Q. Please provide copies of customer research or customer satisfaction surveys or data collection materials and resulting reports, presentations and communications for all research conducted in 2013 and 2014 YTD.

A. Information relating to Newfoundland Power customer research conducted in 2013 and 2014 YTD is provided in the following attachments:

Attachment A:	Q1 2013 Customer Satisfaction Survey
Attachment B:	Q2 2013 Customer Satisfaction Survey
Attachment C:	Q3 2013 Customer Satisfaction Survey (Traditional)[1]
Attachment D:	Q3 2013 Customer Satisfaction Survey (Transactional)[1,2]
Attachment E:	Q4 2013 Customer Satisfaction Survey (Traditional) [1]
Attachment F:	Q4 2013 Customer Satisfaction Survey (Transactional) [1,2]
Attachment G:	Q1 2014 Customer Satisfaction Survey (Transactional)[3]
Attachment H:	Customer Outage Survey (March 2014)
Attachment I:	Reputation Management Survey (May 2014)[4]
Attachment J:	takeCHARGE! Home Energy Use & Conservation Tracking Study (May 2013)
Attachment K:	takeCHARGE! Commercial Customer Research (October 2013)
Attachment L:	takeCHARGE! Process and Market Evaluation (June 2014)
Attachment M:	Mini-Split Heat Pump Customer Research (2014)[5]
Attachment N:	Quarterly Regulatory Reports to the Public Utilities Board (2013 – 2014)

[1] Newfoundland Power conducted two customer satisfaction surveys in each of Q3 2013 and Q4 2013. These included (i) the traditional customer satisfaction survey used by Newfoundland Power since the late 1990s and (ii) a more detailed transactional focused customer survey. The transactional survey was used to gain additional insight into the Company's performance relating to the Company's Customer Contact Center, field visits from Company employees, and website transactions. The traditional customer satisfaction survey does not have detailed questions concerning *specific* customer interactions with the Company.

[2] Newfoundland Power did not generate any reports, presentations, or communications in relation to the data received from the transactional surveys conducted in Q3 and Q4, 2013.

[3] In Q1 2014 Newfoundland Power conducted a customer satisfaction survey that combined elements of the transactional survey as well as the traditional customer satisfaction survey. The survey includes a mixture of customers who have had recent transactions with Newfoundland Power and customers who have not had a recent transaction.

[4] Corporations other than Newfoundland Power and Newfoundland and Labrador Hydro are not identified.

[5] Results for the Mini-Split Heat Pump customer research are not yet compiled.

Q1 2013 Customer Satisfaction Survey

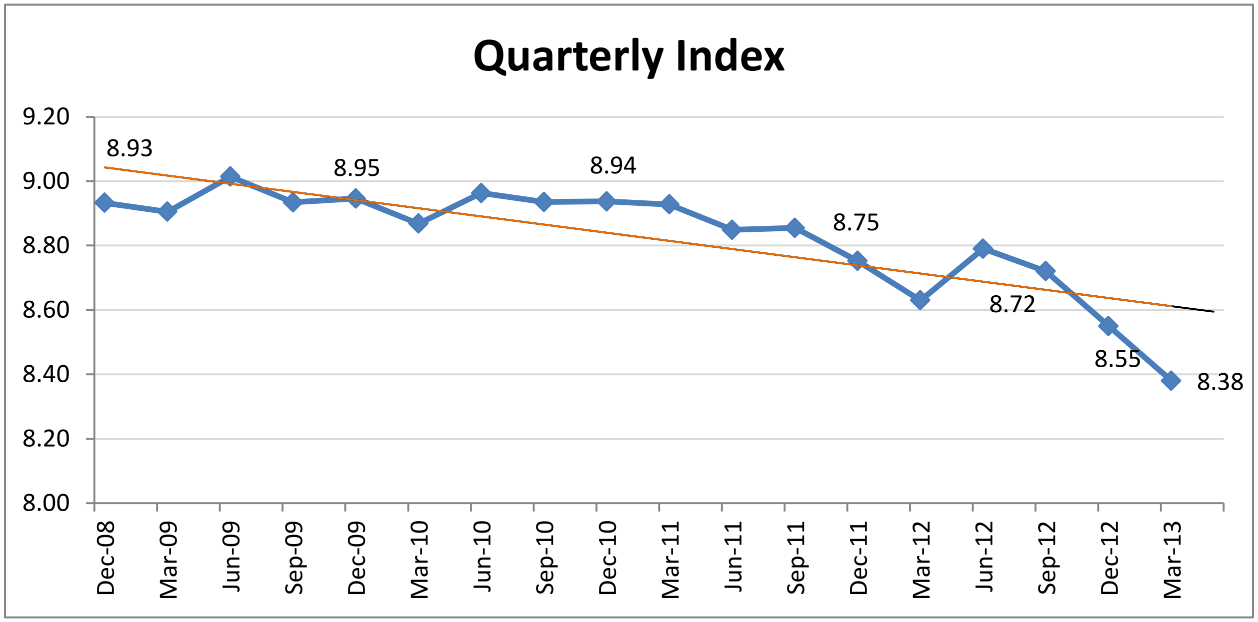
NEWFOUNDLAND POWER

A FORTIS COMPANY

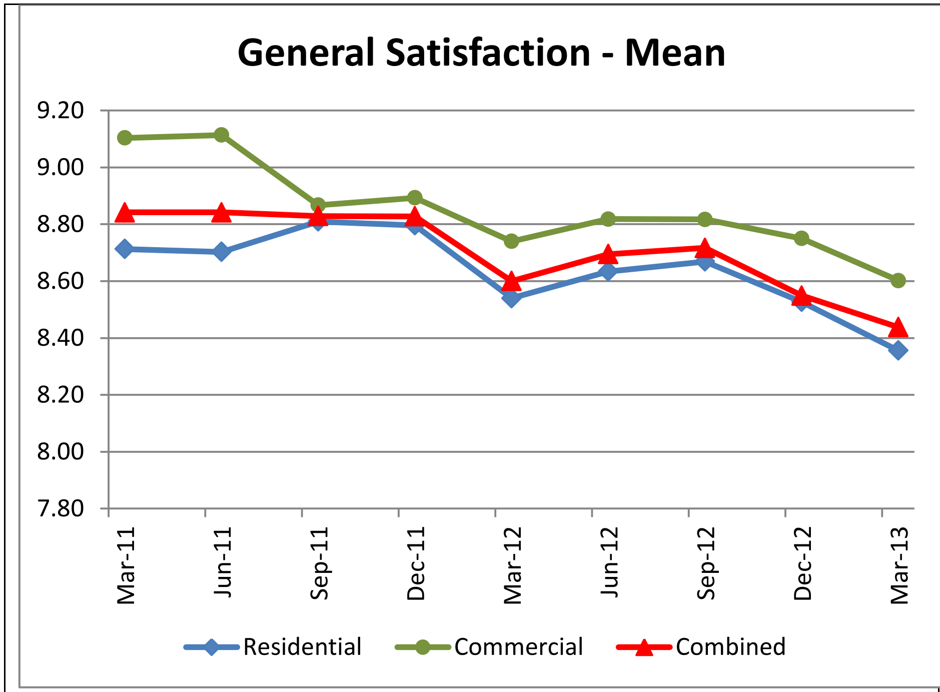
Q1 Customer Satisfaction Report

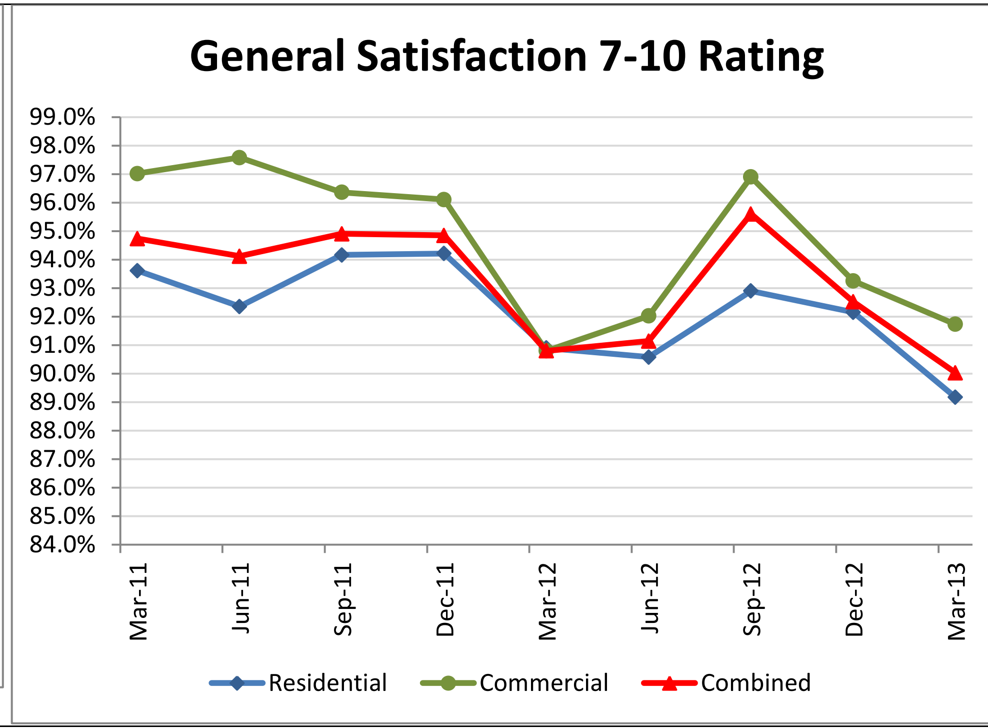
March 31, 2013

Customer Satisfaction Report
March 2013



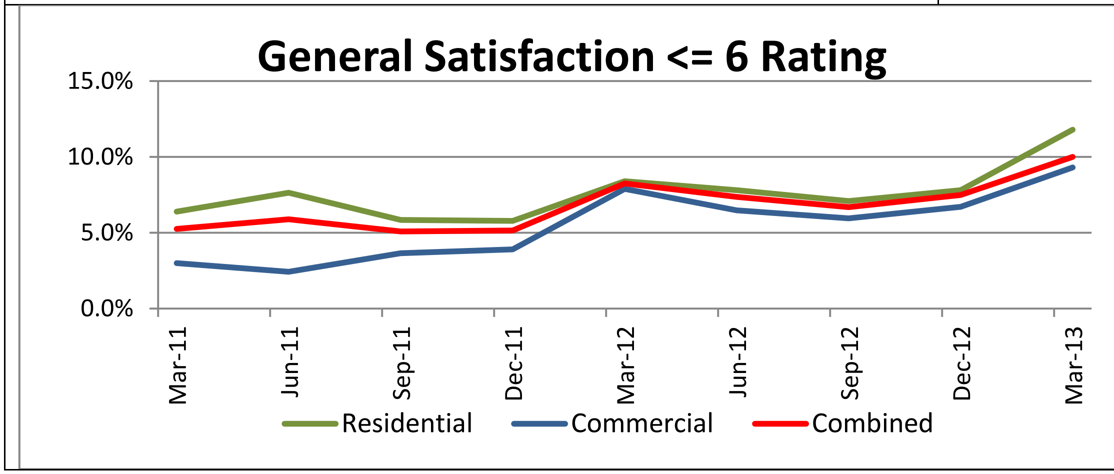
The historical quarterly trend is shown in the above graph. The customer satisfaction index for the 1st quarter 2013 is 83.8%, lower than last quarter 85.5%. This compares with 86.3% in March 2012 and 89.3% in March 2011. The large decline can be attributed to the General Rate Application filed with the PUB asking for an overall rate increase as well as outages during the Winter season, in particular a long-lasting and severe outage on January 11, 2013. Customers indicated price and outages were the reasons they were unsatisfied the most.





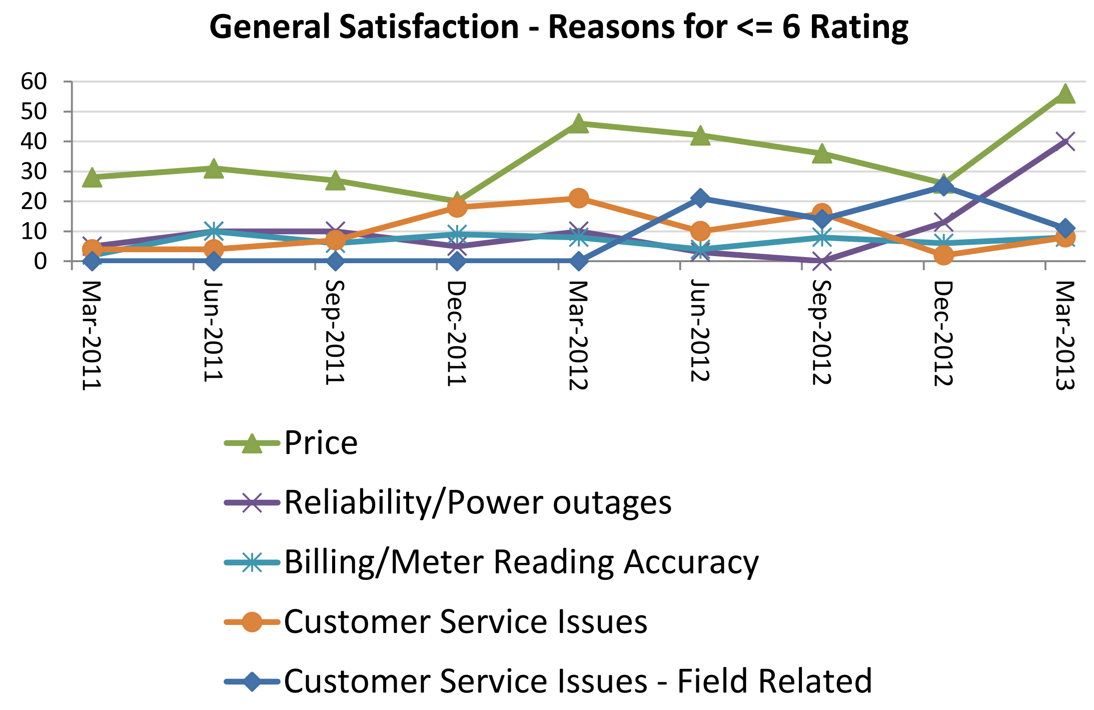
Mean averages the ratings provided by all customer's surveyed.

Percentage of customer's surveyed that gave a 7-10 rating.



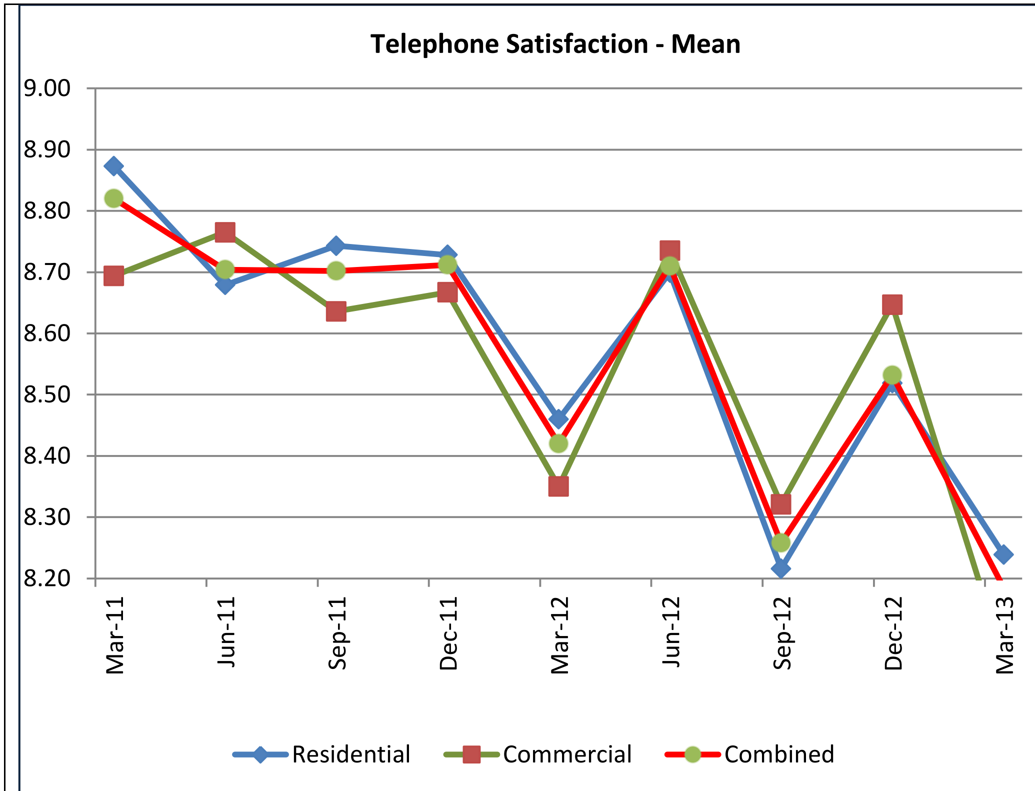
General Satisfaction – 1193 Customers surveyed.

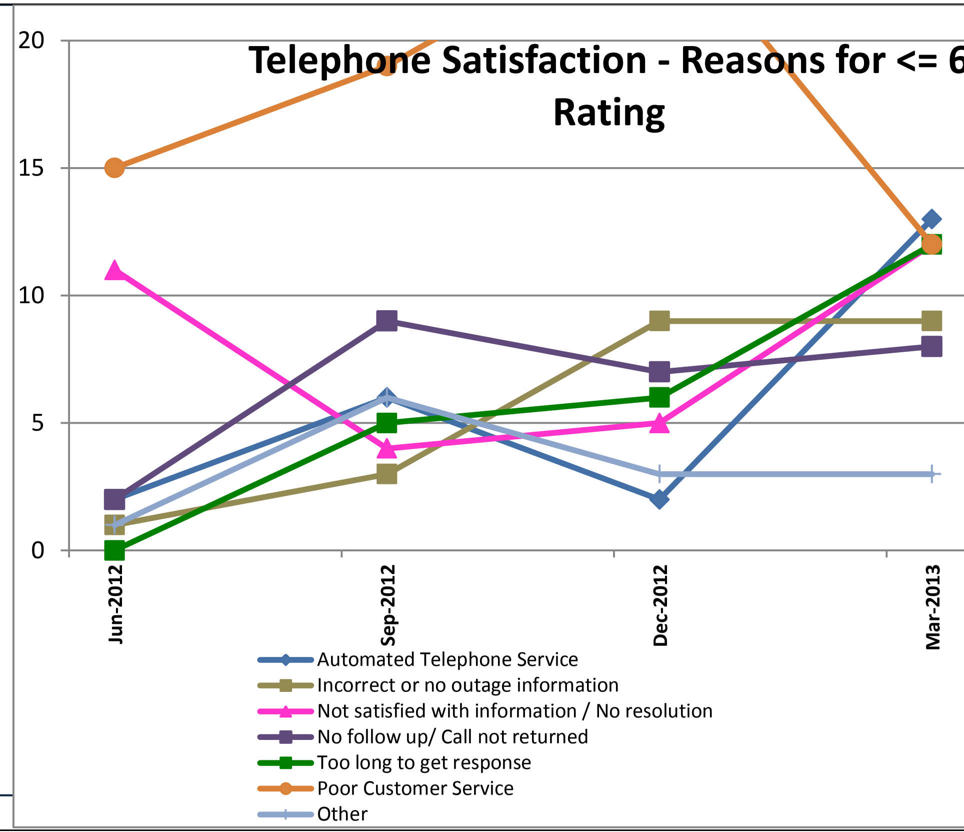
(Mean)	This Quarter	Last Quarter	Same Quarter Last Year
Residential	8.36	8.53	8.54
Commercial	8.60	8.75	8.74
Total	8.38	8.55	8.60
7-10 Rating	% of customer's surveyed that gave a 7-10 rating.		
Residential	89.2%	92.2%	90.9%
Commercial	91.7%	93.3%	90.8%
Total	90.0%	92.5%	90.8%

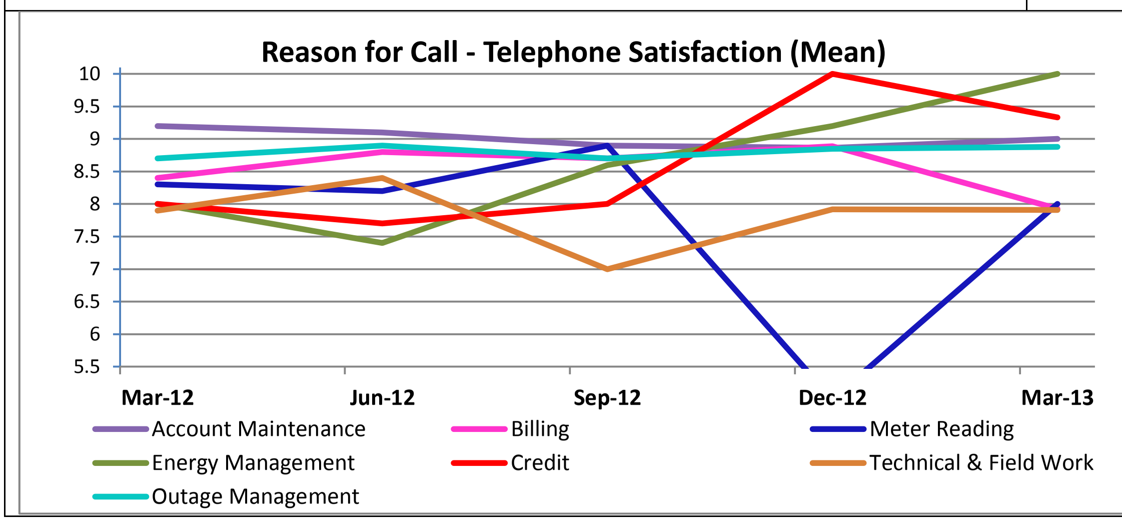


The overall satisfaction of Residential and Commercial customers is down this quarter from last quarter and down from the same quarter last year with both Residential and Commercial customers.

10.0% (119) of customers surveyed gave a rating less than or equal to six (86 Residential and 33 Commercial). 47% (56) indicated price concerns, 33.6% (40) indicated Reliability/Power Outages and 9.24% (11) indicated customer service issues – field related.





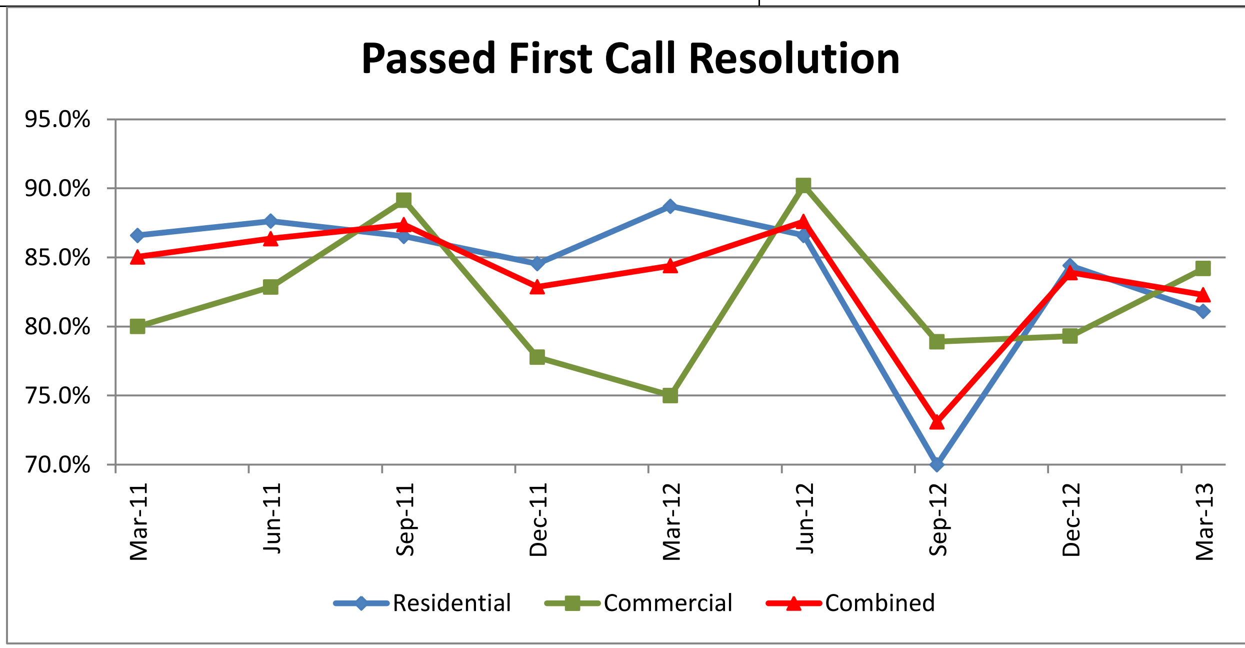


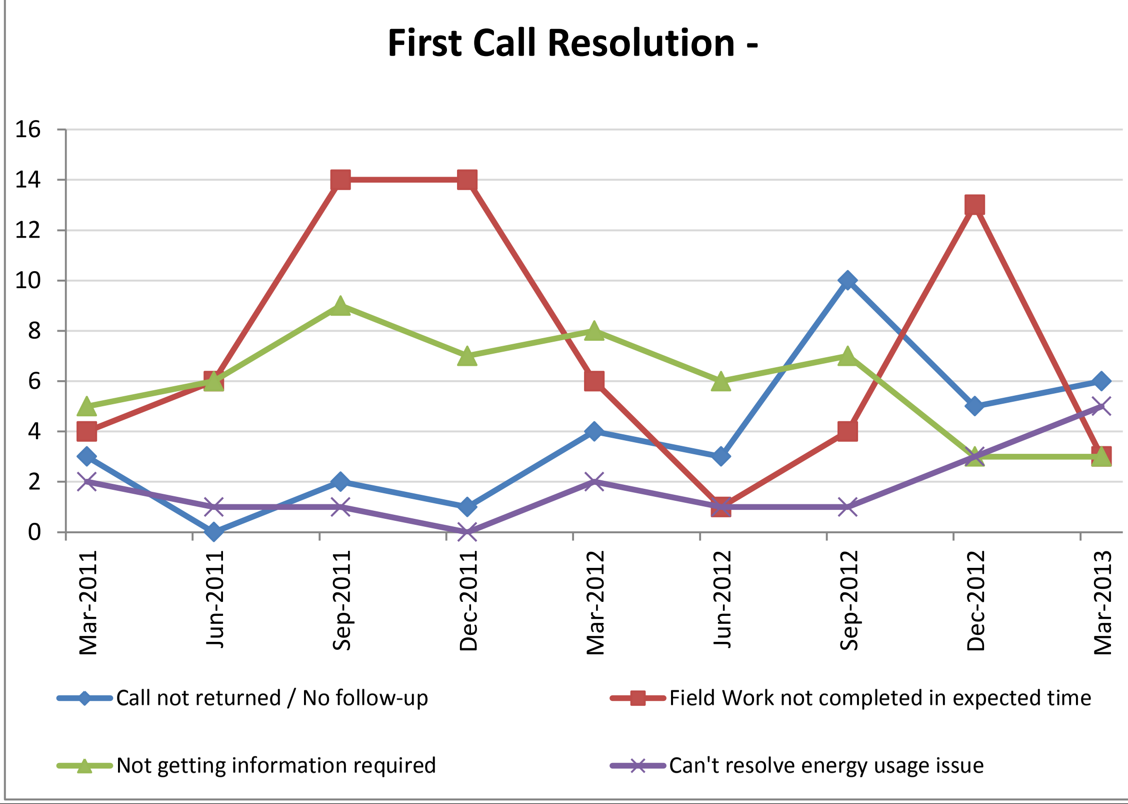
Telephone Satisfaction 31% (368) surveyed called in the last 6 mos.

(Mean)	This Quarter	Last Quarter	Same Quarter Last Year
Residential	8.24	8.52	8.46
Commercial	8.07	8.65	8.35
Overall Total	8.19	8.53	8.42
7-10 Rating	% of customer's who called that gave a 7-10 rating.		
Residential	84.5%	86.7%	86.6%
Commercial	83.8%	89.3%	91.2%
Total	84.2%	87.6%	88.2%

The Overall Telephone Satisfaction rating is lower this quarter compared to last quarter and the same quarter last year. The percentage of customers giving a 7 or better rating was also lower for both comparison quarters. 19% of the people rating us lower than 7 said it was because of our automated telephone service and 13% said it was because of incorrect or no outage information which is consistent with what we heard from customers following the January 11th Power Outage.

15.76% (58) gave <=6 rating compared to 12.42% (55) last quarter.



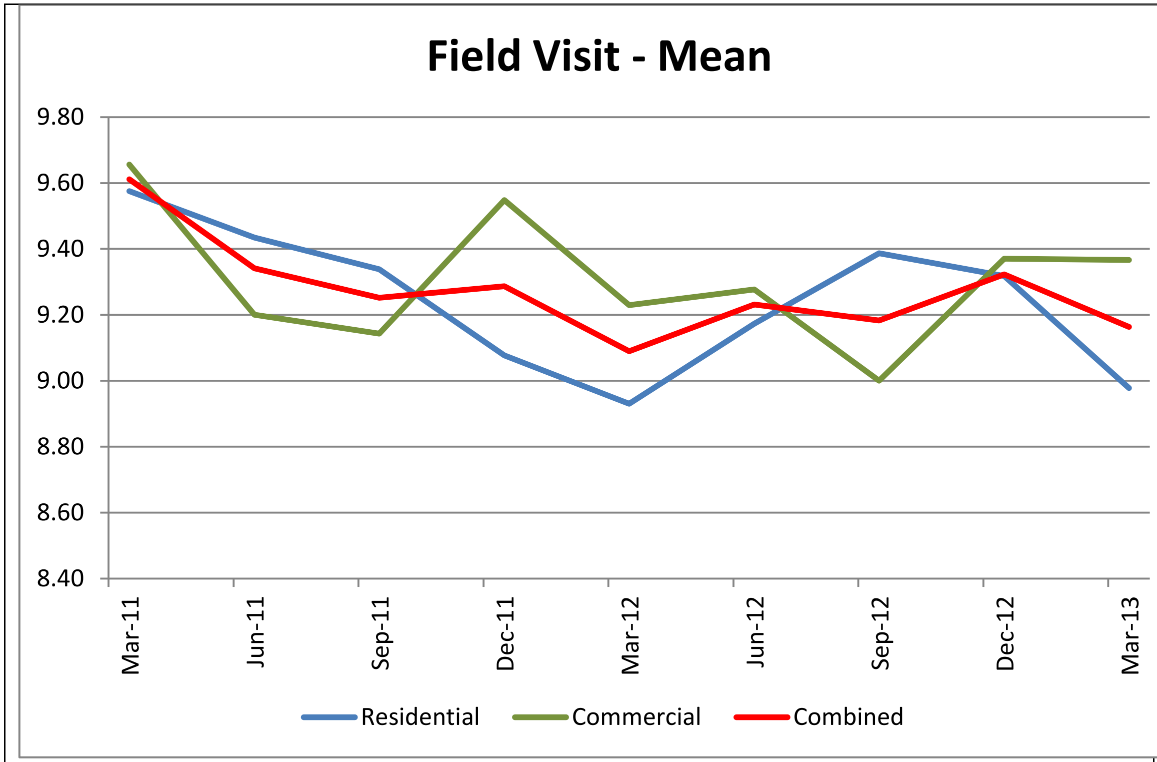


First Call Resolution - Percentage of customer's passed First Call Resolution.

	This Quarter	Last Quarter	Same Quarter Last Year
Residential	81.1%	84.4%	88.7%
Commercial	84.2%	79.3%	75.0%
Total	82.3%	83.9%	84.4%

Of the 147 customers that spoke to a Customer Account Representative, 82.3% (121) had their issue resolved the first time and 17.7% (26) had to call more than once. This compares to 17.5% (43) last quarter and 15.6% (28) same quarter last year.

The main reasons given by customers who had to call more than once; 27% (6) indicated "Call Not Returned/No follow-up", 23% (5) said "Other" and 23% (5) indicated "Can't resolve energy usage issue".



Field Visit Satisfaction 7.2% (86) surveyed had field visit in last 6 mos.

(Mean)	This Quarter	Last Quarter	Same Quarter Last Year
Residential	8.98	9.32	8.93
Commercial	9.37	9.37	9.23
Overall Total	9.16	9.32	9.09
7-10 Rating	% of customer's with a field visit gaving a 7-10 rating.		
Residential	93.3%	98.8%	88.3%
Commercial	95.1%	96.3%	96.9%
Overall Total	94.2%	97.6%	92.7%

The Overall Field Satisfaction rating was lower this quarter compared to last quarter and higher than the same quarter last year.

Of the 86 customers that had a Field Visit in the last 6 months, 5 (5.81%) gave a rating <= 6.

Newfoundland Power
Customer Satisfaction Survey
March 2013

SECTION 1: GENERAL SERVICE (gensat)

1. First, I would like to get your opinion of the overall service provided by Newfoundland Power. On a 10 point scale where 1 is "Not at all satisfied" and 10 is "Fully satisfied", how satisfied are you with the overall service provided by Newfoundland Power?

   1 2 3 4 5 6 7 8 9 10

IF RESPONSE IS 6 OR LESS GO TO QUESTION 2, ELSE GO TO QUESTION 3.

---

2. Can you tell me the main reason why you gave a rating of _____? (Bring answer from Q1) (gensatwy)

SECTION 2: CONTACT CENTRE SERVICE

3. Have you called Newfoundland Power within the past six months? (callast6)

   1. Yes **(Continue at Q4)**
   2. No **(Skip to Q10)**
   3. Don't know **(Skip to Q10)**

4. Overall, on a scale of 1 to 10, where 1 is "Not at all satisfied" and 10 is "Fully satisfied", how satisfied are you in general with the service you received by phone from Newfoundland Power?. (phnsat)

   1 2 3 4 5 6 7 8 9 10

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION 5, ELSE SKIP TO Q6

5. Can you tell me the main reason why you gave a rating of _____? (Bring answer from Q4) (phsatwhy)

6. Did you speak to a Customer Account Representative or did you call to get your account balance using the recorded telephone system, or did you call for recorded power outage information? (whatcald)

   1. Customer Account Representative **(Continue at Q7)**
   2. Automated Account System **(Skip to Q10)**
   3. Automated power outage information system **(Skip to Q10)**

7. What was the main reason for your recent call to Newfoundland Power?

DO NOT READ LIST. PROMPT IF NECESSARY. ACCEPT ALL APPROPRIATE RESPONSES. (Check boxes for multiple responses)

1. Account Maintenance (whycall1)
(New account hookup, moving to new address, closing an account, change of address, change of contact information etc.)

2. Billing (whycall2)
(billing adjustment, sign up for ebills or Equal payment plan or Automatic Payment Plan, ask about payment locations, ask a question about the bill)

3. Meter Reading (whycall4)
(Inquiry about a meter reading estimate, to provide a meter reading, to ask about access to meter or a meter change out)

4. Energy Management (whycal58)
(To ask how to reduce energy usage, find out about programs and rebates for thermostats, insulation or windows, to ask for energy efficiency advise)

5. Credit (whycall3)
(Find out balance owing on account, customers who are disconnected, customer who are in collection status and need to make payment arrangements)

6. Technical and Field work (whycl791)
(Inquiry about tree trimming, inquiry about a cabin hookup or powerline extensions, calls looking for a technician or is expecting a field visit from a technician or linesperson.)

7. Outage Management (whycl611)
(Outage information, report an outage, report a power emergency, report a damaged or non-working streetlight)

(whycloth) **(whycltxt)**

IF 5, or 7 WAS CHECKED, SKIP TO QUESTION 10, ELSE CONTINUE QUESTION 8

8. Did the Newfoundland Power representative complete your request or resolve your issue the first time you called the Contact Centre? (firstme)

    1. Yes **(Skip to Q10)**
    2. No **(Continue at Q9)**

9. Can you tell me why you had to call more than once to have this issue resolved? (whymore)

Text box for 250 characters

SECTION 4: FIELD SERVICE

10. Have any of the following field representatives visited your home/business in the past six months? (whovisit)

    1. Customer Service Specialist (Continue at Question 11)
    2. Lineperson (Continue at Question 11)
    3. Technician (Continue at Question 11)
    4. Meter Person, NOT the Meter Reader (Continue at Question 11)
    5. Collector (Skip to Question 13) **or MISC Section 5 if it exists**
    6. None of the above **(Do not read) If "None of the above", skip to Q13**

11. Overall, on a scale of 1 to 10, where 1 is "Not at all satisfied" and 10 is "Fully satisfied", how would you rate the quality of service provided by the field representative? (ratevist)

    1 2 3 4 5 6 7 8 9 10

IF RESPONSE IS 6 OR LESS, GO TO QUESTION 12 ELSE GO TO QUESTION 13

12. Can you tell me the main reason why you gave a rating of _____? (whyrtvst)

13. Age of respondent (age)

    (age) (area) (type)

THANK YOU VERY MUCH FOR YOUR HELP.

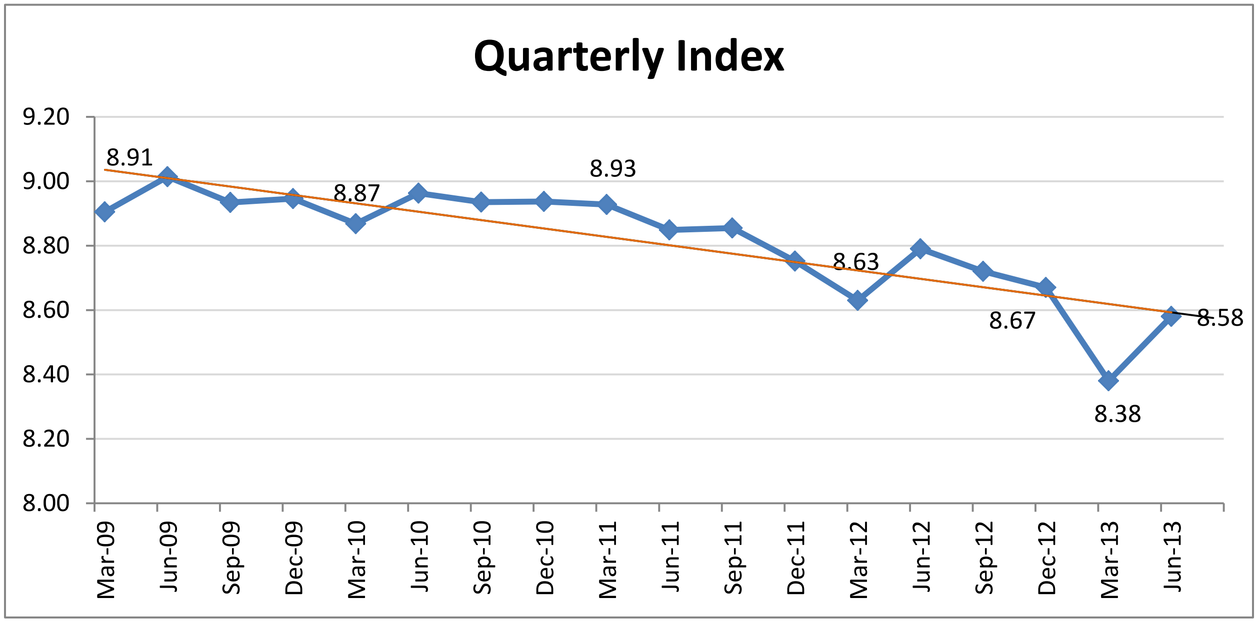
Q2 2013 Customer Satisfaction Survey

NEWFOUNDLAND POWER
A FORTIS COMPANY

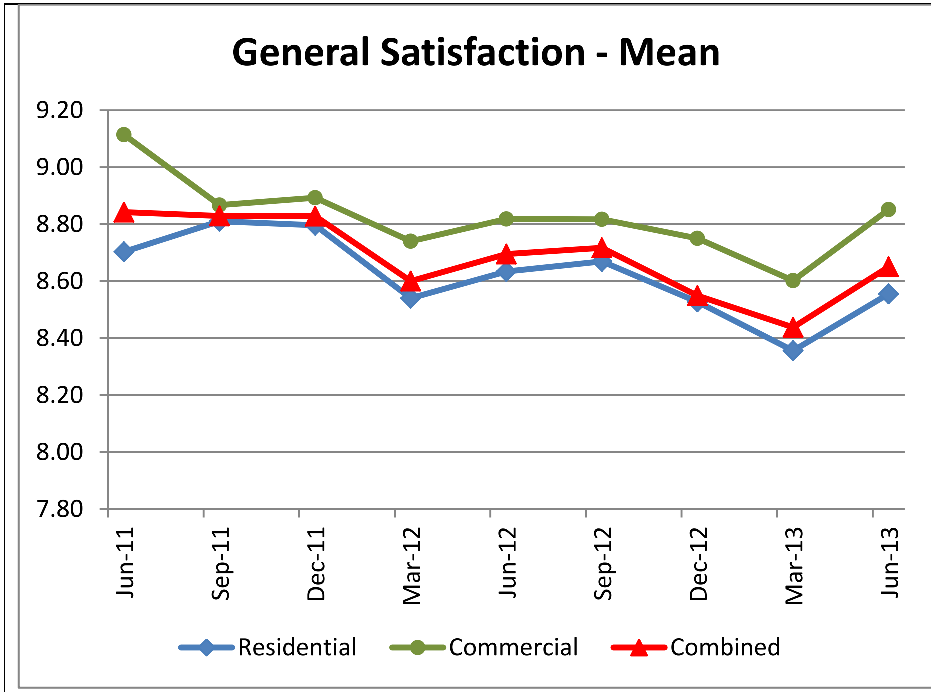
Q2 Customer Satisfaction Report

June 30, 2013

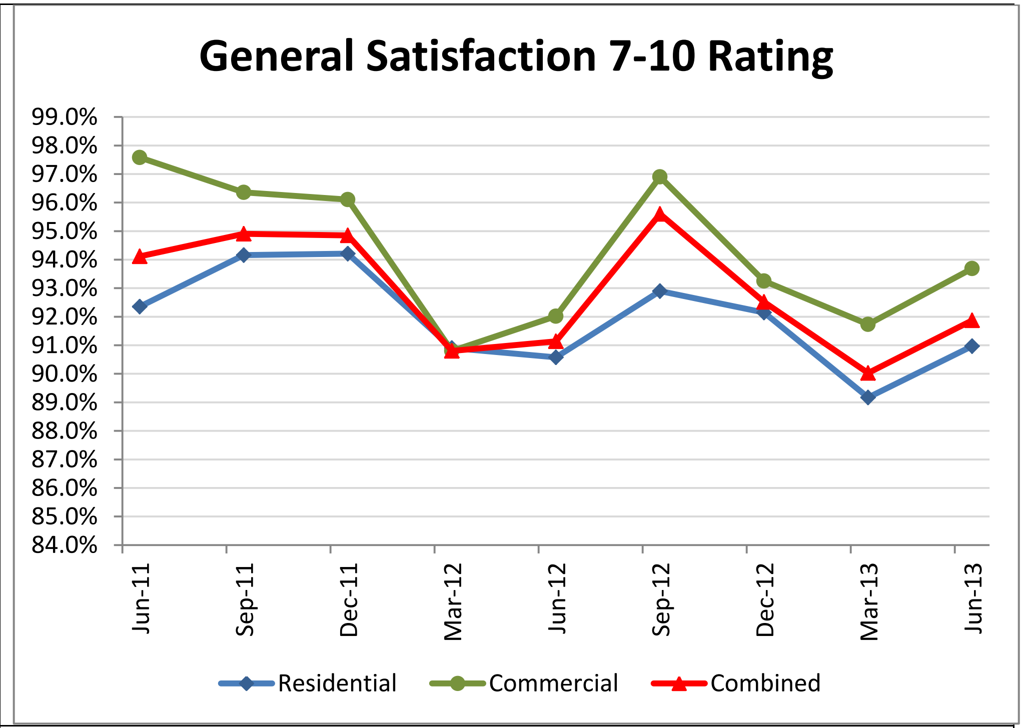
Customer Satisfaction Report
June 2013



Not updated:
The historical quarterly trend is shown in the above graph. The customer satisfaction index for the 2nd quarter 2013 is 85.8%, higher than last quarter's 83.8%. This compares with 87.9% in June 2012 and 88.5% in June 2011



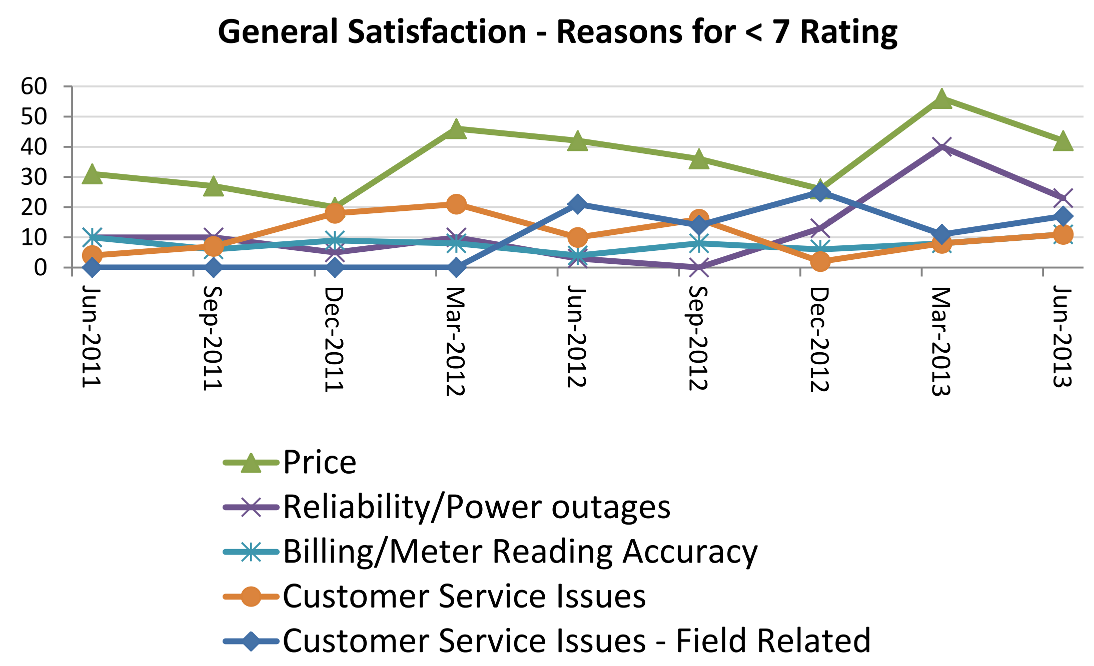
Mean averages the ratings provided by all customer's surveyed.



Percentage of customer's surveyed that gave a 7-10 rating.

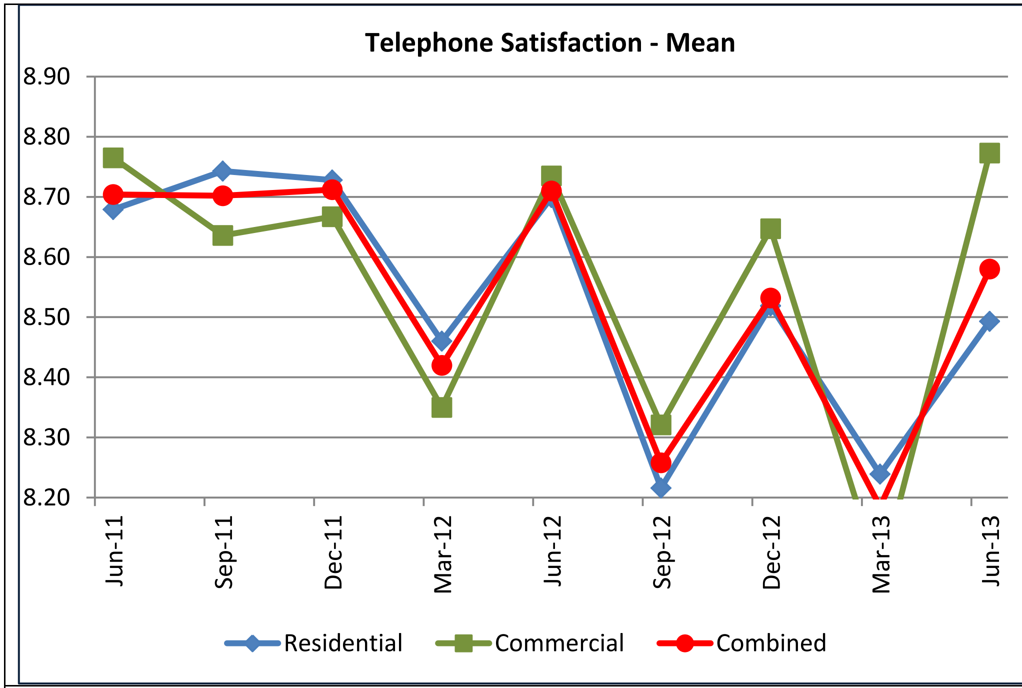
General Satisfaction – 1200 Customers surveyed.

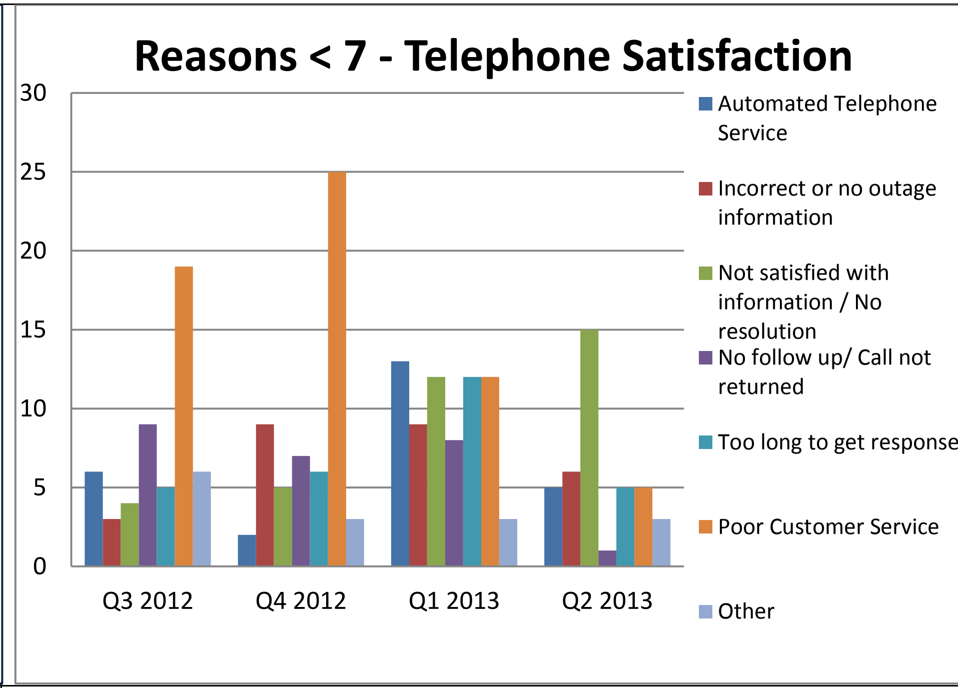
(Mean)	This Quarter	Last Quarter	Same Quarter Last Year
Residential	8.56	8.36	8.63
Commercial	8.85	8.60	8.82
Total	8.58	8.38	8.65
7-10 Rating	% of customer's surveyed that gave a 7-10 rating.		
Residential	91.0%	89.2%	90.6%
Commercial	93.7%	91.7%	92.0%
Total	91.9%	93.7%	91.1%

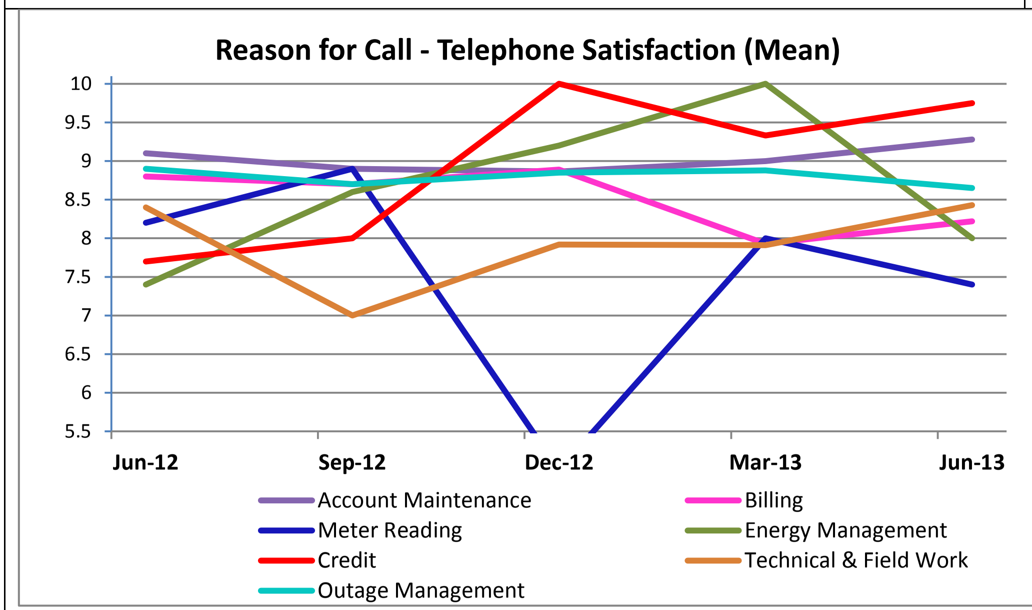


The overall satisfaction of Residential and Commercial customers is up this quarter from last quarter and down from the same quarter last year.

8.13 % (97) of customers surveyed gave a rating less than or equal to six (72 Residential and 25 Commercial). 35.6% indicated price concerns, 19.5% chose reliability/power outages 14.4% customer service issues – field related and 9.3% identified billing and meter reading accuracy for the lower rating.





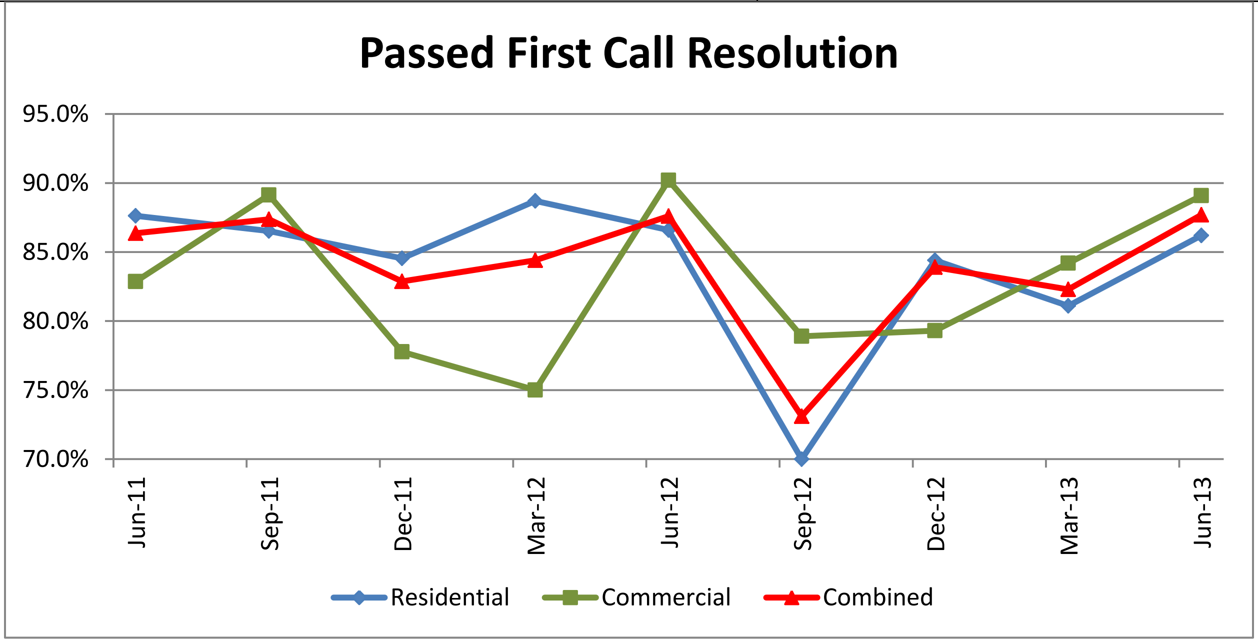


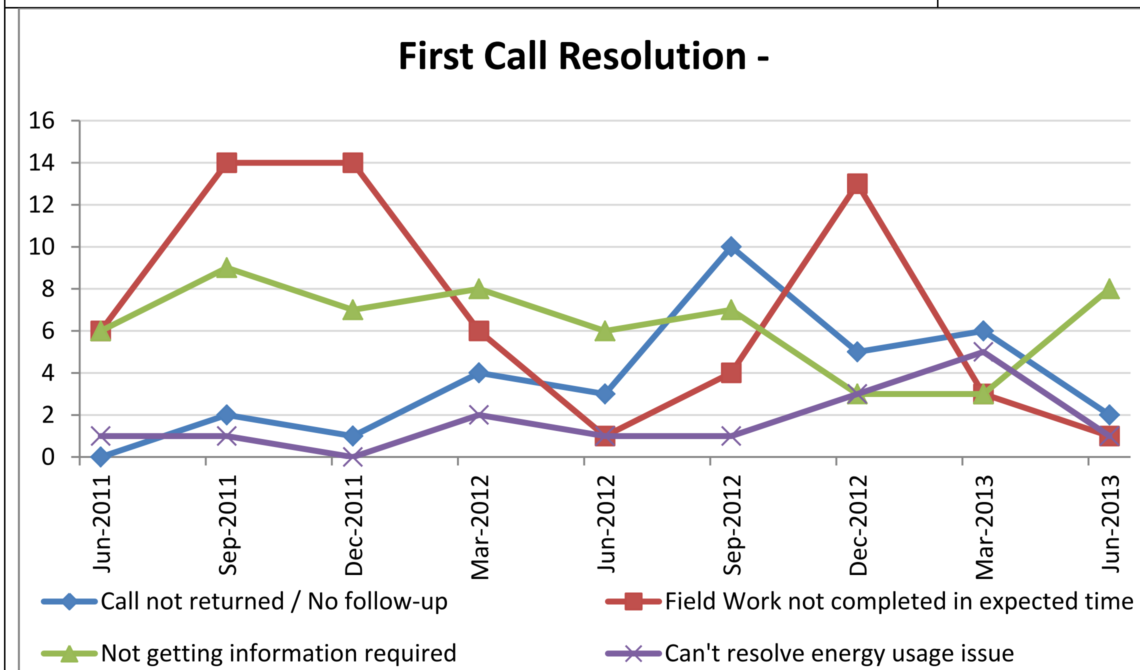
Telephone Satisfaction 25.8% (310) surveyed called in the last 6 mos.

(Mean)	This Quarter	Last Quarter	Same Quarter Last Year
Residential	8.49	8.24	8.70
Commercial	8.77	8.07	8.74
Overall Total	8.52	8.22	8.70
7-10 Rating	% of customer's who called that gave a 7-10 rating.		
Residential	87.8%	84.5%	88.6%
Commercial	91.8%	83.8%	95.2%
Total	89.0%	84.2%	90.6%

The Overall Telephone Satisfaction rating is higher this quarter than last quarter and lower than the same quarter last year. The percentage of customers giving a 7 or better rating was less than last quarter and the same quarter last year.

11 % (34) gave < 7 rating compared to 15.8% (58) last quarter. 38% (15) were not satisfied with the information they received or had no resolution to their problem.



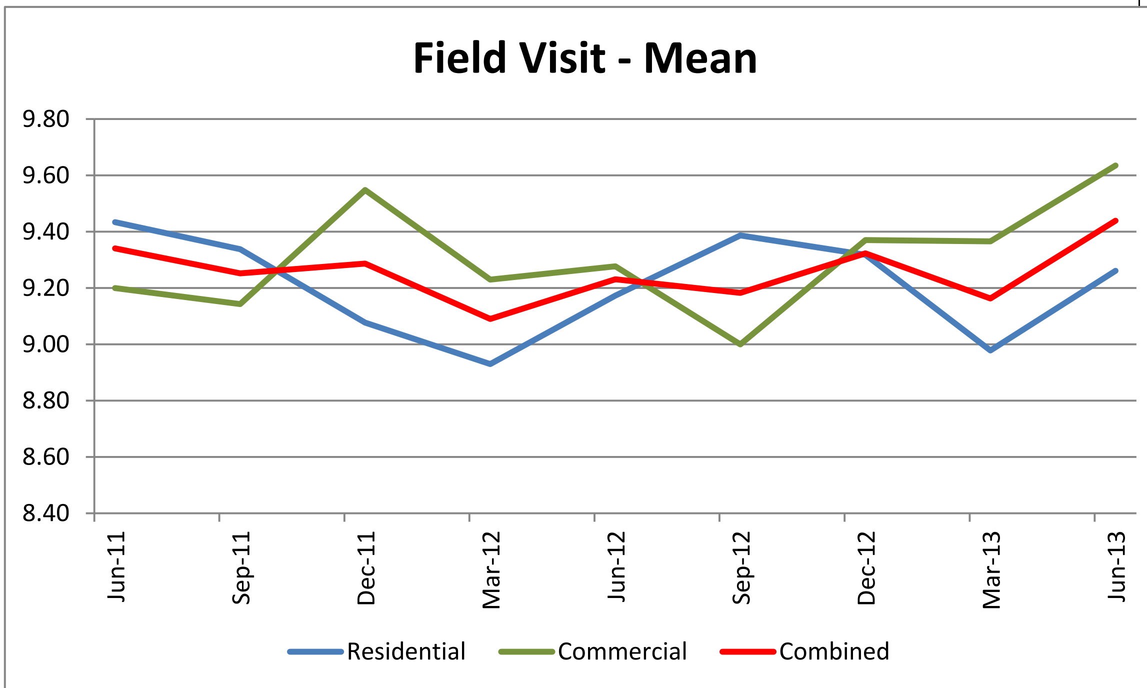


First Call Resolution - Percentage of customer's passed First Call Resolution.

	This Quarter	Last Quarter	Same Quarter Last Year
Residential	86.2%	81.1%	86.6%
Commercial	89.1%	84.2%	90.2%
Total	87.2%	82.3%	87.6%

Of the 164 customers that spoke to a Customer Account Representative, 87.2% had their issue resolved the first time and 12.8% (had to call more than once. This compares to 17.7% last quarter and 12.4% the same quarter last year.

The main reason for given by customers who had to call more than once; 42.1% said “not getting information required” and 36.8% said “other”.



Field Visit Satisfaction 11.0% (132) surveyed had field visit in last 6 mos.

(Mean)	This Quarter	Last Quarter	Same Quarter Last Year
Residential	9.26	8.98	9.17
Commercial	9.64	9.37	9.28
Overall Total	9.30	9.02	9.18
7-10 Rating	% of customer's with a field visit gaving a 7-10 rating.		
Residential	95.7%	93.3%	94.2%
Commercial	98.4%	95.1%	98.5%
Overall Total	97.0%	98.4%	96.6%

The Overall Field Satisfaction rating was greater this quarter compared to last quarter and same quarter last year.

Of the 132 customers that had a Field Visit in the last 6 months, 4 (3%) gave a rating < 7.

Newfoundland Power
Customer Satisfaction Survey
June 2013

SECTION 1: GENERAL SERVICE (gensat)

1. First, I would like to get your opinion of the overall service provided by Newfoundland Power. On a 10 point scale where 1 is "Not at all satisfied" and 10 is "Fully satisfied", how satisfied are you with the overall service provided by Newfoundland Power?

   1 2 3 4 5 6 7 8 9 10

IF RESPONSE IS 6 OR LESS GO TO QUESTION 2, ELSE GO TO QUESTION 3.

---

2. Can you tell me the main reason why you gave a rating of _____? (Bring answer from Q1) (gensatwy)

SECTION 2: CONTACT CENTRE SERVICE

3. Have you called Newfoundland Power within the past six months? (callast6)

   1. Yes **(Continue at Q4)**
   2. No **(Skip to Q10)**
   3. Don't know **(Skip to Q10)**

4. Overall, on a scale of 1 to 10, where 1 is "Not at all satisfied" and 10 is "Fully satisfied", how satisfied are you in general with the service you received by phone from Newfoundland Power?. (phnsat)

   1 2 3 4 5 6 7 8 9 10

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION 5, ELSE SKIP TO Q6

5. Can you tell me the main reason why you gave a rating of _____? (Bring answer from Q4) (phsatwhy)

6. Did you speak to a Customer Account Representative or did you call to get your account balance using the recorded telephone system, or did you call for recorded power outage information? (whatcald)

   1. Customer Account Representative **(Continue at Q7)**
   2. Automated Account System **(Skip to Q10)**
   3. Automated power outage information system **(Skip to Q10)**

7. What was the main reason for your recent call to Newfoundland Power?

   DO NOT READ LIST. PROMPT IF NECESSARY. ACCEPT ALL APPROPRIATE RESPONSES. (Check boxes for multiple responses)

   1. Account Maintenance (whycall1)
   (New account hookup, moving to new address, closing an account, change of address, change of contact information etc.)

   2. Billing (whycall2)
   (billing adjustment, sign up for ebills or Equal payment plan or Automatic Payment Plan, ask about payment locations, ask a question about the bill)

   3. Meter Reading (whycall4)
   (Inquiry about a meter reading estimate, to provide a meter reading, to ask about access to meter or a meter change out)

   4. Energy Management (whycal58)
   (To ask how to reduce energy usage, find out about programs and rebates for thermostats, insulation or windows, to ask for energy efficiency advise)

   5. Credit (whycall3)
   (Find out balance owing on account, customers who are disconnected, customer who are in collection status and need to make payment arrangements)

   6. Technical and Field work (whycl791)
   (Inquiry about tree trimming, inquiry about a cabin hookup or powerline extensions, calls looking for a technician or is expecting a field visit from a technician or linesperson.)

   7. Outage Management (whycl611)
   (Outage information, report an outage, report a power emergency, report a damaged or non-working streetlight)

(whycloth) **(whycltxt)**

IF 5, or 7 WAS CHECKED, SKIP TO QUESTION 10, ELSE CONTINUE QUESTION 8

8. Did the Newfoundland Power representative complete your request or resolve your issue the first time you called the Contact Centre? (firstme)

    1. Yes **(Skip to Q10)**
    2. No **(Continue at Q9)**

9. Can you tell me why you had to call more than once to have this issue resolved? (whymore)

Text box for 250 characters

SECTION 4: FIELD SERVICE

10. Have any of the following field representatives visited your home/business in the past six months? (whovisit)

    1. Customer Service Specialist (Continue at Question 11)
    2. Lineperson (Continue at Question 11)
    3. Technician (Continue at Question 11)
    4. Meter Person, NOT the Meter Reader (Continue at Question 11)
    5. Collector (Skip to Question 13) **or MISC Section 5 if it exists**
    6. None of the above **(Do not read) If "None of the above", skip to Q13**

11. Overall, on a scale of 1 to 10, where 1 is "Not at all satisfied" and 10 is "Fully satisfied", how would you rate the quality of service provided by the field representative? (ratevist)

    1 2 3 4 5 6 7 8 9 10

IF RESPONSE IS 6 OR LESS, GO TO QUESTION 12 ELSE GO TO QUESTION 13

12. Can you tell me the main reason why you gave a rating of _____? (whyrtvst)

13.Age of respondent (age)

(age) (area) (type)

THANK YOU VERY MUCH FOR YOUR HELP.

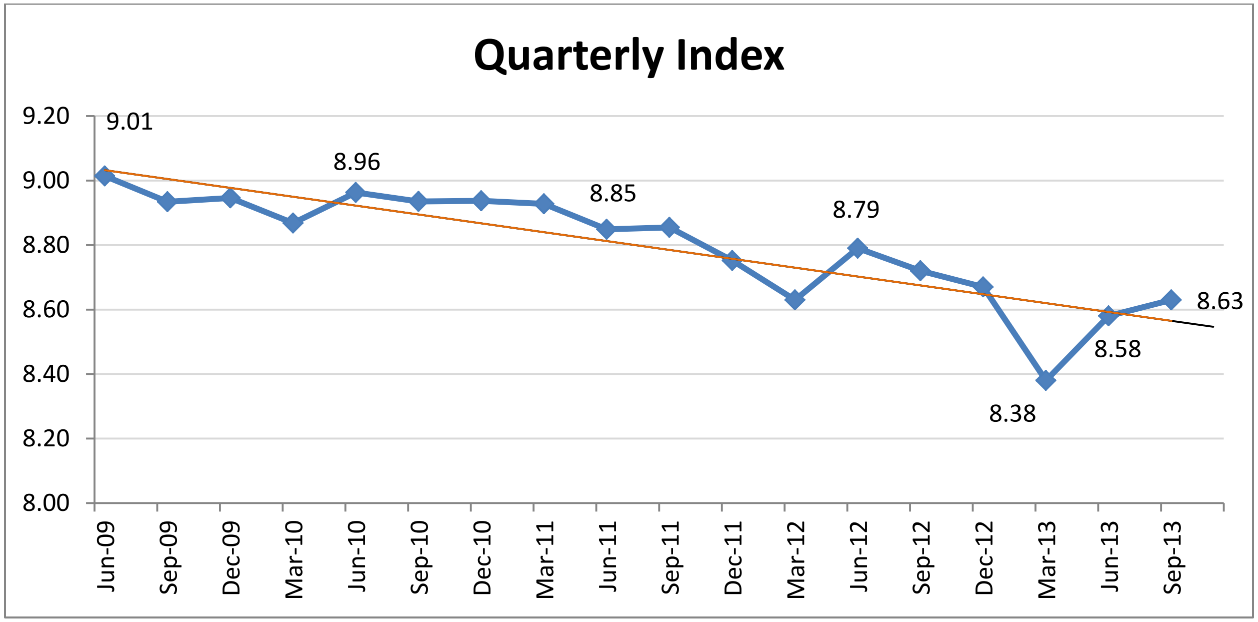
Q3 2013 Customer Satisfaction Survey
(Traditional)

NEWFOUNDLAND POWER
A FORTIS COMPANY

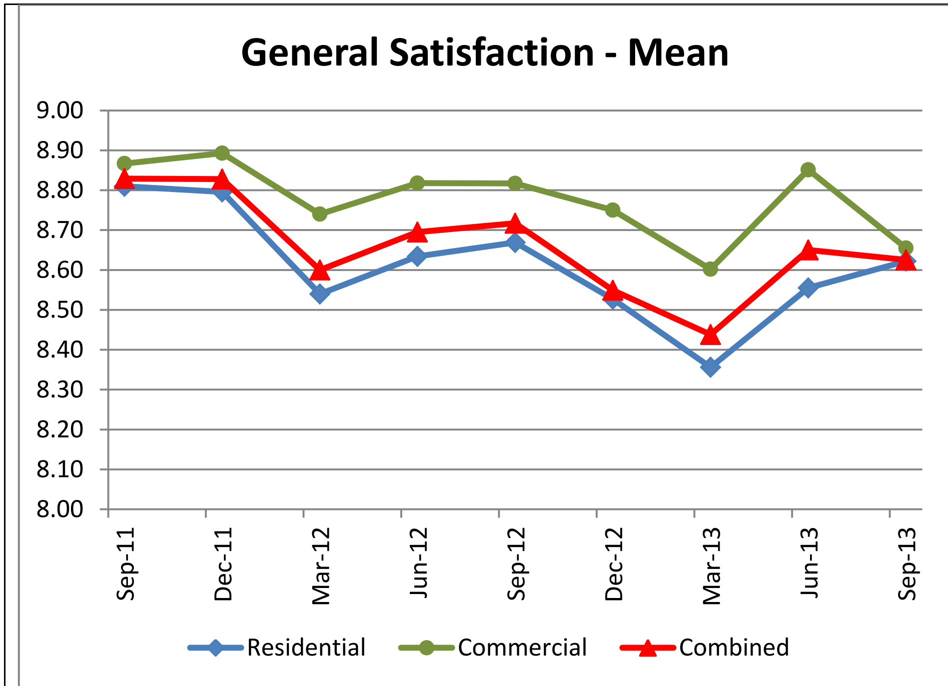
Q3 Customer Satisfaction Report

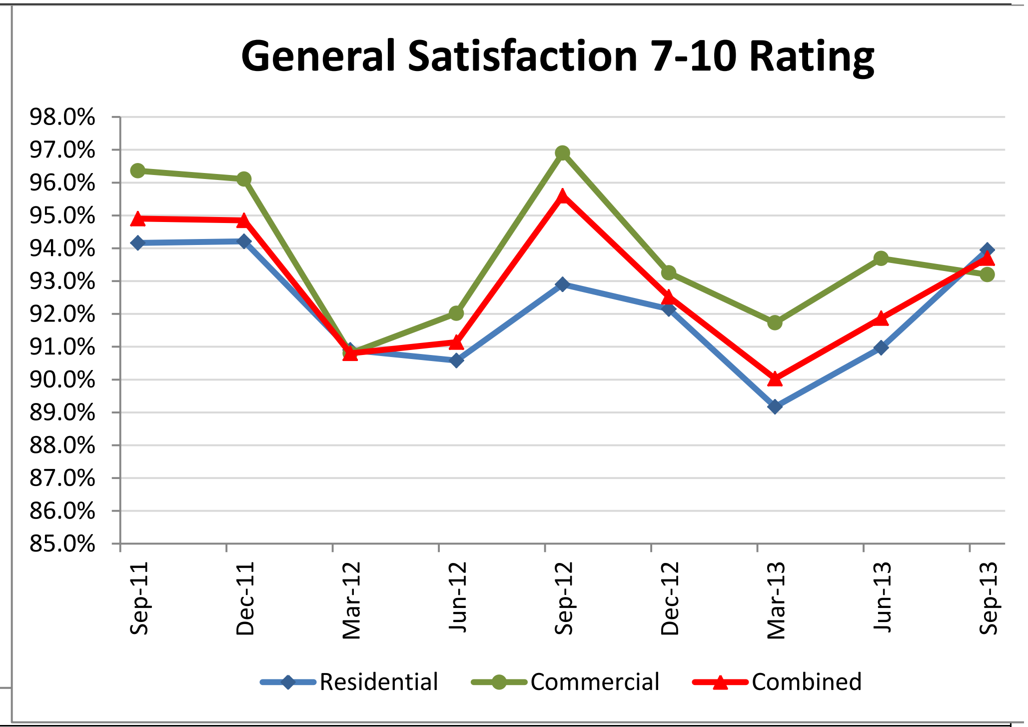
September 30, 2013

Customer Satisfaction Report
September 2013



The historical quarterly trend is shown in the above graph. The customer satisfaction index for the 3rd quarter 2013 is 86.3%, higher than last quarter's 85.8%. This compares with 87.2% in September 2012 and 88.6% in September 2011





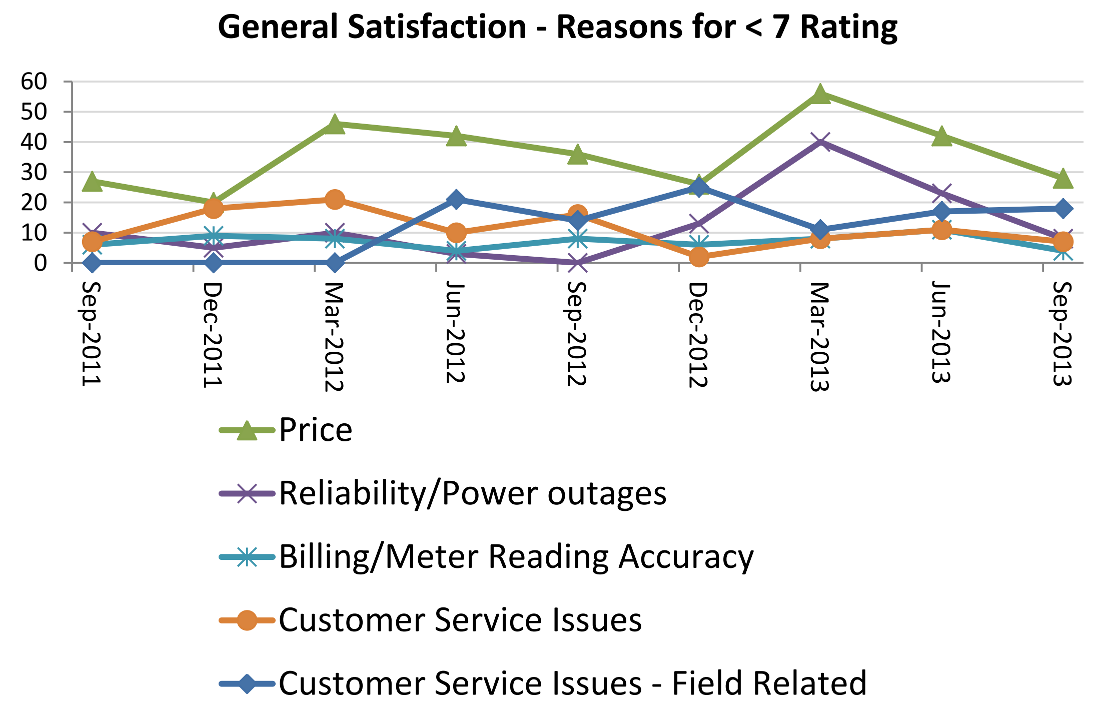
Mean averages the ratings provided by all customer's surveyed.

Percentage of customer's surveyed that gave a 7-10 rating.

General Satisfaction score tends to reflect an overall perception of the Company. Customer's direct interactions with us also influence this score. There is a trend indicating people who have called us tend to rate us lower in General Satisfaction than people who have not. For this survey the mean score of those who called was 8.45 and 8.74 for those who did not call.

General Satisfaction – 1202 Customers surveyed.

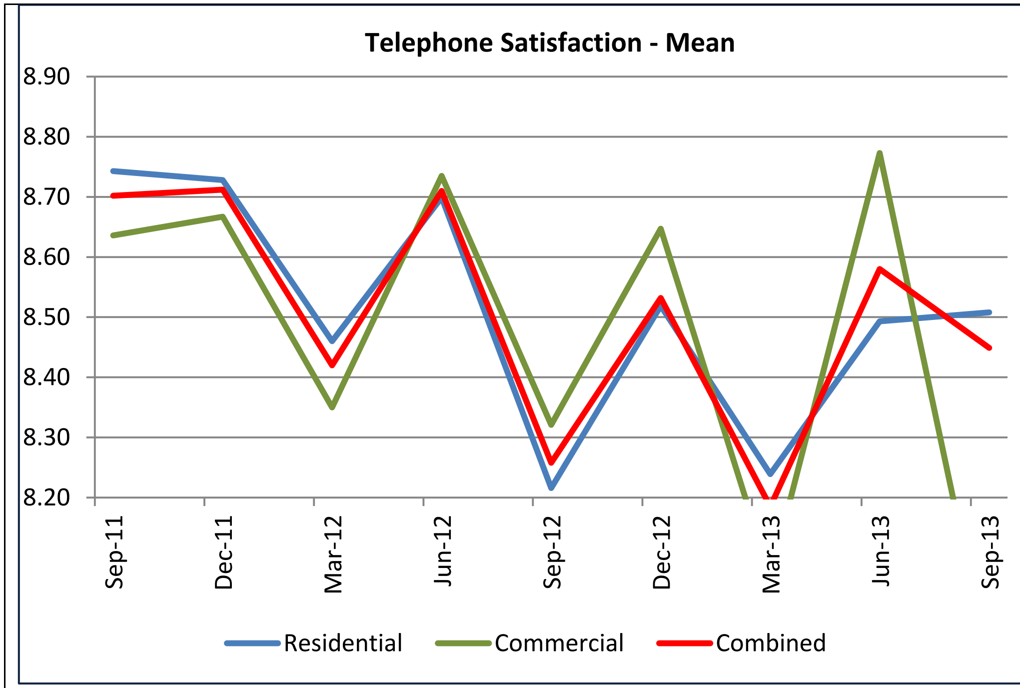
(Mean)	This Quarter	Last Quarter	Same Quarter Last Year
Residential	8.62	8.56	8.67
Commercial	8.66	8.85	8.82
Total	8.63	8.65	8.72
7-10 Rating	% of customer's surveyed that gave a 7-10 rating.		
Residential	94.0%	91.0%	92.9%
Commercial	93.2%	93.7%	96.9%
Total	93.7%	91.9%	95.6%

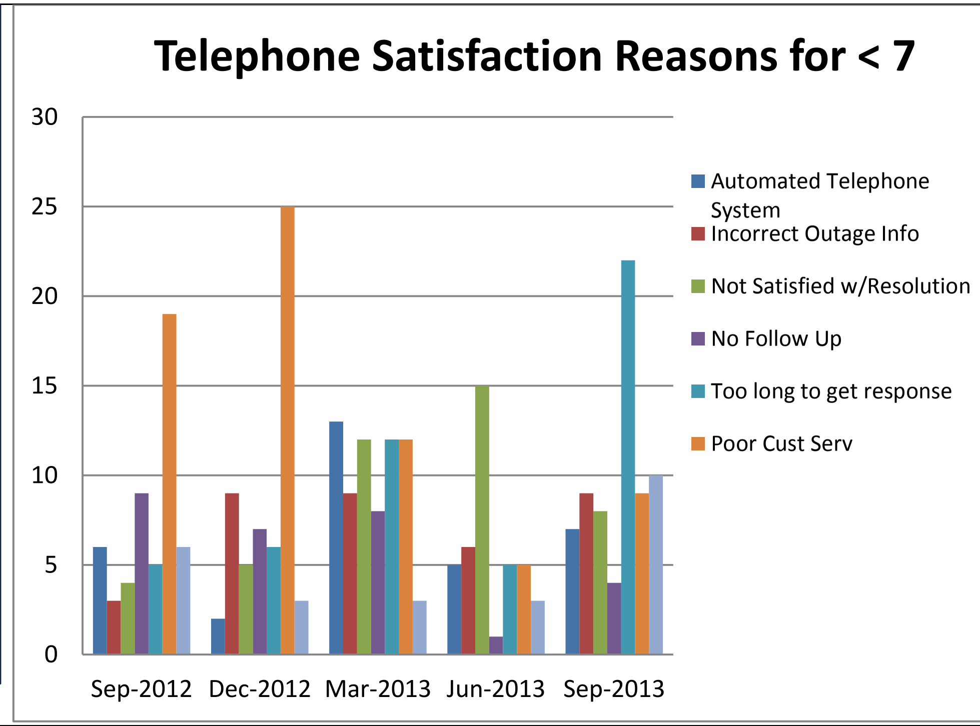


The overall satisfaction of Residential and Commercial customers is down this quarter from last quarter and down from the same quarter last year.

6.3 % (75) of customers surveyed gave a rating less than or equal to six. 37.3%% indicated price concerns, 10.7% chose reliability/power outages 24.0% customer service issues – field related , 6.7% indicated other customer service issues and 5.3% identified billing and meter reading accuracy for the lower rating.

Verbatim comments relating to Customer Service Issues – Field related shows the primary concerns are wait times and lack of communication regarding technical and field work. Concerns are the same for both residential and commercial customers.

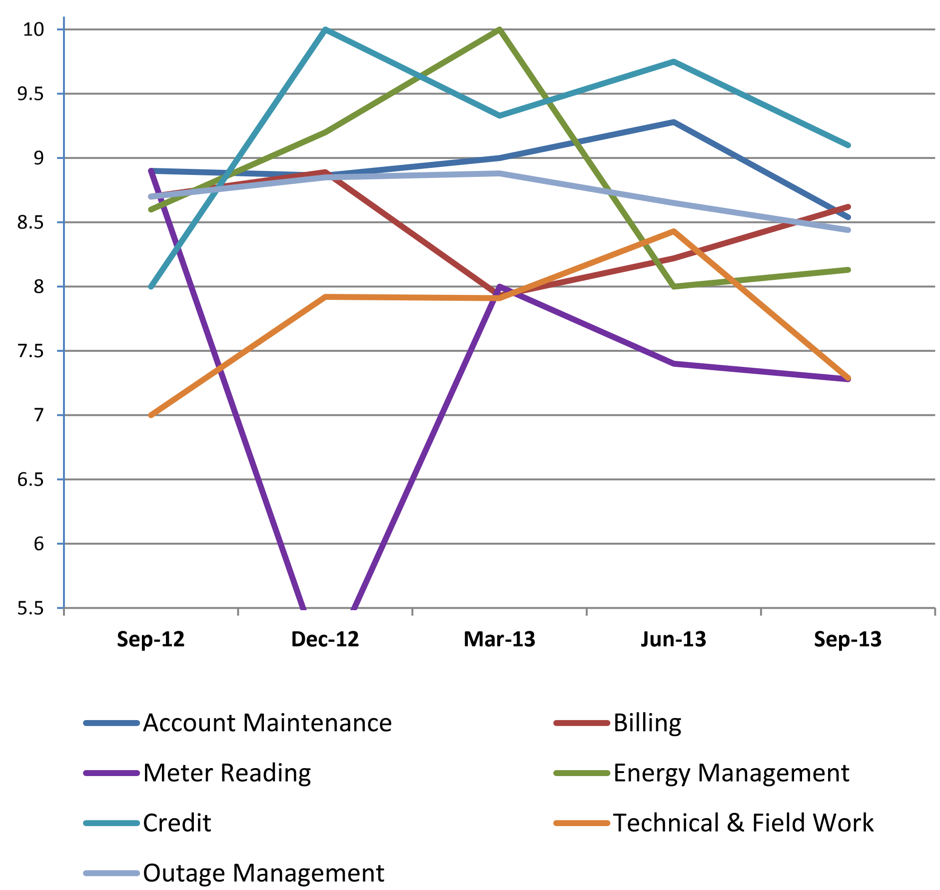




The mean is a good indicator of telephone satisfaction for a given time period. One issue with the survey is the consistency of the telephone sample. Because the population is selected at random, the size of the sample is inconsistent making the confidence levels in the accuracy of each sample different.

Reasons for low telephone satisfaction ratings tend to fluctuate throughout the year. The difficuty and long response times waiting to speak with a technical representative is becoming a bigger issue. People are also giving us low ratings in this area based on how long it is taking for us to complete their technical request(s).

Reason for Call - Telephone Satisfaction (Mean)

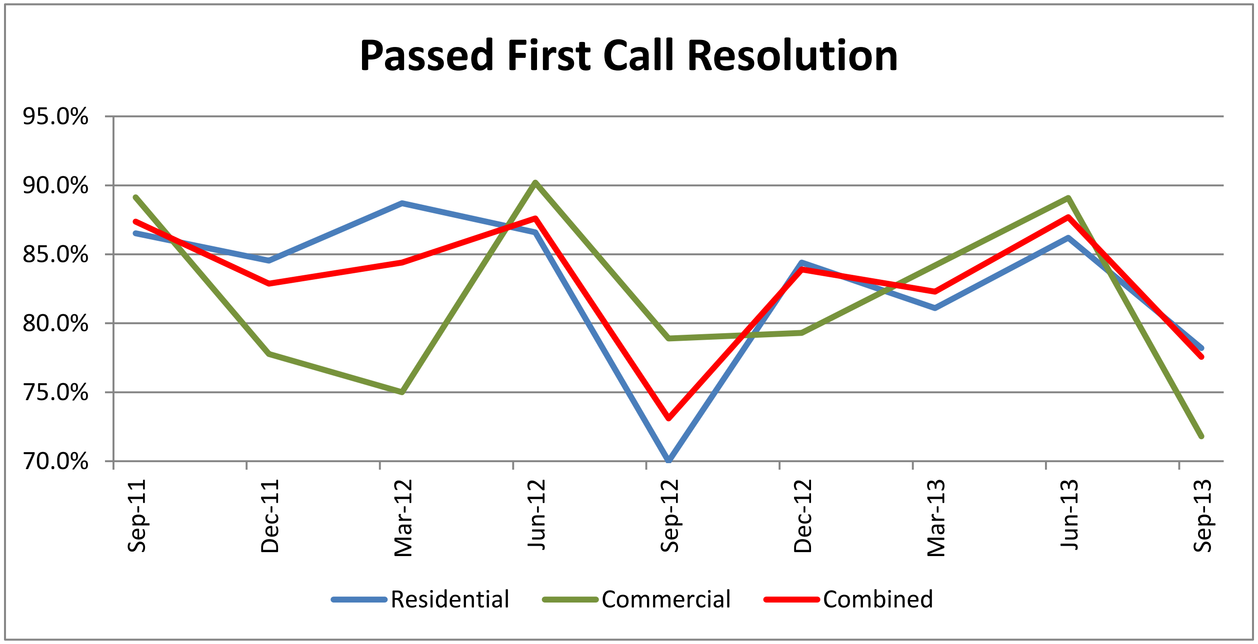


Telephone Satisfaction 33.0% (397) surveyed called in the last 6 mos.

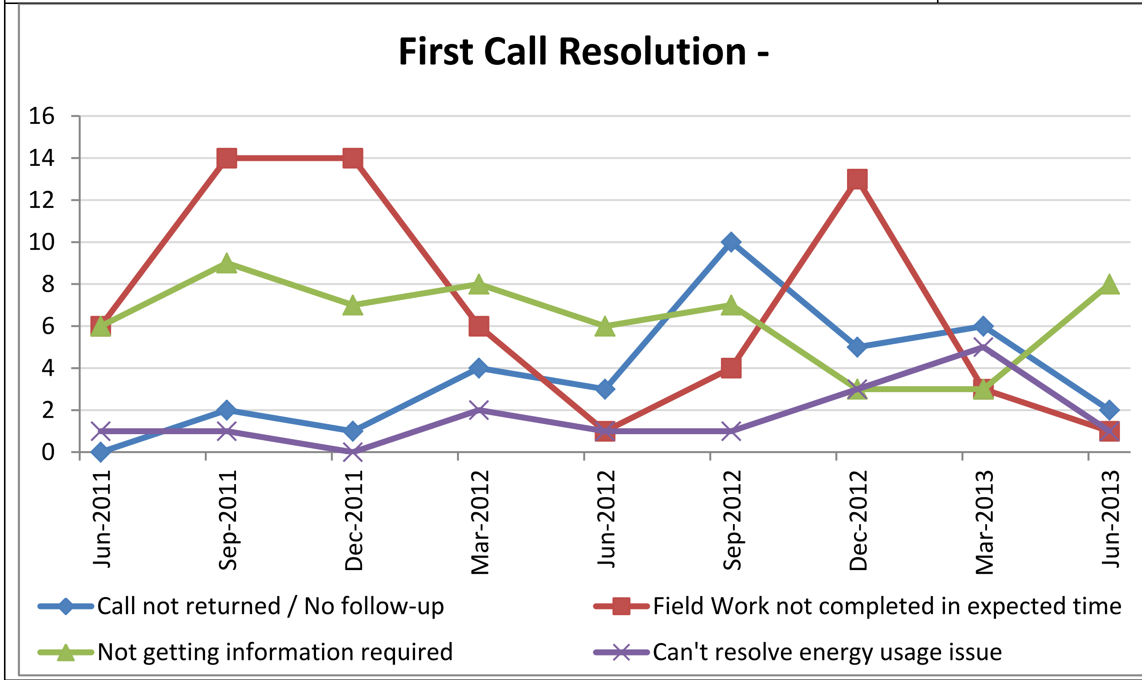
(Mean)	This Quarter	Last Quarter	Same Quarter Last Year
Residential	8.54	8.49	8.22
Commercial	7.92	8.77	8.32
Overall Total	8.45	8.52	8.26
7-10 Rating	% of customer's who called that gave a 7-10 rating.		
Residential	84.9%	87.8%	81.3%
Commercial	80.5%	91.8%	85.7%
Total	83.4%	89.0%	82.6%

The Overall Telephone Satisfaction rating is lower this quarter than last quarter and higher than the same quarter last year. The percentage of customers giving a 7 or better rating was less than last quarter and greater the same quarter last year.

16.6 % (66) gave < 7 rating compared to 12.9% (40) last quarter. 33.3% (were not satisfied with the length of time it took to get a response. A majority of the reasons people indicated they waited too long to get a response was due to wait times for technical and field work, including wait times to speak with a technologist. 13.6% (9) indicated poor customer service which included attitude and knowledge levels of employees.



A customer passes first call resolution (FCR) if they do not have to call back more than once for the same issue. We also measure this internally and that number has a tendency to be much higher than indicated in the satisfaction score. Some of the reasons for this are we measure FCR within a 45 day window internally, but a customer does not have a time limit when answering this question. Customers also could be calling about two separate issues but because they had to call us multiple times, they may perceive it differently than we would internally. Therefore the internal measure is a better indicator of our performance.

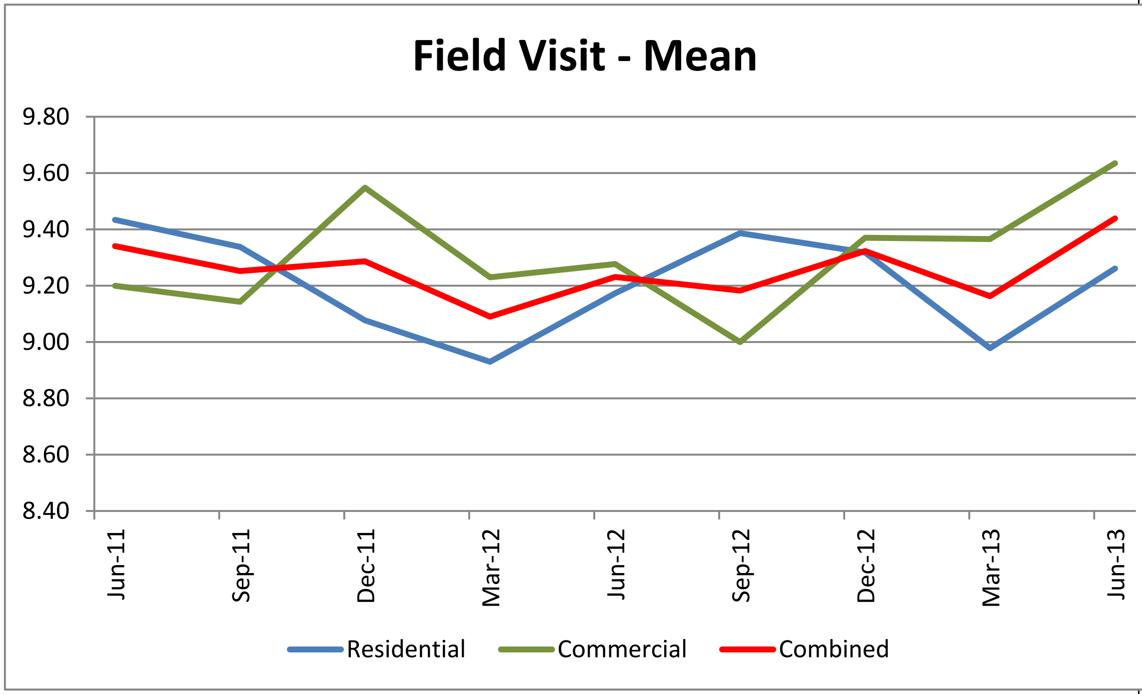


<u>First Call Resolution</u> - Percentage of customer's passed First Call Resolution.

	This Quarter	Last Quarter	Same Quarter Last Year
Residential	78.2%	86.2%	70.0%
Commercial	71.8%	89.1%	78.9%
Total	77.6%	87.2%	73.1%

Of the 227 customers that spoke to a Customer Account Representative, 75.8% had their issue resolved the first time and 24.2% had to call more than once. This compares to 12.8% last quarter and 27.0% the same quarter last year.

The main reasons given by customers who had to call more than once; 23.6% indicated “field work not completed in expected time” and 16.4% said “call not returned/no follow-up”. This was a combination of technical and customer service staff complaints.



Field Visit Satisfaction 9.7% (117) surveyed had field visit in last 6 mos.

(Mean)	This Quarter	Last Quarter	Same Quarter Last Year
Residential	9.31	9.26	9.39
Commercial	9.14	9.64	9.00
Overall Total	9.29	9.30	9.18
7-10 Rating	% of customer's with a field visit gaving a 7-10 rating.		
Residential	96.6%	95.7%	96.8%
Commercial	98.3%	98.4%	95.7%
Overall Total	97.4%	97.0%	96.2%

The Overall Field Satisfaction rating was slightly less this quarter compared to last quarter and higher than the same quarter last year.

Of the 117 customers that had a Field Visit in the last 6 months, 3 (2.6%) gave a rating < 7.

Newfoundland Power
Customer Satisfaction Survey
SEPTEMBER 2013

SECTION 1: GENERAL SERVICE (gensat)

1. First, I would like to get your opinion of the overall service provided by Newfoundland Power. On a 10 point scale where 1 is "Not at all satisfied" and 10 is "Fully satisfied", how satisfied are you with the overall service provided by Newfoundland Power?

   1 2 3 4 5 6 7 8 9 10

IF RESPONSE IS 6 OR LESS GO TO QUESTION 2, ELSE GO TO QUESTION 3.

---

2. Can you tell me the main reason why you gave a rating of _____? (Bring answer from Q1) (gensatwy)

3. I would like to read you a few statements that could describe Newfoundland Power's service. For each I would like you to tell me if you agree or disagree with the statement**.**

5 = Strongly Agree, 4 = Somewhat Agree, 3 = Neither, 2 = Somewhat Disagree, 1= Strongly Disagree

3_1 The power supply is reliable. (agreerd)

3_2 Newfoundland Power's billing is accurate. (agreacbl)

3_3 Newfoundland Power is easy to contact when you needed service or information. (agrecont)

3_4 Newfoundland Power operates in an environmentally responsible manner. (agreenvr)

3_5 Newfoundland Power shows concern for public safety. (agreesaf)

3_6 Newfoundland Power contributes to the community. (agrecomm)

3_7 Newfoundland Power's electricity bill is easy to read and understand. (agreebil)

3_8 Newfoundland Power provides high quality customer service. (agrehqcs)

3_9 Newfoundland Power encourages consumers to make more efficient use of electricity. (agreeffc)

3_10 Newfoundland Power has friendly and courteous staff. (agrefrnd)

4. Now I would like to read you 7 items and I would like you to tell me which 3 are the most important to you ranked by their importance. The 7 items are…

4_1 ___ Reliability and dependability of power with few outages. (imprrd)

4_2 ___ Price of electricity. (imprtprc)

4_3 ___ Friendly and knowledgeable staff. (imprtkwl)

4_4 ___ Company is community-oriented.. is involved in the community. (imprtcom)

4_5 ___ Company is committed to the safety of its employees and the public. (imprtsaf)

4_6 ___ Company encourages the wise and efficient use of electricity. (imprteff)

4_7 ___ Company operates in an environmentally responsible manner. (imprtenv)

SECTION 2: CONTACT CENTRE SERVICE

4. Have you called Newfoundland Power within the past six months? (callast6)

    1. Yes **(Continue at Q5)**
    2. No **(Skip to Q12)**
    3. Don't know **(Skip to Q12)**

5. Overall, on a scale of 1 to 10, where 1 is "Not at all satisfied" and 10 is "Fully satisfied", how satisfied are you in general with the service you receive by phone from Newfoundland Power's. (phnsat)

    1 2 3 4 5 6 7 8 9 10

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION6, ELSE SKIP TO Q7

6. Can you tell me the main reason why you gave a rating of _____? (phsatwhy)

7. Did you speak to a Customer Account Representative or did you call to get your account balance using the recorded telephone system, or did you call for recorded power outage information? (whatcald)

    1. Customer Account Representative **(Continue at Q8)**
    2. Automated Account System **(Skip to Q12)**
    3. Automated power outage information system **(Skip to Q12)**

8. What was the main reason for your recent call to Newfoundland Power?

DO NOT READ LIST. PROMPT IF NECESSARY. ACCEPT ALL APPROPRIATE RESPONSES. (Check boxes for multiple responses)

1. Account Maintenance (whycall1)
(New account hookup, moving to new address, closing an account, change of address, change of contact information etc.)

2. Billing (whycall2)
(billing adjustment, sign up for ebills or Equal payment plan or Automatic Payment Plan, as about payment locations, ask a question about the bill)

3. Meter Reading (whycall4)
(Inquiry about a meter reading estimate, to provide a meter reading, to ask about access to meter or a meter change out)

4. Energy Management (whycal58)
(To ask how to reduce energy usage, find out about programs and rebates for thermostats or insulation, to ask for energy efficiency advise)

5. Credit (whycall3)
(Find out balance owing on account, customers who are disconnected, customer who are in collection status and need to make payment arrangements)

6. Technical and Field work (whycl791)
(Inquiry about tree trimming, inquiry about a cabin hookup or powerline extensions, calls looking for a technician or is expecting a field visit from a technician or linesperson.)

7. Outage Management (whycl611)
(Outage information, report an outage, report a power emergency, report a damaged or non--working streetlight)

(whycloth) **(whycltxt)**

IF 5, or 7 WAS CHECKED, SKIP TO QUESTION 12, ELSE CONTINUE QUESTION 9

9. Did the Newfoundland Power representative complete your request or resolve your issue the first time you called the Contact Centre? (firstme)

   1. Yes **(Skip to Q12)**
   2. No **(Continue at Q10)**

10. How many times did you call Newfoundland Power to get your request completed or your issue resolved? (hwmnytme)

    1 Two times
    2 Three times

3 More than three times

11. Can you tell me why you had to call more than once to have this issue resolved? (whymore)

Text box for 250 characters

SECTION 4: FIELD SERVICE

12. Have any of the following field representatives visited your home/business in the past six months? (whovisit)

1. Customer Service Specialist (Continue at Question 13)
2. Lineperson (Continue at Question 13)
3. Technician (Continue at Question 13)
4. Meter Person, NOT the Meter Reader (Continue at Question 13)
5. Collector (Skip to Question 17)
6. None of the above **(Do not read) If "None of the above", skip to Q17**

13. Overall, on a scale of 1 to 10, where 1 is "Not at all satisfied" and 10 is "Fully satisfied", how would you rate the quality of service provided by the field representative who spoke with you? (ratevist)

1 2 3 4 5 6 7 8 9 10

IF RESPONSE IS 6 OR LESS, GO TO QUESTION 14, ELSE GO TO QUESTION 17

14. Can you tell me the main reason why you gave a rating of _____? (whyrtvst)

Ductless Mini-Split Heat Pump Awareness Survey
(Residential Customers Only)
MQO Revised Questions – September 6, 2013

Now I would like to ask you some questions about ductless mini-split heat pumps. A ductless mini-split heat pump system consists of an outdoor unit with up to four indoor wall mounted units. The system can provide energy efficient heating and air conditioning to all or just part of your home and does not require the installation of ducts.

1) Before this survey, have you ever heard of ductless mini-split heat pumps?
   a) Yes **Continue**
   b) No **Go to Q3**
   c) Don't Know (Volunteered) **Go to Q3**

2) How familiar are you with ductless mini-split heat pumps? Would you say you are______ with them?
   a) Not very familiar
   b) Somewhat familiar, or
   c) Very familiar

3) In addition to providing air conditioning, ductless mini-split heat pumps can reduce the cost to heat your home during the colder months of the year. If the system would pay for itself in five years by reducing your heating bills how likely would you be to consider purchasing a mini-split heat pump? Would you be…
   a) Very unlikely
   b) Somewhat unlikely
   c) Neither likely nor unlikely [Volunteered]
   d) Somewhat likely, or
   e) Very likely

   f) Depends [Volunteered]
   g) Don't Know [Volunteered]

17. Gender of respondent (gender)
   1. Male
   2. Female

(age) (area) (type)

THANK YOU VERY MUCH FOR YOUR HELP.

Q3 2013 Customer Satisfaction Survey (Transactional)

2013 Q3
Customer Satisfaction
Transactional Survey Results

Transactional Survey Results

SELECT HIGHLIGHTS

Methodology

- Larger sample size (1752 vs. 1200 in the regular Q3 Tracking survey)

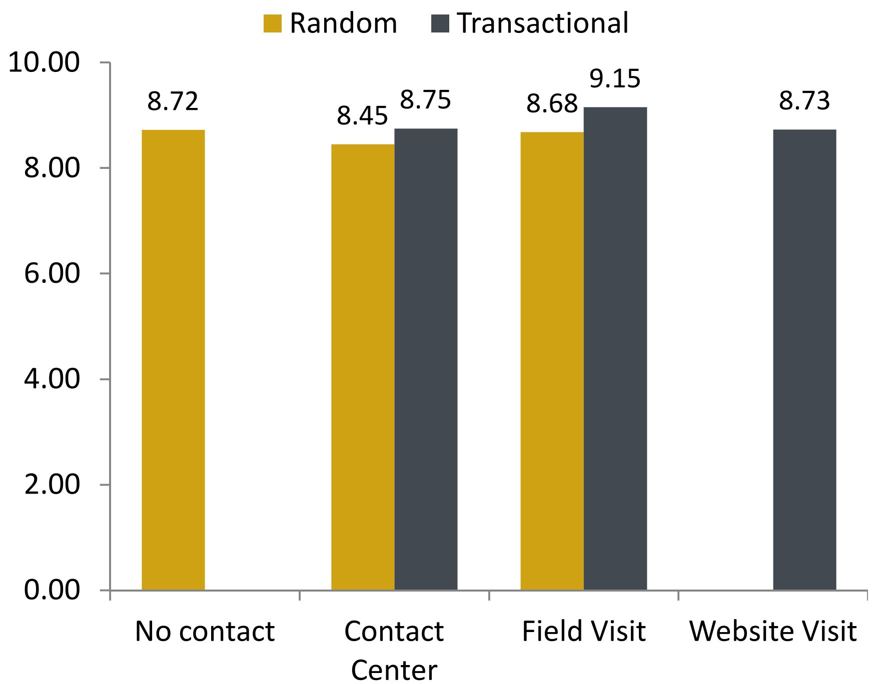
	Total	Contact Center	Field Visit	Website Visit
Residential	1384	501	126	757
Business	368	300	43	25
Total	1752	801	169	782

- Customers selected from those having a transaction in the month compared to a random selection of customers
- Data collected monthly compared to once per quarter in regular tracking
- All asked to rate overall service of Newfoundland Power (Gensat) and quality of service provided during 3 transaction types – contact center call, field visit and website visit

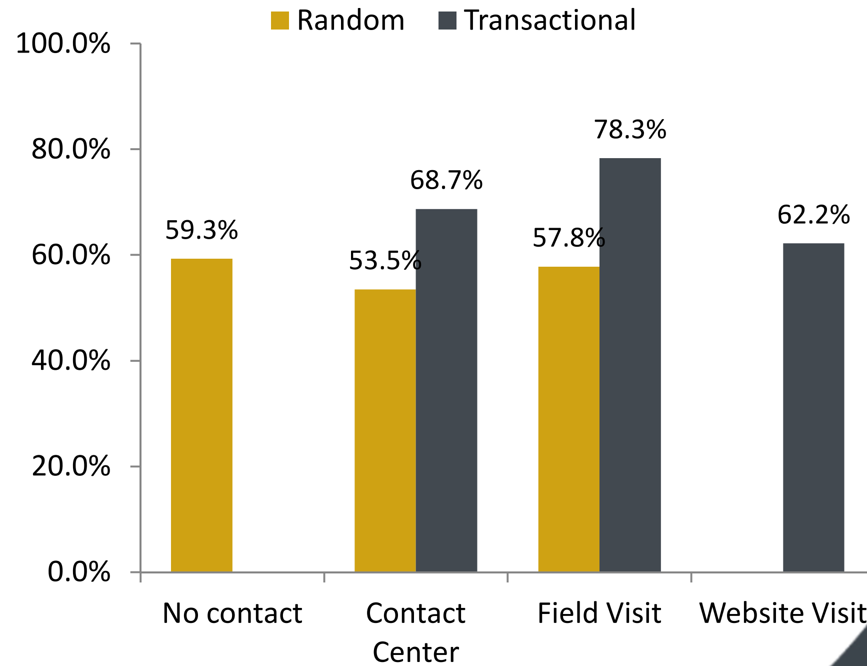
Satisfaction with NF Power Service

- Customers who have had a recent transaction with you, rate Newfoundland Power's overall service higher than those who recall having a transaction within the past 6 months

Means: Random vs. Transactional Survey

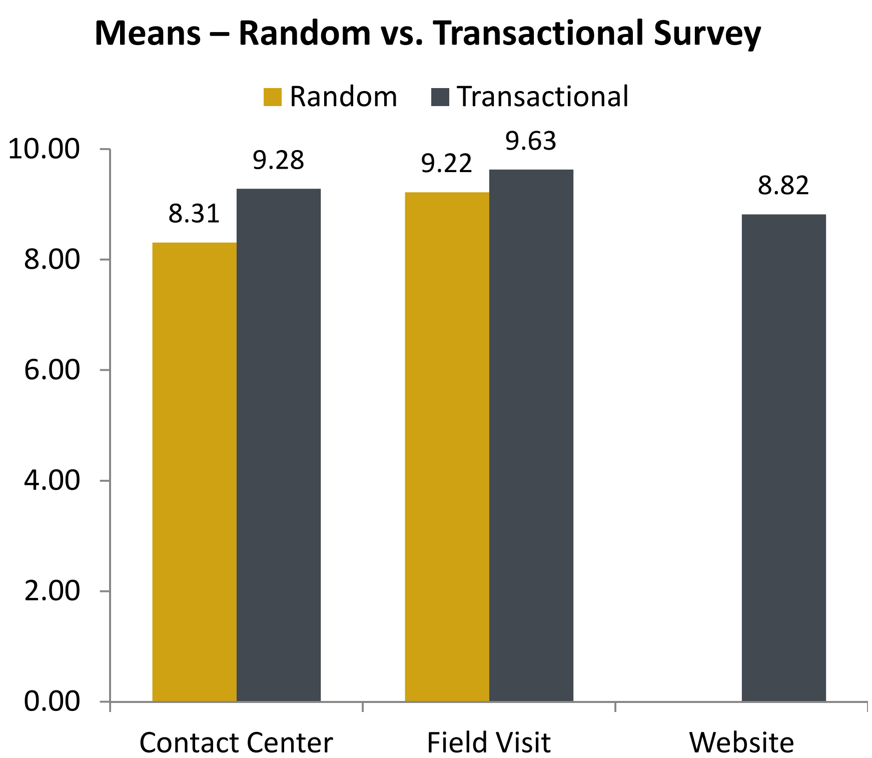


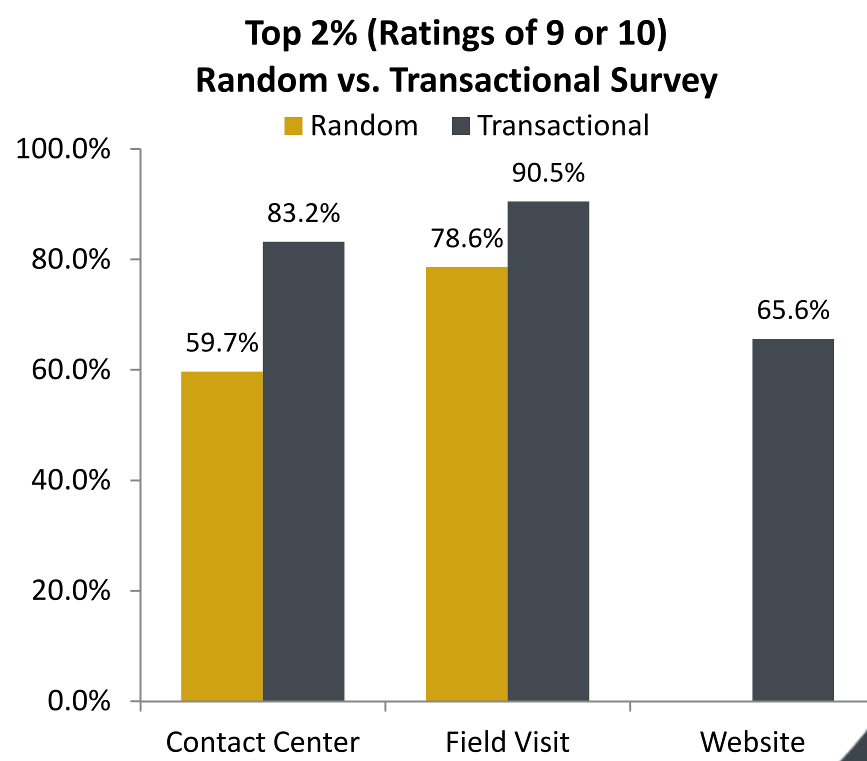
Top 2% (Ratings of 9 or 10)
Random vs. Transactional Survey



Satisfaction with Specific Services

- Once customers were more focused on a recent transaction, ratings were relatively higher than among customers recalling experiences within the past 6 months.





Newfoundland Power
Customer Satisfaction Transactional Surveys
-Contact Centre-
Final Pretest Version: Last Updated August 29, 2013

Hello, my name is ______ and I am calling from MQO Research, a Newfoundland-based research company. We are calling today/tonight on behalf of Newfoundland Power to conduct a short survey on customer satisfaction related to....

CONTACT CENTRE:
...a call made by you or someone in your <household/business or organization> to Newfoundland Power during the past month or so.

May I speak with **<Recall name and business name (as appropriate) from sample>**

RESIDENTIAL INTRO: **IF NO NAME IS PROVIDED:** May I speak with the person in your household who would have made the call? Depending on your responses the survey will take about 5-7 minutes to complete.

BUSINESS INTRO: **IF NO NAME IS PROVIDED:** May I speak with the person in your business/organization who made the call and is responsible for interacting with Newfoundland Power on behalf of your business or organization? Depending on your responses the survey will take about 5-7 minutes to complete.

Do you have a few minutes to answer my questions? Please be assured that all your responses will be kept strictly confidential.

IF NEW PERSON COMES ON THE LINE: REPEAT INTRODUCTION

Yes .... 1 **CONTINUE**
No .... 2 Is there a more convenient time for me to call back? ARRANGE FOR A CALLBACK OR THANK AND TERMINATE.

IF RESPONDENT AGREES TO CONTINUE, ADD: This call may be monitored for quality purposes.

If necessary: The purpose of this call is not to sell you anything.*

Continue...	1	
No..	2	*Thank & Terminate*
No, not available	3	*Arrange a call back*
No, someone else............................	4	*Identify and Restart*

IF NOT AVAILABLE, ARRANGE FOR A CALLBACK.

VALIDITY RESPONSE:
If a respondent questions the validity of the survey, the call or our organization please state:

MQO Research has been conducting research studies in Canada and abroad for 30 years. We are a Member of the Canadian Marketing Research AND Intelligence Association (MRIA) which is responsible for regulating marketing research practices in Canada. MQO Research adheres very strictly to all guidelines of professionalism and privacy as outlined by the MRIA. This study is registered with the Association. If you would like to contact the MRIA to verify the legitimacy of this research study or our company please call 1-800-554-9996 toll free and reference survey Number: **0584.**

CONFIDENTIALITY RESPONSE:
If a respondent questions **the confidentiality** of the information that they are providing please state the following:

As a Corporate Gold Seal member of the Marketing Research Intelligence Association (MRIA) we adhere to strict standards of privacy and confidentiality. Our data is always grouped. Information will never be released to our client or any other third party in a manner that could be used to disclose your identity.

CONTACT INFORMATION RESPONSE:
If a respondent questions how MQO got their contact information please state the following:
As part of its on-going commitment to customer satisfaction, Newfoundland Power has provided MQO Research with a list of customers who had a transaction with the company over the past 3 months for the purpose of this survey. You were selected at random to participate in this survey. MQO follows the Marketing Research Intelligence Association's (MRIA's) strict privacy and protection of customer information guidelines, based on ensuring compliance with federal and provincial governments' privacy legislation.

If Necessary:
If respondent wishes to confirm the validity of the survey with Newfoundland Power provide them with the following contact information: If you would like to confirm the validity of the survey with Newfoundland Power, you can call **709-737-2802 locally or 1-800-663-2802 toll-free** and speak to an employee of Newfoundland Power.
[NOTE: Call centre at NF Power is open during regular business hours Monday to Friday 8:00 am to 5:00 pm]

<u>**Screening and Confirmation Questions:**</u>

S1. Do you, or anyone in your household currently work for NF Power?

Yes	1	**Thank and Terminate**
No	2	**Continue**

CONTACT CENTRE:

S2. According to information provided to us, you placed a call to Newfoundland Power on **<RECALL DATE>**. Is this correct?

Yes	1	**Continue**
No	2	**Thank and Terminate**

Section 1: General Service

1. First, I would like to get your opinion of the overall service provided by Newfoundland Power. On a 10 point scale where 1 is "Not at all satisfied" and 10 is "Fully satisfied", how satisfied are you with the overall service provided by Newfoundland Power? (gensat)

   1 2 3 4 5 6 7 8 9 10

   IF RESPONSE IS 6 OR LESS GO TO QUESTION 2, ELSE GO TO QUESTION 3.

2. Can you tell me the main reason why you gave a rating of _____**<Recall from Q1>?** (gensatwy)

Section 2: Contact Centre Service

3. ***[Programming note: Recall "wrap group" and "wrap description to screen ie. Recorded reason for call]*** On **<RECALL DATE**>, what was the main reason for your call to Newfoundland Power?

   DO NOT READ LIST. PROMPT IF NECESSARY. ACCEPT ALL APPROPRIATE RESPONSES. (Check boxes for multiple responses)

   1. Account Maintenance (whycall1)
   (New account hookup, moving to new address, closing an account, change of address, change of contact information etc.)
   2. Billing (whycall2)
   (billing adjustment, sign up for ebills or Equal payment plan or Automatic Payment Plan, ask about payment locations, ask a question about the bill)
   3. Meter Reading (whycall4)
   (Inquiry about a meter reading estimate, to provide a meter reading, to ask about access to meter or a meter change out)
   4. Energy Management (whycal58)
   (To ask how to reduce energy usage, find out about programs and rebates for thermostats, insulation or windows, to ask for energy efficiency advise)
   5. Credit (whycall3)
   (Find out balance owing on account, customers who are disconnected, customer who are in collection status and need to make payment arrangements)
   6. Technical and Field work (whycl791)
   (Inquiry about tree trimming, inquiry about a cabin hookup or powerline extensions, calls looking for a technician or is expecting a field visit from a technician or linesperson.)
   7. Outage Management (whycl611)
   (Outage information, report an outage, report a power emergency, report a damaged or non-working streetlight)
   8. Other (specify) (whycloth) (whycltxt)

REPRESENTATIVE(S)

4. Now, thinking about the Newfoundland Power representative(s) you spoke with on the phone, how would you rate your satisfaction towards the employee(s) who handled your call in terms of:

INTERVIEWER: If spoke to more than 1 employee, use the plural form

**If respondent talks about on-site visits by technicians, probe:* But if you consider only the part handled over the telephone to make your request, how satisfied are you with the representative you dealt with in terms of?*

**If respondent comments about satisfied with some but not others, probe:* But, overall, considering all of the representatives you dealt with to make your request, how satisfied were you with them in overall?*

Random order

a)	Being courteous and polite	(1-10) NA/DK-99
b)	Being respectful	(1-10) NA/DK-99
c)	Making you feel like a valued customer	(1-10) NA/DK-99
d)	taking the necessary time to understand your needs	(1-10) NA/DK – 99
e)	providing thorough and accurate information in response to your questions	(1-10) NA/DK – 99

5. Now, considering all the aspects we just mentioned as well as anything else you might think of, **overall** how satisfied were you with the quality of service provided by the Newfoundland Power representative(s) you dealt with on this call?

INTERVIEWER: If spoke with more than one employee, use the plural form

**If respondent starts to comment about satisfied with some but not others, probe:* *But, overall, considering all of the representatives you dealt with to make your request, how satisfied were you with them overall?*

______.................................... (1-10)
NA / DK.................................. 99 *Go to Q7*

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION 6, ELSE SKIP TO Q7

6. Can you tell me the main reason why you gave a rating of _____<**Recall from Q5**>

7. How satisfied would you be to speak with this/these representative(s) again during your next telephone inquiry? **[Interviewer – repeat scale as necessary, 1 means "not at all satisfied" and 10 means "fully satisfied"]**

1 2 3 4 5 6 7 8 9 10 Don't Know

8. On a scale of 1-10, how satisfied were you with the time you had to wait before you were able to speak with a representative?

1 2 3 4 5 6 7 8 9 10 Don't Know

9. Did the Newfoundland Power representative(s) complete your request or resolve your issue the first time you called?

1. Yes **(Skip to Question 11)**
2. No **(Continue at Question 10)**

10. Can you tell me why you had to call more than once to have this issue resolved?

Section 3: Other Forms of Customer Service

<u>Automated Power Outages System</u>

11. During the past month, have you called Newfoundland Power's Power Outages & Emergencies line?

[Interviewer, if required: the number is 737-5711 or toll free 1-800-474-5711]

1. Yes **(Continue to Question 12)**
2. No **(Go to question 13)**

12. Now, thinking about the time(s) that you called this telephone line, how would you rate your satisfaction in terms of:

a) Your ability to get the information you were seeking (1-10) NA/DK-99
b) Timeliness of updates (1-10) NA/DK-99

<u>Other Methods of Contact</u>

13. Did you use any of the following methods to contact Newfoundland Power within the past month?

Read List	**Yes**	**No**	**DK**
a) E-mail	1	2	9
b) Visit(s) to the newfoundlandpower.com website	1	2	9
c) Social Media such as Twitter/Face Book or LinkedIn	1	2	9
d) In-person	1	2	9

14. **For each mention in Q13a-d above:** How satisfied were you with your **<Recall from Q13>** method of contact? **[*Interviewer – repeat scale as necessary]***

1	2	3	4	5	6	7	8	9	10	Don't Know

Section 4: Website Services

[Check: IF Q13b website=yes, continue; otherwise go to Demographics]

15. How often do you visit newfoundlandpower.com per month?
    1-2 times
    3-5 times
    5-10 times
    more than 10 times
    Don't Know

16. What was the main reason for your visit(s) to newfoundlandpower.com during the last month? Were there any other reasons?

DO NOT READ LIST. RECORD Main and Other Reasons separately

	MAIN	**OTHER**
To get information on my bill	01	1
To change account information	02	1
To fill out forms	03	1
To get information on power outage	04	1
To review my usage history	05	1
To get phone number to call customer service	06	1
Other (specify) ____________________________		

17. Now, thinking about your visit(s) to newfoundlandpower.com during the past month, were you:

a) able to complete everything you wanted to do online, without having to call Newfoundland Power? YES/NO/NA_DK-99

a_1) **If Yes in 17a,** were you able to complete your request or find your information easily? YES/NO/NA_DK-99

a_2) **If No in 17a**, what else would you like to have done or what did you have to call about? (Specify)

b) If your inquiry required a response, did you receive one in a timely manner? YES/NO/NA_DK-99

18. Overall, on a scale from 1 to 10, where 1 is not at all satisfied and 10 is fully satisfied, how satisfied are you with newfoundlandpower.com ?

1 2 3 4 5 6 7 8 9 10

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION 19, ELSE SKIP TO Q20

19. Can you tell me the main reason why you gave a rating of _____? <**Recall from Q18**>

20. What, if anything, would you like to see or be able to do on newfoundlandpower.com?

Section 5: Demographic Information

D1. OBSERVE Gender of respondent (gender)

1. Male
2. Female

D2. Would you mind telling me into which of the following categories your age falls? (age)

1. 18 to 34
2. 35 to 49
3. 50 to 64
4. 65 or older

99 Refused (VOL)

D3. What is your Postal Code?

1) __________
2) Don't Know
3) Prefer Not to say

That is the end of my questions.

THANK YOU VERY MUCH FOR YOUR HELP TODAY.

S1: Do you, or anyone in your household currently work for NF Power?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	801	300	501
No	100%	100%	100%

S2: According to information provided to us, you placed a call to Newfoundland Power on <RECALL DATE>. Is this correct?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	801	300	501
Yes	69%	67%	69%
Recall call but not date	31%	33%	31%

Q1: How satisfied are you with the overall service provided by Newfoundland Power?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	801	300	501
1 - Not at all satisfied	3%	4%	3%
2	1%	1%	1%
3	1%	1%	1%
4	0%	1%	0%
5	3%	3%	3%
6	2%	1%	2%
7	5%	7%	5%
8	16%	20%	16%
9	12%	16%	12%
10 - Fully satisfied	57%	45%	57%
Don't know (VOL)	0%	1%	0%
% 9 or higher	69%	61%	69%
Mean	8.8	8.5	8.8

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q2: Can you tell me the main reason why you gave a rating of ___?
SUBSET: If rating is 6 or less.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	85	33	52
Customer Service Issues	57%	82%	56%
Billing / Meter Reading / Accuracy	32%	21%	33%
Price	13%	3%	13%
Reliability / Power Outages	6%	3%	6%
Miscellaneous Mention	4%	3%	4%
Don't know (VOL)	4%	0%	4%
No Opinion	0%	3%	0%

Q3: On <RECALL DATE>, what was the main reason for your call to Newfoundland Power?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	801	300	501
Billing	34%	25%	34%
Account Maintenance	25%	24%	25%
Credit	16%	9%	16%
Technical and Field work	11%	23%	10%
Other	8%	2%	8%
Outage Management	5%	10%	5%
Meter Reading	3%	5%	3%
Don't know (VOL)	3%	6%	3%
Energy Management	1%	2%	1%
Refused (VOL)	0%	0%	0%

Q4: Now, thinking about the Newfoundland Power representative(s) you spoke with on the phone, how would you rate your satisfaction towards the employee(s) who handled your call in terms of:

		Total	Type	
			Commercial	Residential
Total Unweighted (n)		801	300	501
Being courteous and polite	1 - Not at all satisfied	0%	1%	0%
	2	0%	0%	0%
	4	0%	0%	0%
	5	1%	0%	1%
	6	1%	0%	1%
	7	2%	2%	2%
	8	7%	8%	7%
	9	9%	16%	8%
	10 - Fully satisfied	79%	71%	80%
	Don't know	1%	0%	1%
Being respectful	1 - Not at all satisfied	0%	0%	0%
	2	0%	0%	0%
	3	0%	0%	0%
	4	0%	1%	0%
	5	1%	0%	1%
	6	0%	1%	0%
	7	2%	2%	2%
	8	7%	9%	7%
	9	9%	15%	9%
	10 - Fully satisfied	78%	71%	79%
	Don't know	1%	0%	1%
Making you feel like a valued customer	1 - Not at all satisfied	2%	2%	2%
	2	0%	0%	0%
	3	0%	1%	0%
	4	1%	0%	1%
	5	2%	2%	2%
	6	2%	2%	2%
	7	2%	4%	2%
	8	10%	12%	10%
	9	8%	12%	7%
	10 - Fully satisfied	72%	63%	72%
	Don't know	2%	1%	2%

taking the necessary time to understand your needs	1 - Not at all satisfied	1%	1%	1%
	2	1%	0%	1%
	3	1%	1%	1%
	5	1%	1%	1%
	6	1%	1%	1%
	7	3%	4%	3%
	8	7%	11%	7%
	9	9%	14%	8%
	10 - Fully satisfied	74%	66%	74%
	Don't know	1%	1%	1%
providing thorough and accurate information in response to your questions	1 - Not at all satisfied	2%	2%	2%
	2	0%	0%	0%
	3	0%	0%	0%
	4	0%	0%	0%
	5	1%	3%	1%
	6	1%	3%	1%
	7	3%	5%	3%
	8	9%	12%	9%
	9	9%	12%	9%
	10 - Fully satisfied	71%	58%	72%
	Don't know	2%	3%	2%

Q4: Now, thinking about the Newfoundland Power representative(s) you spoke with on the phone, how would you rate your satisfaction towards the employee(s) who handled your call in terms of: % 9 or higher

	Total	Type	
		Commercial	Residential
Being courteous and polite	89%	88%	89%
Being respectful	89%	87%	89%
Making you feel like a valued customer	81%	76%	81%
taking the necessary time to understand your needs	84%	81%	84%
providing thorough and accurate information in response to your questions	82%	73%	82%

Refusals and Don't knows have been excluded.

Q4: Now, thinking about the Newfoundland Power representative(s) you spoke with on the phone, how would you rate your satisfaction towards the employee(s) who handled your call in terms of: Mean Values

		Total	Type	
			Commercial	Residential
Being courteous and polite	N	796	299	497
	Mean	9.6	9.5	9.6
Being respectful	N	795	299	496
	Mean	9.6	9.5	9.6
Making you feel like a valued customer	N	788	296	492
	Mean	9.2	9.0	9.2
taking the necessary time to understand your needs	N	792	298	494
	Mean	9.3	9.2	9.3
providing thorough and accurate information in response to your questions	N	782	291	491
	Mean	9.3	8.9	9.3

Q5: Now, considering all the aspects we just mentioned as well as anything else you might think of, overall how satisfied were you with the quality of service provided by the NL Power representative(s) you dealt with on this call?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	801	300	501
1 - Not at all satisfied	2%	1%	2%
2	0%	0%	0%
3	1%	0%	1%
4	0%	0%	0%
5	2%	2%	2%
6	1%	1%	1%
7	3%	4%	3%
8	8%	13%	8%
9	10%	13%	10%
10 - Fully satisfied	72%	65%	73%
Don't know (VOL)	1%	0%	1%
% 9 or higher	83%	78%	83%
Mean	9.3	9.2	9.3

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

**Q6: Can you tell me the main reason why you gave a rating of _____?
SUBSET: If rating is 6 or less.**

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	42	14	28
Other (Please Specify)	52%	6%	54%
Not satisfied with information given	19%	42%	18%
Poor Customer service	12%	43%	11%
Field work not completed in expected time	11%	7%	11%
No follow-up / Call not returned	7%	14%	7%
Miscellaneous Mention	7%	0%	7%
Don't know (VOL)	3%	0%	4%

Q7: How satisfied would you be to speak with this/these representative(s) again during your next telephone inquiry?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	801	300	501
1 - Not at all satisfied	2%	1%	2%
3	0%	0%	0%
4	1%	0%	1%
5	0%	1%	0%
6	0%	0%	0%
7	2%	4%	2%
8	7%	7%	7%
9	7%	14%	7%
10 - Fully satisfied	79%	71%	79%
Don't know (VOL)	2%	2%	2%
% 9 or higher	88%	87%	88%
Mean	9.5	9.4	9.5

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q8: On a scale of 1-10, how satisfied were you with the time you had to wait before you were able to speak with a representative?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	801	300	501
1 - Not at all satisfied	0%	1%	0%
2	0%	0%	0%
3	0%	1%	0%
4	1%	1%	1%
5	2%	3%	2%
6	3%	2%	3%
7	6%	8%	6%
8	17%	17%	17%
9	14%	14%	14%
10 - Fully satisfied	52%	44%	52%
Don't know (VOL)	4%	10%	4%
% 9 or higher	69%	64%	69%
Mean	9.0	8.7	9.0

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q9: Did the Newfoundland Power representative(s) complete your request or resolve your issue the first time you called?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	801	300	501
Yes	85%	78%	85%
No	14%	19%	14%
Don't know (VOL)	1%	3%	1%

Q10: Can you tell me why you had to call more than once to have this issue resolved?
SUBSET: If request/issue wasn't resolved in one call.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	126	56	70
Other (Please Specify)	54%	25%	56%
Not getting information required	15%	25%	14%
Can't resolve energy usage issue	11%	6%	11%
Miscellaneous Mention	7%	11%	7%
Field work not completed in expected time	5%	22%	4%
Call not returned/ no follow-up	5%	15%	4%
Don't know (VOL)	3%	4%	3%

Q11: During the past month, have you called Newfoundland Power's Power Outages & Emergencies line?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	801	300	501
Yes	5%	4%	5%
No	95%	94%	95%
Don't know (VOL)	0%	2%	0%

Q12: Now, thinking about the time(s) that you called this telephone line, how would you rate your satisfaction in terms of:
SUBSET: Those who called NL Power's Power Outages & Emergencies line.

		Total	Type	
			Commercial	Residential
Total Unweighted (n)		37	13	24
Your ability to get the information you were seeking	5	4%	0%	4%
	6	4%	8%	4%
	7	8%	8%	8%
	8	13%	23%	12%
	9	0%	8%	0%
	10 - Fully satisfied	70%	53%	71%
Timeliness of updates	3	0%	8%	0%
	4	4%	0%	4%
	5	4%	0%	4%
	7	9%	16%	8%
	8	8%	7%	8%
	9	9%	15%	8%
	10 - Fully satisfied	62%	38%	63%
	Don't know	5%	17%	4%

Q12: Now, thinking about the time(s) that you called this telephone line, how would you rate your satisfaction in terms of:
% 9 or higher
SUBSET: Those who called NL Power's Power Outages & Emergencies line.

	Total	Type	
		Commercial	Residential
Your ability to get the information you were seeking	70%	61%	71%
Timeliness of updates	74%	63%	74%

Refusals and Don't knows have been excluded.

Q12: Now, thinking about the time(s) that you called this telephone line, how would you rate your satisfaction in terms of:
SUBSET: Those who called NL Power's Power Outages & Emergencies line.
Mean Values

		Total	Type	
			Commercial	Residential
Your ability to get the information you were seeking	N	37	13	24
	Mean	9.1	8.9	9.1
Timeliness of updates	N	34	11	23
	Mean	9.0	8.4	9.0

Q13: Did you use any of the following methods to contact Newfoundland Power within the past month?

		Total	Type	
			Commercial	Residential
Total Unweighted (n)		801	300	501
E-mail	Yes	4%	14%	4%
	No	96%	85%	96%
	Refused	0%	0%	0%
	Don't know	0%	1%	0%
Visit(s) to the newfoundlandpower.com website	Yes	9%	15%	9%
	No	90%	84%	91%
	Refused	0%	0%	0%
	Don't know	0%	1%	0%
Social Media	Yes	0%	0%	0%
	No	100%	99%	100%
	Refused	0%	0%	0%
	Don't know	0%	1%	0%
In-person	Yes	7%	12%	7%
	No	93%	87%	93%
	Refused	0%	0%	0%
	Don't know	0%	1%	0%

**Q14: How satisfied were you with following method(s) of contact?
SUBSET: Those who use these methods.**

		Total	Type	
			Commercial	Residential
Total (n)		58	40	18
E-mail	1 - Not at all satisfied	9%	0%	11%
	4	0%	2%	0%
	5	1%	8%	0%
	6	0%	2%	0%
	7	7%	13%	6%
	8	6%	8%	6%
	9	7%	17%	6%
	10 - Fully satisfied	69%	50%	72%
Total (n)		90	44	46
Visit(s) to the newfoundlandpower.com website	1 - Not at all satisfied	0%	2%	0%
	5	4%	2%	4%
	7	5%	9%	4%
	8	12%	20%	11%
	9	11%	16%	11%
	10 - Fully satisfied	68%	50%	70%
Total (n)		3	1	2
Social Media	10 - Fully satisfied	100%	100%	100%
Total (n)		70	36	34
In-person	5	3%	6%	3%
	7	6%	3%	6%
	8	9%	11%	9%
	9	4%	14%	3%
	10 - Fully satisfied	78%	64%	79%
	Don't know	0%	3%	0%

**Q14: How satisfied were you with following method(s) of contact?
SUBSET: Those who use these methods.
% 9 or higher**

	Total	Type	
		Commercial	Residential
E-mail	76%	67%	78%
Visit(s) to the newfoundlandpower.com website	79%	66%	80%
Social Media	100%	100%	100%
In-person	82%	80%	82%

Refusals and Don't knows have been excluded.

**Q14: How satisfied were you with following method(s) of contact?
SUBSET: Those who use these methods.
Mean Values**

		Total	Type	
			Commercial	Residential
E-mail	N	58	40	18
	Mean	8.7	8.7	8.7
Visit(s) to the newfoundlandpower.com website	N	90	44	46
	Mean	9.3	8.8	9.3
Social Media	N	3	1	2
	Mean	10.0	10.0	10.0
In-person	N	69	35	34
	Mean	9.5	9.3	9.5

**Q15: How often do you visit newfoundlandpower.com per month?
SUBSET: Those who visit newfoundlandpower.com.**

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	90	44	46
Less than once per month	28%	50%	26%
1-2 times	69%	36%	72%
3-5 times	3%	7%	2%
More than 10 times	0%	5%	0%
Don't know (VOL)	0%	2%	0%

Q16a: What was the main reason for your visit(s) to newfoundlandpower.com during the last month? Were there any other reasons?
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	90	44	46
To get information on my bill	61%	37%	63%
To change account information	4%	2%	4%
To fill out forms	2%	4%	2%
To get information on power outage	5%	18%	4%
To get phone number to call customer service	5%	12%	4%
Other (Please Specify)	22%	22%	22%
Don't know (VOL)	0%	2%	0%

Q16b: Were any other reasons?
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	89	43	46
No other reason (VOL)	77%	91%	76%
Don't know (VOL)	10%	0%	11%
Other (Please Specify)	4%	4%	4%
To change account information	4%	0%	4%
To get information on power outage	2%	2%	2%
To get information on my bill	2%	0%	2%
To review my usage history	0%	2%	0%

Q16a/Q16b combined:
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	90	44	46
To get information on my bill	63%	37%	65%
Other (Please Specify)	26%	27%	26%
To change account information	8%	2%	9%
To get information on power outage	8%	21%	7%
To get phone number to call customer service	5%	12%	4%
To fill out forms	2%	4%	2%
To review my usage history	0%	2%	0%
Don't know (VOL)	0%	2%	0%

Q17a: Now, thinking about your visit(s) to newfoundlandpower.com during the past month, were you able to complete everything you wanted to do online, without having to call Newfoundland Power?
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	90	44	46
Yes	84%	74%	85%
No	16%	24%	15%
Don't know (VOL)	0%	2%	0%

Q17a1: Were you able to complete your request or find your information easily?
SUBSET: Those who completed everything online.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	71	32	39
Yes	100%	100%	100%

Q17a2: What else would you like to have done or what did you have to call about?
SUBSET: Those who were not able to complete everything online.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	19	12	7
Other (Please Specify)	99%	92%	100%
Don't know (VOL)	1%	8%	0%

Q17c: If your inquiry required a response, did you receive one in a timely manner?
SUBSET: Those who visit newfoundlandpower.com and required a response.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	59	35	24
Yes	80%	53%	83%
No	1%	6%	0%
Don't know (VOL)	19%	41%	17%

Q18: Overall, on a scale from 1 to 10, where 1 is not at all satisfied and 10 is fully satisfied, how satisfied are you with newfoundlandpower.com?
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	90	44	46
1 - Not at all satisfied	0%	2%	0%
4	2%	0%	2%
5	2%	2%	2%
6	2%	0%	2%
7	7%	7%	7%
8	9%	14%	9%
9	14%	22%	13%
10 - Fully satisfied	64%	52%	65%
% 9 or higher	78%	74%	78%
Mean	9.2	9.0	9.2

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q19: Can you tell me the main reason why you gave a rating of _____?
SUBSET: If rating is 6 or less.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	5	2	3
Other (Please Specify)	100%	100%	100%

Q20: What, if anything, would you like to see or be able to do on newfoundlandpower.com?
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	90	44	46
Nothing (VOL)	56%	71%	54%
Other (Please Specify)	34%	23%	35%
Don't know (VOL)	11%	6%	11%

D2: Would you mind telling me into which of the following categories your age falls?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	801	300	501
18 to 34	19%	15%	19%
35 to 49	31%	37%	31%
50 to 64	33%	37%	33%
65 or older	17%	9%	17%
Refused (VOL)	0%	2%	0%

Gender:

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	801	300	501
Male	36%	51%	35%
Female	64%	49%	65%

Newfoundland Power
Customer Satisfaction Transactional Surveys
-Field Visits-

Hello, my name is ______ and I am calling from MQO Research, a Newfoundland-based research company. We are calling today/tonight on behalf of Newfoundland Power to conduct a short survey on customer satisfaction related to....

Field Representative/Technician Visit:
...a recent visit from a Newfoundland Power Field Representative to your <home/business> in the past month or so.

RESIDENTIAL INTRO: May I speak with the person your household who dealt with the Newfoundland Power Field Representative? Depending on your responses the survey will take about 5-7 minutes to complete.

BUSINESS INTRO: May I speak with the person in your business/organization who dealt with the Newfoundland Power Field Representative? Depending on your responses the survey will take about 5-7 minutes to complete.

Do you have a few minutes to answer my questions? Please be assured that all your responses will be kept strictly confidential.

IF NEW PERSON COMES ON THE LINE: REPEAT INTRODUCTION

Yes	1	**CONTINUE**
No	2	Is there a more convenient time for me to call back? ARRANGE FOR A CALLBACK OR THANK AND TERMINATE.

IF RESPONDENT AGREES TO CONTINUE, ADD: This call may be monitored for quality purposes.

If necessary: The purpose of this call is not to sell you anything.*

Continue	1	
No	2	*Thank & Terminate*
No, not available	3	*Arrange a call back*
No, someone else	4	*Identify and Restart*

IF NOT AVAILABLE, ARRANGE FOR A CALLBACK.

VALIDITY RESPONSE:
If a respondent questions the validity of the survey, the call or our organization please state:

MQO Research has been conducting research studies in Canada and abroad for 30 years. We are a Member of the Canadian Marketing Research AND Intelligence Association (MRIA) which is responsible for regulating marketing research practices in Canada. MQO Research adheres very strictly to all guidelines of professionalism and privacy as outlined by the MRIA. This study is registered with the Association. If you would like to contact the MRIA to verify the legitimacy of this research study or our company please call 1-800-554-9996 toll free and reference survey Number: **0584.**

CONFIDENTIALITY RESPONSE:
If a respondent questions **the confidentiality** of the information that they are providing please state the following:

As a Corporate Gold Seal member of the Marketing Research Intelligence Association (MRIA) we adhere to strict standards of privacy and confidentiality. Our data is always grouped. Information will never be released to our client or any other third party in a manner that could be used to disclose your identity.

CONTACT INFORMATION RESPONSE:
If a respondent questions how MQO got their contact information please state the following:
As part of its on-going commitment to customer satisfaction, Newfoundland Power has provided MQO Research with a list of customers who had a transaction with the company over the past 3 months for the purpose of this survey. You were selected at random to participate in this survey. MQO follows the Marketing Research Intelligence Association's (MRIA's) strict privacy and protection of customer information guidelines, based on ensuring compliance with federal and provincial governments' privacy legislation.

If Necessary:
If respondent wishes to confirm the validity of the survey with Newfoundland Power provide them with the following contact information: If you would like to confirm the validity of the survey with Newfoundland Power, you can call **709-737-2802 locally or 1-800-663-2802 toll-free** and speak to an employee of Newfoundland Power.
[NOTE: Call centre at NF Power is open during regular business hours Monday to Friday 8:00 am to 5:00 pm]

<u>**Screening and Confirmation Questions:**</u>

S1. Do you, or anyone in your household currently work for NF Power?

Yes	1	Thank and Terminate
No	2	Continue

FIELD REPRESENTATIVE VISIT:

S2. According to information provided to us, you received a visit from a Newfoundland Power Field Representative on <RECALL DATE>. Is this correct?

Yes	1	Continue
No	2	Thank and Terminate
DK	9	Thank and Terminate

Section 1: General Service

1. First, I would like to get your opinion of the overall service provided by Newfoundland Power. On a 10 point scale where 1 is "Not at all satisfied" and 10 is "Fully satisfied", how satisfied are you with the overall service provided by Newfoundland Power?

1 2 3 4 5 6 7 8 9 10

IF RESPONSE IS 6 OR LESS GO TO QUESTION 2, ELSE GO TO QUESTION 3.

2. Can you tell me the main reason why you gave a rating of _____**<Recall from Q1>?**

Section 2: Field Services

The next series of questions relate to your visit by a Newfoundland Power Field Representative.

3. Did you meet with the Newfoundland Power field representative in person?
   1. Yes **(Go to Q4)**
   2. No **(Continue)**

3b. Even if you did not deal with the Newfoundland Power field representative in person, there are some aspects of the quality of service provided by the representative that you could evaluate. ***(Go to Q4e)***

TECHNICIANS/FIELD REPS

4. Using a scale of 1 to 10, where 1 is "Not at all satisfied" and 10 is "Fully satisfied", how satisfied were you with the quality of service provided by the field representative who came to your <house/business> in terms of …

IF NECESSARY:

**If respondent starts to comment about satisfied with some but not others, probe:* But, overall, considering both / all of the field representatives that came to your location to work on your request, how satisfied were you with them overall, in terms of the following:?*

Go to Demographics if respondent is not able to evaluate field representative

Random order (a-d) and (e-g) as separate groups

a) Being courteous and polite	(1-10) NA/DK-99
b) Being respectful	(1-10) NA/DK-99
c) Making you feel like a valued customer	(1-10) NA/DK-99
d) Being knowledgeable	
e) Keeping you up to date on the status of your work order	(1-10) NA/DK-99
f) Completing the work in a timely manner	(1-10) NA/DK-99
g) Leaving your premises in good condition	(1-10) NA/DK-99
h) Being able to deal with any issue you had	(1-10) NA/DK-99

5. Now, considering all the aspects we just mentioned as well as anything else you might think of, using the same scale, **overall** how satisfied were you with the quality of service provided by the Newfoundland Power **field representative(s)** that came to your <house/business>?
   _______.................................... (1-10)
   NA / DK.................................. 99

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION 5, ELSE SKIP TO Q7

6. Can you tell me the main reason why you gave a rating of _____? <**Recall from Q4**>

7. How satisfied would you be to have this/these field representative(s)/technician(s) visit your <home/business> again should you have another request that required a visit? **[Interviewer – repeat scale as necessary, 1 means "not at all satisfied" and 10 means "fully satisfied"]**

   1 2 3 4 5 6 7 8 9 10 Don't Know

8. On a scale of 1-10, how satisfied were you with the time you had to wait between when you called for your request and when a field representative was able to meet with you to handle your request?

   1 2 3 4 5 6 7 8 9 10 Don't Know

Section 4: Other Forms of Customer Service

<u>Other Methods of Contact</u>

9. Did you use any of the following methods to contact or interact with Newfoundland Power within the past month?

Read List	**Yes**	**No**	**DK**
a) E-mail	1	2	9
b) Visit(s) to the newfoundlandpower.com website	1	2	9
c) Social Media such as Twitter/Face Book or LinkedIn	1	2	9
d) In-person	1	2	9
e) Telephone	1	2	9

10. **For each YES mention in Q10a, c or d above:** How satisfied were you with following method(s) of contact? **[*Interviewer – repeat scale as necessary*]**

   1 2 3 4 5 6 7 8 9 10 Don't Know

Telephone Contact

[Check: IF Q10e: telephone=yes, continue; otherwise go to Q16]:

You mentioned you contacted Newfoundland Power by telephone within the past month.

11. Now, thinking about the Newfoundland Power representative(s) you spoke with on the phone, how would you rate your satisfaction towards the employee(s) who handled your call in terms of:

INTERVIEWER: If spoke to more than 1 employee, use the plural form

**If respondent talks about on-site visits by technicians, probe:* But if you consider only the part handled over the telephone to make your request, how satisfied are you with the representative you dealt with in terms of?*

**If respondent comments about satisfied with some but not others, probe:* But, overall, considering all of the representatives you dealt with to make your request, how satisfied were you with them in overall?*

Random order

a)	Being courteous and polite	(1-10) NA/DK-99
b)	Being respectful	(1-10) NA/DK-99
c)	Making you feel like a valued customer	(1-10) NA/DK-99
d)	taking the necessary time to understand your needs	(1-10) NA/DK – 99
e)	providing thorough and accurate information in response to your questions	(1-10) NA/DK – 99

12. Now, considering all the aspects we just mentioned as well as anything else you might think of, **overall** how satisfied were you with the quality of service provided by the Newfoundland Power representative(s) you dealt with on this call?

INTERVIEWER: If spoke with more than one employee, use the plural form

**If respondent starts to comment about satisfied with some but not others, probe:* *But, overall, considering all of the representatives you dealt with to make your request, how satisfied were you with them overall?*

______.................................... (1-10)
NA / DK.................................. 99 *Go to Q16*

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION 14, ELSE SKIP TO Q16

13. Can you tell me the main reason why you gave a rating of _____<**Recall from Q14**>

Automated system

14. During the last month, did you make a call to the Power Outages & Emergencies number of Newfoundland Power?

    [Interviewer, if required: the number is 737-5711 or toll free 1-800-474-5711]

    1. Yes (Continue to Question 17)
    2. No (Go to Check before Question 18)

15. Now, thinking about the time(s) that you called this telephone line, how would you rate your satisfaction in terms of:

a)	Your ability to get the information you were seeking	(1-10) NA/DK-99
b)	Timeliness of updates	(1-10) NA/DK-99
c)	Ability to easily identify which menu number to press for your inquiry	(1-10) NA/DK-99

Website Services

[Check: IF Q10b: website=yes, continue; otherwise go to Q24]

16. How often do you visit newfoundlandpower.com per month?
    1-2 times
    3-5 times
    5-10 times
    more than 10 times

17. What was the main reason for your visit(s) to newfoundlandpower.com during the last month? Were there any other reasons?

DO NOT READ LIST. RECORD Main and Other Reasons separately

	MAIN	OTHER
To get information on my bill	01	1
To change account information	02	1
To fill out forms	03	1
To get information on power outage	04	1
To review my usage history	05	1
To get phone number to call customer service	06	1
Other (specify) ______________________________		

18. Now, thinking about your visit(s) to newfoundlandpower.com during the past month, were you:

a) able to complete everything you wanted to do online, without having to call Newfoundland Power? YES/NO/NA_DK-99

a_1) **If Yes in 20a,** were you able to complete your request or find your information easily? YES/NO/NA_DK-99

a_2) **If No in 20a**, what else would you like to have done or what did you have to call about? (Specify)

b) If your inquiry required a response, did you receive one in a timely manner? YES/NO/NA_DK-99

19. Overall, on a scale from 1 to 10, where 1 is not at all satisfied and 10 is fully satisfied, how satisfied are you with newfoundlandpower.com ?

1 2 3 4 5 6 7 8 9 10

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION 22, ELSE SKIP TO Q23

20. Can you tell me the main reason why you gave a rating of _____? <**Recall from Q21**>

21. What, if anything, would you like to see or be able to do on newfoundlandpower.com?

Section 4: Demographic Information

24. **OBSERVE** Gender of respondent

    1. Male
    2. Female

25. Would you mind telling me into which of the following categories your age falls?

    1. 18 to 34
    2. 35 to 49
    3. 50 to 64
    4. 65 or older

    99 Refused (VOL)

26. What is your Postal Code

    1) _________
    2) Don't Know
    3) Prefer Not to say

That is the end of my questions.
THANK YOU VERY MUCH FOR YOUR HELP TODAY.

S2: According to information provided to us, you received a visit from a Newfoundland Power Field Representative on <RECALL DATE>. Is this correct?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	169	43	126
Yes	75%	75%	75%
Recall the actual visit but not the date	25%	25%	25%

Q1: How satisfied are you with the overall service provided by Newfoundland Power?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	169	43	126
1 - Not at all satisfied	1%	0%	1%
2	1%	0%	1%
3	1%	0%	1%
5	3%	2%	3%
6	1%	2%	1%
7	3%	11%	2%
8	13%	14%	12%
9	15%	16%	14%
10 - Fully satisfied	62%	56%	64%
Refused (VOL)	1%	0%	1%
Don't know (VOL)	1%	0%	1%
% 9 or higher	78%	72%	79%
Mean	9.1	9.1	9.2

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q2: Can you tell me the main reason why you gave a rating of ___? SUBSET: If rating is 6 or less.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	12	3	9
Customer Service Issues	100%	100%	100%
Price	2%	25%	0%

Q3: Did you meet with the Newfoundland Power field representative in person?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	169	43	126
Yes	65%	74%	64%
No	35%	26%	36%

Q4: How satisfied were you with the quality of service provided by the field representative who came to your <housebusiness> in terms of … SUBSET: Those who met a field representative in person.

		Total	Type	
			Commercial	Residential
Total Unweighted (n)		109	30	79
Being courteous and polite	6	1%	0%	1%
	8	5%	14%	4%
	9	5%	10%	4%
	10 - Fully satisfied	89%	76%	92%
Being respectful	7	1%	0%	1%
	8	5%	14%	3%
	9	7%	11%	6%
	10 - Fully satisfied	87%	75%	90%
Making you feel like a valued customer	8	10%	25%	7%
	9	6%	7%	6%
	10 - Fully satisfied	82%	68%	86%
	Don't know	1%	0%	1%
Being knowledgeable	8	6%	22%	2%
	9	7%	12%	6%
	10 - Fully satisfied	87%	65%	91%

Q4: How satisfied were you with the quality of service provided by the field representative who came to your <housebusiness> in terms of …
% 9 or higher
SUBSET: Those who met a field representative in person.

	Total	Type	
		Commercial	Residential
Being courteous and polite	94%	86%	95%
Being respectful	94%	86%	96%
Making you feel like a valued customer	90%	75%	93%
Being knowledgeable	94%	78%	98%

Refusals and Don't knows have been excluded.

Q4: How satisfied were you with the quality of service provided by the field representative who came to your <housebusiness> in terms of …
Mean Values
SUBSET: Those who met a field representative in person.

		Total	Type	
			Commercial	Residential
Being courteous and polite	N	109	30	79
	Mean	9.8	9.6	9.8
Being respectful	N	109	30	79
	Mean	9.8	9.6	9.8
Making you feel like a valued customer	N	108	30	78
	Mean	9.7	9.4	9.8
Being knowledgeable	N	109	30	79
	Mean	9.8	9.4	9.9

Q4: How satisfied were you with the quality of service provided by the field representative who came to your <housebusiness> in terms of …

		Total	Type	
			Commercial	Residential
Total Unweighted (n)		169	43	126
Keeping you up to date on the status of your work order	1 - Not at all satisfied	1%	0%	2%
	2	1%	0%	1%
	3	0%	2%	0%
	4	1%	1%	1%
	5	3%	4%	2%
	6	1%	2%	1%
	7	5%	8%	4%
	8	9%	22%	6%
	9	6%	10%	6%
	10 - Fully satisfied	58%	33%	62%
	Don't know	16%	18%	15%
Completing the work in a timely manner	5	1%	2%	1%
	6	1%	0%	2%
	7	1%	1%	1%
	8	10%	15%	9%
	9	12%	16%	11%
	10 - Fully satisfied	72%	63%	74%
	Refused	0%	1%	0%
	Don't know	4%	2%	4%
Leaving your premises in good condition	4	1%	0%	1%
	5	1%	0%	2%
	7	1%	0%	1%
	8	3%	8%	2%
	9	6%	14%	5%
	10 - Fully satisfied	84%	74%	86%
	Don't know	4%	5%	4%
Being able to deal with any issue you had	1 - Not at all satisfied	1%	0%	2%
	3	0%	2%	0%
	5	1%	2%	1%
	7	2%	2%	2%
	8	6%	16%	4%
	9	9%	11%	9%
	10 - Fully satisfied	73%	63%	75%
	Don't know	7%	5%	8%

Q4: How satisfied were you with the quality of service provided by the field representative who came to your <housebusiness> in terms of …
% 9 or higher

	Total	Type	
		Commercial	Residential
Keeping you up to date on the status of your work order	76%	52%	80%
Completing the work in a timely manner	87%	81%	88%
Leaving your premises in good condition	94%	91%	94%
Being able to deal with any issue you had	89%	77%	91%

Refusals and Don't knows have been excluded.

Q4: How satisfied were you with the quality of service provided by the field representative who came to your <housebusiness> in terms of …
Mean Values

		Total	Type	
			Commercial	Residential
Keeping you up to date on the status of your work order	N	140	34	106
	Mean	9.1	8.5	9.2
Completing the work in a timely manner	N	162	41	121
	Mean	9.6	9.4	9.6
Leaving your premises in good condition	N	163	42	121
	Mean	9.7	9.7	9.8
Being able to deal with any issue you had	N	157	42	115
	Mean	9.5	9.3	9.6

Q5: Overall how satisfied were you with the quality of service provided by the Newfoundland Power field representative(s) that came to your <house/business>?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	169	43	126
4	1%	0%	1%
6	1%	0%	1%
7	1%	1%	1%
8	7%	17%	5%
9	13%	20%	11%
10 - Fully satisfied	78%	63%	81%
% 9 or higher	90%	83%	92%
Mean	9.6	9.4	9.7

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q6: Can you tell me the main reason why you gave a rating of _____?
SUBSET: If rating is 6 or less.

	Total	Type
		Residential
Total Unweighted (n)	3	3
Not completed in reasonable time	100%	100%
Unresolved outside service issue	33%	33%

Q7: How satisfied would you be to have this/these field representative(s)/technician(s) visit your <home/business> again should you have another request that required a visit?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	169	43	126
5	1%	0%	1%
6	1%	0%	1%
7	1%	0%	1%
8	4%	8%	3%
9	10%	20%	8%
10 - Fully satisfied	84%	71%	86%
Don't know (VOL)	1%	1%	1%
% 9 or higher	95%	92%	95%
Mean	9.8	9.6	9.8

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q8: How satisfied were you with the time you had to wait between when you called for your request and when a field representative was able to meet with you to handle your request?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	169	43	126
2	1%	1%	1%
3	1%	0%	1%
5	3%	3%	2%
6	4%	6%	3%
7	7%	6%	7%
8	19%	30%	17%
9	10%	9%	10%
10 - Fully satisfied	53%	42%	55%
Don't know (VOL)	4%	3%	4%
% 9 or higher	65%	52%	68%
Mean	8.9	8.6	9.0

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q9: Did you use any of the following methods to contact or interact with Newfoundland Power within the past month?

		Total	Type	
			Commercial	Residential
Total Unweighted (n)		169	43	126
E-mail	Yes	13%	18%	12%
	No	87%	82%	88%
Visit(s) to the newfoundlandpower.com website	Yes	12%	19%	11%
	No	87%	81%	88%
	Don't know	1%	0%	1%
Social Media	Yes	4%	5%	3%
	No	96%	95%	96%
	Don't know	1%	0%	1%
In-person	Yes	12%	23%	10%
	No	87%	77%	89%
	Don't know	1%	0%	1%
Telephone	Yes	47%	66%	43%
	No	53%	34%	57%

Q10: How satisfied were you with following method(s) of contact? SUBSET: Those who use these methods.

		Total	Type	
			Commercial	Residential
Total (n)		27	11	16
E-mail	1 - Not at all satisfied	4%	0%	6%
	3	2%	10%	0%
	7	4%	0%	6%
	8	15%	25%	13%
	9	7%	31%	0%
	10 - Fully satisfied	67%	35%	76%
Total (n)		5	1	4
Social Media	8	21%	100%	0%
	9	36%	0%	45%
	10 - Fully satisfied	43%	0%	55%
Total (n)		25	12	13
In-person	2	5%	0%	7%
	6	1%	4%	0%
	8	3%	11%	0%
	9	7%	24%	0%
	10 - Fully satisfied	84%	61%	93%

Q10: How satisfied were you with following method(s) of contact?
SUBSET: Those who use these methods.
% 9 or higher

	Total	Type	
		Commercial	Residential
E-mail	74%	65%	76%
Social Media	79%	0%	100%
In-person	91%	85%	93%

Refusals and Don't knows have been excluded.

Q10: How satisfied were you with following method(s) of contact?
SUBSET: Those who use these methods.
Mean Values

		Total	Type	
			Commercial	Residential
E-mail	N	27	11	16
	Mean	8.9	8.5	9.1
Social Media	N	5	1	4
	Mean	9.2	8.0	9.5
In-person	N	25	12	13
	Mean	9.4	9.4	9.5

**Q11: How would you rate your satisfaction towards the employee(s) who handled your call in terms of:
SUBSET: Those who contacted by phone.**

		Total	Type	
			Commercial	Residential
Total Unweighted (n)		100	33	67
Being courteous and polite	6	0%	1%	0%
	7	3%	6%	2%
	8	1%	5%	0%
	9	7%	16%	5%
	10 - Fully satisfied	86%	65%	91%
	Don't know	2%	6%	1%
Being respectful	6	1%	8%	0%
	7	0%	1%	0%
	8	4%	4%	4%
	9	8%	11%	7%
	10 - Fully satisfied	85%	70%	88%
	Don't know	1%	6%	0%
Making you feel like a valued customer	5	0%	1%	0%
	6	1%	8%	0%
	7	1%	1%	1%
	8	9%	19%	6%
	9	5%	10%	4%
	10 - Fully satisfied	82%	55%	88%
	Don't know	1%	6%	0%
taking the necessary time to understand your needs	1 - Not at all satisfied	1%	0%	1%
	7	5%	16%	2%
	8	7%	16%	4%
	9	7%	5%	8%
	10 - Fully satisfied	79%	56%	84%
	Don't know	1%	6%	0%
providing thorough and accurate information in response to your questions	6	1%	8%	0%
	7	5%	10%	4%
	8	6%	15%	4%
	9	8%	4%	9%
	10 - Fully satisfied	78%	56%	83%
	Don't know	1%	8%	0%

**Q11: How would you rate your satisfaction towards the employee(s) who handled your call in terms of:
% 9 or higher
SUBSET: Those who contacted by phone.**

	Total	Type	
		Commercial	Residential
Being courteous and polite	96%	87%	98%
Being respectful	94%	87%	96%
Making you feel like a valued customer	89%	69%	93%
taking the necessary time to understand your needs	87%	65%	92%
providing thorough and accurate information in response to your questions	87%	65%	92%

Refusals and Don't knows have been excluded.

**Q11: How would you rate your satisfaction towards the employee(s) who handled your call in terms of:
Mean Values
SUBSET: Those who contacted by phone.**

		Total	Type	
			Commercial	Residential
Being courteous and polite	N	98	32	66
	Mean	9.8	9.5	9.9
Being respectful	N	99	32	67
	Mean	9.8	9.4	9.8
Making you feel like a valued customer	N	99	32	67
	Mean	9.7	9.1	9.8
taking the necessary time to understand your needs	N	99	32	67
	Mean	9.5	9.1	9.6
providing thorough and accurate information in response to your questions	N	98	31	67
	Mean	9.6	9.0	9.7

Q12: Overall how satisfied were you with the quality of service provided by the Newfoundland Power representative(s) you dealt with on this call?
SUBSET: Those who contacted by phone.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	100	33	67
1 - Not at all satisfied	1%	0%	1%
6	0%	1%	0%
7	2%	8%	1%
8	8%	24%	4%
9	9%	9%	9%
10 - Fully satisfied	78%	52%	84%
Don't know (VOL)	1%	6%	0%
% 9 or higher	88%	65%	93%
Mean	9.6	9.1	9.7

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q13: Can you tell me the main reason why you gave a rating of ___.
SUBSET: If rating is 6 or less.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	2	1	1
Poor customer service	84%	0%	100%
No resolution / Issue not resolved	84%	0%	100%
Refused (VOL)	16%	100%	0%

Q14: During the last month, did you make a call to the Power Outages & Emergencies number of Newfoundland Power?
SUBSET: Those who contacted by phone.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	100	33	67
Yes	6%	1%	7%
No	93%	95%	93%
Don't know (VOL)	1%	4%	0%

Q15: Now, thinking about the time(s) that you called this telephone line, how would you rate your satisfaction in terms of:
SUBSET: Those who contacted by phone.

	Total	Type

		Total	Commercial	Residential
Total Unweighted (n)		5	1	4
Your ability to get the information you were seeking	5	16%	0%	16%
	8	27%	0%	28%
	10 - Fully satisfied	58%	100%	56%
Timeliness of updates	5	16%	0%	16%
	8	27%	0%	28%
	9	27%	0%	28%
	10 - Fully satisfied	31%	100%	28%
Ability to easily identify which menu number to press for your inquiry	6	54%	0%	56%
	9	16%	0%	16%
	10 - Fully satisfied	31%	100%	28%

Q15: Now, thinking about the time(s) that you called this telephone line, how would you rate your satisfaction in terms of:
% 9 or higher
SUBSET: Those who contacted by phone.

	Total	Type	
		Commercial	Residential
Your ability to get the information you were seeking	58%	100%	56%
Timeliness of updates	58%	100%	56%
Ability to easily identify which menu number to press for your inquiry	46%	100%	44%

Refusals and Don't knows have been excluded.

Q15: Now, thinking about the time(s) that you called this telephone line, how would you rate your satisfaction in terms of:
Mean Values
SUBSET: Those who contacted by phone.

		Total	Type	
			Commercial	Residential
Your ability to get the information you were seeking	N	5	1	4
	Mean	8.7	10.0	8.6
Timeliness of updates	N	5	1	4
	Mean	8.4	10.0	8.3
Ability to easily identify which menu number to press for your inquiry	N	5	1	4
	Mean	7.7	10.0	7.6

Q16: How often do you visit newfoundlandpower.com per month?
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	19	5	14
Less than once per month	41%	24%	47%
1-2 times	59%	76%	53%

Q17a: What was the main reason for your visit(s) to newfoundlandpower.com during the last month? Were there any other reasons?
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	19	5	14
To get information on my bill	38%	0%	50%
To change account information	6%	0%	8%
To get information on power outage	19%	52%	8%
To get phone number to call customer service	21%	48%	12%
Other (Please Specify)	17%	0%	23%

Q17b: Were any other reasons?
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	19	5	14
No other reason (VOL)	75%	100%	67%
Other (Please Specify)	10%	0%	14%
To get phone number to call customer service	6%	0%	8%
To get information on my bill	5%	0%	6%
To change account information	5%	0%	6%

Q17a/Q17b combined:
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	19	5	14
To get information on my bill	42%	0%	56%
Other (Please Specify)	27%	0%	36%
To get phone number to call customer service	27%	48%	20%
To get information on power outage	19%	52%	8%
To change account information	10%	0%	14%

Q18a: Thinking about your visit(s) to newfoundlandpower.com during the past month, were you able to complete everything you wanted to do online, without having to call NL Power
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	19	5	14
Yes	79%	76%	80%
No	21%	24%	20%

Q18a1: Were you able to complete your request or find your information easily?
SUBSET: Those who completed everything online.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	15	4	11
Yes	100%	100%	100%

Q18a2: What else would you like to have done or what did you have to call about?
SUBSET: Those who were not able to complete everything online.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	4	1	3
Other (Please Specify)	100%	100%	100%

Q18b: If your inquiry required a response, did you receive one in a timely manner?
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	19	5	14
Yes	68%	76%	65%
No	10%	0%	14%
Refused (VOL)	5%	0%	6%
Don't know (VOL)	17%	24%	15%

Q19: Overall, on a scale from 1 to 10, where 1 is not at all satisfied and 10 is fully satisfied, how satisfied are you with newfoundlandpower.com?
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	19	5	14
7	12%	24%	8%
8	10%	24%	6%
9	29%	24%	30%
10 - Fully satisfied	49%	28%	56%
% 9 or higher	78%	52%	86%
Mean	9.2	8.6	9.3

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q21: What, if anything, would you like to see or be able to do on newfoundlandpower.com?
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	19	5	14
Don't know (VOL)	60%	48%	64%
Other (Please Specify)	40%	52%	36%

D2: Would you mind telling me into which of the following categories your age falls?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	169	43	126
18 to 34	10%	18%	9%
35 to 49	35%	38%	34%
50 to 64	36%	41%	36%
65 or older	18%	3%	21%

Newfoundland Power
Customer Satisfaction Survey
- Transactional Surveys –
Online (MyAccount and Webforms) Transactions
Last Updated September 18, 2013

Email Script

Dear Customer,

As part of our ongoing commitment to customer service, Newfoundland Power has asked MQO Research to survey our customers who have completed an online transaction through the Newfoundland Power website over the past 3 months. Through this survey we will identify areas where Newfoundland Power has been serving you well, as well as areas where improvements are needed in order to provide you with service excellence. You have been randomly selected to participate. While the results of this survey will remain anonymous, they will be very important to ensuring continued improvements to Newfoundland Power's customer service. We thank you in advance for taking the time to share your opinions with us.

Yours truly,

Sherina Wall

Director, Customer Relations

Newfoundland Power

Introduction
You are being contacted today as part of Newfoundland Power's customer experience program. You or someone from this email address made

ONLINE:MYACCOUNT LOGIN
…. a recent visit to Newfoundland Power's website newfoundlandpower.com in the past month or so.

Put at Bottom of Email Script
If you would like to confirm the validity of the survey with Newfoundland Power, you can call **709-737-2802 locally or 1-800-663-2802 toll-free** and speak to an employee of Newfoundland Power. **[NOTE: The Newfoundland Power Contact Centre is open during regular business hours Monday to Friday 8:00am to 5:00pm]**

RESIDENTIAL INTRO: This survey is intended for the person in the household who visited Newfoundland Power's website, newfoundlandpower.com in the past month or so. If this is someone other than you, please have the other person complete the survey. Depending on your responses the survey will take about 5-7 minutes to complete.

BUSINESS INTRO: This survey is intended for the person in this business or organization who visited Newfoundland Power's website, newfoundlandpower.com in the past month or so. If this is someone other than you, please have the other person complete the survey. If more than one individual visited the website with the past month or so, please have at least one of these individuals complete the survey. Depending on your responses the survey will take about 5-7 minutes to complete.

VALIDITY RESPONSE:
For additional information on MQO Research, please press here…otherwise continue with the survey:

MQO Research has been conducting research studies in Canada and abroad for 30 years. We are a Member of the Canadian Marketing Research AND Intelligence Association (MRIA) which is responsible for regulating marketing research practices in Canada. MQO Research adheres very strictly to all guidelines of professionalism and privacy as outlined by the MRIA. This study is registered with the Association. If you would like to contact the MRIA to verify the legitimacy of this research study or our company please call 1-800-554-9996 toll free and reference survey Number: 0584.

CONFIDENTIALITY RESPONSE:
For information on the confidentiality of the information being provided, please press here…otherwise continue with the survey.

As a Corporate Gold Seal member of the Marketing Research Intelligence Association (MRIA) we adhere to strict standards of privacy and confidentiality. Our data is always grouped. Information will never be released to our client or any other third party in a manner that could be used to disclose your identity.

Screening and Confirmation Questions:

S1. Do you, or anyone in your household currently work for NF Power?

Yes	1	**Thank and Terminate**
No	2	**Continue**

Online Visit (My Account/Web forms)

S2. According to information provided, you made at least one visit to the website, newfoundlandpower.com on <RECALL DATE> . Is this correct?

Yes	1	**Continue**
No	2	**Thank**
Yes, but can't remember the exact date	3	**Continue**

Section 1: General Service

1. First, we would like to get your opinion of the overall service provided by Newfoundland Power. On a 10 point scale where 1 is "Not at all satisfied" and 10 is "Fully satisfied", how satisfied are you with the overall service provided by Newfoundland Power?

   1 2 3 4 5 6 7 8 9 10

   IF RESPONSE IS 6 OR LESS GO TO QUESTION 2, ELSE GO TO QUESTION 3.

2. What is the main reason why you gave a rating of _____**<Recall from Q1>?**

Section 2: Website Services

3. How often do you visit newfoundlandpower.com per month?

   Less than once per month
   1-2 times
   3-5 times
   6-10 times
   more than 10 times
   Don't Know

4. What was the main reason for your visit(s) to newfoundlandpower.com during the last month? Were there any other reasons?

DO NOT READ LIST. RECORD Main and Other Reasons separately

	MAIN	OTHER
To get information on my bill	01	1
To change account information	02	1
To fill out forms	03	1
To get information on power outage	04	1
To review my usage history	05	1
To get phone number to call customer service	06	1
Other (specify) ____________________________		

5. Now, thinking about your visit(s) to newfoundlandpower.com during the past month, were you:

   a) able to complete everything you wanted to do online, without having to call Newfoundland Power? YES/NO/NA_DK-99

   a_1) **If Yes in 17a,** were you able to complete your request or find your information easily? YES/NO/NA_DK-99

   a_2) **If No in 17a**, what else would you like to have done or what did you have to call about? (Specify)

   b) If your inquiry required a response, did you receive one in a timely manner? YES/NO/NA_DK-99

6. Overall, on a scale from 1 to 10, where 1 is not at all satisfied and 10 is fully satisfied, how satisfied are you with newfoundlandpower.com ?

1 2 3 4 5 6 7 8 9 10

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION 7, ELSE SKIP TO Q8

7. What is the main reason why you gave a rating of _____? <**Recall from Q7**>

8. What, if anything, would you like to see or be able to do on newfoundlandpower.com?

Section 4: Other Forms of Customer Service

Other Methods of Contact

9. Did you use any of the following methods to contact or interact with Newfoundland Power within the past month?

Read List	**Yes**	**No**	**DK**
a) E-mail	1	2	9
b) Visit(s) to the newfoundlandpower.com website	1	2	9
c) Social Media such as Twitter	1	2	9
d) In-person	1	2	9
e) Telephone	1	2	9

10. **For each YES mention in Q9a, c or d above:** How satisfied were you with the following method(s) of contact?

Not at All Satisfied									**Fully Satisfied**	
1	2	3	4	5	6	7	8	9	10	Don't Know

Telephone Contact

[Check: IF Q9e: telephone=yes, continue; otherwise go to Q14]:

You mentioned you contacted Newfoundland Power by telephone within the past month.

11. Now, thinking about the Newfoundland Power representative(s) you spoke with on the phone, how would you rate your satisfaction towards the employee(s) who handled your call in terms of:

Note: If you spoke to more than 1 employee, using multiple methods of contact, for this series of questions, consider only the part handled <u>over the telephone</u> to make your request. If you spoke with more than 1 employee, consider all of the representatives you dealt with by telephone to make your request.

How satisfied are you with the representative you dealt with in terms of…..

Random order

a) Being courteous and polite (1-10) NA/DK-99
b) Being respectful (1-10) NA/DK-99
c) Making you feel like a valued customer (1-10) NA/DK-99
d) taking the necessary time to understand your needs (1-10) NA/DK – 99
e) providing thorough and accurate information in response to your questions (1-10) NA/DK – 99

12. Now, considering all the aspects just mentioned as well as anything else you might think of, **overall** how satisfied were you with the quality of service provided by the Newfoundland Power representative(s) you dealt with on this call?

 Note: If you spoke with more than one employee, consider all of the representatives you dealt with, how satisfied were you with them overall?

_______.................................... (1-10)
NA / DK.................................. 99 *Go to Q14*

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION 13, ELSE SKIP TO Q14

13. Can you tell me the main reason why you gave a rating of _____<**Recall from Q12**>

Automated system

14. During the last month, did you make a call to the Power Outages & Emergencies number of Newfoundland Power?

[Interviewer, if required: the number is 737-5711 or toll free 1-800-474-5711]

1. Yes (Continue to Question 15)
2. No (Go to Demographics Q16)

15. Now, thinking about the time(s) that you called this telephone line in the last month, how would you rate your satisfaction in terms of:

a) Your ability to get the information you were seeking (1-10) NA/DK-99
b) Timeliness of updates (1-10) NA/DK-99

Section 5: Demographics

Now, just a few final questions about yourself to help us group responses.

16. Are you…

1. Male
2. Female

17. Into which of the following categories does your age fall?

1. 18 to 34
2. 35 to 49
3. 50 to 64
4. 65 or older

99 Refused (VOL)

18. What is your Postal Code?

1) _________
2) Don't Know
3) Prefer Not to say

That is the end of the questions.
THANK YOU VERY MUCH FOR YOUR HELP TODAY.

S1: Do you, or anyone in your household currently work for NF Power?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	782	25	757
No	100%	100%	100%

S2: According to information provided, you made at least one visit to the website, newfoundlandpower.com on <RECALL DATE> . Is this correct?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	782	25	757
Yes	52%	53%	52%
Yes, but can't remember the exact date	48%	47%	48%

Q1: How satisfied are you with the overall service provided by Newfoundland Power?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	782	25	757
1 - Not at all satisfied	0%	0%	0%
2	0%	0%	0%
3	0%	8%	0%
4	1%	0%	1%
5	4%	9%	3%
6	3%	0%	3%
7	11%	14%	11%
8	18%	17%	18%
9	16%	5%	16%
10 - Fully satisfied	46%	47%	46%
Prefer not to say	1%	0%	1%
Don't know	1%	0%	1%
% 9 or higher	62%	51%	62%
Mean	8.7	8.1	8.7

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q2: Can you tell me the main reason why you gave a rating of ___?
SUBSET: If rating is 6 or less.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	64	4	60
Prefer not to say	26%	64%	25%
Billing / Meter Reading / Accuracy	25%	36%	25%
Price	24%	0%	25%
Customer Service Issues	20%	0%	20%
Miscellaneous Mention	11%	0%	12%
Reliability / Power Outages	5%	0%	5%
Don't know	3%	0%	3%

Q3: How often do you visit newfoundlandpower.com per month?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	782	25	757
Less than once per month	26%	25%	26%
1-2 times	64%	67%	64%
3-5 times	7%	8%	7%
6-10 times	0%	0%	0%
More than 10 times	0%	0%	0%
Prefer not to say	0%	0%	0%
Don't know	2%	0%	2%

Q4a: What was the main reason for your visit(s) to newfoundlandpower.com during the last month?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	782	25	757
To get information on my bill	77%	75%	77%
To change account information	5%	12%	5%
To fill out forms	0%	0%	0%
To get information on power outage	1%	0%	1%
To review my usage history	10%	5%	10%
To get phone number to call customer service	1%	0%	1%
Other (Please Specify)	3%	8%	3%
Prefer not to say	0%	0%	0%
Don't know	2%	0%	2%

Q4b: Were there any other reasons?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	764	25	739
To review my usage history	41%	46%	41%
Don't know	20%	24%	19%
Other (Please Specify)	15%	11%	15%
To get information on my bill	13%	5%	13%
To change account information	7%	0%	7%
To get information on power outage	6%	8%	6%
To get phone number to call customer service	4%	3%	4%
To fill out forms	2%	0%	2%
Prefer not to say	2%	5%	2%

Q4a/Q4b combined:

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	782	25	757
To get information on my bill	90%	80%	90%
To review my usage history	50%	50%	50%
Other (Please Specify)	17%	19%	17%
To change account information	12%	12%	12%
To get information on power outage	7%	8%	7%
To get phone number to call customer service	5%	3%	5%
To fill out forms	2%	0%	2%
Don't know	2%	0%	2%
Prefer not to say	0%	0%	0%

Q5a: Thinking about your visit(s) to newfoundlandpower.com during the past month, were you able to complete everything you wanted to do online, without having to call NL Power?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	782	25	757
Yes	91%	81%	91%
No	8%	19%	8%
Prefer not to say	0%	0%	0%
Don't know	1%	0%	1%

Q5a1: Were you able to complete your request or find your information easily?
SUBSET: Those who completed everything online.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	711	21	690
Yes	97%	89%	97%
No	2%	11%	2%
Prefer not to say	0%	0%	0%
Don't know	1%	0%	1%

Q5a2: What else would you like to have done or what did you have to call about?
SUBSET: Those who didn't complete everything online.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	71	4	67
Please Enter Response in Box Below:	75%	100%	75%
Don't know	16%	0%	16%
Prefer not to say	9%	0%	9%

Q5b: If your inquiry required a response, did you receive one in a timely manner?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	782	25	757
Yes	22%	31%	21%
No	2%	0%	2%
Response was not required	75%	65%	75%
Don't know	2%	5%	2%

Q6: Overall, on a scale from 1 to 10, where 1 is not at all satisfied and 10 is fully satisfied, how satisfied are you with newfoundlandpower.com?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	782	25	757
1 - Not at all satisfied	0%	0%	0%
2	0%	0%	0%
3	0%	8%	0%
4	0%	0%	0%
5	3%	3%	3%
6	3%	8%	3%
7	10%	6%	10%
8	17%	28%	17%
9	18%	11%	18%
10 - Fully satisfied	47%	36%	47%
Prefer not to say	1%	0%	1%
Don't know	1%	0%	1%
% 9 or higher	66%	47%	66%
Mean	8.8	8.1	8.8

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q7: What is the main reason why you gave a rating of ___? SUBSET: If rating is 6 or less

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	54	3	51
Miscellaneous Mention	30%	58%	29%
Not user-friendly / hard to navigate through	26%	42%	26%
The inability to pay bills online / automatic payments	19%	0%	20%
Prefer not to say	17%	0%	18%
Don't know	9%	0%	10%
The inability to make certain account changes	2%	0%	2%
No use	2%	0%	2%

Q8: What, if anything, would you like to see or be able to do on newfoundlandpower.com?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	782	25	757
Don't know	60%	74%	59%
Please Enter Response in Box Below:	33%	26%	33%
Prefer not to say	7%	0%	7%

Q9: Did you use any of the following methods to contact or interact with Newfoundland Power within the past month?

		Total	Type	
			Commercial	Residential
Total Unweighted (n)		782	25	757
E-mail	Yes	19%	27%	19%
	No	79%	73%	79%
	Prefer not to say	0%	0%	0%
	Don't know	1%	0%	1%
Social Media	Yes	4%	0%	4%
	No	94%	100%	94%
	Prefer not to say	1%	0%	1%
	Don't know	1%	0%	1%
In-person	Yes	3%	5%	3%
	No	95%	95%	95%
	Prefer not to say	1%	0%	1%
	Don't know	1%	0%	1%
Telephone	Yes	19%	20%	19%
	No	79%	80%	79%
	Prefer not to say	1%	0%	1%
	Don't know	1%	0%	1%

**Q10: How satisfied were you with the following method(s) of contact?
SUBSET: Those who used these methods to contact NL Power.**

		Total	Type	
			Commercial	Residential
Total (n)		150	6	144
E-mail	1 - Not at all satisfied	1%	0%	1%
	3	1%	0%	1%
	4	1%	0%	1%
	5	1%	42%	0%
	6	4%	0%	4%
	7	4%	0%	4%
	8	13%	17%	13%
	9	12%	0%	12%
	10 - Fully satisfied	63%	41%	63%
	Don't know	1%	0%	1%
Total (n)		34	0	34
Social Media	6	9%	0%	9%
	7	9%	0%	9%
	8	24%	0%	24%
	9	15%	0%	15%
	10 - Fully satisfied	44%	0%	44%
Total (n)		26	1	25
In-person	4	4%	0%	4%
	6	4%	0%	4%
	7	12%	0%	12%
	8	12%	0%	12%
	9	8%	0%	8%
	10 - Fully satisfied	53%	100%	52%
	Don't know	8%	0%	8%

**Q10: How satisfied were you with the following method(s) of contact?
SUBSET: Those who used these methods to contact NL Power.
% 9 or higher**

	Total	Type	
		Commercial	Residential
E-mail	75%	41%	75%
Social Media	59%	0%	59%
In-person	66%	100%	65%

Refusals and Don't knows have been excluded.

Q10: How satisfied were you with the following method(s) of contact?
SUBSET: Those who used these methods to contact NL Power.
Mean Values

		Total	Type	
			Commercial	Residential
E-mail	N	149	6	143
	Mean	9.1	7.6	9.1
Social Media	N	34	0	34
	Mean	8.8		8.8
In-person	N	24	1	23
	Mean	8.8	10.0	8.8

Q11: How satisfied are you with the representative you dealt with in terms of…..
SUBSET: Those who contacted by phone.

		Total	Type	
			Commercial	Residential
Total Unweighted (n)		149	4	145
Being courteous and polite	2	1%	0%	1%
	3	0%	40%	0%
	5	1%	0%	1%
	6	1%	0%	1%
	7	5%	0%	5%
	8	18%	0%	18%
	9	14%	0%	14%
	10 - Fully satisfied	58%	60%	58%
	Prefer not to say	1%	0%	1%
	Don't know	1%	0%	1%
Being respectful	1 - Not at all satisfied	0%	40%	0%
	3	1%	0%	1%
	5	1%	0%	1%
	6	2%	0%	2%
	7	7%	0%	7%
	8	14%	0%	14%
	9	16%	0%	16%
	10 - Fully satisfied	56%	60%	56%
	Prefer not to say	1%	0%	1%
	Don't know	1%	0%	1%

Making you feel like a valued customer	1 - Not at all satisfied	1%	40%	1%
	2	1%	0%	1%
	4	1%	0%	1%
	5	2%	0%	2%
	6	3%	0%	4%
	7	2%	0%	2%
	8	19%	0%	19%
	9	15%	0%	15%
	10 - Fully satisfied	52%	60%	52%
	Prefer not to say	1%	0%	1%
	Don't know	2%	0%	2%
taking the necessary time to understand your needs	1 - Not at all satisfied	1%	0%	1%
	2	1%	0%	1%
	3	0%	40%	0%
	5	1%	0%	1%
	6	1%	0%	1%
	7	5%	0%	5%
	8	18%	0%	18%
	9	14%	0%	14%
	10 - Fully satisfied	55%	60%	55%
	Prefer not to say	1%	0%	1%
	Don't know	2%	0%	2%
providing thorough and accurate information in response to your questions	1 - Not at all satisfied	2%	0%	2%
	2	1%	0%	1%
	3	2%	40%	1%
	5	1%	0%	1%
	6	1%	0%	1%
	7	5%	0%	6%
	8	15%	0%	15%
	9	16%	0%	16%
	10 - Fully satisfied	54%	60%	54%
	Prefer not to say	1%	0%	1%
	Don't know	1%	0%	1%

Q11: How satisfied are you with the representative you dealt with in terms of…..
SUBSET: Those who contacted by phone.
% 9 or higher

	Total	Type	
		Commercial	Residential
Being courteous and polite	73%	60%	73%
Being respectful	74%	60%	74%
Making you feel like a valued customer	69%	60%	69%
taking the necessary time to understand your needs	71%	60%	72%
providing thorough and accurate information in response to your questions	72%	60%	72%

Refusals and Don't knows have been excluded.

Q11: How satisfied are you with the representative you dealt with in terms of…..
SUBSET: Those who contacted by phone.
Mean Values

		Total	Type	
			Commercial	Residential
Being courteous and polite	N	146	4	142
	Mean	9.1	7.2	9.2
Being respectful	N	146	4	142
	Mean	9.1	6.4	9.1
Making you feel like a valued customer	N	145	4	141
	Mean	8.9	6.4	8.9
taking the necessary time to understand your needs	N	145	4	141
	Mean	9.0	7.2	9.0
providing thorough and accurate information in response to your questions	N	146	4	142
	Mean	8.8	7.2	8.9

Q12: Overall how satisfied were you with the quality of service provided by the Newfoundland Power representative(s) you dealt with on this call?
SUBSET: Those who contacted by phone.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	149	4	145
1 - Not at all satisfied	2%	0%	2%
2	1%	0%	1%
3	1%	40%	1%
5	1%	0%	1%
6	2%	0%	2%
7	10%	0%	10%
8	11%	0%	11%
9	16%	0%	16%
10 - Fully satisfied	56%	60%	56%
Don't know (VOL)	1%	0%	1%
% 9 or higher	72%	60%	72%
Mean	8.9	7.2	8.9

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q13: Can you tell me the main reason why you gave a rating of ___.
SUBSET: Those who contacted by phone.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	10	1	9
Representative wasn't knowledgeable	41%	0%	45%
Poor customer service (Attitude, manners, etc)	30%	0%	33%
Prefer not to say	21%	0%	22%
Miscellaneous Mention	11%	0%	11%
Don't know	7%	100%	0%

Q14: During the last month, did you make a call to the Power Outages & Emergencies number of Newfoundland Power?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	782	25	757
Yes	6%	8%	6%
No	93%	92%	93%
Don't know	2%	0%	2%

Q15: Now, thinking about the time(s) that you called this telephone line in the last month, how would you rate your satisfaction in terms of:
SUBSET: Those who called to the Power Outages & Emergencies number of NL Power.

		Total	Type	
			Commercial	Residential
Total Unweighted (n)		45	2	43
Your ability to get the information you were seeking	1 - Not at all satisfied	5%	0%	5%
	3	5%	0%	5%
	6	2%	0%	2%
	7	3%	59%	2%
	8	18%	0%	19%
	9	19%	0%	19%
	10 - Fully satisfied	46%	41%	46%
	Don't know	2%	0%	2%
Timeliness of updates	1 - Not at all satisfied	5%	0%	5%
	4	2%	0%	2%
	5	2%	0%	2%
	7	5%	0%	5%
	8	21%	0%	21%
	9	19%	59%	19%
	10 - Fully satisfied	44%	41%	44%
	Don't know	2%	0%	2%

Q15: Now, thinking about the time(s) that you called this telephone line in the last month, how would you rate your satisfaction in terms of:
SUBSET: Those who called to the Power Outages & Emergencies number of NL Power.
% 9 or higher

	Total	Type	
		Commercial	Residential
Your ability to get the information you were seeking	66%	41%	66%
Timeliness of updates	65%	100%	64%

Refusals and Don't knows have been excluded.

Q15: Now, thinking about the time(s) that you called this telephone line in the last month, how would you rate your satisfaction in terms of:
SUBSET: Those who called to the Power Outages & Emergencies number of NL Power.
Mean Values

		Total	Type	
			Commercial	Residential
Your ability to get the information you were seeking	N	44	2	42
	Mean	8.5	8.2	8.5
Timeliness of updates	N	44	2	42
	Mean	8.6	9.4	8.5

D1: Gender:

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	782	25	757
Male	40%	22%	40%
Female	60%	78%	60%

D2: Would you mind telling me into which of the following categories your age falls?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	782	25	757
18 to 34	24%	31%	24%
35 to 49	33%	36%	33%
50 to 64	30%	23%	31%
65 or older	11%	9%	11%
Prefer not to say	1%	0%	1%

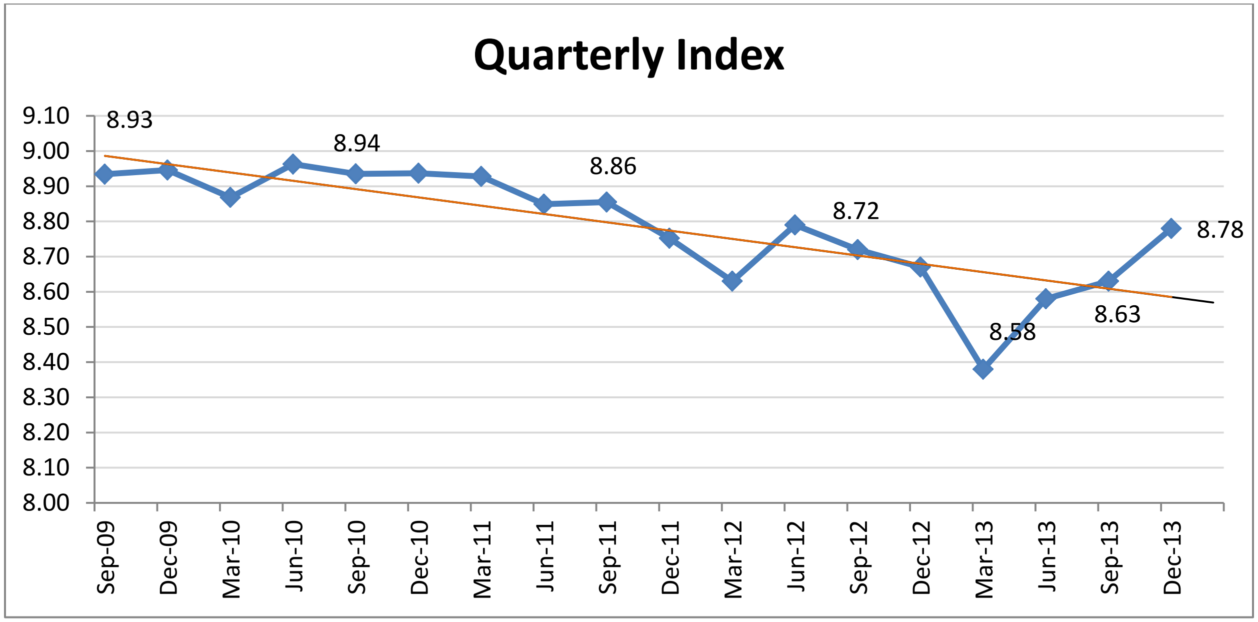
Q4 2013 Customer Satisfaction Survey
(Traditional)

NEWFOUNDLAND POWER
A FORTIS COMPANY

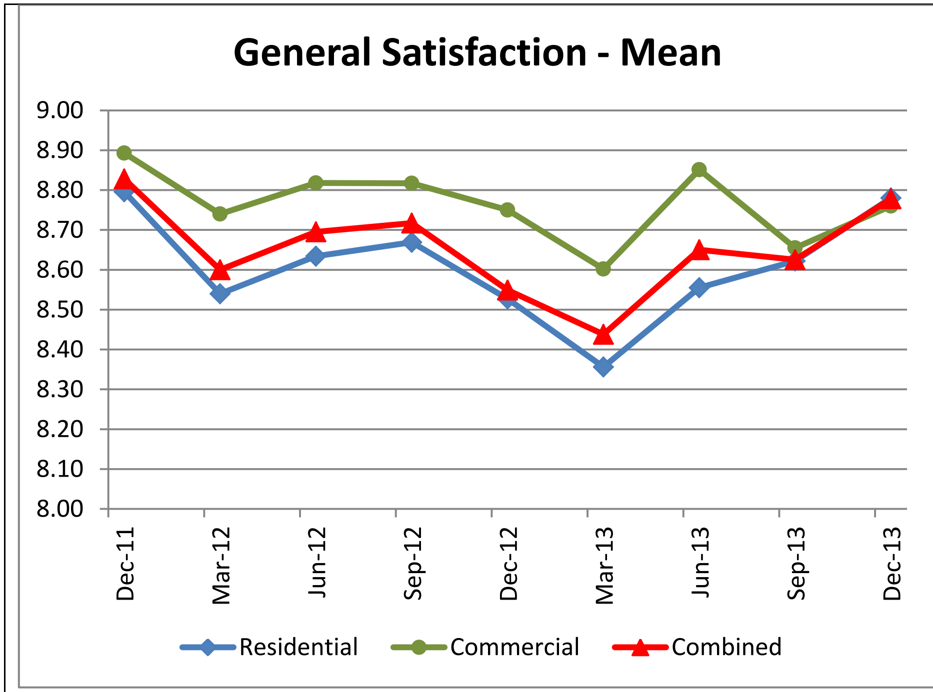
Q4 Customer Satisfaction Report

December 31, 2013

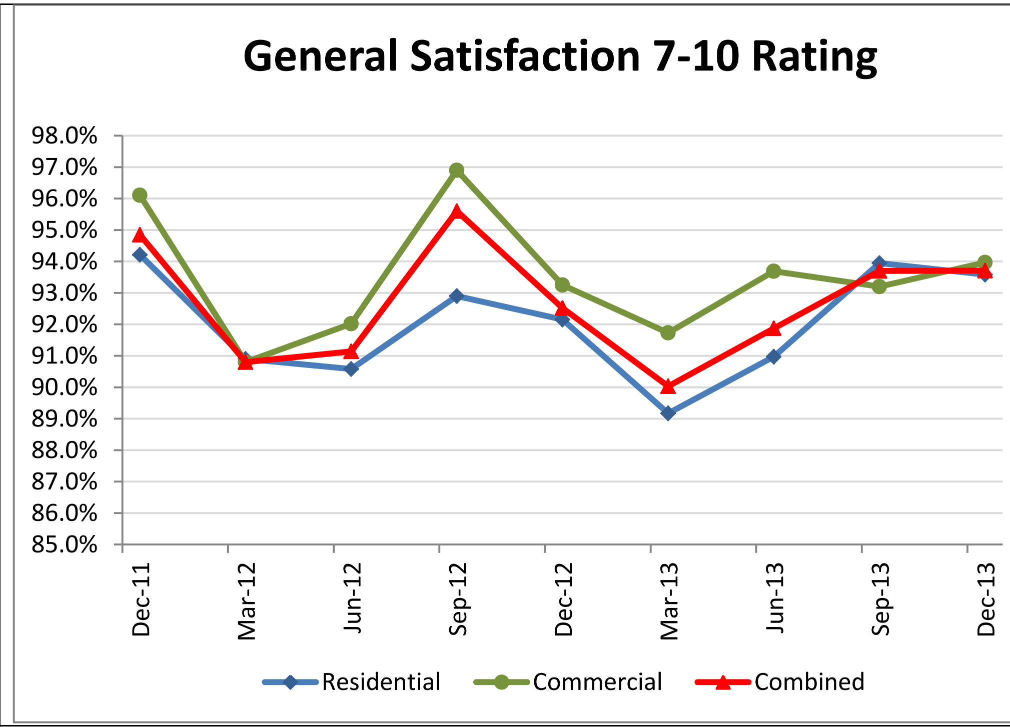
Customer Satisfaction Report
December 2013



The historical quarterly trend is shown in the above graph. The customer satisfaction index for the 4th quarter 2013 is 87.8%, higher than last quarter's 86.3%. This compares with 86.7% in December 2012 and 87.5% in December 2011



Mean averages the ratings provided by all customer's surveyed.

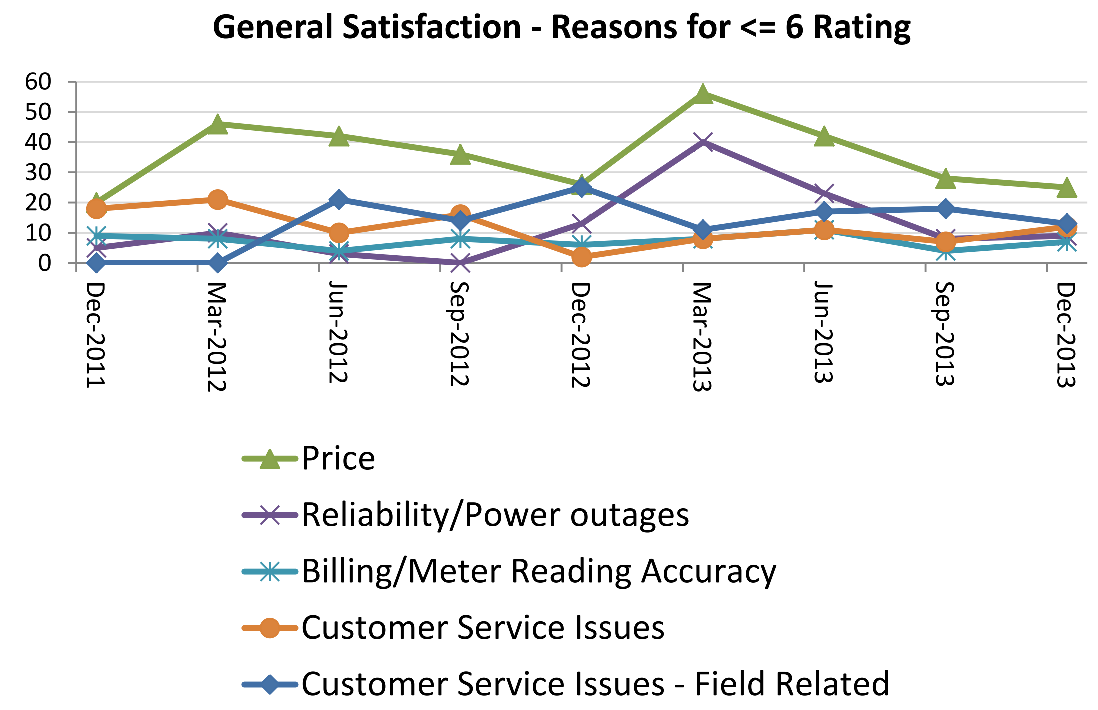


Percentage of customer's surveyed that gave a 7-10 rating.

General Satisfaction score tends to reflect an overall perception of the Company. Customer's direct interactions with us also influence this score. There is a trend indicating people who have called us tend to rate us lower in General Satisfaction than people who have not. For this survey the mean score of those who called was 8.44 and 8.89 for those who did not call.

General Satisfaction – 1193 Customers surveyed.

(Mean)	This Quarter	Last Quarter	Same Quarter Last Year
Residential	8.78	8.62	8.53
Commercial	8.76	8.66	8.75
Total	8.78	8.63	8.55
7-10 Rating	% of customer's surveyed that gave a 7-10 rating.		
Residential	93.6%	94.0%	92.2%
Commercial	94.0%	93.2%	93.3%
Total	93.7%	93.7%	92.5%

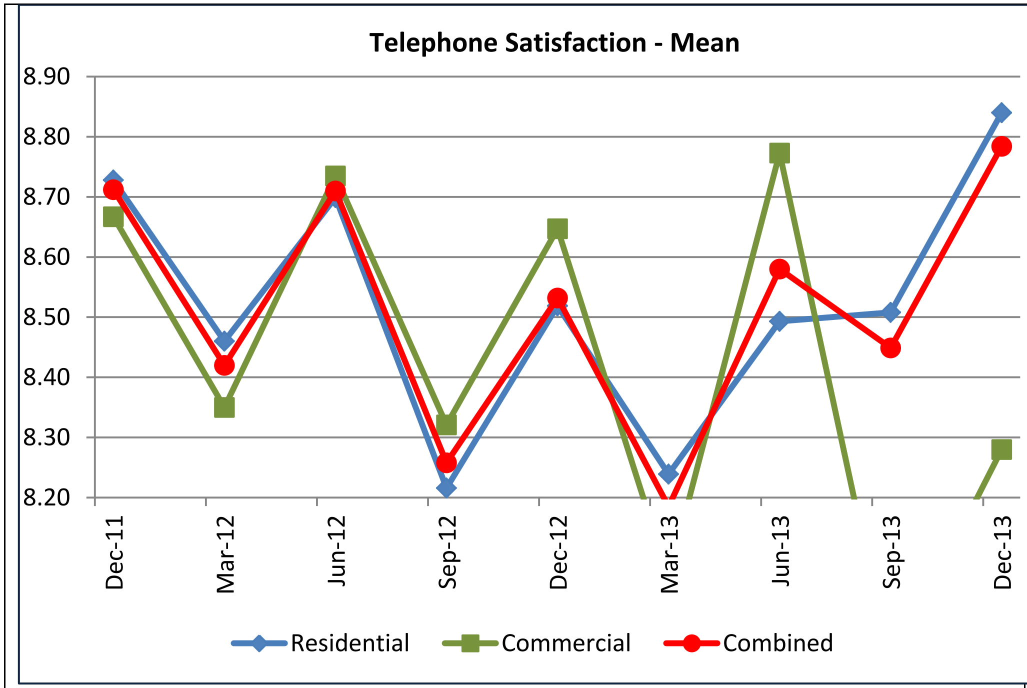


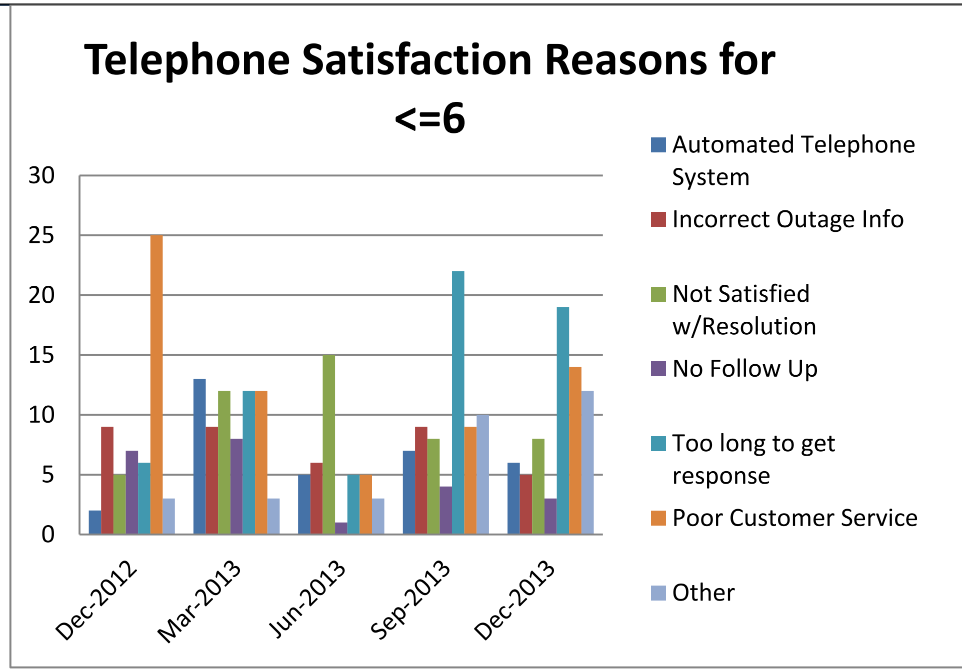
The overall satisfaction of Residential and Commercial customers is up this quarter from last quarter and the same quarter last year.

6.0 % (71) of customers surveyed gave a rating less than or equal to six. 35.2% indicated price concerns, 12.7% chose reliability/power outages 18.3% customer service issues – field related, 16.9% indicated other customer service issues and 9.9% identified billing and meter reading accuracy for the lower rating.

Verbatim comments relating to Customer Service Issues – Field related shows the primary concerns are wait times and lack of communication regarding technical and field work, and the difficulty in reaching a technical employee. Concerns are the same for both residential and commercial customers.

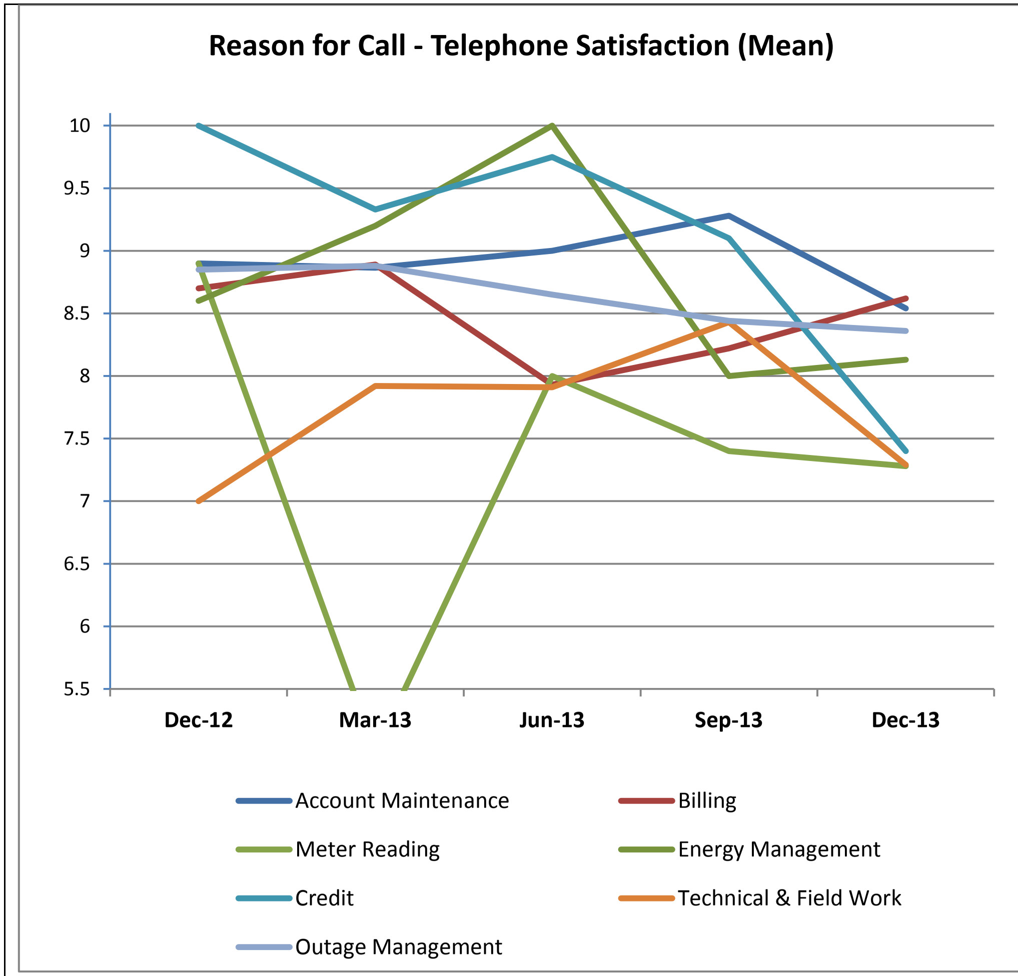
Other customers expressed doubt about the accuracy of their billing due to bills this year being higher compared to prior years.





The mean is a good indicator of telephone satisfaction for a given time period. One issue with the survey is the consistency of the telephone sample. Because the population is selected at random, the size of the sample is inconsistent making the confidence levels in the accuracy of each sample different.

Reasons for low telephone satisfaction ratings tend to fluctuate throughout the year. Frustration with technical inquiries remain prevalent though. The difficuty and long response times waiting to speak with a technical representative is becoming a bigger issue. People are also giving us low ratings in this area based on how long it is taking for us to complete their technical request(s).

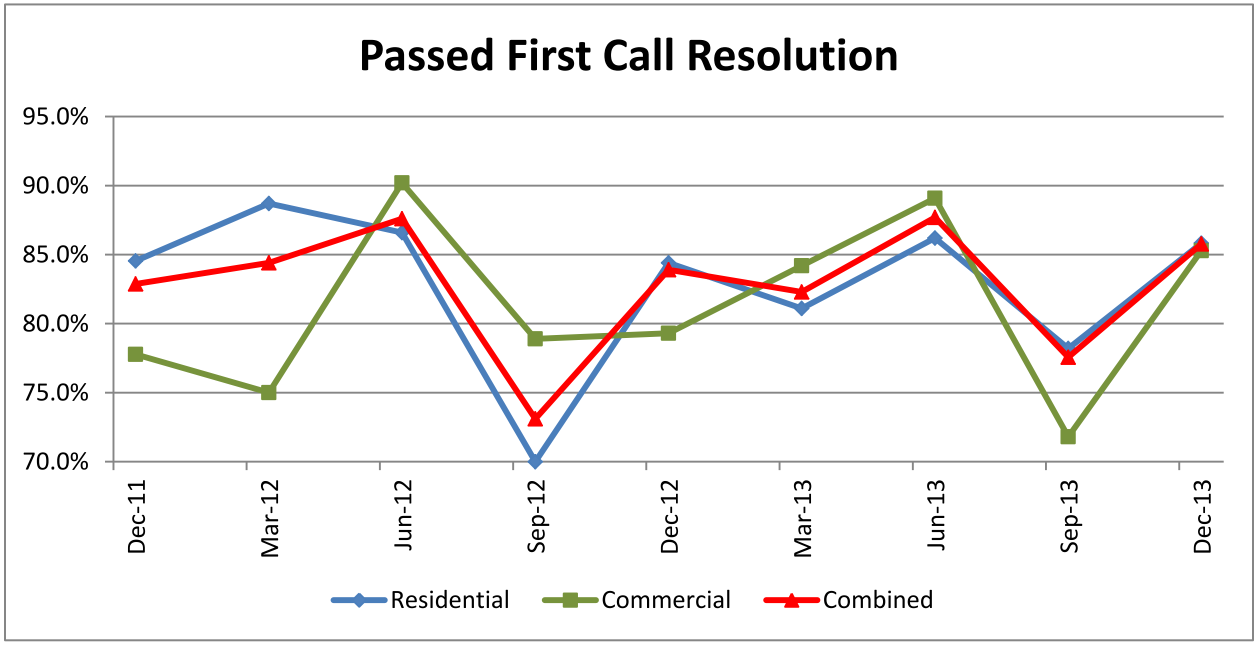


Telephone Satisfaction 26.6% (317) surveyed called in the last 6 mos.

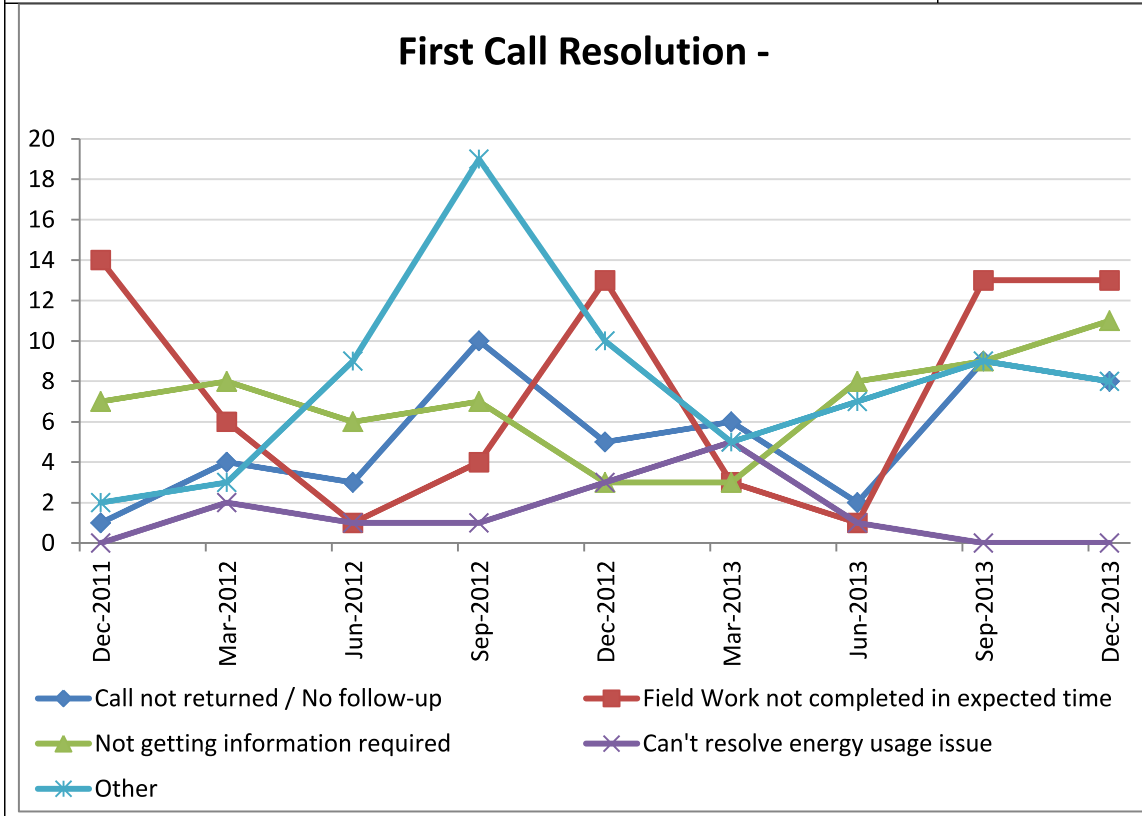
(Mean)	This Quarter	Last Quarter	Same Quarter Last Year
Residential	8.84	8.51	8.52
Commercial	8.28	7.92	8.65
Overall Total	8.78	8.45	8.53
7-10 Rating	% of customer's who called that gave a 7-10 rating.		
Residential	91.6%	84.9%	86.7%
Commercial	84.8%	80.5%	89.3%
Total	88.6%	83.4%	87.6%

The Overall Telephone Satisfaction rating is higher this quarter than last quarter and the same quarter last year. The percentage of customers giving a 7 or better rating was greater than last quarter and the same quarter last year.

11.4 % (36) gave < 7 rating compared to 16.62% (66) last quarter. 28.4% (19) were not satisfied with the length of time it took to get a response. A majority of the reasons people indicated they waited too long to get a response was due to wait times for technical and field work, including wait times to speak with a technologist. 20.9% (14) indicated poor customer service which included attitude and knowledge levels of employees.



A customer passes first call resolution (FCR) if they do not have to call back more than once for the same issue. We also measure this internally and that number has a tendency to be much higher than indicated in the satisfaction score. Some of the reasons for this are we measure FCR within a 45 day window internally, but a customer does not have a time limit when answering this question. Customers also could be calling about two separate issues but because they had to call us multiple times, they may perceive it differently than we would internally. Therefore the internal measure is a better indicator of our performance. The 2013 internal FCR number is 88.24%.

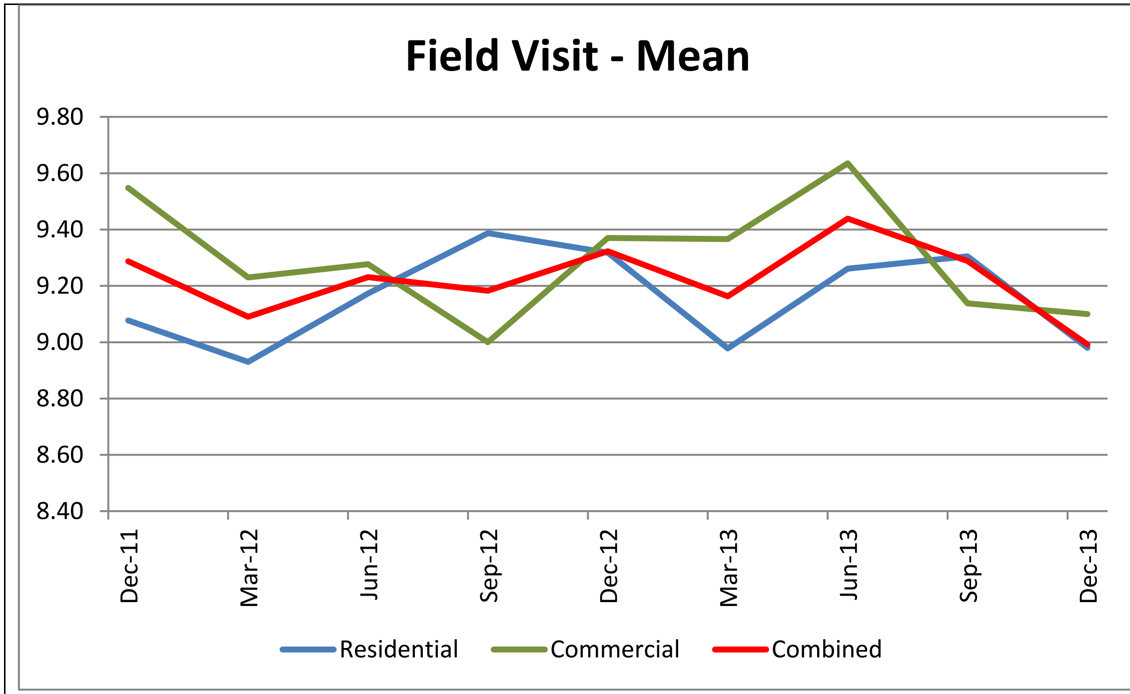


First Call Resolution - Percentage of customer's passed First Call Resolution.

	This Quarter	Last Quarter	Same Quarter Last Year
Residential	85.8%	78.2%	84.4%
Commercial	85.3%	71.8%	79.3%
Total	85.8%	77.6%	83.9%

Of the 188 customers that spoke to a Customer Account Representative, 85.6% had their issue resolved the first time and 14.4% had to call more than once. This compares to 24.2% last quarter and 17.5% the same quarter last year.

The main reasons given by customers who had to call more than once; 32.5% indicated “field work not completed in expected time” and 27.5% said “not getting information required”. This was a combination of technical and customer service staff complaints.



Field Visit Satisfaction 11.5% (137) surveyed had field visit in last 6 mos.

(Mean)	This Quarter	Last Quarter	Same Quarter Last Year
Residential	8.98	9.31	9.32
Commercial	9.10	9.14	9.37
Overall Total	8.99	9.29	9.32
7-10 Rating	% of customer's with a field visit gaving a 7-10 rating.		
Residential	96.2%	96.6%	98.8%
Commercial	94.8%	98.3%	96.3%
Overall Total	95.6%	97.4%	97.6%

The Overall Field Satisfaction rating was lower this quarter compared to last quarter and the same quarter last year.

Of the 117 customers that had a Field Visit in the last 6 months, 6 (4.4%) gave a rating < 7.

Newfoundland Power
Customer Satisfaction Survey
December 2013

SECTION 1: GENERAL SERVICE (gensat)

1. First, I would like to get your opinion of the overall service provided by Newfoundland Power. On a 10 point scale where 1 is "Not at all satisfied" and 10 is "Fully satisfied", how satisfied are you with the overall service provided by Newfoundland Power?

   1 2 3 4 5 6 7 8 9 10

IF RESPONSE IS 6 OR LESS GO TO QUESTION 2, ELSE GO TO QUESTION 3.

---

2. Can you tell me the main reason why you gave a rating of _____? (Bring answer from Q1) (gensatwy)

SECTION 2: CONTACT CENTRE SERVICE

3. Have you called Newfoundland Power within the past six months? (callast6)

   1. Yes **(Continue at Q4)**
   2. No **(Skip to Q10)**
   3. Don't know **(Skip to Q10)**

4. Overall, on a scale of 1 to 10, where 1 is "Not at all satisfied" and 10 is "Fully satisfied", how satisfied are you in general with the service you received by phone from Newfoundland Power?. (phnsat)

   1 2 3 4 5 6 7 8 9 10

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION 5, ELSE SKIP TO Q6

5. Can you tell me the main reason why you gave a rating of _____? (Bring answer from Q4) (phsatwhy)

6. Did you speak to a Customer Account Representative or did you call to get your account balance using the recorded telephone system, or did you call for recorded power outage information? (whatcald)

   1. Customer Account Representative **(Continue at Q7)**
   2. Automated Account System **(Skip to Q10)**
   3. Automated power outage information system **(Skip to Q10)**

7. What was the main reason for your recent call to Newfoundland Power?

DO NOT READ LIST. PROMPT IF NECESSARY. ACCEPT ALL APPROPRIATE RESPONSES. (Check boxes for multiple responses)

1. Account Maintenance (whycall1)
(New account hookup, moving to new address, closing an account, change of address, change of contact information etc.)

2. Billing (whycall2)
(billing adjustment, sign up for ebills or Equal payment plan or Automatic Payment Plan, ask about payment locations, ask a question about the bill)

3. Meter Reading (whycall4)
(Inquiry about a meter reading estimate, to provide a meter reading, to ask about access to meter or a meter change out)

4. Energy Management (whycal58)
(To ask how to reduce energy usage, find out about programs and rebates for thermostats, insulation or windows, to ask for energy efficiency advise)

5. Credit (whycall3)
(Find out balance owing on account, customers who are disconnected, customer who are in collection status and need to make payment arrangements)

6. Technical and Field work (whycl791)
(Inquiry about tree trimming, inquiry about a cabin hookup or powerline extensions, calls looking for a technician or is expecting a field visit from a technician or linesperson.)

7. Outage Management (whycl611)
(Outage information, report an outage, report a damaged or non-working streetlight)

(whycloth) **(whycltxt)**

IF 5, or 7 WAS CHECKED, SKIP TO QUESTION 10, ELSE CONTINUE QUESTION 8

8. Did the Newfoundland Power representative complete your request or resolve your issue the first time you called the Contact Centre? (firstme)

   1. Yes **(Skip to Q10)**
   2. No **(Continue at Q9)**

9. Can you tell me why you had to call more than once to have this issue resolved? (whymore)

Text box for 250 characters

SECTION 4: FIELD SERVICE

10. Have any of the following field representatives visited your home/business in the past six months? (whovisit)

   1. Customer Service Specialist (Continue at Question 11)
   2. Lineperson (Continue at Question 11)
   3. Technician (Continue at Question 11)
   4. Meter Person, NOT the Meter Reader (Continue at Question 11)
   5. Collector (Skip to Question 13) **or MISC Section 5 if it exists**
   6. None of the above **(Do not read) If "None of the above", skip to Q13**

11. Overall, on a scale of 1 to 10, where 1 is "Not at all satisfied" and 10 is "Fully satisfied", how would you rate the quality of service provided by the field representative? (ratevist)

   1 2 3 4 5 6 7 8 9 10

IF RESPONSE IS 6 OR LESS, GO TO QUESTION 12 ELSE GO TO QUESTION 13

12. Can you tell me the main reason why you gave a rating of _____? (whyrtvst)

D1. OBSERVE Gender of respondent (gender)

1. Male
2. Female

D2. Would you mind telling me into which of the following categories your age falls? (age)

1. 18 to 34
2. 35 to 49
3. 50 to 64
4. 65 or older

99 Refused (VOL)

D3. What is your Postal Code?

1) _________

2) Don’t Know
3) Prefer Not to say

THANK YOU VERY MUCH FOR YOUR HELP.

Q4 2013 Customer Satisfaction Survey (Transactional)

Newfoundland Power
Customer Satisfaction Transactional Surveys
-Contact Centre-
Final Pretest Version: Last Updated August 29, 2013

Hello, my name is ______ and I am calling from MQO Research, a Newfoundland-based research company. We are calling today/tonight on behalf of Newfoundland Power to conduct a short survey on customer satisfaction related to....

CONTACT CENTRE:
...a call made by you or someone in your <household/business or organization> to Newfoundland Power during the past month or so.

May I speak with **<Recall name and business name (as appropriate) from sample>**

RESIDENTIAL INTRO: **IF NO NAME IS PROVIDED:** May I speak with the person in your household who would have made the call? Depending on your responses the survey will take about 5-7 minutes to complete.

BUSINESS INTRO: **IF NO NAME IS PROVIDED:** May I speak with the person in your business/organization who made the call and is responsible for interacting with Newfoundland Power on behalf of your business or organization? Depending on your responses the survey will take about 5-7 minutes to complete.

Do you have a few minutes to answer my questions? Please be assured that all your responses will be kept strictly confidential.

IF NEW PERSON COMES ON THE LINE: REPEAT INTRODUCTION

Yes .... 1 **CONTINUE**
No .... 2 Is there a more convenient time for me to call back? ARRANGE FOR A CALLBACK OR THANK AND TERMINATE.

IF RESPONDENT AGREES TO CONTINUE, ADD: This call may be monitored for quality purposes.

**If necessary:* The purpose of this call is not to sell you anything.*

Continue...	1	
No..	2	*Thank & Terminate*
No, not available	3	*Arrange a call back*
No, someone else...........................	4	*Identify and Restart*

IF NOT AVAILABLE, ARRANGE FOR A CALLBACK.

VALIDITY RESPONSE:
If a respondent questions the validity of the survey, the call or our organization please state:

MQO Research has been conducting research studies in Canada and abroad for 30 years. We are a Member of the Canadian Marketing Research AND Intelligence Association (MRIA) which is responsible for regulating marketing research practices in Canada. MQO Research adheres very strictly to all guidelines of professionalism and privacy as outlined by the MRIA. This study is registered with the Association. If you would like to contact the MRIA to verify the legitimacy of this research study or our company please call 1-800-554-9996 toll free and reference survey Number: **0584.**

CONFIDENTIALITY RESPONSE:
If a respondent questions **the confidentiality** of the information that they are providing please state the following:

As a Corporate Gold Seal member of the Marketing Research Intelligence Association (MRIA) we adhere to strict standards of privacy and confidentiality. Our data is always grouped. Information will never be released to our client or any other third party in a manner that could be used to disclose your identity.

CONTACT INFORMATION RESPONSE:
If a respondent questions how MQO got their contact information please state the following:
As part of its on-going commitment to customer satisfaction, Newfoundland Power has provided MQO Research with a list of customers who had a transaction with the company over the past 3 months for the purpose of this survey. You were selected at random to participate in this survey. MQO follows the Marketing Research Intelligence Association's (MRIA's) strict privacy and protection of customer information guidelines, based on ensuring compliance with federal and provincial governments' privacy legislation.

If Necessary:
If respondent wishes to confirm the validity of the survey with Newfoundland Power provide them with the following contact information: If you would like to confirm the validity of the survey with Newfoundland Power, you can call **709-737-2802 locally or 1-800-663-2802 toll-free** and speak to an employee of Newfoundland Power.
[NOTE: Call centre at NF Power is open during regular business hours Monday to Friday 8:00 am to 5:00 pm]

Screening and Confirmation Questions:

S1. Do you, or anyone in your household currently work for NF Power?

Yes	1	**Thank and Terminate**
No	2	**Continue**

CONTACT CENTRE:

S2. According to information provided to us, you placed a call to Newfoundland Power on **<RECALL DATE>**. Is this correct?

Yes	1	**Continue**
No	2	**Thank and Terminate**

Section 1: General Service

1. First, I would like to get your opinion of the overall service provided by Newfoundland Power. On a 10 point scale where 1 is "Not at all satisfied" and 10 is "Fully satisfied", how satisfied are you with the overall service provided by Newfoundland Power? (gensat)

   1 2 3 4 5 6 7 8 9 10

   IF RESPONSE IS 6 OR LESS GO TO QUESTION 2, ELSE GO TO QUESTION 3.

2. Can you tell me the main reason why you gave a rating of _____**<Recall from Q1>?** (gensatwy)

Section 2: Contact Centre Service

3. ***[Programming note: Recall "wrap group" and "wrap description to screen ie. Recorded reason for call]*** On **<RECALL DATE>**, what was the main reason for your call to Newfoundland Power?

   DO NOT READ LIST. PROMPT IF NECESSARY. ACCEPT ALL APPROPRIATE RESPONSES. (Check boxes for multiple responses)

   1. Account Maintenance (whycall1)
   (New account hookup, moving to new address, closing an account, change of address, change of contact information etc.)
   2. Billing (whycall2)
   (billing adjustment, sign up for ebills or Equal payment plan or Automatic Payment Plan, ask about payment locations, ask a question about the bill)
   3. Meter Reading (whycall4)
   (Inquiry about a meter reading estimate, to provide a meter reading, to ask about access to meter or a meter change out)
   4. Energy Management (whycal58)
   (To ask how to reduce energy usage, find out about programs and rebates for thermostats, insulation or windows, to ask for energy efficiency advise)
   5. Credit (whycall3)
   (Find out balance owing on account, customers who are disconnected, customer who are in collection status and need to make payment arrangements)
   6. Technical and Field work (whycl791)
   (Inquiry about tree trimming, inquiry about a cabin hookup or powerline extensions, calls looking for a technician or is expecting a field visit from a technician or linesperson.)
   7. Outage Management (whycl611)
   (Outage information, report an outage, report a power emergency, report a damaged or non-working streetlight)
   8. Other (specify) (whycloth) (whycltxt)

REPRESENTATIVE(S)

4. Now, thinking about the Newfoundland Power representative(s) you spoke with on the phone, how would you rate your satisfaction towards the employee(s) who handled your call in terms of:

INTERVIEWER: If spoke to more than 1 employee, use the plural form

**If respondent talks about on-site visits by technicians, probe:* But if you consider only the part handled over the telephone to make your request, how satisfied are you with the representative you dealt with in terms of?*

**If respondent comments about satisfied with some but not others, probe:* But, overall, considering all of the representatives you dealt with to make your request, how satisfied were you with them in overall?*

Random order

a)	Being courteous and polite	(1-10) NA/DK-99
b)	Being respectful	(1-10) NA/DK-99
c)	Making you feel like a valued customer	(1-10) NA/DK-99
d)	taking the necessary time to understand your needs	(1-10) NA/DK – 99
e)	providing thorough and accurate information in response to your questions	(1-10) NA/DK – 99

5. Now, considering all the aspects we just mentioned as well as anything else you might think of, **overall** how satisfied were you with the quality of service provided by the Newfoundland Power representative(s) you dealt with on this call?

INTERVIEWER: If spoke with more than one employee, use the plural form

**If respondent starts to comment about satisfied with some but not others, probe:* *But, overall, considering all of the representatives you dealt with to make your request, how satisfied were you with them overall?*

______.................................... (1-10)
NA / DK.................................. 99 *Go to Q7*

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION 6, ELSE SKIP TO Q7

6. Can you tell me the main reason why you gave a rating of _____<**Recall from Q5**>

7. How satisfied would you be to speak with this/these representative(s) again during your next telephone inquiry? **[Interviewer – repeat scale as necessary, 1 means “not at all satisfied” and 10 means “fully satisfied”]**

1 2 3 4 5 6 7 8 9 10 Don’t Know

8. On a scale of 1-10, how satisfied were you with the time you had to wait before you were able to speak with a representative?

1 2 3 4 5 6 7 8 9 10 Don't Know

9. Did the Newfoundland Power representative(s) complete your request or resolve your issue the first time you called?

1. Yes **(Skip to Question 11)**
2. No **(Continue at Question 10)**

10. Can you tell me why you had to call more than once to have this issue resolved?

Section 3: Other Forms of Customer Service

Automated Power Outages System

11. During the past month, have you called Newfoundland Power's Power Outages & Emergencies line?

[Interviewer, if required: the number is 737-5711 or toll free 1-800-474-5711]

1. Yes **(Continue to Question 12)**
2. No **(Go to question 13)**

12. Now, thinking about the time(s) that you called this telephone line, how would you rate your satisfaction in terms of:

a)	Your ability to get the information you were seeking	(1-10) NA/DK-99
b)	Timeliness of updates	(1-10) NA/DK-99

Other Methods of Contact

13. Did you use any of the following methods to contact Newfoundland Power within the past month?

Read List	**Yes**	**No**	**DK**
a) E-mail	1	2	9
b) Visit(s) to the newfoundlandpower.com website	1	2	9
c) Social Media such as Twitter/Face Book or LinkedIn	1	2	9
d) In-person	1	2	9

14. **For each mention in Q13a-d above:** How satisfied were you with your **<Recall from Q13>** method of contact? **[*Interviewer – repeat scale as necessary]***

1	2	3	4	5	6	7	8	9	10	Don't Know

Section 4: Website Services

[Check: IF Q13b website=yes, continue; otherwise go to Demographics]

15. How often do you visit newfoundlandpower.com per month?
    1-2 times
    3-5 times
    5-10 times
    more than 10 times
    Don't Know

16. What was the main reason for your visit(s) to newfoundlandpower.com during the last month? Were there any other reasons?

DO NOT READ LIST. RECORD Main and Other Reasons separately

	MAIN	**OTHER**
To get information on my bill	01	1
To change account information	02	1
To fill out forms	03	1
To get information on power outage	04	1
To review my usage history	05	1
To get phone number to call customer service	06	1
Other (specify) ______________________________		

17. Now, thinking about your visit(s) to newfoundlandpower.com during the past month, were you:

a) able to complete everything you wanted to do online, without having to call Newfoundland Power? YES/NO/NA_DK-99

a_1) **If Yes in 17a,** were you able to complete your request or find your information easily? YES/NO/NA_DK-99

a_2) **If No in 17a**, what else would you like to have done or what did you have to call about? (Specify)

b) If your inquiry required a response, did you receive one in a timely manner? YES/NO/NA_DK-99

18. Overall, on a scale from 1 to 10, where 1 is not at all satisfied and 10 is fully satisfied, how satisfied are you with newfoundlandpower.com ?

1 2 3 4 5 6 7 8 9 10

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION 19, ELSE SKIP TO Q20

19. Can you tell me the main reason why you gave a rating of _____? <**Recall from Q18**>

20. What, if anything, would you like to see or be able to do on newfoundlandpower.com?

Section 5: Demographic Information

D1. OBSERVE Gender of respondent (gender)

1. Male
2. Female

D2. Would you mind telling me into which of the following categories your age falls? (age)

1. 18 to 34
2. 35 to 49
3. 50 to 64
4. 65 or older

99 Refused (VOL)

D3. What is your Postal Code?

1) __________
2) Don't Know
3) Prefer Not to say

That is the end of my questions.

THANK YOU VERY MUCH FOR YOUR HELP TODAY.

S1: Do you, or anyone in your household currently work for NF Power?

	Total	Type	
		Business	Residential
Total Unweighted (n)	802	300	502
No	100%	100%	100%

S2: According to information provided to us, you placed a call to Newfoundland Power on <RECALL DATE>. Is this correct?

	Total	Type	
		Business	Residential
Total Unweighted (n)	802	300	502
Yes	67%	80%	67%
Recall call but not date	33%	20%	33%

Q1: How satisfied are you with the overall service provided by Newfoundland Power?

	Total	Type	
		Business	Residential
Total Unweighted (n)	802	300	502
1 - Not at all satisfied	3%	2%	3%
2	1%	1%	1%
3	1%	0%	1%
4	1%	1%	1%
5	3%	4%	3%
6	3%	2%	3%
7	7%	10%	6%
8	17%	21%	17%
9	10%	16%	9%
10 - Fully satisfied	55%	43%	55%
Don't know (VOL)	0%	0%	0%
% 9 or higher	64%	58%	65%
Mean	8.6	8.5	8.6
N (valid responses)	801	300	501

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

**Q2: Can you tell me the main reason why you gave a rating of ___?
SUBSET: If rating is 6 or less.**

	Total	Type	
		Business	Residential
Total Unweighted (n)	92	30	62
Other (Please Specify)	98%	100%	98%
Don't know (VOL)	2%	0%	2%

Q3: On <RECALL DATE>, what was the main reason for your call to Newfoundland Power?

	Total	Type	
		Business	Residential
Total Unweighted (n)	802	300	502
Billing (billing adjustment, sign up for ebills or Equal payment plan or Automatic Payment Plan, ask about payment	31%	15%	32%
Account Maintenance (New account hookup, moving to new address, closing an account, change of address, change of	23%	26%	23%
Credit (Find out balance owing on account, customers who are disconnected, customer who are in collection status	19%	11%	19%
Technical and Field work (Inquiry about tree trimming, inquiry about a cabin hookup or powerline extensions, call	12%	21%	11%
Outage Management (Outage information, report an outage, report a power emergency, report a damaged or non--working	10%	26%	9%
Don't know (VOL)	4%	1%	4%
Meter Reading (Inquiry about a meter reading estimate, to provide a meter reading, to ask about access to meter o	4%	3%	4%
Energy Management (To ask how to reduce energy usage, find out about programs and rebates for thermostats, insulate	3%	1%	3%
Other (Please Specify)	2%	1%	2%

Q4: Now, thinking about the Newfoundland Power representative(s) you spoke with on the phone, how would you rate your satisfaction towards the employee(s) who handled your call in terms of:

		Total	Type	
			Business	Residential
Total Unweighted (n)		802	300	502
Being courteous and polite	1 - Not at all satisfied	1%	0%	1%
	2	0%	0%	0%
	3	0%	0%	0%
	4	0%	1%	0%
	5	1%	1%	1%
	6	1%	0%	1%
	7	1%	4%	1%
	8	7%	10%	7%
	9	9%	14%	9%
	10 - Fully satisfied	79%	71%	79%
	Refused	0%	0%	0%
	Don't know	0%	0%	0%
Being respectful	1 - Not at all satisfied	1%	0%	1%
	2	0%	0%	0%
	3	0%	0%	0%
	4	0%	1%	0%
	5	0%	0%	0%
	6	1%	1%	1%
	7	2%	3%	2%
	8	7%	8%	7%
	9	9%	15%	9%
	10 - Fully satisfied	79%	72%	79%
	Refused	0%	0%	0%
	Don't know	0%	0%	0%

Making you feel like a valued customer	1 - Not at all satisfied	2%	1%	2%
	2	0%	0%	0%
	3	0%	0%	0%
	4	1%	1%	1%
	5	1%	2%	1%
	6	2%	2%	2%
	7	3%	5%	3%
	8	9%	10%	9%
	9	9%	16%	9%
	10 - Fully satisfied	73%	62%	73%
	Refused	1%	0%	1%
	Don't know	0%	2%	0%
taking the necessary time to understand your needs	1 - Not at all satisfied	1%	0%	1%
	2	0%	0%	0%
	3	0%	0%	0%
	4	0%	1%	0%
	5	1%	2%	1%
	6	1%	1%	1%
	7	3%	3%	3%
	8	9%	12%	9%
	9	10%	17%	10%
	10 - Fully satisfied	73%	63%	73%
	Refused	0%	0%	0%
	Don't know	0%	1%	0%
providing thorough and accurate information in response to your questions	1 - Not at all satisfied	2%	1%	2%
	2	1%	0%	1%
	3	1%	0%	1%
	4	0%	1%	0%
	5	2%	3%	2%
	6	2%	1%	2%
	7	2%	3%	2%
	8	6%	12%	6%
	9	10%	17%	10%
	10 - Fully satisfied	72%	60%	73%
	Refused	0%	0%	0%
	Don't know	1%	2%	1%

**Q4: Now, thinking about the Newfoundland Power representative(s) you spoke with on the phone, how would you rate your satisfaction towards the employee(s) who handled your call in terms of:
% 9 or higher**

	Total	Type	
		Business	Residential
Being courteous and polite	88%	85%	89%
Being respectful	89%	87%	89%
Making you feel like a valued customer	83%	80%	83%
taking the necessary time to understand your needs	84%	81%	84%
providing thorough and accurate information in response to your questions	84%	78%	84%

Refusals and Don't knows have been excluded.

**Q4: Now, thinking about the Newfoundland Power representative(s) you spoke with on the phone, how would you rate your satisfaction towards the employee(s) who handled your call in terms of:
Mean Values**

		Total	Type	
			Business	Residential
Being courteous and polite	N	797	299	498
	Mean	9.5	9.5	9.5
Being respectful	N	798	299	499
	Mean	9.6	9.5	9.6
Making you feel like a valued customer	N	791	294	497
	Mean	9.3	9.2	9.3
taking the necessary time to understand your needs	N	794	296	498
	Mean	9.4	9.3	9.4
providing thorough and accurate information in response to your questions	N	790	293	497
	Mean	9.2	9.1	9.2

Q5: Now, considering all the aspects we just mentioned as well as anything else you might think of, overall how satisfied were you with the quality of service provided by the NL Power representative(s) you dealt with on this call?

	Total	Type	
		Business	Residential
Total Unweighted (n)	802	300	502
1 - Not at all satisfied	1%	0%	1%
2	1%	1%	1%
3	1%	1%	1%
4	1%	1%	1%
5	1%	1%	1%
6	2%	2%	2%
7	3%	1%	3%
8	7%	13%	6%
9	12%	17%	12%
10 - Fully satisfied	73%	63%	73%
Refused (VOL)	0%	0%	0%
Don't know (VOL)	0%	0%	0%
% 9 or higher	85%	80%	85%
Mean	9.3	9.2	9.3
N (valid responses)	799	300	499

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q6: Can you tell me the main reason why you gave a rating of _____?
SUBSET: If rating is 6 or less.

	Total	Type	
		Business	Residential
Total Unweighted (n)	47	18	29
Other (Please Specify)	97%	100%	97%
Don't know (VOL)	3%	0%	3%

Q7: How satisfied would you be to speak with this/these representative(s) again during your next telephone inquiry?

	Total	Type	
		Business	Residential
Total Unweighted (n)	802	300	502
1 - Not at all satisfied	2%	1%	2%
2	0%	0%	0%
3	0%	0%	0%
4	0%	0%	0%
5	1%	0%	1%
6	2%	0%	2%
7	2%	3%	2%
8	6%	9%	5%
9	7%	14%	7%
10 - Fully satisfied	80%	71%	80%
Don't know (VOL)	1%	1%	1%
% 9 or higher	87%	86%	87%
Mean	9.4	9.4	9.4
N (valid responses)	797	298	499

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q8: On a scale of 1-10, how satisfied were you with the time you had to wait before you were able to speak with a representative?

	Total	Type	
		Business	Residential
Total Unweighted (n)	802	300	502
1 - Not at all satisfied	1%	0%	1%
2	0%	1%	0%
3	0%	0%	0%
4	1%	1%	1%
5	2%	4%	2%
6	3%	3%	3%
7	6%	10%	6%
8	17%	19%	17%
9	12%	17%	12%
10 - Fully satisfied	50%	42%	50%
Don't know (VOL)	6%	3%	6%
% 9 or higher	66%	61%	67%
Mean	8.8	8.7	8.8
N (valid responses)	760	290	470

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q9: Did the Newfoundland Power representative(s) complete your request or resolve your issue the first time you called?

	Total	Type	
		Business	Residential
Total Unweighted (n)	802	300	502
Yes	87%	77%	87%
No	11%	20%	10%
Refused (VOL)	0%	0%	0%
Don't know (VOL)	2%	4%	2%

Q10: Can you tell me why you had to call more than once to have this issue resolved?
SUBSET: If request/issue wasn't resolved in one call.

	Total	Type	
		Business	Residential
Total Unweighted (n)	111	59	52
Other (Please Specify)	96%	98%	96%
Don't know (VOL)	4%	2%	4%

Q10b: How satisfied were you with the service you received by phone from Newfoundland Power?

	Total	Type	
		Business	Residential
Total Unweighted (n)	802	300	502
1 - Not at all satisfied	2%	0%	2%
2	1%	1%	1%
3	0%	0%	0%
4	0%	1%	0%
5	2%	3%	2%
6	2%	2%	2%
7	5%	4%	5%
8	13%	19%	13%
9	11%	19%	11%
10 - Fully satisfied	63%	50%	64%
Refused (VOL)	0%	0%	0%
Don't know (VOL)	0%	1%	0%
% 9 or higher	75%	69%	75%
Mean	9.0	8.9	9.0
N (valid responses)	797	298	499

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q11: During the past month, have you called Newfoundland Power's Power Outages & Emergencies line?

	Total	Type	
		Business	Residential
Total Unweighted (n)	802	300	502
Yes	13%	17%	13%
No	85%	81%	85%
Don't know (VOL)	1%	2%	1%

Q12: Now, thinking about the time(s) that you called this telephone line, how would you rate your satisfaction in terms of:
SUBSET: Those who called NL Power's Power Outages & Emergencies line.

		Total	Type	
			Business	Residential
Total Unweighted (n)		118	52	66
Your ability to get the information you were seeking	1 - Not at all satisfied	5%	4%	5%
	2	2%	4%	2%
	3	3%	0%	3%
	4	1%	0%	2%
	5	5%	10%	5%
	6	5%	4%	5%
	7	7%	6%	8%
	8	23%	27%	23%
	9	7%	13%	6%
	10 - Fully satisfied	40%	27%	41%
	Don't know	3%	6%	3%
Timeliness of updates	1 - Not at all satisfied	6%	6%	6%
	2	2%	4%	2%
	3	3%	2%	3%
	4	4%	0%	5%
	5	6%	8%	6%
	6	2%	12%	2%
	7	6%	4%	6%
	8	13%	29%	12%
	9	12%	6%	12%
	10 - Fully satisfied	39%	25%	39%
	Don't know	7%	6%	8%

**Q12: Now, thinking about the time(s) that you called this telephone line, how would you rate your satisfaction in terms of:
% 9 or higher
SUBSET: Those who called NL Power's Power Outages & Emergencies line.**

	Total	Type	
		Business	Residential
Your ability to get the information you were seeking	48%	43%	48%
Timeliness of updates	54%	33%	56%

Refusals and Don't knows have been excluded.

**Q12: Now, thinking about the time(s) that you called this telephone line, how would you rate your satisfaction in terms of:
SUBSET: Those who called NL Power's Power Outages & Emergencies line.
Mean Values**

		Total	Type	
			Business	Residential
Your ability to get the information you were seeking	N	113	49	64
	Mean	7.9	7.7	8.0
Timeliness of updates	N	110	49	61
	Mean	7.7	7.3	7.8

Q13: Did you use any of the following methods to contact Newfoundland Power within the past month?

		Total	Type	
			Business	Residential
Total Unweighted (n)		802	300	502
E-mail	Yes	4%	9%	3%
	No	96%	91%	97%
Visit(s) to the newfoundlandpower.com website	Yes	19%	18%	19%
	No	81%	82%	81%
	Don't know	0%	0%	0%
Social Media	Yes	3%	2%	3%
	No	96%	98%	96%
	Don't know	1%	0%	1%
In-person	Yes	6%	5%	6%
	No	94%	95%	94%
	Don't know	0%	0%	0%

Q14: How satisfied were you with following method(s) of contact?
SUBSET: Those who use these methods.

		Total	Type	
			Business	Residential
Total (n)		44	27	17
E-mail	1 - Not at all satisfied	5%	0%	6%
	6	1%	11%	0%
	7	11%	4%	12%
	8	18%	19%	18%
	9	2%	15%	0%
	10 - Fully satisfied	58%	52%	59%
	Don't know	5%	0%	6%
Total (n)		148	55	93
Visit(s) to the newfoundlandpower.com website	1 - Not at all satisfied	2%	0%	2%
	2	1%	2%	1%
	4	2%	0%	2%
	5	3%	2%	3%
	6	2%	4%	2%
	7	11%	11%	11%
	8	19%	29%	18%
	9	11%	16%	11%
	10 - Fully satisfied	49%	33%	49%
	Don't know	0%	4%	0%
Total (n)		21	7	14
Social Media	1 - Not at all satisfied	7%	0%	7%
	4	1%	14%	0%
	5	7%	0%	7%
	6	1%	14%	0%
	7	14%	0%	14%
	8	8%	29%	7%
	9	1%	14%	0%
	10 - Fully satisfied	63%	29%	64%
Total (n)		44	16	28
In-person	1 - Not at all satisfied	4%	6%	4%
	3	3%	0%	4%
	6	0%	6%	0%
	7	4%	13%	4%
	8	17%	0%	18%
	9	4%	19%	4%
	10 - Fully satisfied	67%	56%	68%

Q14: How satisfied were you with following method(s) of contact?
SUBSET: Those who use these methods.
% 9 or higher

	Total	Type	
		Business	Residential
E-mail	63%	67%	63%
Visit(s) to the newfoundlandpower.com website	60%	51%	60%
Social Media	63%	43%	64%
In-person	72%	75%	71%

Refusals and Don't knows have been excluded.

Q14: How satisfied were you with following method(s) of contact?
SUBSET: Those who use these methods.
Mean Values

		Total	Type	
			Business	Residential
E-mail	N	43	27	16
	Mean	8.7	8.9	8.7
Visit(s) to the newfoundlandpower.com website	N	146	53	93
	Mean	8.5	8.5	8.5
Social Media	N	21	7	14
	Mean	8.4	7.9	8.4
In-person	N	44	16	28
	Mean	8.9	8.6	8.9

Q15: How often do you visit newfoundlandpower.com per month?
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Business	Residential
Total Unweighted (n)	148	55	93
Less than once per month	54%	55%	54%
1-2 times	33%	27%	33%
3-5 times	9%	11%	9%
6-10 times	2%	2%	2%
More than 10 times	1%	4%	1%
Don't know (VOL)	1%	2%	1%

Q16a: What was the main reason for your visit(s) to newfoundlandpower.com during the last month?
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Business	Residential
Total Unweighted (n)	148	55	93
To get information on my bill	26%	16%	27%
To change account information	4%	0%	4%
To fill out forms	0%	2%	0%
To get information on power outage	47%	60%	46%
To review my usage history	1%	0%	1%
To get phone number to call customer service	7%	5%	8%
Other (Please Specify)	14%	16%	14%

Q16b: Were any other reasons?
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Business	Residential
Total Unweighted (n)	148	55	93
No other reason (VOL)	77%	82%	76%
Other (Please Specify)	8%	7%	8%
To get information on power outage	6%	4%	6%
To get information on my bill	6%	2%	6%
To get phone number to call customer service	1%	4%	1%
To review my usage history	1%	2%	1%
To fill out forms	1%	0%	1%
Don't know (VOL)	1%	0%	1%

Q16a/Q16b combined:
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Business	Residential
Total Unweighted (n)	148	55	93
To get information on power outage	53%	64%	53%
To get information on my bill	33%	18%	33%
Other (Please Specify)	22%	24%	22%
To get phone number to call customer service	9%	9%	9%
To change account information	4%	0%	4%
To review my usage history	2%	2%	2%
To fill out forms	1%	2%	1%

Q17a: Now, thinking about your visit(s) to newfoundlandpower.com during the past month, were you able to complete everything you wanted to do online, without having to call Newfoundland Power?
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Business	Residential
Total Unweighted (n)	148	55	93
Yes	69%	71%	69%
No	29%	25%	29%
Don't know (VOL)	2%	4%	2%

Q17a1: Were you able to complete your request or find your information easily?
SUBSET: Those who completed everything online.

	Total	Type	
		Business	Residential
Total Unweighted (n)	103	39	64
Yes	92%	95%	92%
No	8%	5%	8%

**Q17a2: What else would you like to have done or what did you have to call about?
SUBSET: Those who were not able to complete everything online.**

	Total	Type	
		Business	Residential
Total Unweighted (n)	45	16	29
Other (Please Specify)	90%	94%	90%
Don't know (VOL)	7%	6%	7%
Refused (VOL)	3%	0%	3%

**Q17b: If your inquiry required a response, did you receive one in a timely manner?
SUBSET: Those who visit newfoundlandpower.com and required a response.**

	Total	Type	
		Business	Residential
Total Unweighted (n)	69	19	50
Yes	88%	89%	88%
No	6%	11%	6%
Refused (VOL)	2%	0%	2%
Don't know (VOL)	4%	0%	4%

**Q18: Overall, on a scale from 1 to 10, where 1 is not at all satisfied and 10 is fully satisfied, how satisfied are you with newfoundlandpower.com?
SUBSET: Those who visit newfoundlandpower.com.**

	Total	Type	
		Business	Residential
Total Unweighted (n)	148	55	93
1 - Not at all satisfied	1%	0%	1%
2	0%	2%	0%
4	1%	2%	1%
5	3%	0%	3%
6	2%	4%	2%
7	13%	9%	13%
8	18%	33%	17%
9	15%	20%	15%
10 - Fully satisfied	47%	31%	47%
% 9 or higher	62%	51%	62%
Mean	8.7	8.5	8.7
N (valid responses)	148	55	93

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q19: Can you tell me the main reason why you gave a rating of _____?
SUBSET: If rating is 6 or less.

	Total	Type	
		Business	Residential
Total Unweighted (n)	11	4	7
Other (Please Specify)	100%	100%	100%

Q20: What, if anything, would you like to see or be able to do on newfoundlandpower.com?
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Business	Residential
Total Unweighted (n)	148	55	93
Nothing (VOL)	60%	58%	60%
Other (Please Specify)	29%	35%	29%
Don't know (VOL)	11%	7%	11%

D2: Would you mind telling me into which of the following categories your age falls?

	Total	Type	
		Business	Residential
Total Unweighted (n)	802	300	502
18 to 34	20%	12%	21%
35 to 49	31%	40%	30%
50 to 64	31%	35%	31%
65 or older	17%	10%	18%
Refused (VOL)	0%	2%	0%

Gender:

	Total	Type	
		Business	Residential
Total Unweighted (n)	802	300	502
Male	36%	54%	35%
Female	64%	46%	65%

Newfoundland Power
Customer Satisfaction Transactional Surveys
-Field Visits-

Hello, my name is ______ and I am calling from MQO Research, a Newfoundland-based research company. We are calling today/tonight on behalf of Newfoundland Power to conduct a short survey on customer satisfaction related to....

Field Representative/Technician Visit:
…a recent visit from a Newfoundland Power Field Representative to your <home/business> in the past month or so.

RESIDENTIAL INTRO: May I speak with the person your household who dealt with the Newfoundland Power Field Representative? Depending on your responses the survey will take about 5-7 minutes to complete.

BUSINESS INTRO: May I speak with the person in your business/organization who dealt with the Newfoundland Power Field Representative? Depending on your responses the survey will take about 5-7 minutes to complete.

Do you have a few minutes to answer my questions? Please be assured that all your responses will be kept strictly confidential.

IF NEW PERSON COMES ON THE LINE: REPEAT INTRODUCTION

Yes ....1 **CONTINUE**
No ....2 Is there a more convenient time for me to call back? ARRANGE FOR A CALLBACK OR THANK AND TERMINATE.

IF RESPONDENT AGREES TO CONTINUE, ADD: This call may be monitored for quality purposes.

**If necessary:* The purpose of this call is not to sell you anything.*

Continue..1
No...2 *Thank & Terminate*
No, not available ....3 *Arrange a call back*
No, someone else...........................4 *Identify and Restart*

IF NOT AVAILABLE, ARRANGE FOR A CALLBACK.

VALIDITY RESPONSE:
If a respondent questions the validity of the survey, the call or our organization please state:

MQO Research has been conducting research studies in Canada and abroad for 30 years. We are a Member of the Canadian Marketing Research AND Intelligence Association (MRIA) which is responsible for regulating marketing research practices in Canada. MQO Research adheres very strictly to all guidelines of professionalism and privacy as outlined by the MRIA. This study is registered with the Association. If you would like to contact the MRIA to verify the legitimacy of this research study or our company please call 1-800-554-9996 toll free and reference survey Number: **0584.**

CONFIDENTIALITY RESPONSE:
If a respondent questions **the confidentiality** of the information that they are providing please state the following:

As a Corporate Gold Seal member of the Marketing Research Intelligence Association (MRIA) we adhere to strict standards of privacy and confidentiality. Our data is always grouped. Information will never be released to our client or any other third party in a manner that could be used to disclose your identity.

CONTACT INFORMATION RESPONSE:
If a respondent questions how MQO got their contact information please state the following:
As part of its on-going commitment to customer satisfaction, Newfoundland Power has provided MQO Research with a list of customers who had a transaction with the company over the past 3 months for the purpose of this survey. You were selected at random to participate in this survey. MQO follows the Marketing Research Intelligence Association's (MRIA's) strict privacy and protection of customer information guidelines, based on ensuring compliance with federal and provincial governments' privacy legislation.

If Necessary:
If respondent wishes to confirm the validity of the survey with Newfoundland Power provide them with the following contact information: If you would like to confirm the validity of the survey with Newfoundland Power, you can call **709-737-2802 locally or 1-800-663-2802 toll-free** and speak to an employee of Newfoundland Power.
[NOTE: Call centre at NF Power is open during regular business hours Monday to Friday 8:00 am to 5:00 pm]

Screening and Confirmation Questions:

S1. Do you, or anyone in your household currently work for NF Power?

Yes	1	Thank and Terminate
No	2	Continue

FIELD REPRESENTATIVE VISIT:

S2. According to information provided to us, you received a visit from a Newfoundland Power Field Representative on <RECALL DATE>. Is this correct?

Yes	1	Continue
No	2	Thank and Terminate
DK	9	Thank and Terminate

Section 1: General Service

1. First, I would like to get your opinion of the overall service provided by Newfoundland Power. On a 10 point scale where 1 is "Not at all satisfied" and 10 is "Fully satisfied", how satisfied are you with the overall service provided by Newfoundland Power?

   1 2 3 4 5 6 7 8 9 10

   IF RESPONSE IS 6 OR LESS GO TO QUESTION 2, ELSE GO TO QUESTION 3.

2. Can you tell me the main reason why you gave a rating of _____**<Recall from Q1>?**

Section 2: Field Services

The next series of questions relate to your visit by a Newfoundland Power Field Representative.

3. Did you meet with the Newfoundland Power field representative in person?
   1. Yes **(Go to Q4)**
   2. No **(Continue)**

3b. Even if you did not deal with the Newfoundland Power field representative in person, there are some aspects of the quality of service provided by the representative that you could evaluate. ***(Go to Q4e)***

TECHNICIANS/FIELD REPS

4. Using a scale of 1 to 10, where 1 is "Not at all satisfied" and 10 is "Fully satisfied", how satisfied were you with the quality of service provided by the field representative who came to your <house/business> in terms of …

IF NECESSARY:

**If respondent starts to comment about satisfied with some but not others, probe:* But, overall, considering both / all of the field representatives that came to your location to work on your request, how satisfied were you with them overall, in terms of the following:?*

Go to Demographics if respondent is not able to evaluate field representative

Random order (a-d) and (e-g) as separate groups

a) Being courteous and polite	(1-10) NA/DK-99
b) Being respectful	(1-10) NA/DK-99
c) Making you feel like a valued customer	(1-10) NA/DK-99
d) Being knowledgeable	
e) Keeping you up to date on the status of your work order	(1-10) NA/DK-99
f) Completing the work in a timely manner	(1-10) NA/DK-99
g) Leaving your premises in good condition	(1-10) NA/DK-99
h) Being able to deal with any issue you had	(1-10) NA/DK-99

5. Now, considering all the aspects we just mentioned as well as anything else you might think of, using the same scale, **overall** how satisfied were you with the quality of service provided by the Newfoundland Power **field representative(s)** that came to your <house/business>?
   _______..................................... (1-10)
   NA / DK.................................. 99

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION 5, ELSE SKIP TO Q7

6. Can you tell me the main reason why you gave a rating of _____? <**Recall from Q4**>

7. How satisfied would you be to have this/these field representative(s)/technician(s) visit your <home/business> again should you have another request that required a visit? **[Interviewer – repeat scale as necessary, 1 means "not at all satisfied" and 10 means "fully satisfied"]**

   1 2 3 4 5 6 7 8 9 10 Don't Know

8. On a scale of 1-10, how satisfied were you with the time you had to wait between when you called for your request and when a field representative was able to meet with you to handle your request?

   1 2 3 4 5 6 7 8 9 10 Don't Know

Section 4: Other Forms of Customer Service

Other Methods of Contact

9. Did you use any of the following methods to contact or interact with Newfoundland Power within the past month?

Read List	**Yes**	**No**	**DK**
a) E-mail	1	2	9
b) Visit(s) to the newfoundlandpower.com website	1	2	9
c) Social Media such as Twitter/Face Book or LinkedIn	1	2	9
d) In-person	1	2	9
e) Telephone	1	2	9

10. **For each YES mention in Q10a, c or d above:** How satisfied were you with following method(s) of contact? **[*Interviewer – repeat scale as necessary*]**

   1 2 3 4 5 6 7 8 9 10 Don't Know

Telephone Contact

[Check: IF Q10e: telephone=yes, continue; otherwise go to Q16]:

You mentioned you contacted Newfoundland Power by telephone within the past month.

11. Now, thinking about the Newfoundland Power representative(s) you spoke with on the phone, how would you rate your satisfaction towards the employee(s) who handled your call in terms of:

INTERVIEWER: If spoke to more than 1 employee, use the plural form

**If respondent talks about on-site visits by technicians, probe:* But if you consider only the part handled over the telephone to make your request, how satisfied are you with the representative you dealt with in terms of?*

**If respondent comments about satisfied with some but not others, probe:* But, overall, considering all of the representatives you dealt with to make your request, how satisfied were you with them in overall?*

Random order

a)	Being courteous and polite	(1-10) NA/DK-99
b)	Being respectful	(1-10) NA/DK-99
c)	Making you feel like a valued customer	(1-10) NA/DK-99
d)	taking the necessary time to understand your needs	(1-10) NA/DK – 99
e)	providing thorough and accurate information in response to your questions	(1-10) NA/DK – 99

12. Now, considering all the aspects we just mentioned as well as anything else you might think of, **overall** how satisfied were you with the quality of service provided by the Newfoundland Power representative(s) you dealt with on this call?

INTERVIEWER: If spoke with more than one employee, use the plural form

**If respondent starts to comment about satisfied with some but not others, probe:* *But, overall, considering all of the representatives you dealt with to make your request, how satisfied were you with them overall?*

______.................................... (1-10)
NA / DK.................................. 99 *Go to Q16*

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION 14, ELSE SKIP TO Q16

13. Can you tell me the main reason why you gave a rating of _____<**Recall from Q14**>

Automated system

14. During the last month, did you make a call to the Power Outages & Emergencies number of Newfoundland Power?

    [Interviewer, if required: the number is 737-5711 or toll free 1-800-474-5711]

    1. Yes (Continue to Question 17)
    2. No (Go to Check before Question 18)

15. Now, thinking about the time(s) that you called this telephone line, how would you rate your satisfaction in terms of:

a)	Your ability to get the information you were seeking	(1-10) NA/DK-99
b)	Timeliness of updates	(1-10) NA/DK-99
c)	Ability to easily identify which menu number to press for your inquiry	(1-10) NA/DK-99

Website Services

[Check: IF Q10b: website=yes, continue; otherwise go to Q24]

16. How often do you visit newfoundlandpower.com per month?
    1-2 times
    3-5 times
    5-10 times
    more than 10 times

17. What was the main reason for your visit(s) to newfoundlandpower.com during the last month? Were there any other reasons?

DO NOT READ LIST. RECORD Main and Other Reasons separately

	MAIN	OTHER
To get information on my bill	01	1
To change account information	02	1
To fill out forms	03	1
To get information on power outage	04	1
To review my usage history	05	1
To get phone number to call customer service	06	1
Other (specify) ____________________________		

18. Now, thinking about your visit(s) to newfoundlandpower.com during the past month, were you:

    a) able to complete everything you wanted to do online, without having to call Newfoundland Power? YES/NO/NA_DK-99

    a_1) **If Yes in 20a,** were you able to complete your request or find your information easily? YES/NO/NA_DK-99

    a_2) **If No in 20a**, what else would you like to have done or what did you have to call about? (Specify)

    b) If your inquiry required a response, did you receive one in a timely manner? YES/NO/NA_DK-99

19. Overall, on a scale from 1 to 10, where 1 is not at all satisfied and 10 is fully satisfied, how satisfied are you with newfoundlandpower.com ?

    1 2 3 4 5 6 7 8 9 10

    IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION 22, ELSE SKIP TO Q23

20. Can you tell me the main reason why you gave a rating of _____? <**Recall from Q21**>

21. What, if anything, would you like to see or be able to do on newfoundlandpower.com?

Section 4: Demographic Information

24. **OBSERVE** Gender of respondent

    1. Male
    2. Female

25. Would you mind telling me into which of the following categories your age falls?

    1. 18 to 34
    2. 35 to 49
    3. 50 to 64
    4. 65 or older
    99 Refused (VOL)

26. What is your Postal Code

    1) _________
    2) Don't Know
    3) Prefer Not to say

That is the end of my questions.
THANK YOU VERY MUCH FOR YOUR HELP TODAY.

S1: Do you, or anyone in your household currently work for NF Power?

	Total	Type
		Residential
Total Unweighted (n)	257	257
No	100%	100%

S2: According to information provided to us, you received a visit from a Newfoundland Power Field Representative on <RECALL DATE>. Is this correct?

	Total	Type	
		Business	Residential
Total Unweighted (n)	300	43	257
Yes	77%	81%	76%
Recall the actual visit but not the date	23%	19%	24%

Q1: How satisfied are you with the overall service provided by Newfoundland Power?

	Total	Type	
		Business	Residential
Total Unweighted (n)	300	43	257
1 - Not at all satisfied	4%	7%	4%
2	1%	0%	1%
3	2%	2%	2%
4	1%	0%	1%
5	4%	2%	4%
6	2%	2%	2%
7	7%	14%	6%
8	15%	14%	15%
9	14%	23%	12%
10 - Fully satisfied	51%	35%	53%
% 9 or higher	65%	58%	66%
Mean	8.5	8.1	8.5
N (valid responses)	300	43	257

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q2: Can you tell me the main reason why you gave a rating of ___?
SUBSET: If rating is 6 or less.

	Total	Type	
		Business	Residential
Total Unweighted (n)	40	6	34
Other (Please Specify)	100%	100%	100%

Q3: Did you meet with the Newfoundland Power field representative in person?

	Total	Type	
		Business	Residential
Total Unweighted (n)	300	43	257
Yes	62%	72%	61%
No	38%	28%	39%

Q4: How satisfied were you with the quality of service provided by the field representative who came to your <housebusiness> in terms of …
SUBSET: Those who met a field representative in person.

		Total	Type	
			Business	Residential
Total Unweighted (n)		187	31	156
Being courteous and polite	1 - Not at all satisfied	1%	0%	1%
	7	1%	3%	1%
	8	6%	6%	6%
	9	10%	16%	9%
	10 - Fully satisfied	81%	71%	82%
	Refused	1%	0%	1%
	Don't know	1%	3%	1%
Being respectful	1 - Not at all satisfied	1%	0%	1%
	6	1%	0%	1%
	7	1%	0%	1%
	8	5%	10%	4%
	9	11%	19%	10%
	10 - Fully satisfied	79%	71%	81%
	Refused	1%	0%	1%
	Don't know	1%	0%	1%

Making you feel like a valued customer	1 - Not at all satisfied	2%	3%	1%
	6	1%	6%	1%
	7	2%	3%	2%
	8	8%	3%	9%
	9	10%	16%	9%
	10 - Fully satisfied	74%	65%	75%
	Refused	1%	0%	1%
	Don't know	3%	3%	3%
Being knowledgeable	1 - Not at all satisfied	2%	0%	2%
	5	1%	0%	1%
	6	1%	0%	1%
	7	2%	3%	2%
	8	8%	6%	8%
	9	8%	19%	6%
	10 - Fully satisfied	76%	71%	76%
	Refused	1%	0%	1%
	Don't know	3%	0%	4%
Keeping you up to date on the status of your work order	1 - Not at all satisfied	5%	12%	5%
	2	1%	2%	0%
	3	2%	0%	3%
	4	1%	0%	2%
	5	4%	2%	4%
	6	2%	2%	2%
	7	3%	7%	3%
	8	8%	7%	9%
	9	6%	12%	6%
	10 - Fully satisfied	53%	47%	53%
	Refused	1%	0%	1%
	Don't know	12%	9%	13%
Completing the work in a timely manner	1 - Not at all satisfied	5%	5%	5%
	2	0%	0%	0%
	3	0%	0%	0%
	4	1%	2%	1%
	5	3%	5%	3%
	6	1%	0%	2%
	7	3%	2%	3%
	8	11%	14%	11%
	9	9%	12%	8%
	10 - Fully satisfied	64%	60%	64%
	Refused	1%	0%	1%
	Don't know	2%	0%	2%

Leaving your premises in good condition	1 - Not at all satisfied	1%	2%	0%
	3	0%	0%	0%
	4	1%	0%	1%
	5	0%	0%	0%
	6	1%	0%	1%
	7	1%	0%	1%
	8	8%	9%	8%
	9	9%	12%	9%
	10 - Fully satisfied	75%	77%	75%
	Refused	1%	0%	1%
	Don't know	3%	0%	3%
Being able to deal with any issue you had	1 - Not at all satisfied	3%	2%	4%
	2	0%	0%	0%
	3	3%	0%	3%
	4	0%	0%	0%
	5	1%	2%	1%
	6	2%	2%	2%
	7	3%	7%	2%
	8	10%	9%	11%
	9	10%	14%	9%
	10 - Fully satisfied	60%	58%	60%
	Refused	1%	0%	1%
	Don't know	8%	5%	8%

Q4: How satisfied were you with the quality of service provided by the field representative who came to your <housebusiness> in terms of …
% 9 or higher
SUBSET: Those who met a field representative in person.

	Total	Type	
		Business	**Residential**
Being courteous and polite	92%	90%	92%
Being respectful	92%	90%	93%
Making you feel like a valued customer	86%	83%	87%
Being knowledgeable	87%	90%	86%
Keeping you up to date on the status of your work order	68%	64%	69%
Completing the work in a timely manner	74%	72%	74%
Leaving your premises in good condition	87%	88%	87%
Being able to deal with any issue you had	76%	76%	76%

Refusals and Don't knows have been excluded.

Q4: How satisfied were you with the quality of service provided by the field representative who came to your <housebusiness> in terms of …
Mean Values
SUBSET: Those who met a field representative in person.

		Total	Type	
			Business	Residential
Being courteous and polite	N	184	30	154
	Mean	9.7	9.6	9.7
Being respectful	N	184	31	153
	Mean	9.7	9.6	9.7
Making you feel like a valued customer	N	181	30	151
	Mean	9.5	9.1	9.5
Being knowledgeable	N	179	31	148
	Mean	9.5	9.6	9.5
Keeping you up to date on the status of your work order	N	260	39	221
	Mean	8.4	7.9	8.4
Completing the work in a timely manner	N	293	43	250
	Mean	8.8	8.7	8.8
Leaving your premises in good condition	N	290	43	247
	Mean	9.5	9.5	9.5
Being able to deal with any issue you had	N	275	41	234
	Mean	8.9	9.0	8.9

Q5: Overall how satisfied were you with the quality of service provided by the Newfoundland Power field representative(s) that came to your <house/business>?

	Total	Type	
		Business	Residential
Total Unweighted (n)	300	43	257
1 - Not at all satisfied	2%	2%	2%
3	1%	0%	1%
4	1%	0%	1%
5	1%	0%	2%
6	1%	0%	1%
7	5%	2%	5%
8	11%	14%	10%
9	13%	23%	12%
10 - Fully satisfied	65%	58%	66%
Refused (VOL)	0%	0%	0%
Don't know (VOL)	0%	0%	0%
% 9 or higher	78%	81%	78%
Mean	9.1	9.2	9.1
N (valid responses)	298	43	255

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q6: Can you tell me the main reason why you gave a rating of _____?
SUBSET: If rating is 6 or less.

	Total	Type	
		Business	Residential
Total Unweighted (n)	18	1	17
Other (Please Specify)	100%	100%	100%

Q7: How satisfied would you be to have this/these field representative(s)/technician(s) visit your <home/business> again should you have another request that required a visit?

	Total	Type	
		Business	Residential
Total Unweighted (n)	300	43	257
1 - Not at all satisfied	1%	0%	2%
5	1%	0%	1%
6	0%	0%	0%
7	3%	2%	3%
8	9%	12%	9%
9	10%	12%	10%
10 - Fully satisfied	74%	72%	74%
Refused (VOL)	0%	0%	0%
Don't know (VOL)	1%	2%	1%
% 9 or higher	86%	86%	86%
Mean	9.5	9.6	9.4
N (valid responses)	295	42	253

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q8: How satisfied were you with the time you had to wait between when you called for your request and when a field representative was able to meet with you to handle your request?

	Total	Type	
		Business	Residential
Total Unweighted (n)	300	43	257
1 - Not at all satisfied	6%	7%	5%
2	1%	0%	2%
3	3%	2%	3%
4	3%	2%	4%
5	5%	5%	5%
6	3%	0%	4%
7	8%	9%	7%
8	17%	19%	17%
9	8%	12%	7%
10 - Fully satisfied	39%	33%	39%
Refused (VOL)	0%	0%	0%
Don't know (VOL)	7%	12%	7%
% 9 or higher	50%	50%	50%
Mean	7.8	7.8	7.8
N (valid responses)	277	38	239

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q8b: How satisfied were you with the service you received from Newfoundland Power?

	Total	Type	
		Business	Residential
Total Unweighted (n)	300	43	257
1 - Not at all satisfied	4%	12%	4%
2	1%	0%	1%
3	2%	0%	2%
4	1%	0%	2%
5	5%	7%	5%
6	2%	2%	2%
7	8%	7%	8%
8	15%	7%	16%
9	11%	21%	9%
10 - Fully satisfied	48%	35%	49%
Refused (VOL)	0%	0%	0%
Don't know (VOL)	3%	9%	2%
% 9 or higher	60%	62%	60%
Mean	8.3	7.7	8.3
N (valid responses)	290	39	251

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q9: Did you use any of the following methods to contact or interact with Newfoundland Power within the past month?

		Total	Type	
			Business	Residential
Total Unweighted (n)		300	43	257
E-mail	Yes	11%	19%	11%
	No	88%	81%	89%
	Don't know	1%	0%	1%
Visit(s) to the newfoundlandpower.com website	Yes	18%	21%	18%
	No	82%	79%	82%
Social Media	Yes	2%	0%	3%
	No	97%	98%	97%
	Don't know	1%	2%	0%

In-person	Yes	15%	21%	14%
	No	85%	79%	86%
	Don't know	0%	0%	0%
Telephone	Yes	53%	63%	51%
	No	46%	37%	47%
	Don't know	1%	0%	1%

Q9_1: Did you contact Newfoundland Power by telephone within the past 3 months?
SUBSET: Those who didn't contact NL Power within the past month by telephone.

	Total	Type	
		Business	Residential
Total Unweighted (n)	141	16	125
Yes	55%	50%	55%
No	41%	44%	41%
Don't know	4%	6%	4%

Q10: How satisfied were you with following method(s) of contact?
SUBSET: Those who use these methods.

		Total	Type	
			Business	Residential
Total (n)		35	8	27
E-mail	4	3%	0%	4%
	5	2%	13%	0%
	8	17%	13%	19%
	9	16%	38%	11%
	10 - Fully satisfied	61%	38%	67%
Total (n)		7	0	7
Social Media	4	14%	0%	14%
	7	14%	0%	14%
	8	14%	0%	14%
	9	29%	0%	29%
	10 - Fully satisfied	29%	0%	29%

Total (n)		45	9	36
In-person	1 - Not at all satisfied	2%	11%	0%
	3	2%	0%	3%
	6	2%	0%	3%
	7	2%	0%	3%
	8	18%	11%	19%
	9	5%	33%	0%
	10 - Fully satisfied	68%	44%	72%

Q10: How satisfied were you with following method(s) of contact?
SUBSET: Those who use these methods.
% 9 or higher

	Total	Type	
		Business	Residential
E-mail	77%	75%	78%
Social Media	57%	0%	57%
In-person	73%	78%	72%

Refusals and Don't knows have been excluded.

Q10: How satisfied were you with following method(s) of contact?
SUBSET: Those who use these methods.
Mean Values

		Total	Type	
			Business	Residential
E-mail	N	35	8	27
	Mean	9.2	8.8	9.3
Social Media	N	7	0	7
	Mean	8.1		8.1
In-person	N	45	9	36
	Mean	9.1	8.4	9.2

Q11: How would you rate your satisfaction towards the employee(s) who handled your call in terms of:
SUBSET: Those who contacted by phone.

		Total	Type	
			Business	Residential
Total Unweighted (n)		236	35	201
Being courteous and polite	1 - Not at all satisfied	0%	0%	0%
	2	1%	0%	1%
	3	1%	0%	1%
	4	0%	0%	0%
	5	1%	3%	0%
	6	1%	0%	1%
	7	3%	3%	3%
	8	10%	3%	10%
	9	11%	11%	11%
	10 - Fully satisfied	69%	80%	67%
	Refused	0%	0%	0%
	Don't know	3%	0%	3%
Being respectful	2	0%	0%	0%
	3	0%	0%	0%
	5	1%	3%	0%
	6	1%	0%	1%
	7	6%	6%	5%
	8	9%	3%	10%
	9	11%	11%	11%
	10 - Fully satisfied	68%	77%	67%
	Refused	0%	0%	0%
	Don't know	3%	0%	3%
Making you feel like a valued customer	1 - Not at all satisfied	1%	3%	1%
	2	1%	3%	1%
	4	2%	0%	2%
	5	2%	3%	2%
	6	2%	6%	1%
	7	4%	3%	4%
	8	11%	9%	11%
	9	13%	14%	12%
	10 - Fully satisfied	61%	60%	61%
	Refused	0%	0%	0%
	Don't know	4%	0%	4%

taking the necessary time to understand your needs	1 - Not at all satisfied	1%	0%	1%
	2	2%	0%	2%
	4	0%	0%	0%
	5	2%	6%	2%
	6	0%	0%	0%
	7	5%	3%	5%
	8	9%	11%	8%
	9	15%	11%	15%
	10 - Fully satisfied	62%	69%	61%
	Refused	0%	0%	0%
	Don't know	3%	0%	3%
providing thorough and accurate information in response to your questions	1 - Not at all satisfied	0%	0%	0%
	2	2%	3%	1%
	3	2%	0%	2%
	4	2%	0%	2%
	5	2%	6%	1%
	6	3%	3%	3%
	7	3%	6%	3%
	8	13%	14%	13%
	9	10%	11%	9%
	10 - Fully satisfied	60%	57%	60%
	Refused	0%	0%	0%
	Don't know	3%	0%	3%

**Q11: How would you rate your satisfaction towards the employee(s) who handled your call in terms of:
% 9 or higher
SUBSET: Those who contacted by phone.**

	Total	Type	
		Business	Residential
Being courteous and polite	82%	91%	81%
Being respectful	82%	89%	81%
Making you feel like a valued customer	76%	74%	77%
taking the necessary time to understand your needs	79%	80%	79%
providing thorough and accurate information in response to your questions	72%	69%	73%

Refusals and Don't knows have been excluded.

Q11: How would you rate your satisfaction towards the employee(s) who handled your call in terms of: Mean Values SUBSET: Those who contacted by phone.

		Total	Type	
			Business	Residential
Being courteous and polite	N	229	35	194
	Mean	9.3	9.6	9.3
Being respectful	N	229	35	194
	Mean	9.4	9.5	9.3
Making you feel like a valued customer	N	227	35	192
	Mean	9.0	8.7	9.1
taking the necessary time to understand your needs	N	229	35	194
	Mean	9.1	9.3	9.0
providing thorough and accurate information in response to your questions	N	228	35	193
	Mean	8.9	8.8	8.9

Q12: Overall how satisfied were you with the quality of service provided by the Newfoundland Power representative(s) you dealt with on this call? SUBSET: Those who contacted by phone.

	Total	Type	
		Business	Residential
Total Unweighted (n)	236	35	201
1 - Not at all satisfied	0%	3%	0%
2	0%	0%	0%
3	1%	0%	1%
4	1%	3%	1%
5	3%	3%	3%
6	1%	3%	1%
7	5%	0%	5%
8	12%	11%	12%
9	14%	20%	13%
10 - Fully satisfied	60%	57%	60%
Don't know (VOL)	2%	0%	2%
% 9 or higher	75%	77%	75%
Mean	9.0	8.9	9.1
N (valid responses)	231	35	196

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q13: Can you tell me the main reason why you gave a rating of ___.
SUBSET: If rating is 6 or less.

	Total	Type	
		Business	Residential
Total Unweighted (n)	18	4	14
Other (Please Specify)	94%	100%	93%
Refused (VOL)	6%	0%	7%

Q14: During the last month, did you make a call to the Power Outages & Emergencies number of Newfoundland Power?
SUBSET: Those who contacted by phone.

	Total	Type	
		Business	Residential
Total Unweighted (n)	236	35	201
Yes	18%	23%	17%
No	81%	77%	82%
Don't know (VOL)	1%	0%	1%

Q15: Now, thinking about the time(s) that you called this telephone line, how would you rate your satisfaction in terms of:
SUBSET: Those who contacted by phone.

		Total	Type	
			Business	Residential
Total Unweighted (n)		43	8	35
Your ability to get the information you were seeking	1 - Not at all satisfied	5%	0%	6%
	2	2%	0%	3%
	3	5%	0%	6%
	5	7%	0%	9%
	6	2%	0%	3%
	7	9%	13%	9%
	8	4%	25%	0%
	9	14%	13%	14%
	10 - Fully satisfied	49%	50%	49%
	Refused	2%	0%	3%

Timeliness of updates	1 - Not at all satisfied	2%	0%	3%
	2	2%	0%	3%
	3	2%	0%	3%
	4	2%	0%	3%
	5	5%	0%	6%
	7	11%	25%	9%
	8	6%	25%	3%
	9	16%	25%	14%
	10 - Fully satisfied	43%	25%	46%
	Refused	2%	0%	3%
	Don't know	7%	0%	9%
Ability to easily identify which menu number to press for your inquiry	1 - Not at all satisfied	2%	0%	3%
	2	2%	0%	3%
	5	2%	0%	3%
	6	7%	13%	6%
	7	5%	0%	6%
	8	11%	25%	9%
	9	14%	13%	14%
	10 - Fully satisfied	51%	50%	51%
	Don't know	5%	0%	6%

Q15: Now, thinking about the time(s) that you called this telephone line, how would you rate your satisfaction in terms of:
% 9 or higher
SUBSET: Those who contacted by phone.

	Total	Type	
		Business	**Residential**
Your ability to get the information you were seeking	64%	63%	65%
Timeliness of updates	65%	50%	68%
Ability to easily identify which menu number to press for your inquiry	69%	63%	70%

Refusals and Don't knows have been excluded.

**Q15: Now, thinking about the time(s) that you called this telephone line, how would you rate your satisfaction in terms of:
Mean Values
SUBSET: Those who contacted by phone.**

		Total	Type	
			Business	Residential
Your ability to get the information you were seeking	N	42	8	34
	Mean	8.0	9.0	7.9
Timeliness of updates	N	39	8	31
	Mean	8.2	8.5	8.2
Ability to easily identify which menu number to press for your inquiry	N	41	8	33
	Mean	8.6	8.9	8.6

**Q16: How often do you visit newfoundlandpower.com per month?
SUBSET: Those who visit newfoundlandpower.com.**

	Total	Type	
		Business	Residential
Total Unweighted (n)	55	9	46
Less than once per month	40%	33%	41%
1-2 times	47%	44%	48%
3-5 times	4%	0%	4%
6-10 times	7%	11%	7%
More than 10 times	1%	11%	0%

**Q17a: What was the main reason for your visit(s) to newfoundlandpower.com during the last month?
SUBSET: Those who visit newfoundlandpower.com.**

	Total	Type	
		Business	Residential
Total Unweighted (n)	55	9	46
To get information on my bill	30%	11%	33%
To change account information	2%	0%	2%
To fill out forms	1%	11%	0%
To get information on power outage	36%	44%	35%
To review my usage history	2%	0%	2%
To get phone number to call customer service	7%	11%	7%
Other (Please Specify)	18%	22%	17%
Don't know (VOL)	4%	0%	4%

Q17b: Were any other reasons?
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Business	Residential
Total Unweighted (n)	53	9	44
No other reason (VOL)	70%	67%	70%
To get information on my bill	9%	11%	9%
Other (Please Specify)	9%	11%	9%
To get information on power outage	4%	0%	5%
To get phone number to call customer service	3%	11%	2%
To fill out forms	3%	22%	0%
To change account information	2%	0%	2%
Don't know (VOL)	2%	0%	2%

Q17a/Q17b combined:
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Business	Residential
Total Unweighted (n)	55	9	46
To get information on power outage	40%	44%	39%
To get information on my bill	39%	22%	41%
Other (Please Specify)	27%	33%	26%
To get phone number to call customer service	10%	22%	9%
To fill out forms	4%	33%	0%
To change account information	4%	0%	4%
Don't know (VOL)	4%	0%	4%
To review my usage history	2%	0%	2%

Q18a: Thinking about your visit(s) to newfoundlandpower.com during the past month, were you able to complete everything you wanted to do online, without having to call NL Power?
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Business	Residential
Total Unweighted (n)	55	9	46
Yes	85%	89%	85%
No	15%	11%	15%

Q18a1: Were you able to complete your request or find your information easily?
SUBSET: Those who completed everything online.

	Total	Type	
		Business	Residential
Total Unweighted (n)	47	8	39
Yes	96%	100%	95%
No	4%	0%	5%

Q18a2: What else would you like to have done or what did you have to call about?
SUBSET: Those who were not able to complete everything online.

	Total	Type	
		Business	Residential
Total Unweighted (n)	8	1	7
Other (Please Specify)	74%	100%	71%
Don't know (VOL)	26%	0%	29%

Q18b: If your inquiry required a response, did you receive one in a timely manner?
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Business	Residential
Total Unweighted (n)	55	9	46
Yes	55%	78%	52%
No	3%	11%	2%
Refused (VOL)	4%	0%	4%
Don't know (VOL)	37%	11%	41%

Q19: Overall, on a scale from 1 to 10, where 1 is not at all satisfied and 10 is fully satisfied, how satisfied are you with newfoundlandpower.com?
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Business	Residential
Total Unweighted (n)	55	9	46
5	2%	0%	2%
6	4%	0%	4%
7	4%	0%	4%
8	17%	0%	20%
9	19%	44%	15%
10 - Fully satisfied	55%	56%	54%
% 9 or higher	73%	100%	70%
Mean	9.1	9.6	9.0
N (valid responses)	55	9	46

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q20: Can you tell me the main reason why you gave a rating of _____?
SUBSET: If rating is 6 or less.

	Total	Type
		Residential
Total Unweighted (n)	3	3
Other (Please Specify)	33%	33%
Refused (VOL)	33%	33%
Don't know (VOL)	33%	33%

Q21: What, if anything, would you like to see or be able to do on newfoundlandpower.com?
SUBSET: Those who visit newfoundlandpower.com.

	Total	Type	
		Business	Residential
Total Unweighted (n)	55	9	46
Don't know (VOL)	53%	56%	52%
Other (Please Specify)	36%	33%	37%
Refused (VOL)	11%	11%	11%

D2: Would you mind telling me into which of the following categories your age falls?

	Total	Type	
		Business	Residential
Total Unweighted (n)	300	43	257
18 to 34	16%	9%	17%
35 to 49	31%	56%	28%
50 to 64	36%	26%	38%
65 or older	16%	9%	17%
Refused (VOL)	0%	0%	0%

Gender:

	Total	Type	
		Business	Residential
Total Unweighted (n)	300	43	257
Male	60%	63%	59%
Female	40%	37%	41%

Newfoundland Power
Customer Satisfaction Survey
- Transactional Surveys –
Online (MyAccount and Webforms) Transactions
Last Updated September 18, 2013

Email Script

Dear Customer,

As part of our ongoing commitment to customer service, Newfoundland Power has asked MQO Research to survey our customers who have completed an online transaction through the Newfoundland Power website over the past 3 months. Through this survey we will identify areas where Newfoundland Power has been serving you well, as well as areas where improvements are needed in order to provide you with service excellence. You have been randomly selected to participate. While the results of this survey will remain anonymous, they will be very important to ensuring continued improvements to Newfoundland Power's customer service. We thank you in advance for taking the time to share your opinions with us.

Yours truly,

Sherina Wall

Director, Customer Relations

Newfoundland Power

Introduction
You are being contacted today as part of Newfoundland Power's customer experience program. You or someone from this email address made

ONLINE:MYACCOUNT LOGIN
…. a recent visit to Newfoundland Power's website newfoundlandpower.com in the past month or so.

Put at Bottom of Email Script
If you would like to confirm the validity of the survey with Newfoundland Power, you can call **709-737-2802 locally or 1-800-663-2802 toll-free** and speak to an employee of Newfoundland Power. **[NOTE: The Newfoundland Power Contact Centre is open during regular business hours Monday to Friday 8:00am to 5:00pm]**

RESIDENTIAL INTRO: This survey is intended for the person in the household who visited Newfoundland Power's website, newfoundlandpower.com in the past month or so. If this is someone other than you, please have the other person complete the survey. Depending on your responses the survey will take about 5-7 minutes to complete.

BUSINESS INTRO: This survey is intended for the person in this business or organization who visited Newfoundland Power's website, newfoundlandpower.com in the past month or so. If this is someone other than you, please have the other person complete the survey. If more than one individual visited the website with the past month or so, please have at least one of these individuals complete the survey. Depending on your responses the survey will take about 5-7 minutes to complete.

VALIDITY RESPONSE:
For additional information on MQO Research, please press here…otherwise continue with the survey:

MQO Research has been conducting research studies in Canada and abroad for 30 years. We are a Member of the Canadian Marketing Research AND Intelligence Association (MRIA) which is responsible for regulating marketing research practices in Canada. MQO Research adheres very strictly to all guidelines of professionalism and privacy as outlined by the MRIA. This study is registered with the Association. If you would like to contact the MRIA to verify the legitimacy of this research study or our company please call 1-800-554-9996 toll free and reference survey Number: 0584.

CONFIDENTIALITY RESPONSE:
For information on the confidentiality of the information being provided, please press here…otherwise continue with the survey.

As a Corporate Gold Seal member of the Marketing Research Intelligence Association (MRIA) we adhere to strict standards of privacy and confidentiality. Our data is always grouped. Information will never be released to our client or any other third party in a manner that could be used to disclose your identity.

Screening and Confirmation Questions:

S1. Do you, or anyone in your household currently work for NF Power?

Yes	1	**Thank and Terminate**
No	2	**Continue**

Online Visit (My Account/Web forms)

S2. According to information provided, you made at least one visit to the website, newfoundlandpower.com on <RECALL DATE> . Is this correct?

Yes	1	**Continue**
No	2	**Thank**
Yes, but can't remember the exact date	3	**Continue**

Section 1: General Service

1. First, we would like to get your opinion of the overall service provided by Newfoundland Power. On a 10 point scale where 1 is "Not at all satisfied" and 10 is "Fully satisfied", how satisfied are you with the overall service provided by Newfoundland Power?

   1 2 3 4 5 6 7 8 9 10

   IF RESPONSE IS 6 OR LESS GO TO QUESTION 2, ELSE GO TO QUESTION 3.

2. What is the main reason why you gave a rating of _____**<Recall from Q1>?**

Section 2: Website Services

3. How often do you visit newfoundlandpower.com per month?

   Less than once per month
   1-2 times
   3-5 times
   6-10 times
   more than 10 times
   Don't Know

4. What was the main reason for your visit(s) to newfoundlandpower.com during the last month? Were there any other reasons?

   DO NOT READ LIST. RECORD Main and Other Reasons separately

	MAIN	**OTHER**
To get information on my bill	01	1
To change account information	02	1
To fill out forms	03	1
To get information on power outage	04	1
To review my usage history	05	1
To get phone number to call customer service	06	1
Other (specify) ____________________________		

5. Now, thinking about your visit(s) to newfoundlandpower.com during the past month, were you:

   a) able to complete everything you wanted to do online, without having to call Newfoundland Power? YES/NO/NA_DK-99

   a_1) **If Yes in 17a,** were you able to complete your request or find your information easily? YES/NO/NA_DK-99

   a_2) **If No in 17a**, what else would you like to have done or what did you have to call about? (Specify)

   b) If your inquiry required a response, did you receive one in a timely manner? YES/NO/NA_DK-99

6. Overall, on a scale from 1 to 10, where 1 is not at all satisfied and 10 is fully satisfied, how satisfied are you with newfoundlandpower.com ?

1 2 3 4 5 6 7 8 9 10

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION 7, ELSE SKIP TO Q8

7. What is the main reason why you gave a rating of _____? <**Recall from Q7**>

8. What, if anything, would you like to see or be able to do on newfoundlandpower.com?

Section 4: Other Forms of Customer Service

Other Methods of Contact

9. Did you use any of the following methods to contact or interact with Newfoundland Power within the past month?

Read List	**Yes**	**No**	**DK**
a) E-mail	1	2	9
b) Visit(s) to the newfoundlandpower.com website	1	2	9
c) Social Media such as Twitter	1	2	9
d) In-person	1	2	9
e) Telephone	1	2	9

10. **For each YES mention in Q9a, c or d above:** How satisfied were you with the following method(s) of contact?

Not at All Satisfied									Fully Satisfied	
1	2	3	4	5	6	7	8	9	10	Don't Know

Telephone Contact

[Check: IF Q9e: telephone=yes, continue; otherwise go to Q14]:

You mentioned you contacted Newfoundland Power by telephone within the past month.

11. Now, thinking about the Newfoundland Power representative(s) you spoke with on the phone, how would you rate your satisfaction towards the employee(s) who handled your call in terms of:

Note: If you spoke to more than 1 employee, using multiple methods of contact, for this series of questions, consider only the part handled <u>over the telephone</u> to make your request. If you spoke with more than 1 employee, consider all of the representatives you dealt with by telephone to make your request.

How satisfied are you with the representative you dealt with in terms of…..

Random order

a) Being courteous and polite (1-10) NA/DK-99
b) Being respectful (1-10) NA/DK-99
c) Making you feel like a valued customer (1-10) NA/DK-99
d) taking the necessary time to understand your needs (1-10) NA/DK – 99
e) providing thorough and accurate information in response to your questions (1-10) NA/DK – 99

12. Now, considering all the aspects just mentioned as well as anything else you might think of, **overall** how satisfied were you with the quality of service provided by the Newfoundland Power representative(s) you dealt with on this call?

    Note: If you spoke with more than one employee, consider all of the representatives you dealt with, how satisfied were you with them overall?

    _______.................................... (1-10)
    NA / DK.................................. 99 *Go to Q14*

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION 13, ELSE SKIP TO Q14

13. Can you tell me the main reason why you gave a rating of _____<**Recall from Q12**>

Automated system

14. During the last month, did you make a call to the Power Outages & Emergencies number of Newfoundland Power?

    [Interviewer, if required: the number is 737-5711 or toll free 1-800-474-5711]

    1. Yes (Continue to Question 15)
    2. No (Go to Demographics Q16)

15. Now, thinking about the time(s) that you called this telephone line in the last month, how would you rate your satisfaction in terms of:

a)	Your ability to get the information you were seeking	(1-10) NA/DK-99
b)	Timeliness of updates	(1-10) NA/DK-99

Section 5: Demographics

Now, just a few final questions about yourself to help us group responses.

16. Are you…

    1. Male
    2. Female

17. Into which of the following categories does your age fall?

1. 18 to 34
2. 35 to 49
3. 50 to 64
4. 65 or older

99 Refused (VOL)

18. What is your Postal Code?

1) __________
2) Don't Know
3) Prefer Not to say

That is the end of the questions.

THANK YOU VERY MUCH FOR YOUR HELP TODAY.

S1: Do you, or anyone in your household currently work for NF Power?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	741	40	701
No	100%	100%	100%

S2: According to information provided, you made at least one visit to the website, newfoundlandpower.com on <RECALL DATE> . Is this correct?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	741	40	701
Yes	54%	70%	53%
Yes, but can't remember the exact date	46%	30%	47%

Q1: How satisfied are you with the overall service provided by Newfoundland Power?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	741	40	701
1 - Not at all satisfied	1%	3%	1%
2	1%	0%	1%
3	1%	0%	1%
4	1%	0%	1%
5	5%	0%	6%
6	3%	0%	3%
7	13%	15%	13%
8	20%	18%	20%
9	12%	18%	11%
10 - Fully satisfied	41%	48%	40%
Prefer not to say	1%	0%	1%
Don't know	1%	0%	1%
% 9 or higher	53%	65%	53%
Mean	8.3	8.8	8.3
N (valid responses)	726	40	686

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

**Q2: Can you tell me the main reason why you gave a rating of ___?
SUBSET: If rating is 6 or less.**

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	96	1	95
Please Enter Response in Box Below:	69%	100%	68%
Prefer not to say	30%	0%	31%
Don't know	1%	0%	1%

Q3: How often do you visit newfoundlandpower.com per month?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	741	40	701
Less than once per month	26%	40%	26%
1-2 times	62%	48%	63%
3-5 times	8%	3%	8%
6-10 times	1%	3%	1%
More than 10 times	1%	0%	1%
Prefer not to say	0%	0%	0%
Don't know	2%	8%	2%

Q4a: What was the main reason for your visit(s) to newfoundlandpower.com during the last month?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	741	40	701
To get information on my bill	73%	78%	73%
To change account information	3%	8%	3%
To fill out forms	1%	3%	1%
To get information on power outage	7%	0%	7%
To review my usage history	12%	5%	12%
To get phone number to call customer service	0%	3%	0%
Other (Please Specify)	2%	3%	2%
Prefer not to say	0%	0%	0%
Don't know	2%	3%	2%

Q4b: Were there any other reasons?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	723	39	684
To review my usage history	39%	38%	39%
To get information on power outage	20%	13%	20%
To get information on my bill	16%	8%	16%
Don't know	16%	15%	16%
Other (Please Specify)	12%	15%	12%
To change account information	6%	13%	5%
To get phone number to call customer service	3%	0%	3%
Prefer not to say	1%	0%	1%
To fill out forms	1%	0%	1%

Q4a/Q4b combined:

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	741	40	701
To get information on my bill	89%	85%	89%
To review my usage history	50%	43%	50%
To get information on power outage	27%	13%	27%
Other (Please Specify)	13%	18%	13%
To change account information	8%	20%	8%
To get phone number to call customer service	3%	3%	3%
Don't know	2%	3%	2%
To fill out forms	2%	3%	2%
Prefer not to say	0%	0%	0%

Q5a: Thinking about your visit(s) to newfoundlandpower.com during the past month, were you able to complete everything you wanted to do online, without having to call NL Power?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	741	40	701
Yes	91%	85%	91%
No	8%	15%	8%
Don't know	1%	0%	1%

Q5a1: Were you able to complete your request or find your information easily?
SUBSET: Those who completed everything online.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	674	34	640
Yes	96%	94%	96%
No	4%	6%	4%
Prefer not to say	0%	0%	0%
Don't know	0%	0%	0%

Q5a2: What else would you like to have done or what did you have to call about?
SUBSET: Those who didn't complete everything online.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	67	6	61
Please Enter Response in Box Below:	78%	100%	77%
Don't know	14%	0%	15%
Prefer not to say	8%	0%	8%

Q5b: If your inquiry required a response, did you receive one in a timely manner?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	741	40	701
Yes	20%	30%	20%
No	2%	0%	2%
Response was not required	75%	68%	75%
Prefer not to say	1%	0%	1%
Don't know	2%	3%	2%

Q6: Overall, on a scale from 1 to 10, where 1 is not at all satisfied and 10 is fully satisfied, how satisfied are you with newfoundlandpower.com?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	741	40	701
1 - Not at all satisfied	0%	0%	0%
2	1%	0%	1%
3	0%	0%	0%
4	1%	0%	1%
5	5%	3%	5%
6	4%	5%	4%
7	10%	15%	10%
8	20%	20%	20%
9	14%	15%	14%
10 - Fully satisfied	44%	43%	45%
Prefer not to say	0%	0%	0%
Don't know	0%	0%	0%
% 9 or higher	58%	58%	58%
Mean	8.6	8.7	8.6
N (valid responses)	738	40	698

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q7: What is the main reason why you gave a rating of ___? SUBSET: If rating is 6 or less

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	85	3	82
Please Enter Response in Box Below:	51%	33%	51%
Prefer not to say	46%	33%	46%
Don't know	3%	33%	2%

Q8: What, if anything, would you like to see or be able to do on newfoundlandpower.com?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	741	40	701
Don't know	58%	48%	58%
Please Enter Response in Box Below:	34%	45%	34%
Prefer not to say	8%	8%	8%

Q9: Did you use any of the following methods to contact or interact with Newfoundland Power within the past month?

		Total	Type	
			Commercial	Residential
Total Unweighted (n)		741	40	701
E-mail	Yes	19%	30%	18%
	No	80%	70%	80%
	Prefer not to say	0%	0%	0%
	Don't know	2%	0%	2%
Social Media	Yes	10%	3%	10%
	No	88%	98%	88%
	Prefer not to say	0%	0%	0%
	Don't know	1%	0%	1%
In-person	Yes	3%	3%	3%
	No	96%	98%	96%
	Prefer not to say	0%	0%	0%
	Don't know	1%	0%	1%
Telephone	Yes	18%	25%	17%
	No	81%	75%	81%
	Prefer not to say	1%	0%	1%
	Don't know	1%	0%	1%

Q10: How satisfied were you with the following method(s) of contact? SUBSET: Those who used these methods to contact NL Power.

		Total	Type	
			Commercial	Residential
Total (n)		140	12	128
E-mail	1 - Not at all satisfied	2%	0%	2%
	2	2%	0%	2%
	3	1%	0%	1%
	5	5%	0%	5%
	6	4%	0%	4%
	7	5%	0%	5%
	8	16%	25%	16%
	9	12%	25%	12%
	10 - Fully satisfied	52%	50%	52%
	Prefer not to say	1%	0%	1%
	Don't know	2%	0%	2%

Total (n)		74	1	73
Social Media	1 - Not at all satisfied	3%	0%	3%
	3	1%	0%	1%
	4	3%	0%	3%
	5	11%	0%	11%
	6	4%	0%	4%
	7	14%	0%	14%
	8	18%	100%	18%
	9	12%	0%	12%
	10 - Fully satisfied	31%	0%	32%
	Prefer not to say	1%	0%	1%
	Don't know	1%	0%	1%
Total (n)		23	1	22
In-person	4	4%	0%	5%
	6	9%	0%	9%
	7	4%	0%	5%
	8	15%	100%	14%
	9	18%	0%	18%
	10 - Fully satisfied	49%	0%	50%

Q10: How satisfied were you with the following method(s) of contact?
SUBSET: Those who used these methods to contact NL Power.
% 9 or higher

	Total	Type	
		Commercial	**Residential**
E-mail	66%	75%	66%
Social Media	45%	0%	45%
In-person	67%	0%	68%

Refusals and Don't knows have been excluded.

Q10: How satisfied were you with the following method(s) of contact?
SUBSET: Those who used these methods to contact NL Power.
Mean Values

		Total	Type	
			Commercial	Residential
E-mail	N	137	12	125
	Mean	8.7	9.3	8.6
Social Media	N	72	1	71
	Mean	7.8	8.0	7.8
In-person	N	23	1	22
	Mean	8.8	8.0	8.8

Q11: How satisfied are you with the representative you dealt with in terms of…..
SUBSET: Those who contacted by phone.

		Total	Type	
			Commercial	Residential
Total Unweighted (n)		132	10	122
Being courteous and polite	2	2%	0%	2%
	3	2%	0%	2%
	4	1%	0%	1%
	5	3%	10%	2%
	6	2%	0%	2%
	7	5%	0%	5%
	8	6%	0%	6%
	9	16%	10%	16%
	10 - Fully satisfied	56%	70%	56%
	Prefer not to say	4%	0%	4%
	Don't know	5%	10%	5%
Being respectful	2	1%	0%	1%
	3	2%	0%	2%
	4	2%	0%	2%
	5	3%	0%	3%
	7	5%	0%	5%
	8	8%	0%	8%
	9	14%	20%	14%
	10 - Fully satisfied	58%	70%	57%
	Prefer not to say	3%	0%	3%
	Don't know	5%	10%	5%

Making you feel like a valued customer	1 - Not at all satisfied	2%	10%	2%
	2	2%	0%	2%
	3	2%	0%	2%
	5	2%	0%	2%
	6	4%	0%	4%
	7	4%	0%	4%
	8	10%	0%	10%
	9	15%	20%	15%
	10 - Fully satisfied	48%	60%	48%
	Prefer not to say	5%	0%	5%
	Don't know	7%	10%	7%
taking the necessary time to understand your needs	1 - Not at all satisfied	1%	0%	1%
	2	2%	0%	2%
	3	2%	0%	2%
	4	2%	0%	2%
	5	1%	10%	1%
	6	2%	0%	2%
	7	6%	10%	6%
	8	7%	0%	7%
	9	14%	10%	14%
	10 - Fully satisfied	55%	60%	55%
	Prefer not to say	4%	0%	4%
	Don't know	5%	10%	5%
providing thorough and accurate information in response to your questions	1 - Not at all satisfied	2%	10%	2%
	2	1%	0%	1%
	3	2%	0%	2%
	5	3%	0%	3%
	6	1%	0%	1%
	7	7%	0%	7%
	8	6%	0%	7%
	9	14%	30%	14%
	10 - Fully satisfied	55%	50%	55%
	Prefer not to say	4%	0%	4%
	Don't know	4%	10%	4%

Q11: How satisfied are you with the representative you dealt with in terms of…..
SUBSET: Those who contacted by phone.
% 9 or higher

	Total	Type	
		Commercial	Residential
Being courteous and polite	80%	89%	79%
Being respectful	78%	100%	78%
Making you feel like a valued customer	72%	89%	71%
taking the necessary time to understand your needs	76%	78%	76%
providing thorough and accurate information in response to your questions	75%	89%	75%

Refusals and Don't knows have been excluded.

Q11: How satisfied are you with the representative you dealt with in terms of…..
SUBSET: Those who contacted by phone.
Mean Values

		Total	Type	
			Commercial	Residential
Being courteous and polite	N	120	9	111
	Mean	9.0	9.3	9.0
Being respectful	N	121	9	112
	Mean	9.0	9.8	9.0
Making you feel like a valued customer	N	116	9	107
	Mean	8.7	8.8	8.7
taking the necessary time to understand your needs	N	120	9	111
	Mean	8.9	9.0	8.8
providing thorough and accurate information in response to your questions	N	121	9	112
	Mean	8.8	8.7	8.8

Q12: Overall how satisfied were you with the quality of service provided by the Newfoundland Power representative(s) you dealt with on this call?
SUBSET: Those who contacted by phone.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	132	10	122
1 - Not at all satisfied	3%	10%	2%
3	1%	0%	1%
4	4%	0%	4%
5	2%	0%	2%
6	2%	0%	2%
7	5%	10%	5%
8	14%	0%	15%
9	15%	20%	15%
10 - Fully satisfied	50%	60%	49%
Don't know (VOL)	4%	0%	4%
% 9 or higher	67%	80%	67%
Mean	8.6	8.6	8.6
N (valid responses)	127	10	117

Refusals and Don't knows have been excluded from '% 9 or higher' calculation.

Q13: Can you tell me the main reason why you gave a rating of ___.
SUBSET: Those who contacted by phone.

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	16	1	15
Please Enter Response in Box Below:	54%	100%	53%
Prefer not to say	33%	0%	33%
Don't know	13%	0%	13%

Q14: During the last month, did you make a call to the Power Outages & Emergencies number of Newfoundland Power?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	741	40	701
Yes	16%	20%	16%
No	82%	80%	82%
Prefer not to say	0%	0%	0%
Don't know	1%	0%	1%

Q15: Now, thinking about the time(s) that you called this telephone line in the last month, how would you rate your satisfaction in terms of:
SUBSET: Those who called to the Power Outages & Emergencies number of NL Power.

		Total	Type	
			Commercial	Residential
Total Unweighted (n)		120	8	112
Your ability to get the information you were seeking	1 - Not at all satisfied	10%	0%	11%
	2	1%	13%	1%
	3	2%	0%	2%
	4	3%	0%	4%
	5	7%	13%	7%
	6	4%	0%	4%
	7	14%	0%	14%
	8	13%	13%	13%
	9	13%	13%	13%
	10 - Fully satisfied	29%	50%	29%
	Don't know	2%	0%	2%
Timeliness of updates	1 - Not at all satisfied	11%	0%	12%
	2	1%	0%	1%
	3	4%	13%	4%
	4	2%	0%	2%
	5	11%	13%	11%
	6	3%	0%	4%
	7	15%	13%	15%
	8	12%	13%	12%
	9	11%	13%	11%
	10 - Fully satisfied	28%	25%	28%
	Don't know	3%	13%	3%

Q15: Now, thinking about the time(s) that you called this telephone line in the last month, how would you rate your satisfaction in terms of:
SUBSET: Those who called to the Power Outages & Emergencies number of NL Power.
% 9 or higher

	Total	Type	
		Commercial	Residential
Your ability to get the information you were seeking	43%	63%	43%
Timeliness of updates	40%	43%	39%

Refusals and Don't knows have been excluded.

Q15: Now, thinking about the time(s) that you called this telephone line in the last month, how would you rate your satisfaction in terms of:
SUBSET: Those who called to the Power Outages & Emergencies number of NL Power.
Mean Values

		Total	Type	
			Commercial	Residential
Your ability to get the information you were seeking	N	118	8	110
	Mean	7.2	8.0	7.2
Timeliness of updates	N	116	7	109
	Mean	7.0	7.4	7.0

D1: Gender:

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	741	40	701
Male	44%	38%	44%
Female	56%	63%	56%

D2: Would you mind telling me into which of the following categories your age falls?

	Total	Type	
		Commercial	Residential
Total Unweighted (n)	741	40	701
18 to 34	26%	13%	26%
35 to 49	30%	43%	30%
50 to 64	30%	35%	30%
65 or older	13%	10%	13%
Prefer not to say	1%	0%	1%

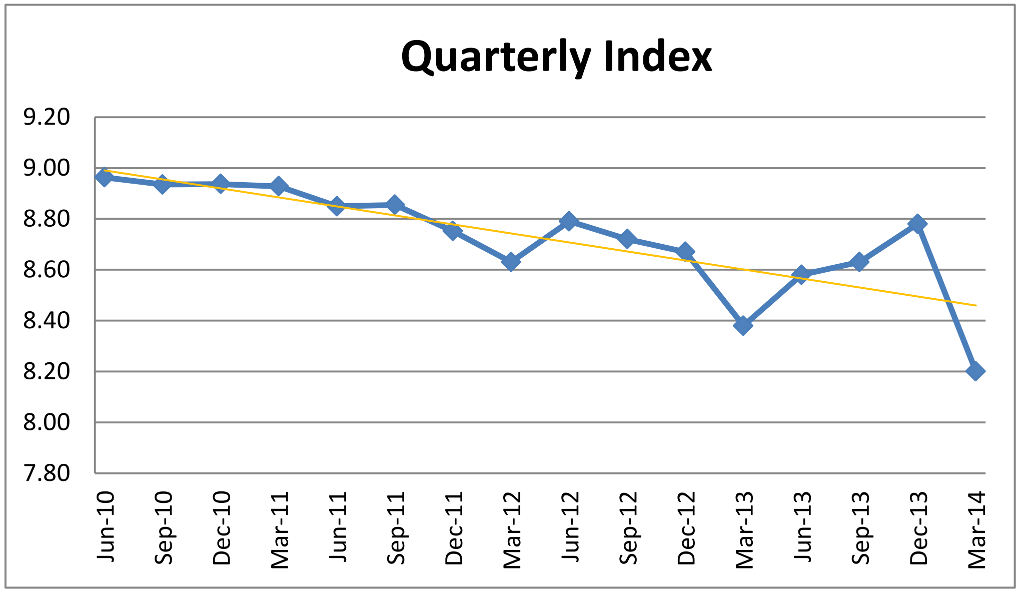
Q1 2013 Customer Satisfaction Survey
(Transactional)

NEWFOUNDLAND POWER
A FORTIS COMPANY

Customer Satisfaction Report

March 31, 2014

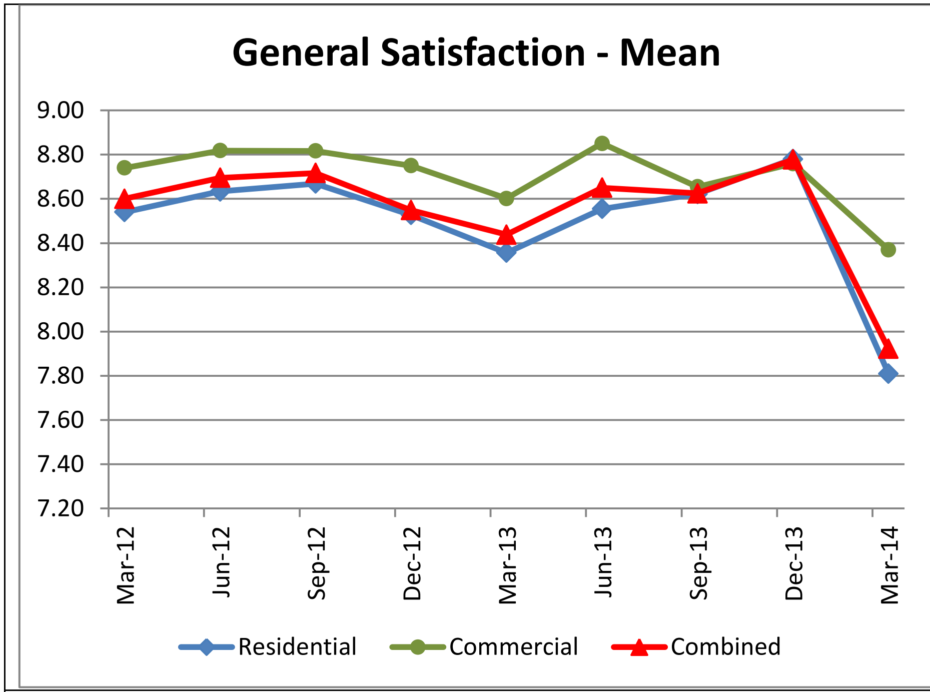
Customer Satisfaction Report
March 2014



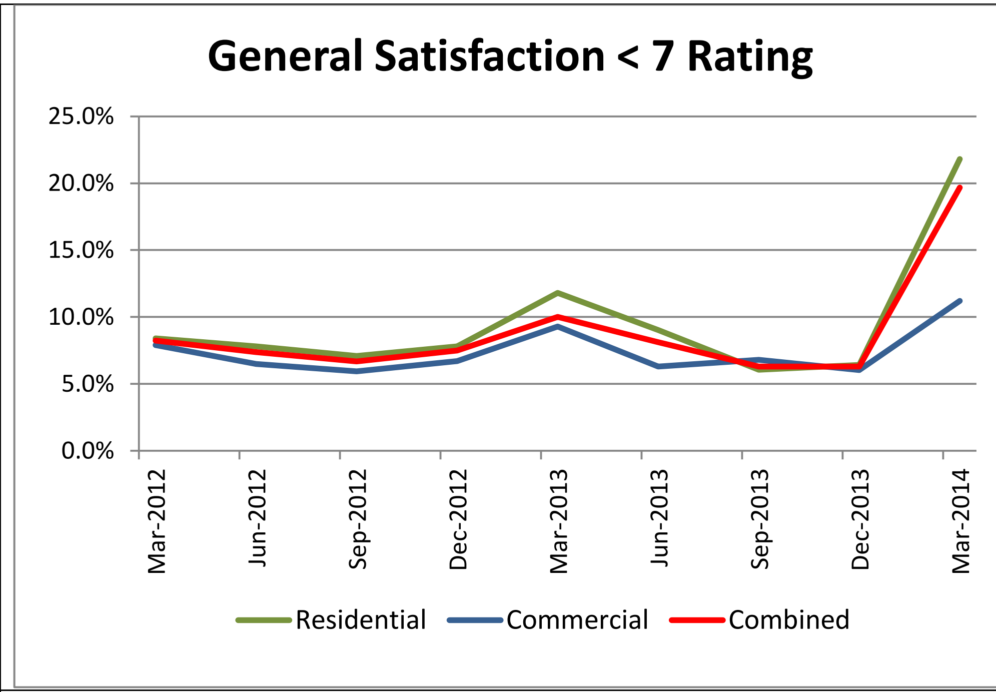
In Q1 2014 the Company changed the way it scores its customer satisfaction index. Since 2012 the Company relied on the general satisfaction number from customers for its overall score. In 2014 however the Company moved to a new index. This index is calculated using an 80/20% weight on residential/commercial customers:

- 70% weight on general satisfaction of customers who have had no contact with us.
- 10% weight on customers who had a phone transaction with us.
- 10% weight on customers who had a field transaction with us.
- 10% weight on customers who had a web transaction with us.

Given the new indexing system and change in survey methodology, the numbers from the new index and the old index may not necessarily be comparable. The overall index for Q1 2014 is 82.0% which is a historical low due to issues revolving around power reliability, pricing and high customer bills.



Mean averages the ratings provided by all customers surveyed.

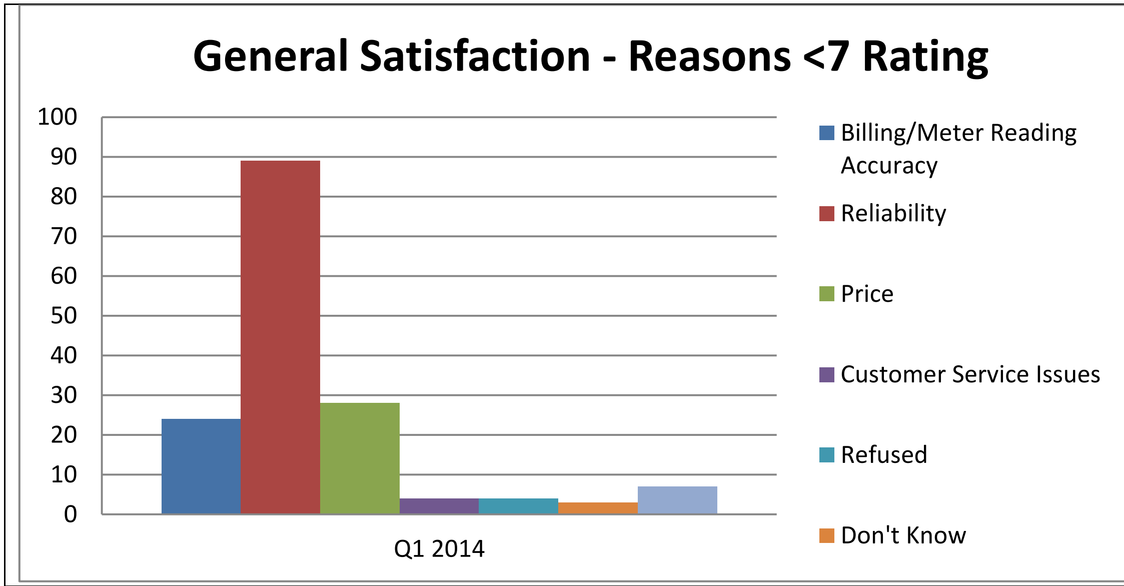


Percentage of customers surveyed that gave below a 7 rating.

The general satisfaction score is representative of the perception about Newfoundland Power from a random sample of residential and business customers who have not had any recorded transactions with the Company. It is highly susceptible to change with from external influences such as what is written in the media or major power events such as the blackouts of January 2014 and the possibility of rolling blackouts in March 2014.

General Satisfaction – 746 Customers

(Mean)	This Quarter	Last Quarter	Same Quarter Last Year
Residential	7.81	8.78	8.36
Commercial	8.37	8.76	8.60
Total	7.92	8.78	8.38
7-10 Rating	% of customer's surveyed that gave a 7-10 rating.		
Residential	78.2%	93.6%	89.2%
Commercial	88.8%	94.0%	91.7%
Total	80.3%	93.7%	90.0%

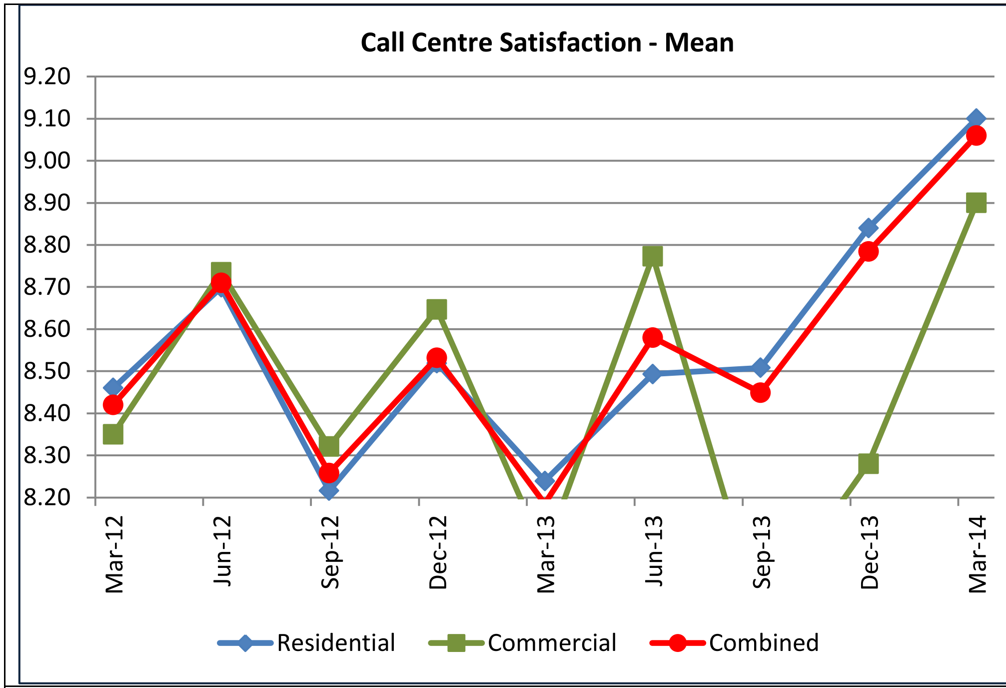


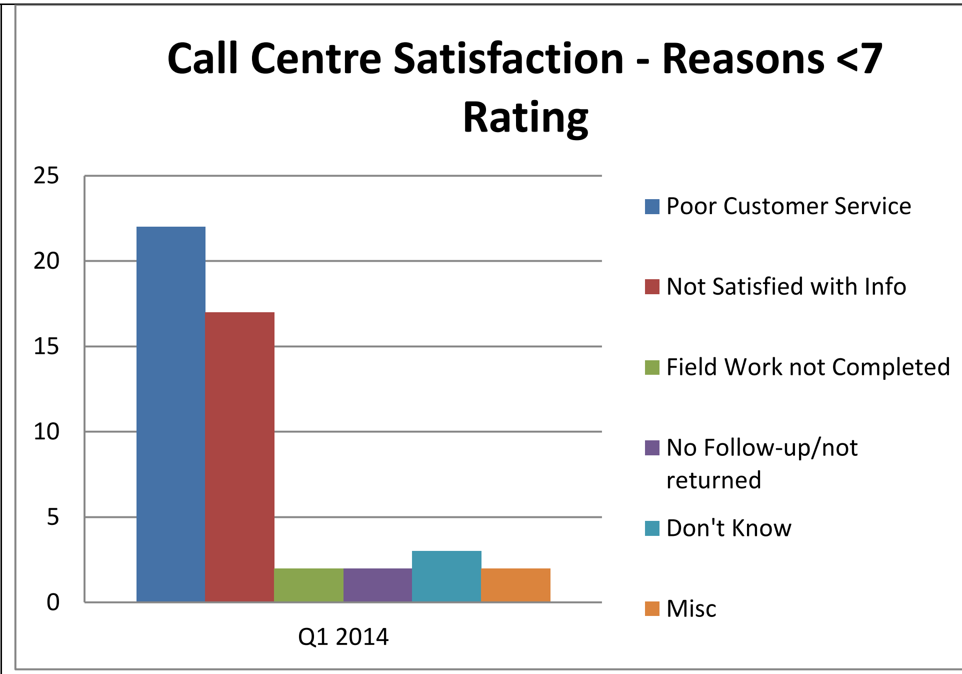
The overall satisfaction of Residential and Commercial customers is down this quarter from last quarter and the same quarter last year.

56.0% (89) of customers surveyed who gave a rating less than seven indicated reliability concerns, 17.6% (24) chose price and 15.1% (24) indicated billing or meter reading accuracy issues as the cause of their dissatisfaction.

Verbatim comments showed that customers were upset about power outages caused by system issues, and did not seem to distinguish Newfoundland Power's problems from Newfoundland and Labrador Hydro's problems.

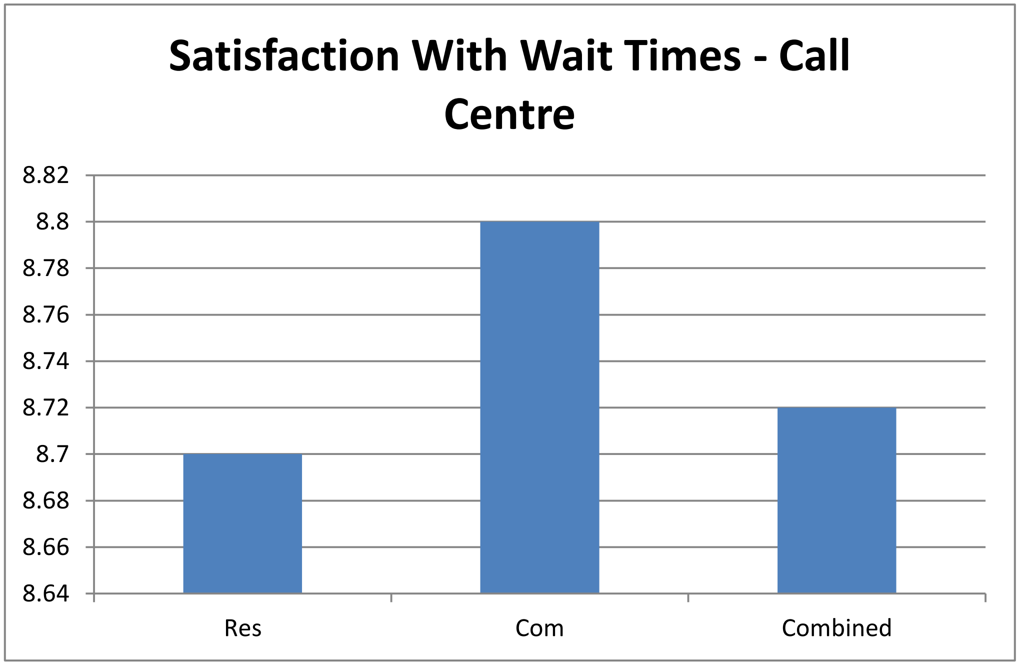
Other concerns came from high bill amounts during the winter months and customers concerned about meter reading estimates and accuracy of their bills.





Previous surveys asked randomly selected customers if they had contacted NF Power via phone. This resulted in inconsistencies in samples and therefore scores. Under the new survey methodology, customers who have actually had a phone transaction with the Company are identified and then contacted by the survey company. They are asked to remember a specific transaction with Newfoundland Power and rate their phone experience based on this recall. Scores tend to be higher among those who recall a specific transaction compared to those who do not recall one specifically.

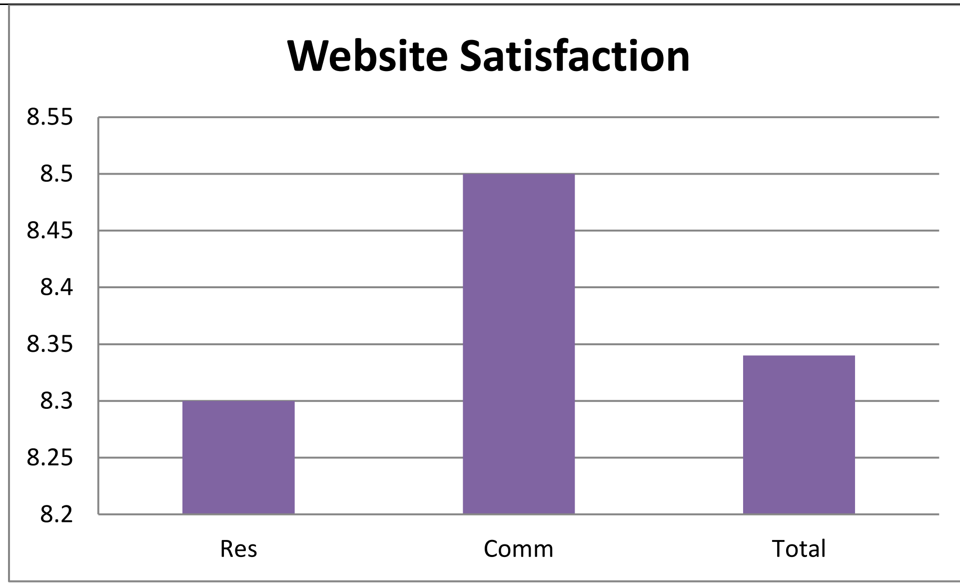
Reasons for low telephone satisfaction ratings tend to fluctuate throughout the year. Frustration from customers who had high bills and estimated meter readings appeared throughout the verbatim comments for this quarter. Other comments included dissatisfaction with the NF Power representative the customer was speaking with with words like "rude", "difficult" and "not satisfied" used by customers.



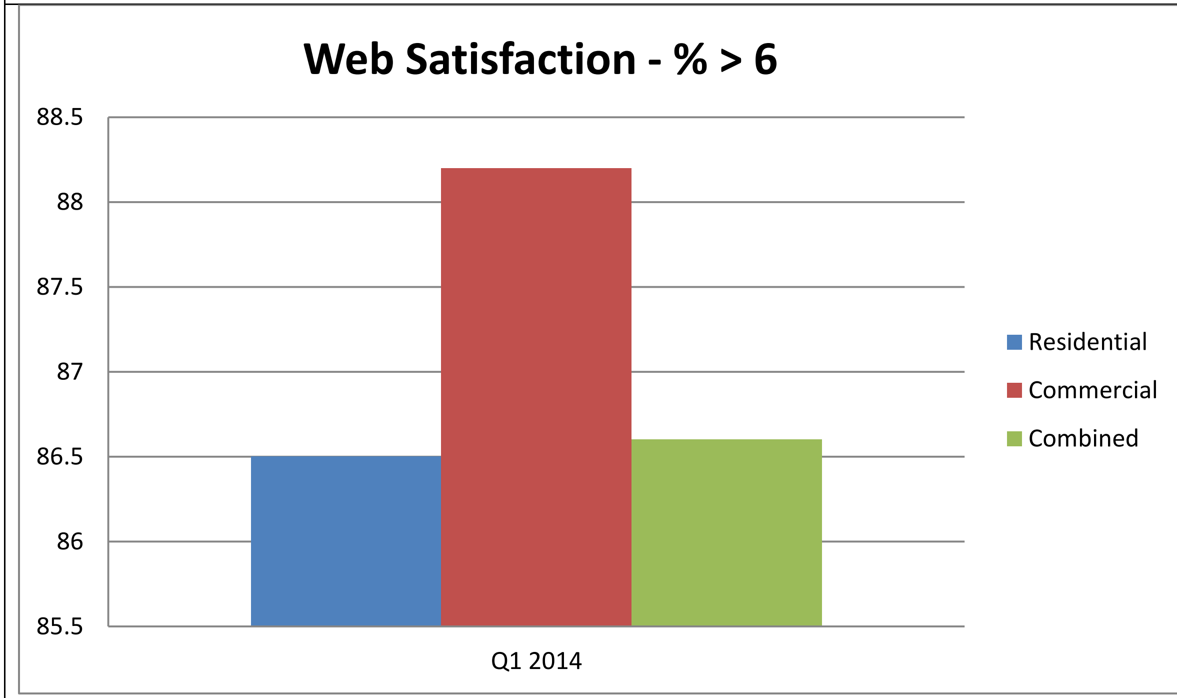
Telephone Satisfaction - 597 Customers

(Mean)	This Quarter	Last Quarter	Same Quarter Last Year
Residential	9.10	8.84	8.24
Commercial	8.90	8.28	8.07
Overall Total	9.06	8.78	8.19
7-10 Rating	% of customer's who called that gave a 7-10 rating.		
Residential	91.4%	91.6%	84.5%
Commercial	92.0%	84.8%	83.8%
Total	91.6%	88.6%	84.2%

Overall telephone satisfaction is higher this quarter which could be a result of the survey methodology which gets customers to recall specific transactions with the company and rate based upon that experience. Going forward the quarter over quarter numbers will be a more reliable indicator of any improvements or need for improvements as the survey methodology and sample size will be consistent going forward.



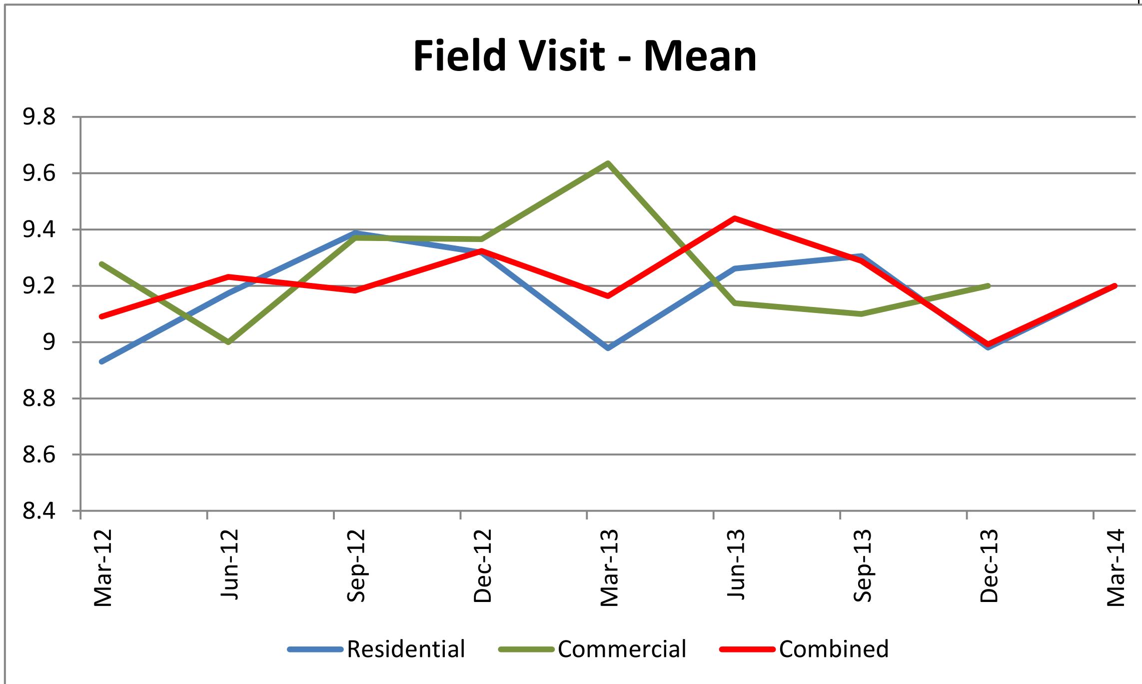
This is the first survey to capture satisfaction with the company website. Statistics show the website is becoming a preferred method of contact for customers making it important to capture their overall satisfaction with NF Power's web services. The sample for the web survey is derived from customers who have sent a request to Newfoundland Power via online self-service or who have logged in using their user profile.



Web Satisfaction – 718 Customers.

	This Quarter	Last Quarter	Same Quarter Last Year
Residential	83.0%	NA	NA
Commercial	85.0%	NA	NA
Total	83.4%	NA	NA

A large majority of the web sample surveyed were residential customers. When asked why they were dissatisfied some used the medium to communication dissatisfaction with power reliability and pricing, but others chose to communicate specific issues about the website such as the inability to pay with a credit card online and the overall layout of the website (an issue which has recently been addressed)



Field Visit Satisfaction 11.5% (137) surveyed had field visit in last 6 mos.

(Mean)	This Quarter	Last Quarter	Same Quarter Last Year
Residential	9.20	8.98	8.98
Commercial	9.20	9.10	9.37
Overall Total	9.20	8.99	9.16
7-10 Rating	% of customer's with a field visit gaving a 7-10 rating.		
Residential	96.0%	96.2%	93.3%
Commercial	100.0%	94.8%	95.1%
Overall Total	96.3%	95.6%	94.2%

Customers are generally very satisfied with our performance in the field but tend to be less satisfied with the wait times to have their work completed. The overall satisfaction with wait times for field service was 80.8%.

2014 Customer Satisfaction Transactional Surveys

Newfoundland Power
-Contact Centre-
Last Updated March 7th, 2014

Hello, my name is ______ and I am calling from MQO Research, a Newfoundland-based research company. We are calling today/tonight on behalf of Newfoundland Power to conduct a short survey on customer satisfaction related to....

CONTACT CENTRE:
...a call made by you or someone in your <household/business or organization> to Newfoundland Power during the past month or so.

May I speak with **<Recall name and business name (as appropriate) from sample>**

RESIDENTIAL INTRO: **IF NO NAME IS PROVIDED:** May I speak with the person in your household who would have made the call? Depending on your responses the survey will take about 5 minutes to complete.

BUSINESS INTRO: **IF NO NAME IS PROVIDED:** May I speak with the person in your business/organization who made the call and is responsible for interacting with Newfoundland Power on behalf of your business or organization? Depending on your responses the survey will take about 5 minutes to complete.

Do you have a few minutes to answer my questions? Please be assured that all your responses will be kept strictly confidential.

IF NEW PERSON COMES ON THE LINE: REPEAT INTRODUCTION

Yes	1	**CONTINUE**
No	2	Is there a more convenient time for me to call back? ARRANGE FOR A CALLBACK OR THANK AND TERMINATE.

IF RESPONDENT AGREES TO CONTINUE, ADD: This call may be monitored for quality purposes.

**If necessary:* The purpose of this call is not to sell you anything.*

Continue...	1	
No..	2	*Thank & Terminate*
No, not available	3	*Arrange a call back*
No, someone else...........................	4	*Identify and Restart*

IF NOT AVAILABLE, ARRANGE FOR A CALLBACK.

VALIDITY RESPONSE:
If a respondent questions the validity of the survey, the call or our organization please state:

MQO Research has been conducting research studies in Canada and abroad for 30 years. We are a Member of the Canadian Marketing Research AND Intelligence Association (MRIA) which is responsible for regulating marketing research practices in Canada. MQO Research adheres very strictly to all guidelines of professionalism and privacy as outlined by the MRIA. This study is registered with the Association. If you would like to contact the MRIA to verify the legitimacy of this research study or our company please call 1-800-554-9996 toll free and reference survey Number: **XXXX**

CONFIDENTIALITY RESPONSE:
If a respondent questions **the confidentiality** of the information that they are providing please state the following:

As a Corporate Gold Seal member of the Marketing Research Intelligence Association (MRIA) we adhere to strict standards of privacy and confidentiality. Our data is always grouped. Information will never be released to our client or any other third party in a manner that could be used to disclose your identity.

CONTACT INFORMATION RESPONSE:
If a respondent questions how MQO got their contact information please state the following:
As part of its on-going commitment to customer satisfaction, Newfoundland Power has provided MQO Research with a list of customers who had a transaction with the company over the past 3 months for the purpose of this survey. You were selected at random to participate in this survey. MQO follows the Marketing Research Intelligence Association's (MRIA's) strict privacy and protection of customer information guidelines, based on ensuring compliance with federal and provincial governments' privacy legislation.

If Necessary:
If respondent wishes to confirm the validity of the survey with Newfoundland Power provide them with the following contact information: If you would like to confirm the validity of the survey with Newfoundland Power, you can call **709-737-2802 locally or 1 800-663-2802 toll-free** and speak to an employee of Newfoundland Power.
[NOTE: Call centre at NF Power is open during regular business hours Monday to Friday]

Screening and Confirmation Questions:

Residential Only S1:

S1. Do you, or anyone in your household currently work for NF Power?

Yes	1	**Thank and Terminate**
No	2	**Continue**

CONTACT CENTRE:
S2. According to information provided to us, you placed a call to Newfoundland Power on **<RECALL DATE>**. Is this correct?

Yes	1	**Continue**
No	2	**Thank and Terminate**

Section 1: General Service

1. First, I would like to get your opinion of the overall service provided by Newfoundland Power. On a 10 point scale where 1 is “Not at all satisfied” and 10 is “Fully satisfied”, how satisfied are you with the overall service provided by Newfoundland Power? (gensat)

   1 2 3 4 5 6 7 8 9 10

   IF RESPONSE IS 6 OR LESS GO TO QUESTION 2, ELSE GO TO QUESTION 3.

2. Can you tell me the main reason why you gave a rating of _____**<Recall from Q1>?** (gensatwy)

Section 2: Contact Centre Service

3. ***[Programming note: Recall “wrap group” and “wrap description to screen ie. Recorded reason for call]*** On **<RECALL DATE>**, what was the main reason for your call to Newfoundland Power?

   DO NOT READ LIST. PROMPT IF NECESSARY. ACCEPT ALL APPROPRIATE RESPONSES. (Check boxes for multiple responses)

   1. Account Maintenance (whycall1)
   (New account hookup, moving to new address, closing an account, change of address, change of contact information etc.)
   2. Billing (whycall2)
   (billing adjustment, sign up for ebills or Equal payment plan or Automatic Payment Plan, ask about payment locations, ask a question about the bill)
   3. Meter Reading (whycall4)
   (Inquiry about a meter reading estimate, to provide a meter reading, to ask about access to meter or a meter change out)
   4. Energy Management (whycal58)
   (To ask how to reduce energy usage, find out about programs and rebates for thermostats, insulation or windows, to ask for energy efficiency advise)
   5. Credit (whycall3)
   (Find out balance owing on account, customers who are disconnected, customer who are in collection status and need to make payment arrangements)
   6. Technical and Field work (whycl791)
   (Inquiry about tree trimming, inquiry about a cabin hookup or powerline extensions, calls looking for a technician or is expecting a field visit from a technician or linesperson.)
   7. Outage Management (whycl611)
   (Outage information, report an outage, report a power emergency, report a damaged or non-working streetlight)
   8. Other (specify) **(whycloth)** **(whycltxt)**

REPRESENTATIVE(S)

4. Now, thinking about the Newfoundland Power representative(s) you spoke with on the phone, how would you rate your satisfaction towards the employee(s) who handled your call in terms of:

INTERVIEWER: If spoke to more than 1 employee, use the plural form

**If respondent talks about on-site visits by technicians, probe:* But if you consider only the part handled over the telephone to make your request, how satisfied are you with the representative you dealt with in terms of?*

**If respondent comments about satisfied with some but not others, probe:* But, overall, considering all of the representatives you dealt with to make your request, how satisfied were you with them in overall?*

Random order

a) Being courteous and polite	(1-10) NA/DK-99
b) Being respectful	(1-10) NA/DK-99
c) Making you feel like a valued customer	(1-10) NA/DK-99
d) taking the necessary time to understand your needs	(1-10) NA/DK – 99
e) providing thorough and accurate information in response to your questions	(1-10) NA/DK – 99

5. Now, considering all the aspects we just mentioned as well as anything else you might think of, **overall** how satisfied were you with the quality of service provided by the Newfoundland Power representative(s) you dealt with on this call?

INTERVIEWER: If spoke with more than one employee, use the plural form

**If respondent starts to comment about satisfied with some but not others, probe: **But, overall, considering all of the representatives you dealt with to make your request, how satisfied were you with them overall?*

______.................................... (1-10)
NA / DK.................................. 99 *Go to Q7*

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION 6, ELSE SKIP TO Q7

6. Can you tell me the main reason why you gave a rating of _____<**Recall from Q5**>

7. How satisfied would you be to speak with this/these representative(s) again during your next telephone inquiry? **[Interviewer – repeat scale as necessary, 1 means “not at all satisfied” and 10 means “fully satisfied”]**

1 2 3 4 5 6 7 8 9 10 Don’t Know

8. On a scale of 1-10, how satisfied were you with the time you had to wait before you were able to speak with a representative?

1 2 3 4 5 6 7 8 9 10 Don't Know

9. Did the Newfoundland Power representative(s) complete your request or resolve your issue the first time you called?

1. Yes **(Skip to Question 11)**
2. No **(Continue at Question 10)**

10. Can you tell me why you had to call more than once to have this issue resolved?

Section 3: Other Forms of Customer Service

Automated Power Outages System

11. During the past month, have you called Newfoundland Power's Power Outages & Emergencies line?

[Interviewer, if required: the number is 737-5711 or toll free 1-800-474-5711]

1. Yes **(Continue to Question 12)**
2. No **(Go to question 13)**

12. Now, thinking about the time(s) that you called this telephone line, how would you rate your satisfaction in terms of:

a) Your ability to get the information you were seeking (1-10) NA/DK-99
b) Timeliness of updates (1-10) NA/DK-99

Section 5: Demographic Information

D1. OBSERVE Gender of respondent (gender)

1. Male
2. Female

D2. Would you mind telling me into which of the following categories your age falls? (age)

1. 18 to 34
2. 35 to 49
3. 50 to 64
4. 65 or older

99 Refused (VOL)

D3. What is your Postal Code?

1) __________
2) Don't Know
3) Prefer Not to say

That is the end of my questions.

THANK YOU VERY MUCH FOR YOUR HELP TODAY.

Newfoundland Power
Customer Satisfaction Transactional Surveys
-Field Visits-
Last Updated March 7th, 2014

Hello, my name is ______ and I am calling from MQO Research, a Newfoundland-based research company. We are calling today/tonight on behalf of Newfoundland Power to conduct a short survey on customer satisfaction related to....

Field Representative/Technician Visit:
…a recent visit from a Newfoundland Power Field Representative to your <home/business> in the past month or so.

RESIDENTIAL INTRO: May I speak with the person your household who dealt with the Newfoundland Power Field Representative? Depending on your responses the survey will take about 5 minutes to complete.

BUSINESS INTRO: May I speak with the person in your business/organization who dealt with the Newfoundland Power Field Representative? Depending on your responses the survey will take about 5 minutes to complete.

Do you have a few minutes to answer my questions? Please be assured that all your responses will be kept strictly confidential.

IF NEW PERSON COMES ON THE LINE: REPEAT INTRODUCTION

Yes .... 1 **CONTINUE**
No .... 2 Is there a more convenient time for me to call back? ARRANGE FOR A CALLBACK OR THANK AND TERMINATE.

IF RESPONDENT AGREES TO CONTINUE, ADD: This call may be monitored for quality purposes.

If necessary: The purpose of this call is not to sell you anything.*

Continue	1	
No	2	*Thank & Terminate*
No, not available	3	*Arrange a call back*
No, someone else	4	*Identify and Restart*

IF NOT AVAILABLE, ARRANGE FOR A CALLBACK.

VALIDITY RESPONSE:
If a respondent questions the validity of the survey, the call or our organization please state:

MQO Research has been conducting research studies in Canada and abroad for 30 years. We are a Member of the Canadian Marketing Research AND Intelligence Association (MRIA) which is responsible for regulating marketing research practices in Canada. MQO Research adheres very strictly to all guidelines of professionalism and privacy as outlined by the MRIA. This study is registered with the Association. If you would like to contact the MRIA to verify the legitimacy of this research study or our company please call 1-800-554-9996 toll free and reference survey Number: **.**

CONFIDENTIALITY RESPONSE:
If a respondent questions **the confidentiality** of the information that they are providing please state the following:

As a Corporate Gold Seal member of the Marketing Research Intelligence Association (MRIA) we adhere to strict standards of privacy and confidentiality. Our data is always grouped. Information will never be released to our client or any other third party in a manner that could be used to disclose your identity.

CONTACT INFORMATION RESPONSE:
If a respondent questions how MQO got their contact information please state the following:
As part of its on-going commitment to customer satisfaction, Newfoundland Power has provided MQO Research with a list of customers who had a transaction with the company over the past 3 months for the purpose of this survey. You were selected at random to participate in this survey. MQO follows the Marketing Research Intelligence Association's (MRIA's) strict privacy and protection of customer information guidelines, based on ensuring compliance with federal and provincial governments' privacy legislation.

If Necessary:
If respondent wishes to confirm the validity of the survey with Newfoundland Power provide them with the following contact information: If you would like to confirm the validity of the survey with Newfoundland Power, you can call **709-737-2802 locally or 1 800-663-2802 toll-free** and speak to an employee of Newfoundland Power.
[NOTE: Call centre at NF Power is open during regular business hours Monday to Friday]

<u>Screening and Confirmation Questions:</u>

Residential Only S1:

S1. Do you, or anyone in your household currently work for NF Power?

Yes	1	Thank and Terminate
No	2	Continue

FIELD REPRESENTATIVE VISIT:

S2. According to information provided to us, you received a visit from a Newfoundland Power Field Representative on <RECALL DATE>. Is this correct?

Yes	1	Continue
No	2	Thank and Terminate
DK	9	Thank and Terminate

Section 1: General Service

1. First, I would like to get your opinion of the overall service provided by Newfoundland Power. On a 10 point scale where 1 is “Not at all satisfied” and 10 is “Fully satisfied”, how satisfied are you with the overall service provided by Newfoundland Power?

   1 2 3 4 5 6 7 8 9 10

   IF RESPONSE IS 6 OR LESS GO TO QUESTION 2, ELSE GO TO QUESTION 3.

2. Can you tell me the main reason why you gave a rating of _____**<Recall from Q1>?**

Section 2: Field Services

The next series of questions relate to your visit by a Newfoundland Power Field Representative.

3. Did you meet with the Newfoundland Power field representative in person?
   1. Yes **(Go to Q4)**
   2. No **(Continue)**

3b. Even if you did not deal with the Newfoundland Power field representative in person, there are some aspects of the quality of service provided by the representative that you could evaluate. ***(Go to Q4e)***

TECHNICIANS/FIELD REPS

4. Using a scale of 1 to 10, where 1 is “Not at all satisfied” and 10 is “Fully satisfied”, how satisfied were you with the quality of service provided by the field representative who came to your <house/business> in terms of …

IF NECESSARY:

**If respondent starts to comment about satisfied with some but not others, probe:* But, overall, considering both / all of the field representatives that came to your location to work on your request, how satisfied were you with them overall, in terms of the following:?*

Go to Demographics if respondent is not able to evaluate field representative

Random order (a-d) and (e-g) as separate groups

a) Being courteous and polite	(1-10) NA/DK-99
b) Being respectful	(1-10) NA/DK-99
c) Making you feel like a valued customer	(1-10) NA/DK-99
d) Being knowledgeable	
e) Keeping you up to date on the status of your work order	(1-10) NA/DK-99
f) Completing the work in a timely manner	(1-10) NA/DK-99
g) Leaving your premises in good condition	(1-10) NA/DK-99
h) Being able to deal with any issue you had	(1-10) NA/DK-99

5. Now, considering all the aspects we just mentioned as well as anything else you might think of, using the same scale, **overall** how satisfied were you with the quality of service provided by the Newfoundland Power **field representative(s)** that came to your <house/business>?
   ______.................................... (1-10)
   NA / DK................................. 99

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION 5, ELSE SKIP TO Q7

6. Can you tell me the main reason why you gave a rating of _____? <**Recall from Q4**>

7. How satisfied would you be to have this/these field representative(s)/technician(s) visit your <home/business> again should you have another request that required a visit? **[Interviewer – repeat scale as necessary, 1 means "not at all satisfied" and 10 means "fully satisfied"]**

   1 2 3 4 5 6 7 8 9 10 Don't Know

8. On a scale of 1-10, how satisfied were you with the time you had to wait between when you called for your request and when a field representative was able to meet with you to handle your request?

   1 2 3 4 5 6 7 8 9 10 Don't Know

Automated system

9. During the last month, did you make a call to the Power Outages & Emergencies number of Newfoundland Power?

   [Interviewer, if required: the number is 737-5711 or toll free 1-800-474-5711]

   1. Yes (Continue to Question 15)
   2. No (Go to Check before Question 16)

10. Now, thinking about the time(s) that you called this telephone line, how would you rate your satisfaction in terms of:

a)	Your ability to get the information you were seeking	(1-10) NA/DK-99
b)	Timeliness of updates	(1-10) NA/DK-99
c)	Ability to easily identify which menu number to press for your inquiry	(1-10) NA/DK-99

Section 4: Demographic Information

24. **OBSERVE** Gender of respondent

    1. Male
    2. Female

25. Would you mind telling me into which of the following categories your age falls?

    1. 18 to 34
    2. 35 to 49
    3. 50 to 64
    4. 65 or older

    99 Refused (VOL)

26. What is your Postal Code

    1) _________
    2) Don’t Know
    3) Prefer Not to say

That is the end of my questions.
THANK YOU VERY MUCH FOR YOUR HELP TODAY.

Newfoundland Power
Customer Satisfaction Survey
- Transactional Surveys –
Online (MyAccount and Webforms) Transactions
Last Updated March 7th, 2014

Email Script

Dear Customer,

As part of our ongoing commitment to customer service, Newfoundland Power has asked MQO Research to survey our customers who have completed an online transaction through the Newfoundland Power website over the past 3 months. Through this survey we will identify areas where Newfoundland Power has been serving you well, as well as areas where improvements are needed in order to provide you with service excellence. You have been randomly selected to participate. While the results of this survey will remain anonymous, they will be very important to ensuring continued improvements to Newfoundland Power's customer service. We thank you in advance for taking the time to share your opinions with us.

Yours truly,

Sherina Wall

Director, Customer Relations

Newfoundland Power

When you are ready to begin the survey, please click on the link below:

<insert link>

Put at Bottom of Email Script

If you would like to confirm the validity of the survey with Newfoundland Power, you can call **709-737-2802 locally or 1 800-663-2802 toll-free** and speak to an employee of Newfoundland Power. **[NOTE: The Newfoundland Power Contact Centre is open during regular business hours Monday to Friday 8:00am – 5:00pm]**

Introduction

You are being contacted today as part of Newfoundland Power's customer experience program. You or someone from this email address made a recent visit to Newfoundland Power's website www.newfoundlandpower.com in the past couple of months.

RESIDENTIAL INTRO: This survey is intended for the person in the household who visited Newfoundland Power's website, newfoundlandpower.com in the past month or so. If this is someone other than you, please have the other person complete the survey. Depending on your responses the survey will take about 5 minutes to complete.

BUSINESS INTRO: This survey is intended for the person in this business or organization who visited Newfoundland Power's website, newfoundlandpower.com in the past month or so. If this is someone other than you, please have the other person complete the survey. If more than one individual visited the website with the past month or so, please have at least one of these individuals complete the survey. Depending on your responses the survey will take about 5 minutes to complete.

VALIDITY RESPONSE:

For additional information on MQO Research, please press here…otherwise continue with the survey:

MQO Research has been conducting research studies in Canada and abroad for 30 years. We are a Member of the Canadian Marketing Research AND Intelligence Association (MRIA) which is responsible for regulating marketing research practices in Canada. MQO Research adheres very strictly to all guidelines of professionalism and privacy as outlined by the MRIA. This study is registered with the Association. If you would like to contact the MRIA to verify the legitimacy of this research study or our company please call 1-800-554-9996 toll free and reference survey Number:

CONFIDENTIALITY RESPONSE:

For information on the confidentiality of the information being provided, please press here…otherwise continue with the survey.

As a Corporate Gold Seal member of the Marketing Research Intelligence Association (MRIA) we adhere to strict standards of privacy and confidentiality. Our data is always grouped. Information will never be released to our client or any other third party in a manner that could be used to disclose your identity.

Screening and Confirmation Questions:

S1. Do you, or anyone in your household currently work for NF Power?

Yes	1	**Thank and Terminate**
No	2	**Continue**

Online Visit (MyAccount/Web forms)

S2. According to information provided, you made at least one visit to the website, newfoundlandpower.com on <RECALL DATE> . Is this correct?

Yes	1	**Continue**
No	2	**Thank**
Yes, but can't remember the exact date	3	**Continue**

Section 1: General Service

1. First, we would like to get your opinion of the overall service provided by Newfoundland Power. On a 10 point scale where 1 is "Not at all satisfied" and 10 is "Fully satisfied", how satisfied are you with the overall service provided by Newfoundland Power?

   1 2 3 4 5 6 7 8 9 10

   IF RESPONSE IS 6 OR LESS GO TO QUESTION 2, ELSE GO TO QUESTION 3.

2. What is the main reason why you gave a rating of _____**<Recall from Q1>?**

Section 2: Website Services

3. How often do you visit newfoundlandpower.com per month?

   Less than once per month
   1-2 times
   3-5 times
   6-10 times
   more than 10 times
   Don't Know

4. What was the main reason for your visit(s) to newfoundlandpower.com during the last month? Were there any other reasons?

DO NOT READ LIST. RECORD Main and Other Reasons separately

	MAIN	**OTHER**
To get information on my bill	01	1
To change account information	02	1
To fill out forms	03	1
To get information on power outage	04	1
To review my usage history	05	1
To get phone number to call customer service	06	1
Other (specify) ____________________________		

5. Now, thinking about your visit(s) to newfoundlandpower.com during the past month, were you:

   a) able to complete everything you wanted to do online, without having to call Newfoundland Power? YES/NO/NA_DK-99

   a_1) **If Yes in 5a,** were you able to complete your request or find your information easily? YES/NO/NA_DK-99

   a_2) **If No in 5a**, what else would you like to have done or what did you have to call about? (Specify)

b) If your inquiry required a response, did you receive one in a timely manner?
YES/NO/NA_DK-99

6. Overall, on a scale from 1 to 10, where 1 is not at all satisfied and 10 is fully satisfied, how satisfied are you with newfoundlandpower.com ?

1 2 3 4 5 6 7 8 9 10

IF RESPONSE IS 6 OR LESS, CONTINUE AT QUESTION 7, ELSE SKIP TO Q8

7. What is the main reason why you gave a rating of _____? <**Recall from Q6**>

8. What, if anything, would you like to see or be able to do on newfoundlandpower.com?

Section 5: Demographics

Now, just a few final questions about yourself to help us group responses.

9. Are you…

1. Male
2. Female

17. Into which of the following categories does your age fall?

1. 18 to 34
2. 35 to 49
3. 50 to 64
4. 65 or older

99 Refused (VOL)

18. What is your Postal Code?

1) _________
2) Don't Know
3) Prefer Not to say

That is the end of the questions.
THANK YOU VERY MUCH FOR YOUR HELP TODAY.

Customer Outage Survey
(March 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

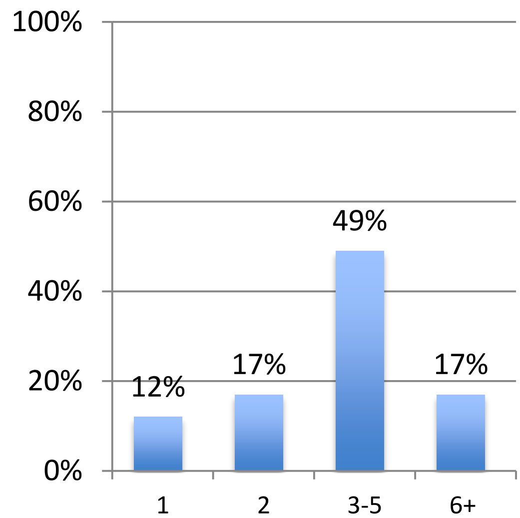
- Data Collection Method: Random telephone survey
- Sample Size: 400
- Geographic Scope: Residents of Eastern Newfoundland
  - All communities between Clarenville and the St. John's CMA* (including the Bonavista and Burin Peninsulas)
- Survey length: Approximately 15 minutes
- Margin of error: Plus or 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

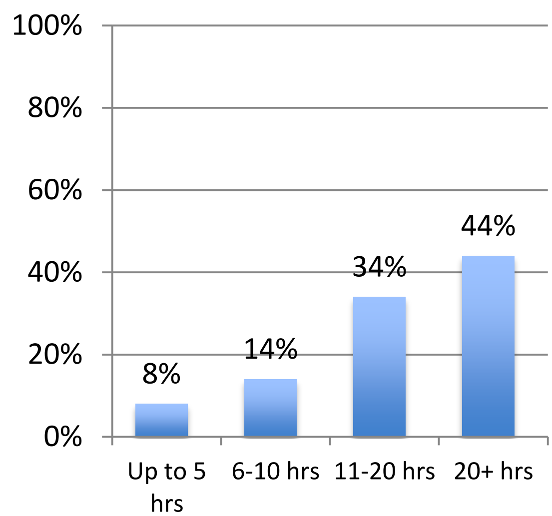
Context: In considering the responses of survey participants, the following illustrates the impacts that the outages had on NP customers.

- 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



# of Outages recalled

- 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



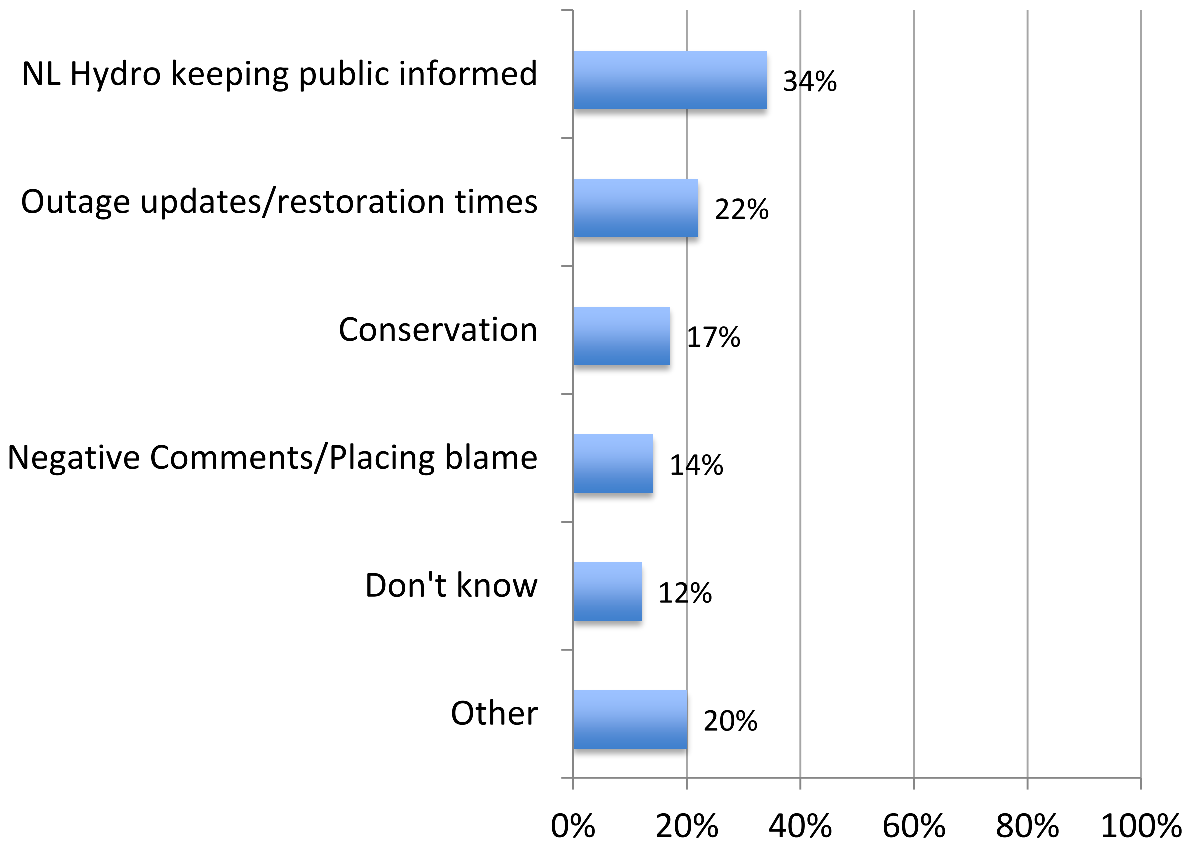
# of hours without power

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?"*

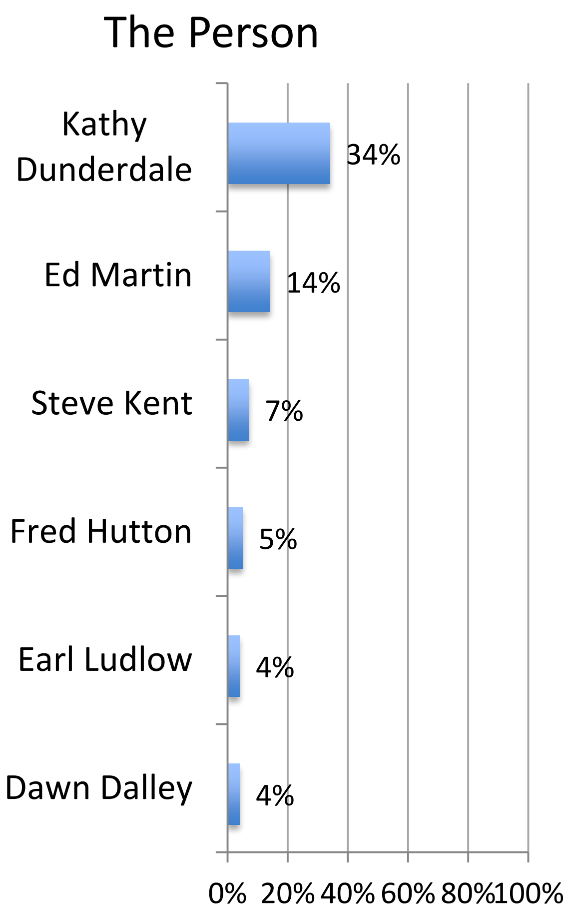


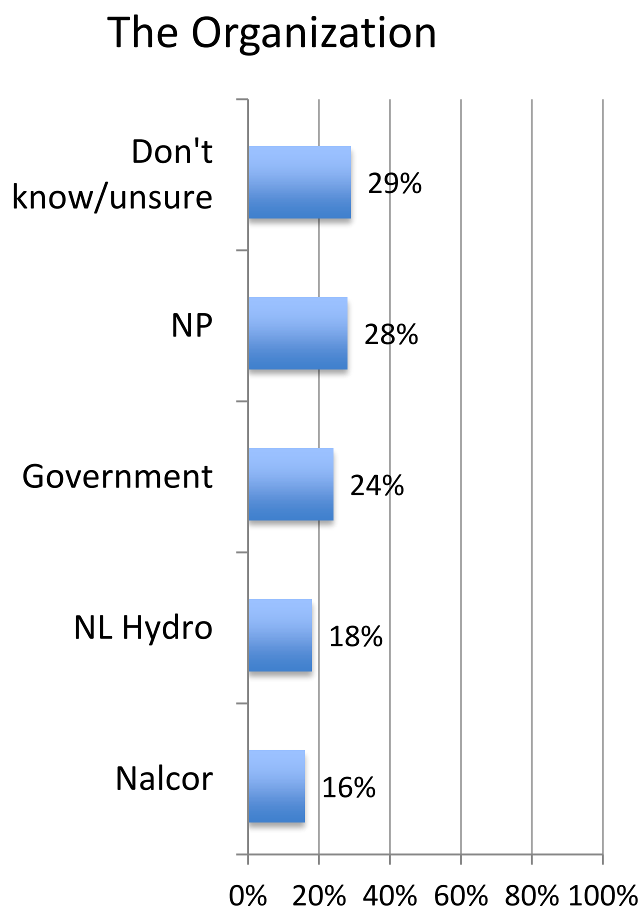
- SJ CMA customers were more aware of communications topics than those outside the CMA

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?"*



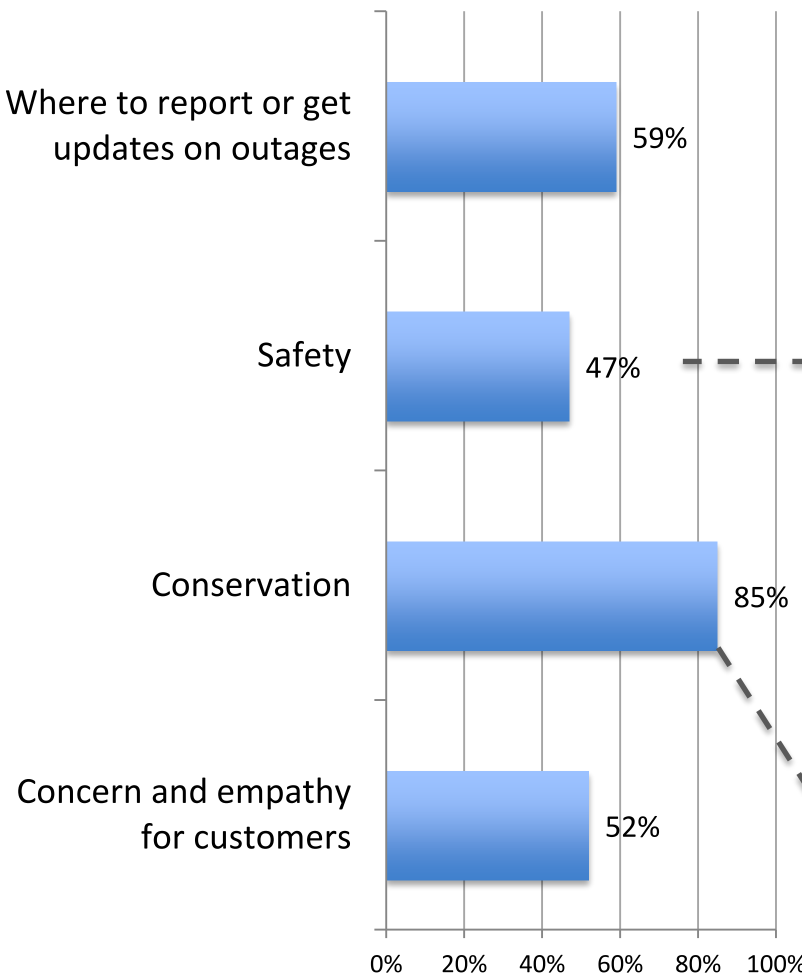


- 45% either didn't recall anyone specifically, were unsure, or couldn't remember a name
- People who referenced NL Hydro or Nalcor generally did not reference both together

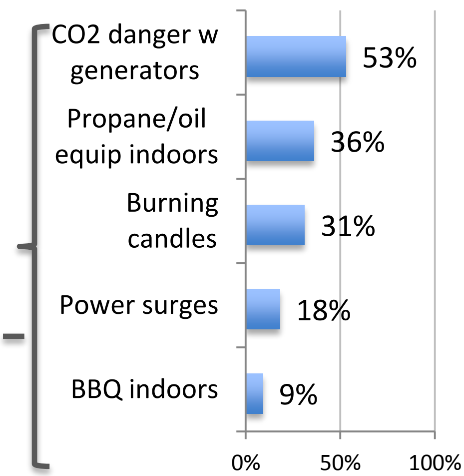
Communications Recall

Aided recall of NP messages: *"Do you recall seeing or hearing <u>any of the following</u> messages from NP?"*

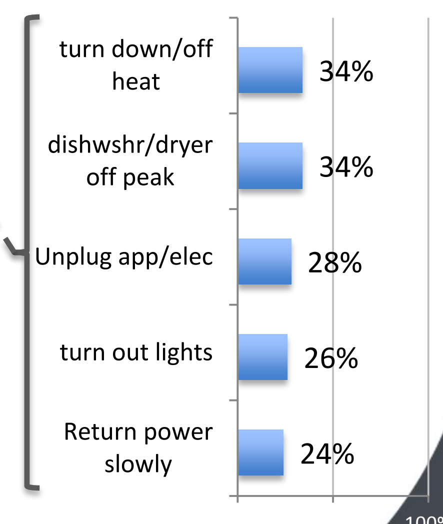
Recall of overall messages



Safety messages recalled



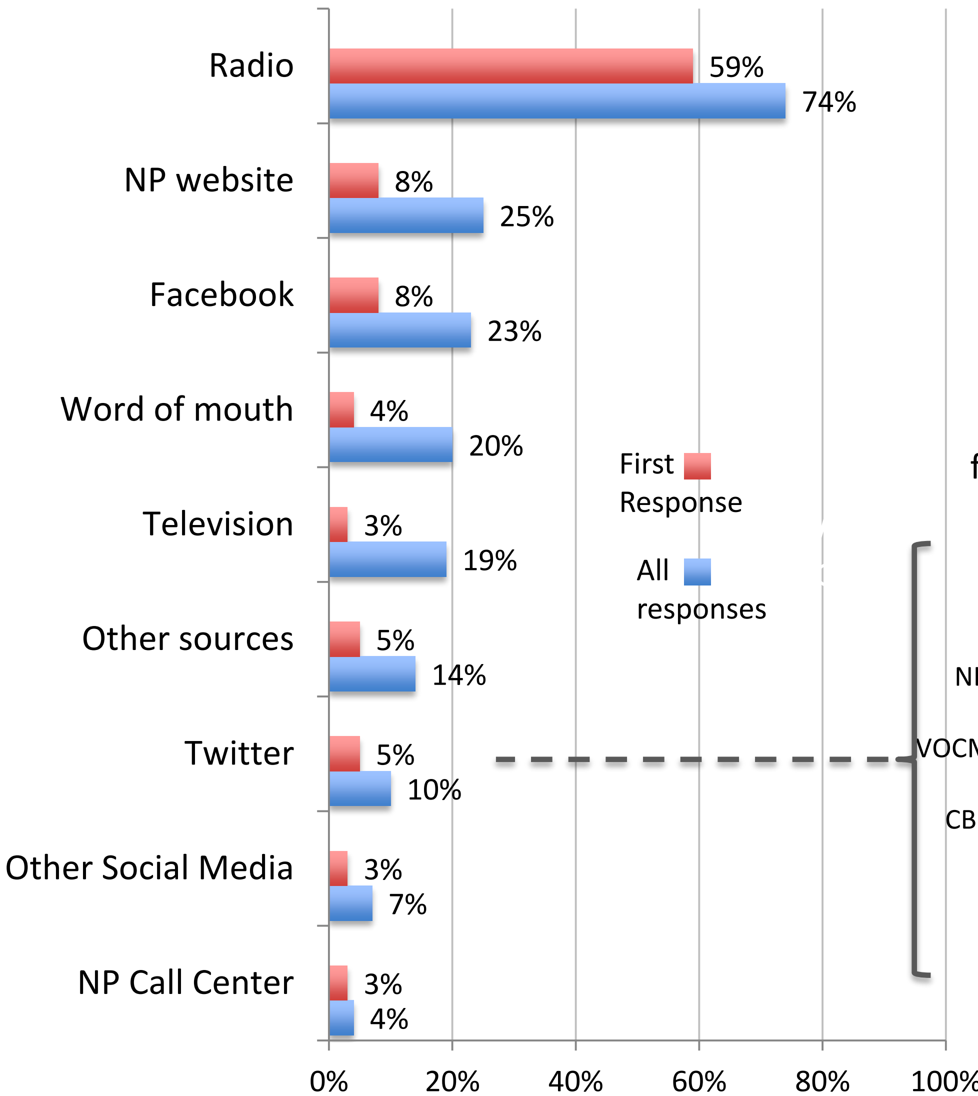
Conservation messages recalled



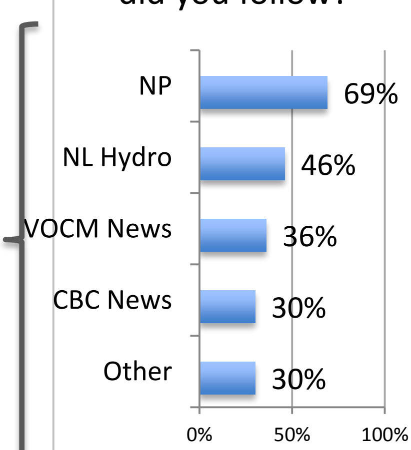
Information Sources

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?"*



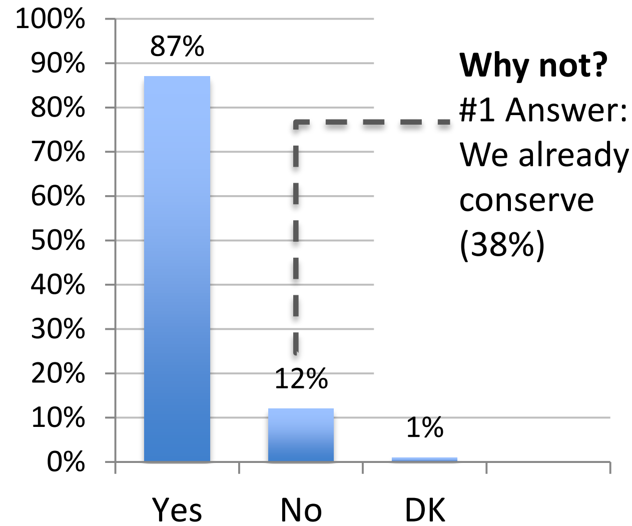
"For those who followed Twitter, who did you follow?"



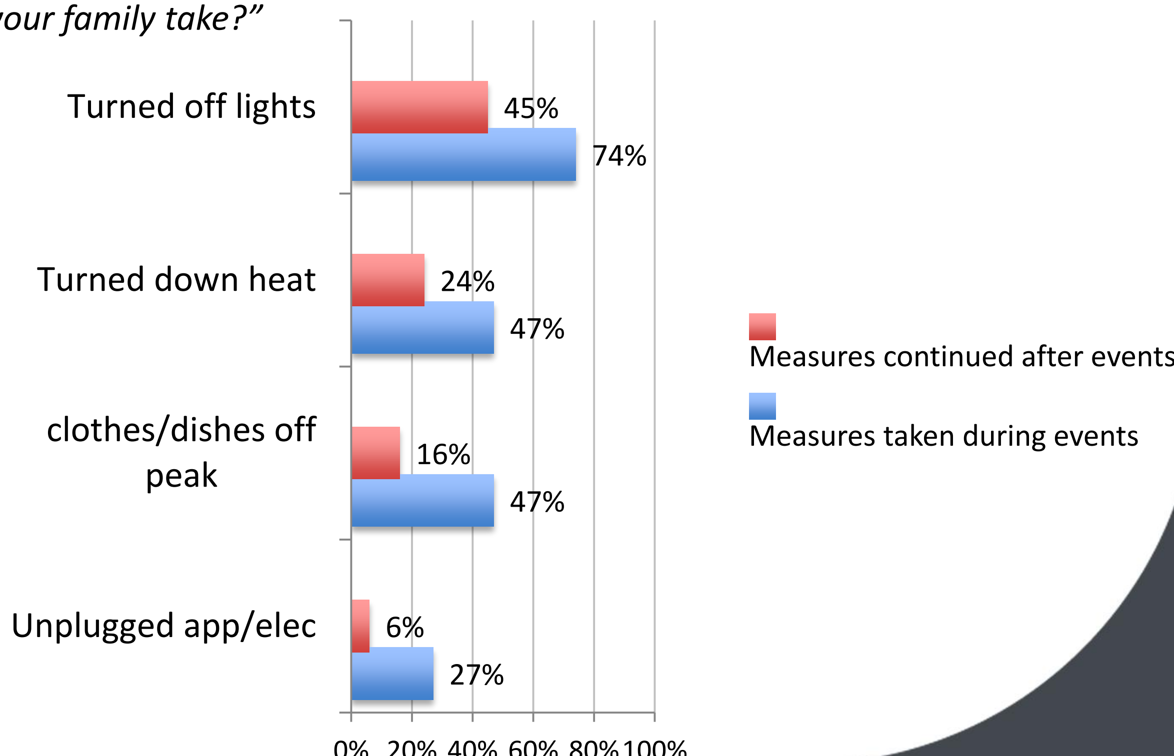
Energy Conservation

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?"*



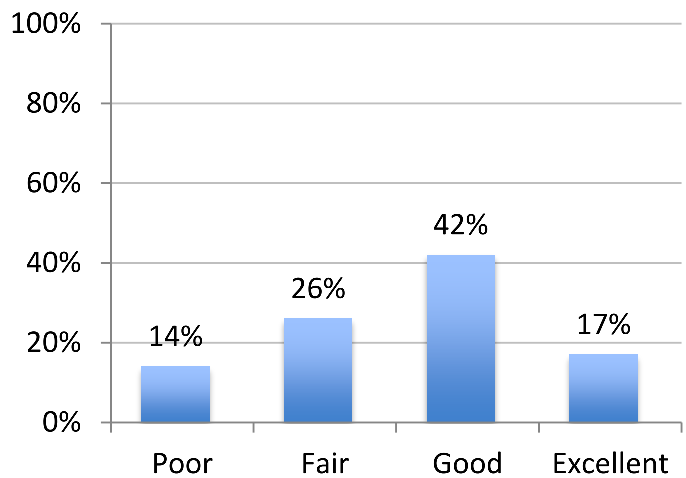
Question: *"What measures did you and your family take?"*



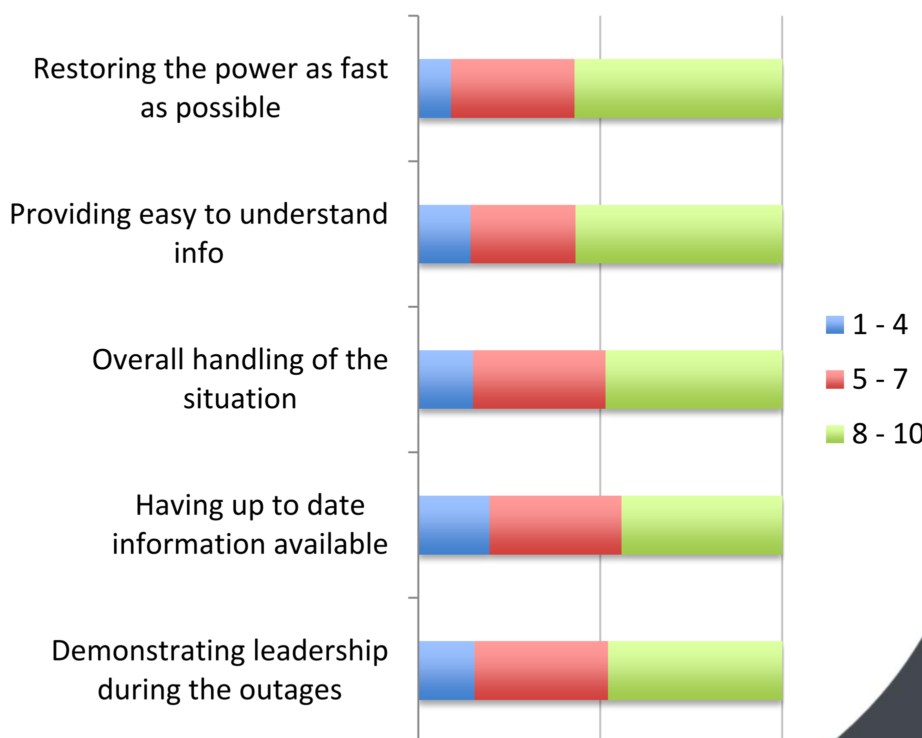
Customer Ratings of NP's Performance

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

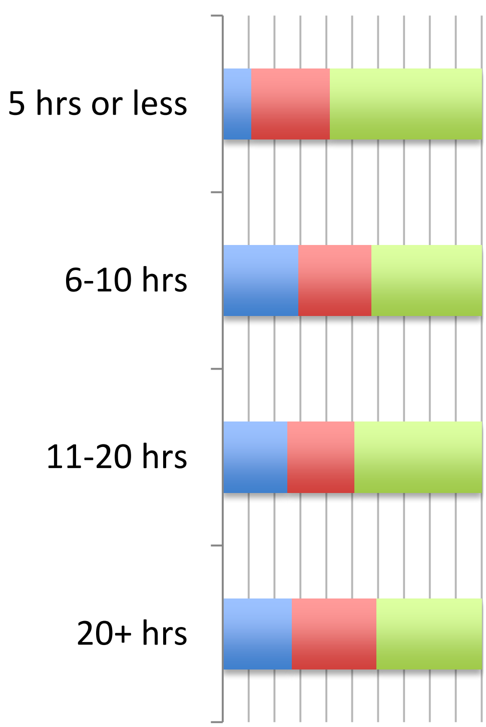
During study analysis, frequency/duration of outages was assessed to better understand how these factors may impact customers perceptions. In this case, during a major event such as occurred in January, what impact does the frequency/duration of outages have on customers perceptions of their service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

Factor #1: Frequency/Duration of Outages

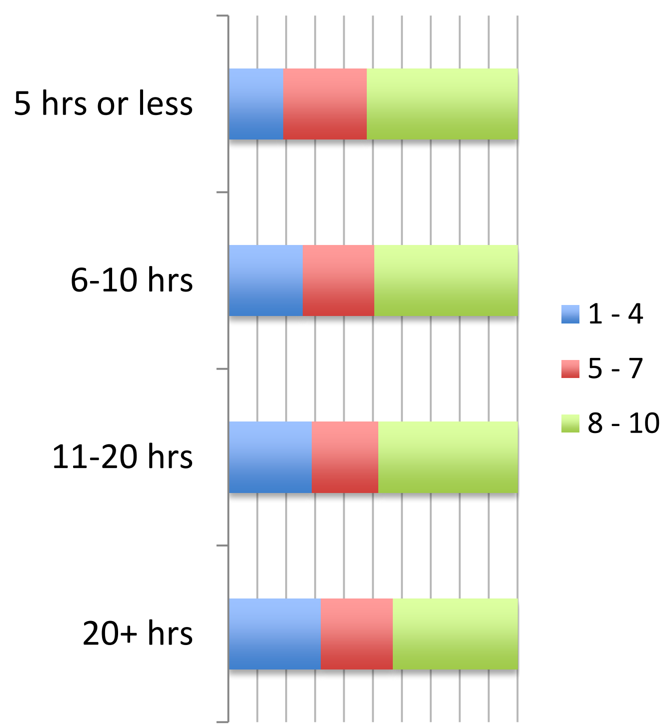
Context: Understanding how the frequency and durations of outages impacts customers attitudes and perceptions during major events, can provide valuable insight into how to adjust communications over the course of the outage(s) to meet customers information needs.

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

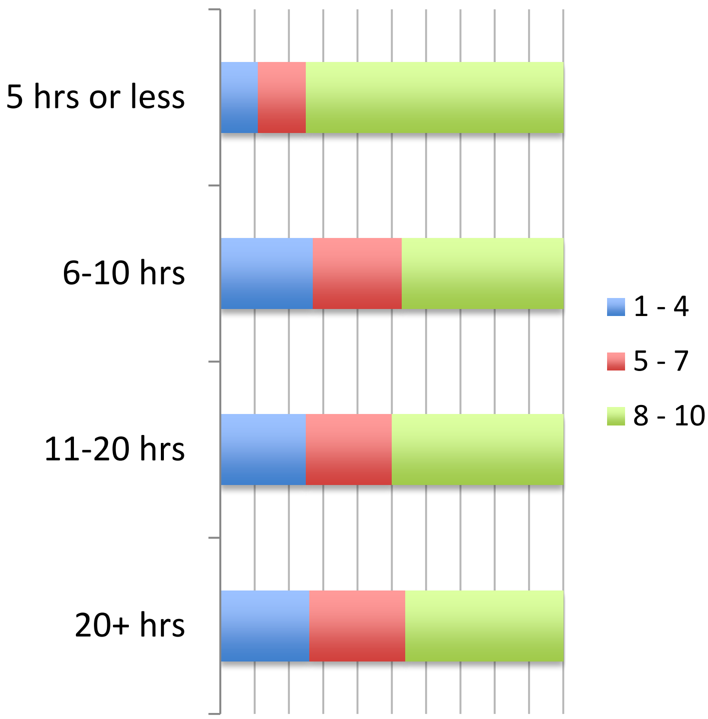
"Demonstrating leadership during the outages"



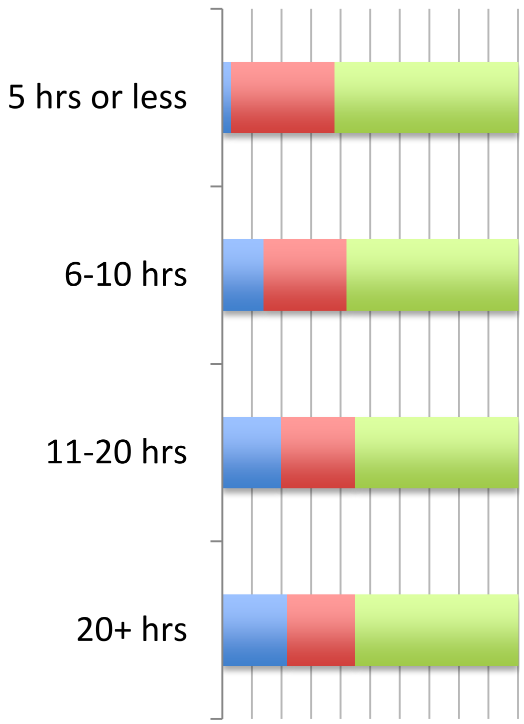
"Having up-to-date information available"



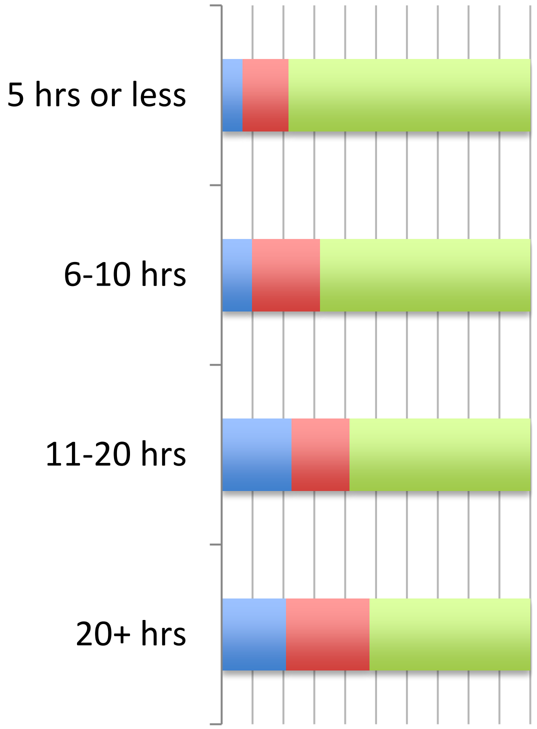
“Overall handling of the situation”



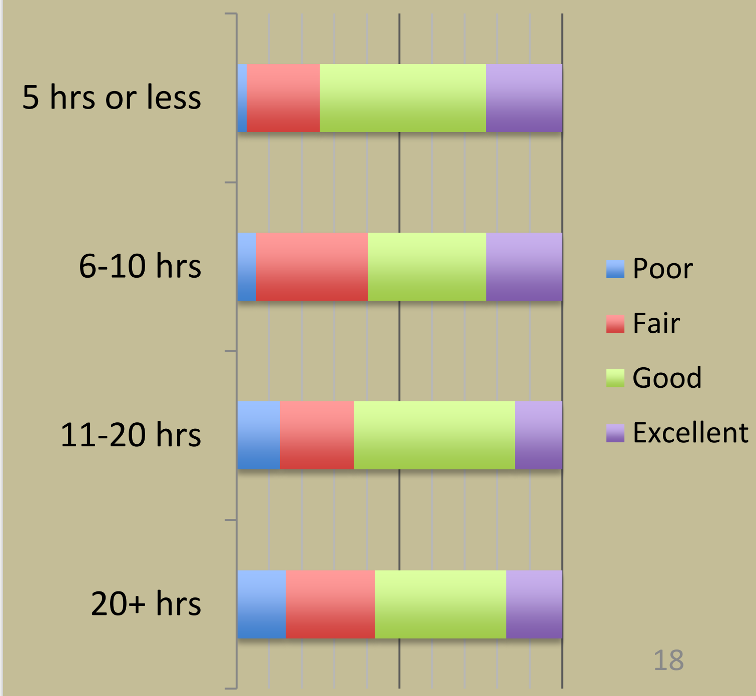
”Providing info that is easy to understand”



”Restoring power as fast as possible”



“Overall performance by NP in keeping customers informed during the outages”



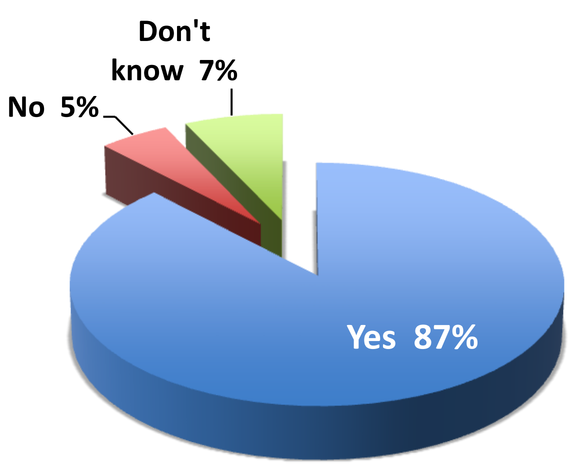
Perceived Role of Newfoundland Power

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.

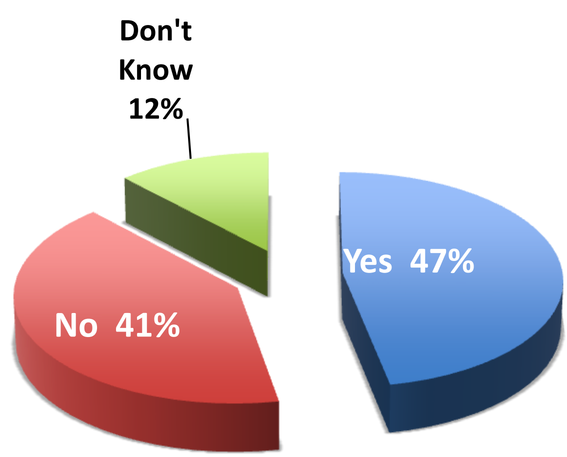
Extent of role confusion

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?"

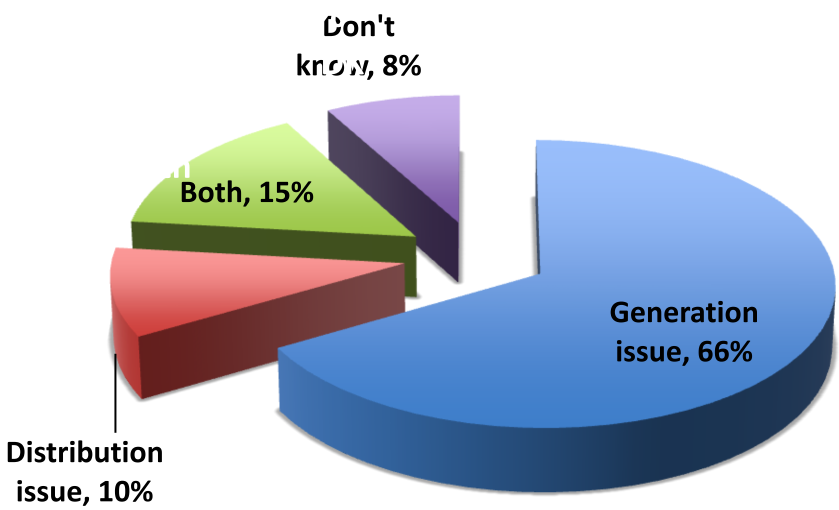


"Is NP responsible for the generation of power?"



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

Appendix A: Questionnaire

INTRODUCTION

Hello, my name is _________ from MQO Research, a professional research firm in Newfoundland and Labrador. Today we are conducting a survey about the power outage events in early January in Newfoundland and Labrador.

INTERVIEWER NOTE: If the respondent asks how long the survey will take please say: The survey should take approximately 8 minutes depending on your responses.

Is there someone between 18 and 34 years of age in your household?

IF YES: May I speak with them?

IF NOT AVAILABLE – ARRANGE CALLBACK.
IF NO ONE IN HOUSEHOLD BETWEEN 18-34 CONTINUE.

May I please speak with someone in your household who is 18 years of age or older?

[REPEAT INTRODUCTION IF NECESSARY].

ONCE CORRECT PERSON IS ON THE LINE: Do you have a few minutes to complete the survey? It will take about 8 minutes to complete.

Yes .... 01 **Thank & Continue**
No 02

IF NO: *Is there a more convenient time for me to call back?* **ARRANGE A CALLBACK OR THANK AND TERMINATE.**

IF RESPONDENT AGREES TO CONTINUE, ADD: This call may be monitored for quality purposes.

If a respondent questions the validity of the survey, the call or our organization please state: MQO Research has been conducting research studies in Canada and abroad for 30 years. We are a Gold Seal Member of the Canadian Marketing Research and Intelligence Association (MRIA) which is responsible for regulating marketing research practices in Canada. MQO Research adheres very strictly to all guidelines of professionalism and privacy as outlined by the MRIA. This study is registered with the Association. If you would like to contact the MRIA to verify the legitimacy of this research study or our company please call 1-800-554-9996 toll free and reference survey Number: XXXX.

If a respondent questions the confidentiality of the information that they are providing please state the following:

As a member of the Marketing Research and Intelligence Association (MRIA) we adhere to strict standards of privacy and confidentiality. Our data is presented in aggregate form. Information will never be released to our client or any other third party in a manner that could be used in an attempt to disclose your identity.

D1. Gender: BY OBSERVATION

Male 1
Female 2

D2. First, into which of the following broad categories does your age fall? **READ CHOICES 1 - 6**

18 – 24 1
25 – 34 2
35 – 44 3
45 – 54 4
55 – 64 5
65 or older 6
Prefer not to say 8

S1. Are you, or is anyone in your household employed by:

A newspaper, radio, television or public relations firm ....1 **Terminate**
An electrical utility..2 **Terminate**
None of the above...3 **Continue**

<u>Section 1: Outages</u>

I would like to ask you a couple questions about the power outages during the first week of January.

Q1. Did you experience any power outages at your home during the first week of January?

Yes...1
No..2 **Go to Q5**
Refused (VOL)...3 **Go to Q5**
Don't know (VOL) ....4 **Go to Q5**

Q2. Approximately, how many outages did you experience in total?

______

Refused (VOL)
Don't know (VOL)

Q3. Do you recall what the causes of the outages were?

Do Not Read List – Select All That Apply

Rotating outages 1
Loss of power supply 2
Equipment failure 3
Other (Please Specify) 3
Refused (VOL) 8
Don't know (VOL) 9

Q4. You indicated that you experienced <Q2> outages. Approximately how long was the power out during each outage?

Record for each outage _____

Refused (VOL)
Don't know (VOL)

Q5. When you think about all the communications during the power outages from news stories to interviews and direct communication through social media, what were the main points being communicated to the public? **Probe:** Can you think of any other points that were communicated?

____
____
____

Refused (VOL)
Don't know (VOL)

Q6a. What spokespeople do you recall speaking to the public about the power outages?
For each person recalled: Please indicate what company or organization they represented?

Name	Organization
___________________	_______________________
___________________	_______________________
___________________	_______________________
___________________	_______________________
___________________	_______________________
___________________	_______________________

Q7. Do you recall seeing or hearing any of the following messages from Newfoundland Power during the power outages:

a. Information on where to report or get updates on outages
b. Safety
c. Conservation
d. Concern and empathy for customers

Yes
No

Q8a. **If Yes to Q7b:** What specific messages do you recall about **safety** from Newfoundland Power?
____
____
____

Refused (VOL)
Don't know (VOL)

Q8b. **If Yes to Q7c:** What specific messages do you recall about **conservation**?
____
____
____

Refused (VOL)
Don't know (VOL)

Section 2: Performance of Newfoundland Power

Q9a. In your opinion, did Newfoundland Power do an excellent, good, fair or poor job of keeping customers informed during the outages?

Excellent.....1
Good.....2
Fair.....3
Poor.....4
Refused (VOL).....8
Don't know (VOL).....9

Q9b. Why do you say that?

____
____
____

Refused (VOL)
Don't know (VOL)

Q11. Using a scale from 1 to 10 where 1 is poor and 10 is excellent, how would you rate Newfoundland Power on the following measures?

Rotate a through e – ask f last

a. Having timely information available
b. Providing information that was easy to understand
c. Restoring power as quickly and safely as possible
d. Demonstrating leadership during the outages
e. Overall handling of the situation

Section 3: Information Sources

Next we'd like to ask you about the different ways you stayed informed during the power outages.

Q12a. What information source did you rely on most for information during the outages? What other sources of information did you use?

Do Not Read. Code First Mention, Second Mention, Third Mention, then All Other Mentions.

Twitter.....01
Facebook.....02
The Newfoundland Power website.....03
The Newfoundland Power call centre.....04
Radio.....05
Television.....06
Newspaper.....07
Word of mouth/friends/relatives.....08
Other social media (Please Specify).....09
Other sources (Please Specify).....10
Refused (VOL).....98
Don't know (VOL).....99

Q12b. **If Twitter Mentioned in Q8a:** Who did you follow on Twitter to stay informed?

NF Power.....01
NL Hydro.....02
VOCM News.....03
CBC News.....04
NTV News.....05
Friends and family.....06
Telegram.....07
Other (Please Specify).....09
Refused (VOL).....98
Don't know (VOL).....99

Section 4: Reporting Outages

Q14. Did you report an outage to Newfoundland Power at any point during the first week of January?

Yes 1
No .... 2 **Go to Section 5**
Refused (VOL) .... 8 **Go to Section 5**
Don't know (VOL) .... 9 **Go to Section 5**

Q15a. Which of the following methods did you use to report an outage?

Rotate options 1 and 2

Newfoundland Power website 1
Newfoundland Power toll-free line 2
Other (Please Specify) 3
Refused (VOL) 8
Don't know (VOL) 9

Q15b. **If Q15a=02:** Did you report the outage via the automated system or did you speak directly with a representative?

Automated system 1
Spoke directly with a representative 2
Refused (VOL) 8
Don't know (VOL) 9

Q16a. Using a scale from 1 to 10 where 1 is poor and 10 is excellent, how would you rate?

a. **If Q15a=1:** How easy it was to report the outage on the NF Power website
b. **If Q15a=2:** How easy it was to report the outage on the toll-free line

Q16b. If 6 or less in Q16ab: Why do you say that?

____
____
____

Refused (VOL)
Don't know (VOL)

Section 5: Conservation

The next series of questions are about energy conservation.

Q17a. Did you or anyone in your household practice any energy conservation measures during the power outages that you normally wouldn't have done?

Yes 1
No 2
Refused (VOL) 8
Don't know (VOL) 9

Q17b. **Ask if Q17a=No** Why not?

____
____
____

Refused (VOL)
Don't know (VOL)

Q17c. **Ask if Q17a=Yes:** What energy conservation measures did you and your family take?

Do Not Read List. Record All Mentions.

Turned off lights 1
Turned down the heat...2
Unplugged appliances/computer 3
Washed clothes/dishes in off peak times...4
Other (Please Specify) 5
Refused (VOL) 8
Don't know (VOL) 9

Q17d. **Ask if Q17a=Yes:** Which, if any, of these energy conservation measures are you still practicing?

Recall Options Selected in Q18c

Turned off lights 1
Turned down the heat...2
Unplugged appliances/computer 3
Washed clothes/dishes in off peak times...4
Other (Please Specify) 5

Refused (VOL) 8
Don't know (VOL) 9

Q18. To the best of your knowledge, is Newfoundland Power:

Rotate Options 1 and 2

a. Responsible for the distribution of power to homes in Newfoundland
b. Responsible for the generation of power

Yes 1
No 2
Refused (VOL) 8
Don't know (VOL) 9

Q19. To the best of your knowledge, were the power outages in early January a:

Rotate Options 1 and 2

Power generation issue 1
Power distribution issue 2
Both (VOL) 3
Refused (VOL) 8
Don't know (VOL) 9

Demographics

We now have a couple final questions for you. This question will **ONLY BE** used to help us analyze the results and will be kept strictly confidential.

D3. And which of the following categories best corresponds to your ***annual household income*** before taxes and deductions?

Less than $60,000 1
$60,000 to $89,999 2
$90,000 to $119,999 3
$120,000 or more 4
Prefer not to say 8

D5. What is the main heating system in your home?

Electric baseboard 01
Forced air furnace..02
Hot water furnace..03
Heating stove..04
Ground source heat pump 05
Air source heat pump...06
Fireplace...07
Radiant panels 08
Other (Please Specify) 09
Prefer not to say 10

D6. Which of the following best describes your home?

Read List. Accept One Response Only

Detached House – No Basement Apartment..1
Semi-Detached House, Townhouse or Row House (No Basement Apartment) 2
2-Apartment Home- Detached/Semi-Detached House with Apartment) 3
Downstairs Basement Apartment (in 2 Apartment Home) 4
Mobile Home...5
Apartment in Apartment Building (Doesn't Include Basement Apartment)...............6
Other (Please Specify) 7
Prefer not to say 8

D7. What are the first three digits of your postal code?

____
Prefer not to say

That's the end of the survey. Thanks very much for your time and cooperation.

Appendix B: Tabular Results

Q1: Did you experience any power outages at your home during the first week of January?

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	400	231	169	175	223	54	165	178
Yes	99%	98%	99%	99%	99%	98%	100%	97%
No	1%	1%	0%	1%	1%	2%	0%	2%
Don't Know	0%	0%	0%	0%	0%	0%	0%	1%

Q2: Approximately, how many outages did you experience in total?
SUBSET: Those who experienced some power outages.

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	394	227	167	172	220	53	165	173
1	11%	6%	18%	9%	12%	4%	12%	15%
2	16%	12%	21%	12%	19%	9%	21%	14%
3	22%	23%	21%	21%	24%	24%	17%	28%
4	17%	19%	15%	21%	14%	21%	16%	16%
5	10%	11%	8%	11%	9%	13%	10%	7%
6	7%	10%	4%	7%	8%	9%	8%	6%
7	2%	3%	1%	2%	3%	5%	1%	1%
8	1%	1%	1%	1%	1%	0%	1%	1%
9	1%	2%	0%	1%	1%	0%	1%	1%
10	3%	4%	3%	5%	2%	5%	4%	2%
11	1%	0%	2%	1%	0%	3%	0%	0%
12	1%	2%	0%	2%	1%	0%	2%	2%
15	1%	1%	0%	1%	1%	0%	1%	0%
16	0%	0%	0%	1%	0%	0%	1%	0%
17	0%	0%	0%	0%	0%	0%	0%	1%
Don't Know	6%	6%	7%	6%	7%	8%	5%	6%
Mean	4.0	4.5	3.3	4.4	3.6	4.5	4.0	3.6
N (valid responses)	372	215	157	163	207	49	158	162

Q3: Do you recall what the causes of the outages were?
SUBSET: Those who experienced some power outages.

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	394	227	167	172	220	53	165	173
Other (Please Specify)	47%	43%	52%	46%	48%	57%	46%	41%
Equipment failure	38%	38%	38%	42%	35%	36%	41%	36%
Rotating outages	23%	28%	16%	20%	25%	27%	23%	18%
Don't Know (VOL)	12%	11%	14%	11%	13%	4%	11%	20%
Loss of power supply	12%	12%	12%	11%	13%	9%	14%	13%

Q4: Approximately how long was the power out during each outage?
Outage #1 (Hours)
SUBSET: Those who experienced some power outages.

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	394	227	167	172	220	53	165	173
.02	0%	0%	1%	0%	1%	0%	1%	0%
.10	1%	0%	2%	1%	0%	3%	0%	0%
.15	0%	0%	0%	0%	0%	0%	1%	0%
.25	1%	1%	1%	0%	3%	2%	1%	1%
.33	0%	0%	0%	0%	0%	0%	0%	1%
.45	0%	0%	0%	0%	0%	0%	0%	0%
.50	1%	2%	0%	1%	1%	0%	1%	2%
1.00	10%	14%	5%	10%	10%	9%	14%	7%
1.50	0%	1%	0%	1%	0%	0%	1%	0%
2.00	10%	14%	5%	7%	12%	19%	6%	8%
2.50	1%	2%	0%	0%	2%	2%	2%	0%
3.00	4%	6%	2%	5%	4%	6%	3%	5%
3.50	0%	1%	0%	1%	0%	2%	0%	0%
4.00	3%	5%	1%	3%	4%	3%	2%	4%
5.00	3%	3%	2%	4%	1%	5%	2%	2%
5.50	0%	0%	0%	0%	0%	0%	0%	1%
6.00	2%	3%	2%	2%	2%	0%	3%	3%
7.00	3%	3%	2%	4%	2%	3%	3%	2%
8.00	3%	3%	5%	2%	4%	5%	3%	2%
9.00	3%	3%	2%	3%	3%	0%	4%	4%
9.30	0%	0%	0%	0%	0%	0%	1%	0%
10.00	3%	2%	4%	2%	4%	0%	5%	3%
11.00	1%	0%	2%	0%	1%	2%	0%	1%
12.00	7%	7%	7%	5%	8%	4%	7%	8%
12.50	0%	0%	0%	1%	0%	0%	1%	1%
12.75	0%	0%	0%	0%	0%	0%	0%	1%
13.00	2%	1%	3%	1%	3%	2%	1%	3%
13.75	0%	0%	0%	0%	0%	0%	1%	0%

14.00	5%	3%	8%	7%	3%	6%	4%	5%
14.50	0%	0%	0%	0%	0%	0%	0%	0%
15.00	2%	2%	2%	1%	2%	0%	2%	3%
16.00	3%	2%	3%	3%	2%	0%	3%	4%
17.00	1%	1%	1%	2%	0%	2%	1%	0%
18.00	2%	1%	2%	1%	2%	0%	2%	3%
19.00	1%	1%	0%	0%	1%	0%	0%	1%
20.00	1%	1%	2%	2%	1%	0%	1%	2%
21.00	0%	0%	1%	0%	0%	0%	0%	1%
22.00	0%	0%	0%	0%	0%	0%	0%	1%
23.00	0%	0%	0%	0%	0%	0%	0%	1%
24.00	6%	4%	8%	5%	7%	4%	8%	5%
25.00	0%	0%	0%	0%	0%	0%	0%	0%
26.00	1%	0%	1%	1%	0%	0%	1%	0%
26.50	0%	0%	0%	0%	0%	0%	1%	0%
27.00	0%	0%	0%	0%	1%	0%	0%	1%
28.00	0%	0%	0%	0%	0%	0%	0%	1%
29.00	0%	0%	0%	0%	0%	0%	0%	1%
30.00	1%	0%	2%	1%	0%	0%	1%	1%
31.00	0%	0%	1%	0%	0%	0%	0%	1%
32.00	0%	0%	0%	0%	0%	0%	0%	0%
34.00	0%	0%	0%	1%	0%	0%	1%	0%
36.00	3%	1%	5%	2%	3%	7%	2%	1%
38.00	0%	0%	0%	0%	0%	0%	0%	1%
40.25	0%	0%	1%	0%	1%	0%	1%	0%
45.00	0%	0%	0%	0%	0%	0%	1%	0%
48.00	3%	1%	4%	2%	3%	3%	2%	3%
50.00	1%	0%	1%	1%	0%	0%	1%	0%
72.00	0%	0%	0%	0%	0%	0%	0%	1%
90.00	0%	1%	0%	0%	1%	0%	1%	0%
Don't know	7%	7%	7%	10%	5%	13%	6%	5%
Mean	12.0	8.7	16.5	12.4	11.8	9.8	12.9	12.7
N (valid responses)	370	214	156	157	211	46	156	165

Q4: Approximately how long was the power out during each outage?
Outage #2 (Hours)
SUBSET: Those who experienced some power outages.

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	330	205	125	148	180	49	140	138
.02	0%	0%	0%	0%	0%	0%	0%	1%
.10	0%	1%	0%	0%	1%	0%	1%	0%
.15	0%	0%	1%	0%	0%	0%	1%	0%
.25	2%	2%	1%	2%	2%	4%	1%	1%
.30	1%	0%	2%	2%	0%	3%	0%	0%
.45	0%	0%	0%	0%	0%	0%	1%	0%
.50	3%	2%	3%	3%	2%	2%	2%	4%
.75	1%	2%	0%	2%	1%	0%	1%	3%
.90	0%	0%	0%	0%	0%	0%	0%	1%
1.00	19%	24%	11%	19%	20%	23%	20%	15%
1.50	2%	3%	1%	4%	0%	2%	2%	3%
2.00	11%	12%	9%	10%	12%	12%	10%	9%
2.50	2%	3%	0%	0%	4%	2%	2%	2%
3.00	9%	12%	5%	11%	7%	8%	10%	8%
4.00	3%	3%	4%	5%	2%	3%	1%	6%
4.50	0%	0%	0%	0%	0%	0%	0%	1%
5.00	6%	6%	5%	4%	8%	6%	4%	9%
6.00	3%	3%	3%	3%	3%	0%	2%	7%
7.00	2%	2%	2%	1%	3%	2%	2%	2%
8.00	4%	1%	7%	3%	4%	2%	5%	2%
9.00	2%	1%	3%	2%	2%	0%	2%	3%
10.00	2%	2%	1%	2%	2%	0%	3%	2%
11.00	1%	0%	2%	1%	0%	0%	1%	1%
11.50	0%	0%	1%	0%	0%	0%	1%	0%
12.00	4%	2%	8%	5%	4%	0%	6%	6%
13.00	1%	1%	3%	0%	3%	2%	1%	1%
14.00	1%	0%	1%	0%	1%	0%	1%	1%
15.00	1%	1%	2%	0%	2%	2%	1%	1%
16.00	1%	1%	1%	0%	2%	0%	2%	1%
18.00	1%	0%	2%	1%	1%	0%	2%	0%
19.00	1%	1%	0%	0%	1%	2%	0%	0%
20.00	1%	0%	2%	2%	0%	0%	2%	1%
20.25	0%	0%	1%	0%	0%	0%	1%	0%
21.00	0%	0%	1%	0%	0%	0%	0%	1%
22.00	0%	0%	1%	0%	1%	0%	1%	0%
24.00	2%	1%	4%	4%	0%	3%	2%	1%
25.00	0%	0%	0%	0%	0%	0%	0%	1%
26.00	1%	0%	2%	2%	0%	3%	0%	0%
27.00	1%	0%	2%	1%	0%	0%	2%	0%
28.00	0%	0%	0%	0%	0%	0%	0%	1%

29.00	1%	0%	2%	0%	1%	2%	0%	0%
30.00	1%	1%	0%	0%	1%	2%	0%	0%
90.00	0%	0%	0%	1%	0%	0%	1%	0%
Don't know	9%	10%	8%	13%	6%	17%	7%	5%
Mean	6.3	4.7	8.7	6.3	6.3	6.0	7.1	5.4
N (valid responses)	306	188	118	133	171	41	131	131

Q4: Approximately how long was the power out during each outage?
Outage #3 (Hours)
SUBSET: Those who experienced some power outages.

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	261	175	86	125	135	44	104	111
.02	0%	0%	1%	0%	0%	0%	0%	1%
.05	1%	0%	3%	2%	0%	3%	0%	0%
.15	2%	0%	5%	2%	1%	3%	2%	0%
.25	1%	2%	1%	1%	1%	2%	1%	1%
.30	1%	0%	1%	0%	1%	0%	1%	0%
.50	2%	2%	1%	2%	3%	0%	1%	5%
.75	2%	3%	2%	1%	4%	0%	3%	5%
1.00	28%	30%	23%	23%	32%	35%	27%	21%
1.25	0%	0%	1%	0%	0%	0%	0%	1%
1.50	4%	4%	3%	5%	2%	0%	2%	10%
2.00	13%	13%	13%	11%	16%	13%	12%	15%
2.50	2%	2%	3%	3%	2%	0%	5%	2%
3.00	7%	9%	3%	9%	5%	4%	10%	6%
3.50	1%	1%	0%	1%	0%	2%	0%	0%
4.00	2%	2%	3%	2%	3%	0%	3%	4%
5.00	3%	2%	3%	2%	3%	2%	1%	5%
6.00	5%	3%	8%	5%	3%	2%	7%	4%
8.00	3%	4%	2%	2%	3%	2%	5%	2%
9.00	1%	1%	1%	1%	1%	0%	2%	1%
10.00	1%	0%	3%	2%	1%	3%	0%	1%
11.00	1%	0%	1%	1%	0%	0%	1%	1%
12.00	4%	4%	3%	5%	2%	4%	4%	2%
14.00	1%	1%	1%	2%	1%	0%	3%	1%
15.00	1%	0%	1%	1%	1%	0%	1%	1%
24.00	0%	0%	1%	1%	0%	0%	1%	0%
26.00	1%	1%	0%	0%	1%	2%	0%	0%
30.00	0%	0%	1%	0%	0%	0%	0%	1%
48.00	1%	1%	0%	1%	0%	2%	0%	0%
Don't know	13%	13%	13%	13%	13%	19%	10%	12%
Mean	3.8	3.9	3.7	4.5	3.0	4.5	3.8	3.1
N (valid responses)	230	154	76	111	118	36	94	98

Q4: Approximately how long was the power out during each outage?
Outage #4 (Hours)
SUBSET: Those who experienced some power outages.

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	166	121	45	86	79	29	75	61
.02	0%	0%	1%	0%	1%	0%	0%	1%
.05	2%	0%	5%	3%	0%	5%	0%	0%
.15	2%	0%	6%	3%	1%	5%	1%	0%
.25	2%	1%	2%	0%	4%	3%	2%	0%
.50	5%	3%	8%	4%	6%	4%	6%	5%
.60	0%	1%	0%	0%	1%	0%	0%	2%
.75	2%	4%	0%	3%	2%	3%	0%	5%
1.00	31%	34%	25%	30%	33%	45%	25%	24%
1.50	4%	5%	1%	5%	3%	3%	2%	8%
2.00	12%	11%	14%	8%	15%	3%	14%	17%
2.50	4%	3%	5%	4%	3%	0%	6%	3%
3.00	5%	5%	4%	6%	4%	0%	7%	7%
4.00	2%	2%	1%	2%	2%	3%	1%	2%
5.00	2%	1%	4%	3%	1%	0%	6%	0%
6.00	2%	3%	1%	4%	1%	3%	1%	3%
7.00	1%	1%	0%	1%	1%	0%	0%	3%
8.00	2%	3%	0%	1%	3%	0%	4%	2%
10.00	1%	1%	2%	1%	1%	0%	3%	0%
11.00	1%	0%	2%	1%	0%	0%	2%	0%
12.00	2%	3%	0%	2%	3%	3%	0%	5%
14.00	1%	2%	0%	1%	2%	0%	3%	0%
16.00	0%	1%	0%	1%	0%	0%	1%	0%
18.00	0%	1%	0%	1%	0%	0%	0%	2%
24.00	1%	0%	3%	2%	0%	0%	2%	0%
Don't know	15%	15%	14%	17%	12%	20%	13%	12%
Mean	2.9	2.9	2.7	3.2	2.5	1.6	3.7	2.9
N (valid responses)	144	104	40	73	70	23	66	54

Q4: Approximately how long was the power out during each outage?
Outage #5 (Hours)
SUBSET: Those who experienced some power outages.

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	102	79	23	54	47	18	49	34
.02	1%	0%	2%	0%	1%	0%	0%	2%
.05	3%	0%	9%	5%	0%	8%	0%	0%
.10	1%	0%	3%	1%	0%	0%	0%	3%
.15	4%	2%	9%	5%	3%	12%	0%	0%
.25	2%	3%	0%	0%	5%	5%	0%	3%
.50	7%	2%	20%	11%	3%	8%	4%	11%
.75	1%	2%	0%	0%	2%	0%	3%	0%
1.00	26%	31%	14%	31%	22%	20%	33%	24%
1.50	5%	6%	3%	5%	5%	5%	2%	12%
2.00	6%	9%	0%	7%	5%	0%	12%	6%
2.50	7%	5%	12%	4%	10%	6%	9%	3%
3.00	9%	11%	3%	9%	7%	5%	10%	9%
4.00	2%	2%	3%	1%	4%	0%	4%	3%
5.00	3%	2%	5%	3%	3%	5%	3%	0%
8.00	1%	1%	0%	0%	1%	0%	1%	0%
10.00	2%	2%	0%	2%	2%	0%	2%	3%
12.00	1%	1%	0%	1%	0%	0%	0%	3%
21.00	2%	2%	0%	0%	3%	5%	0%	0%
24.00	1%	0%	4%	0%	2%	0%	2%	0%
Don't know	18%	18%	15%	15%	21%	22%	14%	18%
Mean	2.5	2.6	2.3	1.7	3.5	2.4	2.8	2.1
N (valid responses)	85	65	20	46	38	14	42	28

Q4: Approximately how long was the power out during each outage?
Outage #6 (Hours)
SUBSET: Those who experienced some power outages.

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	67	54	13	36	31	11	33	23
.10	1%	0%	5%	2%	0%	0%	0%	5%
.15	4%	0%	16%	7%	0%	12%	0%	0%
.25	2%	3%	0%	0%	5%	8%	0%	0%
.50	8%	6%	16%	9%	7%	20%	2%	4%
1.00	31%	35%	18%	32%	30%	16%	37%	40%
1.50	4%	6%	0%	4%	5%	0%	5%	9%
2.00	11%	12%	7%	15%	5%	16%	10%	4%
2.50	4%	5%	0%	0%	8%	0%	8%	0%
3.00	5%	6%	5%	6%	5%	0%	8%	8%
4.00	2%	1%	5%	2%	2%	0%	2%	5%
5.00	1%	0%	3%	0%	2%	0%	0%	3%
6.00	2%	3%	0%	2%	2%	0%	5%	0%
8.00	1%	1%	0%	2%	0%	0%	0%	4%
14.00	1%	1%	0%	0%	2%	0%	2%	0%
28.00	2%	2%	0%	0%	4%	0%	4%	0%
Don't know	20%	18%	27%	18%	23%	28%	17%	18%
Mean	2.3	2.6	1.2	1.6	3.2	.9	3.5	1.9
N (valid responses)	55	45	10	30	25	8	28	19

Q4: Approximately how long was the power out during each outage?
Outage #7 (Hours)
SUBSET: Those who experienced some power outages.

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	38	32	6	23	15	6	19	13
.15	7%	0%	25%	11%	0%	21%	0%	0%
.25	2%	3%	0%	0%	5%	0%	0%	8%
.50	11%	16%	0%	9%	16%	13%	0%	31%
1.00	36%	45%	11%	35%	37%	13%	60%	22%
1.50	2%	2%	0%	3%	0%	0%	0%	7%
2.00	4%	5%	0%	4%	4%	0%	9%	0%
2.50	3%	4%	0%	0%	7%	0%	7%	0%
3.00	6%	8%	0%	7%	4%	0%	9%	7%
4.00	4%	2%	7%	3%	4%	0%	4%	8%
Don't know	26%	15%	57%	28%	23%	54%	11%	16%
Mean	1.2	1.3	1.0	1.2	1.3	.5	1.5	1.2
N (valid responses)	31	28	3	19	12	3	17	11

Q4: Approximately how long was the power out during each outage?
Outage #8 (Hours)
SUBSET: Those who experienced some power outages.

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	31	26	5	20	11	3	17	11
.15	8%	0%	28%	12%	0%	33%	0%	0%
.25	3%	4%	0%	0%	8%	0%	0%	10%
.33	2%	3%	0%	3%	0%	0%	0%	9%
.50	2%	3%	0%	3%	0%	0%	0%	9%
.75	4%	5%	0%	0%	12%	0%	7%	0%
1.00	26%	37%	0%	24%	30%	0%	48%	9%
1.50	2%	3%	0%	3%	0%	0%	0%	9%
2.00	13%	14%	8%	15%	7%	0%	16%	18%
2.50	4%	5%	0%	0%	12%	0%	7%	0%
3.00	2%	3%	0%	0%	7%	0%	4%	0%
4.00	2%	3%	0%	0%	7%	0%	4%	0%
4.50	2%	3%	0%	3%	0%	0%	0%	9%
6.00	2%	3%	0%	3%	0%	0%	0%	9%
Don't know	28%	13%	64%	32%	20%	67%	13%	19%
Mean	1.5	1.7	.6	1.5	1.6	.2	1.5	2.0
N (valid responses)	25	23	2	16	9	1	15	9

Q4: Approximately how long was the power out during each outage?
Outage #9 (Hours)
SUBSET: Those who experienced some power outages.

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	27	24	3	18	9	3	15	9
.15	9%	0%	33%	13%	0%	33%	0%	0%
.25	6%	8%	0%	4%	10%	0%	6%	12%
.50	5%	7%	0%	7%	0%	0%	0%	22%
.75	3%	4%	0%	4%	0%	0%	0%	11%
1.00	26%	36%	0%	25%	28%	0%	43%	22%
1.50	3%	4%	0%	4%	0%	0%	0%	11%
2.00	8%	11%	0%	8%	8%	0%	11%	11%
2.50	4%	6%	0%	0%	14%	0%	8%	0%
3.00	6%	8%	0%	4%	8%	0%	11%	0%
4.00	2%	3%	0%	0%	8%	0%	5%	0%
Don't know	29%	14%	67%	31%	24%	67%	15%	12%
Mean	1.2	1.4	.2	1.0	1.8	.2	1.7	.9
N (valid responses)	22	21	1	15	7	1	13	8

Q4: Approximately how long was the power out during each outage?
Outage #10 (Hours)
SUBSET: Those who experienced some power outages.

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	23	20	3	15	8	3	13	7
.15	11%	0%	33%	15%	0%	33%	0%	0%
.50	3%	4%	0%	4%	0%	0%	0%	14%
.75	3%	4%	0%	4%	0%	0%	0%	14%
1.00	29%	42%	0%	29%	28%	0%	48%	29%
2.00	9%	14%	0%	9%	9%	0%	13%	14%
2.50	5%	7%	0%	0%	16%	0%	10%	0%
3.00	3%	4%	0%	0%	9%	0%	6%	0%
3.50	3%	4%	0%	4%	0%	0%	0%	14%
4.00	3%	4%	0%	0%	9%	0%	6%	0%
Don't know	33%	17%	67%	35%	28%	67%	17%	15%
Mean	1.4	1.6	.2	1.1	2.1	.2	1.7	1.5
N (valid responses)	18	17	1	12	6	1	11	6

Q5: When you think about all the communications during the power outages from news stories to interviews and direct communication through social media, what were the main points being communicated to the public?

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	400	231	169	175	223	54	165	178
NL Hydro keeping Public informed of progress/ plans to rectify the problem/cause of the problem	34%	34%	34%	35%	33%	37%	40%	23%
Power outage updates/Expected restoration times	22%	26%	17%	21%	23%	21%	22%	24%
Importance of Conservation/ Conservation Tips	17%	21%	12%	15%	19%	22%	18%	13%
Negative comments / Placing Blame towards Hydro, Government and former Primer Kathy Dunderdale	14%	13%	16%	15%	14%	16%	14%	13%
Don't know	12%	7%	19%	11%	13%	10%	10%	15%
Potential cause of problem / Power outages (General)	8%	9%	6%	9%	6%	6%	3%	15%
Emergency Information/Warm Centers/Public Information example; Gas stations, grocery stores open	4%	5%	3%	3%	5%	2%	6%	4%
Lack of information/ Not enough factual information	4%	5%	2%	4%	4%	3%	3%	5%
Miscellaneous mentions	2%	1%	2%	2%	1%	3%	2%	1%
Concern for public safety / Safety Information	1%	2%	0%	1%	2%	2%	2%	0%
Did not follow media/ Could not follow media due to power outage	1%	1%	1%	0%	2%	2%	1%	1%
Refused	0%	0%	0%	0%	0%	0%	1%	0%

Q6: What spokespeople do you recall speaking to the public about the power outages?
-Name-

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	400	231	169	175	223	54	165	178
Kathy Dunderdale	34%	33%	34%	35%	33%	34%	36%	31%
None / Nothing	26%	24%	29%	22%	30%	28%	20%	32%
Ed Martin	14%	17%	10%	20%	8%	8%	16%	15%
Don't Know / Unsure	11%	11%	12%	10%	13%	11%	11%	12%
Miscellaneous Mention	8%	9%	8%	8%	9%	11%	7%	9%
Can't remember name	8%	7%	8%	8%	7%	11%	5%	9%
Steve Kent	7%	10%	4%	12%	3%	9%	8%	5%
NL Power	6%	6%	6%	5%	7%	3%	9%	4%
Fred Hutton	5%	4%	7%	5%	5%	0%	7%	7%
Earl Ludlow	4%	6%	2%	5%	3%	5%	4%	5%
CEO (general)	4%	3%	5%	5%	3%	0%	7%	4%
NL Hydro	4%	3%	4%	3%	5%	4%	4%	3%
Dawn Daley (NL Hydro)	4%	5%	1%	6%	1%	5%	3%	2%
Nalcor	3%	2%	4%	4%	2%	4%	3%	2%
Politician / Government / Minister (general)	2%	2%	3%	0%	4%	6%	0%	2%
Dennis O'Keefe (Mayor of St. John's)	1%	2%	0%	2%	0%	4%	1%	1%
President (general)	1%	2%	1%	3%	0%	2%	2%	1%
Patty Daley / Open line	1%	1%	2%	2%	1%	2%	1%	1%
Michelle Coughlan	1%	1%	1%	1%	2%	0%	2%	1%
Radio (general)	1%	1%	0%	0%	2%	2%	2%	0%
Gary Smith	1%	1%	0%	1%	0%	0%	1%	1%
Vice President (general)	1%	1%	0%	2%	0%	0%	0%	2%
News / Newscasters	0%	0%	1%	1%	0%	0%	1%	0%
Lorraine Michaels	0%	0%	0%	0%	0%	0%	0%	1%

Q6: What spokespeople do you recall speaking to the public about the power outages?
-Organization-

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	400	231	169	175	223	54	165	178
Don't Know / Unsure	29%	29%	28%	25%	32%	29%	24%	36%
NL Power (Light and Power)	28%	30%	26%	30%	27%	20%	33%	29%
Government (general)	24%	26%	20%	27%	21%	20%	23%	28%
NL Hydro	18%	21%	14%	20%	15%	18%	20%	16%
Nalcor	16%	17%	14%	19%	12%	6%	18%	19%
VOCM	13%	11%	15%	12%	13%	13%	15%	10%
Premier (Kathy Dunderdale)	9%	9%	10%	9%	10%	10%	13%	5%
Government of NL	7%	7%	8%	7%	7%	9%	6%	7%
Miscellaneous Mention	6%	5%	7%	7%	5%	10%	5%	3%
NTV	3%	2%	3%	1%	4%	2%	5%	1%
CBC	2%	1%	3%	1%	2%	4%	2%	0%
Holyrood Operation Station	1%	1%	2%	2%	1%	3%	0%	2%
Open Line	1%	1%	1%	0%	2%	0%	1%	2%
Twitter	1%	1%	1%	1%	1%	2%	2%	0%

Q7: Do you recall seeing or hearing any of the following messages from Newfoundland Power during the power outages:

		Total	Region		Gender		Age		
			St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)		400	231	169	175	223	54	165	178
Information on where to report or get updates on outages	Yes	59%	63%	55%	55%	64%	69%	60%	52%
	No	35%	32%	39%	40%	30%	26%	33%	45%
	Don't know	5%	5%	6%	5%	6%	5%	7%	4%
Safety	Yes	47%	50%	42%	48%	45%	41%	44%	55%
	No	48%	44%	53%	47%	49%	53%	51%	39%
	Don't know	5%	6%	5%	5%	6%	5%	5%	6%
Conservation	Yes	85%	89%	78%	87%	82%	86%	87%	79%
	No	12%	7%	19%	11%	14%	10%	9%	17%
	Don't know	3%	4%	3%	3%	4%	4%	3%	3%
Concern and empathy for customers	Yes	52%	56%	47%	52%	53%	61%	51%	47%
	No	41%	38%	45%	42%	41%	36%	40%	46%
	Don't know	7%	6%	8%	7%	7%	3%	9%	6%

Q8a: What specific messages do you recall about safety from Newfoundland Power?
SUBSET: Those who recall seeing/hearing safety messages from NLP during the outages.

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	194	117	77	89	104	23	74	96
Danger of Carbon monoxide poisoning/ proper use of generator in well ventilated area	53%	55%	49%	52%	53%	54%	64%	40%
Danger of using propane or oil operated equipment (Lanterns, heaters, stoves…) inside your home.	36%	39%	30%	41%	31%	20%	42%	40%
Do not leave burning candles unattended	31%	30%	32%	30%	31%	20%	37%	31%
Danger of power surges/unplug appliances	18%	16%	22%	17%	18%	12%	24%	14%
Do not use BBQs inside your home	9%	10%	7%	7%	11%	4%	12%	9%
Don't know	9%	6%	13%	8%	10%	16%	2%	11%
Be careful around fallen or damaged Power lines	6%	9%	3%	8%	5%	4%	6%	9%
Be prepare for loss of power/have supplies, food and water /stay warm/ warm shelters	5%	6%	5%	5%	6%	15%	4%	1%
Safely of NL Power Crew Members	3%	1%	7%	6%	0%	0%	2%	6%
Fire Place/Chimney safety/burning proper materials wood	2%	2%	3%	2%	2%	4%	3%	0%
Concern for elderly/check on elderly family, friends or neighbors	2%	3%	0%	1%	2%	0%	2%	2%
Concern for public safely in general/asking people to stay inside	1%	2%	0%	2%	0%	4%	0%	0%
Did not specify	1%	0%	2%	0%	1%	0%	1%	1%

Q8b: What specific messages do you recall about conservation?SUBSET: Those who recall seeing/hearing conservation messages from NLP during the outages.

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	335	204	131	153	180	47	145	140
Reduce heat/turn off heat in unused rooms	34%	38%	29%	37%	32%	53%	26%	30%
Do not use dishwasher, dryer, washer/ Use only when it is not peak times	34%	36%	29%	29%	39%	28%	40%	30%
Unplug all unused and unnecessary electronics and appliances (microwave, computer, TV, chargers…)	28%	31%	24%	27%	29%	36%	28%	21%
Turn out lights in unused rooms/ Only turn on necessary lights	26%	28%	24%	25%	28%	25%	29%	24%
Turn on utilities slowly once power is restored/Conserve power during peak times/lower use of electricity in general	24%	21%	30%	27%	22%	18%	26%	28%
Turn off Christmas lights	16%	17%	14%	13%	18%	16%	14%	18%
Conserve hot water (showers, baths…)/turn off hot water boiler	11%	13%	9%	12%	11%	8%	11%	14%
Don't know	4%	4%	5%	5%	3%	10%	1%	4%
Miscellaneous mentions	1%	1%	0%	0%	2%	0%	1%	1%

Q9a: In your opinion, did Newfoundland Power do an excellent, good, fair or poor job keeping customers informed during the outages?

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	400	231	169	175	223	54	165	178
Excellent	17%	19%	14%	14%	19%	21%	20%	10%
Good	42%	42%	41%	42%	40%	36%	43%	43%
Fair	26%	27%	25%	24%	28%	28%	23%	28%
Poor	14%	10%	18%	19%	9%	11%	11%	18%
Don't know	2%	3%	2%	0%	4%	3%	2%	2%

Q9b: Why do you say that?

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	400	231	169	175	223	54	165	178
Kept us informed/good communication (power outages and restorations time, what they were doing to fix the problem)	49%	49%	49%	47%	52%	52%	53%	43%
Lack of communication/No factual information/Inaccurate information	23%	22%	23%	27%	19%	22%	23%	22%
NL Power crew working hard / they did what they could/ out of their control	16%	19%	11%	13%	17%	11%	11%	24%
No means of communication due to power outage / no access to technology (Facebook, smart phones, twitter)	9%	7%	11%	10%	8%	16%	7%	5%
Don't know	3%	3%	2%	2%	3%	0%	4%	3%
Was not following the media/No reason/was not affected	3%	3%	2%	2%	3%	5%	2%	1%
Should have not happened/unprepared/Equipment not maintained	1%	1%	2%	2%	1%	0%	1%	3%
Too long without power/ Long time before problem was resolved	1%	1%	2%	1%	1%	0%	2%	2%
Refused	1%	0%	2%	1%	0%	3%	0%	0%
Could not reach NL Power	1%	1%	0%	0%	1%	0%	1%	1%
Miscellaneous mentions	0%	0%	0%	1%	0%	0%	1%	1%

Q11b: How would you rate Newfoundland Power on the following measures?

		Total	Region		Gender		Age		
			St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)		400	231	169	175	223	54	165	178
Having up to date information available	poor 1	7%	6%	8%	9%	4%	7%	6%	7%
	2	3%	2%	4%	3%	3%	2%	3%	4%
	3	4%	2%	6%	5%	3%	6%	3%	3%
	4	6%	6%	5%	5%	7%	4%	5%	9%
	5	10%	11%	9%	11%	9%	8%	10%	12%
	6	8%	9%	7%	6%	10%	5%	10%	8%
	7	15%	18%	12%	16%	14%	15%	16%	14%
	8	21%	19%	24%	22%	21%	20%	23%	20%
	9	8%	9%	6%	8%	8%	9%	9%	6%
	excellent 10	14%	16%	13%	12%	17%	25%	12%	10%
	Don't Know	4%	3%	5%	3%	5%	0%	2%	8%
Providing information that was easy to understand	poor 1	4%	2%	5%	5%	2%	3%	4%	4%
	2	3%	1%	5%	3%	2%	3%	2%	3%
	3	3%	2%	3%	3%	2%	2%	3%	3%
	4	4%	4%	4%	4%	3%	3%	2%	6%
	5	8%	8%	8%	8%	8%	4%	7%	13%
	6	8%	10%	5%	6%	9%	7%	9%	6%
	7	16%	17%	14%	19%	13%	16%	16%	15%
	8	23%	25%	20%	22%	24%	21%	26%	21%
	9	10%	9%	10%	11%	9%	12%	10%	7%
	excellent 10	20%	20%	21%	15%	25%	24%	19%	18%
	Don't Know	3%	2%	4%	2%	4%	4%	1%	4%
Restoring power as fast as possible	poor 1	4%	4%	4%	4%	4%	3%	4%	4%
	2	1%	2%	0%	1%	1%	2%	1%	2%
	3	2%	2%	2%	2%	2%	2%	2%	2%
	4	2%	2%	3%	3%	2%	0%	3%	3%
	5	10%	11%	10%	13%	7%	7%	12%	9%
	6	9%	8%	9%	7%	10%	9%	8%	8%
	7	13%	15%	10%	13%	13%	11%	15%	12%
	8	22%	22%	21%	23%	20%	21%	19%	27%
	9	12%	14%	10%	12%	12%	12%	14%	10%
	excellent 10	21%	17%	26%	18%	24%	26%	20%	18%
	Don't Know	4%	4%	4%	4%	4%	8%	2%	4%
	Refused	0%	0%	0%	0%	0%	0%	0%	1%

Demonstrating leadership during the outages	poor 1	4%	4%	5%	5%	3%	3%	4%	6%
	2	1%	1%	2%	2%	1%	0%	1%	3%
	3	3%	4%	2%	3%	4%	3%	3%	4%
	4	6%	5%	8%	6%	6%	7%	5%	7%
	5	11%	12%	11%	12%	11%	12%	9%	14%
	6	9%	11%	7%	12%	7%	7%	11%	9%
	7	18%	20%	16%	20%	16%	17%	21%	15%
	8	20%	18%	22%	18%	21%	22%	20%	17%
	9	6%	5%	6%	5%	6%	5%	6%	6%
	excellent 10	15%	16%	14%	11%	19%	25%	13%	10%
	Don't Know	6%	4%	7%	6%	5%	0%	6%	10%
Overall handling of the situation	poor 1	4%	4%	5%	6%	3%	3%	5%	5%
	2	2%	1%	2%	2%	1%	0%	2%	2%
	3	4%	4%	3%	5%	2%	3%	3%	4%
	4	5%	6%	3%	5%	5%	3%	5%	7%
	5	11%	11%	11%	9%	13%	11%	10%	13%
	6	7%	8%	7%	9%	6%	11%	7%	6%
	7	18%	18%	17%	22%	14%	16%	21%	15%
	8	24%	26%	21%	24%	24%	24%	24%	25%
	9	7%	7%	6%	7%	7%	5%	6%	9%
	excellent 10	17%	14%	22%	12%	22%	24%	17%	13%
	Don't Know	1%	1%	1%	0%	1%	0%	1%	2%
	Refused	0%	0%	0%	0%	0%	0%	0%	1%

Q11b: How would you rate Newfoundland Power on the following measures?% 8 or higher

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Having up to date information available	45%	45%	45%	43%	47%	54%	45%	38%
Providing information that was easy to understand	55%	56%	53%	49%	60%	61%	56%	48%
Restoring power as fast as possible	57%	55%	60%	56%	58%	64%	54%	57%
Demonstrating leadership during the outages	43%	41%	46%	36%	49%	52%	42%	37%
Overall handling of the situation	48%	47%	50%	42%	54%	52%	48%	47%

Don't knows and Refusals have been excluded.

Q11b: How would you rate Newfoundland Power on the following measures?

		Total	Region		Gender		Age		
			St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Having up to date information available	N	381	224	157	169	210	54	161	164
	Mean	6.6	6.8	6.4	6.4	6.8	7.1	6.7	6.2
Providing information that was easy to understand	N	388	226	162	172	214	52	163	170
	Mean	7.2	7.4	7.0	6.9	7.5	7.6	7.3	6.9
Restoring power as fast as possible	N	384	220	164	166	216	50	161	170
	Mean	7.4	7.3	7.5	7.3	7.5	7.8	7.3	7.2
Demonstrating leadership during the outages	N	373	219	154	162	209	54	156	160
	Mean	6.8	6.8	6.8	6.5	7.1	7.3	6.9	6.3
Overall handling of the situation	N	393	229	164	173	218	54	163	173
	Mean	7.0	6.9	7.1	6.7	7.3	7.3	7.0	6.7

Q12a: What information source did you rely on most for information during the outages?
-First mention-

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	400	231	169	175	223	54	165	178
Radio	59%	60%	57%	63%	56%	33%	61%	78%
Facebook	8%	9%	7%	7%	9%	18%	8%	0%
The Newfoundland Power website	8%	6%	11%	4%	12%	20%	6%	1%
Twitter	5%	8%	1%	7%	3%	14%	4%	0%
Other sources (please specify)	5%	7%	2%	4%	5%	7%	4%	4%
Word of mouth/friends/relatives	4%	4%	5%	2%	6%	2%	4%	6%
Other social media (please specify)	3%	2%	5%	5%	2%	3%	5%	2%
The Newfoundland Power call centre	3%	0%	6%	3%	3%	2%	4%	3%
Television	3%	3%	3%	3%	3%	0%	4%	4%
Don't know	2%	1%	2%	2%	1%	2%	1%	2%

Q12a: What information source did you rely on most for information during the outages?
-Second mention-

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	393	229	164	173	219	53	164	174
None	34%	33%	37%	34%	35%	20%	29%	53%
The Newfoundland Power website	12%	15%	8%	13%	11%	16%	17%	3%
Radio	11%	13%	9%	10%	12%	13%	12%	10%
Television	10%	9%	11%	9%	11%	2%	12%	13%
Word of mouth/friends/relatives	10%	8%	12%	11%	9%	6%	10%	12%
Facebook	9%	8%	9%	7%	10%	16%	8%	3%
Other sources (please specify)	5%	5%	5%	5%	6%	14%	3%	2%
Twitter	4%	4%	5%	6%	3%	10%	4%	0%
Other social media (please specify)	2%	2%	3%	2%	2%	2%	3%	2%
Newspaper	1%	2%	0%	2%	0%	2%	1%	1%
The Newfoundland Power call centre	1%	1%	1%	1%	1%	0%	1%	2%

Q12a: What information source did you rely on most for information during the outages?
-Third mention-

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	241	148	93	108	132	42	116	81
None	58%	55%	61%	60%	55%	58%	52%	67%
Facebook	9%	6%	12%	5%	12%	17%	7%	1%
Television	8%	10%	5%	9%	7%	4%	10%	8%
Word of mouth/friends/relatives	7%	6%	8%	6%	8%	2%	7%	14%
Radio	6%	6%	5%	5%	7%	12%	4%	0%
The Newfoundland Power website	5%	7%	4%	4%	7%	5%	6%	5%
Other sources (please specify)	4%	5%	2%	5%	2%	2%	6%	1%
Other social media (please specify)	1%	2%	0%	2%	1%	0%	3%	0%
Don't know	1%	2%	0%	1%	1%	0%	1%	1%
Twitter	1%	1%	0%	1%	0%	0%	2%	0%
Newspaper	1%	1%	1%	1%	1%	0%	0%	3%
The Newfoundland Power call centre	1%	0%	2%	0%	1%	0%	1%	0%

Q12a: What information source did you rely on most for information during the outages?
-All mentions combined-

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	400	231	169	175	223	54	165	178
Radio	74%	77%	70%	76%	72%	55%	75%	88%
The Newfoundland Power website	25%	27%	22%	22%	28%	42%	29%	7%
Facebook	23%	23%	23%	18%	28%	49%	22%	3%
Word of mouth/friends/relatives	20%	18%	22%	18%	22%	9%	22%	26%
Television	19%	19%	20%	20%	18%	10%	24%	21%
Other sources (please specify)	14%	17%	9%	13%	14%	22%	14%	6%
Twitter	10%	13%	6%	14%	6%	24%	8%	0%
Other social media (please specify)	7%	5%	9%	9%	5%	4%	10%	4%
The Newfoundland Power call centre	4%	1%	8%	4%	5%	2%	6%	4%
Newspaper	2%	3%	1%	4%	1%	2%	2%	3%
Don't know	2%	1%	2%	2%	1%	2%	1%	2%

Q12b: Who did you follow on Twitter to stay informed?
SUBSET: Those who mentioned Twitter.

	Total	Region		Gender		Age	
		St John's CMA	Other Eastern	Male	Female	18-34	35-54
Total (n)	27	21	6	18	9	13	13
NF Power	69%	74%	55%	82%	42%	77%	60%
NL Hydro	46%	50%	33%	42%	55%	53%	36%
VOCM News	36%	40%	24%	39%	29%	37%	37%
Other (please specify)	30%	35%	16%	33%	23%	29%	34%
CBC News	30%	36%	12%	22%	47%	35%	21%
Friends and family	6%	4%	12%	0%	19%	0%	17%
NTV News	4%	5%	0%	3%	6%	0%	12%
Don't know	2%	3%	0%	3%	0%	0%	7%
Refused	3%	3%	0%	0%	8%	0%	0%

Q14: Did you report an outage to Newfoundland Power at any point during the first week of January?

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	400	231	169	175	223	54	165	178
Yes	11%	10%	13%	15%	8%	11%	13%	9%
No	89%	90%	87%	85%	91%	89%	87%	91%
Don't Know	0%	0%	0%	0%	0%	0%	0%	0%

Q15a: Which of the following methods did you use to report an outage?
SUBSET: Those who reported outages.

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	41	22	19	22	19	6	19	16
Newfoundland Power toll-free line	83%	67%	100%	81%	85%	70%	92%	80%
Newfoundland Power website	12%	23%	0%	13%	10%	30%	8%	0%
Other (please specify)	5%	10%	0%	5%	5%	0%	0%	20%

Q15b: Did you report the outage via the automated system or did you speak directly with a representative?
SUBSET: Those who reported outages by Newfoundland Power toll-free line.

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	34	15	19	17	17	4	17	13
Spoke directly with a representative	63%	73%	55%	62%	64%	100%	59%	38%
Automated system	40%	33%	45%	43%	36%	0%	46%	62%

Q16aa: Using a scale from 1 to 10 where 1 is poor and 10 is excellent, how would you rate-How easy it was to report the outage on the NF Power website-SUBSET: Those who reported outages using Newfoundland Power website.

	Total	Region	Gender		Age	
		St John's CMA	Male	Female	18-34	35-54
Total (n)	4	4	3	1	2	2
poor 1	17%	17%	24%	0%	0%	50%
7	17%	17%	24%	0%	0%	50%
excellent 10	67%	67%	52%	100%	100%	0%
% 8 or higher	67%	67%	52%	100%	100%	0%
Mean	8.0	8.0	7.1	10.0	10.0	4.0
N (valid responses)	4	4	3	1	2	2

Don't knows and Refusals have been excluded from '% 8 or higher' calculation.

Q16ab: Using a scale from 1 to 10 where 1 is poor and 10 is excellent, how would you rate-How easy it was to report the outage on the toll-free line
-SUBSET: Those who reported outages using Newfoundland Power website.

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	34	15	19	17	17	4	17	13
poor 1	10%	0%	17%	16%	0%	0%	14%	8%
2	5%	0%	8%	5%	4%	0%	6%	6%
3	9%	21%	0%	8%	10%	0%	13%	9%
4	2%	0%	4%	4%	0%	0%	0%	8%
5	14%	11%	16%	20%	4%	34%	5%	14%
7	9%	19%	3%	0%	24%	21%	6%	6%
8	3%	0%	5%	0%	8%	0%	6%	0%
9	4%	5%	3%	0%	10%	0%	0%	15%
excellent 10	42%	44%	41%	43%	40%	46%	49%	24%
Don't Know	2%	0%	4%	4%	0%	0%	0%	8%
% 8 or higher	50%	49%	51%	45%	58%	46%	55%	43%
Mean	6.8	7.3	6.5	6.2	7.8	7.7	6.8	6.2
N (valid responses)	33	15	18	16	17	4	17	12

Don't knows and Refusals have been excluded from '% 8 or higher' calculation.

Q16b: Why do you say that?
SUBSET: Those who rated NLP toll-free line as 6 or less.

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	14	6	8	10	4	1	7	6
Do not like automated system / would rather speak to a Rep	52%	35%	61%	52%	53%	100%	45%	33%
Took multiple calls/busy/hard to get though	35%	32%	36%	32%	47%	0%	38%	50%
On hold/wait time too long to reach a Rep	16%	46%	0%	14%	25%	0%	21%	17%
No use reporting did nothing/ no action taken	11%	0%	16%	13%	0%	0%	21%	0%

Q17a: Did you or anyone in your household practice any energy conservation measures during the power outages that you normally wouldn't have done?

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	400	231	169	175	223	54	165	178
Yes	87%	89%	85%	86%	88%	89%	88%	85%
No	12%	10%	14%	12%	11%	9%	11%	14%
Don't Know	1%	1%	1%	2%	0%	2%	1%	1%

Q17b: Why not?
SUBSET: Those who didn't practice any additional energy conservation measures during the power outages.

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	50	24	26	21	28	5	18	26
We did conserve/we always conserve	38%	40%	36%	45%	33%	28%	52%	33%
Didn't feel there was a need/it would not have made a difference/ not my problem/ Paying customer	18%	30%	7%	27%	11%	55%	9%	8%
Could not practice conservation due to no power	17%	4%	29%	4%	26%	0%	11%	26%
Don't know	15%	19%	13%	14%	17%	17%	11%	20%
Was away from home	4%	0%	8%	0%	8%	0%	11%	0%
due to medical or health reason/ emergency situation	4%	3%	5%	3%	5%	0%	7%	4%
Needed to heat home once power was restored	3%	3%	3%	7%	0%	0%	0%	8%

Q17c: What energy conservation measures did you and your family take?SUBSET: Those who practiced some energy conservation measures during the power outages that they normally don't do.

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	347	205	142	152	194	48	146	151
Turned off lights	74%	78%	69%	74%	74%	64%	80%	75%
Turned down the heat	47%	51%	42%	51%	44%	57%	43%	44%
Washed clothes/dishes in off peak times	47%	52%	39%	42%	50%	53%	50%	36%
Other (please specify)	46%	45%	48%	48%	44%	55%	44%	42%
Unplugged appliances/computer	27%	24%	31%	28%	27%	35%	28%	19%
Don't know	0%	0%	0%	0%	1%	0%	0%	1%

Q17d: Which, if any, of these energy conservation measures are you still practicing?
SUBSET: Those who named energy conservation measures they practiced during the power outages that they normally don't do.

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	345	204	141	152	192	48	146	149
Turned off lights	45%	49%	39%	40%	49%	36%	51%	45%
Turned down the heat	24%	25%	23%	26%	23%	31%	20%	24%
Neither/None (VOL)	19%	18%	22%	26%	13%	22%	21%	15%
Washed clothes/dishes in off peak times	16%	17%	15%	15%	17%	11%	20%	14%
Other	13%	12%	13%	13%	13%	13%	13%	13%
Don't know	11%	10%	11%	7%	14%	12%	5%	16%
Unplugged appliances/computer	6%	5%	8%	5%	7%	11%	6%	3%
Refused	1%	1%	1%	2%	0%	0%	2%	1%

Q18: To the best of your knowledge, is Newfoundland Power:

		Total	Region		Gender		Age		
			St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)		400	231	169	175	223	54	165	178
Responsible for the distribution of power homes in NL	Yes	87%	90%	83%	88%	86%	88%	86%	86%
	No	5%	5%	6%	8%	3%	6%	7%	3%
	Refused	0%	0%	1%	1%	0%	0%	1%	0%
	Don't Know	7%	5%	11%	3%	11%	6%	6%	10%
Responsible for the generation of power	Yes	47%	41%	53%	38%	55%	54%	39%	50%
	No	41%	46%	34%	53%	29%	33%	50%	36%
	Refused	0%	0%	1%	1%	0%	0%	1%	0%
	Don't Know	12%	13%	12%	8%	16%	12%	11%	14%

Q19: To the best of your knowledge, were the power outages in early January a:

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	400	231	169	175	223	54	165	178
Power generation issue	66%	64%	69%	73%	61%	78%	67%	58%
Power distribution issue	10%	10%	9%	9%	11%	3%	11%	13%
Both	15%	17%	13%	13%	18%	16%	15%	16%
Refused	0%	0%	1%	1%	0%	0%	1%	0%
Don't know	8%	8%	8%	4%	11%	3%	6%	13%

D3: And which of the following categories best corresponds to your annual household income before taxes and deductions?

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	400	231	169	175	223	54	165	178
Less than $60,000	29%	22%	40%	28%	31%	27%	14%	51%
$60,000 to $89,999	21%	22%	19%	20%	22%	22%	23%	18%
$90,000 to $119,999	16%	21%	9%	19%	13%	28%	16%	6%
$120,000 or more	21%	21%	21%	21%	20%	19%	32%	8%
Prefer not to say	13%	15%	11%	12%	14%	4%	15%	17%

D5: What is the main heating system in your home?

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	400	231	169	175	223	54	165	178
Electric baseboard	58%	66%	46%	56%	59%	68%	53%	56%
Forced air furnace	8%	7%	9%	8%	8%	7%	7%	11%
Hot water furnace	8%	9%	7%	9%	8%	0%	9%	15%
Heating stove	4%	2%	7%	4%	4%	6%	3%	4%
Ground source heat pump	1%	1%	2%	0%	2%	0%	2%	1%
Air source heat pump	6%	5%	8%	7%	5%	4%	10%	3%
Fireplace	0%	0%	0%	0%	0%	0%	1%	0%
Radiant panels	0%	1%	0%	0%	0%	0%	1%	1%
Other (Please Specify)	12%	8%	19%	14%	11%	13%	13%	10%
Prefer not to say (VOL)	1%	1%	1%	1%	2%	2%	2%	0%

D6: Which of the following best describes your home?

	Total	Region		Gender		Age		
		St John's CMA	Other Eastern	Male	Female	18-34	35-54	55+
Total (n)	400	231	169	175	223	54	165	178
Detached House - No Basement Apartment	74%	62%	89%	76%	72%	66%	81%	71%
Semi-Detached House, Townhouse or Row House (No Basement Apartment)	9%	14%	1%	10%	7%	17%	4%	7%
2-Apartment Home- Detached/Semi-Detached House with Apartment)	11%	15%	5%	10%	12%	10%	11%	12%
Downstairs Basement Apartment (in 2 Apartment Home)	1%	1%	0%	1%	1%	0%	1%	1%
Apartment in Apartment Building (Doesn't Include Basement Apartment)	2%	3%	0%	1%	2%	2%	1%	2%
Other (Please Specify - VOL)	3%	3%	3%	2%	4%	4%	0%	6%
Prefer not to say (VOL)	1%	1%	1%	1%	2%	2%	2%	0%

Reputation Management Survey
(May 2014)

Image Matters – Reputation Management Research

May 2014

Background and Methodology

- This research is based on a two-phase approach. The first phase included two focus groups held in early December 2013. The groups were designed to identify possible influencers of Newfoundland Power's reputation (IORs) and to generally provide depth and context of Newfoundland Power's reputation.
- Phase Two is reported in this presentation. It is a survey-based process designed to measure reputation.
- Based on discussions with the client, a separate exercise was undertaken to measure satisfaction.
- In addition to measuring, the analysis allows us to examine satisfaction and reputation to understand what "drives" both and what can be done to improve performance.
- A total of 500 interviews were completed with residential customers of Newfoundland Power.
- Data collection took place between April 21st and April 30th 2014.
- The overall margin of error is $\pm$ 4.5%.

Corporate Reputation: Marketplace Context

Introduction

Initially in the survey, respondents were asked to rate the overall reputation of 6 prominent organizations in Newfoundland and Labrador. Understanding the public environments these organizations operate in, and seeing their relative scores is meant to provide helpful marketplace context for the Newfoundland Power reputation story.

"How would you rate the overall reputation of ______ ? Please use a scale of 1 to 10 where 1 is poor and 10 is excellent."

5.7	6.2	6.5	6.5	7.1	7.4
[redacted]	newfoundland labrador hydro a nalcor energy company	[redacted]	NEWFOUNDLAND POWER A FORTIS COMPANY	[redacted]	[redacted]

NOTE: Scores are presented as mean scores of the 1-10 scale

Corporate Reputation: Marketplace Context

Score Composition

Mean scores can include wide ranges of individual responses; from very negative to very positive. Looking inside the numbers provides valuable insights into where your audience resides today.

1-4: Detractors

5-6: Neutrals

7-8: Supporters

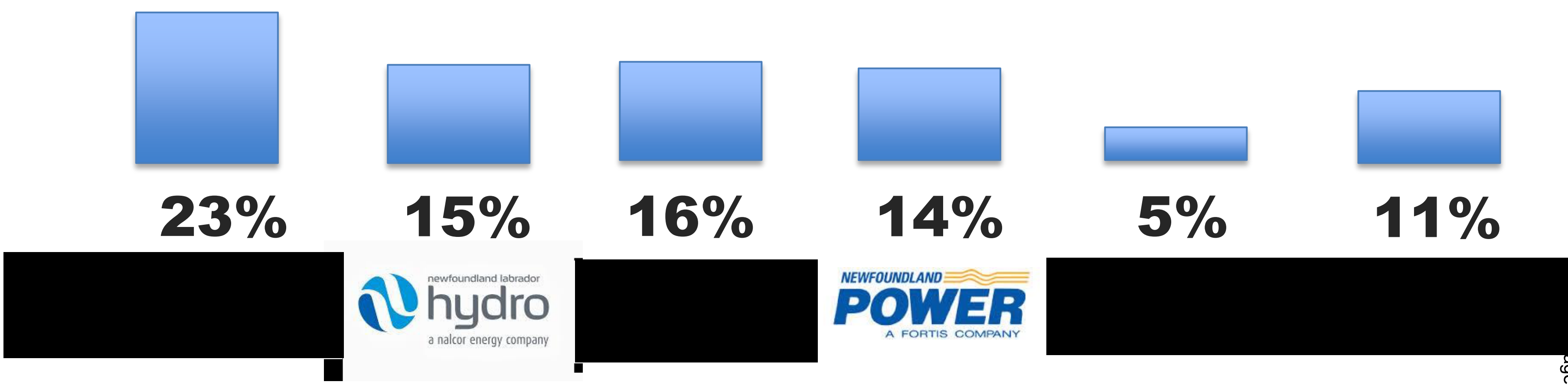
9-10: Champions

Corporate Reputation: Marketplace Context

1-4: The Detractors

Detractors typically include people who may:

- Have had one or more negative experiences that were not resolved to their satisfaction.
- Feel they are generally ignored, misunderstood or poorly serviced.
- Have had little direct experience, but know of someone else who has had a negative experience.
- Hear negative media coverage and are affected by it.



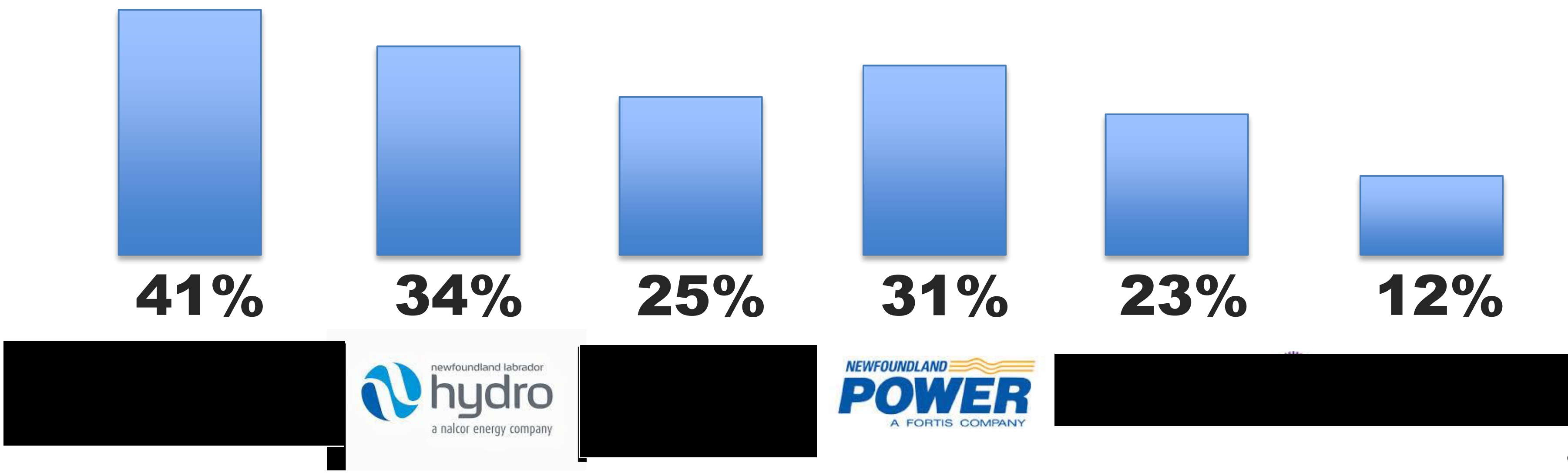
NOTE: Based on respondents who were familiar enough with the organization to provide a score

Corporate Reputation: Marketplace Context

5-6: The Neutrals

Neutrals typically include people who:

- Have limited engagement with an organization.
- Have had few (if any) experiences that have stood out positively or negatively.
- Are generally disinterested in the product or service.
- Don't pay much attention to media coverage (good or bad).



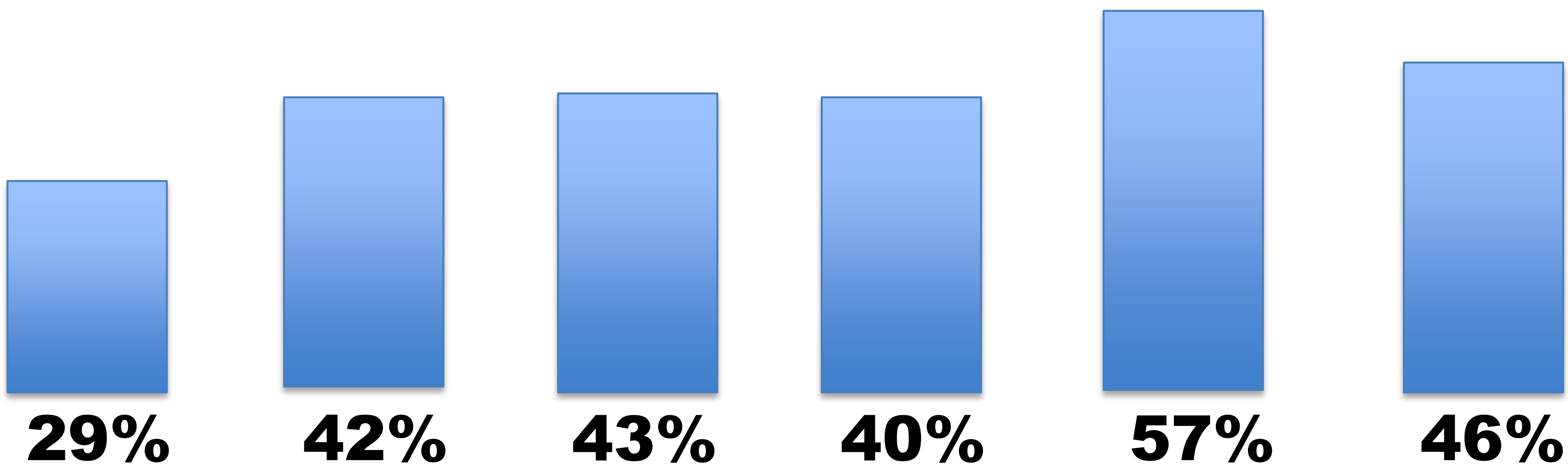
NOTE: Based on respondents who were familiar enough with the organization to provide a score

Corporate Reputation: Marketplace Context

7-8: The Supporters

Supporters typically include people who:

- Have had little or no issues with the organization (and if they did, the issue(s) were resolved well).
- Have had one or more positive experiences.
- Are generally pleased with the service they receive.
- Have heard good things about the organization (from friends and family or through media stories).



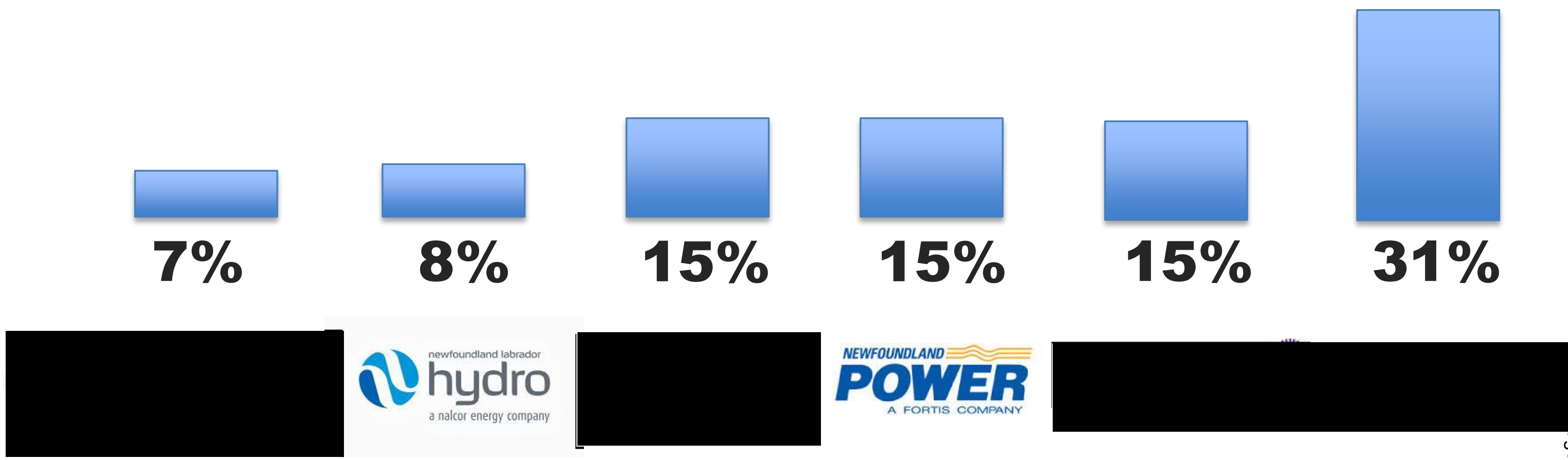
NOTE: Based on respondents who were familiar enough with the organization to provide a score

Corporate Reputation: Marketplace Context

9-10: The Champions

Champions typically include people who:

- Have had one or more exceptional experiences with an organization, that they often like to talk about.
- Feels the organization goes "above and beyond" in one or more areas.
- Have heard very positive stories about the organization: stories to which they can often relate.

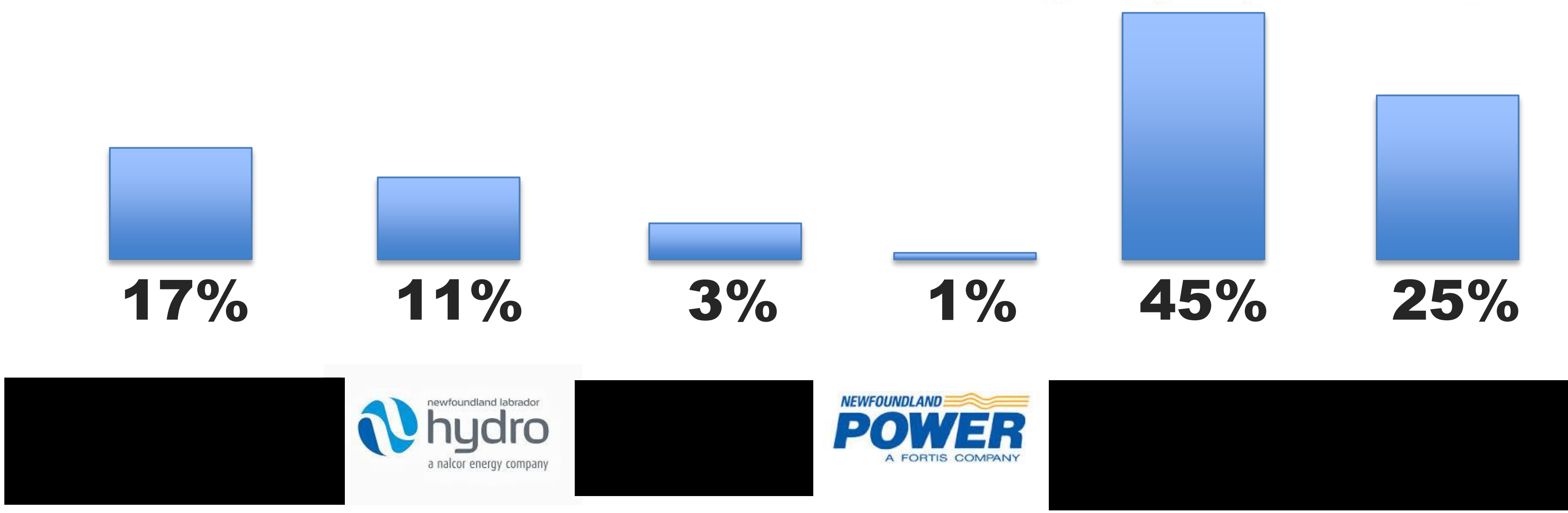


NOTE: Based on respondents who were familiar enough with the organization to provide a score

Corporate Reputation: Marketplace Context

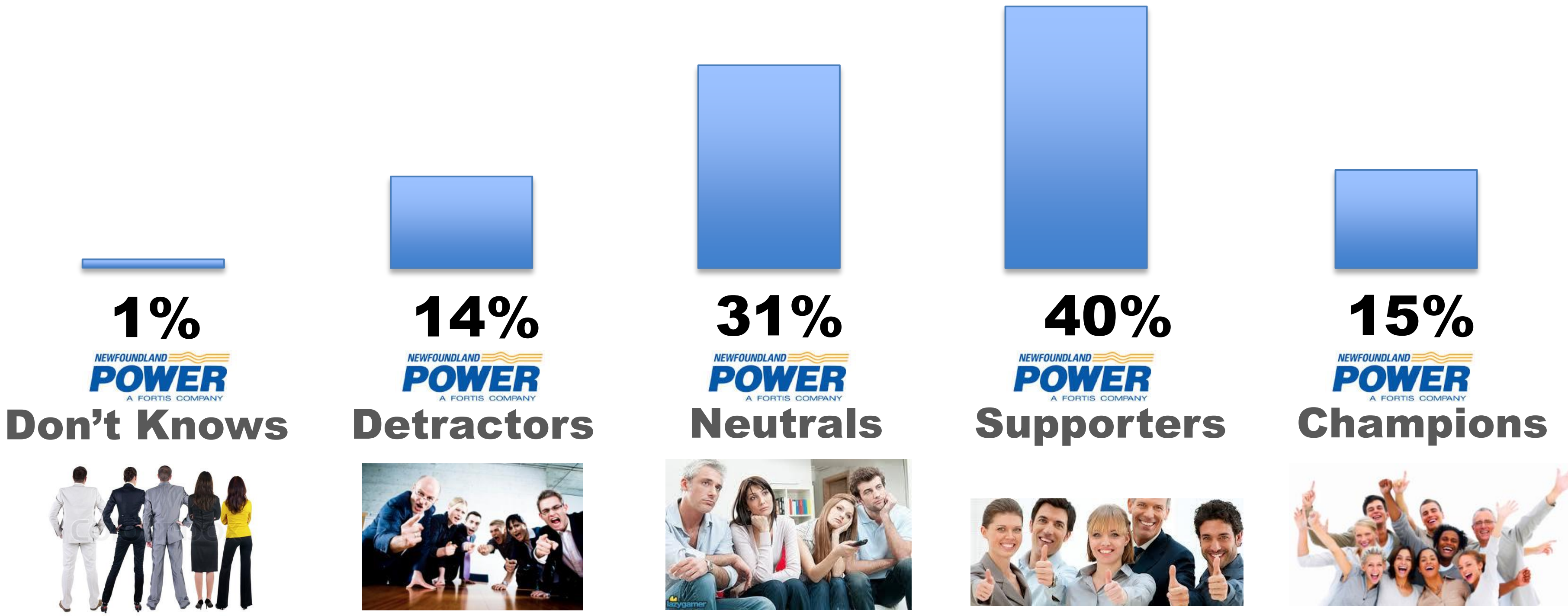
The "Don't Know" factor

Beyond the ratings provided, there is generally a group of people who don't know enough about a given organization to provide an opinion. People in this group may be irrelevant, indifferent, or may represent a real opportunity for reputation growth.



NOTE: Based on respondents who were familiar enough with the organization to provide a score

Corporate Reputation: The Unaided Newfoundland Power Picture

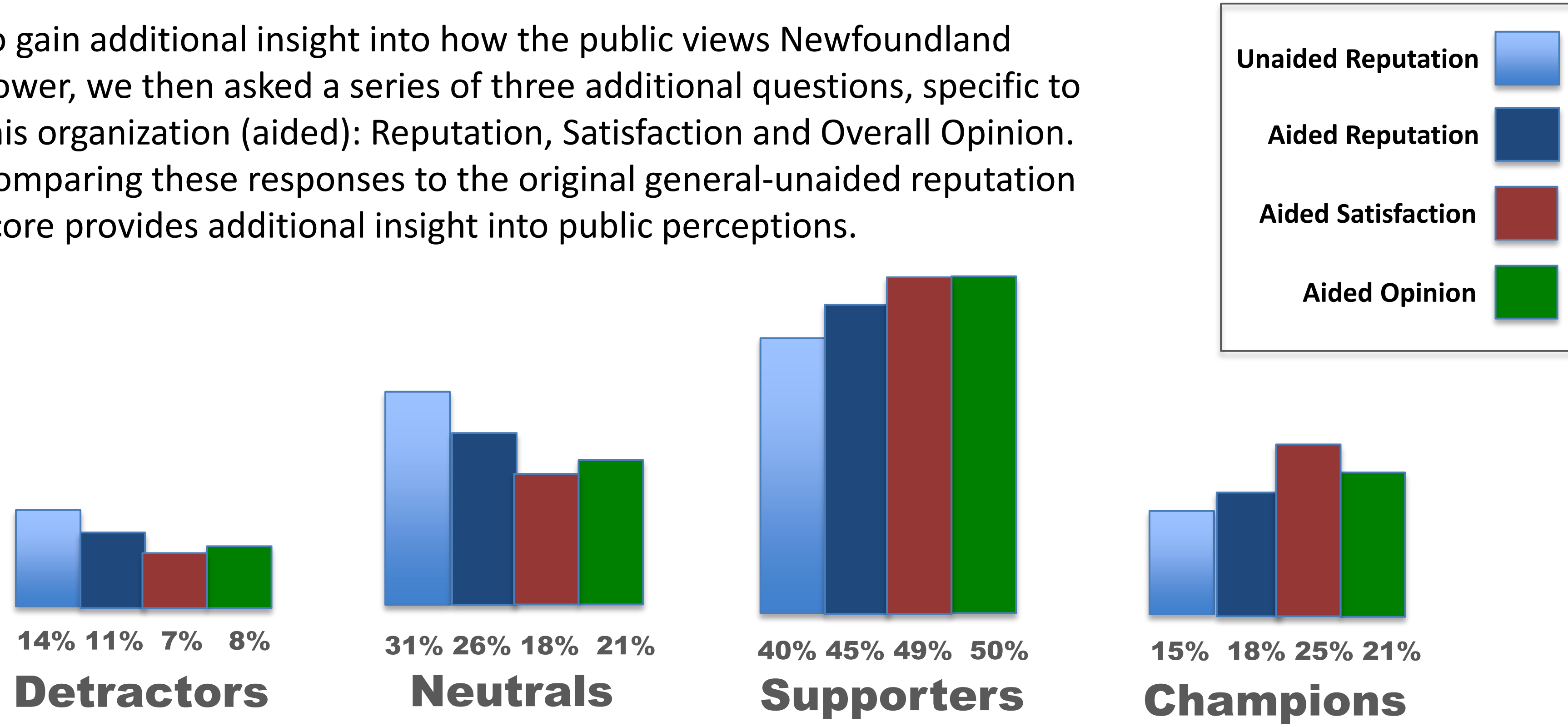


Key Insights

- ***Don't Knows:*** As a monopoly provider, Newfoundland Power has no room for growth in basic awareness. This is about moving people who already know us, although they may not know us well.
- ***Detractors:*** Many organizations will have 10-15% range. They think poorly of the organization, but as long as the segment is not large, they are not a major concern.
- ***Neutrals:*** This group represents a very significant portion of the NP customer base, and as a result, one that represents significant opportunity to engage.
- ***Supporters and Champions***: Given the low-engagement nature of day-to-day product delivery, the focus here may be moving 7's to 8's, and otherwise sustaining existing support.

Corporate Reputation: Looking Deeper into the NP Brand

To gain additional insight into how the public views Newfoundland Power, we then asked a series of three additional questions, specific to this organization (aided): Reputation, Satisfaction and Overall Opinion. Comparing these responses to the original general-unaided reputation score provides additional insight into public perceptions.



Key Highlights

- As people think more specifically about NP, their ratings generally increase, suggesting latent positive feelings about the organization.
- Satisfaction scores were generally higher than any others, suggestion that customer service is an important and very positive part of the organizations reputation.

Corporate Reputation: Understanding how to "Move the Needle"

Now that we've looked at the current environment and understand where the organization's reputation sits today, the question is: *"What can be done to strengthen your reputation going forward?"*

Why strengthen corporate reputation?

- Increases public confidence and trust when decisions have to be made.
- Strengthens the connection between you and your customer.
- Enables leadership to speak up with a stronger voice on public issues that matter to the organization and to the community.
- Increases corporate pride at all levels of the organization.
- Impacts your ability to attract the best and brightest to your team.

Corporate Reputation: Understanding how to "Move the Needle"

The following section presents the five step process that has been followed to identify the unique drivers of reputation for Newfoundland Power:

Step I: Identify the potential "Influencers of reputation" (IORs)

Step II: Collect and compare scores for all IORs

Step III: Condense IORs into Core Themes

Step IV: Present Newfoundland Power's Unique Drivers

Step V: Analyze the Drivers to inform a plan of action

Step I: Identifying the Influencers of Reputation for Newfoundland Power

Through the initial focus group process (Phase I of this project), and through further discussion with NP, a series of 33 potential influencers of reputation were developed. Following is the final list that was created and used throughout this study.

1. The quality and reliability of the electricity they provide
2. Being backed by solid technology and expertise
3. Ability to make good business decisions
4. Ability to efficiently manage their financial resources
5. Willingness to take responsibility for their actions
6. Willingness to publicly share information
7. Taking an active role in education about electricity and safety
8. Maintaining good relationships with employees
9. Offering fair wages and benefits to employees
10. Being involved in the community
11. Having a clear vision for the future
12. Having knowledgeable staff
13. Having a responsible attitude towards the environment
14. Having a focus on renewable energy
15. Being concerned about the safety of their employees
16. Providing excellent customer service
17. Creating Jobs in Newfoundland and Labrador
18. Donating to charities and community groups
19. Hiring people from the province whenever they can
20. Being concerned about the safety of the general public
21. Minimizing pollution from their operations
22. Providing good value for the price to its customers
23. Being concerned about the future of the communities it operates in
24. A company that I admire and respect
25. Being trustworthy
26. Being a company that cares about the public
27. Wisely using the money customers spend with them
28. Actively promoting ways to be energy efficient
29. Being a good employer
30. A place I would recommend as a good place to work
31. Always keeping the public informed through communications
32. Providing bills that are clear and easy to understand
33. Providing convenient methods of payment

Step II: Collect and Compare Scores for all IORs

All respondents were asked to rate Newfoundland Power on a scale of 1-10 for each of these IORs. For the purpose of focusing on notable performance, the highest 10 and lowest 10 are highlighted.

NOTE: Not everyone is typically able to provide a score for every measure. The actual response rates are indicators of the levels of familiarity with each of these NP topics across the province.

10 Highest Scores

Influencer of Reputation	Essence	Mean	Familiarity
1. Providing convenient methods of payment	Convenient payment	8.5	96%
2. Being concerned about the safety of the general public	Public Safety	8.4	94%
3. Being concerned about the safety of their employees	Employee Safety	8.4	80%
4. Providing bills that are clear and easy to understand	Clear Bills	8.1	96%
5. Offering fair wages and benefits to employees	Fair Wages	8.1	**41%**
6. Hiring people from the province whenever they can	Local Hiring	8.0	**58%**
7. Maintaining good relationships with employees	Employee Relations	7.9	**39%**
8. A place I would recommend as a good place to work	Good Place to Work	7.8	**51%**
9. Taking an active role in education about electricity and safety	Public Education	7.8	90%
10. Donating to charities and community groups	Donations	7.8	**60%**

Step II: Collect and Compare Scores for all IORs

10 Lowest Scores

Influencer of Reputation	Essence	Mean	Familiarity
1. Providing good value for the price to its customers	Providing value	6.1	94%
2. Wisely using the money customers spend with them	Wise Spending	6.2	66%
3. Willingness to publicly share information	Transparency	6.6	90%
4. A company that I admire and respect	Admired/Respected	6.7	96%
5. Willingness to take responsibility for their actions	Accountable	6.8	89%
6. Ability to efficiently manage their financial resources	Financial Mgt.	6.8	65%
7. Ability to make good business decisions	Decision making	6.8	68%
8. Being trustworthy	Trustworthy	6.9	93%
9. Having a clear vision for the future	Visionary	6.9	73%
10. Being concerned about the future of communities it operates in	Local Concern	7.0	77%

Step III: Condense IORs into Core Themes

- Through statistical analysis and logical deduction a "factor analysis," grouped the 33 IORs into a series of "Core Themes."
- Each of these themes may contain one or more IORs based on the common threads that are apparent between respondents' answers.
- The resulting 15 Themes (in this case) are then used to determine Newfoundland Power's unique Drivers of Reputation in Step IV.

Note: Themes that predominantly included "10 Highest Scored" IORs are highlighted in Green. Themes that predominantly included "10 Lowest Scored" are highlighted in Red.

Core Themes	33 Influencers of Reputation
Admiration/Respect	A company that I admire and respect
Customer Support	Having knowledgeable staff Providing excellent customer service
Employee Relations	Maintaining good relationships with employees Offering fair wages and benefits to employees Being a good employer
Accountability	Willingness to take responsibility for their actions Willingness to publicly share information Always keeping the public informed through communications Being trustworthy
Business Management	Ability to make good business decisions Ability to efficiently manage their financial resources Wisely using the money customers spend with them
Product Delivery	The quality and reliability of the electricity they provide Providing good value for the price to its customers
Convenient Payment	Providing convenient methods of payment
Public Education	Taking an active role in education about electricity and safety Actively promoting ways to be energy efficient
Vision	Having a clear vision for the future Having a focus on renewable energy Being concerned about the future of the communities it operates in
Community	Being involved in the community Donating to charities and community groups Being a company that cares about the public
Safety	Being concerned about the safety of their employees Being concerned about the safety of the general public
Environment	Having a responsible attitude towards the environment Minimizing pollution from their operations
Commitment to Province	Creating Jobs in Newfoundland and Labrador Hiring people from the province whenever they can
Expertise	Being backed by solid technology and expertise
Clear Billing	Providing bills that are clear and easy to understand

Step IV: Newfoundland Powers' Unique Drivers of Reputation

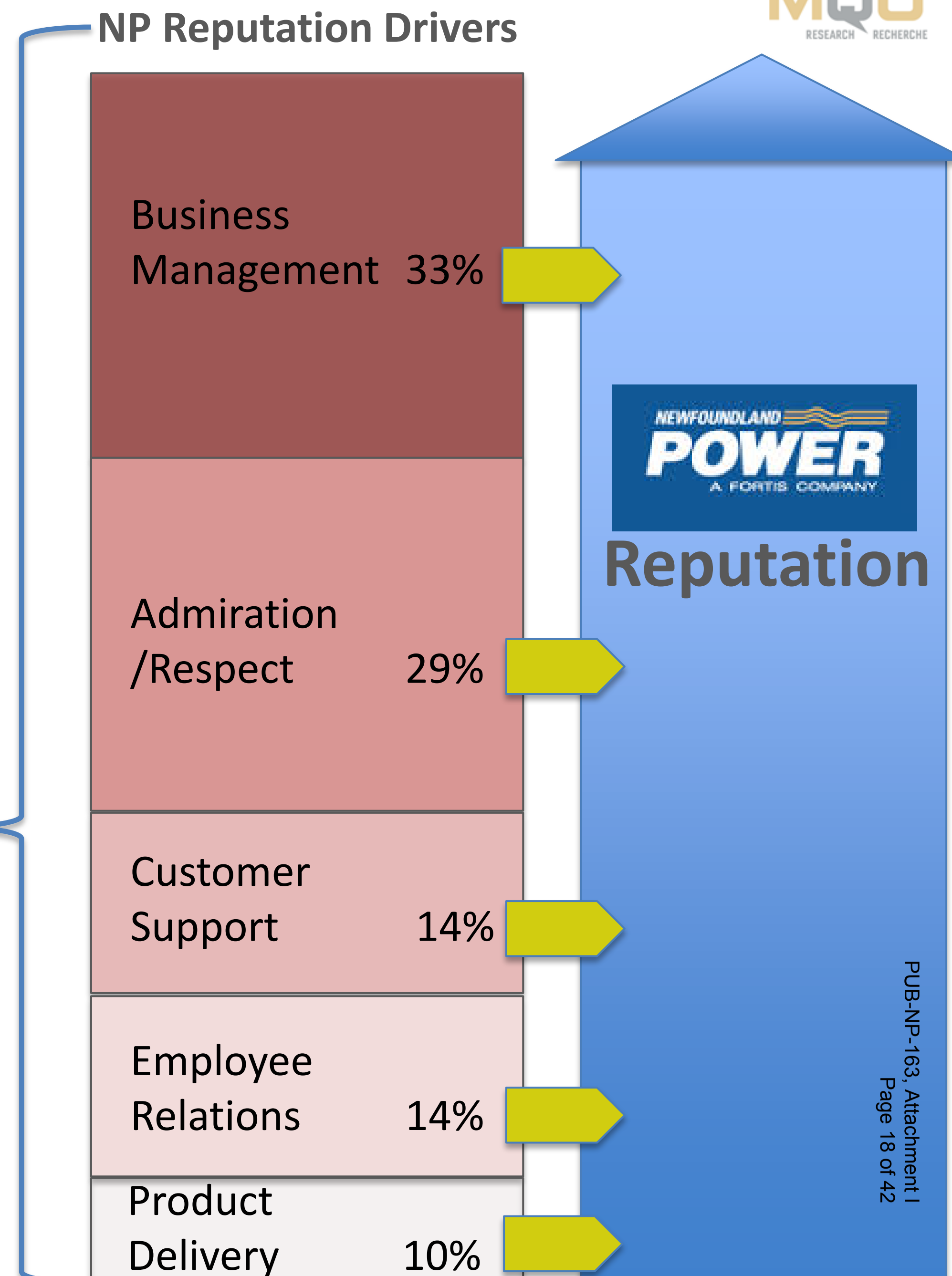
Using advanced statistical analysis on the Core Themes, the key drivers of reputation and their relative impact on your reputation was identified.

The percentages represent the relative influence of each driver.

There are 5 key drivers of reputation for Newfoundland Power - two strong drivers (Business Management & Admiration and Respect) and three medium drivers (Customer Support, Employee Relations and Product Delivery).

Based on the outcome of this analysis we can confidently predict that improving the organizations "performance" on these "Drivers" will have a positive impact on Newfoundland Powers reputation in the Newfoundland and Labrador Marketplace.

NOTE: R^2 = .64 (an R^2 score above .6 indicates a strong correlation between drivers and reputation)

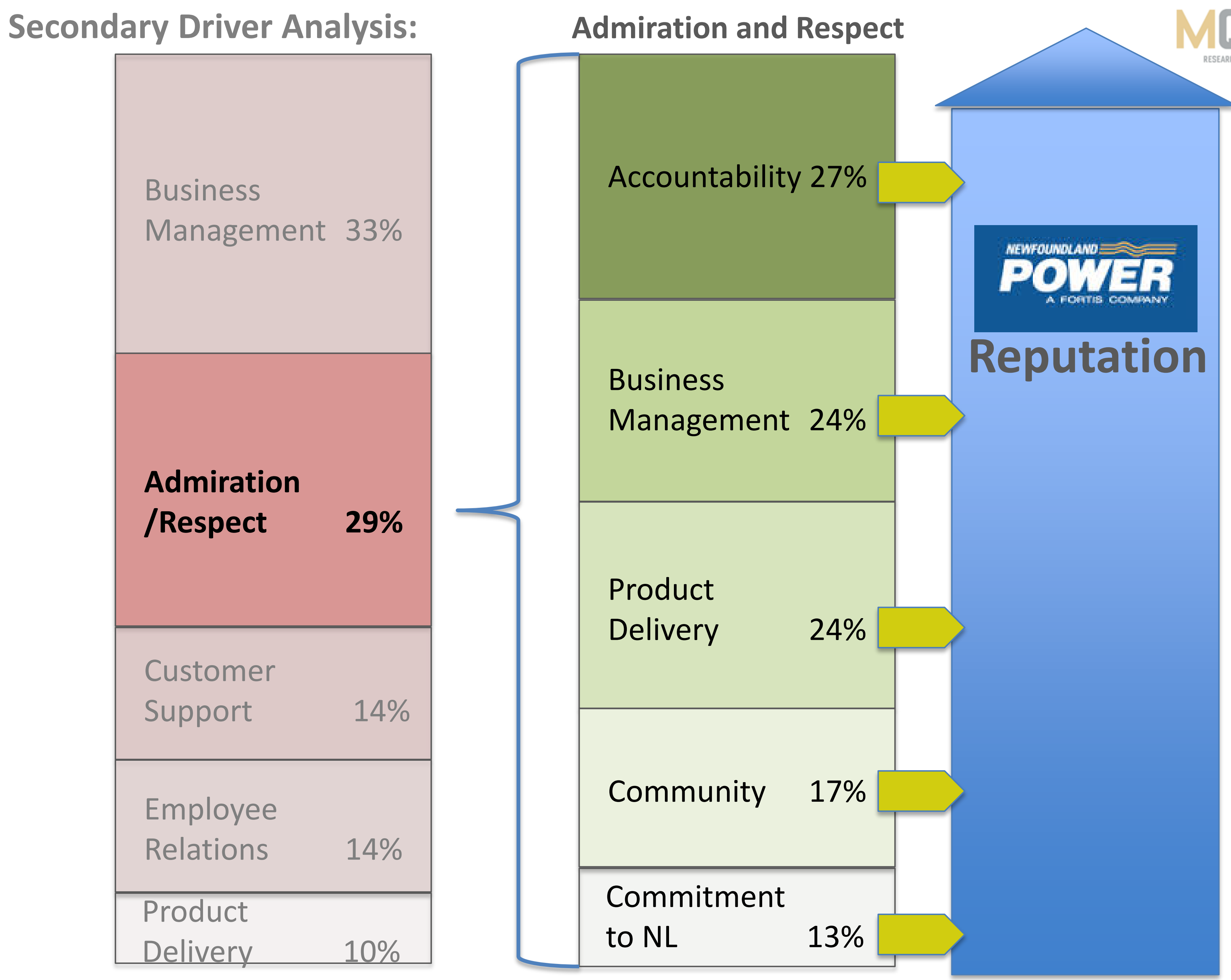


Admiration and Respect: Demystifying a Key Driver

Within the unique Reputation Drivers for Newfoundland Power, one stood out in that it was very significant within the group (29%), yet reflected only one statement:

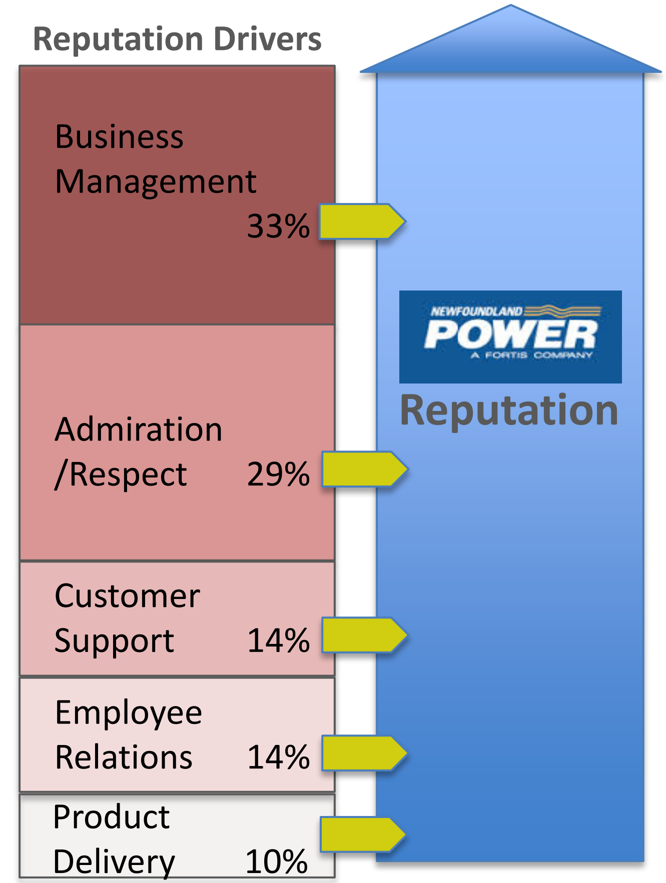
"A company that I admire and respect"

To provide additional insight to what constitutes an "admiration and respect" score, we ran an additional driver analysis exclusively for this driver. The result was both very representative (R^2 value of .78) and enlightening.


Secondary Driver Analysis:
Admiration and Respect
Business Management 33%
Admiration /Respect 29%
Customer Support 14%
Employee Relations 14%
Product Delivery 10%
Accountability 27%
Business Management 24%
Product Delivery 24%
Community 17%
Commitment to NL 13%
NEWFOUNDLAND POWER
A FORTIS COMPANY
Reputation

Additional Insight:
How do “Drivers of Reputation” work?

- The Drivers of Reputation are the identified “influencers” of Newfoundland Power’s reputation. Making changes that result in NP being seen in a more positive light in each of these areas will positively impact Newfoundland Powers reputation in the marketplace.
- Drivers of reputation are considered “variable” in that they reflect the current public environment. As perceptions change over time, or as other factors come into play, the Drivers may also change. However the goal is always consistent: Positively impacting todays drivers of reputation will positively impact the organization’s reputation.
- The stronger the Driver (see % in each box), the greater the impact (of your efforts) on your public reputation.
- Drivers identify areas of concern but not cause. For example, a low score on “Ability to make good business decisions” may require a focus on making better decisions or simply doing a better job of demonstrating that good decisions are being made.



Drivers versus Core Services.

As you can see in this model, there can be many aspects of Newfoundland Power’s work that don’t surface as Drivers of Reputation. This does not mean they are not important (or even critical) to the organization’s success. It simply means that working to improve them in the eyes of the public will not necessarily impact the organization’s reputation score.

Conversely, if one area slips in the future, it could become a future Driver of Reputation.

Step V: Analyze/Plan of Action - Reputation

Once the Drivers of Reputation have been identified, they are then deconstructed back to their component parts (see chart). This provides critical focus and clarity as it highlights current performance scores (along with an indication of how many people are familiar with your efforts in each area).

This clarity should then be used to inform your reputation management planning process.

	Mean Score	
	Reputation	Familiarity %
Business Management Driver weight: 33%		
Ability to make good business decisions	6.8	68%
Ability to efficiently manage their financial resources	6.8	65%
Wisely using the money customers spend with them	6.2	66%
Admiration/Respect Driver weight: 29%		
A company that I admire and respect	6.7	96%
Customer Support Driver weight: 14%		
Having knowledgeable staff	7.8	77%
Providing excellent customer service	7.2	98%
Employee Relations Driver weight: 14%		
Maintaining good relationships with employees	7.9	39%
Offering fair wages and benefits to employees	8.1	41%
Being a good employer	7.7	49%
Product Delivery Driver weight: 10%		
The quality and reliability of the electricity they provide	7.1	97%
Providing good value for the price to its customers	6.1	93%

- Greater priority should be placed on the drivers that make the largest contribution to overall reputation.
- Weaker scores indicate opportunities to strengthen perceptions.
- Stronger scores indicate areas that are important to retain support.
- "Low familiarity" scores indicate opportunities to increase awareness of capabilities and/or performance.
- The inherent challenge in planning is to distinguish between perceived areas of weakness, and areas where performance can actually be improved.

Excellent	Good	Fair	Poor
8.0 + or 80%	7.0 – 7.9 70%-79%	6.0 – 6.9 60%-69%	Less than 6.0 Less 60%

Identifying the Drivers of **Satisfaction** for Newfoundland Power

Understanding the importance of customer satisfaction for Newfoundland Power, MQO conducted and additional regression analysis to provide insight in this area.

By asking an additional question on respondents overall satisfaction with Newfoundland Power, we were then able to analyze the data to determine the Drivers of Satisfaction for the organization.

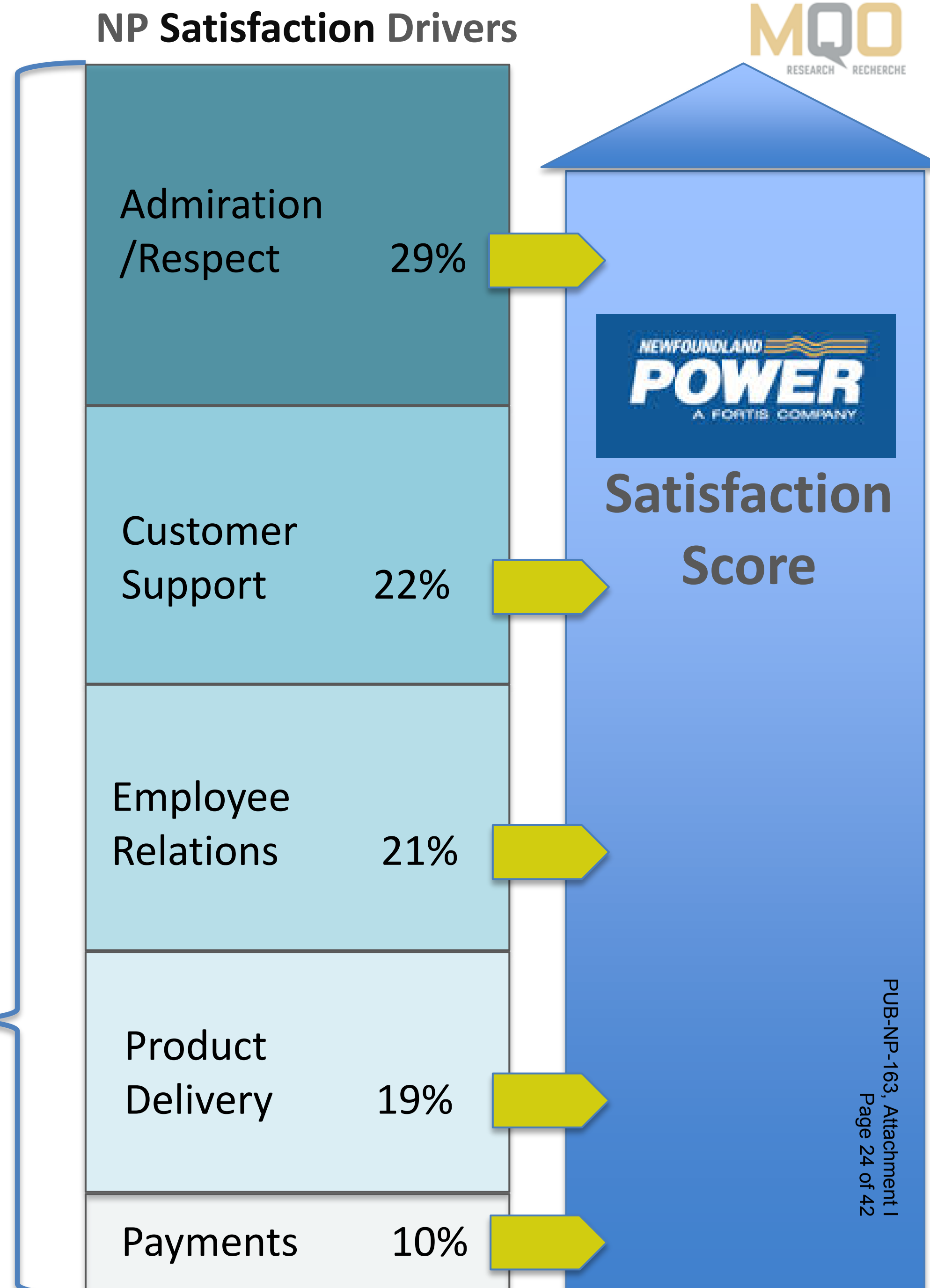
Note that this follows the same five-step process used for Reputation and that Steps, I, II and III are the same so only the last two steps are presented.

Step IV: Identifying the Drivers of Satisfaction for Newfoundland Power

Improving Satisfaction Scores
Each quarter NP collects and analyzes satisfaction levels of the general public (including people who have had a specific transaction). While the transactional results provides direction for making improvements in service, responses from the general public provide little specific direction to act upon. This Driver analysis can begin to fill the gap by providing the direction necessary to positively impact general satisfaction levels with the organization.

Based on the outcome of this analysis we can confidently predict that improving the organization's "performance" on these "Satisfaction Drivers" will have a positive impact on Newfoundland Power's satisfaction levels in the Newfoundland and Labrador Marketplace.

NOTE: R^2 = .6 (an R^2 score above .6 indicates a strong correlation between drivers and satisfaction)



Step V: Analyze/Plan of Action - Satisfaction

- Most of the drivers of satisfaction are the same as the ones influencing reputation – they tend to have more impact on satisfaction.
  - Note that the specific actions taken may differ depending on whether you are trying to influence reputation or satisfaction.
- The good news is that efforts to improve satisfaction will improve reputation and vice versa.
- Providing convenient methods of payment is the one driver of satisfaction that is not a driver of reputation. Your scores here are very good indicating there is little to be gained by increasing efforts in this area.

	Mean Score Satisfaction	Familiarity %
Admiration/Respect Driver weight: 28%		
A company that I admire and respect	6.7	96%
Customer Support Driver weight: 22%		
Having knowledgeable staff	7.8	77%
Providing excellent customer service	7.2	98%
Employee Relations Driver weight: 21%		
Maintaining good relationships with employees	7.9	39%
Offering fair wages and benefits to employees	8.1	41%
Being a good employer	7.7	49%
Product Delivery Driver weight: 19%		
The quality and reliability of the electricity they provide	7.1	97%
Providing good value for the price to its customers	6.1	93%
Payments Driver weight: 10%		
Providing Convenient Methods of Payment	8.5	96%

Excellent	Good	Fair	Poor
8.0 + or 80%	7.0 – 7.9 70%-79%	6.0 – 6.9 60%-69%	Less than 6.0 Less 60%

A Specific Corporate Activity

Questions on Newfoundland Power’s *Power of Life* campaign were included in the survey. These are summarized on the following slide.

Newfoundland Power's Power Of Life Project

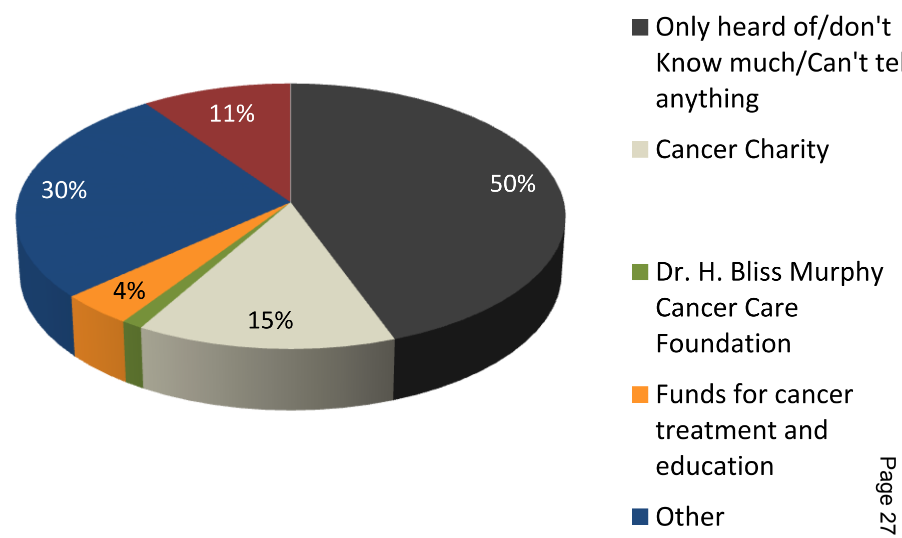
Within the context of this public survey, MQO was asked to investigate familiarity and understanding of the organizations ongoing "Power of Life" project.

Before today, have you heard of Newfoundland Powers Power of Life Project?

Yes	**29%**
No	**68%**
DK	**3%**

Observation: The Power of Life Project currently suffers from a lack of public awareness, and further to that, suffers from a lack of understanding from those who have heard of it.

What can you tell me about the Power of Life Project?



NEWFOUNDLAND POWER
A FORTIS COMPANY

Image Matters – Reputation Management Research

May 2014

MQO RESEARCH RECHERCHE

Newfoundland Power Reputation Research
Focus Groups Summary Report
December 2013

Introduction

This summary is based on two focus groups conducted for Newfoundland Power. The groups were designed to help us identify the main influencers of corporate reputation in a Newfoundland and Labrador context. The focus groups are phase one of a two-phase process.

The sessions were primarily designed to guide the questionnaire development for the second phase of Newfoundland Power's reputation research. Essentially we wanted to ensure that we included all relevant topics. In addition, time was spent discussing familiarity with Newfoundland Power and Newfoundland and Labrador Hydro and understanding of the differences between the two as well as the role of PUB. Finally, a short time was spent discussing the expected impact of the development of Muskrat Falls on Newfoundland Power.

Phase two of this research is a survey that will allow us to identify which of these possible influencers of reputation most influence the reputation of Newfoundland Power and your key performance on these main influencers.

Methodology

One session was conducted in St. John's on December 4th and the second session was held in Carbonear on the following evening. Recruiting was done without identifying Newfoundland Power and without revealing that the topic would involve electricity because we wanted participants to think broadly about corporate reputations. Participants were screened to:

- Be between 30 and 65.
- Had lived in their respective communities for at least two years.
- Regularly read a newspaper or watched the news (so they would be well-informed).
- Their occupation was asked so that anyone with a clear connection to Newfoundland Power could be identified.

Influencers of Reputation

The sessions were very useful in identifying the influencers of reputation (IOR's) that would apply to any major employer in the province. Without identifying the specific company being considered, participants helped to develop a complete list of these influencers and they are summarized below. When the survey is designed, the goal is to be as comprehensive as we can be and include as many of the influencers as possible. The subsequent analysis of the survey results will allow us to identify the ones that are having the most influence and those that are having little or none in terms of your corporate reputation.

- **Core product or service**: no matter which company is being considered, their core service or product has to do what it is supposed to do and if it doesn't, there needs to be an easy return or repair option.

- **Employees and how they are treated**: aspects of how employees are treated and their subsequent treatment of customers were mentioned frequently in both groups. Included were:
    - Concern for well-being of employees – safety.
    - Family-friendly policies.
    - Pensions and benefits.
    - Diversity in the workplace.
    - Well trained employees (knowledgeable/know what they are doing).
    - Longevity of employees – gives the impression that people are happy if they are there for a number of years.
- **How the company acts/business practices**: This included admitting mistakes that are made and rectifying them (or more than rectifying them in the sense of making up for them) and supporting local businesses in the sense of buying from them.
- **Environment:** Actively reducing waste; even turning off lights in areas that are not in use.
- **Communication**: A level of professionalism (the quality of advertising as an example) as well as honesty and integrity. An interesting negative example noted in the group is when Walmart takes donations from shoppers and then donates them to a charity (seemingly) as if Walmart is donating the money.
- **Community:** There is an expectation that all businesses, but particularly larger ones will support the community and be visible in it. This ranged from supporting charities, to sponsoring teams and even having a float in a Santa Claus parade in a smaller community like Carbonear. What was actually done did not seem to be as important as actually doing something.

It was not obvious to participants that the focus groups were for Newfoundland Power until close to the end, but throughout, Newfoundland Power, Bell Aliant, North Atlantic (Carbonear) and Dominion were discussed.

There was some debate on this, but because Newfoundland Power is one of the few (perhaps only) companies people deal with that has a monopoly, many had an even higher expectation of the need to support the community. The other main area of differentiation came because of the essential nature of the product/electricity provided. There is an even higher expectation that the "core service" be done exceptionally well. As was said, "I can live without my cable for a few hours, but not my power."

Perception of Newfoundland Power

In addition to a general discussion of influencers that would apply to any large company operating in the province, there was also specific discussion of several companies including Newfoundland Power to see if there are any additional influencers that apply. This discussion was also helpful in providing some preliminary feedback on Newfoundland Power.

Participants were first asked to give an overall rating of Newfoundland Power and two other companies on a scale of 1 – 10. Please note that this is not meant to be a precise exercise in any way, it is just a way to get an initial reaction and the numbers should not be considered in any way other than a directional indication. That said, Newfoundland Power was rated in the 8 – 9 range in both groups and is clearly well regarded.

Newfoundland Power was given high marks for how their employees are treated and their general service. The company is particularly well-regarded for the efforts during storms. There was some debate over the level of community involvement with some feeling Newfoundland Power was making considerable effort in this area and others struggling to name any initiatives. Suffice to say that nobody in the sessions had a strong grasp of the extent of the effort in this area from Newfoundland Power so this could certainly be communicated better. A few commented positively on Newfoundland Power's efforts to help customers save money through greater energy efficiency.

Simply because the company is a monopoly, several people said there is a tendency to be a little harsher with their evaluations. The fact the company is regulated by the PUB helped in this regard because the PUB is seen as being on the side of the customer and a way to "keep them honest."

Looking Inside the Conversation

As we work to understand people's relationships with, and perceptions of various organizations, the things participants don't say can be as important as the comments they make. In the case of Newfoundland Power, the relative hesitation in answering many of the specific Newfoundland Power questions, the lack of depth in many responses, and the sometimes limited consensus (when comments were made), all point to an organization that is not "top of mind" and one that generally travels "under the radar". Considering Newfoundland Power has more customers and generates more revenue from them than virtually any other organization in the province, this is quite significant.

Universally the one topic that generated lively response and discussion was around "power outages". In reflection it appears that this may be one of the most "defining" experiences for many customers: As they judge how well the outage is communicated, how accurately Newfoundland Power predicted the outage's duration and how quickly the power actually comes back on. How it happened, why it happened and who's at fault seem to all be less relevant "in the moment."

Aside from this one dominant topic (that surfaces only a few times each year for most householders), there were comparably lower levels of contribution in many areas. This means that the public does not spend a lot of time thinking about Newfoundland Power or interacting with the organization. The areas with lower levels of contribution/discussion included:

- Energy conservation: Very few people referenced Newfoundland Power's rebate program, or their efforts in this area (on an unaided basis).
- Concern for public safety around electricity: Despite Newfoundland Power's significant efforts, including multiple media campaigns on this topic, there was little to no reference to it by participants.
- Pricing: Very few participants had major concerns around electricity pricing. In fact, when brought up, most people took pricing in stride and did not react in any particularly negative manner even though, naturally, people would like to spend a little less.

- Community engagement: Participants cited major efforts by organizations like Walmart and McDonald's, but struggled to identify major efforts by Newfoundland Power. In particular, very few people referenced Newfoundland Power's major public fundraising efforts with "The Power of Life" campaign.

Considering this analysis is part one of a larger image assessment project, these insights are meant to provide a preliminary look at the public face of Newfoundland Power (through the eyes of typical consumers). As we move through the quantitative process and identify Newfoundland Power's unique "drivers of reputation," these initial insights will aid in understanding what can be accomplished in terms of future brand building, and the kinds of barriers that may impact your progress in this area.

In the following pages, we also provide commentary and insights around specific topic areas as requested by Newfoundland Power:

- Peoples understanding of the roles and relationship between Newfoundland Power and NL Hydro.
- Awareness/understanding of and the impact of the PUB on Newfoundland Power.
- Any perceptions of current/future impact of the Muskrat Falls project on Newfoundland Power.

Newfoundland Power & Hydro

Participants' basic understanding of the main "players" in the generating and delivery of electricity and their respective roles was accurate. Succinctly, most knew that Hydro generates the electricity and Newfoundland Power distributes it (in most areas of the province). They also had a basic idea of different ownerships between the two companies. Newfoundland Power is considered a "middle man" between the producer and the customer.

However, it is probably also fair to say that while they know that, they really don't think about it or don't care and tend to confuse the two. For example, in one session, Newfoundland Power was considered the company that was generating power and pollution at the Holyrood Generating Station.

Two scenarios were discussed in both sessions. The first was a loss of power during a winter storm and the second was a loss of power during a perfect summer evening. Reaction in both cases was the same; first people would call Newfoundland Power to let them know about the outage (after waiting a short time where they assumed others would let them know) and then they wanted a reasonable estimate of how long the power would be off. There was a little less urgency in the summer example, but the approach was the same and in neither case did Newfoundland and Labrador Hydro enter the picture. The following comments capture the sentiment of both groups.

"They (Power) are the intermediary and I have contact with them."
"I am their (Power's) customer."
"The problem is that none of us deal with Hydro and wouldn't know how to."
"Newfoundland Power did take on that responsibility (of dealing with Hydro)."

If the issue is one of generation rather than distribution, it is perfectly acceptable that customers are informed of that, but it in no way shifts the responsibility away from Newfoundland Power. All it really does is manage expectations in that if people know that the problem is with generation they expect it will take longer to fix. They are also not expecting to see repair crews dispatched. Positively, participants did assume that Newfoundland Power would be very prompt in dealing with any emergency or weather-related problem.

The PUB

Reaction to the PUB was positive and people did understand the basic regulatory role of the Board. The PUB is seen as a group that reviews rate increases to ensure they are reasonable. They are seen as taking the place of competition in that in a competitive market, other companies would act to keep prices low. People sense that the PUB is on their side and they do feel that requests are scrutinized rather than just “rubber stamped.”

Muskrat Falls

Muskrat Falls was discussed briefly at the end of each group in order to understand if people were expecting any changes or issues for Newfoundland Power because of the development. There is an expectation that rates will increase in the short term (5 – 10 years) to help pay for the development, but they will then decrease. Nobody is expecting any supply problems under the assumption that there will be more electricity and not less.

Discussion Guide
Newfoundland Power Focus Groups

1. **Introduction**

- Explain that we are going to be discussing various businesses in their area so that we can understand what is important to the image and reputation of these companies. So, we will be talking about some of the larger employers in this area and in the province.
- The session itself will last about 90 minutes. Relax and say what is on your mind. Explain the audio taping as a note taker.
- Get an introduction from each participant that includes their first name and a little about their family and work etc.

2. **Image and Reputation**

- I want to start fairly generally and get you to think of companies (let's limit it to the province) that you think have a good reputation or image. It doesn't really matter who we are talking about, but I want to try to understand what it is they are doing that makes you think positively about them.
- I will work from the flip chart, but maybe as a group, you can start to identify the things that these companies do? Let the group provide reasons, but we will probe by asking: Is it things that they do in the community like sponsorships or community involvement; is it how they run their business? How they treat people who work for them? Suppliers? How important they are to the economy? How they communicate? Etc. In all cases, we will delve into these items and not stay at a high level (for example, what is it about how they treat people?).
- Once we have as complete a list as the group can provide we will split people into smaller groups of 2 – 3 people and give them five minutes to discuss and identify the ones they consider to be most critical to a company having a good reputation/image.
- The little groups will report back and we will discuss the consistent points.

3. **Important Aspects of Image and Specific Companies**

- We have now identified the important items and now I want to start to talk about larger employers. When you think of these larger employers, which companies come to mind (we will want 3 – 4 including Newfoundland Power). First I want to get a sense of how good or poor you think the reputation/image of these companies are. Perhaps we can agree to a rating between 1 and 10 for each company.
- Discuss the main differences for ratings.
- Now let's take each company in turn and get an idea of how they are performing on each of the items that you said were important. (We will work through each important item for each company and discuss positive and negative points).
- Let's spend just a few minutes on what these companies do in the community. How important is their involvement in the community and is it in the places where they operate or is it throughout the province? Do you have different expectations of what these companies can and should be doing? Should a company like NL Power be involved in different activities than say a Sobeys? (**I thought we could deal with community involvement here as we were doing the other companies**)
- Once every company is discussed; has the discussion made you want to change your initial evaluation of any of these companies?

4. Role of NL Power, NL/Lab Hydro

- I want to focus on the generating and delivery of electricity to your homes. First, who do you think of as being involved in that process? Give a little time for people to answer and then probe for an understanding of the roles of NL Power, Newfoundland and Labrador Hydro.
- Let me give you a scenario. You are sitting at home on a winter night and the power flickers a few times and then goes out. What is your first thought? Who of the companies we have just spoken about would you think is most responsible? Are you confident that they are doing everything they can to get the power back on?
- What if the same thing happens but it is a nice evening in the middle of the summer with no apparent weather system? Who do you think might be involved now? Do people differentiate between generating electricity and the transmission or delivery of that electricity?
- Let me move to the ownership of these two companies. What can you tell me about the ownership structure of Newfoundland and Labrador Hydro and Newfoundland Power? How are they different? Is that something that would change how they operate?

5. The PUB

- And here is another one. Let's imagine there is a price increase of 2% announced for electricity. What is the role of the PUB in that price increase? Do you get the sense that they scrutinize and challenge a request for a price increase? If the PUB did challenge something, what would you think?
- Is the PUB involved in any way in other things that Newfoundland Power wants to do? Do you see the PUB as an organization that has a large amount of control over the activities of Newfoundland Power or are they more of a "rubber stamp" process?

6. Muskrat Falls

- Let's just spend the last few minutes on the development at Muskrat Falls. I am less concerned about whether you agree or disagree with the development, but I am wondering if you think it will impact Newfoundland Power's world in any way. How would it impact if at all? Are you anticipating any differences in price? Any other impacts?

7. Conclusion

- Thank participants. Identify client and assure participants that the session is exactly what it appeared to be – a way to understand what Newfoundland Power does well and poorly.

Newfoundland Power Corporate Reputation Questionnaire

Hello, my name is _________ from MQO Research, a professional research company located in Atlantic Canada. Today/tonight we are conducting a short survey on public perception of local companies. May I please speak someone in the household who is 18 years old or older?

IF UNAVAILABLE, ARRANGE FOR A CALL-BACK. WHEN CORRECT PERSON IS ON THE LINE READ:

Do you have a few minutes to complete the survey? (**IF ASKED:** It will take about 13 minutes of your time.)

Yes .... 1 **CONTINUE**
No .... 2 Is there a more convenient time for me to call back?

ARRANGE CALLBACK OR THANK AND TERMINATE.

S1. Are you, or is anyone in your household, employed by:

A marketing research company	1	*TERMINATE*
A newspaper, radio, television, or public relations firm	2	*TERMINATE*
A utility or energy company	3	*TERMINATE*
IF NO FOR ALL	5	*CONTINUE*

IF RESPONDENT AGREES TO CONTINUE, ADD: This call may be monitored for quality purposes. If a respondent questions the validity of the survey, the call or our organization please state:

MQO Research has been conducting research studies in Canada and abroad for 30 years. We are a Member of the Canadian Marketing Research Intelligence Association (MRIA) which is responsible for regulating marketing research practices in Canada. MQO adheres very strictly to all guidelines of professionalism and privacy as outlined by the MRIA. This study is registered with the Association. If you would like to contact the MRIA to verify the legitimacy of this research study or our company please call 1-800-554-9996 toll free and reference survey Number: 20140421-869D **If a respondent questions the confidentiality of the information that they are providing please state the following:**

As a member of the Marketing Research Intelligence Association (MRIA) we adhere to strict standards of privacy and confidentiality. Our data is presented in aggregate form. Information will never be released to our client or any other third party in a manner that could be used in an attempt to disclose your identity.

Newfoundland Power Corporate Reputation Questionnaire

Let's start with some general questions about three companies in Newfoundland and Labrador

Q1. How would you rate the overall reputation of (Read Choice)? Please use a scale of 1 to 10 where 1 is "Poor" and 10 is "Excellent". Rotate order

a. Newfoundland Power
1 – 10 ____
Refused (VOL)....................98
Don't Know / Not Sure (VOL)....................99

For ratings of 6 or less – Ask: Why do you feel that way? RECORD RESPONSE

---

b. [redacted]
1 – 10 ____
Refused (VOL)....................98
Don't Know / Not Sure (VOL)....................99

For ratings of 6 or less – Ask: Why do you feel that way? RECORD RESPONSE

---

c. [redacted]
1 – 10 ____
Refused (VOL)....................98
Don't Know / Not Sure (VOL)....................99

d. [redacted]
1 – 10 ____
Refused (VOL)....................98
Don't Know / Not Sure (VOL)....................99

e. Newfoundland and Labrador Hydro?
1 – 10 ____
Refused (VOL)....................98
Don't Know / Not Sure (VOL)....................99

f. [redacted]
1 – 10 ____
Refused (VOL)....................98
Don't Know / Not Sure (VOL)....................99

For ratings of 6 or less – Ask: Why do you feel that way? RECORD RESPONSE

Newfoundland Power Corporate Reputation Questionnaire

Now I would like to focus on just one of those companies and in your case that is Newfoundland Power.

Q2a. How would you rate the overall reputation of Newfoundland Power? Please use a scale of 1 to 10 where 1 is "Poor" and 10 is "Excellent".

1 – 10 ____
Refused (VOL)..99
Don't Know / Not Sure (VOL)...98

For ratings of 6 or less – Ask: Why do you feel that way? RECORD RESPONSE

Q2b. How would you rate your overall satisfaction with Newfoundland Power? Please use a scale of 1 to 10 where 1 is "Poor" and 10 is "Excellent".

1 – 10 ____
Refused (VOL)..99
Don't Know / Not Sure (VOL)...98

For ratings of 6 or less – Ask: Why do you feel that way? RECORD RESPONSE

Q3. And now, how would you rate your overall opinion of Newfoundland Power? Please use a scale of 1 to 10 where 1 is "Poor" and 10 is "Excellent".

1 – 10 ____
Refused (VOL)..98
Don't Know / Not Sure (VOL)...99

For ratings of 6 or less – Ask: Why do you feel that way? RECORD RESPONSE

Q4. **Next** I am going to start with some questions about your general opinions of Newfoundland Power and how they run their business. For each statement, please rate Newfoundland Power using a scale of 1 to 10 where 1 is "Poor" and 10 is "Excellent". **READ LIST, ROTATE LIST**

a. The quality and reliability of the electricity they provide
b. Being backed by solid technology and expertise
c. Ability to make good business decisions
d. Ability to efficiently manage their financial resources
e. Willingness to take responsibility for their actions
f. Willingness to publicly share information
g. Taking an active role in education about electricity and safety
h. Maintaining good relationships with employees

Newfoundland Power Corporate Reputation Questionnaire

i. Offering fair wages and benefits to employees
j. Being involved in the community
k. Having a clear vision for the future
l. Having knowledgeable staff
m. Having a responsible attitude towards the environment
n. Having a focus on renewable energy
o. Being concerned about the safety of their employees
p. Providing excellent customer service
q. Creating Jobs in Newfoundland and Labrador
r. Donating to charities and community groups
s. Hiring people from the province whenever they can
t. Being concerned about the safety of the general public
u. Minimizing pollution from their operations
v. Providing good value for the price to its customers
w. Being concerned about the future of the communities it operates in
x. A company that I admire and respect
y. Being trustworthy
z. Being a company that cares about the public
aa. Wisely using the money customers spend with them
bb. Actively promoting ways to be energy efficient
cc. Being a good employer (will be mixed in randomly)
dd. A place I would recommend as a good place to work (mixed in randomly)
ee. Always keeping the public informed through communications
ff. Providing bills that are clear and easy to understand
gg. Providing convenient methods of payment

Q5a. Before today, have you heard of Newfoundland Power's Power of Life Project?

Yes ....1 ASK 5B
No..2 GO TO 6
Don't Know/Not Sure ....9 GO TO 6

Q5b. What can you tell me about the Power of Life Project? PROBE AND CHECK AS MANY AS APPLY

Only heard of/don't Know much/Can't tell anything 1
Cancer Charity..2
Dr. H. Bliss Murphy Cancer Care Foundation..............3
Funds for cancer treatment and education 4
Promotes cancer screening and education..............5
Other (please specify) ____________________
Refused (VOL.) 99

Newfoundland Power Corporate Reputation Questionnaire

I just have a few more questions about you and your household that will help us analyze the survey results. As with all the answers you have provided, your responses will be kept strictly confidential.

Q6. Which of the following best describes your current employment status? Are you… **READ LIST**

Employed by a company/ organization..1
Self employed..2
Not employed outside the house & looking for work................................3
Not employed outside the house & not
looking for work 4
Retired 5
A student..6
Refused (VOL.) 99

Q7. Which of the following best describes the highest level of education you have had an opportunity to complete? **READ LIST**

Less than high school 1
Graduated high school 2
Some trade/ technical college...3
Graduated trade/ technical college 4
Some university 5
Graduated university 6
Refused (VOL.)...99

Q8. **IF RESPONDENT REFUSES TO PROVIDE YEAR OF BIRTH, ASK**: Into which of the following broad age categories do you fall? Are you…?

Between 18 and 24 years of age 1
Between 25 and 34 years of age 2
Between 35 and 44 years of age 3
Between 45 and 54 years of age 4
Between 55 and 64 years of age 5
65 years of age or older...6
Refused (VOL.)...99

9. Into which of the following categories does your annual household income fall? **READ LIST**

Less than $20,000 1
$20,000 to less than $40,000 2
$40,000 to less than $60,000 3
$60,000 to less than $80,000 4
$80,000 to less than $100,000 5
$100,000 or more 6
Refused (VOL.)...99

Q10. In which community do you live? **RECORD RESPONSE**

Q11. Please observe gender

Male..1
Female 2

Thank you very much for your time. You have been very helpful and all your answers will be kept strictly confidential.

takeCHARGE! Home Energy Use
& Conservation Tracking Study
(May 2013)

NEWFOUNDLAND POWER
A FORTIS COMPANY

newfoundland labrador hydro

take CHARGE! Saving Energy Starts Here NL

2013 Tracking Study

Technical Report on Home Energy Use and Conservation Practices among Households in Newfoundland and Labrador

Prepared by Focal Research Consultants

FOCAL Research

May 2013

Contents

EXECUTIVE SUMMARY i

Summary of Key Findings: i

Use of Electricity for Home Heating i

Opportunities & Threats Identified: vi

1.0 INTRODUCTION & METHOD 1

- **1.1. Project Background** 1
- **1.2. 2013 Annual Residential Home Energy Use and Conservation Survey** 2
- **1.3. Readiness to Change (Stages of Change Model)** 2
- **1.4. Research design & Methodology** 3
- **1.5. Data Weighting** 4
- **1.6. Ethics and Data Security** 4
- **1.7. Limitations** 5
- **1.8. Analysis** 5
- **1.9. Panel** 6

2.0 SUMMARY OF FINDINGS 7

- **2.1 Home Heating In Newfoundland and Labrador** 7
- **2.2 Household Electricity Costs** 10
- **2.3 Exclusive Use of Electric Home Heating** 12
- **2.4 Use of Heat Recovery Ventilator (HRV) & Air Exchanger (AE)** 13
- **2.5 Home Energy Conservation** 18
- **2.6 Reasons for Conserving Electricity** 20
- **2.7 Changes in Home Energy Use** 21
- **2.8 Interest in Changes to Reduce Home Energy Use** 24
- **2.9 Opportunities to Support Change** 25
- **2.10 Top-of-Mind Awareness for Advertising Promoting Energy Savings** 26
- **2.11 Awareness of the takeCHARGE Energy Saving Campaign** 29
- **2.12 Awareness & Use of takeCHARGE Website & Facebook** 32
- **2.13 Awareness of the takeCHARGE TV Advertising** 34
- **2.14 Reductions in Electricity Use as a Result of the takeCHARGE Campaign** 35

2.15 Awareness & Use of Rebate Programs 36
2.16 Participation in the Rebate Program 38
2.17 Preferred Information Sources....................40
2.18 Coupon Use & Potential for Stimulating Purchase 44
2.19 Delivery of Energy Efficient Information and Rebate Programs 45
2.20 Use of Social Media 46

Appendix A- Survey A-1
Appendix B – Data Tables B-1

Table of Figures

Figure 1: Main Source for Home Heating (2009-2013) 7
Figure 2: Primary versus Secondary Home Heating Sources (2013 Only) 8
Figure 3: Distribution of Average Monthly Winter Electric Bill (2013 Only) 10
Figure 4: Percent Using Electricity Exclusively for Home Heating (2010 versus 2012, 2013) 12
Figure 5: Percent Using Electricity Exclusively for Home Heating by Region 13
Figure 6: Percent with a Heat Recovery Ventilator (HRV) or Air Exchange (AE) 14
Figure 7: Percent with a Heat Recovery Ventilator (HRV) or Air Exchange (AE) by Region 14
Figure 8: Age of Current HRV & AE (2013 Only) 15
Figure 9: Reported Incentives for Upgrading to an Energy Efficient HRV or AE 17
Figure 10: 2013 Frequency of Households Making Effort to Conserve Energy 18
Figure 11: Frequency of Reducing Home Electricity Use by Region (2013) 18
Figure 12: Motivations for Reducing Electrical Use (2010, 2012, 2013) 20
Figure 13: Household Energy Conservation Activity by Stages of Change 22
Figure 14: Current Profile of Household Conservation Activity and Interest 24
Figure 15: Percent of Households Who Have Not Thought About Specific Initiatives (Pre-Contemplation: 2012 versus 2013) 26
Figure 16: Top-of-Mind Awareness of Energy Savings Advertising Campaign 27
Figure 17: Top-of-Mind Awareness of Energy Saving Adverting Campaigns 27
Figure 18: Top-of-Mind Recall of Energy Saving Campaigns 28
Figure 19: Aided Awareness of takeCHARGE Program 29
Figure 20: Aided Recall of takeCHARGE Campaign 30
Figure 21: Frequency of Visiting the TakeCHARGE Website 2013 among those Aware of the Site (n=57) 33
Figure 22: Aided Awareness of takeCHARGE Television Advertising (2013) 34
Figure 23: Aided Awareness of takeCHARGE TV Advertising Campaign 35
Figure 24: Reduction in Electricity Use due to takeCHARGE Campaign 2013 35
Figure 25: Percent Participating in Rebate Program in 2013 38
Figure 26: Source of Information on Rebate Programs (2012, 2013) 39
Figure 27: Likelihood of Using Sources for Information on Energy Efficient Products, Services & Tips 40
Figure 27: Those Very Likely to Use the Following Sources for Information on Energy Efficient Products, Services & Tips (2013 versus 2012) 42
Figure 29: % Redeeming Coupons in Past Year (2013) 44
Figure 30: Use of Social Media Accounts 2012 versus 2013 46

Figure 31: Percent with Social Media Accounts (2012 versus 2013) 46

Table of Tables

Table 1: Weighting by Area 4
Table 2: Research Panel Membership by Year 6
Table 3: Main Heating Source by Region (2012 versus 2013) 9
Table 4: Main Heating Source by Region 11
Table 5: Use of Heat Recovery Ventilator (HRV) 15
Table 6: Use of Air Exchanger (AE) 16
Table 7: Frequency of Making Efforts to Conserve Energy 2012 vs. 2013 18
Table 8: Main Reason for Conserving Electricity by Region (2012 versus 2013) 21
Table 9: Unaided Recall of Sponsoring Agency by Region (2013) 28
Table 10: Source of Campaign Awareness (2013) 30
Table 11: Awareness % & Use of takeCHARGE's Website (2013) 32
Table 12: Awareness % & Use of takeCHARGE's Facebook (2013) 33
Table 13: Awareness & Use of Rebate Programs (2013) 36
Table 14: Use of 'Do-it Yourself' or Paid Assistance for Rebate Programs (2013) 37
Table 15: Rebates Applied for by total & for Program Participants (2013) 39
Table 16: Preferred Resource for Information on Energy Efficiency 43
Table 17: Energy Efficient Information Provider and Program Delivery (2013) 45

Executive Summary

In 2008 Newfoundland Power and Newfoundland & Labrador Hydro engaged in a joint initiative to raise awareness about energy efficiency in the province and to encourage residential and commercial customers to take action in reducing energy use and waste. A new program, takeCHARGE NL, was introduced in November 2008 offering residents in Newfoundland and Labrador information, tips, and tools to assist them in using energy more wisely. At that time an annual tracking study was undertaken among residential households to monitor home energy use and conservation, evaluate brand awareness, program uptake and impacts and to inform ongoing evidence-based decision-making. A wide variety of advertising media including TV commercials, radio, print, online as well as in-store events have contributed to campaign success to-date in meeting annual targets among NL residents. In 2010 a new strategy was adopted for the program to build and stimulate consumer relationships. A three pronged approach was put forward: 1) to use a mix of online and offline tools to build relationships with the key audience for takeCHARGE NL; 2) to undertake activity that moves the consumer along the continuum of energy efficiency practices (e.g., from no cost/low cost solutions to more significant action); and 3) to increase focus on intercepting consumers outside traditional advertising encouraging greater brand engagement.

The 2013 NL Home Energy Use & Conservation Tracking Study marks the third tracking survey (2009, 2010, 2012, 2013). From March 19 to April 5, 2013, 600 surveys were conducted with randomly selected households throughout Newfoundland and Labrador with a response rate of 44%. Survey results are considered representative, and therefore, can be generalized to the population of interest at-large. Estimates at a total provincial level are accurate with a margin of error of ± 4.0%, 19 out of 20 times the survey is conducted (i.e., 95% Confidence Level (CI)).

Summary of Key Findings:

Use of Electricity for Home Heating

- Overall, home heating profiles in NL remained fairly stable following the changes observed in 2012. When secondary sources were taken into consideration, 70% of NL households were using electricity as either a primary (58%) or back-up heat source (12%) in 2013, a rate only slightly below 2012 when 74% reported any use of electricity.
- While provincial profiles remained stable there were regional changes that occurred in 2013.

- Use of electricity for home heating in Labrador increased in 2013 (86% versus 78%). The number of households exclusively relying on electricity for heat also went up from 71% to 78% making this market the highest user of electricity in the province.
- Overall, use of wood as a primary source for home heating also increased by 64% over the past five years moving from 11% to 18%. This increase was largely due to households on the island outside of St. John's CMA where use of wood (30%) exceeded home heating oil (20%) for primary home heating purposes (30% versus 20%).
- Average monthly electricity costs also appear to be on the rise in all areas of the province although differences have not yet reached a significant threshold. (2013: $233.62 versus 2012: $223.76). These perceptions of increased cost warrant monitoring.
- Estimates of average monthly electric costs were highest in St. John's at $251.16 followed by Rest of Province at $224.61, although it should be noted that rates of any electric use for home heating were significantly higher in St. John's thus driving up costs (78% versus 63%).
- In Labrador, where 90% of households reported any use of electricity for home heating average monthly costs were estimated to be about $199.69. While this amount is lower than elsewhere in the province it still represents the highest monthly estimates within Labrador since tracking was initiated in 2009.

Heat Recovery Ventilators (HRVs) and Air Exchangers (AEs)

- Households in NL are over twice as likely to report having an air exchanger (AE: 24%) than a heart recovery ventilator (HRV: 10%).
- There was no difference in the percent of households across the province with HRVs but AE use was significantly higher is St. John's (39%), followed by Labrador (27%) and only 14% in Rest of Province.
- AEs tend to be older than HRVs and only 56% believed they had an energy efficient model installed as compared to 70% for HRVs.
- Currently, 2.2% of all participating households are anticipating they will replace an air exchanger within the next five years and 1.3% expect to replace their HRV with almost all intending to purchase energy efficient models.

- Access to rebates, coupons and, for those living outside St. John's and Labrador, help with installation would support upgrades.

Electricity Conservation

- Most residents continued to make efforts to conserve energy with no change over the past year ranging from a high of 89% in St. Johns to a low of 78% in Labrador positioning the latter as a key market for making energy conservation a more relevant issue for consumers.

- St. John's residents continue to be most conscientious about saving energy yet one in four households in Labrador (23%) and 18% in ROP indicated that they never make an effort to conserve suggesting targeted efforts might be helpful in both areas.

- Those least likely to engage in active conservation tend to be older, have lower education and income profiles, are least likely to have children living in the house and are most often living in single adult households either widowed or single. These groups represent distinctive targets for reduced energy use.

- In particular, adults age 65 years of age of older are identified for attention as this growing group of seniors also, on average, are living in older less efficient homes.

Motivations for Conservation

- In 2013 "saving money" continues to be the primary motivation underlying conservation efforts especially in St. John's (95%) and ROP (95%) versus Labrador (86%).

- However, over the past year the percent "seeking to conserve energy" went up in all areas, a rate three times higher than in 2012 (13% versus 4%) indicative of a shift in attitudes consistent with previous advertising messaging.

- Despite high reported interest in making energy efficient changes, the actual number of households engaged in various conservation activities declined from 51% in 2012 to 45% in 2013 suggesting that converting interest to action will require greater consumer support and engagement.

- Purchasing energy efficient appliances and products, replacing weather stripping (24%), caulking of windows and vents (18%), replacing light bulbs with compact fluorescent bulbs (10%), comprised the majority of past year conservation activity and most of that planned for the next 12 months.

- Yet there still seems to be many conservation activities that are off the radar of most households including LED light use, use of dimmable compact fluorescent bulbs, installation of timers or motion detectors, insulating hot water heaters, installing foam gaskets on outlets and using other Energy Star products and devices beyond appliances.

Awareness of Advertising

- Top-of-mind awareness of advertising promoting energy conservation dropped from 57% in 2012 to 49% in 2013, especially in St. John's (54% versus 65%) and ROP (44% versus 52%) while holding steady in Labrador at 54%.

- Linkage of energy conservation advertising to Newfoundland Power also declined by almost one third (21% versus 32%) over the past year due to drops for recall in St. Johns (29% versus 42%) and in Rest of Province (18% versus 28%).

- In contrast, recall of NL Hydro remained steady in Labrador at 30%.

- Despite declines in general energy conservation advertising awareness, recall of the takeCHARGE program improved over the past year moving from 54% in 2012 to 64% in 2013. This increase in program recognition suggests there is ongoing equity for the takeCHARGE 'brand'.

- Awareness of the takeCHARGE website also increased from 19% to 25% although this has not yet translated into increased site visits. The improvement was entirely due to increased awareness among those living outside St. John's CMA and Labrador with recall now similar in all areas of the province.

- Awareness of takeCHARGE's FaceBook page is also up from 5% to 8% but again visits to the page in the past year remained unchanged. It may be that incentives will be required to motivate residents to visit both the website and/or FaceBook page.

- There has been no change in the exposure rates or impact for the takeCHARGE TV ad suggesting the ad is due for replacement or up-dating. Again, the messaging was clearly understood, most found it at least somewhat effective and 11% self-reported reductions in energy use as a direct result of being exposed to the campaign.

Consumer Engagement

- There has been little change in awareness of the rebate programs and only marginal non-significant gains in participation.

- Overall, 11% reported taking part in one of the rebate programs and 10% applied for a rebate primarily for the window replacement (6%) and insulation of basements (3%) and attics (4%). Future interest is highest for programmable thermostats among those already aware of the various rebate programs.

- Stimulating awareness and interest for the rebate program especially outside the St. John's CMA area will likely require a new strategy as the current campaign appears to be have maximized its impact.

- Television, (52%) bill inserts & newsletters (44%) website (44%) and retailers (38%) all top the list of resources most likely to be used to find information on energy savings.

- However, there is evidence that use of multiple resources including newspaper radio and online continues to expand reach beyond the traditional bill inserts and television ads. An integrated campaign over the various mediums will ensure communications remain on message reinforcing desired actions and supporting outcomes as residents encounter the information in different mediums.

- The power companies were perceived to be the best choice for disseminating info on energy conservation whereas rebates and financial incentives were equally likely to be seen as falling under the provincial government.

- Bill inserts continue as a preferred method (53%) for communicating energy saving tips and information followed distantly by TV (15%) & website (12%).

- However, one in four participants spontaneously noted the appeal of email as a preferred source for informing residents. This medium may offer a more environmentally friendly & personalized approach for alerting customers to relevant energy conservation materials that can be customized to meet their specific needs. Such messaging can also direct or link customers to other online resources such as the website or customer service support.

- There may also be opportunities to further customize programming and customer reach through on-line account management services and relationship marketing (e.g., encouraging customers to go online to pay bills, view their electricity usage and at the same time link conservation information or tips relevant to their specific household behaviour.

- With about one-third of customers strongly interested in energy saving coupons there appears to be opportunities for cross-promotions linking takeCHARGE to other product or event promotion and/or 'incentivizing' energy efficient purchasing with potential for coupons to be downloadable from the website or offered to reward customers for viewing other conservation materials.

Opportunities & Threats Identified:

In 2013, it appears that energy conservation and customer engagement has leveled off in the residential market. The takeCHARGE brand continues to have equity with residential consumers and there was increased awareness of the program especially in households outside of St. John's and Labrador, a region that previously had lagged behind the other areas. More residents are aware of the website resources and there is evidence that messaging has been internalized. However, increased awareness has not produced corresponding increases in use or engagement over the past year and fewer households are reportedly planning any conservation activities, primarily due to oversight rather than outright rejection. While, the current campaign and communication strategies do not evoke any strong negativity they also do not appear to be creating any new energy for the program and are due for refreshment or replacement. It is time to remind residents of options for reducing home energy consumption that have the added benefit of saving them money.

Currently, the most affluent, educated consumers are those most likely to be benefiting from energy conservation efforts with both awareness and program use higher within these groups. However, with an aging population, those over 65 years are becoming a more important target and tend to have lower rates of conservation, older homes and more difficulties for do-it-yourself projects. Lower income and single adult households also encounter more obstacles for energy conservation as do those living in communities outside of St. John's CMA. More often, conservation in Rest of Province centers on using other resources such as wood for home heating rather than making energy efficient improvements. In fact, use of wood has increased significantly over the past few years especially among older and lower income residents.

These findings suggest there may be opportunities for targeting community organizations as a go-between for supporting household energy conservation in NL; essentially takeCHARGE programs for communities and/or local retailers to assist challenged households in applying for programs, and making energy efficient changes. It may even be a way to encourage broader community engagement with the takeCHARGE brand and energy conservation (e.g., communities competing to reduce energy use or conversely making energy efficient changes, making takeCHARGE relevant for more residents).

Regardless, it is now time to start thinking outside the box in terms of extending program reach as those most capable of taking advantage of most of the rebate programs have done so, with waning interest now evident among those aware of the program. Therefore, the goal for new messaging will to reach out to those who have not been targeted by the current programming; new ways of communicating the same messaging.

Traditional means of communication are still reported to have value in alerting consumers to energy information and tips but there is emerging evidence that online opportunities could be used to augment and support communication of more detailed and specific information. This seems to be especially true in supporting the do-it-yourself markets and current rebate programs. Incentives for supporting site visits and the regularity of such interaction will provide an effective method for reaching customers with information, tools and tips.

Residents also appear to be interested in more detailed and customized interactions suggesting opportunities may exist to link monthly online information on electricity use to conservation ideas and options.

Example: Readiness to Change Continuum & Rebate Programs

Pre-Comteplation

- 61% are unaware of programmable thermostat rebate program
- 59% are unaware of window replacement rebate program
- 63% are unaware of attic insulation upgrade rebate program
- OBJECTIVE: *Increase awareness among wider targets to support program interest*

Contemplation

- 23% are interested in taking part in program for thermostat rebates
- 13% are interested in taking part in window replacement rebate program
- 12% are interested in taking part in attic insulation upgrade rebate program
- OBJECTIVE: *Identify opportunities and threats impacting conversion of interest to action (e.g., what prevents these people from acting on interest)*

Preparation

- OBJECTIVE: *Facilitate consumer uptake of rebate programs by addressing opportunitieis and threats identified among targets then monitor impact of initiative(s) in meeting objectives for helping consumers implement change*

Action

- 4% have installed programmable thermostats
- 6% have replaced windows
- 4% have upgraded attics
- Objective: *How are these people different from those who have not yet acted? How did they learn about the program and why did they take part? Can we increase uptake among similar groups/different groups?*

1.0 Introduction & Method

1.1. Project Background

In 2008 Newfoundland Power and Newfoundland & Labrador Hydro engaged in a joint initiative to raise awareness about energy efficiency in the province and to encourage residential and commercial customers to take action in reducing energy use and waste. In November 2008 a new program, takeCHARGE NL was introduced offering residents in Newfoundland and Labrador information, tips, and tools to assist them in using energy more wisely. Evaluative research has been a cornerstone of the takeCHARGE Program since its inception with the annual household tracking study initiated in 2009 to assess the impact of the program for household energy use and conservation.

Since 2009, there has been increasing awareness of takeCHARGE NL and growth in the uptake of program rebates. A wide variety of advertising media including TV commercials, radio, print, online as well as in-store events have contributed to campaign success to-date in meeting annual targets among NL residents.

In 2010, a new strategy adopted for takeCHARGE moved the program beyond awareness and usage goals towards fostering consumer relationships with the program. A multi-layered, three-pronged approach was adopted to support this objective:

1. Use of a mix of online and offline tools to build relationships with the key audience(s) for takeCHARGE NL;
2. Activity undertaken that moves the consumer along the continuum of energy efficiency practices (e.g., from no cost/low cost solutions to more significant action); and,
3. Increased focus on intercepting consumers outside traditional advertising encouraging greater brand engagement.

In October 2010, takeCHARGE also added social media to the mix introducing a Facebook page for the program.

Online resources now include the website (takeCHARGEnl.ca), a Youtube channel for commercials and instructional videos and options for Twitter and program blogs to further support dialogue and interactional discussion with consumers.

Given branding and program development over the past three years, the research goals for the program also evolved. In 2012, Focal Research was retained as an independent research partner to bring a new research perspective, additional resources, and fresh insight to the project. Focal was again retained in 2013 to continue to administer the survey under the direction of the project team at Newfoundland Power and Newfoundland Labrador Hydro

1.2. 2013 Annual Residential Home Energy Use and Conservation Survey

In 2012, Focal Research introduced a number of modifications and improvements to the annual takeCHARGE Residential Home Energy Use and Conservation Survey including:

- Introduction of a new evaluative framework called the 'Stages of Change' or more accurately 'Readiness to Change Model' to assess how campaign initiatives impact consumer movement along a continuum of change.
- Creation of a customized research panel for cost effective access to qualified respondents for future research (e.g., return-to-sample methods; in-depth interviewing, pilots & trials)

1.3. Readiness to Change (Stages of Change Model)

The Stages of Change Model was adopted as a framework for assessing consumer readiness for changing energy use and energy conservation.

'Stages of Change' is a key component of the Transtheoretical Model of behaviour change (TTM) (Prochaska, DiClemente & Norcross, 1992)[1] that considers behavioral change to be part of a process that occurs over time progressing through a series of five stages:

Stages of Change	Description
Precontemplation	*Those who are not considering taking action within the next 6 months*
Contemplation	*Those who seriously consider taking action in the next 6 months*
Preparation	*Those who are planning or 'intending' to take action in the next 30 days*
Action	*Those who have taken action within the last 6 months*
Maintenance	*Those who had taken action more than 6 months ago*

This model is widely used in the area of health promotion, in particular to predict outcomes in achieving change in unhealthy behaviour (e.g., smoking cessation, weight loss). However, it has also been applied to many other types of consumer behaviours (e.g., energy use, financial saving, recycling) in order to develop appropriate strategies to support and evaluate change at

[1] Prochaska JO, DiClemente CC, Norcross JC. In search of how people change. Am Psychol 1992; 47:1102-4

each of the various stages. This is especially useful from a prevention perspective or when trying to advance long-term change that will not occur overnight.

The goal is to match resources and support to consumers falling at each of the stages of changes in order to continue to help move people forward in extinguishing undesirable behaviours and adopting more healthy or desirable activities/behaviours.

In the case of the takeCHARGE Program, the focus is on assessing how the campaign impacts those at each of the stages of readiness to change. This means that instead of exclusively focusing on those who fall at the action stage (e.g., plan on taking action to reduce energy use) it is also possible to track how effective various initiates may be moving consumers along a continuum of change to ultimately reach and sustain positive changes in home energy consumption.

This makes the evaluative measure much more sensitive to changes overtime and alerts the takeCHARGE team to how the campaign is impacting specific users and how to refine specific targets to maximize impacts.

Prochaska and DiClemente, authours of the Stages of Change approach encourage users to adapt the framework for use in other areas of inquiry and this model was successfully adopted and applied to the 2012 Home Energy Use and Conservation Survey.

1.4. Research design & Methodology

The study was conducted as a random telephone survey from Focal Research's centralized secure and fully supervised facility in Halifax Nova Scotia.

From March 18 to April 5, 2013 600 surveys were conducted with randomly selected households throughout Newfoundland and Labrador with a response rate of 44%. Survey results are considered representative, and therefore, can be generalized to the population of interest at-large. Estimates at a total provincial level are accurate with a margin of error of ± 4.0%, 19 out of 20 times the survey is conducted (i.e., 95% Confidence Level (CI)).

All data collection complied with Canadian Tri-council Ethics, provincial privacy legislation and national (MRIA) and international research standards. Focal has achieved gold seal status with the Marketing Research Intelligence Association of Canada for conducting marketing and social research.

Survey participation was restricted to one of the key decision-makers in randomly selected households throughout each of the target markets. All respondents were permanent residents of NL and informed consent was obtained prior to taking part in the study. All respondents were informed that their participation was voluntary and that they were able to withdraw at any time. (See Appendix A for a copy of the household participant screen and survey).

Random quality control checks were administered to 15% of all completed surveys to verify key data points and ensure respondents were comfortable participating in the study and that the interviewers had performed the survey correctly. Additionally, the data was examined and tested for interviewer bias to make sure there were no significant differences in responses on key data points among those conducting the survey.

1.5. Data Weighting

A stratified sampling technique was used whereby the survey was conducted as a random sample (n=200) in each of the three primary regions of St. John's CMA, Labrador, and Rest of Province (ROP).

The data was then combined (n=600) and proportionately weighted to reflect population statistics for each region in order to generate estimates for the total population of NL.[2]

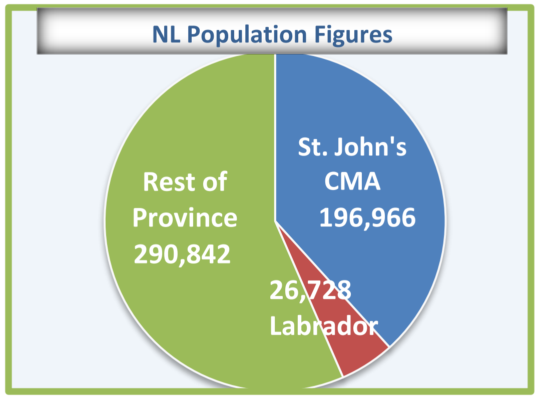


Table 1: Weighting by Area

			Weighted Sample by Area			Total	
Area	Pop	% of Pop	St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	Weighted (n=600)	Weighted %
Labrador	≈26,730	5.2%	0	104	0	104	5.2%
St. John's	≈197,000	38.3%	764	0	0	764	38.2%
Rest of Province	≈290,842	56.5%	0	0	1130	1130	56.5%
Total	**≈514,572**	**100%**	**764**	**104**	**1130**	**1998**	**99.9%**

1.6. Ethics and Data Security

The research was conducted according to Canadian Tri-council Ethics, in accordance with PIPEDA (Privacy of Information and Protection of Electronic Data Act) requirements and in compliance with national (MRIA) and international quantitative research standards (ICC/ESOMAR). [3]

[2] 2011 Statistics Canada Census Data http://www12.statcan.gc.ca/census-recensement/2011/dp-pd/hlt-fst/pd-pl/Table-Tableau.cfm?LANG=Eng&T=101&S=50&O=A
[3] Marketing Research and Intelligence Association of Canada (MRIA) http://www.mria-arim.ca; International Code of Conduct (ICC/ESOMAR) http://www.esomar.org/index.php/professional-standards.html

1.7. Limitations

As with all surveys there are limitations associated with sampling and non-sampling error. During data collection efforts were made to reduce sampling error by conducting multiple call-backs over extended days and times in order to increase the percent of eligible households completing the survey. In addition, to minimize the impact of non-sampling error, the data was cleaned and logic checks administered, and tests were conducted to assess interviewer bias. It is important to keep in mind that the information gathered was based on respondent's perceptions and self-reports of their behaviour. The survey was pre-tested to ensure comprehension and understanding prior to going to field. While effort was made to ask the questions in a non-biasing manner and to elicit accurate reports there are possibilities that respondents may have misunderstood the question or provided inaccurate information. Moreover, the information may no longer be in memory producing variations in respondent accuracy. Therefore, the findings are considered estimates only and can be expected to fall within the prescribed margins of errors 19 times out of 20 times the survey is conducted, keeping mind that there is a 1 in 20 chance the findings may vary significantly from actual population estimates. In the case of the current study all tests of significance reported take into account appropriate margins of error as reported below.

1.8. Analysis

Analysis was primarily descriptive in nature comparing findings by region and over time to identify trends where possible.

SPSS 13.0 (Statistical Package for the Social Sciences) was used to provide measures of central tendency, frequency distributions, and cross-tabulations, as well as to conduct statistical analyses (i.e., analysis of variance (ANOVA), chi-square, and other non-parametric procedures) to determine levels of association among the variables of interest and to detect changes over time.

Refer to Appendix B for detailed weighted data tables presented by region (St. John's CMA, Labrador and Rest of Province) and for total Newfoundland and Labrador estimates.

Test of significances were adjusted for use with finite populations and small sample sizes when appropriate.

Most research attempts to reduce TYPE I Errors; that is reducing the chance of saying there is a significant difference when there is not. As a result, most differences must be statistically significant at the 95% confidence interval (CI) or higher before they are reported. This high level of certainty or probability that something really does differ before it is accepted is very useful when testing theory or a particular hypothesis. However, when you reduce TYPE I errors you also increase the likelihood of making a TYPE II Error; that is saying there isn't a difference when there really is one. Balancing these two concepts is challenging especially when conducting research in 'real life' settings as opposed to a lab setting or using experimental design. Therefore, for most exploratory, market or social research that may be constrained by sample sizes and an inability to control environmental conditions, we recommend that the confidence level is dropped down to 90% to make sure the client is not missing potential opportunities or impacts that could have implications for the decision-making process. This ensures greater value is gained from the research process especially when being used to inform the creative process involved in advertising and communications.

All reported differences for the current study were significant at the minimum 90% confidence level for two-tailed testing unless otherwise noted with stars used to denote differences significant at a higher confidence level (*=p<.10: 90% CI; **=p<.05: 95% CI); ***=p<.001: 99% CI).

Please note that in some cases percentages may not add up to 100% due to rounding.

1.9. Panel

In 2012 and 2013 those households participating in the annual takeCHARGE NL Home Energy Use & Conservation Tracking Study were asked to join a confidential ongoing research panel. Names and addresses for those consenting to be re-contacted were entered into a household database that can be used for future research. Overall, 42% of randomly selected households taking part in the study in either year agreed to join the panel with a total sample size of 501 households from across the province with, 32% of panel members residing in St. John's CMA (n=164), 29% (n=146) coming from Labrador and the remaining 38% of panel members residing in the Rest of Province.

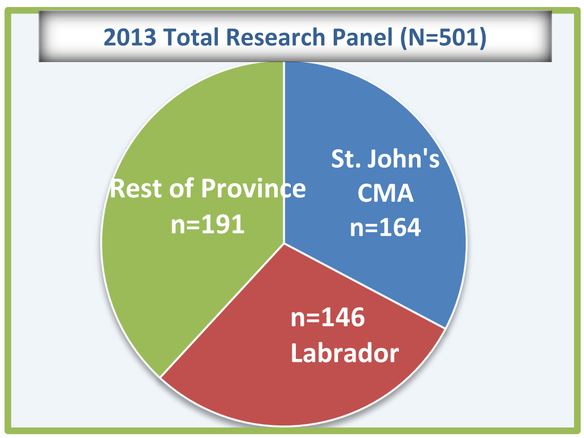


Table 2: Research Panel Membership by Year

CONFIDENTIAL TEST PANEL		TRACKING YEAR		TOTAL
		Year 1 - 2012	Year 2 - 2013	
Yes Joined panel	**Count**	**262**	**239**	**501**
	% within Tracking Year	**44%**	**40%**	**42%**
Not interested in panel	Count	338	361	699
	% within Tracking Year	56%	60%	58%
Total	Count	600	600	1200
	% within Tracking Year	100%	100%	100%

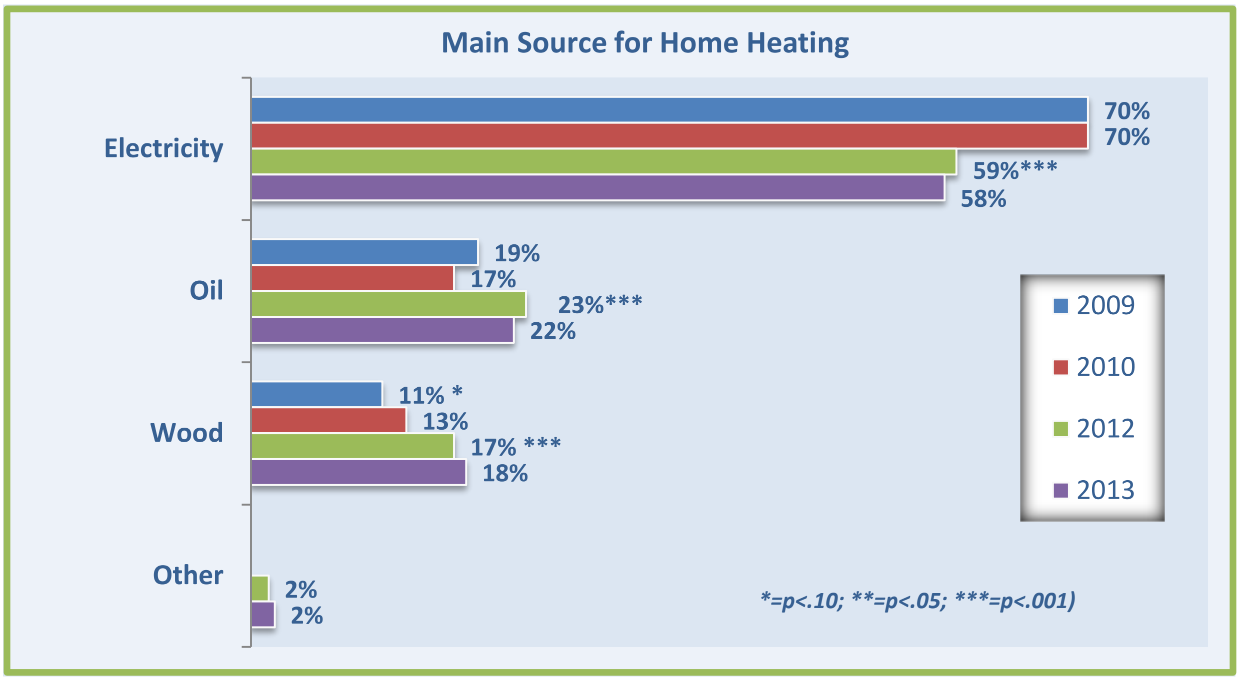
2.0 Summary of Findings

2.1 Home Heating In Newfoundland and Labrador

All respondents were asked to specify their primary and secondary sources for home heating during the winter months when home heating use is highest.

Overall Provincial Home Heating Profile

Figure 1: Main Source for Home Heating (2009-2013)

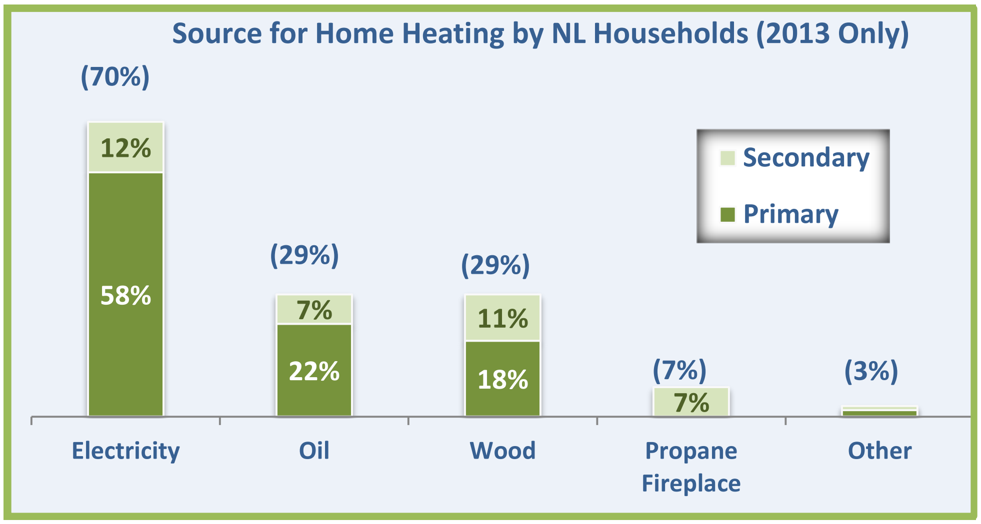


- Overall, primary home heating profiles remained stable following the changes occurring from 2010 to 2012.
- In 2012, there was a significant decline in the use of electricity as the main source of heat for residential homes (2010: 70% versus 2012: 59%) and an increase in the number of households reporting use of oil (2010: 17% versus 2012: 23%) or wood (2010: 11% versus 2012: 17%)
- In 2013, just over half of participating households (58%) in NL continued to rely on electricity as their primary source for home heating. This level of reported use is unchanged following the drop in 2012 (59%).

- In 2013 one in five households (22%) continued to use oil as a primary source for home heating followed closely by 18% using wood as their main heating source.

- It is noteworthy that over the past 5 years the percent of households in NL using wood as a primary source for home heating has increased by 64% moving from 11% in 2009 to 18% in 2013.

Figure 2: Primary versus Secondary Home Heating Sources (2013 Only)



- In 2013, 36% of all households reported use of at least one other back-up energy source for home heating, a rate to similar to back-up use in 2012 (40%).

- For the most part, there was little to no difference in the percent of residents in NL reporting use of any of the various options for supplementary home hearing; use of electricity (12%), wood (11%) and, to a slightly lesser extent, oil (7%) and propane (7%) were equally likely to be used as back-ups for home heating with little overlap between the various options.

- When secondary sources were taken into consideration, 70% of NL households were using electricity as a primary (58%) or back-up heat source (12%) in 2013, a rate only slightly below 2012 when 74% reported any use of electricity.

- Use of oil and wood for primary or secondary heating was also unchanged in 2013 with 29% of households using either source for any home heating purposes.

Regional Home Heating Profiles

Table 3: Main Heating Source by Region (2012 versus 2013)

Main Home Heating Source by Region 2012 versus 2013	St. John's (n=200)	Labrador (n=200)	RoP (n=200)	Total NL (n=600)
Electricity				
2012	73%	78%	48%***	59%
2013	70%	86%	48%***	58%
Oil				
2012	23%	5%***	24%	23%
2013	26%	5%	20%	22%
Wood				
2012	3%***	14%***	27%***	17%
2013	2%***	10%***	30%***	18%
Other				
2012	2%	3%	1%	2%
2013	2%	---	2%	2%

**=p<.10; **p<.05; ***p<.001 ↓ ↑= Direction of significant change p<.10 from 2012 to 2013*

- While the overall home heating profile was stable at a total provincial level, there were significant changes observed for the three provincial regions over the past year, largely due to increased electrical use in Labrador.

- In 2013, residents in Labrador were more likely to report using electricity as their main heat source compared to last year (86% versus 78%). As a result, Labrador households reported the highest rates of electric use as a primary source for home heating and continued to have the lowest use of oil (5%). When secondary sources were included, electricity was used in 90% of Labrador households for home heating in 2013.

- St. John's residents continued to report high use of electricity as a primary source for home heating (70%) but not to the extent observed in Labrador. An additional 8% reported using electricity for back-up heating. Oil use continued to be ranked second as a primary source (26%) with St. John's households reporting the lowest use of wood (2%) compared to anywhere else in the province, although 12% noted use of propane fireplaces for back-up heating.

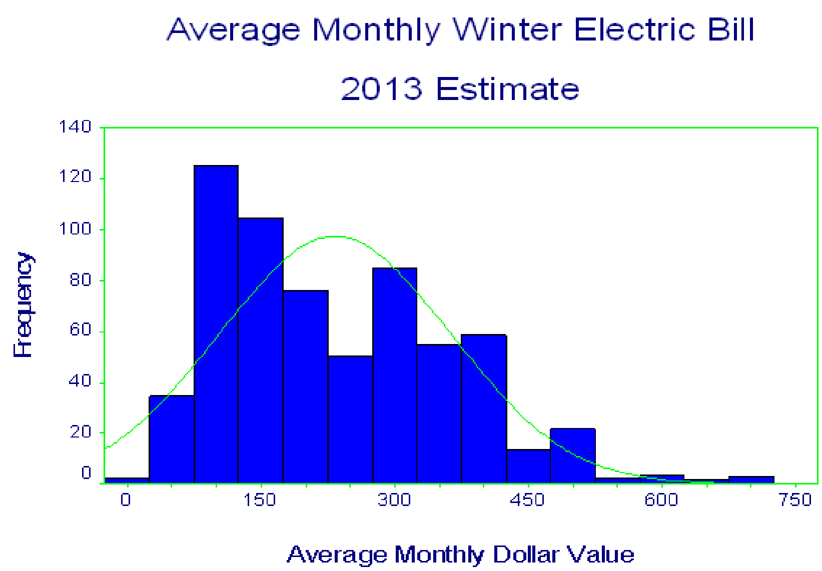
- In contrast, only 48% of households in the Rest of Province primarily used electricity for home heating with 43% using supplementary heat sources. This area had the highest rate of electric use for back-up heating (15%), although total use was still lowest at 63%.

Wood was used more often as a main heating source in this region exceeding oil use in 2013 (30% versus 20%).

2.2 Household Electricity Costs

- Overall, 86% of those taking part in the survey were very familiar with the cost of their household electricity use, with 13% somewhat familiar and 1% noting that the amount was included in their rent.
- Those living in Labrador were less likely to be very familiar with these amounts (77% versus St. John's CMA: 83% & Rest of Province: 88%) although the vast majority in all three regions of the province were well-informed on their household electricity costs.
- For the most part, estimates of monthly electrical costs in 2013 fell between $100-$400/month.

Figure 3: Distribution of Average Monthly Winter Electric Bill (2013 Only)



- Average monthly electrical costs had remained relatively stable from 2009 to 2010 but in 2012 there was a significant drop in the amount reportedly spent on electricity during the winter months.
- In 2013, there is evidence that average electricity costs are now starting to go up in all regions although these perceived costs have not yet reached a significant increase at the minimum 90% confidence level (p=.14).

- On average, households in NL estimated spending about $233.62 per month (median = $200.00) during the high use winter season. Estimated amounts in 2013 still fell under those reported in 2008 & 2009.

Table 4: Main Heating Source by Region

Average Monthly Electric Bill				
	2008	2009	2012	2013
Total (n=600)	**$240.12**	**$239.20**	**$223.76↓**	**$233.62**
St. John's CMA (n=200)	$251.54	$264.14	$245.79↓	$251.16
Labrador (n=200)	$188.64	$164.42	$186.90↑	$199.69
Rest of Province (n=200)	$236.02	$221.09	$211.91↓	$224.61

(↓ ↑= Direction of significant change p<.05)

- Again, estimates of monthly electrical bills tended to be highest in St. John's CMA in 2013 ($251.16).

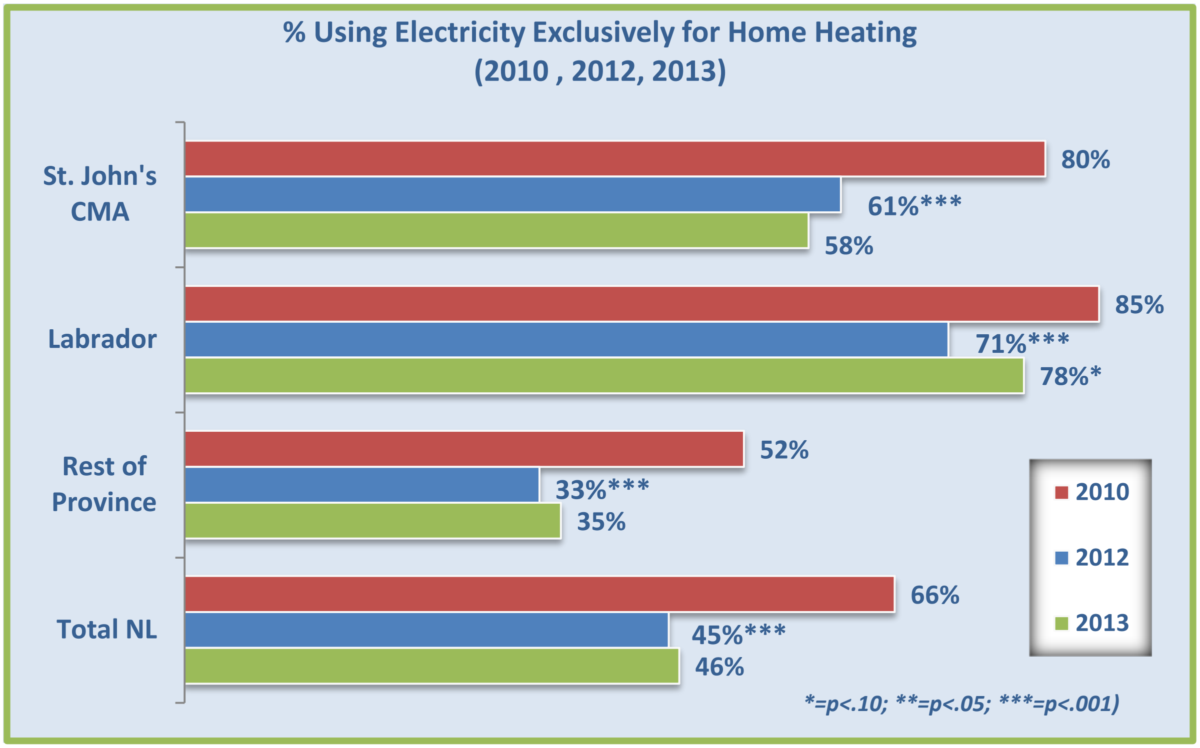
- On average, estimated costs were about 10% to 20% lower for households in Labrador ($199.69), despite heavy reliance on electricity for home heating in this area of the province. Even though these estimates are lower than elsewhere in the province in 2013, households in Labrador reported the highest average monthly electrical costs since the study was initiated in 2008.

- Average, monthly electric cost estimates for those living elsewhere in the province (ROP) fell between the other two regions ($224.61), although it should be noted that homes in this region were least likely to use electricity as a primary source for their home heating (48% versus St John's CMA: 70% & Labrador: 86%).

- When compared only for those using electricity as either a primary or secondary source of home heating, average monthly expenditures did not differ significantly between St. John's ($282.03) or Rest of Province ($271.40) but, again, were lower in Labrador ($210.08, p=.07).

2.3 Exclusive Use of Electric Home Heating

Figure 4: Percent Using Electricity Exclusively for Home Heating (2010 versus 2012, 2013)



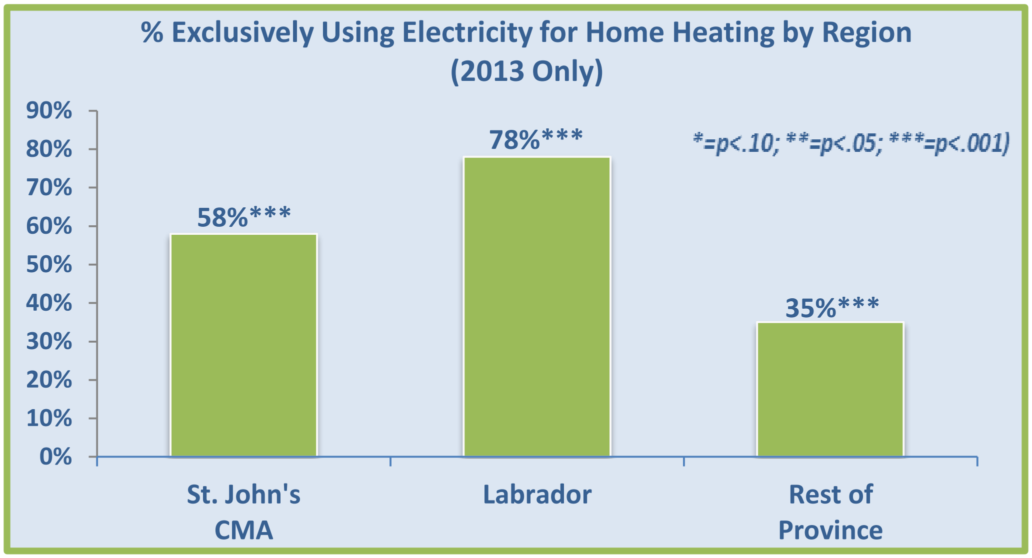
- The percent of households exclusively using electricity for home heating had dropped strongly from a high of 66% in 2010 to 45% in 2012 and has continued at this lower level in 2013 (46%).

- This means that in 2010, not only were there more homes using electricity for any home heating (70%), but the vast majority of these households (95%) were not using any other source to supplement their heating.

- In contrast, in 2013 fewer households were using electricity for any home heating (58%) and 77% did not use any other source.

- Last year, declines in exclusive use of electricity for home heating occurred in all three regions of the province. In 2013, the percent of households using only electricity increased significantly in Labrador (78% versus 71%) but remained steady elsewhere in the province.

Figure 5: Percent Using Electricity Exclusively for Home Heating by Region

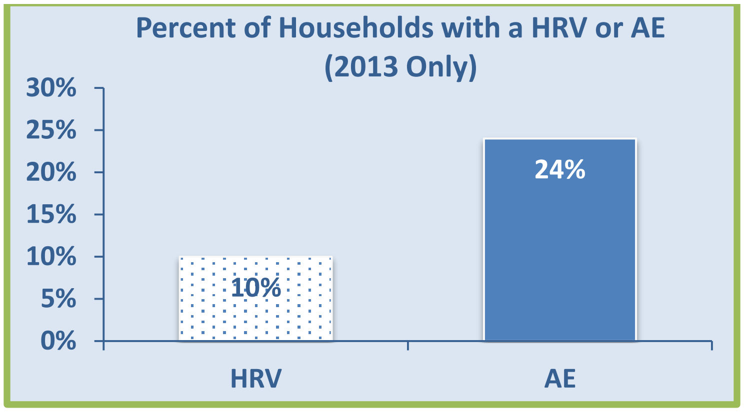


- Households in Labrador continue to be most likely to use electricity for 100% of their home heating (78%) whereas those living in Rest of Province were least likely to do so (35%).
- On average, in 2013, those exclusively using electricity for home heating spent over twice as much each month on electricity than other households (median= $300 versus $140).
- Again, when considered by region, average monthly expenditure by those exclusively using electricity for home heating living was significantly lower in Labrador ($213.77) compared to St.John's CMA ($294.83) and especially Rest of Province ($309.45) making electric home hearing costs more significant issues for electrically heated homes outside Labrador.

2.4 Use of Heat Recovery Ventilator (HRV) & Air Exchanger (AE)

In 2013 a series of new questions regarding use of heat recovery ventilators (HRVs) and air exchangers (AE) were added to the tracking survey. Respondents had only been asked about HRV use in the 2012 survey and evidence suggests that some respondents may have confused the two types of units including estimates for both in their responses. In 2013 the questions were broken out for each type of unit to clarify and improve reporting accuracy.

Figure 6: Percent with a Heat Recovery Ventilator (HRV) or Air Exchange (AE)



- When specifically asked about the two types of units, the rate of households reporting use of an air exchanger (AE) was over twice as high as those reporting use of a heat recovery ventilator (HRV) with only three respondents reporting they had both.
- Overall, about 10% of households in NL have an HRV with almost one in four (24%) reporting an air exchanger in the home.
- Previously, the rate of reported HRV use fell between these two estimates at 16% suggesting there may have been some confusion for residents regarding the type of unit they had installed when reporting last year. Otherwise there were no other significant differences observed.

Figure 7: Percent with a Heat Recovery Ventilator (HRV) or Air Exchange (AE) by Region

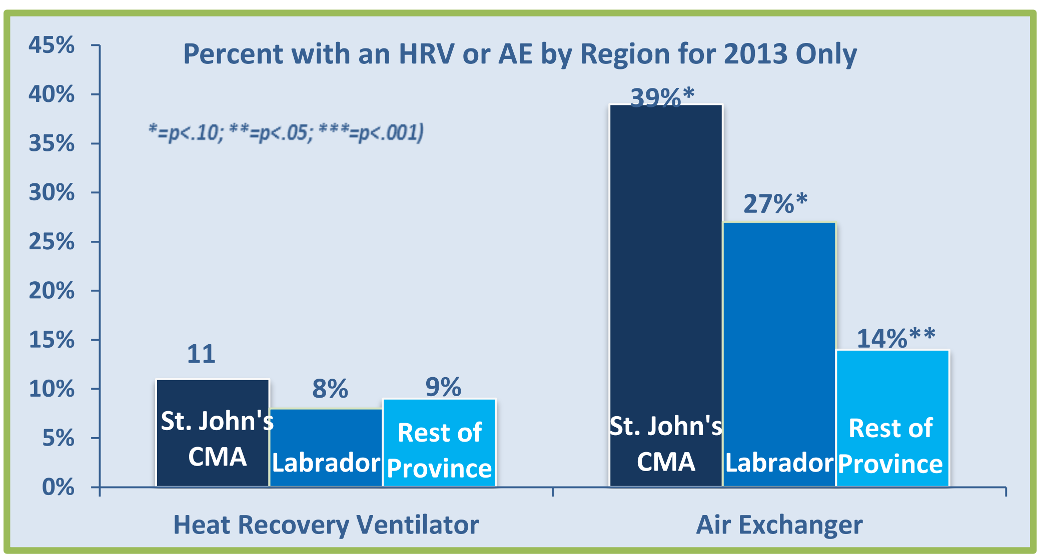
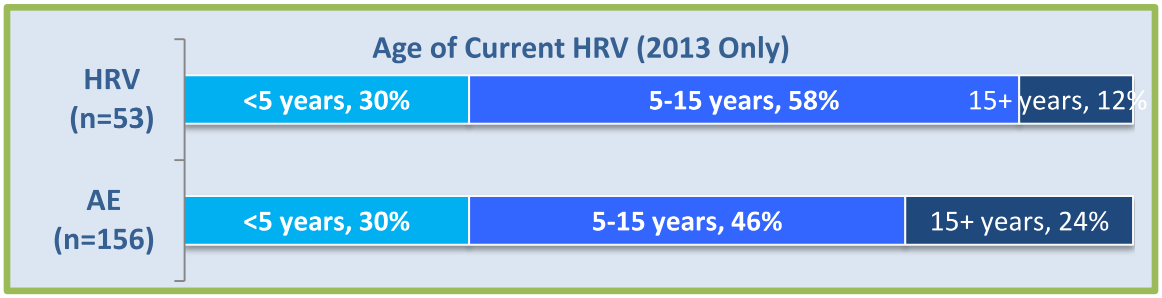


Figure 8: Age of Current HRV & AE (2013 Only)



Heat Recovery Ventilator (HRV)

- The use of HRV's was fairly similar across the province with about 8% to 11% of households in each region reporting they had a heat recovery ventilator installed.
- Most HRV's were purchased more than 5 years ago (70%) with 12% over 15 years old.
- For the most part, households tended to leave the HRV running continuously (66%) although 24% turned it off on occasion and 10% turned it off for several months.
- Most households with HRVs believed they had an energy efficient model installed (70%) although 13% were uncertain.
- About 13% of current HRV owners, representing about 1.3% of total households, are thinking about replacing a heat recovery ventilator sometime within the next 5 years.
- In the case of HRVs, all residents looking to replace their units over the next five years are very likely to install an energy efficient model.

Table 5: Use of Heat Recovery Ventilator (HRV)

Use of Heat Recovery Ventilator Among HRV Owners	St. John's (n=21 ▼)	Labrador (n=14▼)	RoP (n=18▼)	Total NL (n=53)
Current use of HRV:				
Always turned on	67%	50%	67%	66%
Turned off occasionally (short periods)	19%	14%	28%	24%
Turned off several months at a time	14%	36%	6%	10%
Currently using an energy efficient HRV:	**62%**	**57%**	**78%**	**70%**
Plans to Replace HRV within next 5 years:	**10%** (n=3ǂ)	**7%** (n=2ǂ)	**17%** (n=3ǂ)	**13%** (n=8ǂ)
Very likely to purchase an energy efficient HRV:	3	2	3	8

=p<.10; **p<.05; ***p<.001 ▼ *Treat with caution due to small sample sizes (n>10<30)*
ǂ Percentages suppressed due to small sample sizes (n<10). Only number of respondents reported (n)

Air Exchanger (AE)

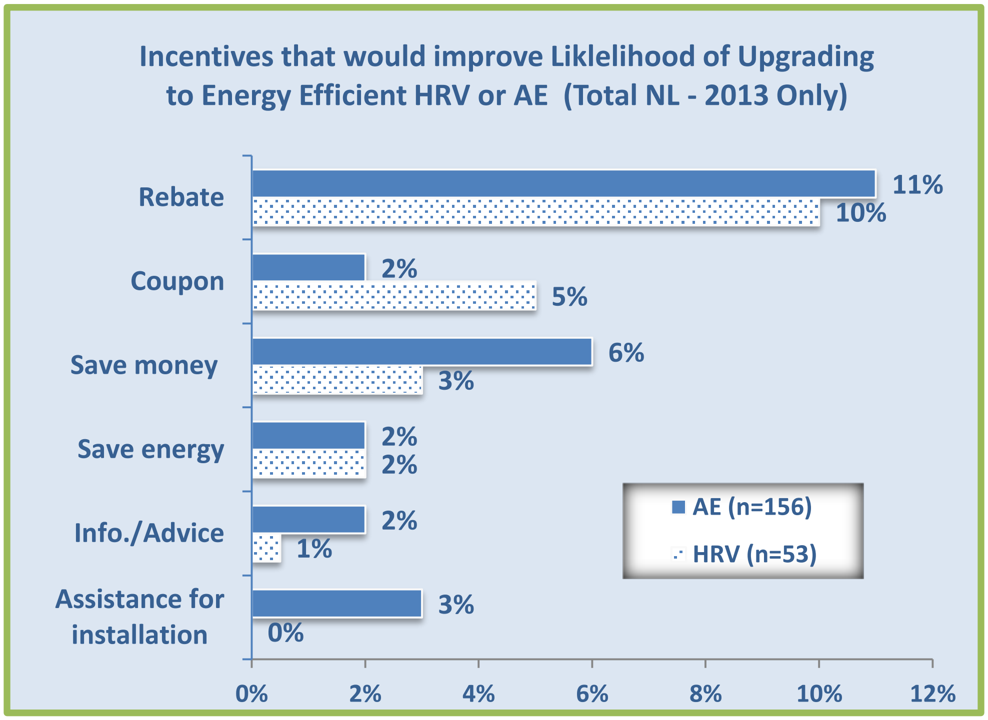
- In contrast, use of air exchangers varied strongly by region.
- The highest rate of air exchanger use was in St. John's CMA (39%), followed by Labrador (27%). Only 14% of households in the Rest of Newfoundland had an air exchanger.
- Air exchangers tended to be older than HRVs with one in four (24%) 15 years or older.
- Residents were less likely to leave the air exchanger running continuously (55%) with 29% turning it off on occasion and 16% turning it off for extended periods.
- There was greater uncertainty surrounding the type of air exchangers installed with only 56% thinking they had an energy efficient AE with one in four users unsure what type of model was used. This is consistent with the older age skew for AEs over HRVs.
- Although, AEs tended to be slightly older then the HRVs, a similar proportion are planning to replace their current unit (9%). This means that about 2.2% of households in NL are intending to replace an air exchanger at some time within the next 5 years with the vast majority (86%) expecting to purchase an energy efficient model.

Table 6: Use of Air Exchanger (AE)

Use of Air Exchanger Among AE Owners	St. John's (n=77)	Labrador (n=52)	RoP (n=27▼)	Total NL (n=156)
Current use of AE:				
Always turned on	57%	54%	52%	55%
Turned off occasionally (short periods)	32%	23%	22%	29%
Turned off several months at a time	10%	23%	26%	16%
Currently using an energy efficient AE:	**58%**	**52%**	**52%**	**56%**
Plans to Replace AE within next 5 year:				
Yes	13%	10%	0%	9%
Unsure	5%	2%	15%	8%
No	82%	88%	85%	83%
Likelihood of Purchasing energy efficient AE:	**18% (n=14▼)**	**12% (n=6ǂ)**	**15% (n=4ǂ)**	**17% (n=24▼)**
Very likely:	93%	4	3	87%
Somewhat likely	7%	2	0	6%
Not at all likely	0%	0	1	7%

**=p<.10; **p<.05; ***p<.001* ▼*Treat with caution due to small sample sizes (n>10<30)*
ǂ Percentages suppressed due to small sample sizes (n<10). Only number of respondents reported (n)

Figure 9: Reported Incentives for Upgrading to an Energy Efficient HRV or AE



- For both heat recovery ventilators (HRVs) and air exchangers (AEs), access to rebates was considered to be the most effective incentive for improving the likelihood they would purchase an energy efficient upgrade.
- Coupons were mentioned more often by those with HRVs while those with air exchangers were more inclined to value the ability to save money (6%) and to get assistance in installing the product.
- The only regional difference was a greater tendency for those living in the Rest of Province, that is, outside of St. John’s and Labrador, to be seeking assistance for product installation. Given the older age of those living in this region it would seem that installation assistance would be helpful in supporting upgrades.

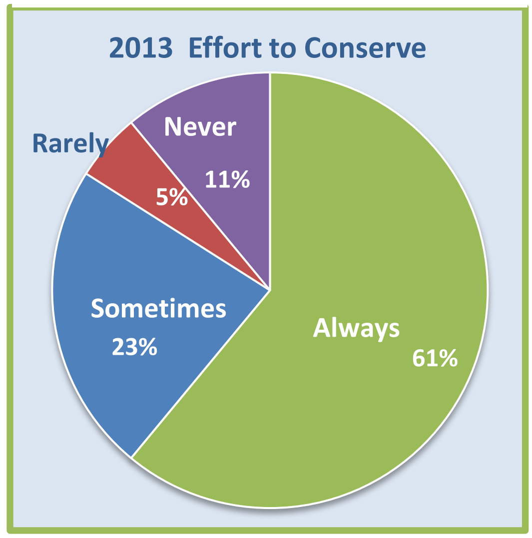
2.5 Home Energy Conservation

Table 7: Frequency of Making Efforts to Conserve Energy 2012 vs. 2013

Frequency of Making Effort to Conserve Energy	2012	2013
Always	63%	61%
Sometimes	21%	23%
Rarely	6%	5%
Never	11%	11%

**=p<.10; **p<.05; ***p<.001*

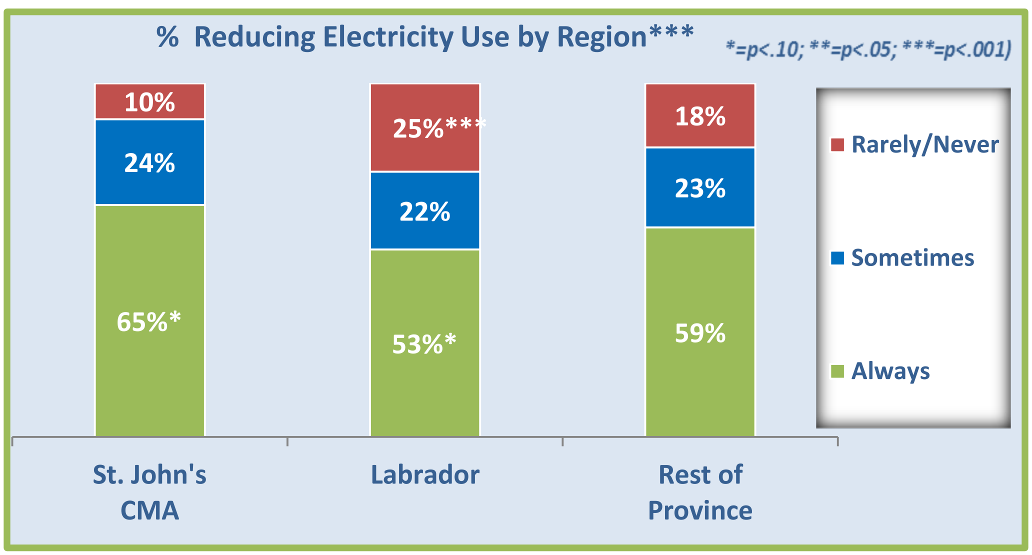
Figure 10: 2013 Frequency of Households Making Effort to Conserve Energy



- In 2013, most households in NL (84%) at least sometimes make an effort to reduce their home electricity use with 61% doing so on a regular consistent basis.

- Compared to last year, there has been no change in the degree of effort made to cut back on electrical use. In fact, figures have remained stable following the drop from 81% in 2010 to 63% in 2012.

Figure 11: Frequency of Reducing Home Electricity Use by Region (2013)



- Residents in St. John’s CMA tended to be most conscientious in their conservation efforts especially compared to those living in Labrador (65% versus 53%).

- Although, Labradoreans continue to be less likely to conserve than those living elsewhere in NL (75% versus St. John's CMA: 90% 7 ROP: 82%), the majority of households in all markets in NL make some kind of effort to conserve electrical use.

- For about 16% of NL residents, home electricity conservation is rarely or never considered especially in Labrador (25%) and on the island outside of St. John's CMA (18%), suggesting these may be key areas to target for improvement.

- Those least likely to conserve were more likely to fall in the following demographic groups:

    - Men (14%) versus women (8%);

    - Residents over 65 years (17% versus 7%) who on average also tend to live in older homes (45 years) versus 23 years or less for those under 50 years of age and 32 years for those aged 55 to 64 years;

    - Those with lower educations primarily high school or less (17%) compared to only 3% among those with post-secondary educations;

    - Lower income households especially those reporting incomes under $30,000 per year (20%) as compared to those with incomes over $60,000 (6%);

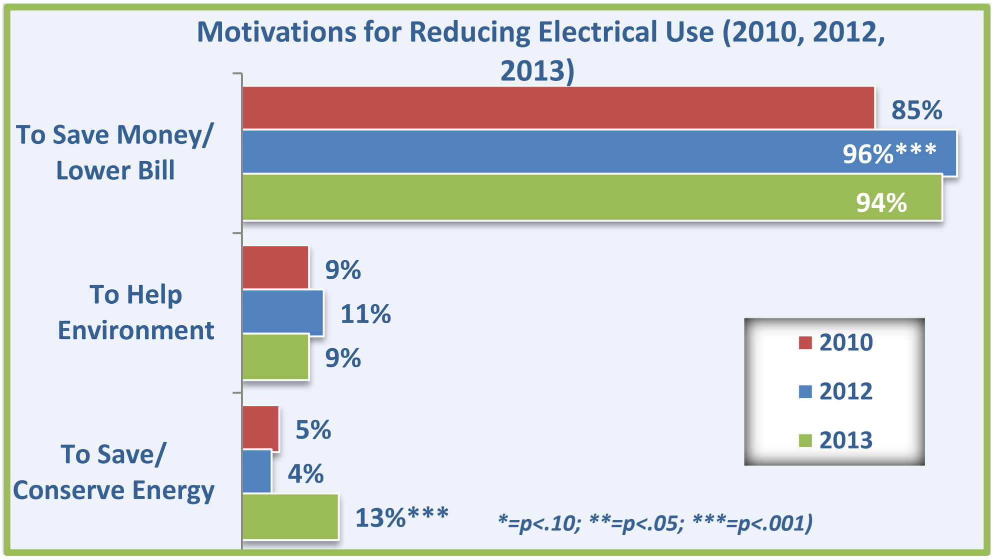
    - Those who do not have children living in the household (13% versus 4%);

    - Those who are either single/ never married (19%) or widowed (26%) compared to those living with a spouse or partner (8%).

2.6 Reasons for Conserving Electricity

Those households engaged in any conservation effort (either sometimes or always making efforts to conserve) were asked, unaided, why they were trying to reduce their electrical use.

Figure 12: Motivations for Reducing Electrical Use (2010, 2012, 2013)



- Regardless of where residents live, the primary motivation for trying to cut back on electric use continues to be *'to save money and/or lower their bill'* (94%). This represented a significant increase in the number of households motivated to conserve to save money as compared to 85% in 2010.
- Therefore, in 2012 & 2013, although the percent of households involved in active conservation is lower than was the case in 2010 ,among those who were trying to cut back 'saving money and lowering their energy bill' continued to be a key driver especially in St. John's (95%) and Rest of Province (95%) versus 86% in Labrador.
- There were 9% motivated to cut back '*to help the environment*', especially in Labrador (15%) as compared to the Rest of Province outside of St. John's where only 8% cited the environment as playing a key role in supporting any reduction efforts.
- In 2013, the percent cutting back on their electrical use specifically '*to save or conserve energy'* increased significantly in all three areas with 13% mentioning general energy conservation as a motivating factor, a rate three times higher than was the case previously. This shift means that in 2013 there were more residents looking to manage their electric use to conserve energy as opposed to helping the environment.
- This shift was consistent with adverting messaging for the takeCHARGE program.

Table 8: Main Reason for Conserving Electricity by Region (2012 versus 2013)

Main Reason for Conserving Energy (2012 versus 2013)	St. John's CMA (n=200)	Labrador (n=200)	ROP (n=200)	Total NL (n=600)
Save Money				
2012	95%	91%	96%	96%
2013	95%	86%***	95%	94%
Help Environment				
2012	20%	15%	5%***	11%
2013	↓10%	15%**	8%**	9%
Save/Conserve Energy				
2012	3%	6%	5%	4%
2013	↑13%	↑18%*	↑12%*	↑13%

**=p<.10; **p<.05; ***p<.001 between Areas*
↓ ↑= Direction of significant change p<.10 from 2012 to 2013

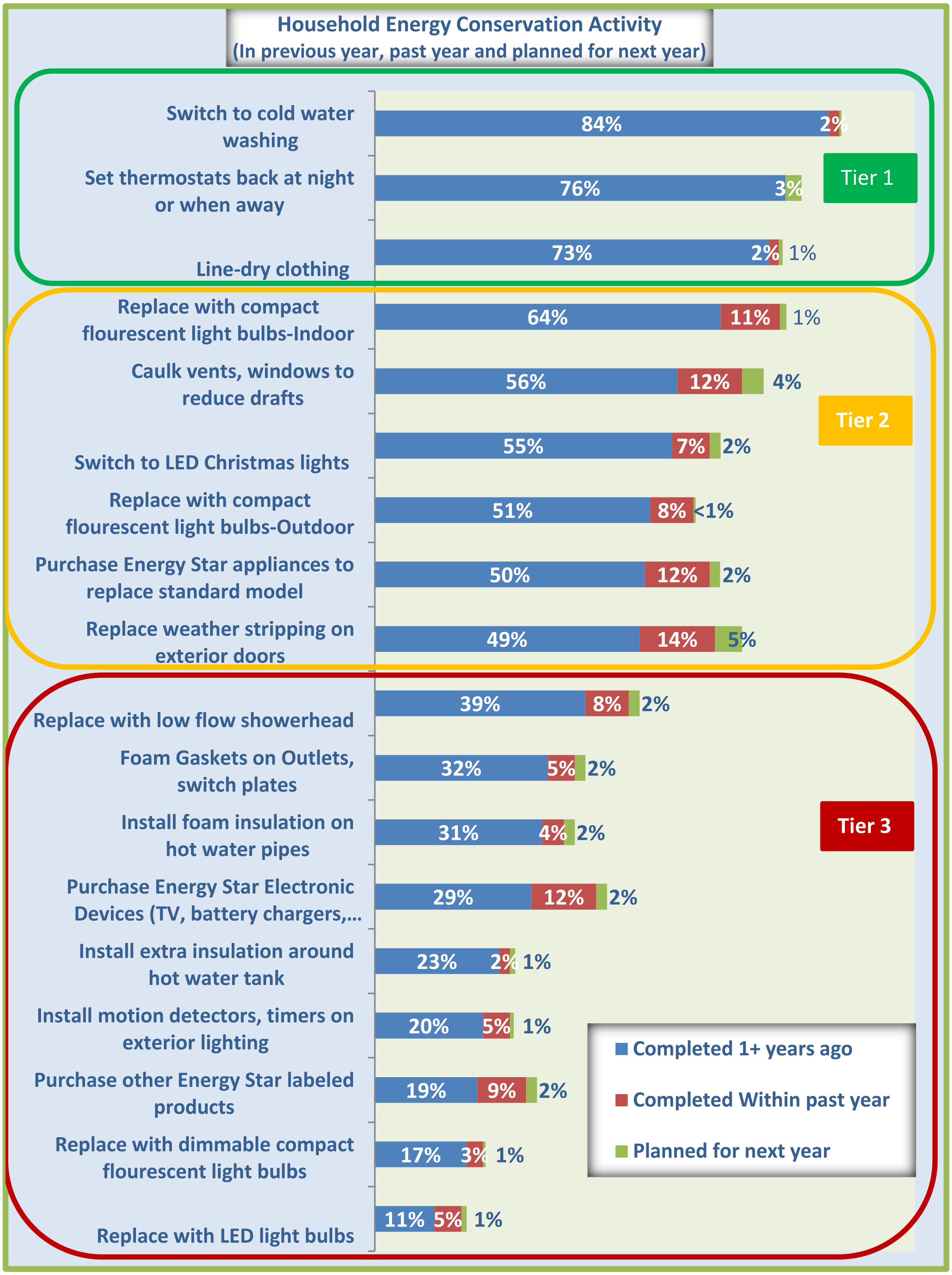
2.7 Changes in Home Energy Use

To gain insight about the potential impact of promotional efforts encouraging home energy conservation and supporting readiness to change, those taking part in the survey were asked a series of questions about various household initiatives. For 18 different conservation activities respondents reported whether or not their household had made this change more than one year ago (Maintenance Stage), had made the change within the past 12 months (Action Stage) or are planning to make this conservation change within the next 12 months (Preparation Stage). Residents who had not made any plans were further asked if they had potential interest in this change in the future (Contemplation Stage) or had not thought about this particular option (Pre-Contemplation Stage).[4]

[4] Definition of Stages of Change (Readiness to Change): 'Stages of Change' is a key component of the Transtheoretical Model of behaviour change (TTM) (Prochaska, DiClemente & Norcross, 1992) that considers behavioral change to be part of a process that occurs over time progressing through a series of five stages: Precontemplation, Contemplation, Preparation, Action, and Maintenance. This model is used widely in the area of health promotion, in particular to predict successful strategies for people in extinguishing unhealthy practices but it has been applied to many other types of behaviours. In this case the 'precontemplation' stage includes those households that are not considering taking action at this time, the 'contemplation' stage includes those who interested and willing to consider taking action but not within the next 12 months, the 'preparation' stage includes those who 'intend to take action and are making plans to move forward within the next 12 months, the 'action' stage includes those who have taken action within the last 12 months, and the 'maintenance' stage includes those who had taken action more than 12 months ago. The goal is to match resources and support to each of the stages of changes in order to continue to help move people forward in extinguishing undesirable behaviours and adopting more healthy or desirable activities/behaviours, in this case responsible energy use and conservation.

Prochaska JO, DiClemente CC, Norcross JC. In search of how people change. Am Psychol 1992; 47:1102-4

Figure 13: Household Energy Conservation Activity by Stages of Change



- In 2013, more than one year ago, 98% of households in NL had undertaken at least one of the 18 energy conservation activities measured to try to reduce their home energy use.

- Similar to last year, on average, households had adopted 8 different practices intended to help cut back their electrical use at some time in the past.

- There were 45% of households who introduced at least one conservation change in the past year which was significantly lower than conservation activity during the same period in 2012 (51%).

- However, the percent of households planning to introduce additional changes within the next 12 months (21%) or at some time in the future (21%) has remained constant.

- There were virtually no significant changes observed in the percent of conservation activities completed more than 1 year ago.

- As noted in 2012, early efforts to reduce electric use consisted of low-risk, low-cost activities such as switching to cold water washing (84%), setting the thermostats down at night or when away from home (76%), hanging clothes to dry out on the line rather than using the dryer (73%). This represents Tier 1 'low hanging fruit' with the majority of households in all regions having adopted these changes more than a year ago.

- The next tier of changes was introduced by about one half to two-thirds of all households more than one year ago and required a bit more cost and work on the part of the household. For example, replacing standard indoor light bulbs with compact fluorescent lights (64%), switching to LED Christmas lights (55%), caulking vents, windows and doors to reduce drafts (56%) and replacing weather stripping on exterior doors (49%).

- While most households had made these changes more than 1 year ago, there continued to be relatively strong activity in these Tier 2 areas over the past 12 months although the rates of involvement are not as high as in 2012 especially for caulking (12% versus 18%) & weather stripping (14% versus 24%) although 11% continued to replace their standard lights with new compact fluorescent versions.

- Over the past year the number of households in NL engaged in these Tier 2 conservation activities has increased bringing overall participation rates for households across NL up to the level observed for the Tier 1 activities noted above.

- For more cost intensive investments such as energy efficient appliances it appears that households are now starting to acquire these items as older models come up for replacement. The number of households acquiring at least one energy efficient "Energy Star' appliance has increased from 57% in 2012 to 62% in 2013 with 12% making such purchases within the past 12 months.

- Adoption of other 'Energy Star' labeled products has also increased moving from 26% of households in 2012 to 41% in 2013 with 12% of households in NL making a conscious choice to buy more energy friendly items over the past year.

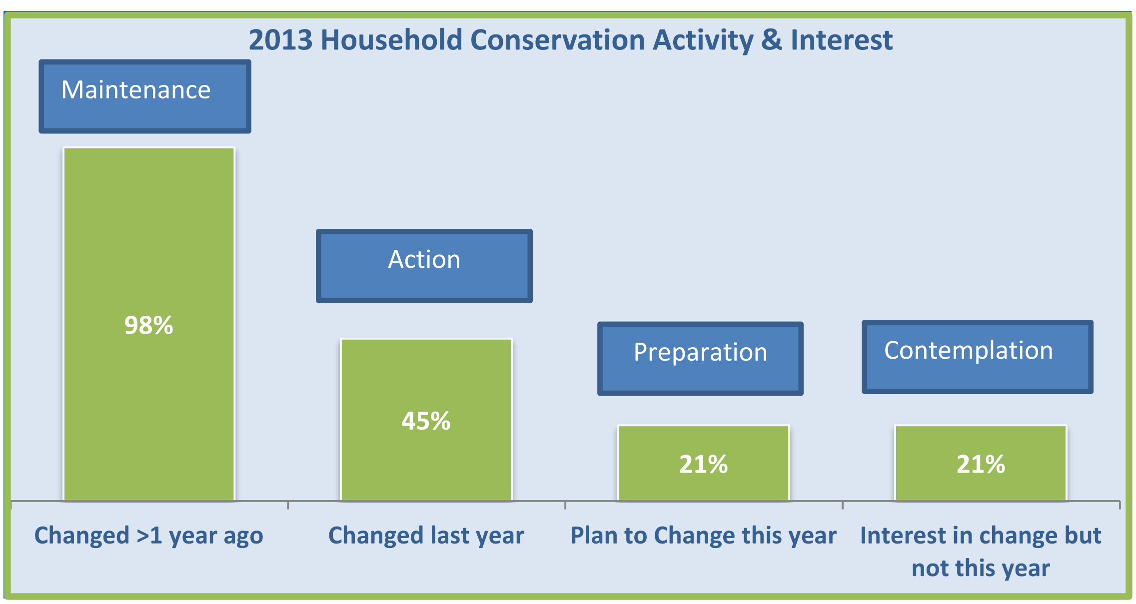
- In fact, purchasing of energy star appliance and products, caulking vents and windows, adding weather stripping, and light-bulb replacement accounted for most of the past year conservation activity and the majority of planned activity.

- Not surprisingly, up-take of the more labor, skill intensive, and/or cost intensive upgrades continues to be slower with little to no change in the number of households engaged in this type of activity.

2.8 Interest in Changes to Reduce Home Energy Use

- As noted last year, promotional support and conservation strategies have been effective in moving NL households forward in terms of making energy efficient changes and sustaining interest in making further changes. Almost all households in NL have adopted a number of low risk energy conservation practices.

Figure 14: Current Profile of Household Conservation Activity and Interest



- However, over the past year significantly fewer households fell into the 'action' category (45% versus 51%), suggesting that converting interest to action may require greater consumer engagement and/or support.

- About one in five households are planning to make some type of energy conservation changes over the next year primarily weather stripping and caulking activity although intent to purchase energy star appliances, devices & other products was noted by about one-third of these residents. Foam insulation on hot water pipes and foam gaskets on outlet plates also generated future interest for about 1 in 10 households intending to take action.

- Other energy efficient changes made over the past year included replacement of windows (4%), doors (3%), and insulating walls (3%), basements (4%) & attics (1%). Primary reasons for making these changes was to save money (54%), reduce energy use (44%), to improve home comfort (27%) and because of rebates (11%).

2.9 Opportunities to Support Change

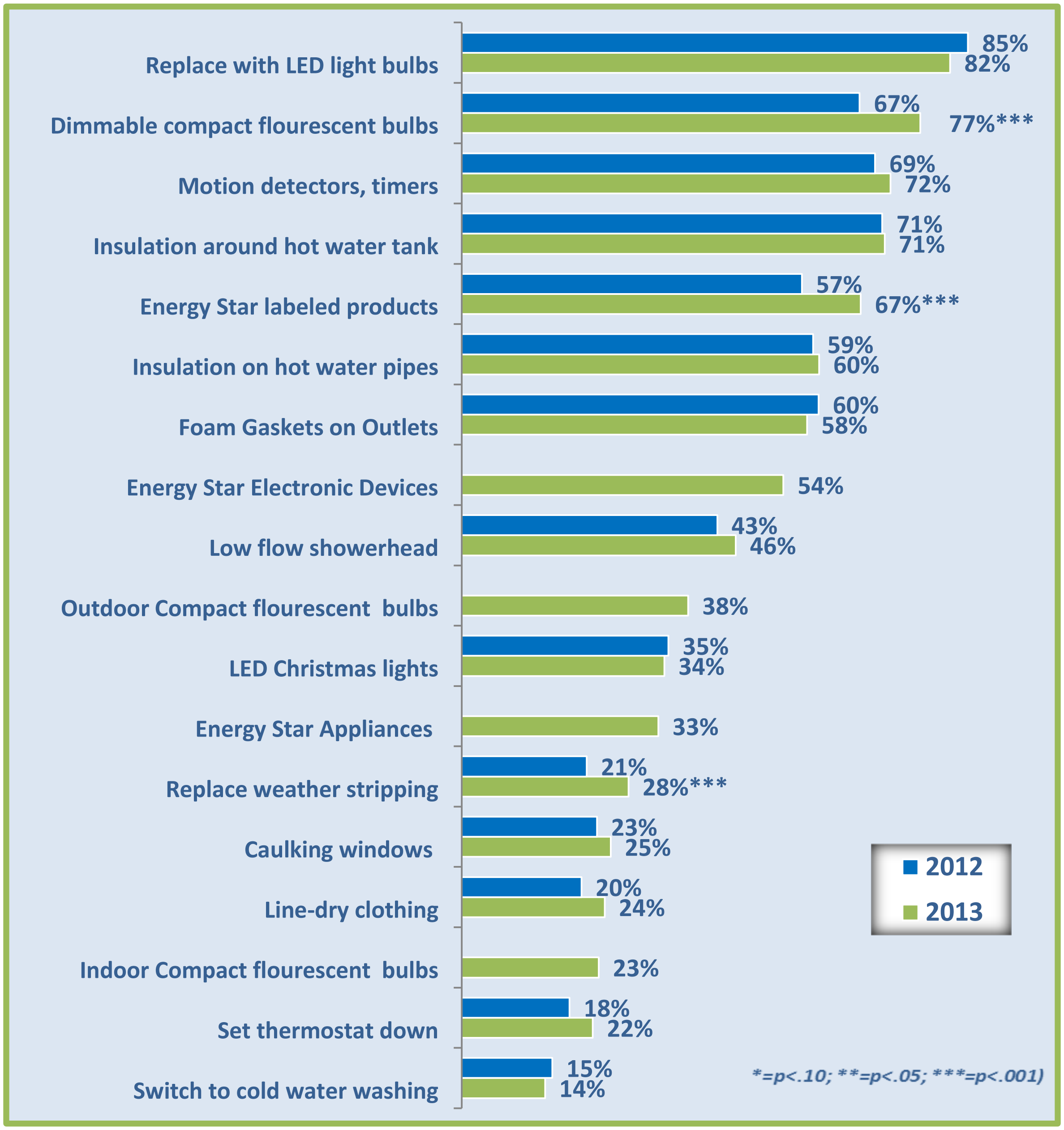
It would seem that there are a lot of conservation options that households have not thought about primarily because they don't understand the advantages, benefits or personal relevance of the option.

- Lower adoption rates for certain initiatives are largely due to the fact that households have not thought about making these changes rather than outright rejection, suggesting awareness, education and accessibility represent opportunities for supporting up-take of many initiatives.

- This is especially true for switching to LED lighting or using dimmable compact fluorescent bulbs, installing timers or motion detectors, insulating hot water tanks, installing foam gaskets on outlets and for use of Energy Star products & devices outside of appliance purchases.

- For use of dimmable fluorescent lights, use of Energy Star products beyond appliances, and the use of weather stripping the percent of households who have not considered these conservation activities has actually increased significantly.

Figure 15: Percent of Households Who Have Not Thought About Specific Initiatives (Pre-Contemplation: 2012 versus 2013)



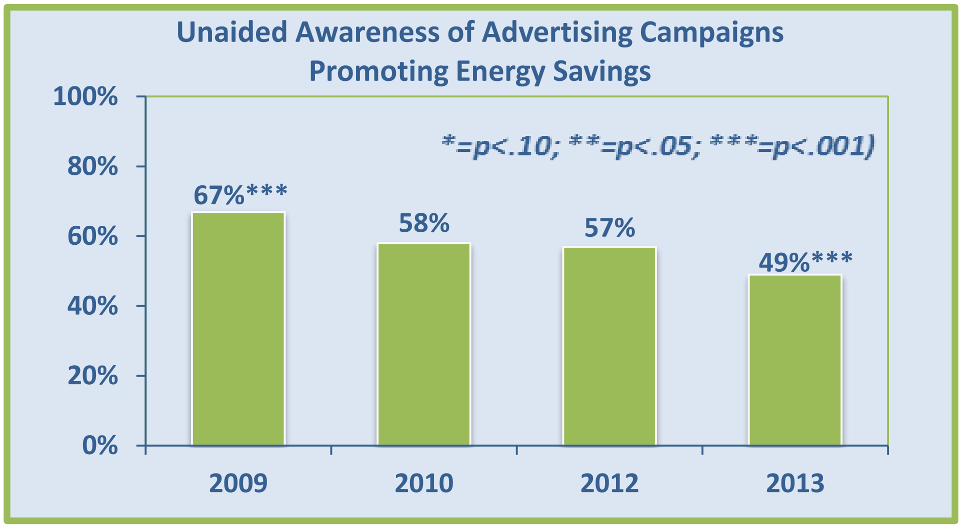
2.10 Top-of-Mind Awareness for Advertising Promoting Energy Savings

All participants were asked if they were aware of any advertising campaigns in Newfoundland and Labrador promoting energy saving products and tips to save energy. For those recalling such adversiting respondents were further questioned as to the name of the campaign.

- Unaided, top-of-mind recall of any advertising promoting energy tips and savings in NL declined significantly over the past year moving from 57% in 2012 to 49% in 2013.

❖ Given previous declines, spontaneous recall of the advertising has dropped by about 27% since 2009.

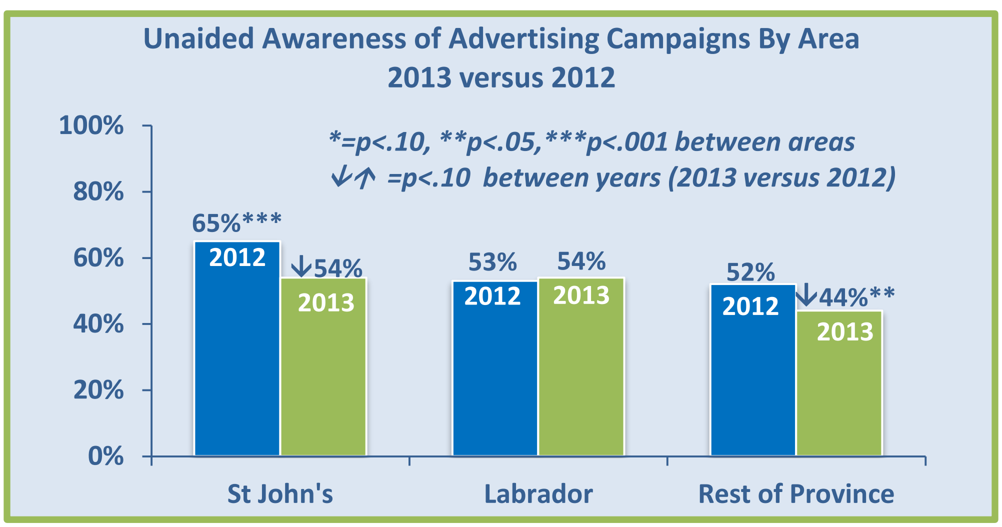
Figure 16: Top-of-Mind Awareness of Energy Savings Advertising Campaign



❖ Over the past year, the drop in awareness was attributable to lower recall in St. John's CMA (54% versus 65%) and the Rest of Province (44% versus 52%) whereas awareness levels remained stable in Labrador at 54%.

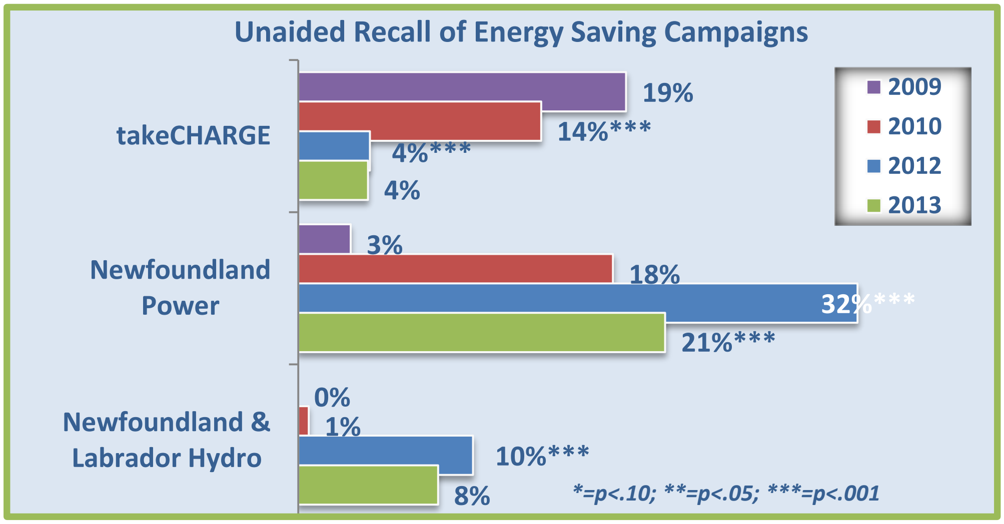
❖ As a result, there is no longer any difference in top-of-mind advertising awareness between St. John's CMA and Labrador, both of which exceeded recall among households in Rest of Province (54% versus 44%).

Figure 17: Top-of-Mind Awareness of Energy Saving Adverting Campaigns



- In 2009, almost one in every five people (19%) surveyed had top-of-mind awareness of the takeCHARGE campaign. This level of recall had declined to 14% in 2010 and hit a low of 4% in 2012 where it remains in 2013.

Figure 18: Top-of-Mind Recall of Energy Saving Campaigns



- Unaided recall of energy savings tips and promotion continues to be primarily linked to Newfoundland Power (21%) or Newfoundland and Labrador Hydro (8%).

- However, compared to 2012, in 2013 the percent of households attributing energy conservation advertising to Newfoundland Power has dropped from a high of about one-third (32%) to recall by about one in five households (21%). There was no significant change observed in top-of-mind brand linkage for Newfoundland and Labrador Hydro.

Table 9: Unaided Recall of Sponsoring Agency by Region (2013)

Unaided Recall of Sponsoring Agency for Advertising (2013 Only)				
	St. John's (n=200)	Labrador (n=200)	ROP (n=200)	Total NL (n=600)
NL Power	↓ 29%***	↓ 1%***	↓ 18%**	**↓ 21%**
NL Hydro	6%	30%***	7%	**8%**
takeCHARGE	5%	5%	4%	**4%**
Provincial Gov't	2%	2%	<1%	**<1%**
Energy Saver's Rebate	3%	3%	3%	**3%**
Turn Back the Tide	---	1%	1%	**<1%**
Federal Gov't	<1%	---	<1%	**<1%**

**=p<.10; **p<.05; ***p<.001   ↓ ↑= Direction of significant change p<10 from 2012 to 2013*

- In St. John's CMA, association of energy savings advertising with Newfoundland Power dropped strongly from 42% to 29% in 2013. This decline was also evident in Rest of Province (28% to 18%).

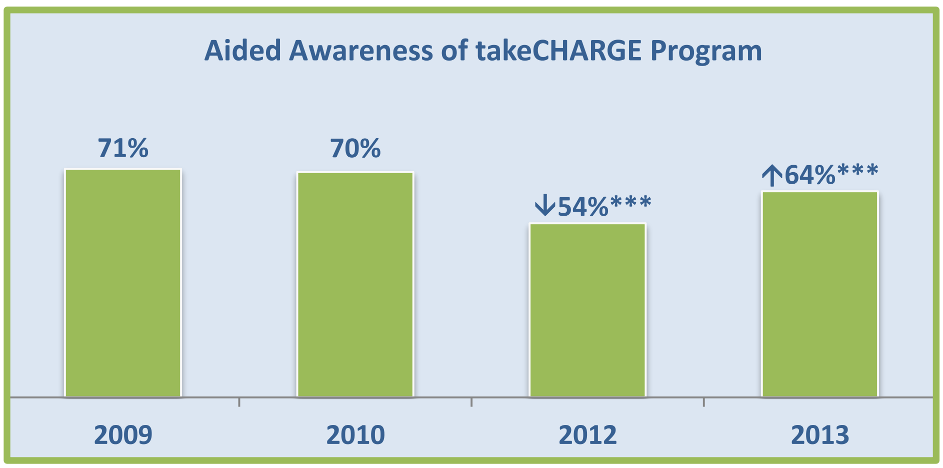
- In contrast, one in every four households in Labrador in 2012 attributed energy savings advertising to NL Hydro (25%) and this climbed slightly to 30% in 2013.

- Top-of-mind recall of takeCHARGE remained constant in 2013 with about 4-5% in each market specifically mentioning the takeCHARGE campaign without prompting.

2.11 Awareness of the takeCHARGE Energy Saving Campaign

Respondents were specifically questioned regarding Newfoundland Power and Newfoundland and Labrador Hydro's energy saving campaign called takeCharge to determine if they had ever heard of the program, had been exposed to any program promotion in the past year, and, if so, where they recalled seeing the information.

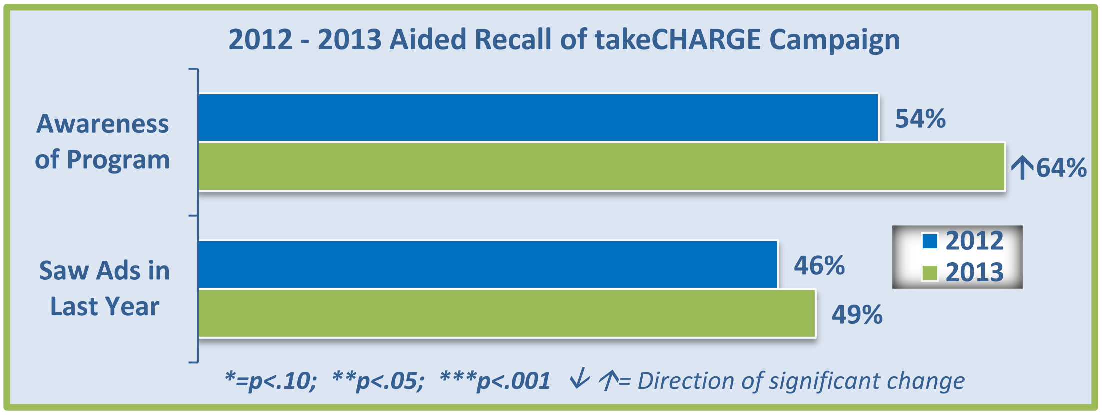
Figure 19: Aided Awareness of takeCHARGE Program



- While top-of-mind awareness of the takeCHARGE campaign had not changed over the past year, aided awareness increased significantly in 2013. When specifically prompted for recall of 'Newfoundland Power's and NL Hydro's energy saving campaign called takeCHARGE' 64% of participating households were aware of the program in 2013 as compared to 54% in the previous year.

- Familiarity with takeCHARGE is still slightly lower than was the case in 2009 to 2010 when about 70% of households recognized the program but there has been has been improvement over the past 12 months with aided recall moving from just over half (54%) to almost two-thirds (64%) of households.

Figure 20: Aided Recall of takeCHARGE Campaign



- Program awareness was significantly higher in St. John's CMA (70%) and Labrador (70%) than in the Rest of Province (60%) although there were significant gains in all markets over last year.

- Almost half of households (49%) reported seeing or hearing anything about the takeCHARGE program in the last year with just over half of these respondents (27% of all respondents) citing exposure through more than one source.

Table 10: Source of Campaign Awareness (2013)

% of Households citing each Source of Awareness (2013 Only)	St. John's (n=200)	Labrador (n=200)	ROP (n=200)	Total NL (n=600)
Television	36%	36%	30%	**32%**
Bill Inserts	27%	33%*	25%*	**26%**
Newspaper	8%	10%	4%*	**6%**
Radio	4%	↑4%	5%	**5%**
Building Supply or Retail Store	2%	5%	5%	**4%**
Online	4%	3%	2%	**3%**
Word of Mouth	3%	4%	3%	**3%**
Website	1%	3%	3%	**2%**
Magazine	1%	2%	2%	**1%**
Trade Show/display	2%	2%	1%	**1%**
Facebook	0%	1%	2%	**1%**
Billboard	1%	4%	0%	**1%**
Social Media	0.5%	0%	0.5%	**0%**

*=p<.10; **p<.05; ***p<.001 ↓ ↑= Direction of significant change p<.10 from 2012 to 2013

- As was the case in 2012, program awareness over the past year again was primarily through television ads (32%) and bill inserts (26%). These two methods combined accounted for 91% of all program awareness continuing to position these sources as the dominant mediums for reaching those currently aware of the program.
- Bill inserts tended to be mentioned more often by those living in Labrador (33%) than by those living outside of St. John's CMA in the Rest of the Province (25%).
- About one in every 16 respondents (6%) recalled reading about the takeCHARGE program in the newspaper at some time over the past year, with reported exposure through the newspaper at least twice as high in St. John's CMA (8%) and Labrador (10%) than in the Rest of Province (4%).
- The percent citing exposure to the takeCHARGE program through the radio increased over the past year in Labrador (2012:1% versus 2013: 4%) so that there is no longer any difference in program awareness due to radio advertising among the three regions with about 4-5% in each area recalling radio ads about the program in the past year.
- Building supply stores were mentioned by a similar proportion (4%) as providing information on takeCHARGE especially in Labrador (5%) and outside the St. John region (5%).
- Although there are still few households (3% or less) spontaneously mentioning exposure to the campaign through other sources such as online advertising (3%), the website (2%) or Facebook (1%) there is preliminary evidence that greater reach was achieved using these online mediums. In fact, the percent reporting any online exposure to the program doubled in Labrador (6.7% versus 2.9%) and ROP (6.5% versus 2.0%) so that exposure rates through Facebook, the website and online advertising combined are now similar in all regions of NL with a reach of approximately 6% over the past year.
- In 2013, online mediums accounted for 40% of those who were not reached by the TV or bill inserts as compared to 28% in 2012 suggesting there has been some growth in the impact of these sources for the program.
- Overall for the 9% of residents that were reached by alternative sources (other than TV or bill inserts), newspapers (26%), online advertising (24%) a building supply retailer (22%) and the takeCHARGE website (17%) were mentioned most often as a past year source of program awareness.

2.12 Awareness & Use of takeCHARGE Website & Facebook

Respondents were asked a series of questions regarding their awareness and use of the takeCHARGE website and Facebook page. In 2013 the questions were modified by the client team to assess regularity of visiting the site and when they had last visited the site.

takeCHARGE Website Awareness & Use

Table 11: Awareness % & Use of takeCHARGE's Website (2013)

Awareness & Use of takeCHARGE's Website (2013 Only)	St. John's CMA (n=200)	Labrador (n=200)	Rest of Province (n=200)	Total NL (n=600)
Awareness of Website	28%	25%	↑22%	**↑25%**
Ever Visited Website	*10%*	*11%*	*9%*	***9%***
Visited in last year	↓*5%*	*10%*	*7%*	***7%***

****=p<.10; **p<.05; ***p<.001*** *↓ ↑= Direction of significant change p<.10 from 2012 to 2013*

- In 2013, when prompted, almost one in every four residents (25%) was aware that the takeCHARGE program had a website offering information on energy savings, tips and rebates. This represented a significant increase over awareness levels in 2012 when 19% were familiar with the site.

- The improvement was entirely due to an increase in awareness among Rest of Province households. Since 2012, the knowledge of the website among those living on the island outside of the St. John's CMA has jumped from 13% to 22% in 2013. Previously, those living in the Rest of Province were least likely to know about the takeCHARGE website (2012 ROP: 13% versus St. John's: 28% & Labrador: 24%) and in 2013 there is no longer any difference in awareness among the three regions suggesting efforts since the last survey were successful in building awareness in this region.

- Although awareness had increased over the past year, the percent having ever visited the website (9%) or visiting the site in the last year (7%) remained fairly constant. Again, there is no longer any difference in site visits between the three provincial regions.

- Converting increased awareness into site visits will be the next challenge as currently only about 26% of those who are aware of the takeCHARGE website have visited it in the past year.

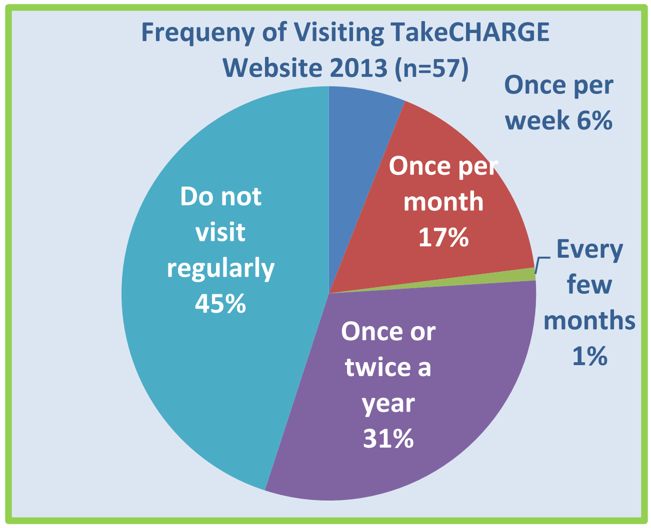
- Among all those who have ever visited the site, three-quarters (75%) did so within the past 12 months suggesting that once residents try the website they are very likely to revisit. Incentives or inducements for going to the site might be effective in eliciting trial among those who have not yet acted in going to the website.

- It is noteworthy that among those who had visited the site in the past year very few took up regular use of the site.

- The majority of site visitors (77%) were non-regular (45%) or only went once or twice a year (31%) or every few months (1%).

- Just one in four site visitors went back to the site once a month or more. It might be helpful to determine what is motivating regular site visits for this 1.6% of Newfoundlanders and Labradoreans who are visiting the website at least once a month.

Figure 21: Frequency of Visiting the TakeCHARGE Website 2013 among those Aware of the Site (n=57)



- Regardless, it would appear that finding ways to stay engaged with the client through the website on a more regular monthly basis offers potential for more in-depth communication. For example, linking monthly online bill payment or online account management to the takeCHARGE site with appropriate incentives (e.g., coupons or other consumer tips or activities) may encourage wider consumer relevance and use of the site.

takeCHARGE Facebook Awareness & Use

Table 12: Awareness % & Use of takeCHARGE's Facebook (2013)

Awareness & Use of takeCHARGE's Facebook (2013 Only)				
	St. John's CMA (n=200)	Labrador (n=200)	Rest of Province (n=200)	Total NL (n=600)
Awareness of FaceBook	6%	9%	↑9%	**↑8%**
Ever Visited FaceBook	*1%*	*2%*	*3%*	*2%*
Visited in last year	*1%*	*1%*	*3%*	*2%*

=p<.10; **p<.05; ***p<.001 ↓ ↑*= Direction of significant change p<.10 from 2012 to 2013*

- Awareness of takeCHARGE's Facebook is lower compared to awareness of the website with only 8% recognizing this resource. However, again, this is a significant improvement over awareness levels in 2012 when only 5% of residents knew about the Facebook site.

- In contrast to previous years, increased awareness and online activity by those living outside St. John's CMA and Labrador is driving much of the improvement observed with awareness of the takeCHARGE Facebook page in Rest of Province increasing from 2% in 2012 to 9% over the past 12 months.

- Despite improvements in awareness there has been no change in the percent visiting the page with about 2% going to the page at some time over the past year. This means that similar to results for the website, only about one in four (25%) of those aware of the Facebook page for takeCHARGE have acted on this knowledge and actually visited the page.

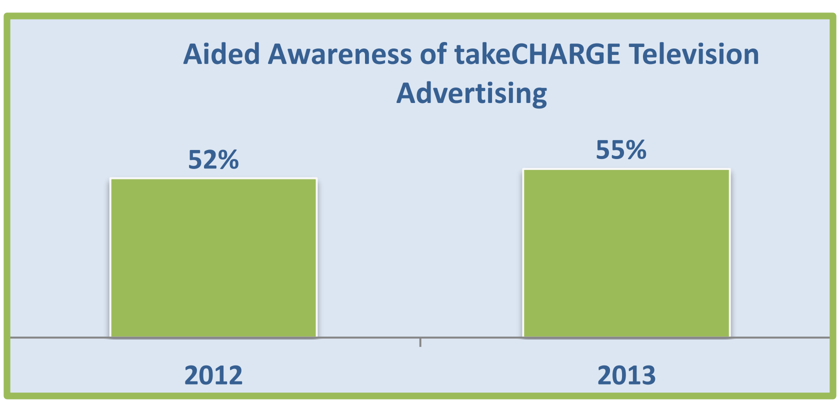
- Almost all of those who have ever been to takeCHARGE'S Facebook page last visited during the past year. Sample sizes were too small to profile site visitors.

- It will be important to capitalize upon this newly stimulated interest by those living on the island outside of St. John's CMA by ensuring the site is relevant for diverse users across the province.

2.13 Awareness of the takeCHARGE TV Advertising

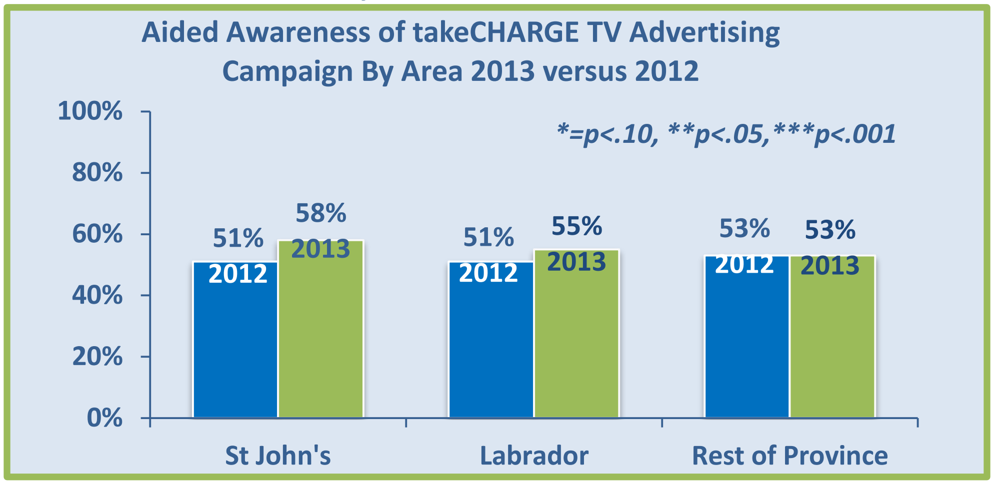
To assess aided recall for the takeCHARGE TV ad, in the 2012 & 2013 survey all respondents were read a description of the ad regardless of whether or not they had previously reported exposure to any campaign television advertising. This was undertaken to ensure respondents were referring to the specific ad in question: "Do you recall a TV ad where you see talking thermostats, windows, and insulation sitting in a director's chair on a TV set?'.

Figure 22: Aided Awareness of takeCHARGE Television Advertising (2013)



- In 2013, there have been no significant changes in the percent of residents recalling the TV ads. Just over half of all participating residents in NL recalled seeing the takeCHARGE TV ad and there were no differences observed in any of the regions.

Figure 23: Aided Awareness of takeCHARGE TV Advertising Campaign By Area 2013 versus 2012



- The main message among viewers was that "*there are things you can do to help reduce your energy use*" (44%) and that "*insulation can save you money or reduce your electrical costs*" (41%).

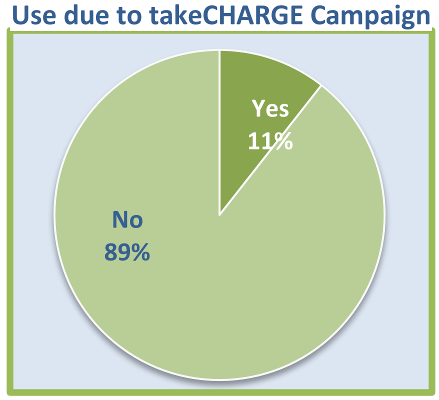
- Households outside of St. John's and Labrador were less likely to feel the ads were reinforcing the idea that there are things you can do to save money suggesting that the messaging may have to be tailored to meet the needs of different consumers throughout the province.

- There were 11% in all areas who also noted the television ad provided useful tips and ideas for helping you to conserve energy and save money.

2.14 Reductions in Electricity Use as a Result of the takeCHARGE Campaign

- Identical to results last year, 11% of respondents reported the ad had a direct impact in reducing their use of electricity and there were no significant differences among the three areas. This meant that about one in five who saw the ad (19%) was motivated to make energy efficient changes to their home.

Figure 24: Reduction in Electricity Use due to takeCHARGE Campaign



- Given the lack of change in penetration for the ad, it seems that it is time for a change to ensure that messaging continues to cut through the clutter and keeps building upon awareness. While the ad continued to be considered effective by almost half of viewers the current version is not drawing in a new audience or expanding exposure suggesting it is time to refresh.

2.15 Awareness & Use of Rebate Programs

Those taking part in the survey were asked whether or not they were aware of each of five rebate programs, whether or not they took part in the program and (now that they are aware) how likely are they to take part in this particular program over the next 12 months. Changes were introduced to the questionnaire to gather additional information about whether or not the household conducted the work themselves (DIY) or hired someone else including a retailer, contractor, handyman, or relative.

Table 13: Awareness & Use of Rebate Programs (2013)

Awareness & Use of Rebate Programs (2013 Only)	St. John's CMA (n=200)	Labrador (n=200)	Rest of Province (n=200)	Total NL (n=600)
Programmable Thermostat				
Aware of Program	*44%***	*33%***	*37%*	*39%*
Participated in Program	*6%***	*3%*	*2%***	*4%*
Likely to take part in next year	*↓18%***	*↓22%*	*27%***	*23%*
High Performance Electronic Thermostat				
Aware of Program	*17%*	*14%*	*↑19%*	18%
Participated in Program	*1%*	*1%*	---	<1%
Likely to take part in next year	*↓7%***	*↓14%*	*15%*	*12%*
Replace Old Windows with Energy Star Windows				
Aware of Program	*↓40%*	*37%*	*43%*	41%
Participated in Program	*5%*	*4%*	*6%*	6%
Likely to take part in next year	*10%*	*↓12%*	*↓14%*	*↓13%*
Upgrade Insulation in Basement/Crawl Space				
Aware of Program	*40%***	*30%*	*38%**	38%
Participated in Program	*4%*	*3%*	*2%*	3%
Likely to take part in next year	*↓8%**	*↓14%**	*↓15%***	*↓12%*
Upgrade Insulation in Attic				
Aware of Program	*40%***	*28%*	*36%**	38%
Participated in Program	*4%*	*3%*	*4%*	4%
Likely to take part in next year	*↓9%*	*↓11%*	*14%*	*↓12%*

***=p<.10; **p<.05; ***p<.001** *↓ ↑= Direction of significant change p<.10 from 2012 to 2013*

- Following increases observed from 2010 to 2012, over the past year there has been no change in awareness for any of the rebate programs and only marginal, non-significant increases in participation rates.

- Compared to all other rebates, fewer residents (18%) knew about the program for the high performance electronic thermostats and few took part in this program (<1%) anywhere in the province. However, there was a significant increase in awareness of the high performance thermostats among those living in Rest of Province (19% versus 10%). Future interest in these thermostats was also twice as high in Labrador (14%) and Rest of Province (15%) compared to St. John's CMA (7%).

- Overall, residents were most likely to have used the program to upgrade their windows (6%) with 3%-4% taking part in insulation upgrades to either their attic or basement/crawl space & a similar proportion installing programmable thermostats.

Table 14: Use of 'Do-it Yourself' or Paid Assistance for Rebate Programs (2013)

Program	% Taking Part	Sample Size (n)	Do-It-Yourself (DIY)	Paid Someone Else	IF PAID SOMEONE ELSE:		
					Contractor	Retailer	Handyman
Replace Old Windows with Energy Star Windows	6%	n=30	**40%**	**60%**	***40%***	***12%***	***8%***
Programmable Thermostat	4%	n=21▼	**75%**	**11%**	***11%***	***0%***	***0%***
Upgrade Insulation in Attic	4%	n=20▼	**74%**	**26%**	***18%***	***0%***	***8%***
Upgrade Insulation in Basement/Crawl Space	3%	n=19▼	**62%**	**38%**	***28%***	***1%***	***9%***
High Performance Electronic Thermostat	<1%	n= 4ǂ	**(4)**	**0**	***0***	***0***	***0***
TOTAL		***N=63***	***74%***				

****=p<.10; **p<.05; ***p<.001*** *▼Treat with caution due to small sample sizes (n>10<30)*
ǂ Percentages suppressed due to small sample size.

- For the most part, households were likely to have made the changes themselves (DYI) especially for thermostat installations (≈75%+), or basement (62%) and attic (74%) insulation, with contractors primarily used otherwise.

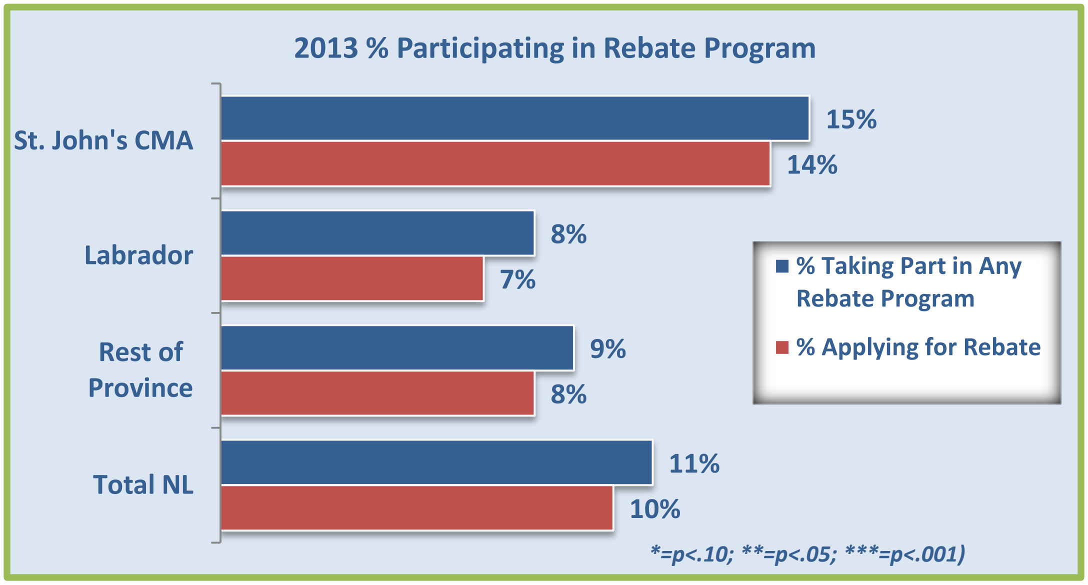
- For window installations a contractor was most likely to be hired (60%) although preliminary evidence suggests that those living outside of St. John's were equally likely to self-install windows.

- Currently, interest in future participation was twice as high for programmable thermostats then for any other rebate program.

- In fact, there were declines in future intent to take part in the window and insulation programs suggesting these programs in their current configuration are generating lower interest. Increased awareness is likely required in order to re-stimulate interest in these programs.

2.16 Participation in the Rebate Program

Figure 25: Percent Participating in Rebate Program in 2013



- Overall, about 11% of households reported they had taken part in at least one of the rebate programs at some time in the past with the vast majority applying for a rebate. This rate of participation was similar to results in 2012.

- St. John's CMA continued to have the highest rate of participation with 15% of households having taken part in one of the programs offered and 14% following through to redeem the rebate.

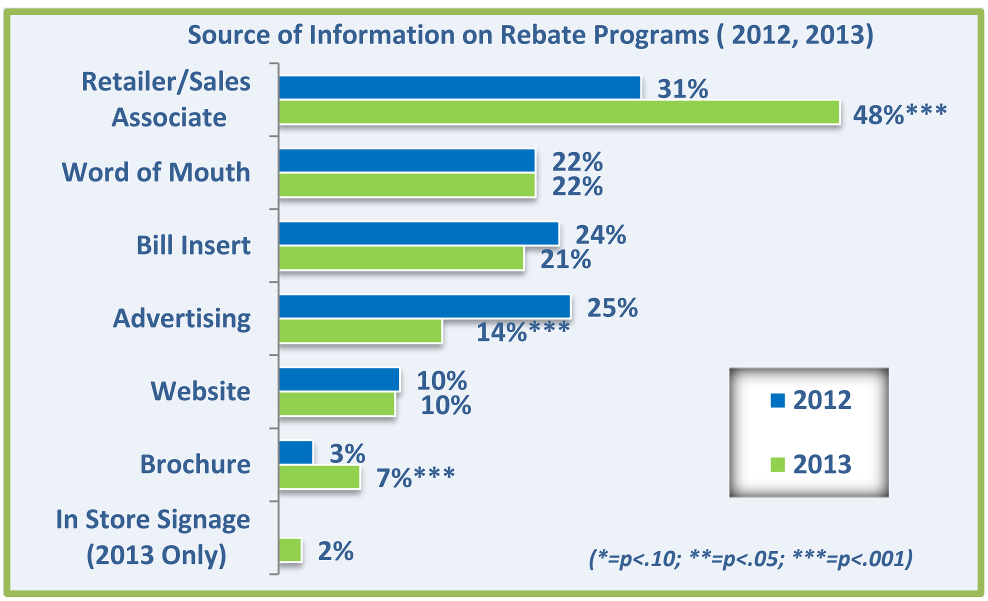
- Participation rates were similar in both Labrador (8%) and for those living in the Rest of Province (9%) with about 7-8% having applied for a rebate at some time.

Table 15: Rebates Applied for by total & for Program Participants (2013)

2013 Rebate Program Participation		
Program:	Total (n=600)	Program Participants (n=57)
Energy Star Windows	5%	48%
Insulation Attic	3%	33%
Insulation Basement	3%	30%
Programmable Thermostat	*3%*	*27%*
High Performance Electronic Thermostat	<1%	5%

- In general, among those taking part in any rebate program almost half (48%) had installed Energy Star windows with about one third installing insulation in the attic (33%) or basement (30%) and 27% applying for a rebate for a programmable thermostat.
- Almost one in three (31%) participants took part in more than one program with the largest overlap occurring among those who installed insulation in either their attic or basement with just over half doing both (17% of participants installed insulation in both their attic and basement).

Figure 26: Source of Information on Rebate Programs (2012, 2013)



- In 2013, those taking part in any rebate program, were more likely to cite the retailer or retail sales associates (48% versus 31%) as the primary source of information for the rebate program.

- Conversely, significantly, fewer mentioned the role of advertising as a source of program information (14% versus 25%).

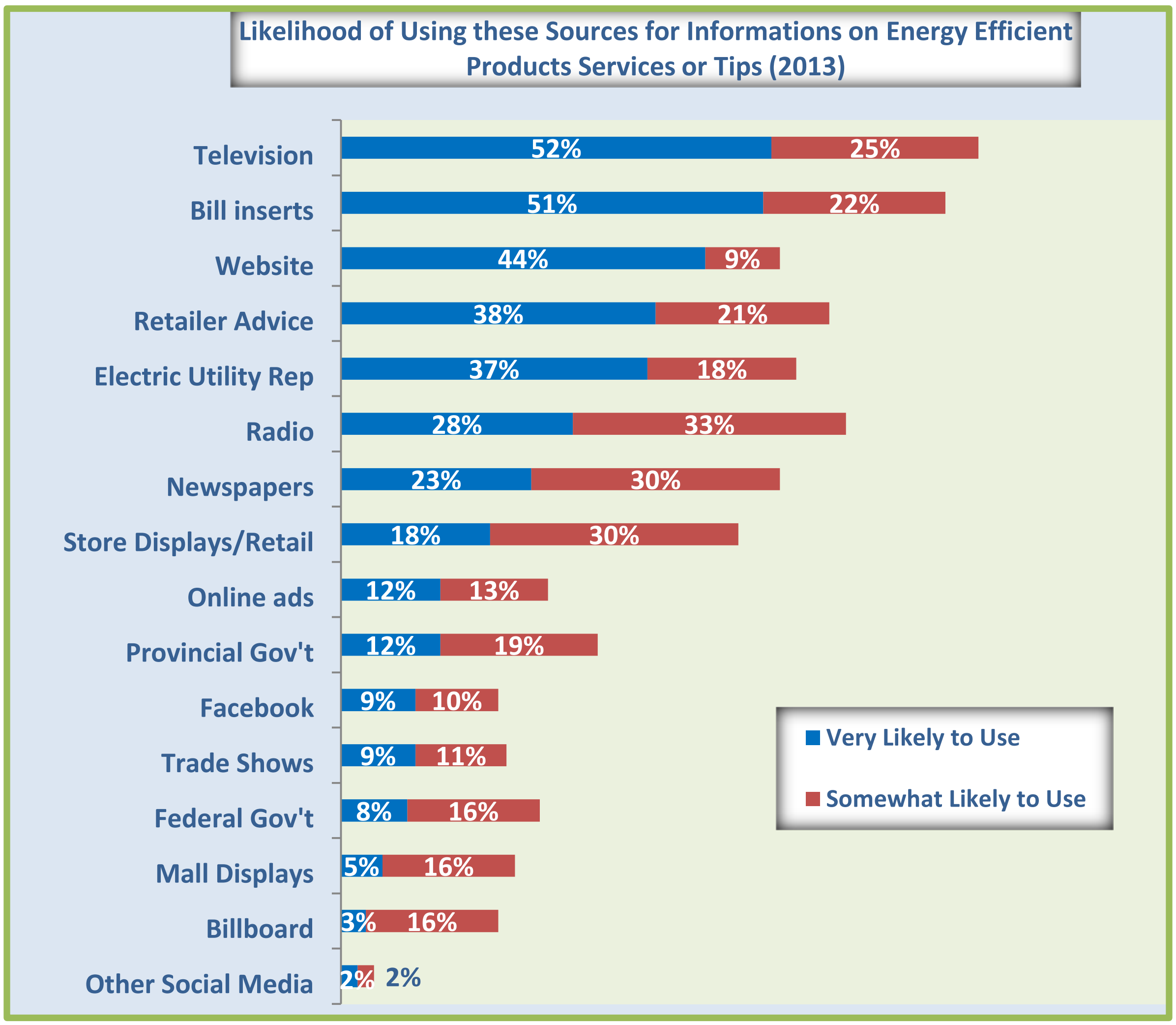
- All of those interacting with retail staff found them to be at least '*somewhat helpful*' in assisting consumers with the rebate programs with 66% finding them '*very helpful*' in this regard.

2.17 Preferred Information Sources

Respondents were read a detailed list of potential sources for obtaining information about energy efficient products and services. In addition each was asked for their preferred method for accessing new information.

2013 Likelihood of Using Various Information Sources

Figure 27: Likelihood of Using Sources for Information on Energy Efficient Products, Services & Tips

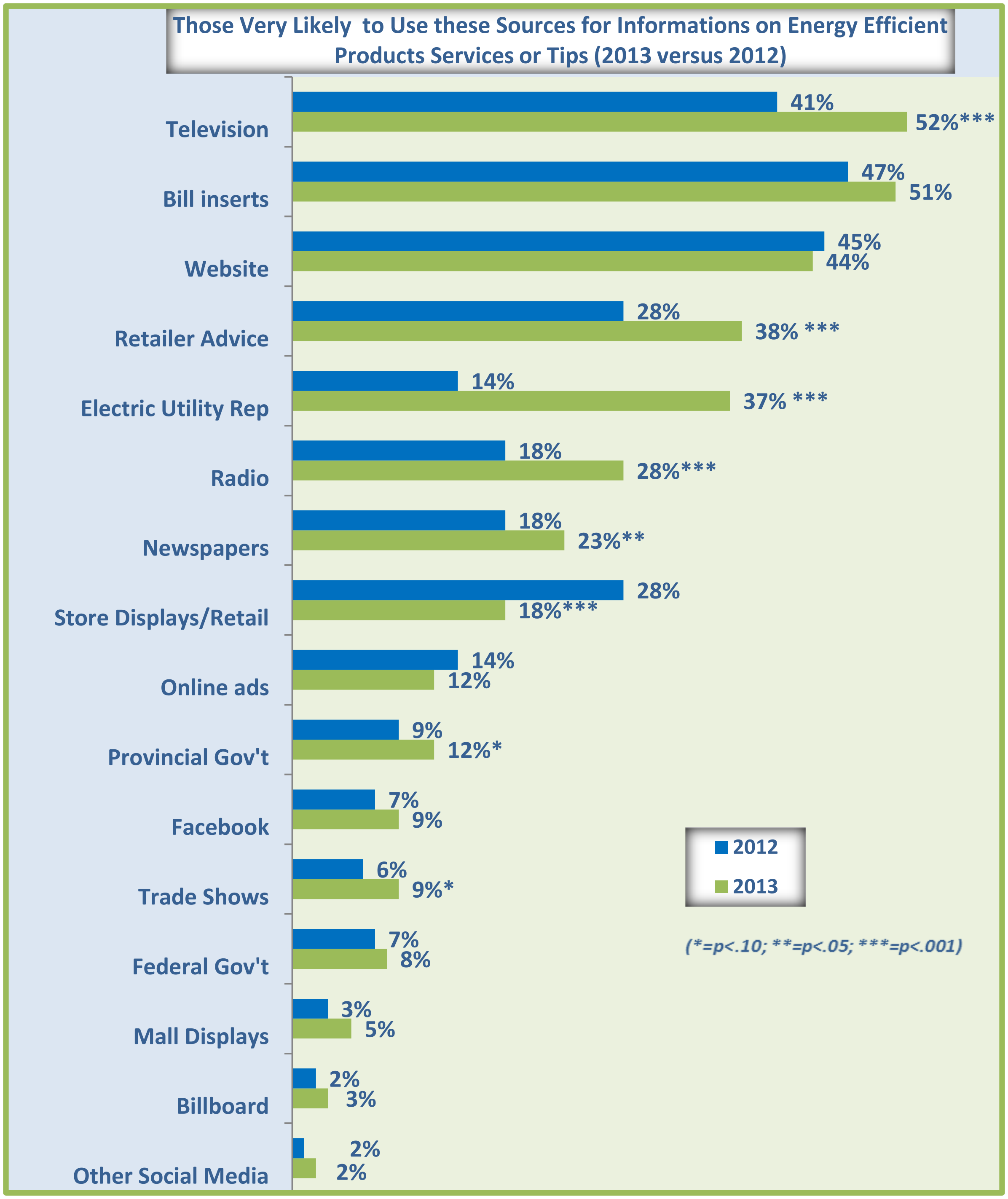


- In 2013, television slightly edged out bill inserts as the information source most likely to be used for finding out about energy efficient tips, services, and products with about three-quarter of residents reporting they are at least somewhat likely to learn about new information through these sources.
- Just over half thought either television or bill inserts would be '*very likely*' to get their attention followed closely by use of a website (44%).
- Retailer and power companies' representatives (i.e., electric utility reps) were also considered to be reasonable resources for sharing energy and conservation tips by over half of respondents with about 38% noting they are '*very likely*' to get information from these sources.
- Radio, and newspapers were still perceived to be helpful for promoting energy tips and information by a majority of residents although only 28% and 23% respectively indicated they were 'very likely' to be informed by these resources.
- Retail and store displays were also noted by just under as a likely resource although half of those taking part (48%).

Comparison of Information Use 2013 versus 2102

- Compared to 2012, there were some notable changes in residents' perceptions surrounding information sources.
- There was no change observed in perceptions surrounding use of bill inserts or the website although the percent indicating they were *'very likely'* to be informed by television increased from 41% in 2012 to 52% in 2013.
- Likewise, in 2013 retailer advice (38% versus 28%), and especially utility reps (37% versus 14%) were significantly more likely to be seen as strong resources compared to response in 2012.
- Radio (28% versus 18%) and, to a lesser extent, newspaper (23% versus 18%) were also perceived to be more effective sources of information in 2013.
- In contrast, the perceived effectiveness of retail or store displays declined (18% versus 28%) although it is not clear if this reflects reduced exposure to information in-store or lack of in-store programs.

Figure 28: Those Very Likely to Use the Following Sources for Information on Energy Efficient Products, Services & Tips (2013 versus 2012)



Preferred Information Source 2013

Table 16: Preferred Resource for Information on Energy Efficiency

Preferred Resources for Information		
	2012	2013
Bill Inserts	69%	↓53%***
Email	---	↑25%***
Television	21%	↓15%***
Website	21%	↓12%***
Newspaper	5%	3%
FaceBook	4%	2%
Utility Rep	4%	5%
Radio	4%	4%
Store Display	3%	0%
Retailer Advice	---	2%
Provincial Gov't	2%	1%

**=p<.10; **p<.05; ***p<.001 between years ↑↓=Direction of significant change from 2012 to 2013*

- Bill inserts are overwhelming cited as the preferred option for informing households about energy efficiency tips suggesting that this format might be perceived to be more user- friendly for sharing complex information while TV is more likely to generate awareness.

- Despite the fact that just over half 53% of all respondents indicated a preference for receiving this information as a bill insert this was a decline over last year when 69% endorsed the use of bill inserts.

- Television also dropped from 21% to 15% as a favourite medium for those wanting information on energy savings, as did the use of websites dropping from 21% to 12% although 44% are still very likely to use this latter source when seeking information.

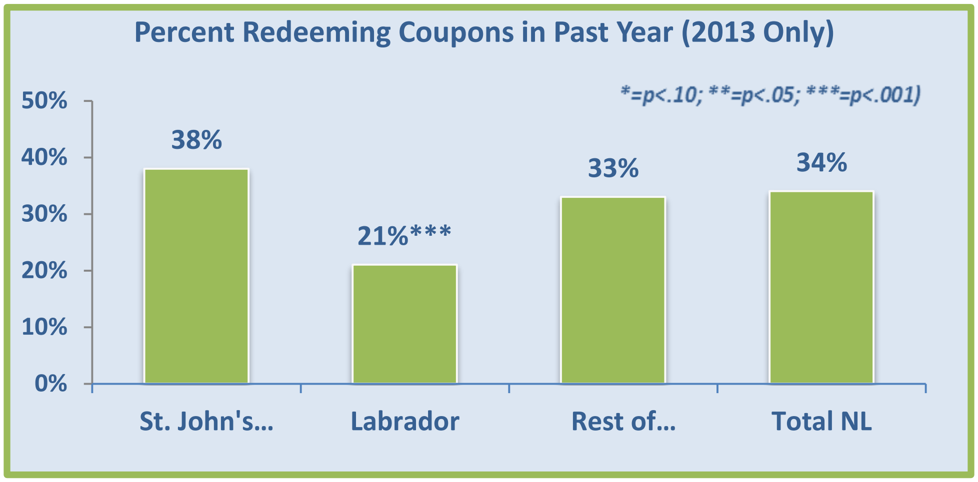
- One in four households spontaneously noted the appeal of email as a preferred source of information, suggesting opportunities for a more environmentally friendly and personalized approach for alerting customers to relevant energy conservation materials.

- The only significant difference by region was noted for Facebook with those living in Labrador 4 times as likely to mention Facebook as a preferred method for sharing information compared to those living elsewhere in the province (8.5% versus 1.5%).

2.18 Coupon Use & Potential for Stimulating Purchase

In 2012 a new set of questions was added to the survey to assess potential for using coupons to support use of energy efficient products and/or services. The questions were changed in 2013 with each asked if they had redeemed any coupons in the past year and, if yes, how likley would they be to use coupons to make energy efficient purchases.

Figure 29: % Redeeming Coupons in Past Year (2013)



- Just over a third of respondents (34%) reported using any coupons in the past year to make retail purchases.
- Those living in Labrador were least likely to use coupons (21%) versus 33% in the Rest of Province and 38% in St. John's CMA.
- When specifically questioned about their likelihood of using a coupon to make energy efficient product purchases the vast majority (89%) responded positively. This was especially true in Labrador where 98% of current coupon users would be interested in coupons for energy efficient products as compared to 91% in St. John's and 88% in ROP.
- Those most likely to use coupons and to express interest in coupons for energy efficient products on average tended to be younger with a larger proportion under 50 years of age. Women made up three-quarters of those using coupons or having an interest in energy efficient product coupons (75%) and the vast majority were married (82%).

2.19 Delivery of Energy Efficient Information and Rebate Programs

In 2013 a set of new questions were included asking respondents who they thought should be providing householdswith information such as advertising, booklets, brochures or information on the web, about efficient use of energy. They were also asked for their opionion about who should be delivering programs such as incentives, rebates, or financing plans to improve the energy efficiency of homes

Table 17: Energy Efficient Information Provider and Program Delivery (2013)

(2013 Only)	St. John's (n=200)	Labrador (n=200)	ROP (n=200)	Total NL (n=600)
Who Should Provide You With Info On Energy Efficiency				
Newfoundland Power	**58%**	**10%*** **	**50%**	**51%**
NL Hydro	8%	58%***	13%	**13%**
Provincial Gov't	30%	32%	31%	**31%**
Federal Gov't	10%	12%	14%	**12%**
Who Should Deliver Energy Rebate Programs, Incentive, Financing Plans				
Newfoundland Power	40%	5%***	41%	39%
NL Hydro	7%	51%***	8%	**10%**
Provincial Gov't	56%	49%	47%	**51%**
Federal Gov't	23%	17%	25%	**24%**

=p<.10; **p<.05; ***p<.001 More than one response allowed.

- A slight majority in each market felt the respective power companies should be the principal bodies delivering information on energy efficiency; in Labrador NL Hydro (58%) & on the island Newfoundland Power (50% to 58%).
- For delivering rebates there was a split between local power companies versus provincial governments especially in Labrador & Rest of Province although in St. John's CMA there was a greater tendency for residents to feel that the Provincial Government should be delivering any energy rebates or home energy financial incentives.
- In general, only about one-third of residents felt that the Provincial Government should provide information on energy efficiency but this climbed to 51% in terms of support for this body in delivering residential energy rebates, incentives and financing.

2.20 Use of Social Media

- Over the past year, there was no change in the percent of residents reporting they have a social media account of some kind (41%) primarily FaceBook.

- However, those with a Twitter account have increased from 3% to 5% due to growth in Twitter use in all three areas of the province. In all but two cases, Twitter users also use FaceBook.

- Again, residents in Labrador were more likely to have a FaceBook account (56%) compared to those in St. John's (41%) and the Rest of Province (40%).

- Twitter use by heads of household in NL was skewed even younger than FaceBook use with 78% falling under 49 years of age versus 52% of FaceBook users. Twitter users also tend to be more highly educated (68% have university and post-graduate level education) and affluent with incomes primarily over $70k per year (71%).

Figure 30: Use of Social Media Accounts 2012 versus 2013

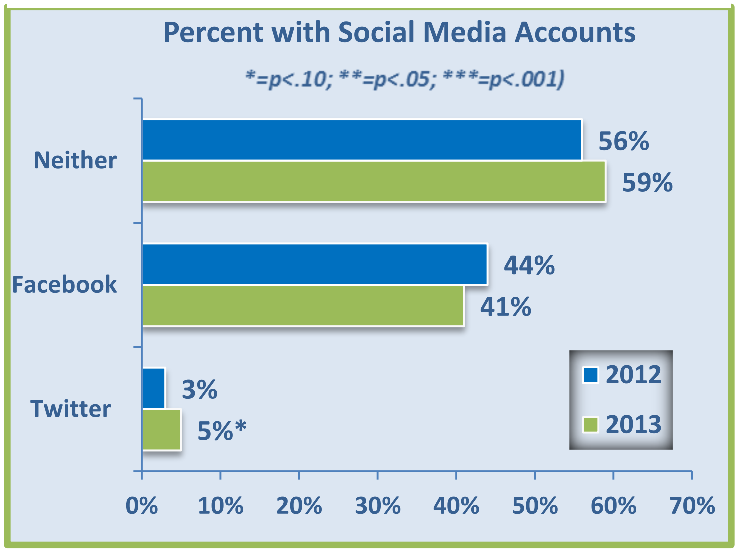
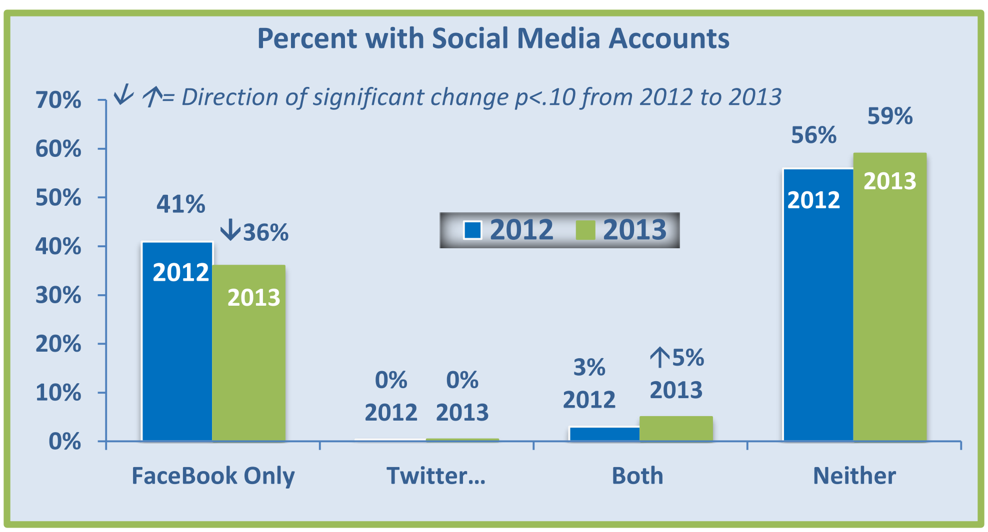


Figure 31: Percent with Social Media Accounts (2012 versus 2013)



Appendix A

SURVEY LENGTH ___________ MIN
Start Time:______________________
Finish Time:_____________________
Total # of Calls _____________

Area 1 = St John's CMA
Area 2 = Labrador CMA
Area 3 = Rest of Province

Area: ________

Interviewer ID #: ____ ____ ____

Hello, my name is ____________________________, I'm from Focal Research, a professional social research firm located in Atlantic Canada. We are conducting a brief survey on electricity and home energy use. May I please speak to a someone who is 18 years of age or older and is one of the main decision-makers in your household (one of the heads of household). The survey will only take about 10-15 minutes to complete and your help is really appreciated.

REFER TO INTERVIEWER SUPPLEMENT IF ANY QUESTIONS ABOUT THE RESEARCH.

A) Before we proceed, in accordance with information privacy legislation, I must read you the following privacy statement and statement of consent:

MANDATORY PRIVACY MESSAGE AND STATEMENT OF CONSENT (MUST BE READ TO EVERYONE): The information gathered in our survey today is confidential and used for research purposes only. It will be stored and reported anonymously so your individual responses cannot be identified. Focal Research is an independent Atlantic Canadian social research firm and we follow all national and international regulations for privacy protection and research ethics. Your participation is voluntary throughout the survey and you have the right to refuse to answer any question or to stop the interview at any time.

PRIVACY MESSAGE READ: **Yes** ☐
No - Return to Privacy Message before proceeding

The survey will take about 15 to 20 minutes depending on your answers and we would really appreciate your help. Is this a good time for you to take part?

IF NO 0 - Thank & Terminate **IF YES 1 - CONTINUE**

SURVEY CLOSE

That completes our survey. We would now like to ask if you are interested in being part of an on-going confidential test panel. We will not share your contact information with anyone else. Once or twice over the next year you may be contacted by phone or by mail to get your opinions on various research issues or concepts. The test panel is used for research purposes only. You are not obligated to take part and are free to withdraw at any time. Is this something you are interested taking part in? **Panel : YES 1 NO 2**

IF YES: May I have your name and mailing address for our panel records? (READ ADDRESS BACK TO RESPONDENT ONCE RECORDED)

Name: ____

Address: ____

____

On behalf of Focal Research, we would like to thank you for your contribution to our research. You may receive a quality control check. My supervisor calls back 10% of all my completed surveys to make sure you were comfortable taking part in the survey and that I was doing my job properly. May I please confirm your telephone number and first name, so she will know who to ask for? This information will be removed from your survey answers following the quality control check.

Respondent Name:

____

Date Survey Completed: ______________________________________ **Month:** ___ ___

Telephone Number on SAMPLE: ________________________________ **Day:** ___ ___

Alternate Phone (if different than sample) _______________________

END TIME ______ : _____ **Page (sample):**___________________

Supervisor _______________________________________

Quality Control Check Outcome & Questions Checked:	Staff: ___________________________ Date:_____________________ ____ ____ ____

PART A: GENERAL HOME ENERGY USE

A1a. First of all, what is the **main** method you use to heat your home? **DO NOT READ.**

If "don't know" ask if someone else in the home is more familiar with this info and ask to speak with that person and repeat intro otherwise, thank and terminate

A1b. What if any other forms of home heating do you also use, (that would be secondary forms of home heating)?

A1c. In the past when heating your home, what percentage of your total home heating costs were used on each of the following fuels. (Give a percentage for each) **(MUST ADD TO 100%)**

	A1a Main Heating	A1b Other Heating		A1c % of Heating Costs
Electricity	1	1	A1a_____	A1c1_____%
Oil	2	2		A1c2_____%
Wood	3	3	A1B1_____	A1c3_____%
Propane Fireplace	4	4		A1c4_____%
Kerosene	5	5	A1B2_____	A1c5_____%
____________________Other	6	6		A1c6_____%
				100%

A2a. How familiar are you with the amount of money you pay for the electricity you use? READ LIST If 'not at all familiar' thank and terminate & ask to speak with the person who is informed.

Very Familiar 1 Somewhat Familiar 2 Not Familiar – Included in Rent 4		OR Not at all Familiar	3 - T & T (SEE NOTE ABOVE)	A2a_____

A2b. What is your best estimate of your average monthly winter electricity bill? That is the amount you usually spend each month on electricity during the winter. **ROUND TO NEAREST DOLLAR**

(DON'T KNOW = 999) **A2B** $_________________

A3a. Do you have either a heat recovery ventilator (HRV) or an air exchanger installed in your home?

Yes HRV- 1 CONTINUE (A3b)	No 0 – GO TO A4a	
Yes – Air Exchanger - 2 ASK A3bb	DK 9- GO TO A4a	A3a______

A3b. IF YES, How old is your **heat recovery ventilator** (HRV)? **Is it ….READ LIST**

less than 5 years old 1
5-15 years old 2
15 years or older 3

A3b________

A3c. Which of the following best describes how you use your heat recovery ventilator HRV? Is it ….READ LIST

Always turned on 1
Turned off occasionally and/or for short periods 2
Turned off for several months at a time 3
Other ______________________________ 4

A3c______

A3d. As far as you know, is your current heat recovery ventilator (HRV) an energy efficient model?

Yes 1 No 0 DK 9

A3d_____

A3e. Do you have any plans to replace your heat recovery ventilator within the next 5 yrs?

Yes 1 No 0- GO TO A3G DK 9 - GO TO A3G

A3e______

A3f. IF YES/DK How likely are you to purchase an energy efficient HRV model?

Very Likely 1 Somewhat Likely 2 Not at all Likely 3

A3f_____

A3g. What if anything would help you or make it more likely for you to upgrade to an energy efficient HRV with the next 5 years? NOTHING = 100

____ A3g1______

____ A3g2______

Rebate	1	5	Save Energy
Coupon	2	6	Save Money
Assistance for installation	3	7	
Information/advice	4	20	Other:________________

A3bb. IF a3a yes Air Exchanger, How old is your air exchanger? **Is it ….READ LIST**

less than 5 years old 1
5-15 years old 2
15 years or older 3

A3bb________

A3cc. Which of the following best describes how you use your air exchanger? Is it ….READ LIST

Always turned on 1
Turned off occasionally and/or for short periods 2
Turned off for several months at a time 3

A3cc______

Other ______________________________ 4

A3dd. As far as you know, is your current air exchanger an energy efficient model?

Yes 1 No 0 DK 9 A3dd______

A3ee. Do you have any plans to replace your air exchanger within the next 5 yrs?

Yes 1 No 0- GO TO A3GG DK 9 - GO TO A3GG A3ee______

A3ff. IF YES/DK How likely are you to purchase an energy efficient air exchanger model?

Very Likely 1 Somewhat Likely 2 Not at all Likely 3 A3ff______

A3gg. What if anything would help you or make it more likely for you to upgrade to an energy efficient air exchanger with the next 5 years? NOTHING = 100

____ A3gg1______

____ A3gg2______

Rebate	1		5	Save Energy
Coupon	2		6	Save Money
Assistance for installation	3		7	
Information/advice	4	Other:______________________	20	

A4a. Would you say (**READ LIST**) always, sometimes, rarely or never make a conscious effort to reduce how much electricity you use? **(DON'T KNOW =99)**

Always **3** Sometimes **2** Rarely **1** Never **0** **A4a**______

IF RARELY OR NEVER SKIP TO B1A NEXT PAGE

A4B. What is the main reason you try to reduce or manage your use of electricity (**PROBE:** Why do you try to reduce the amount of electricity used in your household? **DO NOT READ LIST**

Specify: ____

____

____

To save money/lower bill	1	Not trying to reduce use	4
To help the environment	2	Other______________________	5
To save/conserve energy	3		

A4b.1________
A4b.2________

PART B: HOME ENERGY AWARENESS AND PRACTICES

B1a. Are you aware of any advertising campaigns in Newfoundland and Labrador promoting energy saving products and tips to save energy? **DON'T KNOW=9**

Yes 1 No 0 **IF NO OR DON'T KNOW GO TO B2** **B1a______**

B1b. IF YES What is the name of this energy saving advertising campaign? **DO NOT READ LIST RECORD ALL RESPONSES (DON'T KNOW=99)**

Specify: ____

B1b.1______

B1b.2______

Take Charge	1	Provincial government campaign	6
NF Power campaign	2	Energy Savers Rebate	7
NF and Labrador Hydro campaign	3	Turn Back the Tide	9
Tax credit campaign	4	Other____________________	20
Federal government campaign	5		

B2. I'm now going to read you a list of home energy-saving products, features or initiatives. For each please tell me which of the following best describes your current response to this idea:

I. I have never thought about making this change.
II. I am interested in this change but not in the next year.
III. I am planning to make this change within the next year.
IV. I have made this change or started using this feature <u>within the past year</u>.
V. I already made this change or was using the feature <u>more than one year ago</u>.

First of all for... (ROTATE LIST) (DON'T KNOW =9)	Never thought about this Change	Interest in this change but not in next year	Planning change within next year	Already made this change <1 year ago	Already made this change > 1 year ago	
1. Installing foam gaskets behind outlet covers and switch plates.	1	2	3	4	5	B2.1_____
2. Replacing weather stripping on exterior doors.	1	2	3	4	5	B2.2_____
3. Caulking around vents or windows to reduce drafts.	1	2	3	4	5	B2.3_____
4. Installing motion detectors or timers on exterior lighting.	1	2	3	4	5	B2.4_____
5. Installing foam insulation <u>on hot water pipes.</u>	1	2	3	4	5	B2.5_____
6. Switching to cold water washing.	1	2	3	4	5	B2.6_____
7. Line-drying clothes rather than use the dryer.	1	2	3	4	5	B2.7_____

	8. Setting back thermostats at night or when away from home.	1	2	3	4	5	B2.8 _____
	9a. Replacing indoor light bulbs with compact fluorescent light bulbs.	1	2	3	4	5	B2.9 _____
	9b. Replacing outdoor light bulbs with compact fluorescent light bulbs.	1	2	3	4	5	B2.9b _____
	10. Replacing light bulbs with dimmable compact fluorescent light bulbs	1	2	3	4	5	B2.10_____
	11. Replacing light bulbs with LED light bulbs.	1	2	3	4	5	B2.11_____
	12. Replacing a regular shower head with a low flow shower head.	1	2	3	4	5	B2.12_____
	13. Installing extra insulation around a hot water tank.	1	2	3	4	5	B2.13_____
	14a. Purchasing ENERGY STAR appliances such as stove, fridge, or washer ?	1	2	3	4	5	B2.14a_____
	14b. Purchasing ENERGY STAR electronic devices such as TVS, battery chargers, DVD's, audio players.	1	2	3	4	5	B2.14b_____
	15. Purchasing other ENERGY STAR labeled products such as power bars, ceiling fans and light fixtures.	1	2	3	4	5	B2.15_____
	16. Switching to LED lights for Christmas	1	2	3	4	5	B2.16_____

B3a. What, if any, other energy efficient changes have you made to your home in the past year? NONE=100 – GO TO B4A

____ B3a.1 ____

____ B3a.2 ____

____ B3a.3 ____

B3b. Why did you make this change? PROBE: What motivated you to make this change?

B3B.1____

B3B.2____

B3B.3____

Rebate	1		5	Save Energy
Coupon.	2		6	Save Money
Advertising	3		7	
Friend/Family Member	4	Other:______________________	20	

B4a. Have you redeemed or used any coupons in the past year?

Yes 1 (No - 0 DK 9 - GO TO C1A) B4a______

B4b. IF YES Would you use a coupon to purchase an energy efficient product?

Yes 1 No 0 DK 9 B4b______

PART C: AWARENESS OF ENERGY SAVING PROGRAMS & PROMOTIONS

C1a. Newfoundland Power and Newfoundland and Labrador Hydro's energy saving campaign is called Take Charge. First…**(READ LIST).**

	YES	NO	DK	
1. Have you ever heard of the Take Charge program?	1	0- **GO TO C4**	9	C1a1_____
3. IF YES Have you heard or seen anything related to the Take Charge campaign in the past year?	1	0- **GO TO C2**	9	C1a3_____

C1b. **IF YES** Where do you recall seeing or hearing about the Take Charge advertising campaign in the last year? **DO <u>NOT</u> READ LIST RECORD ALL RESPONSES (DON'T KNOW=99)**

	First Mention:	C1b1______
Take Charge Website 1	Building supply/retail store 7	Other Mentions:
Bill inserts 2	Magazine or booklet 8	C1b2 _____
Facebook 3	Trade shows/displays 9	C1b3 _____
Television 4	Online advertising 10	C1b4 _____
Radio 5	Word of Mouth (Friend/Family)11	
Newspaper 6	Social Media 12	

C2. Take Charge has a web site at takechargenl.ca which gives information about energy saving tips and rebates.				
	YES	NO	DK	
a Are you aware of this site? **IF NO/DK GO TO C3**	1	0	9	C2a_____
b IF YES Have you ever visited this site? **IF NO/DK GO TO C3**	1	0	9	C2b_____
c. IF YES How regularly do you visit this site? **READ LIST**				
At least once per week	1			
At least once per month	2			C2c____
At least once every few months	3			
once or twice a year	4			
Do not visit regularly	5			
d. When was the last time you visited the Take Charge site? **(READ LIST)**				
Within the last month	1			
Within the last six months	2			C2d______
Within the past year	3			
More than one year ago	4			
C3. Take Charge also has a Facebook page.				
	YES	NO	DK	
a Are you aware of this Facebook page? **IF NO/DK GO TO C4a**	1	0	9	C3a____
b IF YES Have you ever visited the page? **IF NO/DK GO TO C4a**	1	0	9	C3b____
c. IF YES How regularly do you visit this Facebook page? **READ LIST BELOW**				
At least once per week	1			
At least once per month	2			C3c_____
At least once every few months	3			
once or twice a year	4			
Do not visit regularly	5			
d. When was the last time you visited the Take Charge's Facebook page? **(READ LIST)**				
Within the last month	1			
Within the last six months	2			C3d______
Within the past year	3			
More than one year ago	4			

C4a. Do you recall a TV ad where you see talking thermostats, windows and insulation sitting in a director's chair on a TV set?

YES 1 NO 0 DK=9 C4a_____

IF NO OR DON'T KNOW GO TO D1

C4b. IF YES What are the main messages in this advertising campaign or material?

______________________________ C4b1______

______________________________ C4b2______

______________________________ C4b3______

Insulation can save you money	1	Useful tips and ideas	4	
There are things you can do to help reduce your energy use	2	Message was/ unclear	98	
The gov't has programs to help you reduce your energy use	3	Don't know /Can't remember	99	
Other______________________________	5			

C4c. Using a scale of 1 to 5 where 1 means not at all effective and 5 means very effective, how effective do you think thi s advertising is in supporting consumers in making energy efficient changes to their home?

Not at all Effective				Very Effective	
1	2	3	4	5	C4c_____

C5. Have you made any changes to try to reduce the amount of electricity you use as a result of seeing or hearing anything about the Take Charge campaign?

YES 1 NO 0 DK=9 C5_____

PART D: INFORMATION SOURCES & MEDIA USE

D1. UNAIDED RECALL: If you were looking for information on energy efficient products, services or tips where is the first place (or places) you would go to find this information? USE CODING FROM D2A (DON'T KNOW =999) (WORD OF MOUTH (FRIENDS/FAMILY) = 20, EMAIL=21)

______________________________ D1.1______

______________________________ D1.2______

______________________________ D1.3______

D2a Now I'm going to read you a list of sources that some people use to obtain information about energy efficient products, services or tips. First I'd like you to tell me if you have ever used any of these sources to obtain information on home energy? READ & ROTATE LIST.

D2b FOR EACH If you were looking for information on energy efficient products, services or tips how likely would you be to use this source (again) for information using a scale of very likely, somewhat likely, or not at all likely. (DON'T KNOW=9)

		D2a Ever Used		D2b Likelihood of Use			
		D2a		Very Likely	Somewhat Likely	Not at all Likely	D2b
( )	On-line ads	1	____	1	2	3	D2B1_______
( )	Facebook page	2	____	1	2	3	D2B2_______
( )	Newspapers	3	____	1	2	3	D2B3_______
( )	Radio	4	____	1	2	3	D2B4_______
( )	Television	5	____	1	2	3	D2B5_______
( )	Bill inserts or newsletter	6	____	1	2	3	D2B6_______
( )	Store displays	7a	____	1	2	3	D2B7A______
( )	Advice from retailers	7b	____	1	2	3	D2B7B______
( )	Website	8	____	1	2	3	D2B8_______
( )	An electric utility representative	9	____	1	2	3	D2B9_______
( )	Billboards	10	____	1	2	3	D2B10______
( )	Trade Shows	11	____	1	2	3	D2B11______
( )	Mall Displays	12	____	1	2	3	D2B12______
( )	Provincial government department	13	____	1	2	3	D2B13______
( )	Federal government department	14	____	1	2	3	D2B14______
( )	Other Social Media (i.e. Twitter)	15	____	1	2	3	D2B15______

D3 Of all of the sources available what would be the best way(s) to reach you with information on energy efficiency? (**PROBE:** How would you like to learn about energy efficient product services or how you could save energy in your home? **USE CODING FROM D2B (WORD OF MOUTH (FRIENDS/FAMILY) = 20, EMAIL=21)**

____ **D3.1**_______

____ **D3.2**_______

____ **D3.3**_______

D3b In your opinion, who should be providing you information such as advertising, booklets, brochures or information on the web, about efficient use of energy? **DO NOT READ LIST – USE CODING BELOW**

Specify: ____ D3b1______ D3b2______

D3c In your opinion, who should be delivering programs such as incentives, rebates, or financing plans to improve the energy efficiency of your home? **DO NOT READ LIST – RECORD BELOW**

Specify: ____ D3c1______ D3c2______

Newfoundland Power	1	Other________________________	8
Newfoundland & Labrador Hydro	2		
Electric Utility company	3	______________________________	
Federal Government	4		
Provincial Government	5		

I will now read a list of available programs offered by the Take CHARGE program.
For each I would like you to tell me whether or not you were aware of the program, whether or not you have participated in this program or are likely to participate in the near future. First for…

D4. A rebate when you purchase a programmable thermostat:

	Yes	No	DK	
a. Were you aware of this program? **IF NO GO TO E**	1	0	9	D4a_____
b. **IF YES** Did you take part in this program?	1	0	9	D4b_____

c. **IF YES** Was is a do-it-yourself project or did you pay someone else to help you do it?

Do it yourself	1 - **GO TO E**	
Paid Someone else	2 - **CONTINUE**	D4c____
Both	3 - **CONTINUE**	

d. **IF PAID** Who did you pay to have do the work?

Contractor 1	Retailer installer 4	
Handyman 2	Other ____________________________	D4d____
Relative 3		

	Yes	No	DK	
e. **ALL** (Now you are aware) Are you likely to take part in this program (again) in the next 12 months?	1	0	9	D4e_____

D5. A rebate on the purchase of <u>high performance electronic thermostats</u>.				
	Yes	No	DK	
a. Were you aware of this program? IF NO GO TO E	1	0	9	D5a_____
b. **IF YES** Did you take part in this program?	1	0	9	D5b_____
c. **IF YES** Was is a do-it-yourself project or did you pay someone else to help you do it?				
Do it yourself 1 - GO TO E Paid Someone else 2 – CONTINUE Both 3 - CONTINUE				D5c ____
d. **IF PAID** Who did you pay or hire to do the work?				
Contractor 1 Retailer installer 4 Handyman 2 Other ___________________________ Relative 3				D5d ____
e. **ALL** (Now you are aware) Are you likely to take part in this program (again) in the next 12 months?	1	0	9	D5e_____

D6. A rebate when you replace your old windows with ENERGY STAR windows.				
	Yes	No	DK	
a. Were you aware of this program? IF NO GO TO E	1	0	9	D6a_____
b. **IF YES** Did you take part in this program?	1	0	9	D6b_____
c. **IF YES** Was is a do-it-yourself project or did you pay someone else to help you do it?				
Do it yourself 1 - GO TO E Paid Someone else 2 - CONTINUE Both 3 - CONTINUE				D6c ____
d. **IF PAID** Who did you pay or hire to do the work?				
Contractor 1 Retailer installer 4 Handyman 2 Other ___________________________ Relative 3				D6d ____
e. **ALL** (Now you are aware) Are you likely to take part in this program (again) in the next 12 months?	1	0	9	D6e_____

D7. A rebate when you upgrade the insulation in your basement or crawl space.				
	Yes	No	DK	
a. Were you aware of this program? IF NO GO TO E	1	0	9	D7a_____
b. **IF YES** Did you take part in this program?	1	0	9	D7b_____
c. **IF YES** Was is a do-it-yourself project or did you pay someone else to help you do it?				
Do it yourself 1 - GO TO E Paid Someone else 2 - CONTINUE Both 3 - CONTINUE				D7c ____

d. **IF PAID** Who did you pay or hire to do the work?				
Contractor 1 / Handyman 2 / Relative 3 — Retailer installer 4 / Other ______________________________				D7d ____
e. **ALL** (Now you are aware) Are you likely to take part in this program (again) in the next 12 months?	1	0	9	D7e_____
D8. A rebate when you upgrade the insulation in your attic.				
	Yes	No	DK	
a. Were you aware of this program? IF NO GO TO E	1	0	9	D8a _____
b. IF YES Did you take part in this program?	1	0	9	D8b _____
c. IF YES Was is a do-it-yourself project or did you pay someone else to help you do it?				
Do it yourself 1 - GO TO E / Paid Someone else 2 - CONTINUE / Both 3 - CONTINUE				D8c ____
d. IF PAID Who did you pay or hire to do the work?				
Contractor 1 / Handyman 2 / Relative 3 — Retailer installer 4 / Other ______________________________				D8d ____
e. ALL (Now you are aware) Are you likely to take part in this program (again) in the next 12 months?	1	0	9	D8e ____

IF THEY DID NOT TAKE PART IN ANY PROGRAMS GO TO PART Z DEMOGRAPHICS

D9. IF THEY TOOK PART IN ANY OF THE PROGRAMS				
	YES	NO	DK	
D9a. Did you apply for Energy Saver's rebates on any of your purchases or installations?	1	0	9	D9a_____
IF YES GO TO D11 – BELOW				
D9b. **IF NO** Why didn't you apply for the rebate? Would you say it was mainly because				

( )	**(READ LIST)** Too much trouble/hassle	1	D9b1_____
( )	Not worth the effort/saving not large enough	2	D9b2_____
( )	Don't know what to do/how go about it	3	D9b3_____
( )	Wasn't aware of it	4	D9b4_____
( )	Just haven't gotten around to it	5	D9b5_____
( )	Wasn't available in my area	6	D9b6_____
( )	Am not available/eligible for the rebates (new home, oil/wood heat as main source, or rent)	7	D9b7_____

	Other_______ ______________________________________ ____	8	D9b8______

GO TO PART Z - DEMOGRAPHICS

D11. IF YES Which rebates did you apply for?	
____	D11.1______
____	D11.2______
____	D11.3______

D12. Where did you get your information about the rebate program? (READ LIST) (ROTATE)

( )	Retailer/building supply sales associate	1	D12.1______
( )	Retail In-store signage	7	D12.7______
( )	Website	2	D12.2______
( )	Advertising	3	D12.3______
( )	Word of mouth	4	D12.4______
( )	Bill insert	5	D12.5______
( )	Brochure	6	D12.6______
	Other ______________________________	8	D12.8______

D13. To what extent did you find your retailer helpful/knowledgeable about the rebate program? Would you say they were? (READ LIST) (ROTATE)

Very helpful/knowledgeable	1	D13_____
Somewhat helpful/knowledgeable	2	
Not helpful/knowledgeable	3	
DO NOT READ: (didn't interact with any staff from retailer)	8	
DO NOT READ: (don't know/can't recall)	9	

PART Z: DEMOGRAPHICS

The following questions are used for classification purposes only.

SM1. Do you have a facebook account or twitter account that you use regularly?

Facebook	1	Both	3	SM1_______
Twitter	2	Neither	4	

→ → **Z1a**. In what year were you born? Year of Birth **Z1a**______

Z1b. **IF REFUSED AGE:** TO which of the following age groups do you belong? (**READ LIST**)

18 to 24	1	50 to 64	4	Z1b _______
25 to 34	2	65 or more	6	
35 to 49	3	Refused	9	

Z2. What is the highest level of schooling that you have obtained? (**READ LIST**)

Less than high school	1	Some college or university	5	Z2_________
Completed high school	2	College or university degree/diploma	6	
Technical/vocational school above high school	3	Post-graduate degree (masters, doctorate, equivalent	7	

Z3. How many people currently reside in your home including yourself?

____________________ **Z3_______**

IF ONLY ONE GO TO Z5 (REFUSED =99)

Z4. Are there any children aged 18 years or less living in your household?

Yes 1 No 0 **Z4_______**

Z5. Which of the following best describes your current marital status?

Single /never married	1	Separated/Divorced	4	Z5 _______
Married	2	Widowed	6	
Common-law /living with a partner	3	Refused	9	

Z6. Which of the following broad income categories best describes your total household annual income? That is everyone's income combined before taxes. Just stop me when I have reached the right category **(READ LIST)**

Under $20,000	1	Under $60,000	5	Z6_______
Under $30,000	2	Under $70,000	6	
Under $40,000	3	Under $80,000	7	
under $50,000	4	More than $80,00	8	

Z7a. Do you own or rent your home? Own 1 Rent 2 (Refused 9) **Z7a_______**

Z7b. What type of dwelling do you live in?

Single dwelling house	1	Apartment /Flat (5-20 Units)	5	Z7b______
Semi-detached house	2	Apartment (20+ Units)	6	
Townhouse or Rowhouse	3	Mobile home/trailer	7	
Apartment/Flat (less than 5 units)	4	Other ____________________	8	

Z7c. Approximately how old is your home or dwelling? **(Don't Know = 999)** **Z7c**_______

(ROUND TO NEAREST YEAR)

Z8.**INTERVIEWER ONLY:** Male 1 Female 2 **Z8**_______

Z9. **LOCATION:** St. John's CMA 1 Labrador 2 Rest of Newfoundland 3 **Z9**_______

GO TO SURVEY CLOSE –PAGE 1

Appendix B

Part A - HOME HEATING

A1a. First of all, what is the main method you use to heat your home?

		Area: St. John's (n=200)	Area: Labrador (n=200)	Area: Rest of Province (n=200)	Total
A1a. First of all, what is the main method you use to heat your home?	Electricity	70.0%	85.6%	48.0%	58.4%
	Oil	26.0%	4.8%	20.5%	21.8%
	Wood	1.4%	9.6%	30.0%	18.0%
	Other	2.5%		1.5%	1.8%
Total		100.0%	100.0%	100.0%	100.0%

A1b1-2. What Secondary forms of home heating do you use?

		Area: St. John's (n=200)	Area: Labrador (n=200)	Area: Rest of Province (n=200)	Total (n=600)
a1b Secondary forms home heating	Electricity	8%	4%	15%	12%
	Oil	1%	4%	11%	7%
	Wood	10%	7%	13%	11%
	Propane Fireplace	12%	2%	5%	7%
	Other		1%	2%	1%
Total (n=600)		100%	100%	100%	100%

Note: More than one response allowed.

a1c -% of Home heating costs used on... Electricity

		Area: St. John's (n=200)	Area: Labrador (n=200)	Area: Rest of Province (n=200)	Total (n=600)
% electric -categories	Zero	22%	11%	37%	30%
	25% or less	7%	3%	12%	9%
	26% - 50%	3%	1%	7%	5%
	51% - 75%	3%	3%	4%	4%
	76% - 99%	10%	5%	6%	7%
	100 %	55%	78%	35%	45%
Total		100%	100%	100%	100%

a1c2 % of Home heating costs used on... Oil

		Area			
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	Total (n=600)
% Oil -categories	Zero	73%	92%	68%	72%
	25% or less	1%	3%	8%	5%
	26% - 50%	1%	2%	6%	4%
	51% - 75%	4%	2%	2%	2%
	76% - 99%	5%		4%	4%
	100%	16%	3%	13%	13%
Total		100%	100%	100%	100%

a1c3 % of Home heating costs used on... Wood

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
% Wood -categories	Zero	89%	84%	58%	71%
	25% or less	5%	3%	6%	5%
	26% - 50%	4%	4%	9%	7%
	51% - 75%	1%	2%	6%	4%
	76% - 99%	1%	4%	14%	9%
	100%		4%	9%	5%
Total		100%	100%	100%	100%

a1c4 % of Home heating costs used on... Propane Fireplace

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
% Propane fireplace - categories	Zero	88%	99%	96%	93%
	25% or less	11%	2%	4%	6%
	26% - 50%	1%		1%	1%
Total		100%	100%	100%	100%

a1c5 % of Home heating costs used on... Kerosene

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
% Kerosene -categories	Zero	100%	100%	100%	100%
Total		100%	100%	100%	100%

a1c6 % of Home heating costs used on... Other

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
% Other -categories	Zero	98%	100%	97%	97%
	25% or less		1%	2%	1%
	26% - 50%			1%	0%
	51% - 75%	1%			0%
	76% - 99%	1%		1%	1%
	100%	1%		1%	1%
Total		100%	100%	100%	100%

A2a. How familiar are you with the amount of money you pay for the electricity you use?

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
A2a. How familiar are you with the amount of money you pay for the electricity you use?	Very Familiar	83%	77%	88%	86%
	Somewhat Familiar	15%	16%	11%	13%
	Included in Rent - N/A	2%	8%	1%	1%
Total		100%	100%	100%	100%

a2b- Average monthly winter electric bill- categories?

		Area: St. John's (n=200)	Area: Labrador (n=200)	Area: Rest of Province (n=200)	Total (n=600)
heat cost category	< $130	21%	21%	30%	26%
	$130 - $199	17%	26%	21%	19%
	$200 - $299	17%	31%	16%	17%
	$300 - $399	28%	11%	18%	21%
	$400 - $850	16%	3%	14%	14%
	Don't Know	2%	9%	3%	3%
Total		100%	100%	100%	100%

a3a - Do you have either a heat recovery ventilator (HRV) or an air exchanger installed in your home?

		Area: St. John's (n=200)	Area: Labrador (n=200)	Area: Rest of Province (n=200)	Total (N=600)
A3a. Do you have either a heat recovery ventilator (HRV) or an air exchanger installed in your home?	No	52%	67%	77%	67%
	Yes - HRV	9%	7%	9%	9%
	Yes-Air Exchanger	37%	26%	14%	23%
	Yes - Both HRV & AE	2%	1%		1%
	Don't Know		1%	1%	0%
Total		100%	100%	100%	100%

a3b - IF YES: How old is your heat recovery ventilator?

		Area: St. John's (n=21)▼	Area: Labrador (n=14)▼	Area: Rest of Province (n=18)▼	Total (N=53)
A3b. IF YES, How old is your heat recovery ventilator HRV?	Less than 5 years old	33%	29%	28%	30%
	5-15 Years	48%	50%	67%	58%
	15 Years or older	19%	21%	6%	12%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

a3c – IF YES: How do you use your heat recovery ventilator ... ?

		Area			Total (N=53)
		St. John's (n=21)▼	Labrador (n=14)▼	Rest of Province (n=18)▼	
A3c. Which of the following best describes how you use your heat recovery ventilator HRV?	Always turned on	67%	50%	67%	66%
	Turned off occasionally or for short periods	19%	14%	28%	24%
	Turned off for several months at a time	14%	36%	6%	10%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

a3d - Is your current heat recovery ventilator (HRV) an energy efficient model?

		Area			Total (N=53)
		St. John's (n=21)▼	Labrador (n=14)▼	Rest of Province (n=18)▼	
A3d. As far as you know, is your current heat recovery ventilator (HRV) an energy efficient model?	No	14%	36%	17%	16%
	Yes	62%	57%	78%	70%
	Don't Know	24%	7%	6%	13%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

a3e - Do you have plans to replace your heat recovery ventilator within the next 5 years?

		Area			Total (N=53)
		St. John's (n=21)▼	Labrador (n=14)▼	Rest of Province (n=18)▼	
A3e . Do you have any plans to replace your heat recovery ventilator within the next 5 yrs?	No	86%	86%	83%	84%
	Yes	10%	7%	17%	13%
	Don't Know	5%	7%		2%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

a3f – IF YES: How likely are you to purchase an energy efficient HRV model?

		Area			Total
		St. John's (n=3)▼	Labrador (n=2)▼	Rest of Province (n=3)▼	(N=8)▼
A3f. IF YES/DK How likely are you to purchase an energy efficient HRV model?	Very Likely	100%	100%	100%	100%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

a3g - What would help you or make it more likely for you to upgrade to an energy efficient HRV with the next 5 years?

		Area			Total (n=53)
		St. John's (n=21)▼	Labrador (n=14)▼	Rest of Province (n=18)▼	
a3g - What would help you or make it more likely for you to upgrade to an energy efficient HRV with the next 5 years?	Rebate	10%	7%	11%	10%
	Coupon	5%		6%	5%
	Information/advice		7%		0%
	Save Energy	5%			2%
	Save Money		7%	6%	3%
	Other	10%		11%	10%
	Nothing	76%	79%	72%	74%
Total (n=600)		100%	100%	100%	100%

Note: More than one response allowed. ▼Percentages should be viewed with caution due to small sample sizes (N<30)

a3bb - How old is your air exchanger?

		Area			Total (N=156)
		St. John's (n=77)	Labrador (n=52)	Rest of Province (n=27)▼	
A3bb. IF a3a yes Air Exchanger, How old is your air exchanger? Is it ….READ LIST	Less than 5 years old	27%	27%	37%	30%
	5-15 Years	49%	56%	37%	46%
	15 Years or older	23%	17%	26%	24%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

a3cc – IF YES: How do you use your air exchanger?

		Area			Total (N=156)
		St. John's (n=77)	Labrador (n=52)	Rest of Province (n=27)▼	
A3cc. Which of the following best describes how you use your air exchanger?	Always turned on	57%	54%	52%	55%
	Turned off occasionally or for short periods	32%	23%	22%	29%
	Turned off for several months at a time	10%	23%	26%	16%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

a3dd - Is your current air exchanger an energy efficient model?

		Area			Total (N=156)
		St. John's (n=77)	Labrador (n=52)	Rest of Province (n=27)▼	
A3dd. As far as you know, is your current air exchanger an energy efficient model?	No	22%	15%	15%	19%
	Yes	58%	52%	52%	56%
	Don't Know	19%	33%	33%	25%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

a3ee - Do you have any plans to replace your air exchanger within the next 5 years?

		Area			Total (N=156)
		St. John's (n=77)	Labrador (n=52)	Rest of Province (n=27)▼	
A3ee . Do you have any plans to replace your air exchanger within the next 5 yrs?	No	82%	88%	85%	83%
	Yes	13%	10%		9%
	Don't Know	5%	2%	15%	8%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

a3ff – IF YES: How likely are you to purchase an energy efficient air exchanger model?

		Area			Total (N=24)▼
		St. John's (n=14)▼	Labrador (n=6)▼	Rest of Province (n=4)▼	
A3ff. IF YES/DK How likely are you to purchase an energy efficient air exchanger model?	Very Likely	93%	67%	75%	87%
	Somewhat Likely	7%	33%		6%
	Not at all Likely			25%	7%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

a3gg - What would help you or make it more likely for you to upgrade to an energy efficient air exchanger with the next 5 years?

		Area			Total (N=156)
		St. John's (n=77)	Labrador (n=52)	St. John's (n=77)	
a3gg - What would help you or make it more likely for you to upgrade to an energy efficient air exchanger with the next 5 years?	1 Rebate	9%	12%	15%	11%
	2 Coupon	3%	2%		2%
	3 Assistance for installation	1%		7%	3%
	4 Information/advice	1%		4%	2%
	5 Save Energy	1%		4%	2%
	6 Save Money	8%		4%	6%
	20 Other	1%	4%		1%
	100 Nothing	81%	83%	74%	79%
Total (n=600)		100%	100%	100%	100%

Note: More than one response allowed.

A4A - Would you say always, sometimes, rarely or never make a conscious effort to reduce how much electricity you use?

		Area			Total (N=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
A4a. Would you say (READ LIST) always, sometimes, rarely or never make a conscious effort to reduce how much electricity you use?	Never	8%	16%	12%	11%
	Rarely	2%	9%	6%	5%
	Sometimes	24%	22%	23%	23%
	Always	65%	53%	59%	61%
Total		100%	100%	100%	100%

A4b. Main reason you try to reduce or manage your use of electricity in your household?

	Area			Total
a4b Main Reason for Reducing Electricity Use	St. John's (n=179)	Labrador (n=150)	Rest of Province (n=164)	(n=493)
To save money or lower bill	95%	86%	95%	94%
To help the environment	10%	15%	8%	9%
To save or conserve energy	13%	18%	12%	13%
Not trying to reduce use		1%		0%
Other	1%	1%	1%	1%
Total	100%	100%	100%	100%

Note: More than one response allowed.

Part B - HOME ENERGY AWARENESS AND PRACTICES

B1a.- Are you aware of any advertising campaigns in Newfoundland and Labrador promoting energy saving products and tips to save energy?

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
B1a. Are you aware of any advertising campaigns	No	45%	46%	55%	51%
	Yes	54%	54%	44%	49%
Total		100%	100%	100%	100%

B1b (1-2). What is the name of this energy saving advertising campaign?

		Area			Total (n=306)
		St. John's (n=109)	Labrador (n=108)	Rest of Province (n=89)	
B1b1 to 2	takeCHARGE	9%	9%	9%	9%
	NF Power campaign	53%	2%	40%	44%
	NF and Labrador Hydro campaign	12%	56%	15%	16%
	Federal government campaign	1%		1%	1%
	Provincial government campaign	4%	3%	1%	2%
	Energy Savers Rebate	5%	6%	6%	5%
	Turn Back the Tide-2013		1%	1%	1%
	Other	6%	14%	10%	9%
	Don' Know	14%	20%	24%	19%
Total		100%	100%	100%	100%

Note: More than one response allowed.

B2 RESPONSE TO THESE HOME ENERGY SAVING PRODUCTS, FEATURES OR INITIATIVES

B2.1 - Installing foam gaskets behind outlet covers and switch plates.

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
B2.1. Installing foam gaskets behind outlet covers and switch plates.	Never thought about this Change	52%	53%	62%	58%
	Interest in this change but not in next year	2%	4%	4%	3%
	Planning this change within next year	1%	3%	3%	2%
	Already made this change less than a year ago	5%	4%	5%	5%
	Already made this change more than one year ago	38%	38%	27%	32%
Total		100%	100%	100%	100%

B2.2 - Replacing weather stripping on exterior doors.

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
B2.2. Replacing weather stripping on exterior doors.	Never thought about this Change	25%	24%	30%	28%
	Interest in this change but not in next year	4%	5%	4%	4%
	Planning this change within next year	5%	5%	5%	5%
	Already made this change less than a year ago	13%	16%	15%	14%
	Already made this change more than one year ago	51%	52%	47%	49%
Total		100%	100%	100%	100%

B2.3 - Caulking around vents or windows to reduce drafts.

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
B2.3. Caulking around vents or windows to reduce drafts.	Never thought about this Change	26%	25%	24%	25%
	Interest in this change but not in next year	3%	4%	3%	3%
	Planning this change within next year	2%	2%	5%	4%
	Already made this change less than a year ago	12%	15%	12%	12%
	Already made this change more than one year ago	55%	55%	57%	56%
Total		100%	100%	100%	100%

B2.4 - Installing motion detectors or timers on exterior lighting.

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
B2.4. Installing motion detectors or timers on exterior lighting.	Never thought about this Change	66%	65%	76%	72%
	Interest in this change but not in next year	2%	3%	2%	2%
	Planning this change within next year	2%	2%	1%	1%
	Already made this change less than a year ago	6%	6%	4%	5%
	Already made this change more than one year ago	23%	26%	17%	20%
Total		100%	100%	100%	100%

B2.5 - Installing foam insulation on hot water pipes.

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
B2.5. Installing foam insulation on hot water pipes.	Never thought about this Change	59%	61%	61%	60%
	Interest in this change but not in next year	2%	2%	4%	3%
	Planning this change within next year	2%	3%	1%	2%
	Already made this change less than a year ago	4%	3%	4%	4%
	Already made this change more than one year ago	31%	32%	31%	31%
	Don't Know	0%		1%	0%
Total		100%	100%	100%	100%

B2.6 - Switching to cold water washing.

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
B2.6. Switching to cold water washing.	Never thought about this Change	20%	18%	9%	14%
	Interest in this change but not in next year		1%		0%
	Planning this change within next year	1%			0%
	Already made this change less than a year ago	3%	2%	2%	2%
	Already made this change more than one year ago	76%	81%	89%	84%
Total		100%	100%	100%	100%

B2.7 - Line-drying clothes rather than use the dryer.

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
B2.7. Line-drying clothes rather than use the dryer.	Never thought about this Change	22%	45%	24%	24%
	Interest in this change but not in next year		1%		0%
	Planning this change within next year	0%	1%	1%	1%
	Already made this change less than a year ago	1%	2%	2%	2%
	Already made this change more than one year ago	75%	53%	74%	73%
Total		100%	100%	100%	100%

B2.8 - Setting back thermostats at night or when away from home.

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
B2.8. Setting back thermostats at night or when away from home.	Never thought about this Change	17%	30%	24%	22%
	Interest in this change but not in next year	0%			0%
	Planning this change within next year	4%	4%	2%	3%
	Already made this change less than a year ago	78%	67%	74%	76%
Total		100%	100%	100%	100%

B2.9a - Replacing indoor light bulbs with compact fluorescent light bulbs

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
B2.9a. Replacing indoor light bulbs with compact fluorescent light bulbs.	Never thought about this Change	26%	26%	21%	23%
	Interest in this change but not in next year	0%		2%	1%
	Planning this change within next year	0%	1%	2%	1%
	Already made this change less than a year ago	9%	7%	12%	11%
	Already made this change more than one year ago	63%	67%	64%	64%
Total		100%	100%	100%	100%

B2.9b - Replacing outdoor light bulbs with compact fluorescent light bulbs

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
B2.9b. Replacing outdoor light bulbs with compact fluorescent light bulbs.	Never thought about this Change	36%	37%	39%	38%
	Interest in this change but not in next year	2%	3%	3%	3%
	Planning this change within next year		1%	1%	0%
	Already made this change less than a year ago	8%	7%	8%	8%
	Already made this change more than one year ago	52%	53%	50%	51%
Total		100%	100%	100%	100%

B2.10 - Replacing light bulbs with dimmable compact fluorescent light bulbs.

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
B2.10. Replacing light bulbs with dimmable compact fluorescent light bulbs.	Never thought about this Change	77%	80%	76%	77%
	Interest in this change but not in next year	2%	1%	2%	2%
	Planning this change within next year	1%			1%
	Already made this change less than a year ago	3%	3%	3%	3%
	Already made this change more than one year ago	15%	17%	19%	17%
Total		100%	100%	100%	100%

B2.11 - Replacing light bulbs with LED light bulbs.

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
B2.11. Replacing light bulbs with LED light bulbs.	Never thought about this Change	80%	76%	84%	82%
	Interest in this change but not in next year	1%	2%	1%	1%
	Planning this change within next year	1%	1%	2%	1%
	Already made this change less than a year ago	8%	4%	3%	5%
	Already made this change more than one year ago	10%	17%	11%	11%
Total		100%	100%	100%	100%

B2.12 - Replacing a regular shower head with a low flow shower head.

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
B2.12. Replacing a regular shower head with a low flow shower head.	Never thought about this Change	48%	48%	45%	46%
	Interest in this change but not in next year	2%	2%	3%	3%
	Planning this change within next year	0%	2%	3%	2%
	Already made this change less than a year ago	8%	9%	11%	9%
	Already made this change more than one year ago	40%	40%	38%	39%
	Don't Know	0%			0%
Total		100%	100%	100%	100%

B2.13 - Installing extra insulation around a hot water tank.

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
B2.13. Installing extra insulation around a hot water tank.	Never thought about this Change	71%	68%	71%	71%
	Interest in this change but not in next year	3%	1%	3%	3%
	Planning this change within next year	1%	3%	1%	1%
	Already made this change less than a year ago	0%	3%	3%	2%
	Already made this change more than one year ago	23%	26%	23%	23%
	Don't Know	0%			0%
Total		100%	100%	100%	100%

B2.14a - Purchasing ENERGY STAR appliances such as stove, fridge, washer?

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
B2.14a. Purchasing ENERGY STAR appliances such as stove, fridge, washer ?	Never thought about this Change	32%	31%	33%	33%
	Interest in this change but not in next year	0%	3%	4%	3%
	Planning this change within next year	3%	1%	2%	2%
	Already made this change less than a year ago	9%	14%	14%	12%
	Already made this change more than one year ago	54%	52%	47%	50%
Total		100%	100%	100%	100%

B2.14b - Purchasing ENERGY STAR electronic devices such as TVs, battery chargers, DVD's, audio players.

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
B2.14b. Purchasing ENERGY STAR electronic devices such as TVS, battery chargers, DVD's, audio players.	Never thought about this Change	55%	49%	53%	54%
	Interest in this change but not in next year	1%	4%	5%	3%
	Planning this change within next year	1%	2%	2%	2%
	Already made this change less than a year ago	13%	13%	12%	12%
	Already made this change more than one year ago	28%	34%	29%	29%
	Don't Know	0%			0%
Total		100%	100%	100%	100%

B2.15 Purchasing other ENERGY STAR labeled products such as power bars, ceiling fans and light fixtures

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
B2.15. Purchasing other ENERGY STAR labeled products such as power bars, ceiling fans and light fixtures.	Never thought about this Change	70%	59%	66%	67%
	Interest in this change but not in next year	3%	5%	4%	3%
	Planning this change within next year	0%	3%	3%	2%
	Already made this change less than a year ago	10%	9%	8%	9%
	Already made this change more than one year ago	16%	25%	20%	19%
Total		100%	100%	100%	100%

B2.16 Switching to LED lights for Christmas.

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
B2.16. Switching to LED lights for Christmas	Never thought about this Change	32%	31%	36%	34%
	Interest in this change but not in next year	1%	1%	2%	2%
	Planning this change within next year	2%	1%	2%	2%
	Already made this change less than a year ago	6%	4%	8%	7%
	Already made this change more than one year ago	58%	64%	52%	55%
Total		100%	100%	100%	100%

b3a - What if any other energy efficient changes have you made to your home in the past year?

	Area			Total (n=600)
	St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
Programmable Thermostat	2%	3%	2%	2%
High Performance Thermostat	0%			0%
Windows – replaced old ones	3%	4%	4%	4%
Insulation – basement/floors	3%	1%	6%	4%
Insulation – attic	1%	2%	1%	1%
Insulation – walls/ new siding	3%	5%	2%	3%
Roof – replaced/repaired	0%	2%		0%
Doors – replaced with steel	1%	1%	5%	3%
Heating system – fans,	1%		1%	1%
Other renovations (eg Bathroom)	0%		1%	0%
Thermostat is kept turned down		1%		0%
Use timers (eg Block heater)	0%	2%		0%
Use manual (eg Lawn mower)			1%	0%
Use blankets to cover drafts off	2%	1%		1%
Use smaller appliances instead of larger ones	0%			0%
100 No (Other) EE Changes past year	84%	86%	85%	85%
Total (n=600)	100%	100%	100%	100%

Note: More than one response allowed.

b3b - Why did you make this change?

		Area			Total (n=91)
		St. John's (n=32)	Labrador (n=29)▼	Rest of Province (n=30)	
b3b1 to 3	Rebate	9%	7%	13%	11%
	Coupon		3%		0%
	Friend/Family Member			3%	2%
	Save Energy	50%	45%	40%	44%
	Save Money	56%	48%	53%	54%
	Old, drafty, keep heat in, comfort	25%	38%	27%	27%
	Other	6%	7%	3%	5%
Total (n=600)		100%	100%	100%	100%

Note: More than one response allowed. ▼Percentages should be viewed with caution due to small sample sizes (N<30)

b4a - Have you redeemed or used any coupons in the past year?

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
B4a . Have you redeemed or used any coupons in the past year?	No	61%	78%	67%	66%
	Yes	38%	21%	33%	34%
	Don't Know	0%	1%		0%
Total		100%	100%	100%	100%

b4b. Would you use a coupon to purchase an energy efficient product?

		Area			Total (n=184)
		St. John's (n=77)	Labrador (n=42)	Rest of Province (n=65)	
B4b. IF YES Would you use a coupon to purchase and energy efficient product?	No	6%		3%	4%
	Yes	91%	98%	88%	89%
	Don't Know	3%	2%	9%	6%
Total		100%	100%	100%	100%

PART C. AWARENESS OF ENERGY SAVING PROGRAMS & PROMOTIONS

c1a1 - Have you ever heard of the takeCHARGE program?

		Area			Total (N=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
C1a1. Newfoundland Power and Newfoundland and Labrador Hydro's energy saving campaign is called takeCHARGE. First… Have you ever heard of the takeCHARGE program?	No	30%	30%	40%	36%
	Yes	70%	70%	60%	64%
	Don't Know		1%		0%
Total		100%	100%	100%	100%

c1a3 - IF YES Have you heard or seen anything related to the takeCHARGE campaign in the past year?

		Area			
		St. John's (n=140)	Labrador (n=139)	Rest of Province (n=120)	Total (N=399)
C1a3. IF YES Have you heard or seen Anything Related to the takeCHARGE campaign in the past year?	No	23%	13%	23%	23%
	Yes	76%	85%	75%	76%
	Don't Know	1%	2%	2%	2%
Total		100%	100%	100%	100%

c1b1 - IF YES Where do you recall seeing or hearing anything about the takeCHARGE advertising campaign - First Mention

		Area			
		St. John's (n=106)	Labrador (n=118)	Rest of Province (n=90)	Total (N=314)
C1b1. IF YES TO ANY ABOVE Where do you recall seeing or hearing about the takeCHARGE advertising campaign - First mention	takeCHARGE Website	1%	4%	2%	2%
	Bill inserts	29%	34%	36%	33%
	Facebook		1%	1%	1%
	Television	50%	36%	44%	46%
	Radio	5%		3%	4%
	Newspaper	6%	7%	2%	4%
	Building supply or retail store	3%	4%	4%	4%
	Magazine or booklet			1%	1%
	Trade show or display	2%	2%	1%	1%
	Online advertising	1%	2%	2%	2%
	Word of mouth	3%	3%		1%
	Social Media			1%	1%
	Billboard		6%	1%	1%
	Don't Know	1%	1%		0%
Total		100%	100%	100%	100%

c1b - Where do you recall seeing or hearing about the takeCHARGE advertising campaign - Other Mentions

		Area			Total
		St. John's (n=106)	Labrador (n=118)	Rest of Province (n=90)	(n=314)
c1b2 to 4	takeCHARGE Website	1%	1%	4%	3%
	Bill inserts	22%	21%	19%	20%
	Facebook		1%	2%	1%
	Television	17%	25%	21%	20%
	Radio	3%	6%	8%	6%
	Newspaper	8%	10%	7%	8%
	Building supply or retail store	1%	4%	6%	4%
	Magazine or booklet	1%	3%	2%	2%
	Trade show or display	2%	1%		1%
	Online advertising	6%	3%	2%	4%
	Word of mouth	2%	3%	6%	4%
	Social Media	1%			0%
	Billboard	1%	1%		0%
Total		100%	100%	100%	100%

Note: More than one response allowed.

c2a - takeCHARGE has a website at takechargenl.ca which gives information about energy saving tips and rebates. Are you aware of this site?

		Area			
		St. John's (n=140)	Labrador (n=139)	Rest of Province (n=120)	Total (N=399)
C2a. takeCHARGE has a web site at takechargenl.ca which gives information about energy saving tips and rebates. Are you aware of this program?	No	59%	64%	61%	60%
	Yes	41%	36%	38%	39%
	Don't Know			2%	1%
Total		100%	100%	100%	100%

c2b - IF YES Have you ever visited this site?

		Area			
		St. John's (n=57)	Labrador (n=50)	Rest of Province (n=45)	Total (N=152)
C2b IF YES Have you ever visited this site?	No	65%	58%	62%	63%
	Yes	33%	42%	38%	36%
	Don't Know	2%			1%
Total		100%	100%	100%	100%

c2c - IF YES How regularly do you visit this site?

		Area			Total (N=57)
		St. John's (n=19)▼	Labrador (n=21)▼	Rest of Province (n=17)▼	
C2c. IF YES How regularly do you visit this site? READ LIST BELOW	At least once per week			12%	6%
	At least once per month	11%	10%	24%	17%
	At least once every few months		14%		1%
	Once or twice a year	37%	52%	24%	31%
	Do not visit regularly	53%	24%	41%	45%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

c2d - IF YES: When was the last time you visited the takeCharge site?

		Area			Total (N=57)
		St. John's (n=19)▼	Labrador (n=21)▼	Rest of Province (n=17)▼	
C2d. When was the last time you visited the takeCHARGE site?	Within the last month	16%	14%	24%	20%
	Within the last six months	32%	33%	35%	34%
	Within the past year	11%	33%	24%	19%
	More than one year ago	42%	19%	18%	28%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

c3a - takeCHARGE also has a Facebook page. Are you aware of this page?

		Area			Total (N=399)
		St. John's (n=140)	Labrador (n=139)	Rest of Province (n=120)	
C3a. takeCHARGE also has a Facebook page. Are you aware of this facebook page?	No	92%	88%	84%	88%
	Yes	8%	12%	15%	12%
	Don't Know			1%	0%
Total		100%	100%	100%	100%

c3b - IF YES Have you ever visited this page?

		Area			Total (N=46)
		St. John's (n=11)▼	Labrador (n=17)▼	Rest of Province (n=18)▼	
C3b IF YES Have you ever visited the page?	No	82%	82%	67%	72%
	Yes	18%	18%	33%	28%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

c3c - IF YES How regularly do you visit this Facebook page?

		Area			Total (N=11) ▼
		St. John's (n=2) ▼	Labrador (n=3) ▼	Rest of Province (n=6) ▼	
C3c. IF YES How regularly do you visit the Facebook page? READ LIST BELOW	At least once per week		33%	50%	41%
	At least once per month	50%	33%	17%	23%
	Do not visit regularly	50%	33%	33%	36%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

c3d - IF YES: When was the last time you visited the takeCharge Facebook page?

		Area			Total (N=11) ▼
		St. John's (n=2) ▼	Labrador (n=3) ▼	Rest of Province (n=6) ▼	
C3d. When was the last time you visited the takeCHARGE Facebook page?	Within the last month	50%	67%	67%	64%
	Within the last six months	50%		17%	22%
	Within the past year			17%	13%
	More than one year ago		33%		1%
Total		100%	100%	100%	100%

c4a- Recall of a TV ad where you see talking thermostats, windows and insulation sitting in a director's chair on a TV set?

		Area			Total (N=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
C4a. Do you recall a TV ad where you see talking thermostats, windows and insulation sitting in a director's chair on a TV set?	No	39%	43%	42%	41%
	Yes	58%	55%	53%	55%
	Don't Know	2%	3%	5%	4%
Total		100%	100%	100%	100%

c4b - Main messages in this advertising campaign or material (talking thermostats, windows and insulation sitting in director's chair on a TV set)?

		Area: St. John's (n=117)	Area: Labrador (n=109)	Area: Rest of Province (n=106)	Total (n=332)
c4b1 to 3	Insulation can save you money	47%	37%	38%	41%
	There are things you can do to help reduce your energy use	54%	50%	37%	44%
	The gov't has programs to help you reduce your energy	1%	2%	5%	3%
	Useful tips and ideas	11%	11%	11%	11%
	Other	3%	2%	6%	4%
	Message was unclear	1%	5%	1%	1%
	Don't know or Can't remember	10%	13%	26%	19%
Total (n=600)		100%	100%	100%	100%

Note: More than one response allowed.

c4c - How effective do you think this advertising is?

		Area: St. John's (n=117)	Area: Labrador (n=109)	Area: Rest of Province (n=106)	Total (N=332)
C4c. Using a scale of 1 to 5 where 1 means not at all effective and 5 means very effective, how effective do you think thi s advertising is in supporting consumers in making energy efficient changes to their home ?	1 - Not at all Effective	7%	11%	16%	12%
	2	9%	6%	6%	7%
	3	34%	39%	35%	35%
	4	37%	25%	26%	31%
	5 - Very Effective	13%	18%	17%	15%
Total		100%	100%	100%	100%

c5 - Have you made any changes to try to reduce the amount of electricity you use as a result of seeing or hearing anything about the takeCHARGE campaign?

		Area: St. John's (n=117)	Area: Labrador (n=109)	Area: Rest of Province (n=106)	Total (N=332)
C5. Have you made any changes to try to reduce the amount of electricity you use as a result of seeing or hearing anything about the takeCHARGE campaign?	No	84%	83%	74%	78%
	Yes	15%	17%	23%	19%
	Don't Know	1%		4%	2%
Total		100%	100%	100%	100%

PART D - INFORMATION SOURCES & MEDIA USE

d1 - Where is the first place (or places) you would go to find information on energy efficient products, services or tips?

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
D1.1 to 3	On-line ads	1%	1%		1%
	Facebook	1%	2%	1%	1%
	Newspaper	1%	1%	1%	1%
	Radio	1%			0%
	Television	1%	1%	1%	1%
	Bill inserts or newsletter	3%	1%	2%	2%
	Store displays		3%	1%	1%
	Website	52%	63%	46%	53%
	An electric utility representative	23%	8%	20%	17%
	Trade shows	1%			0%
	Mall displays	1%			0%
	Provincial government department	2%	1%	1%	1%
	Federal government department	1%	1%	1%	1%
	Other	1%		1%	0%
	Friends/Family	12%	12%	16%	13%
	Advice from Retailers	11%	12%	16%	13%
	Don't Know	8%	6%	12%	9%
Total		100%	100%	100%	100%

Note: More than one response allowed.

D2A Ever Used as a source of information for energy efficient products, services or tips

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
D2A 1 TO 16 SOURCES EVER USED	Ever Used - On-line ads	11.5%	12.0%	8.0%	10.5%
	Facebook	4.5%	6.0%	7.0%	5.8%
	Newspaper	27.0%	26.5%	27.5%	27.0%
	Radio	32.5%	29.0%	34.0%	31.8%
	Television	53.0%	54.5%	53.0%	53.5%
	Bill inserts or newsletter	50.5%	50.5%	54.5%	51.8%
	Store displays	22.5%	24.5%	21.0%	22.7%
	Websites	38.0%	42.0%	34.0%	38.0%
	An electric utility representative	21.0%	17.0%	22.5%	20.2%
	Billboards	8.5%	4.0%	4.5%	5.7%
	Trade Shows	11.5%	3.5%	9.0%	8.0%
	Mall Displays	6.5%	6.5%	8.0%	7.0%
	Provincial Government department	13.0%	13.5%	13.5%	13.3%
	Federal Government department	8.0%	9.5%	8.0%	8.5%
	Other Social Media (i.e. Twitter)	1.0%	.5%	2.0%	1.2%
	Advice from retailers	31.5%	32.5%	28.0%	30.7%
Total		100.0%	100.0%	100.0%	100.0%

Note: More than one response allowed.

d2b1 Likelihood of using (again) as a source of information for energy efficient products, services or tips - Online Ads?

		Area			
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	Total (N=600)
D2b1. If you were looking for information on energy efficient products, services or tips how likely would you be to use this source (again) for information, On-line ads	Very Likely	10%	9%	13%	12%
	Somewhat Likely	15%	21%	11%	13%
	Not at all Likely	74%	71%	77%	76%
Total		100%	100%	100%	100%

d2b2 Likelihood of using (again) as a source of information for energy efficient products, services or tips- Facebook page?

		Area			
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	Total (N=600)
D2b2. Facebook?	Very Likely	8%	10%	10%	9%
	Somewhat Likely	10%	16%	10%	10%
	Not at all Likely	81%	75%	81%	81%
Total		100%	100%	100%	100%

d2b3 Likelihood of using (again) as a source of information for energy efficient products, services or tips- Newspapers?

		Area			
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	Total (N=600)
D2b3. Newspaper	Very Likely	26%	24%	21%	23%
	Somewhat Likely	29%	22%	32%	30%
	Not at all Likely	45%	54%	47%	47%
Total		100%	100%	100%	100%

d2b4 Likelihood of using (again) as a source of information for energy efficient products, services or tips - Radio

		Area			
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	Total (N=600)
D2b4. Radio	Very Likely	33%	24%	26%	28%
	Somewhat Likely	33%	31%	33%	33%
	Not at all Likely	34%	45%	42%	39%
Total		100%	100%	100%	100%

d2b5 Likelihood of using (again) as a source of information for energy efficient products, services or tips - Television?

		Area			
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	Total (N=600)
D2b5. Television	Very Likely	56%	54%	48%	52%
	Somewhat Likely	23%	22%	26%	25%
	Not at all Likely	20%	25%	26%	24%
Total		100%	100%	100%	100%

d2b6 Likelihood of using (again) as a source of information for energy efficient products, services or tips -

Bill inserts/Newsletters?

		Area			
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	Total (N=600)
D2b6. Bill inserts or newsletter	Very Likely	49%	55%	52%	51%
	Somewhat Likely	26%	19%	20%	22%
	Not at all Likely	24%	27%	28%	27%
Total		100%	100%	100%	100%

d2b7a Likelihood of using (again) as a source of information for energy efficient products, services or tips - Store displays?

		Area			
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	Total (N=600)
D2b7a. Store displays or advice from retailers	Very Likely	19%	23%	17%	18%
	Somewhat Likely	29%	24%	32%	30%
	Not at all Likely	51%	54%	51%	52%
Total		100%	100%	100%	100%

d2b7b Likelihood of using (again) as a source of information for energy efficient products, services or tips - Advice from retailers?

		Area			
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	Total (N=600)
D2b7b. Advice from retailers	Very Likely	35%	34%	40%	38%
	Somewhat Likely	25%	24%	18%	21%
	Not at all Likely	39%	42%	42%	41%
Total		100%	100%	100%	100%

d2b8 Likelihood of using (again) as a source of information for energy efficient products, services or tips - Website?

		Area			
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	Total (N=600)
D2b8. Websites	Very Likely	46%	48%	42%	44%
	Somewhat Likely	12%	17%	6%	9%
	Not at all Likely	41%	35%	51%	47%
Total		100%	100%	100%	100%

d2b9 Likelihood of using (again) as a source of information for energy efficient products, services or tips - Electric utility rep?

		Area			
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	Total (N=600)
D2b9. An electric utility representative	Very Likely	38%	24%	36%	37%
	Somewhat Likely	19%	24%	17%	18%
	Not at all Likely	42%	53%	47%	45%
Total		100%	100%	100%	100%

d2b10 Likelihood of using (again) as a source of information for energy efficient products, services or tips - Billboards?

		Area			
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	Total (N=600)
D2b10. Billboards	Very Likely	5%	5%	2%	3%
	Somewhat Likely	21%	12%	13%	16%
	Not at all Likely	73%	84%	85%	81%
Total		100%	100%	100%	100%

d2b11 Likelihood of using (again) as a source of information for energy efficient products, services or tips - Trade Shows?

		Area			
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	Total (N=600)
D2b11. Trade Shows	Very Likely	13%	6%	7%	9%
	Somewhat Likely	14%	10%	9%	11%
	Not at all Likely	73%	85%	84%	80%
Total		100%	100%	100%	100%

d2b12 Likelihood of using (again) as a source of information for energy efficient products, services or tips - Mall Displays?

		Area			
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	Total (N=600)
D2b12. Mall Displays	Very Likely	3%	7%	6%	5%
	Somewhat Likely	21%	14%	13%	16%
	Not at all Likely	75%	80%	81%	79%
Total		100%	100%	100%	100%

d2b13 Likelihood of using (again) as a source of information for energy efficient products, services or tips - Provincial Government Dept.?

		Area			
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	Total (N=600)
D2b13. Provincial Government department	Very Likely	13%	12%	11%	12%
	Somewhat Likely	22%	18%	18%	19%
	Not at all Likely	64%	71%	72%	69%
Total		100%	100%	100%	100%

d2b14 Likelihood of using (again) as a source of information for energy efficient products, services or tips - Federal Government Dept.?

		Area			
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	Total (N=600)
D2b14. Federal Government department	Very Likely	8%	10%	8%	8%
	Somewhat Likely	19%	14%	14%	16%
	Not at all Likely	72%	77%	78%	76%
Total		100%	100%	100%	100%

d2b15 Likelihood of using (again) as a source of information for energy efficient products, services or tips - Other social media?

		Area			
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	Total (N=600)
D2b15. Other Social Media (i.e. Twitter)	Very Likely	1%	3%	2%	2%
	Somewhat Likely	2%	2%	1%	2%
	Not at all Likely	96%	96%	97%	97%
Total		100%	100%	100%	100%

d3 - Of all the sources available what would be the best way(s) to reach you with information on energy efficiency?

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
D3.1 to 3	On-line ads	2%		1%	1%
	Facebbok	1%	9%	2%	2%
	Newspaper	3%	3%	4%	3%
	Radio	4%	4%	4%	4%
	Television	12%	18%	17%	15%
	Bill inserts or newsletter	51%	50%	54%	53%
	Store displays		1%	1%	0%
	Website	14%	10%	12%	12%
	An electric utility representative	7%	7%	4%	5%
	Billboards	0%			0%
	Trade shows	0%	1%		0%
	Mall displays			1%	0%
	Provincial government department		1%	2%	1%
	Federal government department			1%	1%
	Other social media like twitter		1%	1%	0%
	Other	0%	1%		0%
	Friends/Family	0%	1%	5%	3%
	Email	26%	29%	24%	25%
	Advice from Retailers	2%	2%	2%	2%
	Don't Know	2%	2%	2%	2%
Total		100%	100%	100%	100%

Note: More than one response allowed.

d3b - Who should provide you with information on energy efficiency?

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
	Newfoundland Power	58%	10%	50%	51%
	Newfoundland & Labrador Hydro	8%	58%	13%	13%
	Electric Utility company	4%	6%	5%	4%
	Federal Government	10%	12%	14%	12%
	Provincial Government	30%	32%	31%	31%
	Other	2%	1%	2%	2%
	Don't Know	3%	3%	6%	4%
Total		100%	100%	100%	100%

Note: More than one response allowed.

d3c - Who should be delivering programs such as incentives, rebates, or financing plans to improve the energy efficiency of your home?

		Area			Total (n=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
D3C1 to 2	Newfoundland Power	40%	5%	41%	39%
	Newfoundland & Labrador Hydro	7%	51%	8%	10%
	Electric Utility company	2%	3%	3%	3%
	Federal Government	23%	17%	25%	24%
	Provincial Government	56%	49%	47%	51%
	Other	0%	1%	3%	2%
	Don't Know	1%	3%	6%	4%
Total		100%	100%	100%	100%

Note: More than one response allowed.

PART D - takeCHARGE PROGRAMS

D4. PROGRAMMABLE THERMOSTATS

d4a - rebate when you purchase a programmable thermostat: Were you aware of this program?

		Area			Total (N=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
D4a. A rebate when you purchase a programmable thermostat: Were you aware of this program?	No	56%	68%	62%	60%
	Yes	43%	33%	37%	39%
	Don't Know			1%	0%
Total		100%	100%	100%	100%

d4b - IF YES: Did you take part in the program?

		Area			Total (N=226)
		St. John's (n=87)	Labrador (n=65)	Rest of Province (n=74)	
D4b. IF YES Did you take part in the program?	No	85%	91%	96%	91%
	Yes	15%	8%	4%	9%
	Don't Know		2%		0%
Total		100%	100%	100%	100%

d4c - IF YES: Was it a do-it-yourself project or did you pay someone else to help you do it?

		Area			Total (N=21)▼
		St. John's (n=13)▼	Labrador (n=5)▼	Rest of Province (n=3)▼	
D4c. Was is a do-it-yourself project or did you pay someone else to help you do it?	Do it yourself	77%	100%	67%	75%
	Paid someone else	15%			11%
	Both	8%		33%	14%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

d4d - IF PAID: Who did you pay or hire to do the work?

		Area			Total (N=4)▼
		St. John's (n=3)▼	Labrador (n=0)	Rest of Province (n=1)▼	
D4d. IF PAID Who did you pay to have do the work?	Contractor	100%			67%
	Relative			100%	33%
Total		100%		100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

d4e - ALL (Now you are aware) Are you likely to take part in this program (again) in the next 12 months?

		Area			Total (N=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
D4e. ALL (Now you are aware) Are you likely to take part in this program (again) in the next 12 months ?	No	75%	72%	67%	70%
	Yes	18%	23%	27%	23%
	Don't Know	7%	6%	7%	7%
Total		100%	100%	100%	100%

D5 HIGH PERFORMANCE THERMOSTAT

d5a - A rebate when you purchase a High Performance thermostat: Were you aware of this program?

		Area			Total (N=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
D5a. A rebate on the purchase of high performance electronic thermostats: Were you aware of this program?	No	82%	85%	81%	82%
	Yes	17%	14%	19%	18%
	Don't Know	0%	1%		0%
Total		100%	100%	100%	100%

d5b - IF YES Did you take part in the program?

		Area			Total (N=100)
		St. John's (n=34)	Labrador (n=28) ▼	Rest of Province (n=38)	
D5b. IF YES Did you take part in the program?	No	94%	93%	100%	98%
	Yes	6%	7%		2%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

d5c - IF YES Was it a do-it-yourself project or did you pay someone else to help you do it?

		Area			Total (N=4)▼
		St. John's (n=2)▼	Labrador (n=2)▼	Rest of Province (n=0)	
D5c. Was is a do-it-yourself project or did you pay someone else to help you do it?	Do it yourself	100%	100%		100%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

d5d - IF PAID: Who did you pay or hire to do the work?

NOT APPLICABLE - (NO RESPONDENTS ANSWERED THE QUESTION)

d5e - ALL (Now you are aware) Are you likely to take part in this program (again) in the next 12 months?

		Area			Total (N=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
D5e. ALL (Now you are aware) Are you likely to take part in this program (again) in the next 12 months ?	No	87%	83%	80%	83%
	Yes	7%	14%	15%	12%
	Don't Know	6%	4%	5%	5%
Total		100%	100%	100%	100%

D6 ENERGY STAR WINDOWS

d6a - A rebate when you replace your old windows with ENERGY STAR windows: Were you aware of this program?

		Area			Total (N=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
D6a. A rebate when you replace your old windows with ENERGY STAR windows: Were you aware of this program?	No	59%	64%	57%	59%
	Yes	39%	37%	42%	41%
	Don't Know	1%			0%
Total		100%	100%	100%	100%

d6b - IF YES Did you take part in the program?

		Area			Total (N=237)
		St. John's (n=79)	Labrador (n=73)	Rest of Province (n=85)	
D6b. IF YES Did you take part in the program?	No	87%	89%	85%	86%
	Yes	13%	11%	14%	13%
	Don't Know			1%	1%
Total		100%	100%	100%	100%

d6c - IF YES: Was it a do-it-yourself project or did you pay someone else to help you do it?

		Area			Total (N=30)
		St. John's (n=10)▼	Labrador (n=8)▼	Rest of Province (n=12)▼	
Was is a do-it-yourself project or did you pay someone else to help you do it?	Do it yourself	20%	63%	50%	40%
	Paid someone else	80%	38%	50%	60%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

d6d - IF PAID: Who did you pay or hire to do the work?

		Area			
		St. John's (n=8) ▼	Labrador (n=3) ▼	Rest of Province (n=6) ▼	Total (N=17) ▼
D6d. IF PAID IF PAID Who did you pay or hire to do the work?	Contractor	75%	33%	67%	70%
	Handyman		33%	33%	18%
	Retailer installer	25%	33%		12%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

d6e - ALL (Now you are aware) Are you likely to take part in this program (again) in the next 12 months?

		Area			Total (N=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
D6e. ALL (Now you are aware) Are you likely to take part in this program (again) in the next 12 months ?	No	88%	85%	81%	84%
	Yes	10%	13%	14%	13%
	Don't Know	1%	3%	5%	4%
Total		100%	100%	100%	100%

D7 BASEMENT INSULATION

d7a - A rebate when you upgrade the insulation in your basement or crawl space: Were you aware of this program?

		Area			Total (N=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
D7a. A rebate when you upgrade the insulation in your basement or crawl space: Were you aware of this program?	No	59%	71%	61%	61%
	Yes	39%	30%	38%	38%
	Don't Know	1%			0%
Total		100%	100%	100%	100%

d7b - IF YES: Did you take part in the program?

		Area			Total (N=215)
		St. John's (n=79)	Labrador (n=59)	Rest of Province (n=77)	
D7b. IF YES Did you take part in the program?	No	89%	92%	94%	92%
	Yes	11%	8%	6%	8%
Total		100%	100%	100%	100%

d7c - IF YES: Was it a do-it-yourself project or did you pay someone else to help you do it?

		Area			Total (N=19) ▼
		St. John's (n=9) ▼	Labrador (n=5) ▼	Rest of Province (n=5) ▼	
Was is a do-it-yourself project or did you pay someone else to help you do it?	Do it yourself	78%	80%	40%	62%
	Paid someone else	22%	20%	60%	38%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

d7d - IF PAID: Who did you pay or hire to do the work?

		Area			Total (N=6) ▼
		St. John's (n=2) ▼	Labrador (n=1) ▼	Rest of Province (n=3) ▼	
D7d. IF PAID Who did you pay or hire to do the work?	Contractor	100%		67%	75%
	Handyman			33%	23%
	Retailer installer		100%		2%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

d7e - ALL (Now you are aware) Are you likely to take part in this program (again) in the next 12 months?

		Area			
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	Total (N=600)
D7e. ALL (Now you are aware) Are you likely to take part in this program (again) in the next 12 months ?	No	89%	84%	82%	85%
	Yes	8%	14%	15%	12%
	Don't Know	2%	2%	3%	3%
Total		100%	100%	100%	100%

D8 ATTIC INSULATION

d8a - A rebate when you upgrade the insulation in your attic: Were you aware of this program?

		Area			Total (N=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
D8a. A rebate when you upgrade the insulation in your attic: Were you aware of this program?	No	59%	72%	64%	63%
	Yes	40%	28%	36%	37%
	Don't Know	1%			0%
Total		100%	100%	100%	100%

d8b - IF YES: Did you take part in the program?

		Area			Total (N=208)
		St. John's (n=80)	Labrador (n=56)	Rest of Province (n=72)	
D8b. IF YES Did you take part in the program?	No	91%	91%	89%	90%
	Yes	9%	9%	11%	10%
Total		100%	100%	100%	100%

d8c - IF YES: Was it a do-it-yourself project or did you pay someone else to help you do it?

		Area			Total (N=20) ▼
		St. John's (n=7) ▼	Labrador (n=5) ▼	Rest of Province (n=8) ▼	
D8c. ALL (Now you are aware) Are you likely to take part in this program (again) in the next 12 months?	Do it yourself	71%	80%	75%	74%
	Paid someone else	29%	20%	25%	26%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

d8d - IF PAID: Who did you pay or hire to do the work?

		Area			Total (N=5) ▼
		St. John's (n=2) ▼	Labrador (n=1) ▼	Rest of Province (n=2) ▼	
D8d. IF PAID Who did you pay or hire to do the work?	Contractor	100%	100%	50%	71%
	Handyman			50%	29%
Total		100%	100%	100%	100%

▼Percentages should be viewed with caution due to small sample sizes (N<30)

d8e - ALL (Now you are aware) Are you likely to take part in this program (again) in the next 12 months?

		Area: St. John's (n=200)	Area: Labrador (n=200)	Area: Rest of Province (n=200)	Total (N=600)
D8e. ALL (Now you are aware) Are you likely to take part in this program (again) in the next 12 months ?	No	89%	87%	84%	86%
	Yes	9%	11%	15%	12%
	Don't Know	2%	2%	2%	2%
Total		100%	100%	100%	100%

Average number of programs taken part in - Participants Only

		Area: St. John's (n=30)	Area: Labrador (n=15) ▼	Area: Rest of Province (n=18) ▼	Total (n=63)
Avg # of Programs they Participated in - Participants Only	Minimum	1	1	1	1
	Maximum	3	4	3	4
	Mean	1	2	2	1
	Median	1	1	1	1

▼Percentages should be viewed with caution due to small sample sizes (N<30)

REBATE APPLICATIONS

d9a - IF THEY TOOK PART IN ANY OF THE PROGRAMS: Did you apply for Energy Saver's rebates on any of your purchases or installations?

		Area: St. John's (n=30)	Area: Labrador (n=15)	Area: Rest of Province (n=18)	Total (N=63)
D9a. IF THEY TOOK PART IN ANY OF THE PROGRAMS: Did you apply for Energy Saver's rebates on any of your purchases or installations?	No	3%	13%	11%	7%
	Yes	93%	87%	89%	91%
	Don't Know	3%			2%
Total		100%	100%	100%	100%

d9b 1-8 - IF NO: Why didn't you apply for the rebate? Would you say it was mainly because ...'

	Area: St. John's (n=2) ▼	Area: Labrador (n=2) ▼	Area: Rest of Province (n=2) ▼	Total (n=6) ▼
Don't know what to do or how to go about it	100%		100%	95%
Wasn't aware of it		50%		3%
Just haven't gotten around to it		50%		3%

Note: More than one response allowed. ▼Percentages should be viewed with caution due to small sample sizes (N<30)

d11 - Which rebates did you apply for?

		Area			Total (n=57)
		St. John's (n=28) ▼	Labrador (n=13) ▼	Rest of Province (n=16) ▼	
D11.1 to 11.3	Programmable Thermostat	36%	38%	19%	28%
	High performance electronic thermostat	7%	15%		4%
	Energy Star windows	32%	38%	69%	49%
	Insulation (basement/crawl space)	29%	38%	31%	30%
	Attic insulation	25%	31%	44%	33%
Total		100%	100%	100%	100%

Note: More than one response allowed. ▼Percentages should be viewed with caution due to small sample sizes (N<30)

d12.1-8 - Where did you get your information about the rebate program? (READ LIST) ...

	Area			Total (n=600)
D12 Where did you get your information about the rebate program?	St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
D12.1 - Retailer/Building supply store	46%	54%	50%	48%
D12.7. Retail In-store signage (2013)	4%			2%
D12.2. Website	7%	23%	12%	10%
D12.3. Advertising	11%		19%	14%
D12.4. Word of mouth	14%	23%	31%	22%
D12.5. Bill insert	39%	8%		21%
D12.6. Brochure	4%		12%	7%
d12.8 Other	7%	8%	25%	15%

Note: More than one response allowed.

d13 - To what extent did you find your retailer helpful/knowledgeable about the rebate program? Would you say they were ....

	Area			Total (n=600)
D13. To what extent did you find your retailer helpful/knowledgeable about the rebate program? Would you say they were?	St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
Very helpful or knowledgeable	39%	62%	50%	45%
Somewhat helpful or knowledgeable	25%	15%	12%	19%
Didn't interact with any staff from retailer	29%	23%	37%	32%
Don't know or can't recall	7%			4%

PART Z – DEMOGRAPHICS

sm1. Do you have a Facebook account or twitter account that you use regularly?

		Area			Total (N=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
SM1. Do you have a facebook account or twitter account that you use regularly?	Facebook	37%	49%	34%	36%
	Twitter		1%	1%	0%
	Both	5%	7%	5%	5%
	Neither	57%	44%	61%	59%
Total		100%	100%	100%	100%

AGE CATEGORY

	Area			Total (N=600)
	St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
18 to 24	0%	1%		0%
25 to 34	9%	14%	4%	7%
35 to 49	24%	33%	25%	25%
50 to 64	33%	39%	35%	35%
65 or more	31%	15%	36%	33%
Refused	1%		1%	1%
Total	100%	100%	100%	100%

Average age

	Area			Total (n=579)
	St. John's (n=195)	Labrador (n=196)	Rest of Province (n=188)	
Minimum	20	23	27	20
Maximum	90	84	90	90
Mean	56	51	58	57
Median	56	50	58	57

Z2 - What is the highest level of schooling that you have obtained?

Z2. What is the highest level of schooling that you have obtained?	Area: St. John's (n=200)	Area: Labrador (n=200)	Area: Rest of Province (n=200)	Total (N=600)
Less than high school	12%	18%	36%	26%
Completed high school	18%	18%	20%	19%
Technical or vocational school	14%	15%	12%	13%
Some college or university	15%	12%	11%	12%
Completed college or university	30%	31%	20%	24%
Post graduate degree	9%	6%	3%	5%
Refused		1%		0%
Total	100%	100%	100%	100%

Average number of people in the household

		Area: St. John's (n=200)	Area: Labrador (n=200)	Area: Rest of Province (n=200)	Total (n=600)
Z3. How many people currently reside in your home including yourself?	Minimum	1	1	1	1
	Maximum	8	7	6	8
	Mean	3	3	2	2
	Median	2	2	2	2

Z4 - Are there any children aged 18 years or less living in your household?

		Area: St. John's (n=200)	Area: Labrador (n=200)	Area: Rest of Province (n=200)	Total (N=600)
Z4. Are there any children aged 18 years or less living in your household?	No	73%	68%	78%	76%
	Yes	27%	33%	22%	24%
Total		100%	100%	100%	100%

Z5 - Which of the following best describes your current marital status?

Z5. Which of the following best describes your current marital status?	Area: St. John's (n=200)	Area: Labrador (n=200)	Area: Rest of Province (n=200)	Total (N=600)
Single or never married	9%	10%	12%	11%
Married	71%	67%	63%	67%
Common law or living with a partner	4%	15%	5%	5%
Separated or Divorced	7%	3%	6%	6%
Widowed	7%	6%	13%	11%
Refused	0%		1%	0%
Total	100%	100%	100%	100%

Z6 - Which of the following broad income categories best describes your total household annual income?

		Area: St. John's (n=200)	Area: Labrador (n=200)	Area: Rest of Province (n=200)	Total (N=600)
Z6. Which of the following broad income categories best describes your total household annual income?	Under 20,000	5%	5%	11%	8%
	Under 30,000	12%	7%	14%	13%
	Under 40,000	14%	9%	14%	14%
	Under 50,000	8%	10%	16%	13%
	Under 60,000	10%	9%	7%	8%
	Under 70,000	6%	9%	5%	6%
	Under 80,000	9%	12%	7%	8%
	More than 80,000	30%	36%	21%	25%
	Refused	3%	5%	7%	5%
Total		100%	100%	100%	100%

Z7b - What type of dwelling do you live in?

Z7b. What type of dwelling do you live in?	Area: St. John's (n=200)	Area: Labrador (n=200)	Area: Rest of Province (n=200)	Total (N=600)
Single dwelling house	82%	83%	93%	89%
Semi detached house	2%	8%	1%	2%
Townhouse or Rowhouse	4%	3%	2%	3%
Apartment flat less than 5 units	5%	2%	3%	3%
Apartment flat 5 to 20 units	1%	1%	2%	1%
Apartment more than 20 units	2%	3%		1%
Mobile home or trailer	0%	2%		0%
Other	1%			1%
Total	100%	100%	100%	100%

Average age of home

		Area			Total (n=200)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
Z7c. Approximately how old is your home or dwelling?	Minimum	2	1	1	1
	Maximum	100	80	150	150
	Mean	32	32	38	35
	Median	30	35	36	35

Sex

		Area			Total (N=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
Sex	Male	40%	49%	44%	43%
	Female	59%	52%	55%	57%
Total		100%	100%	100%	100%

PANEL

		Area			Total (N=600)
		St. John's (n=200)	Labrador (n=200)	Rest of Province (n=200)	
Confidential Test Panel	Yes Joining panel	45%	34%	40%	42%
	Not interested in panel	54%	66%	60%	58%
Total		100%	100%	100%	100%

takeCHARGE! Commercial Customer Research
(October 2013)

NATIONAL

Trusted Partner. Bold Thinking.™

takeCHARGE Energy Rebate Program

Corporate Research Associates Inc.

October 2013

CRA

CORPORATE RESEARCH ASSOCIATES

CRA

Research Methodology

Study Type:	***Qualitative Research*** – Net*focus* Group and In-depth interviews
Study Region:	Newfoundland and Labrador
# Groups:	1 Net*focus* Group and 15 in-depth telephone interviews
Language of Groups:	English
Participants:	Small and medium-sized businesses. The research was conducted with either the business owner or the individual who is responsible for making the decisions regarding the organization's energy usage and the use of energy efficiency products.
Timeline:	Net*focus* Group conducted September 23rd, in-depth interviews conducted between September 23rd and October 9th, 2013.
Background:	National is working with takeCHARGE Energy Savers Rebate Program to develop an energy efficiency initiative aimed at small to medium-sized businesses. The purpose of this research is to gain a sense of the commercial market's attitudes related to energy efficiency investments and to gauge their appetite for energy efficiency offerings.
Research Objectives:	*- Gauge importance of reducing energy usage;* *- Assess current and previous energy efficiency actions undertaken;* *- Define the motivators and barriers to participation in programs/making investments in energy efficiency initiatives; and* *- Gauge current levels of interest in a proposed energy efficiency program.*

Executive Summary

Results of the ***takeCHARGE Qualitative Research*** reveal that small to medium size businesses are concerned about their energy consumption and this concern is primarily rooted in cost. Many small to medium size businesses have low profit margins and any action they can undertake to reduce expenses is seen as having a favourable impact on their bottom line.

Participants show extreme variation in terms of the actions they have undertaken to reduce their energy usage. On one hand, some participants have not engaged in energy efficiency activities due to lack of time and/or competing priorities. Similarly, others are leasing their premises and see such initiatives as the responsibly of their landlords. In contrast, others have undertaken major capital projects in an attempt to reduce their energy consumption. Reducing energy costs is the main driver behind these latter actions.

The payback period of energy efficiency initiatives is seen as being directly related to the investment cost. For example, capital projects and other major investments are seen as requiring multi-year paybacks in the range of five (5) to ten (10) years. In contrast, smaller projects, such as converting to T8 light bulbs, are seen as having an earlier return of three (3) to 12 months. For the most part, participants are interested in making long-term investments in energy efficiency that will result in larger cost savings. However, initial investments will have to be determined by the businesses' current financial status.

Newfoundland Power is clearly seen as a credible information source on energy efficiency, with most indicating they would or have already contacted Newfoundland Power regarding energy efficiency practices. Providing advice and guidance, informing businesses of potential offerings and rebates are all identified as roles to be fulfilled by Newfoundland Power.

Energy efficiency is complex and business owners/operators have specific questions regarding their unique circumstances. As such, participants show an affinity towards in-person methods of communication and education on energy efficiency. Having access to an individual who is knowledgeable in the field and can answer specific questions is seen as having real value. Similarly, having that expert conduct a site visit and make recommendations regarding specific initiatives that could be undertaken by the business and outlining the actual cost as well as the potential cost savings is an area of great importance, and is seen as a key element of any future energy efficiency offering.

Overall, there was strong interest in takeCHARGE's customized energy efficiency opportunities, with most participants indicating they would follow-up to learn more about the initiative and what it entails. The rebates, cost-savings and the inclusion of a site visit to develop a customized energy project have high appeal. However, it was unclear to some participants if there would be a fee associated with the site visit, while others would like more detail regarding their individual cost savings. Addressing these areas of concern will serve to strengthen the proposed offering.

Key Findings:

Reducing Energy Usage Behaviours and Incentives

CRA

Reducing Energy Usage

Reducing energy usage is important to participants.

At the start of the *Net*focus group and each interview, participants were asked to individually rate the importance of reducing their energy costs using a ten point scale where one (1) was ‘not at all important’ and ten (10) was ‘very important’.

For the most part, participants consider reducing their energy costs as an important aspect of their operations, with many providing a rating of seven or higher. Participants providing high ratings tend to report they consume a significant amount of energy and have high electrical costs. This is having a negative impact on their profit margins.

> *“Keeping utility bills down is very important to a small company.”*

> *“We have various locations and we are always looking for ways to save money.”*

- In a few instances, participants provide lower ratings (5 or lower). These participants report their electrical costs are not significant and any benefits derived from reducing their energy usage would be minimal. Similarly, others feel the costs associated with the technology and/or renovations they would have to undertake to make their premises more energy efficient would be in excess of the anticipated cost savings.

> *“Energy costs for our business are small and reducing our use will not amount to a significant savings.”*

> *“In the grand scheme of things it is not a huge cost and to do the renovations to this building to make it more energy efficient would outweigh the savings.”*

CRA

Actions to Reduce Energy Usage

While participants exhibit variation in the depth and breath of the energy efficiency initiatives undertaken, reducing energy <u>costs</u> is consistently identified as the motivating factor.

- Participants were asked to outline what, if anything, they have undertaken to reduce their energy usage. Participants show variation in terms of the actions they have undertaken, with a few participants indicating they have not actively engaged in any activities to reduce their energy use. These latter individuals either have low energy costs and do not see the value in undertaking measures to reduce their energy consumption or are leasing their premises and believe it is the responsibility of the landlord to undertake such actions.

- The table below summarizes individual actions that have been undertaken by participants by frequency:

Most frequently identified actions	Less frequently identified actions
– Gradual powering up of lighting systems – Turning off equipment after hours – Reducing heat during non-work hours – Installing demand control systems and timers – Lighting retrofits – Installing T8 lights and electronic ballasts – Replacing older equipment such as chillers and compressors – Replacing windows and exterior siding	– Installing ceiling fans in warehouses to enable better heating in the winter – Installing a heat exchange unit – Installing heating control systems – Lowering hot water temperature – Replacing exit signs with LED lights – Installing variable speed devices – Implementing a daytime cleaning program – Replacing doors to reduce heat lost – Replacing weather stripping – Converting from oil to electricity – Installing programmable thermostats – Installing low-flow shower heads

- Overall, participants have engaged in the above activities to reduce their energy costs, and most report these steps have had the desired effect of lowering energy costs.

- Similarly, those who have not taken the steps to reduce their energy consumption cite potential cost savings as the greatest motivator to entice them to engage in energy reduction measures.

CRA

Investment Considerations

The acceptable payback associated with energy efficient initiatives is dependent on the amount of the initial investment.

Participants were asked if they were to install energy efficient equipment, such as energy efficient appliances or lighting, what would they consider to be a reasonable payback period.

- Participants found it challenging to provide a definitive answer to this question with many noting the payback period would be dependent on the size of the investment. For example, large capital projects, such as replacing machinery and equipment or retro fixing a building, are seen as long-term investments with the acceptable payback ranging anywhere from seven to 10 years. In contrast, less intensive projects, such as converting to T8 lights, are associated with a quicker payback period with three to 12 months seen as being appropriate.

"I guess that would depend on your initial outlay."

"It dependents on the cost outlay. If it is a big cost outlay you would expect it to be a multi-year payback, but if it is a relatively inexpensive outlay then you would expect a shorter payback."

- Participants are generally interested in making a substantial investment that will have a longer term yield in reducing their energy costs. Participants also suggest that companies with smaller profit margins will need to engage in energy efficiency initiatives that are fiscally within their reach. Alternatively, participants who report being concerned with their energy costs are more apt to express an interest in a mix of both long and short term commitments.

" Your investment should be proportional to your income. As you grow you would increase your investment."

"I prefer the larger investments because a penny saved is a penny earned. You have to spend money to make money."

"Knock off the low hanging fruit first and than make a plan for the long-term ."

Key Findings: Information Sources and Communication Methods

CRA

Information Sources

Although most participants have not actively sought out information on energy efficiency, their service provider is seen as a reputable source.

- For the most part, participants have not actively sought out information on how to reduce their energy usage. Lack of time and competing priorities are cited for not seeking out this information. It also merits mention that a few participants acknowledge that Newfoundland Power oftentimes will include bill inserts that outline tips to reduce energy usage. However, participants are not taking the time to review the information provided.

  "We are extremely busy and energy use gets pushed to the back burner. If the cost goes up then it becomes a priority."

  "I know that the power company has programs, but I haven't taken it to that level because of other demands."

  "I glance at the inserts, but I can't say I am very active on them."

- Despite the above finding, a few participants have actively sought out information on energy efficiency. Some have consulted with colleagues to see what actions they have undertaken and learn about the outcome. While others have consulted with Newfoundland Power, commissioned external consultants to undertake feasibility studies during the construction of new buildings and/or complete energy audits of existing buildings.

- Participants were asked to identify who they would approach if they were interested in learning more about how to reduce their energy usage. As might be expected, their service provider, either Newfoundland Power or Newfoundland and Labrador(NL) Hydro, are consistently identified as potential sources. Participants believe their service provider should be well-versed in energy efficiency products and initiatives that are currently available in the marketplace.

  "I would go to NL Hydro because that is where I get my power. I would be looking for ways to lessen my usage and conserve power."

  "I would call Newfoundland Power first."

  " I wouldn't know who to call. I would call Newfoundland Power first and hopefully they could point me in the right direction."

CRA

Information Sources (cont.)

- It merits mention that participants are more inclined to contact Newfoundland Power as opposed to NL Hydro to obtain information on energy efficiency measures. Newfoundland Power is perceived as being the body that would have the knowledge and information participants would be seeking.

- In addition to their service provider, participants also identify other potential information sources. The table below provides a listing of these additional information sources and what participants hope to gain from their interaction:

Information Source	Hope to learn
Internet/Google searches	General tips on how to conserve energy and reduce costs
Government departments	To determine if there are any programs and/or rebates available
Installation contractors/suppliers	To determine which equipment/machinery is most energy efficient To look at the specification sheets
Building Owners and Managers Association (BOMA)	The requirements and process for certification as a "BOMA Best" building
Landlord	To see if there are any actions that they would be willing to undertake to improve the premises energy efficiency

- It is also important to note that a few participants are uncertain as to who they would approach if they were looking for energy efficiency information, which offers an opportunity to takeCHARGE.

- Similarly, some participants are unable to articulate the most important piece of information or assistance they require in terms of reducing their energy consumption. However, among those that are able to provide a definite response, having someone outline the steps required to reduce their energy usage and/or participating in an energy audit are seen as having tremendous value. Likewise, participants would like to know if the measures they are implementing to reduce their energy consumption are actually having the desired effect.

  "If someone could call and come and visit and tell you how you could reduce your cost."

  "Having access to a person who will come in and say what would be more beneficial."

  "The energy audit is the biggest piece of the puzzle."

Communication Methods

Participants show an affinity towards communication mediums that have a high degree of personal interaction.

- Participants were given a list of ten possible means to inform businesses on how to use energy more efficiently. The list of the ten possible communication methods is presented below in order of participant preference, with the top two methods being highlighted:

    1. **In-person meetings**
    2. **In-person seminars/workshops**
    3. Print material, such as brochures and pamphlets
    4. Information on a website
    5. Trade shows
    6. Advertising
    7. Webinars
    8. Email
    9. Social media (Facebook & Twitter)
    10. Telephone discussions

- Of the ten options presented, participants were asked to choose the three (3) methods that they felt would be most effective.

- While there is variation in responses, methods that entail direct person-to-person contact are seen as having greater value. Personal interaction is seen as not only allowing for the sharing of information, but also enabling participants to ask questions and seek clarification of specific points. While this method maybe more time intensive, it is seen as being very effective by participants.

    "I just think that given the nature of the interaction, in-person is the way to go. It is much better. It would be more valuable to get the feedback on what you were asking."

    "In-person is always good with some documentation to prove it."

    "The results of the in-person could be tailored to that person rather than a generic solution."

CRA

Communication Methods (cont.)

- The table below provides a summary of the feedback identified with the remaining information sources assessed:

Communication Method	Summary of Feedback
Print Material (brochures & pamphlets)	– Overall pint material was not seen as the most effective means of engagement. – Participants readily acknowledge they do not take the time to read bill inserts or that their bills are processed by their accounting personal and they are not the ones who are responsible for making decisions regarding energy efficiency. – Some participants did suggest that print material could be effective if used in conjunction with other communication modalities. For example, leaving behind brochures and pamphlets at the end of an in-person meeting and/or seminar is seen as potentially having value and could reinforce the points discussed.
Information on a Website	– Divergent views among participants. – Those who like this communication method show a preference for seeking out information on their own time. They like the fact they can take their time and absorb the information at their own pace. – Those who are not in favour of this method report they are unlikely to visit a website and seek out information. They prefer a more interactive style of information sharing.
Trade Shows	– While few participants identified trade shows as an effective communication tool, those who did believe trade shows would allow for personal interaction and two-way dialogue about energy efficiency measures. – Those in less support of this method of information sharing believe trade shows are oftentimes quite large and such a topic may become lost in such a large venue.
Advertising	– Some participants suggest that advertising, such as print and radio advertisements, are not effective in sharing information about energy efficiency. – If considering TV, participants feel the advertisements need to be strategically placed during the news broadcast. – The only role advertising is seen as playing is making people aware of a product or initiative. This type of advertising is not readily seen as resulting in a specific call to action. – Many report they do not pay attention to advertisements.
Webinars	– Very few participants saw this as an effective communication vehicle. – However, it was noted that it could be effective if used in partnership with business associations and groups (see the “other” section at the bottom of the table).
Email	– Businesses owners/operators receive numerous emails on a daily basis. This information may be easily missed or deleted before it is even opened. Such emails may also go to junk mail. – Overall, email is not seen as an effective medium.
Social Media (Facebook & Twitter)	– Most participants see social media as a tool for personal use and not business use. – Information obtained through social media is seen as having less credibility by some participants. – Overall, social media is not perceived as an effective medium.
Telephone Discussions	– Not seen as an effective means of communication. – The initial call could easily be mistaken as a telemarketer. – It is challenging to get the right person over the phone due to busy schedules.
Other	– Participants were given an opportunity to suggest alternative means to inform businesses on how to use energy more efficiently. – Reaching the business community through various associations such as board of trades, chambers of commerce and organizations such as BOMA are seen as having real value.

CRA

Potential Offering Interest

Participants express interest in learning more and participating in energy efficiency activities presented.

- Participants were provided with five (5) potential energy efficiency offerings or incentives and asked to indicate their level of interest. Overall, participants express interest in participating and/or learning more about each of the five activities presented.
- The top three activities generating the greatest interest are:
  1. *On-site review of your existing equipment to assess potential areas where you can reduce your company's energy usage*
  2. *Participating in a rebate program designed to promote the use of energy efficient lighting among NL businesses*
  3. *Receiving valuable guidance and rebates when your business buys and installs energy efficient electrical products such as HVAC, refrigeration, and so forth*
- The table below summarizes the feedback received for each of the activities presented:

Activity	Summary of Feedback
On-site review of your existing equipment to assess potential areas where you can reduce your company's energy usage	- Had a great amount of appeal among participants. - Participants like that this approach is tailored to address their own unique needs. - Like to get suggestions on what appliances/equipment that should be purchased.
Participating in a rebate program designed to promote the use of energy efficient lighting among NL businesses	- Participants like that this activity will result in a cost savings. - Some participants would like more information regarding exactly how much money they will save.
Receiving valuable guidance and rebates when your business buys and installs energy efficient electrical products such as HVAC, refrigeration, and so forth	- Rebates are effective incentives and generated a lot of interest among participants. - Participants like the fact that they are receiving financial remuneration for their efforts. - The success of this program will be dependant on how it is distributed. If the rebates are provide via mail, they may get thrown out inadvertently.
Attending a free workshop about how to reduce your company's use of electricity	- Effective way to share and learn new information. - Participants like the interactive nature of workshops. - Some participants, who run small businesses and are extremely busy and question whether they would be able to take the time away from their business to attend.
Visiting a website set up to show helpful hints about how businesses can save on electricity	- Challenge will be that business owners/operators will need something that will drive them to the website. Some feel this activity may be of lesser value than the others presented. - A few participants are not well-versed in computers and would not be likely to visit such a website.

CRA

Key Findings: Key Elements of an Energy Efficiency Program

CRA

Energy Efficiency Offering: Elements

Providing tailor-made solutions, off-setting the associated costs and clearly demonstrating the cost savings to be realized are key components of an energy efficiency offering.

- Participants were asked to identify the key elements of an energy efficiency offering. Consistently identified features include:
  - **Energy efficient lighting.** Many participants report a significant portion of their energy costs are driven by their lighting. Finding ways to reduce lighting costs is seen as being of interest to these participants and thus an important aspect to include in an energy efficiency offering.

    "For me it would have to be energy efficient lighting because that is a big part of what I use in my business."

    "Lighting retro fits and rebates would be important to include."
  - **Helpful tips.** Participants suggest that any future energy efficiency offering contain helpful hints and tips on how to reduce energy usage that can be shared with staff.

    "I would like to have a cheat sheet, tips, that I could pass along to my staff."
  - **Rebates.** Receiving cash back and/or rebates when purchasing energy efficient equipment and/or products is also considered to be an effective means to entice business owners to take part in energy efficiency offerings. Obtaining rebates while at the same time reducing overall energy cost is seen as having wide appeal to a broad range of businesses.

    "Rebate programs would be nice to help companies with these expenses. There is an expense involved with all this stuff."

Energy Efficiency Offering: Elements

- **Access to experts.** Participants readily acknowledge they have little to no knowledge in how to lower their energy consumption and many do not know where to start. Having access to a professional who has the knowledge and expertise to tailor an energy efficiency program to meet their goals and objectives is considered to be a key attribute of an effective energy efficiency offering.

  "Access to consultants and experts so they know where we are loosing money. Knowledge is half the battle."

- **Cost benefit analysis.** As previously mentioned, reducing energy costs is the primary motivator for engaging in energy efficiency activities. Consequently, participants readily agree that prior to undertaking or enrolling in an energy efficiency program they want to clearly see what cost savings will be achieved.

  "Is it worth your while getting involved in an energy efficiency program in the first place if it is not going to result in some savings for your operation?"

Key Findings: Potential Offerings

CRA

Energy Efficiency Offering

There is strong interest in takeCHARGE's proposed customized energy efficiency opportunities.

- Participants were informed that takeCHARGE is in the process of developing customized energy efficiency opportunities for its commercial customers. The following text was shared with all participants and their initial impressions obtained:

  Interested in how to make your business more energy efficient, take advantage of rebates and save money over the long term? Call our business efficiency experts at takeCHARGE! They will visit your premises and provide advice on how to implement your own customized energy efficiency project. takeCHARGE will pay $0.10/kWh of your first year energy savings up to a maximum of $50,000. Call and see how takeCHARGE can help you pay for those energy efficiency improvements!

- Overall participants are interested in learning more about customized energy efficiency opportunities. As might be expected, participants who are leasing their premises are less likely to be interested in learning more about this initiative as the decision to participate in such a program would be at their landlords' discretion. Similarly, those with low energy costs did not see a benefit in their participation.

  "It sounds enticing to me."

  "Oh yeah, I would definitely call if something like this came across my desk."

  "For someone to just do something and send it out and that it should be applicable to everyone, it is not going to work that way. It would have to be done per location and see what would actually work. So I would like that idea."

- Specific aspects of the offering that are of appeal to participants include the:
  - Rebates
  - Site visit
  - Long-term cost savings
  - $0.10/kWh over the first year, up to a maximum savings of $50,000

CRA Energy Efficiency Offering (cont.)

- While most participants found this offering to be straightforward and clear, a few participants would like to have clarification regarding if there is any cost associated with the site visit. Similarly, another participant found the sentence, *"takeCHARGE will pay $0.10/kWh of your first year energy savings up to a maximum of $50,000"*, unclear and somewhat confusing. Similarly, others are uncertain as to their annual kilowatt usage, so they were unable to readily calculate their potential cost savings. Tailoring promotional pieces to include this information is seen as having value. No other issues were identified with the description provided.

  "I don't know if this is worth $50 or $500 or whatever because I don't k now what my kilowatt usage is."

- In addition, a few participants found the last sentence of the description provided, *"Call and see how takeCHARGE can help you pay for those energy efficiency improvement!"* as sending a mixed message. Alternatively, participants in the *Net*focus group recommend the sentence be revised to read as follows:

  " Call and see how we can identify your potential savings and how we can help you pay for these."

- No additional feedback was provided.

Take Charge Energy - Draft

General Instructions:

o Interviewer must read each set of instructions for each part of this questionnaire.
o Interviewer must record all responses clearly and verbatim where required.
o Interviewer must avoid paraphrasing or rewording responses.

Hello, this is __________ on behalf of Corporate Research Associates, a professional research company. I'm calling to conduct an important survey about energy use in your business, and related energy issues. May I please speak with **an owner or with the individual who makes the decisions with respect to your organization's energy usage and the use of energy efficiency products and programs**? Probe if necessary: someone who makes decisions regarding the company's spending, sees / pays electricity bills and is involved or solely responsible for making decisions regarding the company's energy use and the use of energy efficiency products.

1	Speaking	**CONTINUE**
2	Yes, and transfer	**REPEAT INTRODUCTION & CONTINUE**
3	No, not here now	**RECORD NAME & ARRANGE CALLBACK TIME**
4	No	**THANK, TERMINATE, & RECORD**
5	No office in Newfoundland or Labrador	**THANK, TERMINATE, & RECORD**

We are not trying to sell you anything, and your participation is voluntary. All your answers will remain anonymous. **IF ASKED, SAY:** The survey should take 10-15 minutes to complete.

ARRANGE CALLBACK IF NECESSARY. IF ANY QUESTIONS OR CONCERNS, PLEASE COLLECT NAME AND NUMBER AND SAY A REPRESENTATIVE FROM CRA WILL CONTACT THE RESPONDENT. PASS THIS INFORMATION ALONG TO JEAN COOK AT CRA AS SOON AS POSSIBLE.

RE-SCHEDULE INTERVIEW FOR ANOTHER TIME IF NECESSARY. IF RESPONDENT INDICATES ANOTHER INDIVIDUAL IS MORE APPROPRIATE FOR INTERVIEW, CONTACT NEW PERSON AND START AGAIN.

Section A. Introduction

1. Gender: (by observation)

   1 Male
   2 Female

2. What is your position within your company?
   READ CATEGORIES ONLY IF NECESSARY - CODE ONE ONLY - ASK TO TRANSFER IF NOT ONE OF 01-05 POSITIONS BELOW

   01 CEO/Chief Executive Officer
   02 Owner/Partner
   03 President
   04 Senior Management/Manager/Director
   05 Vice-President

98 Don't know/No answer
99 Other **(SPECIFY:________________________)**

3. Do you currently own, lease or rent your business premises in Newfoundland and Labrador? **DO NOT READ RESPONSES – CODE ONE ONLY – IF RESPONDENT SAYS COMPANY HAS MORE THAN ONE PREMISE, ASK THAT S/HE TAKE ALL LOCATIONS INTO ACCOUNT**

1 Own
2 Lease
3 Rent
4 Own and lease
5 Own and rent
6 Lease and rent
8 Don't know/No answer

IF 'LEASE' OR 'RENT' OR 'LEASE AND RENT' IN Q3 – ASK FOR THE NAME OF THE PROPERTY MANAGER/LANDLORD AND THEIR CONTACT INFORMATION – THANK AND TERMINIATE – FOLLOW UP WITH THE INDIVIDUAL IDENTIFIED

Section B: Business Profile

4. Can you tell me in what line of business or industry your company is primarily engaged within Newfoundland and Labrador? **PROBE:** Any others?
DO NOT READ SECTORS - CODE AS MANY AS APPLY - CODE FIRST/SUBSEQUENT MENTIONS SEPARATELY

01 Agriculture
02 Accommodations
03 Communications
04 Small/Medium Commercial **(PROBE FOR SPECIFICS IN TERMS OF TYPE OF PRODUCT OR SERVICE: ________________________)**
05 Culture/Entertainment
06 Computers/Information Technology
07 Construction
08 Fisheries
09 Manufacturing
10 Medical
11 Services (**PROBE FOR SPECIFICS IN TERMS OF TYPE OF SERVICE BUSINESS IS ENGAGED IN: ____________________)**
12 Tourism
13 Transportation
14 Food processing
15 Wholesale/warehouse
16 Retail
17 Energy
18 Engineering
19 Oil/gas **(PROBE FOR SPECIFICS IN TERMS OF TYPE OF SERVICE PROVIDED IN THE OIL AND GAS SECTOR ________________) THANK AND TERMINATE IF LARGE OIL**

	AND GAS COMPANY	
20	Forestry/Pulp and Paper	**THANK, TERMINATE, AND RECORD**
21	Mining	**THANK, TERMINATE, AND RECORD**
22	Government	**THANK, TERMINATE, AND RECORD**
23	Not for profit/Religious institutions	**THANK, TERMINATE, AND RECORD**
24	Hospital	**THANK, TERMINATE, AND RECORD**
25	University/Community college/Public school	**THANK, TERMINATE, AND RECORD**
26	Military	**THANK, TERMINATE, AND RECORD**
98	Don't know/No answer	
99	Other **(SPECIFY:________________________)**	

5. *Moving along ...* How many business locations does your organization currently have in Newfoundland and Labrador? By 'business locations,' we are referring to any and all separate offices or any other site where your organization conducts business in the province.
RECORD EXACT NUMBER - PROBE TO AVOID ACCEPTING A RANGE

RECORD NUMBER OF LOCATIONS: _______________
997 None/Zero **THANK, TERMINATE, AND RECORD**
998 Don't know/No answer

6. Does your business pay for its own electricity locally or is it paid by head office or some other department?
CODE ONE ONLY – PROBE FOR APPLICABLE RESPONSE

1 Paid locally
2 Head office or other department pays
8 Don't know/No answer

Section C: Context

7. *Moving along* ... I would now like to ask you a general business question. In your opinion, what is the single most important issue currently facing your organization within Newfoundland and Labrador? **PROBE:** Anything else?
DO NOT READ RESPONSES - CODE AS MANY AS APPLY - RECORD FIRST/SUBSEQUENT MENTIONS SEPARATELY

01 High electricity rates
02 High energy prices
03 Productivity concerns
04 High Canadian dollar
05 Lack of consumer demand/Downturn in the US economy
06 Keeping up with competition/Foreign companies or new technologies entering the market
07 Changes in the regulatory environment
08 Tax environment
09 Finding and retaining qualified staff
10 Succession planning

97 None/Nothing
98 Don’t know/Refused
99 Other **(SPECIFY:________________________)**

8. Thinking specifically about reducing your organization’s energy usage in Newfoundland and Labrador, what is the greatest challenge facing your organization? **PROBE:** Anything else?
DO NOT READ RESPONSES - CODE AS MANY AS APPLY - RECORD FIRST/SUBSEQUENT MENTIONS SEPARATELY

01 Accessing the right information
02 Accessing the required support personnel to make the necessary changes
03 Cost required to make the necessary changes
04 Finding the time internally to address energy usage concerns
05 Obtaining the support/buy-in required internally to make the necessary changes
97 None/Nothing
98 Don’t know/Refused
99 Other **(SPECIFY:________________________)**

Section D: Business Energy Specifications

I would now like to ask about your businesses energy usage.

9. What is the ***main*** source of energy used to heat your primary business premise in Newfoundland and Labrador? Is it ... :
READ RESPONSES IN ORDER - CODE AS MANY AS APPLY

01 Electricity
02 Propane
03 Oil, or
04 Wood
99 Do you use some other energy source? **(SPECIFY: ______________)**
VOLUNTEERED
98 Don’t know/No answer

Section E: Electricity Expenditures

10. The next question is about your company’s electricity expenditures in Newfoundland and Labrador. To the best of your knowledge, approximately what is the average monthly cost of your electricity bill? **RECORD AMOUNT – PROBE TO AVOID ACCEPTING A RANGE**

RECORD AMOUNT: $ ___________
998 Don’t know/No answer

11. How are decisions made about energy usage in your Newfoundland and Labrador operations? **DO**

NOT READ RESPONSES – CODE ALL THAT APPLY

01 Company/corporation has standard policies and procedures that must be followed
02 Company/corporation has building specifications that must be followed
02 At the executive level
03 By the owner/owners
98 Don't know/Refused
99 Other **(SPECIFY:________________________)**

12. What is your company's budget cycle? **DO NOT READ RESPONSES – CODE ONLY ONE**

1 March 31st
2 Calendar year
9 Other (**SPECIFY:** ________________________)
8 Don't know/No answer

Section F: Efficiency and Environmental Issues

13. Over the past 12 months, has your business taken steps to reduce the amount of electricity it uses? **CODE ONE ONLY**

1 Yes
2 No
8 Don't know/No answer

14. **[POSE Q.14 ONLY IF 'NO' IN Q.13]** Prior to the past 12 months, had your business taken steps to reduce the amount of electricity it uses? **CODE ONE ONLY**

1 Yes
2 No
8 Don't know/No answer

15. **[POSE Q.15 ONLY IF 'YES' IN Q.13 OR IF 'YES' IN Q14]** What specifically has your business done to reduce the amount of electricity it uses? **PROBE:** Anything else? **DO NOT READ RESPONSES - CODE AS MANY AS APPLY**

01 Changed to high performance/super T8s lights
02 Changed to LED lights
03 Changed to CFL bulbs
04 Turn on/use fewer lights
05 Turn off lights after hours
06 Use lower watt bulbs
07 Replaced/upgraded lighting with more energy efficient lighting
08 Adjusted the temperature when the office is closed
09 Turn off computers when not using them
10 Installed timers or motion detectors for lighting

11 Insulated buildings
12 Replaced/upgraded equipment or systems
13 Installed (a) programmable thermostat(s) or controls
14 Changed to high performance T5 high bay lighting
98 Don't know/No answer
99 Other **(SPECIFY: ____________________________)**

16. In the past year, would you say the total amount of electricity that is used by your business has ...: **READ RESPONSES IN ORDER - CODE ONE ONLY**

1 Increased
2 Remained the same, or
3 Decreased
VOLUNTEERED
8 Don't know/No answer

17. If your business was to install energy efficiency equipment, what would you consider to be a reasonable payback period? **RECORD NUMBER OF MONTHS – PROBE TO AVOID ACCEPTING A RANGE**

RECORD NUMBER OF MONTHS: ___________
998 Don't know/No answer

18. Using a scale from '1' to '10,' where '1' is 'not at all important' and '10' is 'critically important,' ... : **READ AND ROTATE STATEMENTS – CODE ONE ONLY PER STATEMENT – PROBE TO AVOID ACCEPTING A RANGE**

a. How important are efforts to educate businesses on using energy more efficiently?
b. How important are energy-saving considerations in the strategic decisions made by your company?
c. How important is it for your company to reduce its energy use?

01 Not at all important
02
03
04
05
06
07
08
09
10 Critically important
98 Don't know/No answer

19. What would be the <u>most effective</u> way to inform businesses of programs and services designed to help them use energy more efficiently? **DO NOT READ - CODE ONLY ONE RESPONSE**

01 In-person meetings
02 In-person seminars/workshops
03 Print materials, such as brochures and pamphlets
04 Telephone discussions
05 Information on a website
06 Webinars
07 Social media (Facebook and Twitter)
08 Email
09 Tradeshows
10 Advertising (**PROBE FOR SPECIFICS: ____________________________)**

VOLUNTEERED

98 Don't know/Refused
99 Other **(SPECIFY:_________________________)**

20. Using a scale form '1' to '10' where '1' is 'not at all effective' and '10' is 'very effective', how effective are each of the following methods in informing businesses on how to use energy more efficiently? **READ AND ROTATE STATEMENT – REMOVE RESPONSE PROVIDED IN Q19– CODE ONLY ONE PER STATEMENT – PROBE TO AVOID ACCEPTING A RANGE**

a. In-person meetings
b. In-person seminars/workshops
c. Print materials, such as brochures and pamphlets
d. Telephone discussions
e. Information on a website
f. Webinars
g. Social media (Facebook and Twitter)
h. Email
i. Trade shows
j. Advertising

01 Not at all effective
02
03
04
05
06
07
08
09
10 Very effective
98 Don't know/No answer

21. Who should be responsible for providing businesses with information on energy efficiency? **DO NOT READ RESPONSES - CODE AS MANY AS APPLY - RECORD FIRST/SUBSEQUENT MENTIONS SEPARATELY**

01 Federal government

02 Provincial government
03 NL Power
04 Businesses selling energy efficiency products
05 Chamber of commerce/Board of Trade
VOLUNTEERED
98 Don't know/Refused
99 Other **(SPECIFY:________________________)**

22. And who should be responsible for offering incentives and rebates to help businesses improve their energy efficiency? **DO NOT READ RESPONSES - CODE AS MANY AS APPLY - RECORD FIRST/SUBSEQUENT MENTIONS SEPARATELY**

01 Federal government
02 Provincial government
03 NL Power
04 Businesses selling energy efficiency products
VOLUNTEERED
98 Don't know/Refused
99 Other **(SPECIFY:________________________)**

23. To the best of your knowledge, has your business ever participated in an energy efficient program offered by an external organization?
DO NOT READ – CODE ONLY ONE

1 Yes
2 No
8 Don't know/No answer

24. **[POSE Q.24 ONLY IF 'YES' IN Q.23]** What was the name of the energy efficiency program? **DO NOT READ RESPONSES - CODE AS MANY AS APPLY**

01 takeCHARGE Energy Savers Rebate Program
02 Government rebate program **(PROBE FOR SPECIFICS**: ____________________**)**
03 Other **(RECORD SPECIFICS**: ____________________**)**
04 Cannot recall the name

25. And on a scale from '1' to '10,' with 1 being 'not at all interested ' and '10' extremely interested,' how interested are you in learning more about how your business can use less energy?
RECORD NUMBER – CODE ONE ONLY – PROBE TO AVOID ACCEPTING A RANGE

01 Not at all interested
02
03
04
05
06
07
08

09
10 Extremely interested
98 Don't know/No answer

26. What, if anything, would prompt your business to participate in programs and/or initiatives designed to assist your business use less energy? **DO NOT READ RESPONSES - CODE AS MANY AS APPLY - RECORD FIRST/SUBSEQUENT MENTIONS SEPARATELY**

01 Reductions in energy/utility costs
02 Rebates/subsidies to offset the cost of the necessary equipment
03 Testimonials and case studies from similar businesses
04 Public recognition for participating in the program/initiative
05 *Proven environmental impact, such as greenhouse gas emissions*
06 Desire to be a responsible corporate citizen
07 Nothing, would not participate
98 Don't know/No answer
99 Other **(SPECIFY: ____________________________)**

27. And which of the following would prompt your business to participate in programs and/or initiatives designed to assist your business use less energy? **READ AND ROTATE STATEMENT – REMOVE RESPONSES PROVIDED IN Q26– CODE ONLY ONE PER STATEMENT**

a. Reductions in energy/utility costs
b. Rebates/subsidies to offset the cost of the necessary equipment
c. Testimonials and case studies from similar businesses
d. Public recognition for participating in the program/initiative
e. Proven environmental impact, such as greenhouse gas emissions
f. Desire to be a responsible corporate citizen

01 Yes
02 No
VOLUNTEERED
98 Don't know/No answer

28. *Moving along* ... To the best of your knowledge, what, if any, energy efficiency programs, services, or organizations are available to assist Newfoundland and Labrador businesses in energy conservation? **PROBE:** Any others? **DO NOT READ RESPONSES - CODE AS MANY AS APPLY**

01 takeCHARGE Energy Savers Rebate Program
97 None/No energy efficiency programs
98 Don't know/No answer
99 Other **(SPECIFY: ____________________)**

29. **[DO NOT POSE Q.29 IF 'TAKECHARGE ENERGY SAVERS REBATE PROGRAM' IN Q.28]** Have you heard of the takeCharge Energy Savers Rebate Program? **CODE ONE ONLY**

1 Yes
2 No
8 Don't know/No answer

30. **[POSE Q.30 IF 'TAKECHARGE ENERGY SAVERS REBATE PROGRAM' IN Q.28 OR 'YES' IN Q.29]** What do you know about the takeCHARGE Energy Savers Rebate Program? **DO NOT READ RESPONSES - CODE AS MANY AS APPLY - RECORD FIRST/SUBSEQUENT MENTIONS SEPARATELY**

01 It is a program offered by Newfoundland Power
02 It is a joint program offered by Newfoundland Power and NL Hydro
03 It is a program offered by NL Hydro
04 It is for residential customers only
05 It is for residential and business customers
06 It provides tips on how to reduce energy usage
07 It is designed to help reduce energy costs
98 Don't know/No answer
99 Other **(RECORD SPECIFICS: ____________________)**

31. Which of the following activities would be of interest to your business?
READ AND ROTATE STATEMENTS - CODE ONE ONLY PER STATEMENT

a. *Attending a free workshop about how to reduce your company's use of electricity*
b. *Participating in a rebate program designed to promote the use of energy efficient lighting among Newfoundland and Labrador businesses*
c. *Visiting a website set up to show helpful hints about how businesses can save on electricity*
d. *Receiving valuable guidance and rebates when your business buys and installs energy efficient electrical products such as HVAC, refrigeration, and so forth*
e. *On-site review of your existing equipment to assess potential areas where you can reduce your company's energy usage*

01 Yes
02 No
98 Don't know/No answer

32. I am now going to read a series of statements about electricity. Using a scale from '1' to '10,' where '1' is 'completely disagree' and '10' is 'completely agree,' to what extent do you agree or disagree with the following statements? **READ AND ROTATE STATEMENTS - CODE ONE ONLY PER STATEMENT – PROBE TO AVOID ACCEPTING A RANGE**

a. *Our business already is doing all it can to reduce its use of electricity*
b. *Every time our business receives a power bill, we check to see if our electricity consumption is up or down*

c. *Reducing electricity consumption serves to reduce greenhouse gas emissions and therefore helps the environment*
d. *It takes too much effort to reduce electricity use*
e. *I don't know enough about ways to reduce my company's use of electricity*
f. *We are always looking for new and different ways to save electricity*
g. *Our business turns down the heat when our offices are closed*
h. *Our business turns off the lights and computers when our offices are closed*
i. *Newfoundland and Labrador businesses need to do more to reduce the amount of electricity they use*
j. *Reducing electricity ends up costing our company money*

01 Completely disagree
02
03
04
05
06
07
08
09
10 Completely agree
97 Not applicable
98 Don't know/No answer

Section G: Demographics and Classification Questions

And now a couple of questions to help us analyze the data.

33. How many years has your business been in operation?
READ RESPONSES IF NECESSARY - CODE ONE ONLY

1 Less than one year
2 Between 1 and 2 years
3 Between 3 and 5 years
4 Between 6 and 10 years
5 More than 10 years
VOLUNTEERED
8 Don't know/Refused

And finally, one last question ...

34. And what is the postal code of the office or location at which we have reached you today?
RECORD, EVEN IF THE RESPONDENT CAN ONLY GIVE PARTIAL POSTAL CODE

B ___ ___ ___ ___ ___
98 Don't know/No answer

35. Thank you for your assistance. In addition to this telephone survey, we will also be conducting a series of online focus groups with business people like yourself. The topic of the focus group will be energy usage and energy saving rebate programs. Are you interested in participating in such a discussion?
CODE ONE ONLY

1 Yes, am interested in participating in an on-line focus group **[CONFIRM & RECORD NAME AND PHONE NUMBER: ____________________]**
2 No, am not interested in participating in an on-line focus group

36. Finally, would your business be interested in participating in an end use survey this Fall that would involved a free on-site visit to identify energy efficiency opportunities?
CODE ONE ONLY

1 Yes, am interested in participating in an end use survey **[CONFIRM & RECORD NAME AND PHONE NUMBER: ____________________]**
2 No, am not interested in participating in an end use survey

This completes the survey. Thank you for your assistance and cooperation.

takeCHARGE
Moderator's Guide – FINAL
September 2013

Introduction & Warm-up	**10 minutes**

- Introduce self and function of a moderator.
- Explain today's topic: Today we will be discussing energy use in your business and energy related issues. The purpose of our discussion is to learn more about your views on energy efficiency, what you would expect to see in an energy efficiency program and determine the appetite for such an offering.
- Discussions will last approximately 1.5
- Explain role/process of focus groups: round table discussion, not a Q&A period; all opinions are important; look for a variety of opinions; important to understand how you agree/disagree; looking for your frank and honest opinions; speak one at a time.
- Explain that the client will be listening to the group, but will not be actively participating.
- Explain confidentiality, not reporting names.
- Participant introduction:
  - First name, type of business that you run and your main source of energy for heating in your office/facility. Then, **please send me a <u>chat message</u>**, telling me what is the greatest challenge facing your business. This is just to get you used to using the chat message function.

Reducing Energy Usage Behaviors & Incentives	**25 minutes**

Before we begin our discussion, I would like for you to **send me another <u>chat message</u>** and tell me two things:

1. How important is reducing your company's energy usage? Please use a scale from 1 to 10 where 1 is not at all important and 10 is very important.
2. Why you gave the score did?

Moderator to show questions on screen as reference

I'll give you a few moments.

We will come back to your scores shortly.

- What, if anything, has your company done or is doing to reduce the amount of electricity it uses?

Moderator to record on whiteboard

IF HAS TAKEN STEPS ASK:

⇒ What prompted you to do that?
⇒ What was the result/outcome?

IF HAS NOT TAKEN STEPS ASK:

⇒ Why have you not tried to reduce you electricity usage?
⇒ What, if anything, would entice your business to participate in programs and/or initiatives designed to assist you use less energy?
  - Why would that be an incentive?

Referring back to your earlier scores regarding energy usage…

Moderator to share with group the range in scores and ask…

- Why did you give the score that you did?

- If your company was to install energy efficiency equipment such as energy efficient appliances or lighting, what would you consider to be a reasonable payback period?
- Why did you choose that timeframe?
- How much would you be willing to invest up front?
- Would you rather make a small investment that had a small return, or invest in something larger that would end up saving your company more? Why?

Information Sources & Communication Methods	**25 minutes**

Next I would like to get your input in terms of how to best communicate and educate businesses regarding reducing their energy usage.

- Have you consulted anyone outside of your company already on energy reduction? If so, who?
- If you were looking for information on how to reduce your company's energy usage, where would you go?
- Why would you go there?
- What would you expect to find or learn?
- What would be the most helpful piece of information or assistance you would like in terms of energy reduction?

Moderator to record information sources on the computer screen

There are a variety of different ways of informing businesses on how to use energy more efficiently. I would now like for you to complete an online poll for me regarding the most effective way to communicate information about using energy more efficiently. This poll will consist of the following two questions:**[Moderator launches poll]**

1. **Of the methods below, which three (3) do you think would be the <u>most effective</u> means to inform businesses on how to use energy more efficiently?**

⇒ **In-person meetings**
⇒ **In-person seminars/workshops**
⇒ **Print material, such as brochures and pamphlets**
⇒ **Telephone discussions**
⇒ **Information on a website**
⇒ **Webinars**
⇒ **Social media (Facebook & Twitter)**
⇒ **Email**
⇒ **Trade shows**
⇒ **Advertising**
⇒ **Other**

2. **Which of the following would be of interest to your business? (Select all that apply)**

⇒ **Attending a free workshop about how to reduce your company's use of electricity**

⇒ **Participating in a rebate program designed to promote the use of energy efficient lighting among Newfoundland and Labrador businesses**
⇒ **Visiting a website set up to show helpful hints about how businesses can save on electricity**
⇒ **Receiving valuable guidance and rebates when your business buys and installs energy efficient electrical products such as HVAC, refrigeration, and so forth**
⇒ **On-site review of your existing equipment to assess potential areas where you can reduce your company's energy usage**

I'll give you a few moments.

Once you've completed the questions, please press submit. **[Moderator shares results with participants and provide a summary of the poll results]**

Questions related to the first poll question:

- What is your preferred method of communication? Why?
- What is your least preferred method of communication? Why?
- Are some methods more effective than others? Which ones? Why?

Probe for specifics regarding advertising (i.e., tv, radio, business publications), social media and websites

Questions related to the second poll question:

- Which of the activities in the second question have the most appeal? Why?
- Which of the activities have the least appeal? Why?

Key Elements of an Energy Efficiency Program	**20 minutes**

If you were designing an energy efficiency program for businesses…

- What would you include? Anything else?
- Why should this be part of the program offering?
- What would be important to communicate? Why is that important?

Moderator to record the items identified on the computer screen so all participants have access to the list

I would now like to share with you a description of a possible energy efficiency program that would be designed for small to medium size businesses like yours.

Moderator to read the description aloud and also provide the written description on the computer screen

Customized Energy Efficiency Opportunities
Interested in how to make your business more energy efficient, take advantage of rebates and save money over the long term? Call our business efficiency experts at takeCHARGE! They will visit your premises and provide advice on how to implement your own customized energy efficiency project. takeCHARGE will pay $0.10/kWh of your first year energy savings up to a maximum of $50,000. Call and see how takeCHARGE can help you pay for those energy efficiency improvements!

- What, if anything, do you like about this offering?
- What stands out or should be highlighted that would be a benefit to your business?
- What, if anything, do you not like or find confusing?
- What questions and/or concerns do you have about this proposed offering?
- What, if anything, is missing?

I'd like you to send me one more **chat message**. Please type in – yes or no - whether you would participate in this program, and why?

Moderator to ask each participant to share their suggestion with the group

- Any final thoughts / suggestions?

Thanks & Closure:

Thank you for your input. On behalf of the NL Power and the takeCHARGE Energy Savers Rebate Program I would like to thank you for taking time out of your busy schedule to share your thoughts.

Moderator to inform participants that the incentives will be distributed either by mail or pay pal as they indicated during the recruitment

takeCHARGE! Process and Market Evaluation
(June 2014)

takeCHARGE Process and Market Evaluation Final Report

Newfoundland Power and Newfoundland Labrador Hydro

Prepared by KEMA Consulting Canada, Ltd.
6/23/14

Table of Contents

EXECUTIVE SUMMARY 1
Introduction 1
Evaluation Objectives 1
Summary of Key Findings 3
Key Recommendations 14

1 INTRODUCTION 1-1
1.1 Background 1-1
1.2 Organization of Report 1-1

2 OBJECTIVES AND METHODOLOGY 2-1
2.1 Evaluation Objectives 2-1
2.2 Evaluation Methodology and Approach 2-2

3 PROCESS ANALYSIS AND FINDINGS 3-1
3.1 Program Design and Implementation 3-1
3.2 Program Participation and Achievements 3-6
3.3 Program Marketing and Outreach 3-6

4 CUSTOMER SURVEY FINDINGS 4-1
4.1 Characterization of Program Participants and Non-participants 4-1
4.2 Customer Motivation for Participation 4-5
4.3 Customer Program Satisfaction 4-7
4.4 Program Awareness 4-14

5 PROGRAM PARTNERS 5-1
5.1 Contractor Surveys 5-1
5.2 Retailer Surveys 5-9

6 MARKET ANALYSIS 6-1
6.1 Baseline Market Characterization 6-1
6.2 Attribution Analysis 6-13
6.3 Market Potential Estimates 6-23
6.4 Recommendations for Potential Exit Strategies 6-37

7 IMPACT METHODOLOGY BEST PRACTICES 7-1
7.1 Gross Savings Methodologies 7-1
7.2 Net-to-Gross Methodologies 7-2
7.3 Recommended Impact Methodology for the *takeCHARGE* Programs 7-5

8 CONCLUSIONS AND RECOMMENDATIONS 8-1
8.1 Summary of Findings 8-1
8.2 Key Recommendations 8-11

9 APPENDIX A –PARTICIPANT SURVEY 9-1

10 APPENDIX B - NON-PARTICIPANT SURVEY 10-1

11 APPENDIX C – RETAILER SURVEY 11-1

12 APPENDIX D – CONTRACTOR SURVEY 12-1

List of Exhibits

Table E-1: Process and Market Evaluation Objectives...2
Table E-2: Data Collection Plan for Process and Market Evaluations...3
Table E-3: Free Ridership Estimates 6
Table E-4: Participants Implementing Additional Measures and Spill Over Question Responses.............7
Table E-5: Non-Participant Spill Over 7
Table E-6: Net Market Potential, Free Ridership and Spill Over– *takeCHARGE* Programs.......................9
Table E-7: Net Market Potential – *takeCHARGE* Programs.. 10
Table E-8: Net Market Potential – *takeCHARGE* Insulation Program 11
Table E-9: Net Market Potential – *takeCHARGE* ENERGY STAR Windows Program 12
Table E-10: Net Market Potential – *takeCHARGE* Programmable and Electronic Program 13

Table 2-1: Process and Market Evaluation Objectives.. 2-1
Table 2-2: Key Research Questions and Data Collection Methods 2-2
Table 2-3: Data Collection Plan for Process and Market Evaluations.. 2-4
Table 2-4: *takeCHARGE* Participant Sample Sizes 2-5
Table 2-5: *takeCHARGE* Non-Participant Sample Sizes 2-5
Table 2-6: Customer Survey Precision Levels 2-5
Table 2-7: Eligibility, Response and Final Sample Weights 2-6
Table 2-8: Participating Retailer Sampling Weights.. 2-6
Table 2-9: Contractor/Builder Survey Completes 2-7
Table 2-10: Sample Distribution by Contractor Type.. 2-8
Table 3-1: Summary Program Staff Marketing Feedback 3-8
Table 3-2: Retailer Response on their Marketing of Products Since 2009 3-9
Table 4-1: Reasons for Being Dissatisfied with Program Measure Installed 4-8
Table 4-2: Reasons for Being Dissatisfied with Rebate Amount 4-9
Table 4-3: Reasons for Being Dissatisfied with Timeliness to Receive Rebate 4-10
Table 4-4: Reasons for Being Dissatisfied with Rebate Application Form/Paperwork 4-12
Table 4-5: Reasons for Being Dissatisfied with Contractor/Retailer 4-13
Table 5-1: Profile Contractors Survey Respondents 5-1
Table 5-2: Overview of Installed Features in 2009-2012 by Participant Respondent 5-5
Table 5-3: Non-Participants contractors - Overview of Installed Features in 2012-2013 5-6
Table 5-4: Retailer Interview Completes.. 5-9
Table 5-5: Types of Thermostats Sold Since 2009 5-13
Table 5-6: Frequency of Customer Inquiries about Insulation 5-15
Table 6-1: Insulation in Non-Participant Homes 6-2
Table 6-2: Location of Non-Participant Insulation Installations.. 6-3
Table 6-3: Reasons Participants Did Not Install Additional Measures.. 6-4
Table 6-4: Types of Insulation Sold by Retailers 6-4
Table 6-5: R-value of Insulation Sold by Retailers 6-5
Table 6-6: Window Type for Non-Participants 6-6
Table 6-7: Window Type Penetration for Non-Participants.. 6-7
Table 6-8: Number of Windows Purchased by Non-Participants.. 6-7
Table 6-9: Type of Windows Purchased by Non-Participants Since 2009 6-7
Table 6-10: Types of Windows Sold by Retailers Since 2009 6-9
Table 6-11: Average Number Thermostat Types by Region 6-9
Table 6-12: Quantity and Type of Thermostats Purchased 6-10
Table 6-13: Types of Thermostats Sold by Retailers Since 2009 6-11
Table 6-14: Program Effect on Timing of Purchases 6-15
Table 6-15: Number of Months Later Measures Installed in Absence of the Program...................... 6-16
Table 6-16: Free Ridership Responses.. 6-17
Table 6-17: Free Ridership Estimates... 6-18
Table 6-18: Average Number of Measures Installed Outside of the Program 6-19
Table 6-19: Participant Spill Over Actions Influenced by Program 6-20
Table 6-20: Participants Who Planned to Install the Measures if did not Participate in the Program ... 6-20
Table 6-21: Participant Changes in Household Energy Management 6-20
Table 6-22: Participant Changes in Household Energy Management Influenced by Program 6-21

Table 6-23: Participants Implementing Additional Measures and Spill Over Question Responses 6-22
Table 6-24: Non-Participant Spill Over 6-23
Table 6-25: Number of Residential Customers Eligible for the *takeCHARGE* Programs 6-23
Table 6-26: Number of Participants in the *takeCHARGE* Programs 6-24
Table 6-27: Number of Non-participants Eligible for the *takeCHARGE* Programs 6-24
Table 6-28: Gross Market Potential for Basement Insulation among All *takeCHARGE* Participants 6-25
Table 6-29: Gross Market Potential for Attic Insulation Among *takeCHARGE* Participants 6-26
Table 6-30: Number of Non-Participants with Insulation Levels Below *takeCHARGE* Minimum Requirements 6-27
Table 6-31: Non-Participant Awareness of Rebates 6-28
Table 6-32: Non-Participant Gross Market Potential Estimates 6-29
Table 6-33: Market Potential for ENERGY STAR Windows Among Participants 6-30
Table 6-34: Gross Market Share Non-Participants for ENERGY STAR Windows 6-31
Table 6-35: Market Potential for Programmable and Electronic Thermostats Among Participants 6-31
Table 6-36: Market Potential for Electronic and Programmable Thermostats Among Non-participants 6-32
Table 6-37: Net Market Potential – *takeCHARGE* Insulation Program 6-34
Table 6-38: Net Market Potential – *takeCHARGE* ENERGY STAR Windows Program 6-35
Table 6-39: Net Market Potential – *takeCHARGE* Programmable/Electronic Thermostats 6-36
Table 7-1: Strengths, Limitations, and Best Applications of Alternative Methods to Estimate Annual Gross Savings 7-1
Table 7-2: Applications of Attribution Assessment Methods by Type of Programs 7-5
Table 8-1: Free Ridership Estimates 8-3
Table 8-2: Participants Implementing Additional Measures and Spill Over Question Responses 8-4
Table 8-3: Non-Participant Spill Over 8-4
Table 8-4: Net Market Potential, Free Ridership and Spill Over– *takeCHARGE* Programs 8-6
Table 8-5: Net Market Potential – *takeCHARGE* Programs 8-7
Table 8-6: Net Market Potential – *takeCHARGE* Insulation Program 8-8
Table 8-7: Net Market Potential – *takeCHARGE* ENERGY STAR Windows Program 8-9
Table 8-8: Net Market Potential – *takeCHARGE* Programmable and Electronic Thermostat Program .. 8-10

Figure 3-1: Example of ENERGY STAR Window Rebate Program: Project Options, Costs, and Available Rebates 3-1
Figure 3-2: Insulation Rebate Program: Project Options, Measure Costs, and Available Rebates 3-2
Figure 3-3: Thermostat Rebate Program: Measure Options and Available Rebates 3-3
Figure 3-4: *takeCHARGE* Window Rebate Program Marketing Brochure – Side One. 3-7
Figure 3-5: *takeCHARGE* Window Rebate Program Marketing Brochure – Side Two. 3-8
Figure 4-1: Location Breakdown of Survey Respondents 4-1
Figure 4-2: Type of Home 4-2
Figure 4-3: Year Home Built 4-2
Figure 4-4: Size of Home 4-3
Figure 4-5: Number of Stories in Home 4-3
Figure 4-6: 2012 Income 4-4
Figure 4-7: Level of Education 4-4
Figure 4-8: Main Reason for Installing Program Measures* 4-5
Figure 4-9: Other Reasons for Installing Program Measures* 4-6
Figure 4-10: Importance of Knowing Amount of Insulation Rebate *takeCHARGE* Program Offers 4-6
Figure 4-11: Increased Likeliness to Participate in *takeCHARGE* Program If Know Rebate Amount 4-7
Figure 4-12: Satisfaction with Program Measure Installed 4-8
Figure 4-13: Satisfaction with Rebate Amount 4-9
Figure 4-14: Satisfaction with Timeliness to Receive Rebate 4-10
Figure 4-15: Satisfaction with Rebate Application Form/Paperwork 4-11
Figure 4-16: Satisfaction with Contractor/Retailer 4-12
Figure 4-17: Noticeable Reduction in Energy Bill 4-13
Figure 4-18: Awareness of *takeCHARGE* Rebates before Contacting Contractor/Retailer 4-14
Figure 4-19: Any Type of Program Measure in Mind before Contacting Contractor/Retailer 4-15
Figure 4-20: Type of Program Measure in Mind before Contacting Contractor/Retailer 4-15
Figure 4-21: Role of Contractor/Retailer in Selecting Program Measure* 4-16
Figure 4-22: Program Measure Features Emphasized by Contractor/Retailer* 4-17
Figure 4-23: Did Contractor/Retailer Present Different Models? 4-17
Figure 4-24: Did Contractor/Retailer Present Price Quotes? 4-18

Figure 4-25: Are Energy Efficient Options Significantly More Expensive than Alternatives 4-19
Figure 4-26: Awareness of Newfoundland Power and Hydro's *takeCHARGE* Programs 4-20
Figure 4-27: Types of Equipment *takeCHARGE* Program Offers 4-20
Figure 4-28: Reasons for Not Participating in *takeCHARGE* Programs 4-21
Figure 5-1: Insulation Market Share by Customer Segment 5-11
Figure 5-2: Window Sales by Customer Segment 5-11
Figure 5-3: Retailer Thermostat Sales by Customer Segment 5-12
Figure 5-4: Participating Retailer Reported Sales of Thermostats by Type 5-13
Figure 6-1: Insulation Market Share to Contractors Since 2009 6-5
Figure 6-2: Insulation Market Share to DIY Customers Since 2009 6-6
Figure 6-3: Window Sales Volume to Contractors Since 2009 6-8
Figure 6-4: Participating Retailer Reported Sales of Thermostats by Type 6-11
Figure 6-5: Thermostat Market Share to Contractors Since 2009 6-12
Figure 6-6: Thermostat Market Share to DIY Homeowners Since 2009 6-12
Figure 6-7: Likelihood of Installing Measures Without the Program 6-14
Figure 6-8: Participants Who Implemented Additional Measures 6-18

EXECUTIVE SUMMARY

Introduction

Newfoundland Power and Newfoundland Labrador Hydro (Hydro) began offering joint energy efficiency programs to their residential customers in 2009. The *takeCHARGE* programs were a suite of programs offered by Newfoundland Power and Hydro (the Utilities). The *takeCHARGE* programs include the following:

- Insulation Rebate Program – provides rebates for insulating basement walls, basement ceilings and attic and crawl spaces
- Thermostat Rebate Program – offers rebates for programmable and electronic thermostats with a temperature rating of +/- 0.5 degrees Celsius
- ENERGY STAR Windows Rebate Program – provides rebates for purchasing and installing ENERGY STAR certified windows.

The *takeCHARGE* programs are offered to homeowners with electric space heat or a supplemental heating system whose annual electricity usage equals or exceeds 15,000 kWh. Furthermore, the customers' home must be their primary residence and be a detached, semi-detached or mobile/modular home on a permanent foundation.

In November 2013, the Utilities selected DNV GL to conduct a process and market evaluation of the *takeCHARGE* programs. The primary objectives included:

- Provide an assessment of the effectiveness of program delivery from the customer and program partners' perspectives
- Gain an understanding of barriers to program success and operational effectiveness
- Provide an in-depth examination of the adoption rates and motivations for installing the technologies offered by the programs for both program participants and non-participants.
- Determine the current and remaining effectiveness of these programs as market intervention strategies, and program performance characteristics that should be considered when the Utilities develop a strategy for retiring the *takeCHARGE* programs.

The evaluation period for the study was 2009 through 2012. Given that the *takeCHARGE* programs have been fully implemented and actively marketed to customers, retailers and contractors, the Utilities keen interest in this study was to focus on the market characterization aspects of the study. Therefore, the study included a detailed analysis of the market baseline practices, program attribution and remaining market potential for each program.

Evaluation Objectives

The primary focus of the process evaluation was to provide an assessment of the effectiveness of program delivery from the customer and program partners' perspectives, and an understanding of barriers to program success and operational effectiveness. The market evaluation provided an in-depth examination of the adoption rates and motivations for installing the technologies offered by the programs for both program participants and non-participants. Table E-1 shows the key objectives for each evaluation.

Table E-1: Process and Market Evaluation Objectives

Process and Market Evaluation Objectives
Process Evaluation Objectives
• Assist with the development of exit strategies for the three residential *takeCHARGE* programs including determining major factors and market penetration levels for consideration for exit strategy development.
• Determine barriers that limit program performance and attitudes toward programs for retailers, contractors, builders and non-participants.
• Review each program partners' processes and level of engagement for opportunities for improvement in the three residential programs.
• Recommend the best practice approaches for conducting an impact evaluation for the ENERGY STAR windows, programmable thermostats and basement and attic insulation programs.
Market Evaluation Objectives
• Estimate the total sales of ENERGY STAR windows and programmable thermostats in Avalon, Rest of Island and Labrador during the evaluation period of 2009-2012 and expected future market trends.
• Estimate the baseline shares of various window, thermostats and insulation technologies, using the results of vendor surveys.
• Estimate the upper and lower bounds of the portion of those market shares that could be attributed to the programs.
• Confirm installation (actual compliance level) and free ridership level in each of the three residential programs.
• Determine rate or estimated quantity technology adoption of ENERGY STAR windows, programmable thermostats and basement insulation "outside the program" that could be attributed to effects of the program (spill over).
• Identify factors that are driving or inhibiting the promotion and uptake of efficient products in the relevant technologies.

Based on the findings of the two components of the evaluation, recommendations were provided regarding an appropriate exit strategy for the programs. In addition, the results of this study were used to recommend the best practice approaches for conducting an impact evaluation for the ENERGY STAR windows, programmable thermostats and basement and attic insulation programs. Table E-2 summarizes the data collection activities that were undertaken to perform the study.

Table E-2: Data Collection Plan for Process and Market Evaluations

Target Group	Population	Sample Size	In-Depth Interviews	Quantitative Surveys
Utility Staff				
Newfoundland Power and Hydro Program Staff	24 individuals who design, implement and evaluate the programs	6 Total	X	
Contractors & Builders				
Insulation contractors	Participating and non-participating builders and contractors in the sectors targeted by the programs	14 Participating 10 Non-Participating	x	x
Thermostat vendors and installers				
Window contractors				
Builders				
Customers				
Program Participants - in one or more *takeCHARGE* programs	Newfoundland Power = 4,851 Hydro = 156	151		X
Non-participants - who qualify are eligible for the *takeCHARGE* programs	Sample developed using NP and Hydro customer billing data	212		X
Retailers and Manufacturers				
Participating Retailers/Manufacturers	Actively Engaged Retailers - big box and smaller retailers	32		X
Non-participating	Retailers	5		X

Summary of Key Findings

Process Evaluation Findings

Overall, all three of the *takeCHARGE* programs were operating smoothly from the perspective of the program staff and retailer and vendors. Interviews with staff and vendors identified several key success factors for the program:

- The suite of *takeCHARGE* programs was cost effective and either met or exceeded all of its participation and savings goals in 2012.
- Many participants were repeat participants either within the same program or across programs.
- The turnaround time in processing rebates was short. This was corroborated by participants indicating a high level of satisfaction in the timeliness of their rebates, with 83% to 88% of participants either satisfied or very satisfied.
- Program staff recognized the critical role that retailers have in the programs. They used multiple recruiting and support mechanisms to solicit their involvement in the programs including, in store demonstrations, partnering on rebates, etc.
- Retailers and program staff both indicated that spiffs (i.e., a bonus or other compensation given to retail salespeople for promoting the products of a particular manufacturer) on products, particularly ENERGY STAR windows were very successful.

Both vendors and program staff identified several challenges and barriers to be addressed:

- The paper rebate forms for all programs were cumbersome and confusing. The program staff is in the process of offering a streamlined on-line version of the rebate form to customers. Program staff also actively encourages retailers to help customers to complete the form. However, some retailers found it difficult to fill out for customers.
- Some retailers stated that they were still confused about what the qualifications requirements for the measures and suggested more one-on-one interaction with program staff.

- The marketing and outreach efforts were broad and did not target specific geographies or customer types. Tailoring materials to specific customer segments such as rural customers or customers residing in older homes would further improve program penetration.

Customer Survey Findings

Overall, participating customers had very positive responses to nearly all aspects of the program. Awareness of the *takeCHARGE* programs and the offerings was high among non-participants. The key findings included:

- The demographic differences between participants and non-participants were not significant. However, non-participants typically had smaller single family homes, less than 1,000 square feet compared to participants.
- Nearly 50% of participants cited saving energy as the primary motivation for participating. For customers who stated they participated in the program because the existing measure failed, 59% of window participants indicated that as the primary reason for participating.
- Non-participants provided a wide range of reasons for not participating, such as personal preference, equipment did not qualify, etc., with no one response accounting for the majority.
- Knowing the amount of the insulation rebate before participating was an important program design feature to both participants (73%) and non-participants (63%).
- Overall, participants were very satisfied across all programs, ranging from 76% to 93%.
- Participants were generally happy with the rebate amounts; however 10% of insulation participants were either dissatisfied or very dissatisfied with their rebates.
- Participants were very satisfied with their retailers, 55% to 64% but participants said that retailers had a minimal influence on the type of equipment selected by the participant particularly for thermostats.

Program Partners

Contractors

The contractors interviewed for this study worked predominately in the new construction market. Given the construction boom in Newfoundland and Labrador, this was not surprising. Since having to comply with the new building code, the contractors stated that measures offered by the *takeCHARGE* programs were already incorporated into their standard design offerings. The contractors did provide some feedback and recommendations regarding the program marketing:

- Participating contractors particularly appreciate the opportunity of having a contact person at the utility to answer all their inquiries and support them with the programs' application.
- Add stickers to identify the program (similar to ENERGY STAR stickers for windows)
- Advertise in movie theatres citing the province's high movie attendance
- Include program materials when building approvals are issued

Perhaps the key finding from the contractor interviews was their perception and use of the program rebates. Overall, contractors in general have not expressed any particular need in promoting the programs' measures to their clients. Most contractors promoted the use of energy efficient features in their work without mentioning the *takeCHARGE* programs to their clients (unless the customer asks). Contractors often used energy efficiency as a selling point but did not mention the program to their customers to avoid customers ask for a lower selling price on the house or for concerns that the customer may apply for the rebates directly. Furthermore, the contractors and builders who included energy efficiency as part of their standard offerings viewed the *takeCHARGE* programs as an easy way to recover some of their investments in energy efficiency features that they would have made without the program. While the *takeCHARGE* programs are no longer offered to new construction customers due to the new building codes, contractors who include the energy efficiency options as their standard offerings for retrofit and remodelling projects are free riders.

Both participating and non-participating contractors expect the adoption of energy efficiency measures to continue in the future. Contractors identified a number of energy efficient products that will gain markets share in the coming years:

- Insulation - both attic and basement, with an increasing use of insulated concrete foams (ICFs) and blown-in insulation
- Future home automation - smart thermostats
- ENERGY STAR windows
- Heat recovery ventilators (HRV)
- On-demand hot water systems.

Retailers

In general, retailers were very satisfied, 90%, with the *takeCHARGE* programs but did offer several suggestions:

- Do more marketing / promotion of the program. A few retailers specifically asked for more in-store events.
- Increase or widen available customer incentives. Retailers offered a variety of responses within this topic; some simply wanted customers to get a larger incentive for an energy efficiency measure purchase and installation; other respondents wanted additional measures incented within the program offerings.
- Retailers wanted to be able to have the program application forms submitted on line. Since the evaluation period of this study, the on-line application process has been implemented by the Utilities.

Retailers stated that program measures provide good value to the participants, specifically:

- For ENERGY STAR window with the rebate they are the same price as standard windows
- The *takeCHARGE* rebate make the costs of electronic and/or programmable thermostats competitive with the cost of the manual units

Market Analysis

The evaluation period for this study was from 2009 through 2012, encompassing the program start-up phase through full scale implementation. Consequently, both program participants and non-participants have had a lengthy period of time to be exposed to the program. This was reflected in the high level of free ridership among customers and spill over among non-participants. However, it is important to recognize that the sample sizes for this study were relatively small and therefore in many cases the findings cannot be extrapolated to the population.

Free ridership is defined as the percentage of program savings that were incurred by participants who would have installed the measure in absence of the program. There are three components of free ridership that are analyzed and weighted to create an estimate of free ridership:

- Overall likelihood of purchasing the measure without the program
- The effect that that program had on the timing of the purchase of the measures
- The influence of the program on the quantity of measures purchased

The free ridership estimates was to classify to each response of the free ridership questions as a free rider, partial free rider or not a free rider. For example, if a participant responded that they were very likely to install the measure in the absence of the *takeCHARGE* rebate, they would be considered a 100% free rider. Conversely, if a participant stated that they were very unlikely to install the measure without the rebate, they were classified as not a free rider or 0% free rider. Some participant behavior may be partially influenced by the rebate offer but not entirely; these types of participants are considered a partial free rider. For example, if a participant said that they were somewhat likely to install the measures, they were considered a 50% free rider. Table E-3 shows the free ridership questions from the participant survey and the free ridership classification for the responses.

Table E-3 through Table E-5 show the free ridership and spill over for the *takeCHARGE* programs.

Table E-3: Free Ridership Estimates

Free-ridership Estimates	ENERGY STAR Windows	Programmable and Electronic Thermostats	Basement and Attic Insulation
Weighted: 50% likelihood/25% timing/25% quantity	62%	48%	53%
Only on Likelihood	53%	54%	64%
Only on Timing	82%	60%	59%
Only on Quantity	85%	78%	72%

The term "spill over" refers to a range of potential effects of energy efficiency programs. There are two types of spill over effects:

- **Participant spill over.** Participant spill over occurs when customers who have received financial and/or technical support for adopting an energy efficiency measure later purchase and install similar measures without using program incentives or services. To be counted as program effects, there must be some evidence that the customers in question took these actions as a result of their earlier participation in the program**.**
- **Nonparticipant spill over.** Nonparticipant spill over occurs when customers who have not participated in a program adopt the energy efficiency measures that the program supports as a result of the program. This could result from exposure to program-related public relations, vendor promotions, or word-of-mouth about the program and the benefits of efficiency measures.

Table E-4 shows the findings from questions that ask about the potential opportunities for measures among participants and the influence that their past participation had on influencing future participation. For example, 35% of ENERGY STAR Window participants have additional opportunities for other *takeCHARGE* measures, which could be additional ENERGY STAR windows or other measures. Of those respondents, 23% said that their past participation did influence their decision to purchase these measures.

Table E-4: Participants Implementing Additional Measures and Spill Over Question Responses

Participants	Spill Over Weight	ENERGY STAR Windows	Insulation	Programmable/ Electronic Thermostats
Do you have opportunities for the other technologies?		71	67	86
Yes		35%	33%	24%
No		60%	64%	75%
Did your participation in the program influence your decision to make these additional measures		25	22	21
Yes	100%	23%	44%	18%
No	0%	73%	56%	82%
Spill over Estimate		8%	14%	4%
Do you think you would have purchased and installed these additional measures if you had not participated in the program?		25	22	21
Yes	0%	87%	84%	91%
No	100%	13%	16%	9%
Spill over Estimate		5%	5%	2%

**Responses may not add to 100% due to some respondents citing Do Not Know and Refused as their responses*

Table E-5 focuses on non-participants who installed measures that were offered under the program and gauged their awareness of the program and the program's influence in selecting the measure.

Table E-5: Non-Participant Spill Over

Non-participants	Spill Over Weight	ENERGY STAR Windows	Insulation	Programmable/ Electronic Thermostats
Non-participants Who Installed Measures and Aware of Measures Offered in *takeCHARGE*		75	43	76
Yes		68%	57%	61%
No		28%	41%	33%
Based upon awareness, did you purchase measures that met the program requirements?		51	24	47
Yes	100%	73%	87%	66%
No	0%	18%	5%	34%
Spill over Estimate		50%	49%	40%

**Responses may not add to 100% due to some respondents citing Do Not Know and Refused as their responses*

Table E-6 through Table E-8 summarizes the remaining market potential by program and geography. The remaining market potential values reflect the potential number of program participants based up customer data analysed for the 2009 to 2012 program years. The net market potential was calculated for each *takeCHARGE* program as follows:

Net Market Potential = Gross Market Potential – Free ridership + Spill Over

It is important to recognize that customers can chose to participate in multiple programs. The program net potential numbers refer to total number of potential participants. This is particularly important regarding the *takeCHARGE* Insulation program. For example, if a customer participant installs attic insulation and basement wall insulation, they are count as two participants with savings associated with the individual measures in the program.

Tables E-6 and E-7 summarize the net market potential for the *takeCHARGE* Programs. It was based upon the following assumptions:

- Two program level market potential sums were created:
  - Maximum market potential assumed all participants and non-participants with additional measure opportunities install the measure. This value serves as the upper bound.
  - Market potential based upon the proportion of participants and non-participants who were aware of the program less the number of participants and non-participants who were not likely to install the measure.
- The free ridership value used in the analysis was the free ridership value based upon the responses to the likelihood of installing the measure, the influence of the rebate on the timing of the installation and the effect of the rebate on the quantity of the measure installed.
- The spill over for participants valued applied in the analysis was an average of the responses to the two spill over questions regarding the influence of the presence of the program on the purchasing decisions of the participants.

The high level of spill over attributable to non-participants helped to narrow the gap between the gross and net market potential estimates. However, this market analysis focused on four years of program experience, a length of time that can be sufficient to move the baseline practices of customers toward the energy efficient alternatives. This relationship will be discussed in greater detail in Section 6.3 regarding the exit strategies for the *takeCHARGE* programs.

Table E-6: Net Market Potential, Free Ridership and Spill Over– *takeCHARGE* Programs

	takeCHARGE Insulation Program				*takeCHARGE* ENERGY Star Windows Program				*takeCHARGE* Thermostat Program			
	Total	**Avalon**	**Rest of Island**	**Labrador**	**Total**	**Avalon**	**Rest of Island**	**Labrador**	**Total**	**Avalon**	**Rest of Island**	**Labrador**
Free Ridership	53%				62%				48%			
Spill Over												
Participant	5%				5%				2%			
Non-Participant	49%				50%				40%			
Net Market Potential=Gross Market Potential - FR + SO												
Max Number of Potential	122,642	62,466	48,377	11,799	23,785	14,291	8,620	874	42,611	26,925	14,589	1,097
Potential % less those who Chose Not to Install - Total	65,606	32,850	24,089	7,365	15,285	9,072	5,859	354	19,295	12,891	6,404	756

Table E-7: Net Market Potential – *takeCHARGE* Programs

	***take*CHARGE Insulation Program**				***take*CHARGE ENERGY Star Windows Program**				***take*CHARGE Thermostat Program**			
	Total	**Avalon**	**Rest of Island**	**Labrador**	**Total**	**Avalon**	**Rest of Island**	**Labrador**	**Total**	**Avalon**	**Rest of Island**	**Labrador**
Gross												
Max Number of Potential	129,344	66,177	50,841	12,326	29,352	17,946	10,397	1,010	47,813	30,171	16,457	1,185
Potential % less those who Chose Not to Install - Total	68,941	34,650	25,247	7,686	18,914	11,360	7,136	419	22,074	14,597	7,477	816
Net=Gross - FR + SO												
Max Number of Potential	122,642	62,466	48,377	11,799	23,785	14,291	8,620	874	42,611	26,925	14,589	1,097
Potential % less those who Chose Not to Install - Total	65,606	32,850	24,089	7,365	15,285	9,072	5,859	354	19,295	12,891	6,404	756

Table E-8: Net Market Potential – *takeCHARGE* Insulation Program

	Total Program				Participant				Non-participant			
	Total	Avalon	Rest of Island	Labrador	Total	Avalon	Rest of Island	Labrador	Total	Avalon	Rest of Island	Labrador
Gross												
Max Number of Potential	129,344	66,177	50,841	12,326	3,675	2,609	1,006	60	125,669	63,568	49,836	12,265
Potential % less those who Chose Not to Install - Total	68,941	34,650	25,247	7,686	1,346	996	330	20	67,595	33,653	24,918	7,666
Net = Gross - FR + SO												
Max Number of Potential	122,642	62,466	48,377	11,799	2,103	1,493	576	34	120,539	60,973	47,801	11,765
Potential % less those who Chose Not to Install - Total	65,606	32,850	24,089	7,365	770	570	189	12	64,836	32,280	23,901	7,353

The methodology used to derive the net market potential for the *takeCHARGE* insulation program was applied to the ENERGY STAR window program. Similar to the insulation program, the significant spill over in the non-participant sector narrows the difference between gross and net for ENERGY STAR windows. Furthermore, the penetration of ENERGY STAR windows in Labrador was extremely high exhausting the remaining market potential among participants. Table E-9 shows the net market potential results.

Table E-9: Net Market Potential – *takeCHARGE* ENERGY STAR Windows Program

	Total Program				Participant				Non-participant			
	Total	**Avalon**	**Rest of Island**	**Labrador**	**Total**	**Avalon**	**Rest of Island**	**Labrador**	**Total**	**Avalon**	**Rest of Island**	**Labrador**
Gross												
Max Number of Potential Participants	29,352	17,946	10,397	1,010	4,734	3,475	1,225	34	24,619	14,471	9,172	976
Potential less % Chose Not to Install	18,914	11,360	7,136	419	3,146	2,140	973	33	15,768	9,219	6,163	386
Net = Gross - FR + SO												
Max Number of Potential Participants	23,785	14,291	8,620	874	2,120	1,556	548	15	21,665	12,735	8,072	859
Potential less % Chose Not to Install	15,285	9,072	5,859	354	1,409	958	436	15	13,876	8,113	5,423	340

Table E-10 presents the net market potential in each of the region for the *takeCHARGE* Programmable and Electronic Thermostat Program. As discussed in the gross analysis, there is no remaining potential for thermostats in the Labrador region based upon the responses in this survey. However, we reiterate that the findings from this size of survey sample may not be indicative of the population of eligible customers in Labrador. Again, high awareness of the program and its influence on purchasing patterns among non-participants yielded high spill over rates which drove up overall market potential.

Table E-10: Net Market Potential – *takeCHARGE* Programmable and Electronic Program

	Total Program				Participant				Non-participant			
	Total	**Avalon**	**Rest of Island**	**Labrador**	**Total**	**Avalon**	**Rest of Island**	**Labrador**	**Total**	**Avalon**	**Rest of Island**	**Labrador**
Gross												
Max Number of Potential Participants	47,813	30,171	16,457	1,185	4,562	2,780	1,781	-	43,251	27,391	14,676	1,185
Potential less % Chose Not to Install	22,074	14,597	7,477	816	3,128	1,712	1,416	-	18,946	12,885	6,061	816
Net = Gross - FR + SO												
Max Number of Potential Participants	42,611	26,925	14,589	1,097	2,545	1,551	994	-	40,065	25,373	13,595	1,097
Potential less % Chose Not to Install	19,295	12,891	6,404	756	1,745	955	790	-	17,550	11,936	5,615	756

Key Recommendations

Process and Program Design Recommendations

Overall, the suite of *takeCHARGE* programs was operating smoothly and delivered a high level of satisfaction to customers, vendors and to the Utilities. However, there were several areas of program design and delivery that could be modified or strengthened.

- Continue to seek and implement procedures to streamline the participation burden on customers and retailers. Offering an on-line solution should help to achieve this objective but program staff should continue to monitor and proactively modify processes as needed.
- Build upon the existing relationship with retailers and identify ways to provide more one-on-one support. Perhaps consider increasing the frequency that program staff directly contact retailers or offer a program 'hot line' for retailers with questions.
- Examine the market potential opportunities for offering new emerging technologies including:
  - Future home automation - smart thermostats
  - On-demand hot water systems.

Market Analysis Recommendations

The central recommendation stemming from the market analysis was what the next steps should be for the current configuration of the *takeCHARGE* programs. The results of this study indicate that the current *takeCHARGE* programs have effected changes in customers' and vendors' purchasing practices and creating a more efficient baseline market. The Utilities are now at a point when they are considering expanding their energy efficiency and examining their current offerings

Going forward the Utilities should give important consideration to the strong awareness of energy efficiency among existing customers and market actors (e.g., contractors, builders and retailers) and identified opportunities to leverage the residential construction boom in the region. DNV GL recommends that the Utilities should explore the following program options.

Existing Homes Market

1. Assess a Whole House Program or Bundle Energy Efficiency Measures

   A broader more comprehensive approach to the existing home market is to take whole house approach to energy efficiency. A whole house program would incentivize participants to implement all eligible measures rather than just installing a single measure e.g., attic insulation. This type of program focuses on improving the overall energy performance of the home and can potential capture additional savings opportunities. An alternative to the whole house approach would be to bundle a smaller sub-set of measures together e.g., attic insulation, basement ceiling and basement wall insulation with programmable thermostats.

2. Explore the Feasibility of a Secondary Refrigeration and Freezer Recycling Program

   Secondary refrigerators and freezers are not typically energy efficient. Secondary refrigerators are often the former primary refrigerators that have been replaced by homeowners with newer more efficient models. Secondary refrigerators that are in non-space conditioned areas (e.g., garages and basements) and are often fairly empty most of the year operate less efficiently. Utilities in the United States have implemented refrigeration and freezer recycling programs that remove the units from the grid. In these programs, refrigerators and freezers are picked up at the customers' home free of charge by a utility sanctioned contractor, the customer receives a rebate and the units are then disposed of by the contractor in an environmentally appropriate manner. The Utilities should explore the penetration of secondary refrigerators and freezers in their service territory to assess the applicability of this type of program.

3. Consider Including Water Saving Measures

   Residential water saving measures including low flow shower heads and faucet aerators may provide a low cost way to reduce the energy consumption of water heaters. These could be coupled as part of a whole system or bundled program.

New Construction Market

1. Consider Implementing ENERGY STAR New Homes Program

   There has been a large influx of income into the Utilities' region which has resulted in boom in the residential construction market with new larger homes being built. The implementation of the National Energy Code of Canada has helped to established more rigorous energy efficiency standards in new homes. The code incorporates many of the measures included in the current *takeCHARGE* programs. However, there are opportunities to obtain additional savings in new homes. Offering an ENERGY STAR New Homes Program is one option to push the energy savings opportunities further. The ENERGY STAR New Homes program focuses on the total performance of the home by establishing efficiency requirements for shell measures and building practices that exceed building code requirements and by requiring the implementation of ENERGY STAR appliances. This type of program is quite different than the Utilities' existing rebate programs and will require training contractors and buildings on the ENERGY STAR implementation and performance criteria. Also, the program will require inspection and certification processes.

2. Examine the Feasibility of Implementing a R2000 Compliant Program

   Another option to consider for the new construction market is to take the energy savings to an even higher level is to design and implement a program that meets the performance criteria set forth in the R2000 program. As with the ENERGY STAR New Homes Program, the R2000 program would require training contractors and builders on the R2000 requirements and would need to include inspection and certification processes to determine if the home meets the standards of the program.

1 INTRODUCTION

1.1 Background

Newfoundland Power and Newfoundland Labrador Hydro (Hydro) began offering joint energy efficiency programs to their residential customers in 2009. The *takeCHARGE* programs were a suite of programs offered by Newfoundland Power and Hydro (the Utilities). The *takeCHARGE* programs include the following:

- Insulation Rebate Program – provides rebates for insulating basement walls, basement ceilings and attic and crawl spaces
- Thermostat Rebate Program – offers rebates for programmable and electronic thermostats with a temperature rating of +/- 0.5 degrees Celsius
- ENERGY STAR Windows Rebate Program – provides rebates for purchasing and installing ENERGY STAR certified windows.

The *takeCHARGE* programs are offered to homeowners with electric space heat or a supplemental heating system whose annual electricity usage equals or exceeds 15,000 kWh. Furthermore, the customers' home must be their primary residence and be a detached, semi-detached or mobile/modular home on a permanent foundation.

In November 2013, the Utilities selected DNV GL to conduct a process and market evaluation of the *takeCHARGE* programs. The primary objectives included:

- Provide an assessment of the effectiveness of program delivery from the customer and program partners' perspectives
- Gain an understanding of barriers to program success and operational effectiveness
- Provide an in-depth examination of the adoption rates and motivations for installing the technologies offered by the programs for both program participants and non-participants.
- Determine the current and remaining effectiveness of these programs as market intervention strategies, and when and how the *takeCHARGE* programs should be retired

The evaluation period for the study was 2009 through 2012. Given that the *takeCHARGE* programs have been fully implemented and actively marketed to customers, retailers and contractors, the Utilities keen interest in this study was to focus on the market characterization aspects of the study. Therefore, the study included a detailed analysis of the market baseline practices, program attribution and remaining market potential for each program.

1.2 Organization of Report

This report presents the findings and recommendations from process and market analysis. Section 2 of the report discusses objectives and the methodology employed for the process and market analyses. Section 3 provides a detailed description for each program and presents the process evaluation findings. Results from the customer surveys including demographics, reasons for participating or not participating in the programs; satisfaction program and rebates; role and satisfaction with retailers and contractors are discussed in Section 4. Section 5 presents the observations and trends in customer purchasing patterns and in projects obtained through interviews with contractors and retailers. The market analysis is provided in Section 6. This section includes the baseline market assessment for participants and non-participants; attribution analysis (free ridership and spill over); remaining market potential and program exit strategy recommendations. Finally, Section 7 discusses best practices for impact evaluations and Section 8 summarizes the key findings and recommendations from the study.

2 OBJECTIVES AND METHODOLOGY

2.1 Evaluation Objectives

The DNV GL team conducted market and process evaluations of three residential *takeCHARGE* Energy Savers Rebate Programs:

- Insulation Rebate Program
- Thermostat Rebate Program
- ENERGY STAR Window Rebate Program

The primary focus of the process evaluation was to provide an assessment of the effectiveness of program delivery from the customer and program partners' perspectives, and an understanding of barriers to program success and operational effectiveness. The market evaluation provided an in-depth examination of the adoption rates and motivations for installing the technologies offered by the programs for both program participants and non-participants. Table 2-1 shows the key objectives for each evaluation.

Table 2-1: Process and Market Evaluation Objectives

Process and Market Evaluation Objectives
Process Evaluation Objectives
• Assist with the development of exit strategies for the three residential *takeCHARGE* programs including determining major factors and market penetration levels for consideration for exit strategy development.
• Determine barriers that limit program performance and attitudes toward programs for retailers, contractors, builders and non-participants.
• Review each program partners' processes and level of engagement for opportunities for improvement in the three residential programs.
• Recommend the best practice approaches for conducting an impact evaluation for the ENERGY STAR windows, programmable thermostats and basement and attic insulation programs.
Market Evaluation Objectives
• Estimate the total sales of ENERGY STAR windows and programmable thermostats in Newfoundland Power and Hydro service territories during the evaluation period of 2009-2012 and expected future market trends.
• Estimate the baseline shares of various window, thermostats and insulation technologies, using the results of vendor surveys.
• Estimate the upper and lower bounds of the portion of those market shares that could be attributed to the programs.
• Confirm installation (actual compliance level) and free ridership level in each of the three residential programs.
• Determine rate or estimated quantity technology adoption of ENERGY STAR windows, programmable thermostats and basement insulation "outside the program" that could be attributed to effects of the program (spill over).
• Identify factors that are driving or inhibiting the promotion and uptake of efficient products in the relevant technologies.

Based on the findings of the two components of the evaluation, recommendations were provided regarding an appropriate exit strategy for the programs. In addition, the results of this study were used to recommend the best practice approaches for conducting an impact evaluation for the ENERGY STAR windows, programmable thermostats and basement and attic insulation programs.

2.2 Evaluation Methodology and Approach

2.2.1 Overview of Data Collection

The market and process evaluations integrated data from five key primary data collection activities:

- Review of program background materials and documentation
- In-depth interviews with program staff
- Customer telephone surveys: program participants and non-participants
- Builder and contractor telephone interviews and surveys: participants and non-participants
- Retailer and manufacturer interviews: participants and non-participants.

Table 2-2 shows how each data collection task and/or survey instrument addressed the key research issues and evaluation objective.

Table 2-2: Key Research Questions and Data Collection Methods

Research Questions and Primary Data Collection Methods	Program Staff In-depth Interviews (IDI's)	Trade Ally Interviews & Survey	Customer surveys	Data Review*
1. What are the primary market imperfections that are common to the target market segments? (e.g., residential new construction and existing housing)	✓	✓		
2. What remaining barriers exist to wider adoption of the targeted measures?	✓	✓	✓	
3. How well is the current set of programs addressing the market imperfections?	✓	✓	✓	
4. What can be done to more effectively overcome the identified market imperfections and to increase the rate of customer acceptance and implementation of each end use measures included in the program?	✓	✓	✓	
5. Are the target market segments appropriately defined, or are there gaps or underserved segments that present an opportunity for the measures being promoted? (i.e., assess the remaining market)	✓	✓	✓	✓
6. What is the status of penetration of the energy efficient measures promoted through the programs?			✓	✓
7. Are the communication channels and delivery mechanisms appropriate for the target market segment?	✓	✓	✓	
8. How well does the program design meet the needs of contractors, equipment retailers, builders in promoting these measures to their customers?	✓	✓		
9. What barriers exist to the wider engagement of contractors, retailers and builders in promoting these measures?	✓	✓		
10. What were the motivations of participating customers for installing the measures through the program (i.e., free-rider analysis)		✓		✓
11. What is the level of satisfaction with the programs and the Utilities of each stakeholder group that is engaged with the program (e.g., customers, contractors, builders, retailers)		✓	✓	
12. Estimate the total sales of ENERGY STAR windows and programmable thermostats in Newfoundland and Hydro during the evaluation period of 2009-2012 and expected future market trends.		✓	✓	✓

Research Questions and Primary Data Collection Methods	Program Staff In-depth Interviews (IDI's)	Trade Ally Interviews & Survey	Customer surveys	Data Review*
13. Estimate the baseline shares of various window, thermostats and insulation technologies, using the results of vendor surveys.		✓	✓	✓
14. Estimate the upper and lower bounds of the portion of those market shares that could be attributed to the programs.		✓	✓	✓
15. Confirm installation (actual compliance level) and free ridership level in each of the three residential programs.		✓	✓	✓
16. Determine rate or estimated quantity technology adoption of ENERGY STAR windows, programmable thermostats and basement insulation "outside the program" that could be attributed to effects of the program (spill over).		✓	✓	✓

*Data Review refers to the review of background materials (e.g., written program materials, # of program measures purchased and/or installed, billing information)

Table 2-3 shows the sample sizes for each of the data collection tasks.

Table 2-3: Data Collection Plan for Process and Market Evaluations

Target Group	Population	Sample Size	In-Depth Interviews	Quantitative Surveys
Utility Staff				
Newfoundland Power and Hydro Program Staff	24 individuals who design, implement and evaluate the programs	6	X	
Contractors & Builders				
Insulation contractors Thermostat vendors and installers Window contractors Builders	Participating and non-participating builders and contractors in the sectors targeted by the programs	14 Participating 12 Non-participating	x	x
Customers				
Program Participants - in one or more *takeCHARGE* programs	Newfoundland Power = 4,851 Hydro = 156	151		X
Non-participants - who qualify are eligible for the *takeCHARGE* programs	Sample developed using NP and Hydro customer billing data	212		X
Retailers and Manufacturers				
Participating Retailers/Manufacturers	Actively Engaged Retailers - big box and smaller retailers	31		X
Non-participating	Retailers	5		X

2.2.2 Sample Design

2.2.2.1 Participant and Non-Participant Customer Surveys

The Utilities' provided the DNV GL team with an extract of the three *takeCHARGE* program participant files for the 2009 through 2012 program years and residential billing information. A non-participant population file was created by matching account numbers from the participant program file with the customer billing records and deleting any matching records. Both the participant and non-participant were stratified by three major geographies:

- Avalon
- Rest of Island
- Labrador

The sample size of 150 was allocated across geographies in proportion to the total number of residential customers in each region: Avalon 60%, Rest of Island 30% and Labrador 10%. Table 2-4 shows the sample quotas and the number of completed surveys by geography. Also, customers who participated in more than one program were interviewed about each of the programs they participated in between 2009 and 2012.

Table 2-4: *takeCHARGE* Participant Sample Sizes

Geography	Sample Quota	Sample Size (n)
Avalon	85	94
Rest of Island	50	50
Labrador	15	7
Total	**150**	**151**

A similar methodology was used to select the sample for the non-participant sample.

Table 2-5: *takeCHARGE* Non-Participant Sample Sizes

Geography	Sample Quota	Sample Size (n)
Avalon	126	127
Rest of Island	63	64
Labrador	21	21
Total	**210**	**212**

The sample sizes resulted in an overall precision level of 7.9% for the participant survey and 6.7% for non-participant survey at the 90% confidence level.

Table 2-6: Customer Survey Precision Levels

	Participants		Non-Participants	
Geography	Sample Size (n)	90% Confidence Interval Precision Level	Sample Size (n)	90% Confidence Interval Precision Level
Avalon	94	+/- 10.1%	127	+/- 8.7%
Rest of Island	50	+/- 13.8%	64	+/- 12.3%
Labrador	7	+/- 36.5%	21	+/- 21.38%
Total	**151**	**+/- 7.9%**	**212**	**+/- 6.7%**

The next step was to create sampling weights that were applied to the survey results to expand the survey data back to the original target population. The weighted estimates were computed in order to obtain unbiased estimates of the *population* – if sample weights had not been used then the simple descriptive statistics derived from the respondent data could be biased because sub-groups, in this case geographies, were not sampled at the same rate and respondents within subgroups do not respond to the survey with the same propensity.

For this study, a final sampling weight was created for each respondent as the product of two factors:

1. **The inverse of the probability of selection.** Houses were randomly selected for this study within strata defined by participation status and three regions (Avalon, Labrador and Rest of Island).
2. **An adjustment to correct for eligibility and nonresponse**. This adjustment was also computed by participation status and the three regions. Telephone numbers on the original frame were considered ineligible if they were a government, business, an otherwise ineligible housing unit type or if housing unit type could not be determined.

Table 2-7 provides a summary of the original frame count, the eligibility rate, the response rate and the final analytic weight for all strata. The survey concluded with nearly a 99% eligibility rate, a 2.8% response rate and the final analytic weights varied from 27 to 1,571.

Table 2-7: Eligibility, Response and Final Sample Weights[1]

Sampling Metric	Total	Participants			Non-Participants		
		Avalon	Rest of Island	Labrador	Avalon	Rest of Island	Labrador
Total Respondents	**363**	94	50	7	127	64	21
Eligibility Rate	**99%**	97%	99%	92%	92%	94%	100%
Response Rate*	**3%**	32%	30%	14%	14%	14%	0%
Final Sample Weight For Each Respondent		79	112	27	569	1,486	1,571

*Response rate is defined as the number of people who completed the survey divided by sum of the number of completed surveys and the number of non-respondents.

2.2.2.2 Retailer Survey

The Utilities' provided the DNV GL team with a list of the retailers participating in the *takeCHARGE* programs. Both Utilities define participating retailers as a retail establishment that sells one or more of the technologies offered in the programs, which have been actively contacted by one of the Utilities and have received promotional materials for the programs. While the sample sizes for the participating retailers were small, we wanted to ensure that the responses were weighted to the population and reflected the relative distribution of retailers between the two Utilities. Sampling weights for the participating retailers were created using the same methodology as described for the customer surveys. The response rates and sampling weights are shown in Table 2-8.

Table 2-8: Participating Retailer Sampling Weights

Sampling Metric	Total	Participants		
		Avalon	Rest of Island	Labrador
Sample Frame	**218**	120	78	20
Eligibility Rate	**98%**	95%	100%	100%
Eligible Population	**214**	114	78	20
Respondents	**31**	8	22	1
Response Rate	**56%**	40%	85%	11%
Sample Weight For Each Respondent		14.2857	3.5455	20.0000

DNV GL created a list of non-participating retailers in the Avalon, Rest of Island and Labrador regions. The list of retailers was compiled from public data sources and web researches and screened for participation during the interview. Non-participating retailers were defined as retailers that sold the technologies offered in the *takeCHARGE* programs but were either unfamiliar with the program or who had not received any promotional materials or had any contact with the Utilities regarding the program. In total five interviews were completed with non-participating retailers: three in Avalon, one in Rest of Island and one in Labrador. The weighting of the survey results for non-participants was not done due to the small sample sizes. The results for non-participating retailers cited in this study are unweighted descriptive statistics.

2.2.2.3 Builder and Contractor Survey

The DNV GL team conducted in-depth and quantitative interviews with participating and non-participating contractors in the Avalon, Rest of Island and Labrador regions. The Utilities provided the

[1]Note that customers can participate in multiple programs multiple times. Therefore these population numbers reflect the number of participants not number of customers. For example, a customer who participated twice would be counted as two participants.

DNV GL team with the list of participating contractors and builders. The sample frame for the non-participant contractors was developed based on data from the InfoUSA database for business establishments in each region. We selected the North American System Industry Classification System[2] (NAICS) categories that most closely corresponded to the windows, insulation and electric heating markets which included: residential builders and remodelers, insulation contractors, heating and cooling contractors, window installers, and home supply retailers. These records identified retailers and contractors by specialty and provided reasonably accurate records of numbers of employees, which was used as a proxy for volume of equipment or projects sold and/or installed. Despite narrowing the InfoUSA data extract to narrow subset of NAICS categories, the data still required significant processing to identify the contractors and builders who were active in the residential housing market during the evaluation period and involved in installing windows, insulation and thermostats. Of the original 524 business establishments only 104 businesses qualified as non-participating contractors and builders. Respondents were selected randomly from the qualified non-participating contractors.

In total 26 interviews and surveys were completed across the Utilities, 14 in-depth interviews with participating contractors, six in-depth interviews with non-participating contractors and six quantitative surveys with non-participating contractors. Table 2-9 shows the breakout of completed interviews by participant type, company and data collection instrument. The response rate for all participants was 20% and for non-participants was 11.5%.

Table 2-9: Contractor/Builder Survey Completes

Data Collection Instrument	Total	Participants - Completes			Non-Participants - Completes		
		Avalon	Rest of Island	Labrador	Avalon	Rest of Island	Labrador
In-depth Interviews	**20**	9	4	1	4	2	0
Quantitative Surveys	**6**	0	0	0	1	4	1
Total Respondents	**26**	9	4	1	5	6	1

Of the participating contractors, nine were located in Avalon, five were from the Rest of Island and one from Labrador. The results are presented in Section 5.1 and are reported by geography for the participating contractors. However given the small number of non-participant contractors, the findings for non-participants are not broken out by geography.

Out of 26 contractors interviewed, only two were specialized contractors. The majority of general contractors work in predominately in new construction.

Table 2-10 shows the distribution by contractor type.

[2] NAICS codes are used to identify a firm's primary business activity. NAICS codes were developed by the U.S. federal government in cooperation with Canadian and Mexican statistical agencies.

Table 2-10: Sample Distribution by Contractor Type

Contractor Type	TOTAL	Participants	Non-Participants
General Contractor: Predominately New Construction	13	10	3
General Contractor: New Construction and Remodelling	9	4	5
General Contractor: Remodelling Only	2	0	2
Specialised Contractor	2	0	2
TOTAL	**26**	**14**	**12**

- **Results of contractor and vendor interviews.** In the course of conducting many studies that seek to characterize market conditions through interviews with supply side actors, DNV GL has developed and refined methods to estimate market shares with relatively high levels of precision using a ratio estimator approach. The basic elements of this approach are as follows.
  - Sample Development. We used the InfoUSA database of business establishments for the sample frame. NAICS categories to be sampled included: residential builders and remodelers, insulation contractors, heating and cooling contractors, window installers, and home supply retailers. These records identify retailers and contractors by specialty and provide reasonably accurate records of numbers of employees, which is a usable proxy for volume of equipment or projects sold and/or installed. We grouped the firms by number of employees and by province. The sample was randomly selected from each size and geography group.
  - Weighting and computation of survey results. Vendor and contractor survey responses were weighted to reflect the number of units of the product category in question (insulation projects, thermostats, windows) reported as sold or installed by the sample establishment as well as by the population weight of the size stratum from which the firm was drawn. Where the questionnaire seeks responses in the form of a number or percentage—say, the percent of qualifying windows among all those that are installed —survey responses will be calculated using the combined ratio estimator $\hat{R}_c$:

$$\hat{R}_c = \frac{\sum_h \frac{N_h}{n_h} \sum_i B_{h_i} x_i}{\sum_h \frac{N_h}{n_h} \sum_i x_i},$$

where

i	=	sample contractor or vendor,
N_h	=	number of contractors or vendors in the population in sample stratum h,
n_h	=	number of contractors or vendors in the sample in stratum h,
B_{h_i}	=	contractor i's response (expressed as a number or percentage), and
x_i	=	number of relevant units contractor i reported sold or installed in the evaluation period.

If the question elicits a categorical response (e.g., yes/no), a B_{h_i} will be created for each possible response. For estimates of proportion, the selected response B_{h_i} = 1. For the response/s not selected, B_{h_i} = 0.

This procedure essentially weights responses by the reported number of units sold or installed for each sample firm, thus providing an explicit representation of market share. The use of the combined ratio estimator supports the estimate of a standard deviation and standard error for each variable. The standard errors will be used to calculate appropriate measures of precision for various kinds of results. For some variables, it is more appropriate to use the weighted mean or proportion of the stratified random sample, rather than the ratio estimator. This is the case, for example, in estimating the average number of units installed and, from those averages, the total for the population. It is important to recognize that given the relatively small sample sizes for the builder and contractor surveys, the weighted responses have very low levels of statistical precision and may not be representative of the population.

2.2.3 Market Sizing and Share Analysis

2.2.3.1 Estimation of Baseline Market Shares

The baseline market share of program-qualifying equipment and insulation projects was defined as the market share that would have obtained if the program had not been in place. This was an essentially unobservable quantity was estimated using the following data sources and analysis techniques.

- **Market share in Avalon, Rest of Island and Labrador prior to the program.** Data on this proxy for baseline market share can be developed through the customer surveys, contractor surveys, and older secondary data sources.
- **Building codes and product standards.** Codes and standards essentially identify a minimum standard. If efficiency standards are scheduled to be increased in the near future, they provide a trajectory for increases in market share of the qualifying equipment over time. Of course, compliance seldom reaches 100 percent due to compliance issues. Studies of code changes and enforcement can be used to generate trends in baseline share of equipment that meet impending changes in standards.

2.2.3.2 Estimate of Current Market Share and Future Trends

The key data collection tool for the market evaluation was the customer surveys. The customer survey data were used to characterize the effect of the program on their equipment purchases and was the principal method to estimate free ridership, spill over, and program net effects. The market analysis also estimated total sales and market share for each end-use technology offered in the programs, e.g., attic and basement insulation, thermostats and ENERGY STAR windows. Customer surveys, contractor surveys, and retailer/manufacturer surveys were used to develop estimates of the current baseline market share. The contractor and retailer surveys were used to provide perspective and corroboration for the estimates of free ridership and spill over rates generated from the participant and non-participant customer surveys.

The results of the market analysis of the net effects of the program on qualified measure market share and sales was one of the primary components for developing recommendations for exit strategies. Other factors shaping the exit strategy recommendations included customer awareness and understanding of product benefits, availability of efficient products, customer willingness to pay, and the degree to which vendors have integrated marketing of qualifying products into their overall business strategy and practices. These factors and their role in exit strategy decisions were included in the context of the process evaluation.

Generally speaking, manufacturer shipment data or retailer sales data provide the most accurate and analytically useful sales and market share information for construction and consumer product but due to the confidentiality regarding sharing such sensitive data is extremely difficult to collect. Thus, for the three product types supported by *takeCHARGE* programs, market size and market share of program-qualified products were estimated using the following information sources.

- **Results of the customer survey.** In the surveys of both participating and non-participating customers were asked whether they purchased and/or installed any of the three supported product types and if so, capture information on the timing, extent, efficiency rating, and other relevant details of the purchase. The results from the participant and non-participant surveys were weighted to estimate the portion of customers who purchased the goods and services in question over the evaluation, as well as the market share of qualifying goods and services. For insulation, qualifying projects were those that increased pre-existing levels to those supported by the program. For thermostats and windows, qualifying purchases included those that met program eligibility requirements.
- **Results of contractor and vendor interviews.** Similarly, the results of the contractor and retailer surveys were weighted as described above, to estimate the market share of the technologies offered through the *takeCHARGE* programs and to identify current and future sales trends for those products.
- **Secondary sources.** There were two secondary sources that were reviewed to corroborate market size and share of efficient models. These included:
  - Statistics Canada: Census of Canada 2011. The 2011 Census contains information on the number of housing units of various types, number of business establishments by type and various measures of size, and other kinds of information that can be used in estimates of market size.
  - Natural Resources Canada: Survey of Household Energy Use 2007. This document contains data at the regional level (Atlantic Provinces) on most of the elements needed to estimate market size for the products supported by the *takeCHARGE* programs. These include saturation and purchase within the past five years of attic, wall, and sill insulation, saturation of electronic and programmable thermostats, and saturation of single, double, and low-e windows. These data are developed from a large, well-structured sample, including 267 homes in Newfoundland and Labrador.

2.2.3.3 Attribution, Free-ridership and Spill over

The formal definition of net program savings typically used in the energy efficiency evaluation industry is:

Net Savings = Verified Gross Savings Program savings – Free Ridership + Spill over.[3]

The basic concepts involved are relatively straightforward. Free ridership denotes implementation of measures that participants in the program would have undertaken during the evaluation period even if the program had not been offered. Free ridership accounts for the fact that most technologies supported by energy efficiency programs are already established in the market and that many program participants' motivation and capability to undertake energy efficiency projects is generally higher than average for the target population. The term "spill over" refers to a range of potential effects of energy efficiency programs. Analysts and regulators identity the following types:

[3] For a recent example of treatment of this topic in the industry, see: State and Local Energy Efficiency Action Network. 2012. *Energy Efficiency Program Impact Evaluation Guide*. Prepared by Steven R. Schiller, Schiller Consulting, Inc., www.seeaction.energy.gov.

- **Participant spill over.** Participant spill over occurs when customers who have received financial and/or technical support for adopting an energy efficiency measure later purchase and install similar measures without using program incentives or services. To be counted as program effects, there must be some evidence that the customers in question took these actions as a result of their earlier participation in the program.
- **Nonparticipant spill over.** Nonparticipant spill over occurs when customers who have not participated in a program adopt the energy efficiency measures that the program supports as a result of the program. This could result from exposure to program-related public relations, vendor promotions, or word-of-mouth about the program and the benefits of efficiency measures.

While the concepts of free ridership and spill over are relatively straightforward, estimating their magnitude generally is not. As is the case with estimation of baseline, which conceptually is related to both free ridership and spill over, neither free ridership nor spill over is directly observable. It is best to gather information from a number of sources to support a robust estimate of program net effects.

The principal method used for assessing attribution of observed changes in sales or market share of efficient equipment in this study focused on analysis of self-reports of program effects by reported by program participants and non-participants. This approach typically involved using the customer surveys to elicit their assessment of the program's influence on their decisions to adopt energy efficiency measures or practices. The participant batteries of questions structured to probe the effect of the program on the timing, extent, and features of the projects in question, as well as the relative importance of the program versus other decision factors. In addition, the non-participant surveys included a complementary set of questions that assessed the type, timing and motivation for installing program eligible measures outside of the programs.

For this study and the nature of the equipment installed, we used customers' characterization of the effect of the program on their purchases as the principal method to estimate free ridership, spill over, and program net effects. We also estimated total sales of the end-use technologies addressed by the program and market share of efficient equipment in the Utilities' service territory, and develop an assessment of baseline market share using the results of the customer surveys, contractor surveys, and secondary sources. These latter analyses will be used to provide perspective and corroboration for the estimates of free ridership and spill over rates generated from the participant and non-participant customer surveys.

3 PROCESS ANALYSIS AND FINDINGS

3.1 Program Design and Implementation

This section will provide a brief overview of the program offerings and detail the process customers and program partners (i.e., retailers and contractors) go through in order to participate in the *takeCHARGE* ENERGY STAR Window, Insulation, and Thermostat Rebate programs.

ENERGY STAR Window Rebate Program

The ENERGY STAR Window rebate program offers a rebate at the rate of $2 per square foot of installed window to existing and new home owners who purchase and install Energy STAR Qualified windows in their home. Program managers and staff interviewed for this evaluation confirmed that the program ideally targets customers who own older homes with inefficient windows. The following is a matrix[4] detailing window size and market cost estimates, along with the rebate values available to a *takeCHARGE* participant.

Figure 3-1: Example of ENERGY STAR Window Rebate Program: Project Options, Costs, and Available Rebates

Window Size	Cost of Standard Window[1]	Cost of ENERGY STAR Window[1]	takeCHARGE Rebate
24" x 40"	$271	$293	$13
48" x 48"	$444	$496	$32
96" x 43"	$860	$999	$57

There are multiple eligibility requirements in order for participants to qualify for the ENERGY STAR Window Rebate program. They include homeowners must have an active electricity account, and the home itself should be a detached, semi-detached, or a mobile/modular unit on a permanent foundation. The home ultimately retrofitted with ENERGY STAR Window projects should be intended as a residence. Finally, the home should be either all-electric, or have a supplementary heating system is in place that the home has an annual electricity usage equal to or greater than 15,000 kWh. Customers with the above summarized eligibility requirements likely have the largest opportunity to "improve a home's building envelope and reduce space heating energy consumption."[5]

The customer participation process for the ENERGY STAR Window Rebate program is straightforward. If the customer is eligible to participate in the program, he or she purchases and installs ENERGY STAR Qualified windows in their home. The customer can get a program rebate application either from the web site, or in some instances, from their contractor or retailer directly. Program staff confirmed that retailers often drive the application process for the Windows program by educating customers about the program, having forms available when making the sale, and in some cases, assisting the customer in filling out the rebate forms. Once the project is complete the customer submits, by mail, a completed and signed

[4] From the *takeCHARGE* ENERGY STAR Windows Rebate Program web site. 2/17/2012. Available at: http://takeCHARGEnl.ca/
[5] Five Year Energy Conservation Plan, 2012-2016. Newfoundland Power – 2013/2014 General Rate Application. September, 2012.

ENERGY STAR Window Rebate Application to their electric utility. Customers also have to include purchase receipts, manufacturer detail that includes the windows' model numbers and the windows' gas status and frame size.

The program rebate web site states that participants can expect their rebate within eight weeks after submitting their application and supporting documentation. Rebates are most often awarded in the form of a credit to the participant's utility bill for the rebate amount; however, program staff stated that participants can and will be cut a check if they appeal to the utility and indicate they prefer a check rather than a bill credit.

About five percent of customers who install an energy efficiency measure through the *takeCHARGE* programs are subject to a post-installation audit after project completion. The program web site indicates that an inspection visit by the utility can happen at any point up to twelve months after installation. The program rebate form indicates that inspection window is up until 15 months after installation. Staff interviewed for this evaluation indicated that audit compliance is nearly 100%.

Insulation Rebate Program

The Insulation Rebate program targets Newfoundland Power and Hydro customers who have insulation deficits in their home, and offers rebates to program participants who choose to increase the insulation levels in their homes. Staff interviewed described this program as targeting owners of homes that were at least 20 to 25 years old with little or no basement insulation. Figure 3-2 provides details about project size, insulation (measure) choice, and available *takeCHARGE* rebates at each project / product price point.

Figure 3-2: Insulation Rebate Program: Project Options, Measure Costs, and Available Rebates[6]

Basement Size	Cost to Insulate[1]		takeCHARGE Rebate	
	R-12	R-20	R-12	R-20
1000 sq. ft.	$1,300	$1,750	$240	$400
1500 sq. ft.	$1,950	$2,600	$360	$600
2000 sq. ft.	$2,500	$3,500	$480	$800

The eligibility requirements for this program mirror those of the ENERGY STAR Windows Rebate program, detailed earlier. In short, a customer aiming to participate in the Insulation Rebate program must a) be a homeowner with an active electricity account, b) have an all-electric home or a supplementary heating system is in place that the home has an annual electricity usage equal to or greater than 15,000 kWh, c) own a home that's intended to be a residence and is detached, semi-detached, or a mobile/modular

[6] The program web site indicates that rebates are also available for ceiling projects, but that customers cannot receive rebates for both basement and ceiling insulation projects. Further, no rebate or price information appears available for ceiling projects.

home on a permanent foundation. Participants are not able to repeat rebate requests for the same project.[7]

The Insulation Rebate participation process is nearly identical to the Window Rebate program; that is, eligible customers complete an insulation project by purchasing and installing CSA approved insulation at one of the program designated R-values, acquire and complete a program rebate form – along with project receipts, and receive an on-bill credit for the program rebate amount.

Like other *takeCHARGE* programs, this program indicates that the customer's electric provider may conduct a post-installation visit to inspect the project.

Thermostat Rebate Program

The Thermostat Rebate program offers rebates to Newfoundland Power and Hydro homeowners who replace manual thermostats with programmable thermostats or electronic thermostats with a temperature rating of +/- 0.5 degrees Celsius. Figure 3-3 summarizes available thermostat options, approximates their purchase price, and highlights the corresponding program rebate through this ***takeCHARGE*** program.

Figure 3-3: Thermostat Rebate Program: Measure Options and Available Rebates[8]

Thermostat	Cost of Thermostat[1]	takeCHARGE Rebate
Programmable	$30-100	$10
Electronic +/- 0.5°C	$20-40	$5

The participation process of buying a measure, filling out and submitting a rebate form and necessary documentation, and receiving a rebate is nearly identical to other *takeCHARGE* rebate programs; however, retailers play a stronger role in the Thermostat program by partnering with utilities to promote the program and submit forms. The utilities work with the retailers to educate them about eligible thermostat measures, and retailers carry that information forward to customers as potential participants while they are in-store. Further, staff we interviewed described in-store events with retailers, and confirmed they worked with retailers to offer in-store promotions on measures matched by rebates during these events.

Rebates for this program are awarded through on-bill credits, and on-site visits or installation verification by the utility provider are again a possibility that accompanies program participation.

Overall *takeCHARGE* Program Design – Program Staff Feedback

Program staff report that they have had instances of repeat customers in some programs, or know of customers who have participated in multiple *takeCHARGE* program offerings, and indicated they believed that was a sign of customer satisfaction with program offerings and design. Others interviewed indicate they have received feedback from customers indicating that they liked various program measures. In particular, feedback about thermostats was positive.

---

[7] From the *takeCHARGE* Insulation Rebate Program web site. 2/17/2012. Available at: http://takechargenl.ca/residential/insulation-rebates/

[8] From the *takeCHARGE* Thermostat Rebate Program web site. 2/17/2012. Available at: http://takechargenl.ca/residential/thermostat-rebates/

Program Characteristics going well:

- Good relations with retailers. The program has the opportunity to provide a business case.
- Programs are pretty robust from a cost-effectiveness standpoint.
- The Windows program is going well, growing from a 10% to 70% share; however, staff claim the program is operating more strongly in urban areas.
- The Insulation program is also operating smoothly. The most popular project is increasing attic insulation from R20 to R 40; however, the "housing boom" in the region has made it more difficult to find available insulation contractors.
- The program [rebate] turnaround time is very good. Customers we surveyed within this evaluation confirm this staff declaration, indicating high levels of satisfaction with rebate credit payment.

Overall *takeCHARGE* Program Design – Challenges and Barriers

Program design challenges remain for customers and program partners, according to our staff interviews. One particular challenge heard numerous times in this evaluation was that application forms are a challenge for customers. The program still relies on a paper application, sent in via the mail, and does not currently have a system in place to support on-line applications. One staff detailed a related barrier: that they can't merge consumption data to check program eligibility.

Interviews revealed that program staff is currently working on tackling this barrier. In particular, program representatives are working with trade allies and retailers to do forms on site - and then collect the forms from retailers directly instead of having customers send in forms individually. Representatives also detailed a desire to move towards taking online applications in the near future, and specially, make forms "smarter" by helping customers to pre-populate some of the necessary customer information – such as pre-filling a customer's billing number into the form automatically.

Staff interviewed within this evaluation had the following suggestions for program improvement:

- Increase the range of measures offered; examples provided included lighting and water conservation measures
- Add additional program partners. Example possibilities include municipalities, provincial government, and Builder Associations
- Program promotion needs to be more grass roots. People need more personal convincing. Suspects the program has affected the purchasing of eligible equipment by non-participants, aka spill over

Retailer / Contractor Participation Process

Program Staff interviewed for this evaluation agreed that retailer and contractor engagement is a key program component. Newfoundland Power staff, in particular, stressed a focus on creating strong, positive relationships with retailers because they are relying on them to be a program promotion partners and energy conservation educators. They mention that retailers are the entity with the direct-to-customer relationship, and they have witnessed movement among some retailers (primarily big box) integrating the *takeCHARGE* programming options into general merchandising practices. Our interviews confirmed that there are no eligibility requirements, memoranda of understanding, or any formal agreement between retailer and program.

Most participating retailers are chain or independent hardware stores. Interviewed staff listed Home Depot, Costco, and a few branches of Canadian home center stores such as Rona, Kent, Timbermart as ready retailer partners. Home Hardware - independently owned and operated but in a buying coop– has the most store locations working with the programs in the service territories covered by these programs.

Program staff indicates that while there are a good number of retailers and contractors that work with *takeCHARGE* programs, not all who "participate" are active program partners. For example, interviewees indicate that only about one-quarter of the retailers actively partner with the program on a regular basis, including putting program messaging in their marketing efforts. Some partner retailers face additional challenges with putting local programming messages in larger corporate-based marketing materials. Staff had a more difficult time confidently assessing the participation rate of contractors.

Recruiting and Qualifying Participating Retailers and Contractors

Staff report using the following methods for retailer and contractor recruitment and/or engagement:

- Recruit directly from directories, through local government offices (for an introduction), via professional organizations or associations (i.e., Homebuilders Association --active only around St Johns) and "driving around"
- Establish partnership with retailers and contractors based primarily on increasing sales
- Demonstrate and educate on the retailer or contractor benefit of offering the rebate to their customers
- [retailer only] Coordinate discounts on the retailer end and in-store booths to promote rebates
- [retailer only] Ask retailers to put up POP materials.
- Educate retailers and contractors on the rebate / paperwork process, and ask them to assist customers. Retailers and contractors have seen the value in helping customers acquire their rebate easily and quickly – it increases customer satisfaction, and aids them in making the sale.

Qualifications for retailer and contractor participation have previously been suggestions rather than requirements. Desired retailer and/or contractor participant characteristics listed by our program staff interviewees include:

- Has a good inventory of program measures available for purchase in their store or to offer to a customer
- Open to program promotion via their customer conversations, their flyers, and through other marketing materials
- Considers offering a discounted measure price to get the best value for our customers that we can
- Has a solid company or store reputation (a.k.a., mindedness for customer service)

Several interviewed staff confirmed that – especially in connection with the ENERGY STAR Window Rebate program, there were spiffs[9] available in Newfoundland Power's and Hydro's service territories that specifically created a successful retailer/ program partnership in previous years. The Utilities asked retailers to fill in rebate forms in the store and submit, rather than wait for customers to fill out, and in return, sales staff was provided a $10 spiff for each rebate application submitted. Staff shared other stories of retailer engagement with program promotion and incentives have had a measureable impact in other program areas, as well – such as double rebates increasing program and rebate claim volume.

Retailer and Contractor Barriers:

Staff was able to name some specific barriers that exist in recruiting retailers and/or contractors to work with and help promote the program. Factors they named as barriers for area retailers or contractors include:

- Lack of staff time
- Lack of understanding of customer and business benefits
- Customer pushback over the application process

[9] A spiff is defined as a bonus or other compensation given to retail salespeople for promoting the products of a particular manufacturer.

- Some retailers and/or contractors view extra program promotion or customer assistance (i.e., filling out rebate applications for or with a customer) as outside of their core business.
- Some confusion still exists over measures and/or program qualifications. For example, interviews suggested the confusion that remained in the market between low voltage v. line voltage thermostat products. The *takeCHARGE* program only supports the latter, which are used to control electric baseboard.
- Some retail hardware stores are feeling “the boom” and are doing well with Do-It-Yourselfers. Incentives and/or business opportunities are not strong enough with the program to take it on.

Some staff suggests that -- in order to deal with these barriers --there is an opportunity for more one-on-one contact with retailers and builders to persuade them to provide more information to customers, and for them to acquire the necessary education to increase their awareness of program offers.

3.2 Program Participation and Achievements

Program staff we interviewed within this evaluation consistently identified that a main, overarching objective is to deliver on established energy savings targets. They reported that they rely on, and benchmark off of the annual energy savings goals that are established through the program within the context of the Five Year Plan. They further indicated that annual goals get broken down to annual quotas for various measures, and that goals are met in some years, some not.

takeCHARGE program staff detailed goals outside of participation totals and energy savings for 2013, as well – both in our process evaluation interviews and through program documentation. Within our interviews, they confirmed that meeting quantitative energy savings goals was accomplished through encouraging both business and residential customer participation, and that educating people overall about energy conservation possibilities was an overall program goal. They also mentioned that named developing relationships with participating trade allies, retailers, etc., and expanding market penetration of energy efficiency measures and programs is a key program priority.

A majority of these additional program objectives connected to increasing the use of specific marketing channels – such as the program’s web site – to educate customers, drive participation, and / or provide information to make decisions or claim their rebate. Section 3.3 will explore the marketing channels the program staff utilized in order to reach out to their customers, and report on customers’ feedback about program marketing that was collected during this evaluation.

3.3 Program Marketing and Outreach

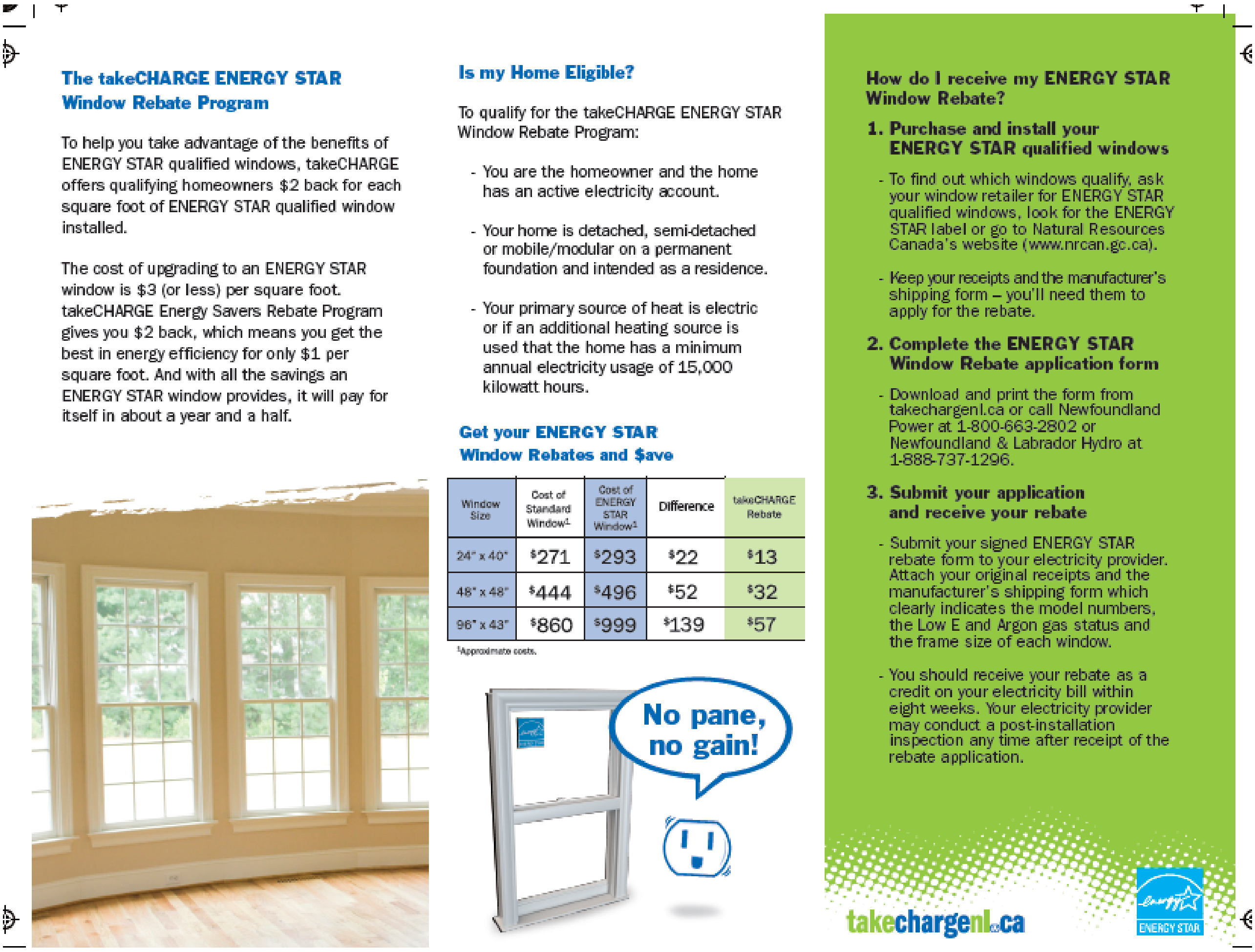
Marketing and Outreach – General:

Many of the program staff we interviewed indicated that program marketing to Newfoundland Power and Hydro customers happened on a mass, not targeted, scale. Those interviewed named marketing channels such as TV, radio, print ads, and bill stuffers; program contacts further provided program brochures and rebate applications for our evaluation review. Interviewees indicated mass marketing channels are favoured because of the territory characteristics; in particular, they are often trying to reach small pockets of customers within a “huge territory”. Still others mentioned that primary points of customer contact are the call center and web site, and the program used and had social media goals for the year. The DNV GL team reviewed the *takeCHARGE* web site and verified the program’s Twitter and Facebook accounts, respectively.

About half of the staff we interviewed volunteered that there was likely room for targeted *takeCHARGE* program marketing, in particular, one respondent offered the idea that energy consumption on energy bills could be used to ID high energy users about program offerings and measure installation opportunities. Others noted that while program messaging emphasizing a broad range of program benefits in the past, marketing is currently focused more on monetary rewards of program participation. Said one interviewee, "*In our market, money is the key motivator to inspire customer action. Other people in other markets may have stronger environmental motivations*." DNV GL's review of the marketing brochures provided by the program confirms that the messaging emphasize is on bottom line, pocketbook savings, such as the "*Get $300 Back!"* call-out message in Figure 3-4.

Figure 3-4: *takeCHARGE* Window Rebate Program Marketing Brochure – Side One.

Figure 3-5: *takeCHARGE* Window Rebate Program Marketing Brochure – Side Two.



The takeCHARGE ENERGY STAR Window Rebate Program

To help you take advantage of the benefits of ENERGY STAR qualified windows, takeCHARGE offers qualifying homeowners $2 back for each square foot of ENERGY STAR qualified window installed.

The cost of upgrading to an ENERGY STAR window is $3 (or less) per square foot. takeCHARGE Energy Savers Rebate Program gives you $2 back, which means you get the best in energy efficiency for only $1 per square foot. And with all the savings an ENERGY STAR window provides, it will pay for itself in about a year and a half.

Is my Home Eligible?

To qualify for the takeCHARGE ENERGY STAR Window Rebate Program:

- You are the homeowner and the home has an active electricity account.
- Your home is detached, semi-detached or mobile/modular on a permanent foundation and intended as a residence.
- Your primary source of heat is electric or if an additional heating source is used that the home has a minimum annual electricity usage of 15,000 kilowatt hours.

Get your ENERGY STAR Window Rebates and $ave

Window Size	Cost of Standard Window[1]	Cost of ENERGY STAR Window[1]	Difference	takeCHARGE Rebate
24" x 40"	$271	$293	$22	$13
48" x 48"	$444	$496	$52	$32
96" x 43"	$860	$999	$139	$57

[1]Approximate costs.

No pane, no gain!

How do I receive my ENERGY STAR Window Rebate?

1. Purchase and install your ENERGY STAR qualified windows

- To find out which windows qualify, ask your window retailer for ENERGY STAR qualified windows, look for the ENERGY STAR label or go to Natural Resources Canada's website (www.nrcan.gc.ca).
- Keep your receipts and the manufacturer's shipping form – you'll need them to apply for the rebate.

2. Complete the ENERGY STAR Window Rebate application form

- Download and print the form from takechargenl.ca or call Newfoundland Power at 1-800-663-2802 or Newfoundland & Labrador Hydro at 1-888-737-1296.

3. Submit your application and receive your rebate

- Submit your signed ENERGY STAR rebate form to your electricity provider. Attach your original receipts and the manufacturer's shipping form which clearly indicates the model numbers, the Low E and Argon gas status and the frame size of each window.
- You should receive your rebate as a credit on your electricity bill within eight weeks. Your electricity provider may conduct a post-installation inspection any time after receipt of the rebate application.

takechargenl.ca

ENERGY STAR

Opinions among program staff we interviewed were mixed on whether this was the "right" direction for marketing. Some interviewees indicated displeasure that the energy efficiency/conservation messaging is weak, and reported hearing this feedback from customers, as well.

Regardless of what they thought of program marketing overall, program staff we interviewed had clear comments about what is working well – and what is not – within the program marketing efforts. Their sentiments are summarized in Table 3-1.

Table 3-1: Summary Program Staff Marketing Feedback

Going well	What can be improved?
• Mass media marketing campaigns are good. • In-person events in the communities.	• Communicate financial benefits even more clearly (incl. cost reduction of measures through program participation). • Tailor marketing and services to rural customers. • Need more direct contact with customers and retailers: more direct mail, more events, community champions, testimonials.

Marketing and Outreach – via Program Partners

As described previously in this report, the program's design and process choices choose to educate and partner with retailers and contractors to market the program. Where possible, utility staff reach out to, promote, and train retailers and contractors in order to build program awareness, and they encourage these program partners to promote program rebates through their own flyers, in-store promotions, and through other marketing channels they utilize.

Staff we interviewed confirmed that some retailers (big box) have moved past marketing basics towards integrating programming into general merchandising practices. For example, they've added their own discounts, incentives, or rebates in some instances to *takeCHARGE* rebates, and then publicized the rebate programs in their own flyers. Staff went on to indicate they have had less success with similar Window retailers partners, but were unable to identify why this partnership is less robust.

Our retailer survey within this evaluation suggests that the retailer-program marketing connection is slightly stronger within the Avalon retailers, than among retailers within Hydro. Nearly all – or 94% -- of the retailers confirm they are doing more marketing of program products since 2009, compared to only 82% of retailers in Rest of Island and Labrador who make the same claim.

Table 3-2: Retailer Response on their Marketing of Products Since 2009

Retailer Response on Marketing	Total	Avalon	Rest of Island/Labrador
More Frequently	**91%**	94%	82%
Less Frequenty	**0%**	0%	0%
About the Same	**9%**	5%	18%

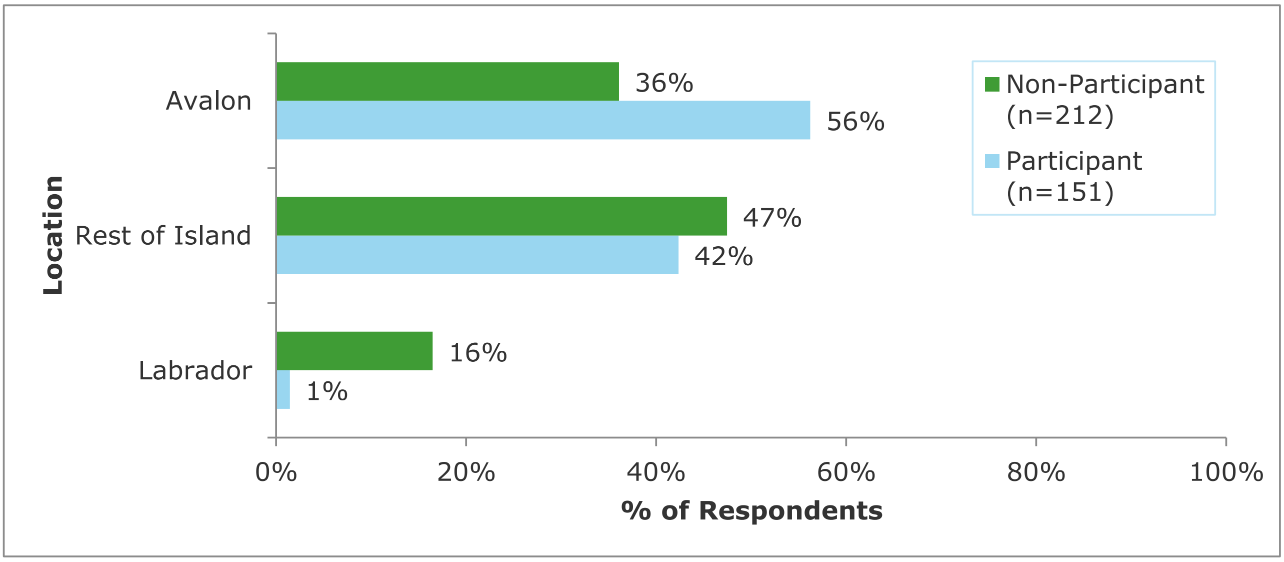
4 CUSTOMER SURVEY FINDINGS

This section presents the findings from the participant and non-participant customer surveys.

4.1 Characterization of Program Participants and Non-participants

Figure 4-1 presents the breakout of participating and non-participating customers surveyed in the Newfoundland Power and Hydro service areas that completed the *takeCHARGE* survey. Whereas most participant respondents came from Avalon, most non-participant respondents were from the "rest of island" (i.e., outside Avalon and Labrador).

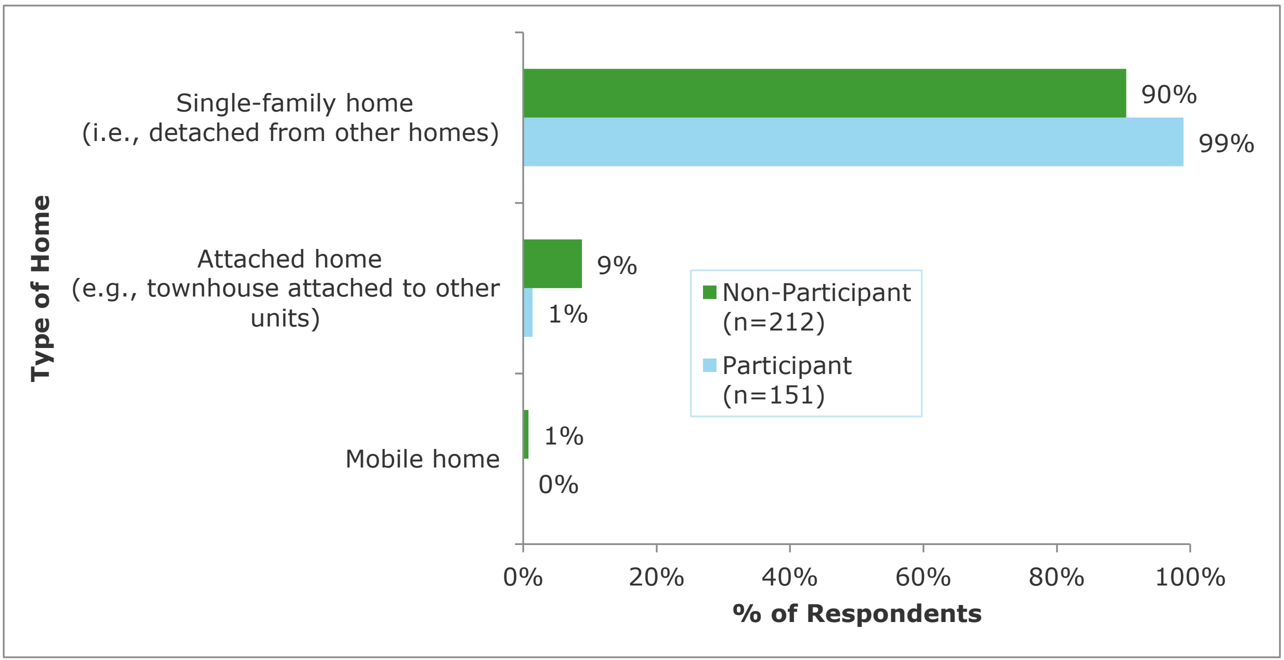
Figure 4-1: Location Breakdown of Survey Respondents



**May not sum to total due to rounding.*

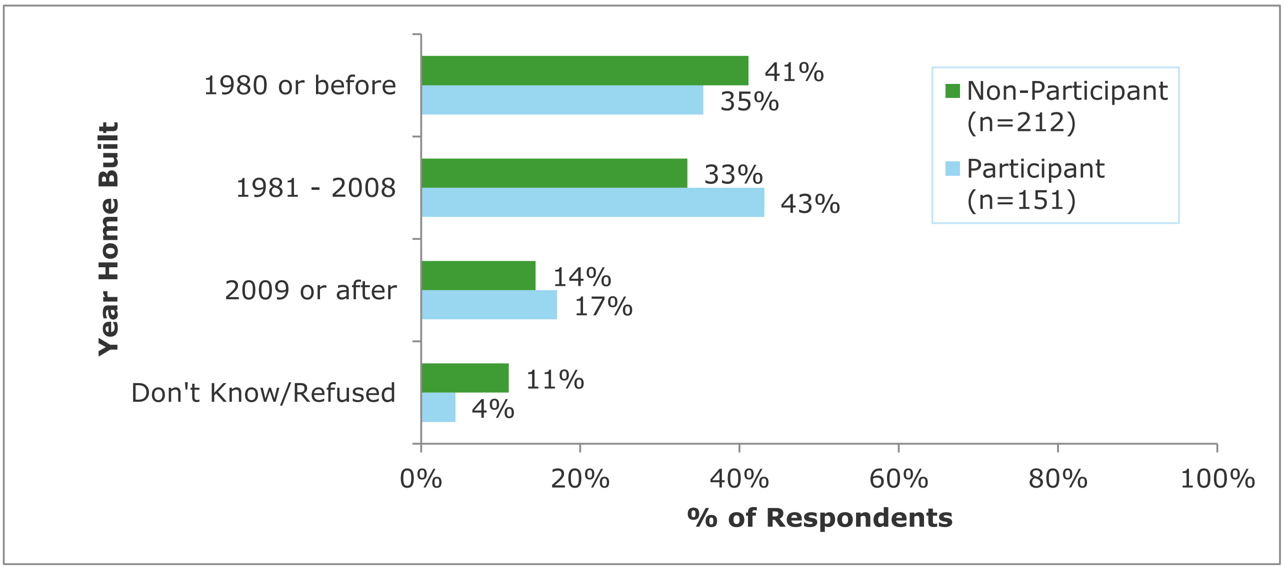
Figure 4-2 through Figure 4-6 displays additional demographic characteristics of the sample of participating and non-participating survey respondents. The figures show that *takeCHARGE* program participants and non-participants were fairly similar in terms of home type, age of home, size of home, and number of floors in the home, and income.

Figure 4-2: Type of Home



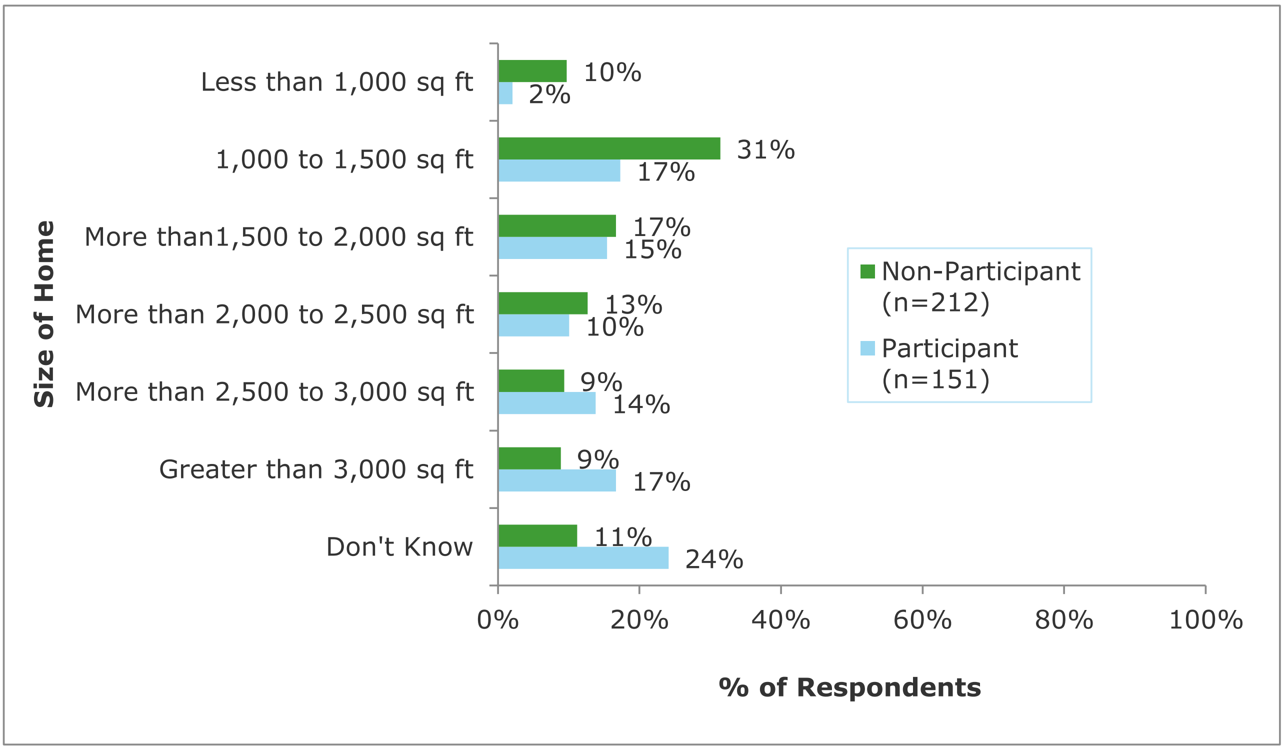
**May not sum to total due to rounding.*

Figure 4-3: Year Home Built



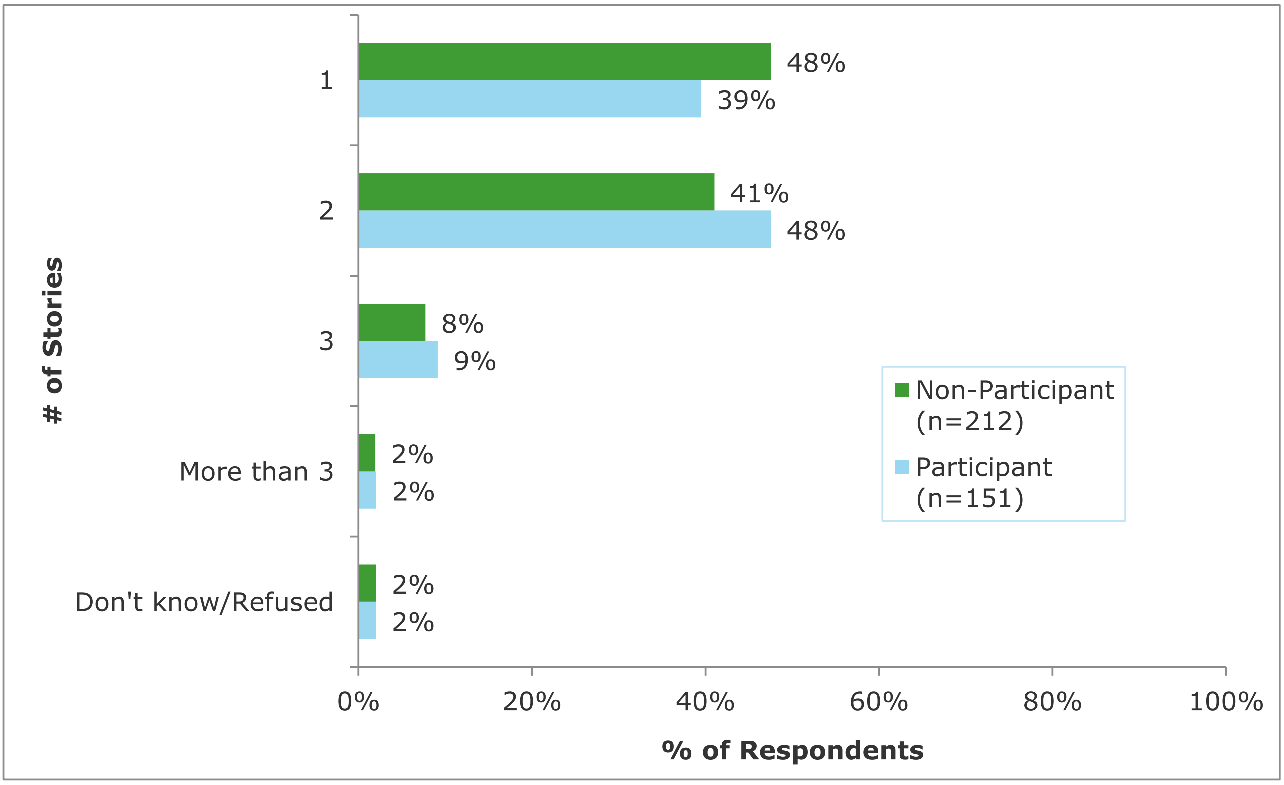
**May not sum to total due to rounding.*

Figure 4-4: Size of Home



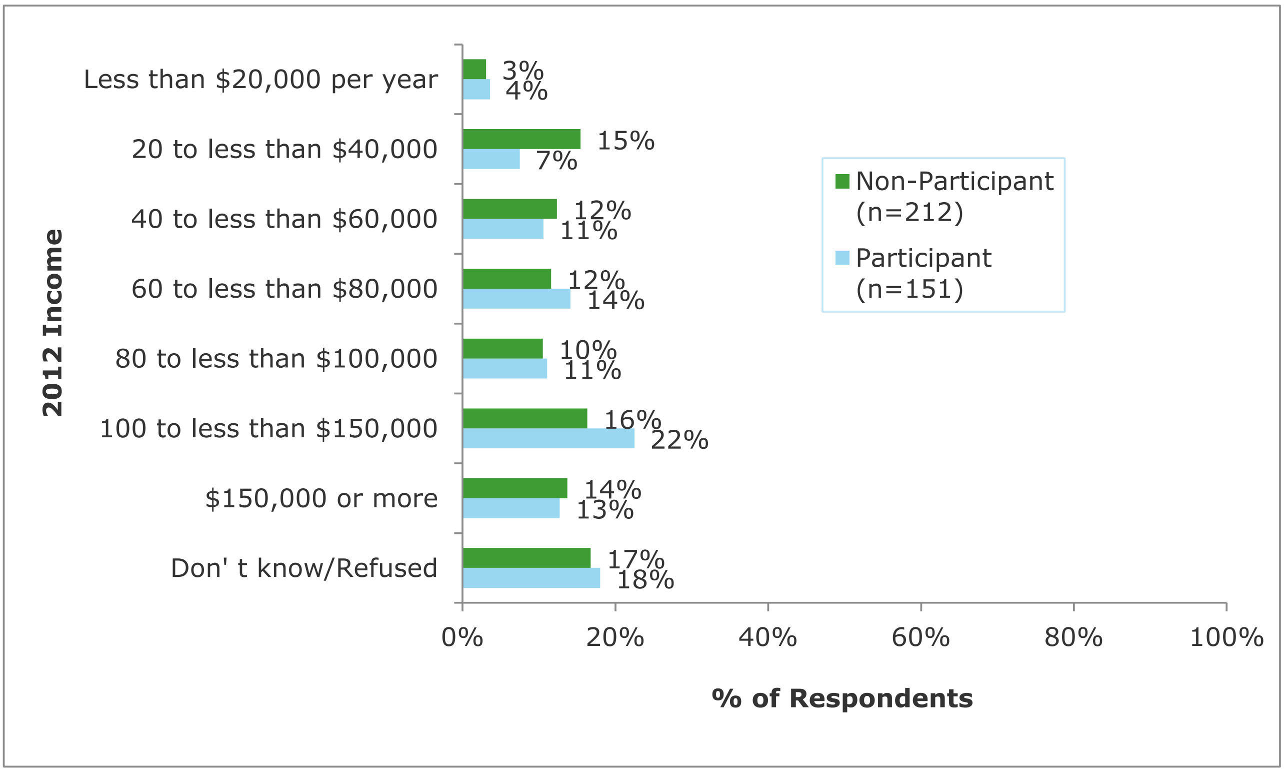
**May not sum to total due to rounding.*

Figure 4-5: Number of Stories in Home



**May not sum to total due to rounding.*

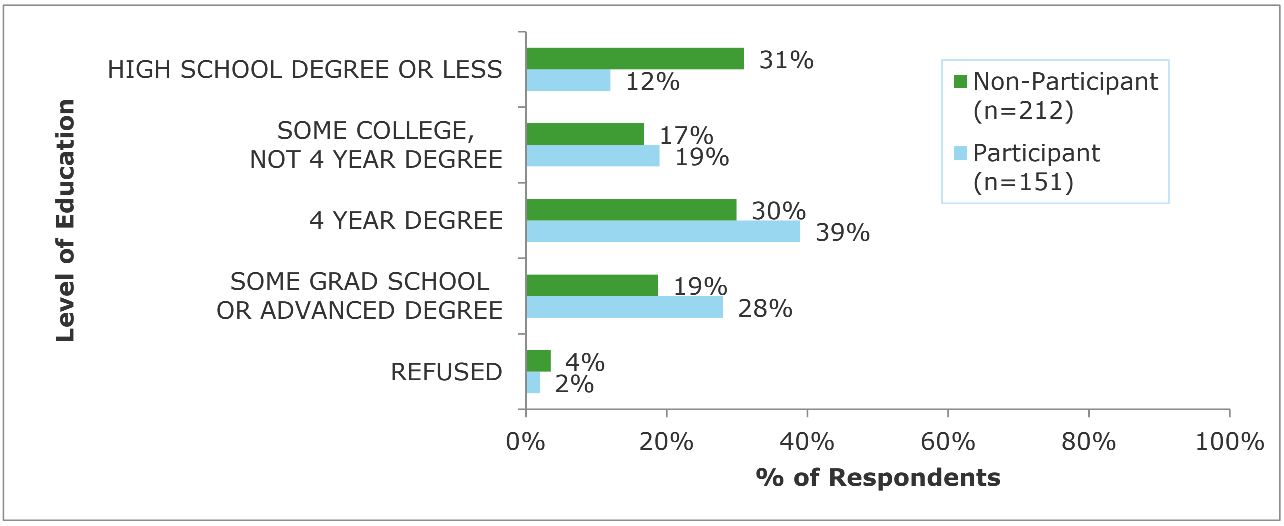
Figure 4-6: 2012 Income



**May not sum to total due to rounding.*

Figure 4-7 shows a variation between levels of education between participants and non-participants who completed the survey. Whereas more non-participant respondents had a high school degree or less than participant customers (31% vs. 12%), more participant respondents had a four year college degree or experience with graduate school than non-participant consumers (67% vs. 49%).

Figure 4-7: Level of Education

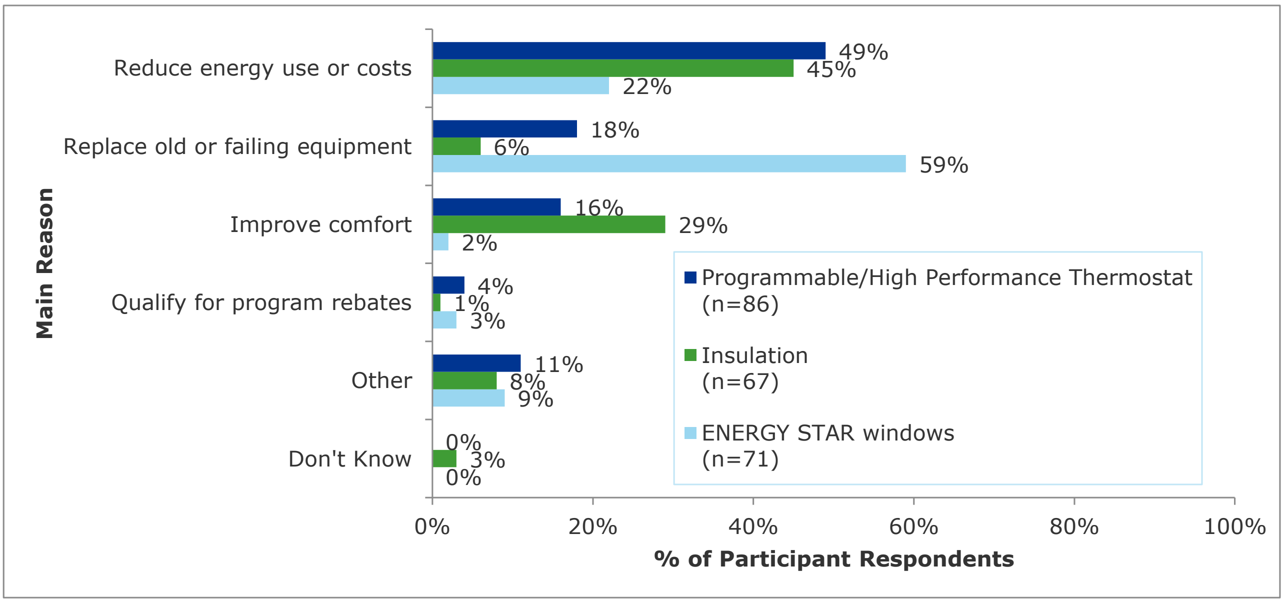


**May not sum to total due to rounding.*

4.2 Customer Motivation for Participation

Participant survey respondents were asked for the main reason they chose to install one or more program measures. Figure 4-8 shows the primary reason for almost half of participants who installed insulation (45%) and thermostats (49%) was to reduce energy or costs. Almost two-thirds of participants who installed ENERGY STAR windows (59%) indicate the primary driver was to replace old or failing equipment.

Figure 4-8: Main Reason for Installing Program Measures*

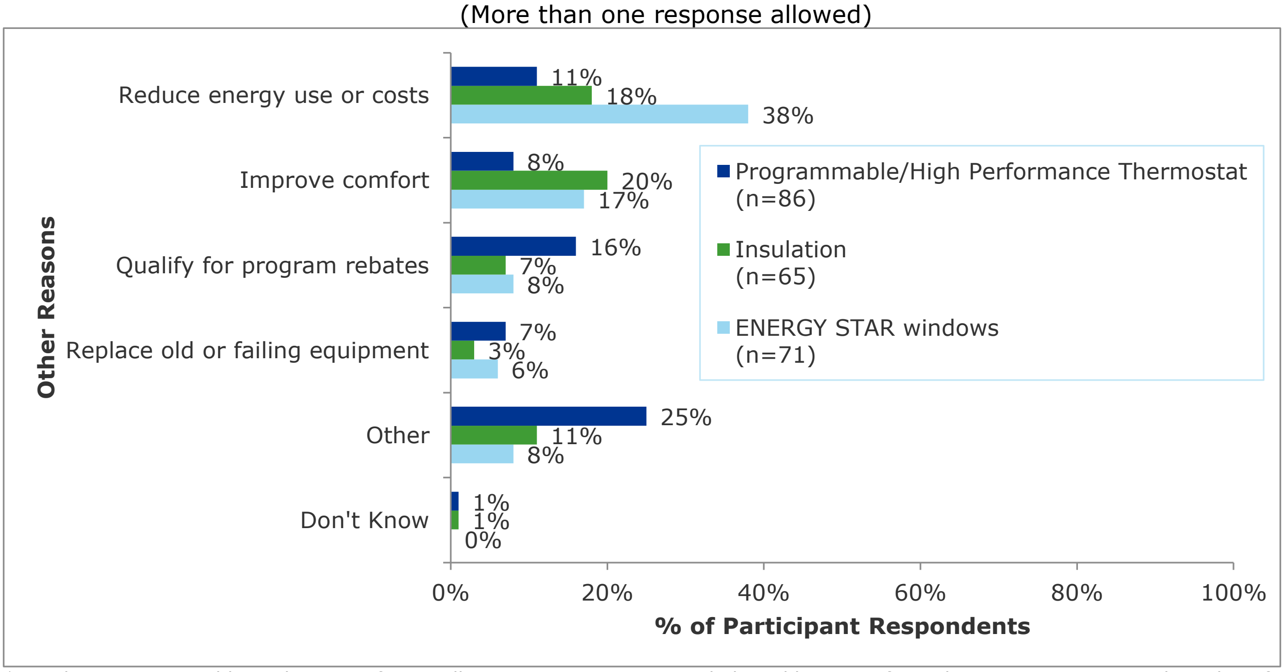


**To a lesser extent, additional primary reasons for installing program measures include: Add or reconfigure living space; Increase the value of the home; and Repair or replace exterior of the home.*

***May not sum to total due to rounding.*

Besides asking for the main reason participant survey respondents installed programs measures, the survey also asked participants if there were additional factors that influenced them to have program measures installed. Figure 4-9 shows that many of the other reasons participants had measures installed aligned with the primary reasons shown cited above with 1) reducing energy or costs; 2) improving comfort; 3) qualifying for program rebates and 4) replacing old or failing equipment being noted as either a primary or secondary reason for program measures.

Figure 4-9: Other Reasons for Installing Program Measures*

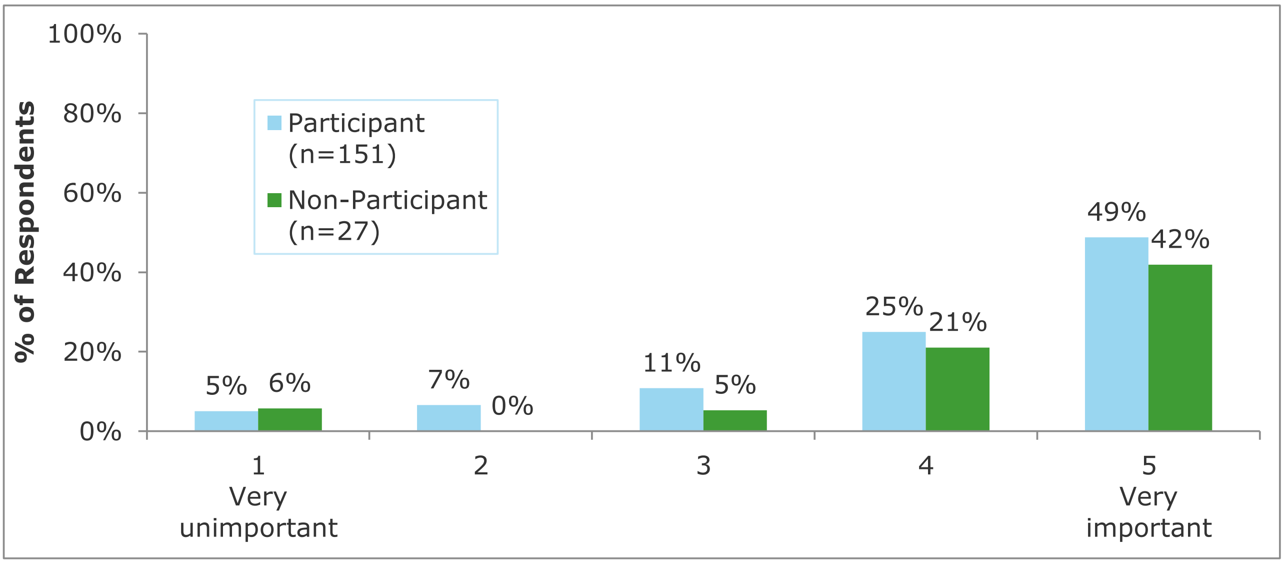


**To a lesser extent, additional reasons for installing program measures include: Add or reconfigure living space; Increase the value of the home; and Repair or replace exterior of the home.*

***May not sum to total due to rounding.*

Before participating, knowing the amount of insulation rebate offered by the *takeCHARGE* program was very important for 49 percent of participants and somewhat important for 25 percent of the participants. Non-participant survey respondents who purchased insulation since 2009 and indicated being aware of the *takeCHARGE* program were also asked how important it is to know the amount of insulation rebate they would be eligible under the program. Figure 4-10 shows that almost three-quarters of participants (74%) and almost two-thirds of non-participants (63%) consider it either very or somewhat important to know the rebate amount offered by the insulation program.

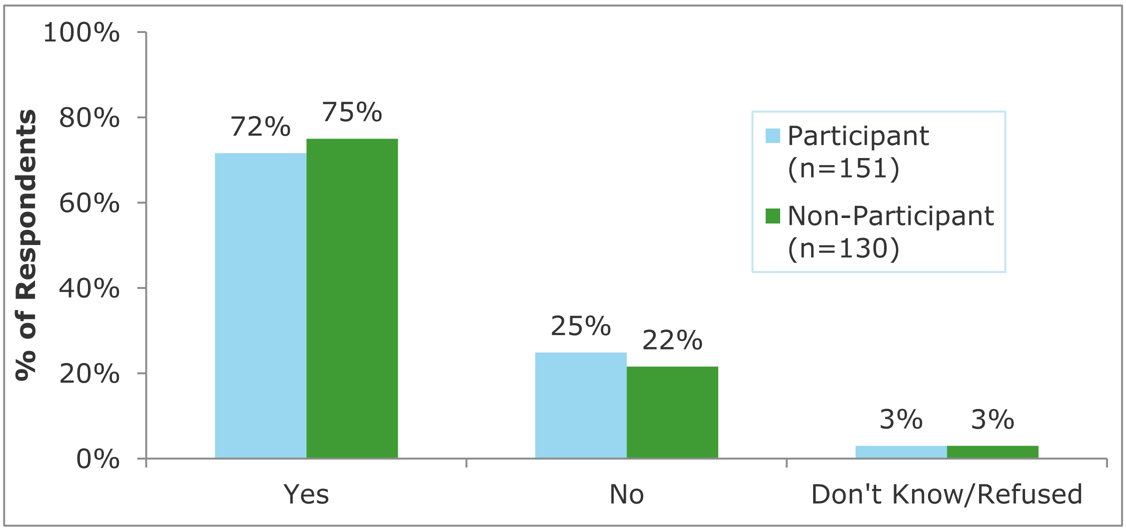
Figure 4-10: Importance of Knowing Amount of Insulation Rebate *takeCHARGE* Program Offers



**May not sum to total due to rounding.*

Both participant and non-participant survey respondents were asked if they were knowledgeable about the amount of the insulation rebate if they would be more likely to participate in the program. Figure 4-11 shows that about three-quarters of participants (72%) and non-participants (75%) report being more likely to make use of the insulation program if they were aware of the rebate amount offered.

Figure 4-11: Increased Likeliness to Participate in *takeCHARGE* Program If Know Rebate Amount



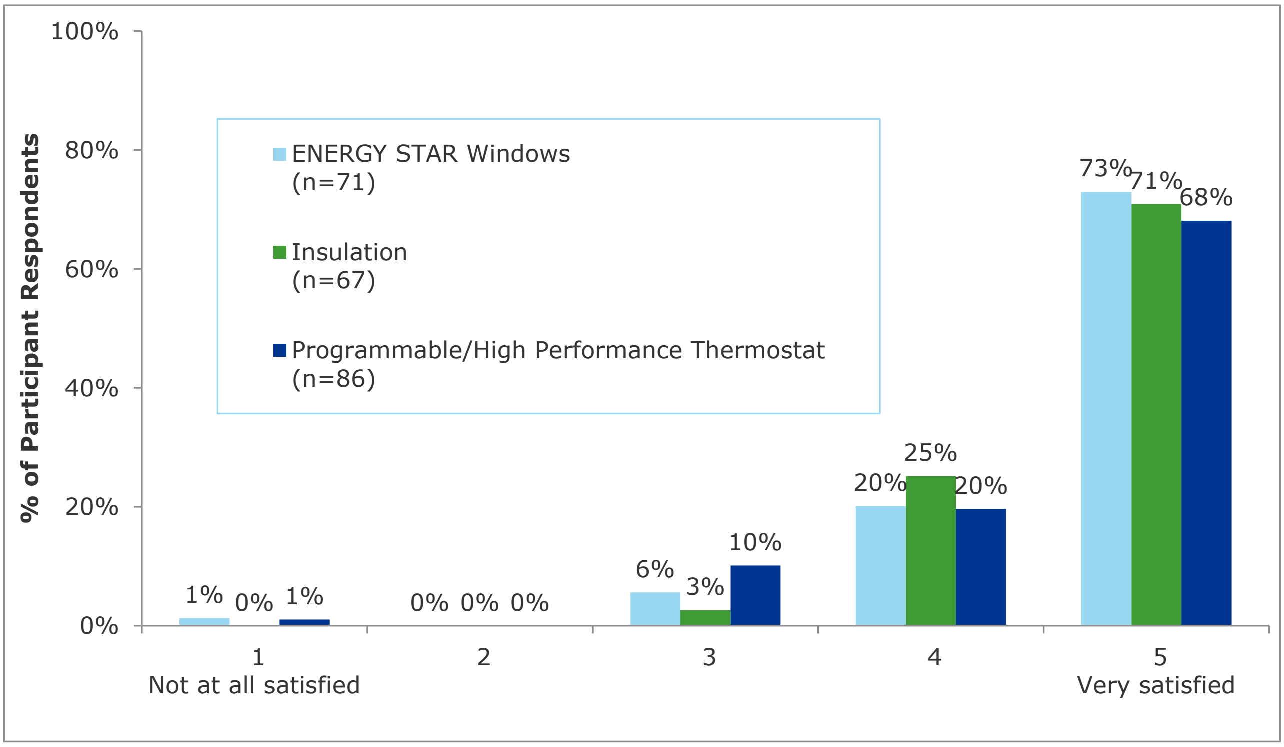
**May not sum to total due to rounding.*

4.3 Customer Program Satisfaction

Participating survey respondents having one or more program measures installed were asked how satisfied or dissatisfied they were with the program measure(s) they had installed using a five-point scale where five represented "very satisfied" and one represented "very dissatisfied."

Figure 4-12 shows the large majority of participants were satisfied with all program measures installed, indicated by the majority of participant customers providing a rating of 4 or 5 for the installation of ENERGY STAR windows (93%), insulation (96%) and programmable/high performance thermostats (88%). It should also be noted that over two-thirds of participants reported being "very satisfied" for all the program measures installed.

Figure 4-12: Satisfaction with Program Measure Installed



**May not sum to total due to rounding.*

Participating survey respondents who said they were dissatisfied (i.e., provided a rating of 1, 2 or 3) with the program measure(s) they had installed were asked why they were dissatisfied. Table 4-1 shows that most complaints had to do with the programmable/high performance thermostats being deemed expensive to purchase, even with the program rebate.

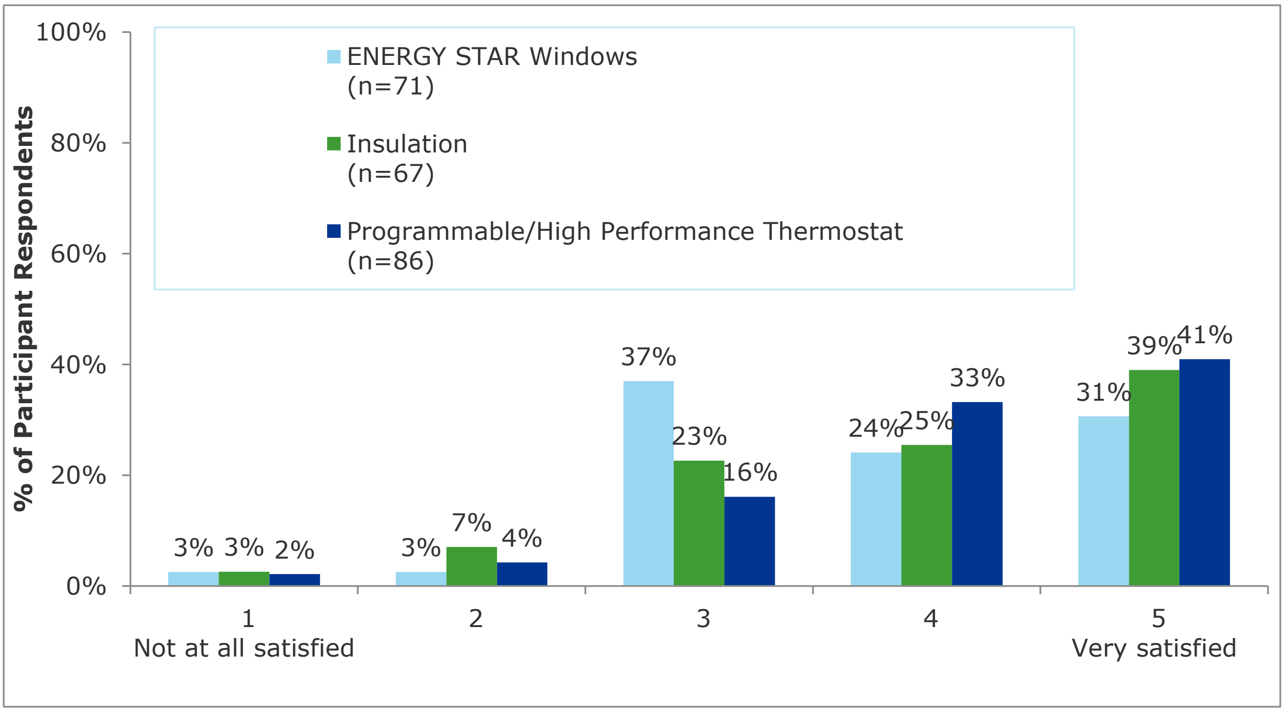
Table 4-1: Reasons for Being Dissatisfied with Program Measure Installed

(More than one response allowed)

Program Measure	Reason for Dissatisfaction	# of Times Reason Stated
ENERGY STAR WINDOWS	Had issue with window leaking	2
	Window(s) hard to open/shut	1
	Other	2
Insulation	The area was over insulated	1
	Other	1
Programmable/ High Performance Thermostats	Desire for better rebate	15
	This equipment was expensive	2
	Had to contact utility to remind them of rebate	1
	Other	2

Participating survey respondents having one or more program measures installed were asked about their satisfaction with the rebate amount offered by the *takeCHARGE* program. Figure 4-13 shows that while the majority of participants expressed being satisfied, a noticeable number report dissatisfaction with the amount of rebate offered by the program, ranging from 22% for programmable/high performance thermostats to 43% for ENERGY STAR windows. The only significant difference found between participant ratings by location (i.e., Avalon, Rest of island and Labrador) for program measures was for insulation. Participants in Labrador were significantly more likely to be satisfied with the rebate amount for insulation compared to Avalon and the rest of island. However it is important to keep in mind that a low number of participants from Labrador (n=2) responded to the survey.

Figure 4-13: Satisfaction with Rebate Amount



**May not sum to total due to rounding.*

Participating survey respondents who indicated they were dissatisfied with the amount of the program rebate were asked why they were displeased. Table 4-2 shows that most complaints had to do with a desire for higher rebate amount for ENERGY STAR windows and insulation.

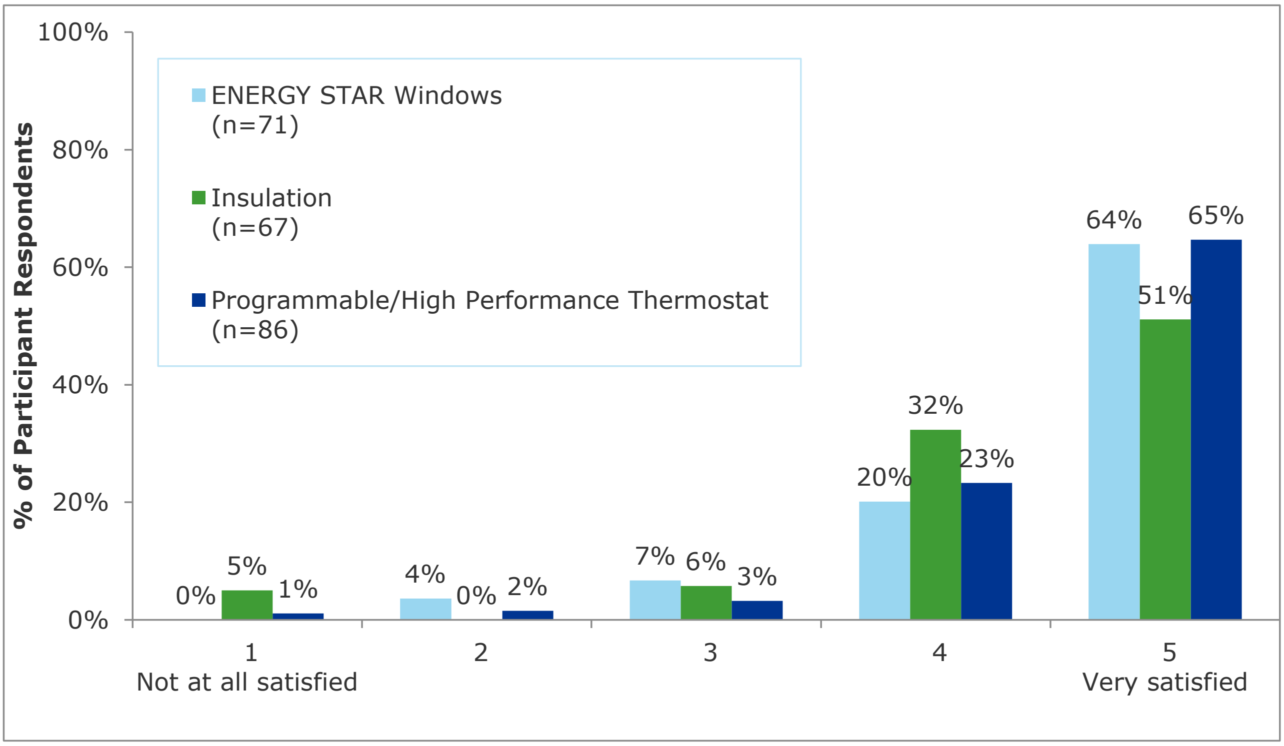
Table 4-2: Reasons for Being Dissatisfied with Rebate Amount

(More than one response allowed)

Program Measure	Reason for Dissatisfaction	# of Times Reason Stated
ENERGY STAR WINDOWS	Desire for better rebate	29
	Window(s) expensive to replace	1
	Never received rebate	1
Insulation	Desire for better rebate	13
	Did not meet deadline to receive rebate	1
	Not aware of program until after selecting insulation	1
	Other	6
Programmable/ High Performance Thermostats	Took too long to receive rebate	3
	Other	2

Participating survey respondents having one or more program measures installed were asked about their satisfaction regarding the timeliness of the rebate payment. Figure 4-14 shows the large majority of participants were satisfied with amount of time it took to receive the rebate, indicated by the majority of survey respondents providing a rating of 4 or 5 for the perceived timeliness it took to receive their rebate. It should also be noted that over half of participant customers reported being "very satisfied" for the length of time to receive their rebate across all three measure programs.

Figure 4-14: Satisfaction with Timeliness to Receive Rebate



****May not sum to total due to rounding.*

Participating survey respondents who indicated they were dissatisfied with the amount of time it took to receive their program rebate(s) were asked why they were unhappy. Table 4-3 shows that most feedback provided a general commentary regarding the desire to receive the rebates more quickly.

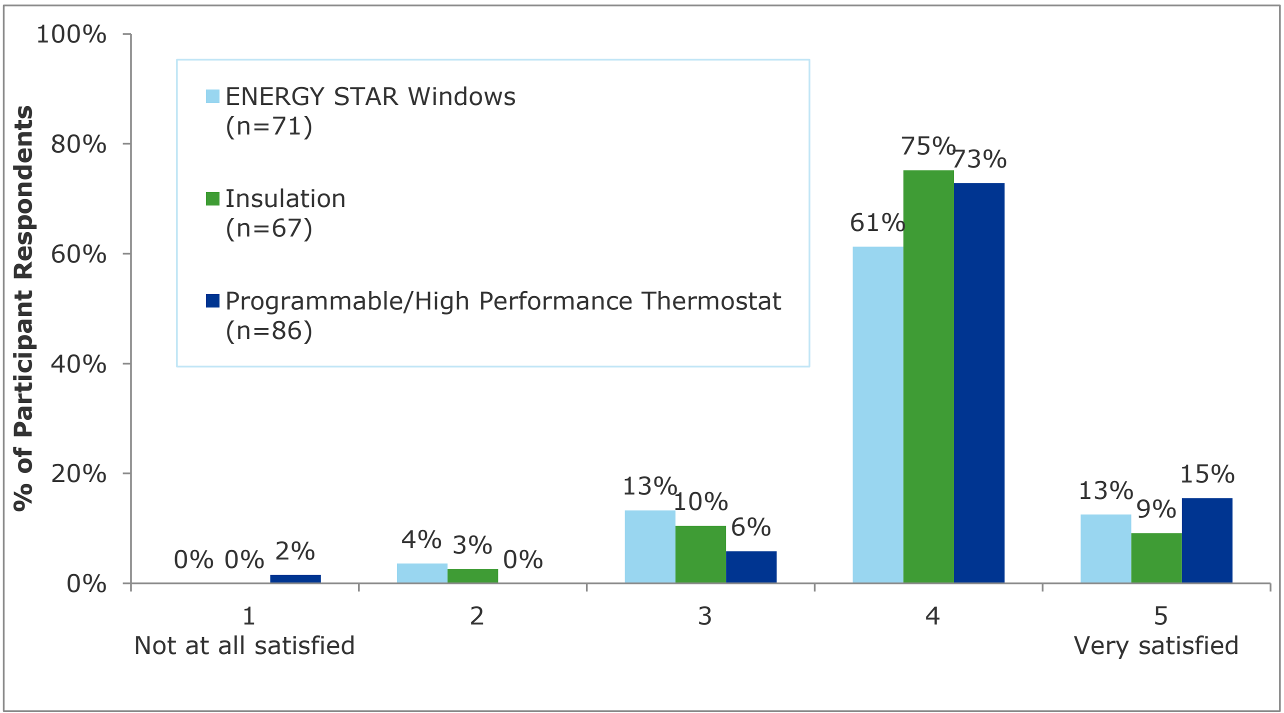
Table 4-3: Reasons for Being Dissatisfied with Timeliness to Receive Rebate

(More than one response allowed)

Program Measure	Reason for Dissatisfaction	# of Times Reason Stated
ENERGY STAR Windows	Took too long to receive rebate	3
	Paperwork was too time consuming to fill out	2
	Other	1
Insulation	Took too long to receive rebate	6
Programmable/ High Performance Thermostats	Paperwork was too time consuming to fill out	2
	Desire for online application	2
	Other	1

Participating survey respondents having one or more program measures installed were asked about their satisfaction with the application forms and other paperwork associated with the rebate. Figure 4-15 shows that most participants did not have a negative experience generating the paperwork required to receive the rebate for the ENERGY STAR window, insulation and programmable/high performance thermostats thermostat programs.

Figure 4-15: Satisfaction with Rebate Application Form/Paperwork



**May not sum to total due to rounding.*

Participating survey respondents who indicated they were dissatisfied with their experience with the rebate application form/paperwork were asked the reason(s) for being displeased. Table 4-4 shows that for ENERGY STAR windows and insulation that most comments had to do with the application/paperwork being overly cumbersome and complicated to complete.

It is interesting to note that in addition to providing feedback on the rebate application, a number of participating survey respondents (n=7) replied to this question by noting they were challenged working with their new thermostats for reasons that include:

- "Not sure if I have the thermostat set up right."
- "Do not find the thermostat very easy to program or make changes."
- "Very difficult to adjust the thermometers – the booklet does not give enough information and I had to call someone for help to set up the thermostat."
- "The heat output does not seem to match thermometer setting."

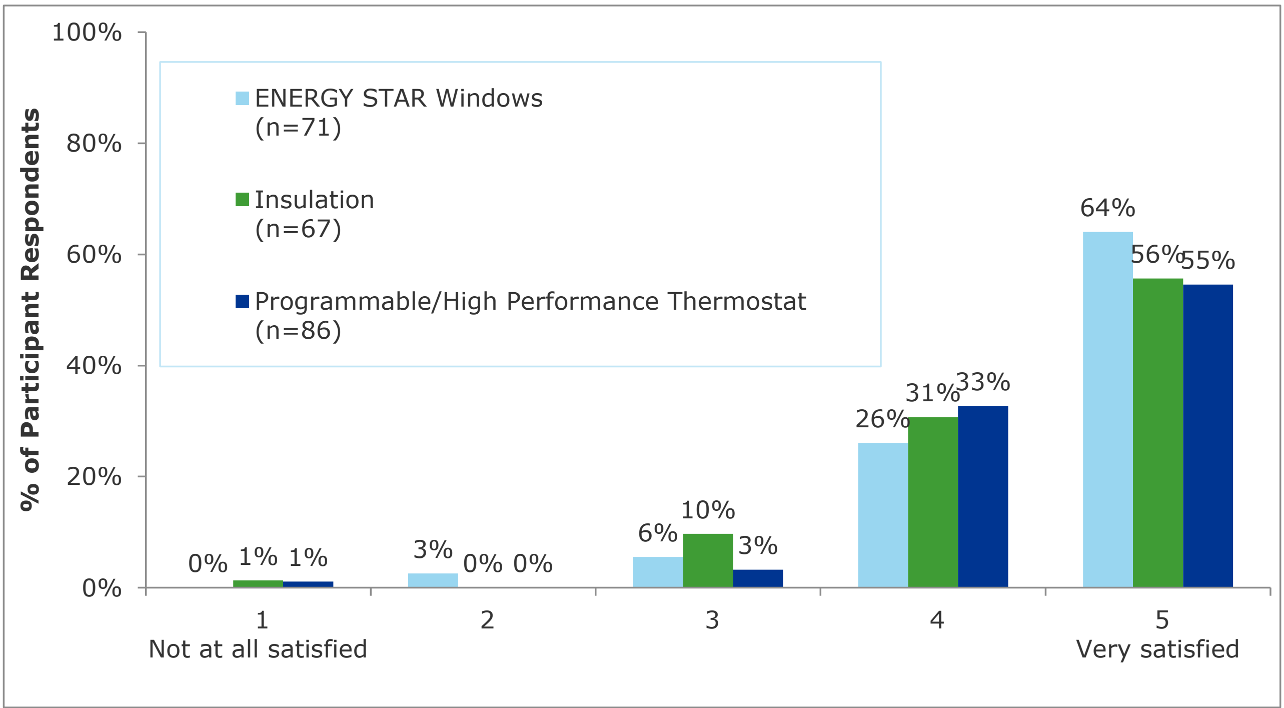
Table 4-4: Reasons for Being Dissatisfied with Rebate Application Form/Paperwork

(More than one response allowed)

Program Measure	Reason for Dissatisfaction	# of Times Reason Stated
ENERGY STAR WINDOWS	Paperwork was too time consuming to fill out	3
	Paperwork was too complicated to fill out	2
	Desire for online application	2
	Contractor did not supply necessary paperwork	1
	Other	3
Insulation	Paperwork was too time consuming to fill out	1
	Paperwork was too complicated to fill out	1
	Frustrated that paperwork was sent back because deemed not filled out properly	1
	Other	5
Programmable/ High Performance Thermostats	Having difficulty working with new thermostat(s)	7
	Paperwork was too complicated to fill out	3
	Other	2

Participating survey respondents having one or more program measures installed were asked about their satisfaction with the contractor or retailer they contacted. Figure 4-16 shows the large majority of participants were pleased with the interaction they had with their contractor of retailer, indicated by the majority of survey respondents providing a satisfaction rating of 4 or 5. It should also be noted that over half of participant customers reported being "very satisfied" with their interactions with contractors/retailers across all three measure programs.

Figure 4-16: Satisfaction with Contractor/Retailer



**May not sum to total due to rounding.*

Participating survey respondents who indicated they were dissatisfied with their contractor/retailer were asked to indicate why they were dissatisfied. Table 4-5 shows customers who did not have a positive interaction with their contractor/retailer provide many different reasons for their discontent.

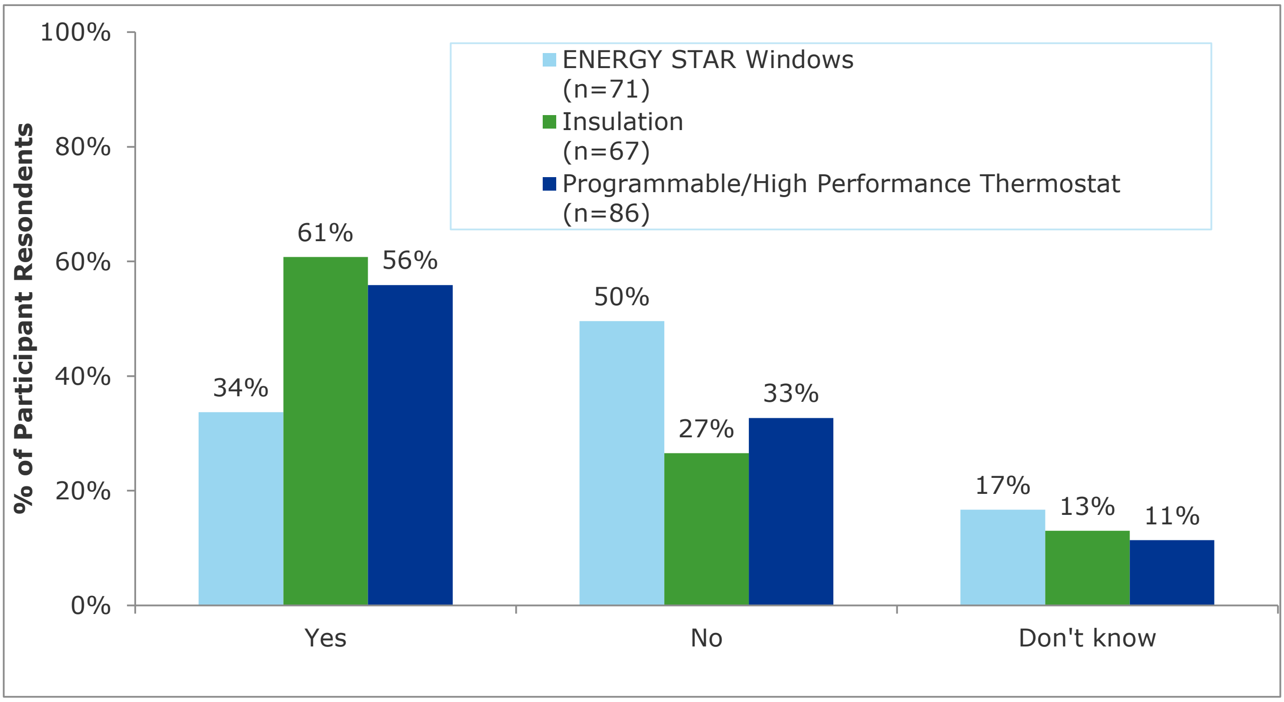
Table 4-5: Reasons for Being Dissatisfied with Contractor/Retailer

(More than one response allowed)

Program Measure	Reason for Dissatisfaction	# of Times Reason Stated
ENERGY STAR WINDOWS	Had to follow up regarding order	1
	Didn't do a good job installing windows	1
	Don't show up when supposed to	1
	Windows leaked after installation	1
	Windows found to have defects	1
	Other	2
Insulation	Didn't receive adequate help	2
	Order was lost	1
	Did not invoice properly	1
	Other	4
Programmable/ High Performance Thermostats	Had to engage in a number of callbacks	1
	Didn't receive adequate help	1
	Other	2

Participating survey respondents having one or more program measures installed were asked if they noticed a reduction in their energy bill after installing a program measure(s). Figure 4-17 shows while the majority of participants noted a decrease in their bill after having insulation (61%) or programmable/high performance thermostats (56%) installed; only about a third of participant customers (34%) who installed ENERGY STAR windows reported a decrease in their energy bill. It is interesting to note that over ten percent of participants were not able distinguish a change in their bill for all three program measures, with almost one in five customers (17%) not knowing if there was a change in their energy bill after having ENERGY STAR windows installed.

Figure 4-17: Noticeable Reduction in Energy Bill



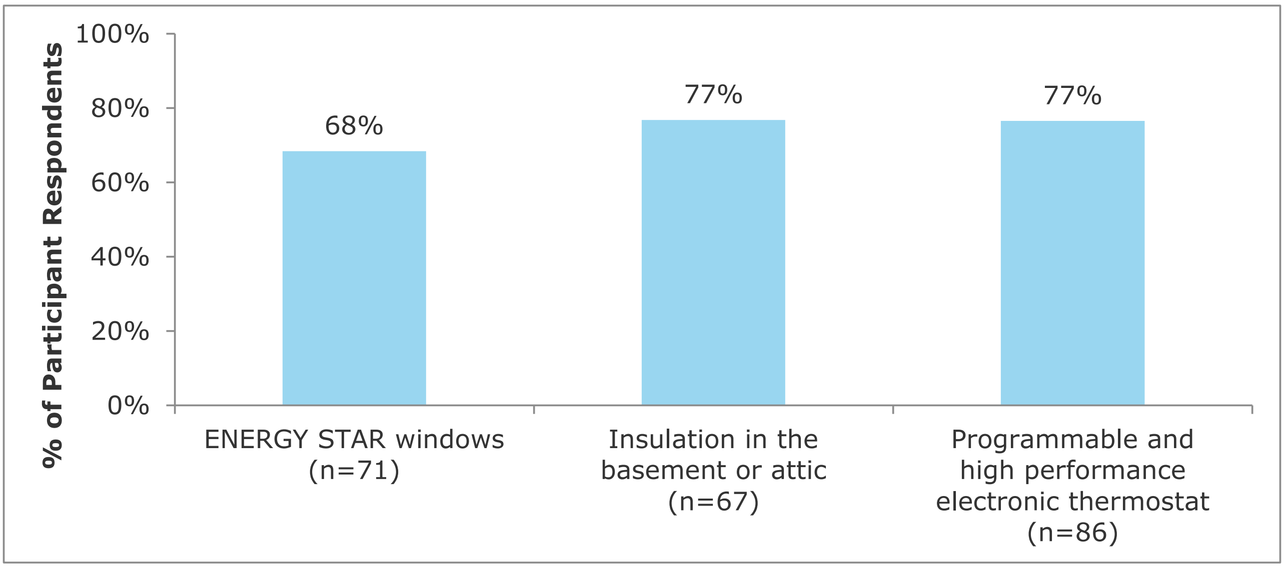
****May not sum to total due to rounding.*

4.4 Program Awareness

4.4.1 PARTICIPANTS

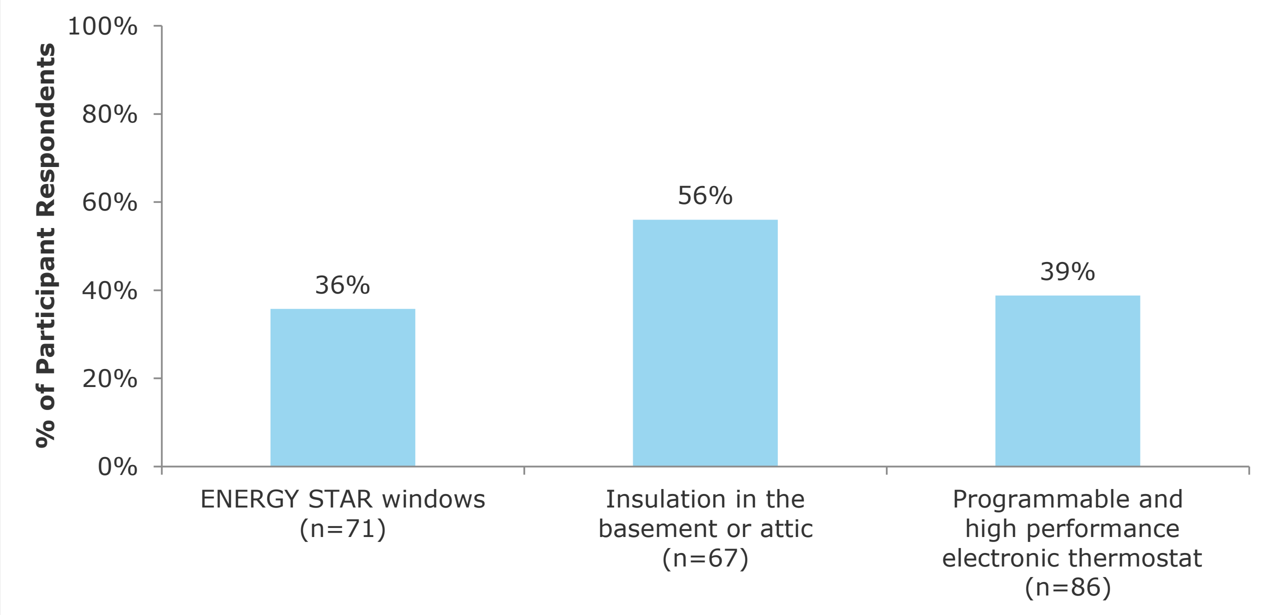
Participating survey respondents having one or more program measures installed were asked if they were aware of the *takeCHARGE* rebates before they contacted their contractor or retailer about purchasing and installing program measure(s). Figure 4-18 shows that most participants were aware of the *takeCHARGE* rebates before reaching out to their contractor or retailer for each of the measures offered by the program. This is indicated by over two-thirds of participants (68%) reporting being aware of the ENERGY STAR window rebates and over three-quarters (77%) being aware of the insulation and programmable/high performance thermostat rebates before talking with their contractor or retailer.

Figure 4-18: Awareness of *takeCHARGE* Rebates before Contacting Contractor/Retailer



Participating survey respondents having one or more program measures installed were asked if they had a type of measure in mind before speaking with their contractor/retailer. Figure 4-19 shows that while over half of participants (56%) having insulation installed had a type of insulation in mind, only a little over third of participants had a type of ENERGY STAR window (36%) or programmable/high performance thermostat (39%) in mind before talking with their contractor/retailer.

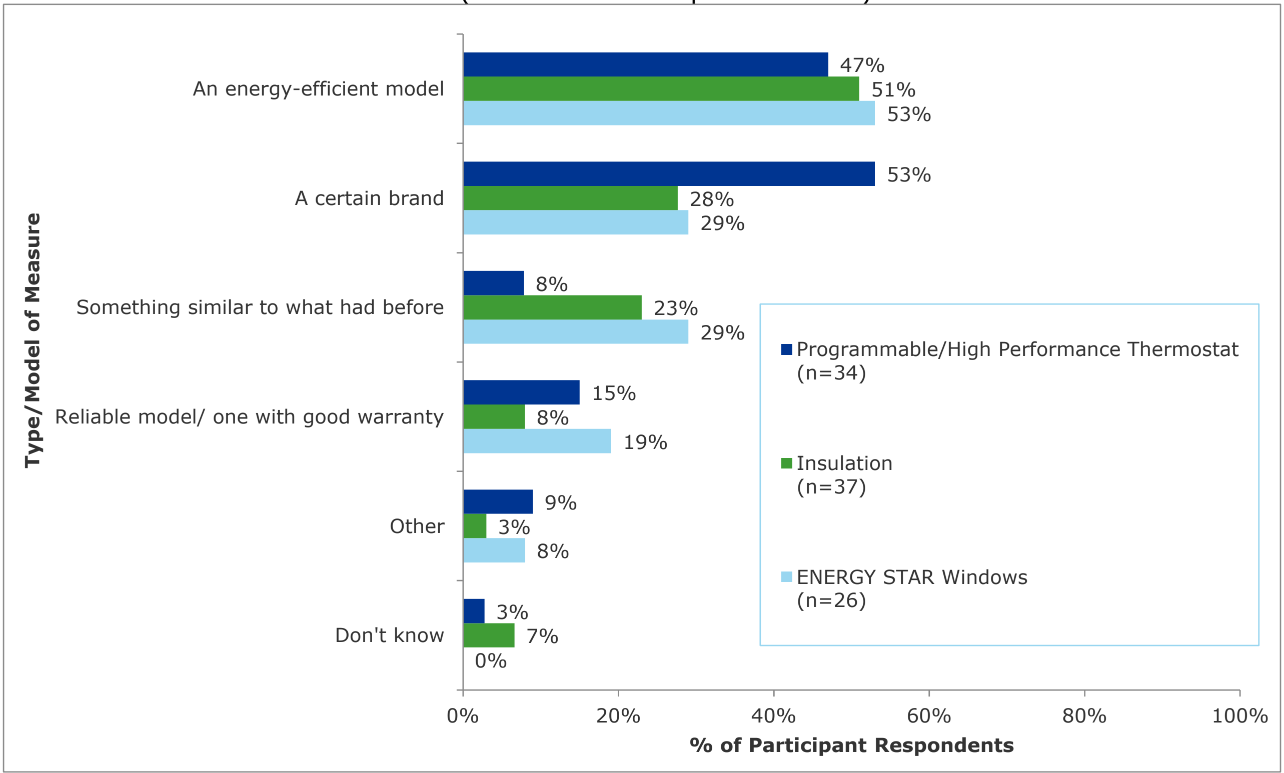
Figure 4-19: Any Type of Program Measure in Mind before Contacting Contractor/Retailer



Participating survey respondents indicating having a type of program measure in mind before meeting with a contractor/retailer were asked to describe the type of measure they wanted to purchase. Figure 4-20 shows the most prevalent features of program measures that participants desired included being an energy efficiency model, having a particular brand name, obtaining something similar to what is currently installed and possessing a measure with a strong warranty/reliability.

Figure 4-20: Type of Program Measure in Mind before Contacting Contractor/Retailer

(More than one response allowed)

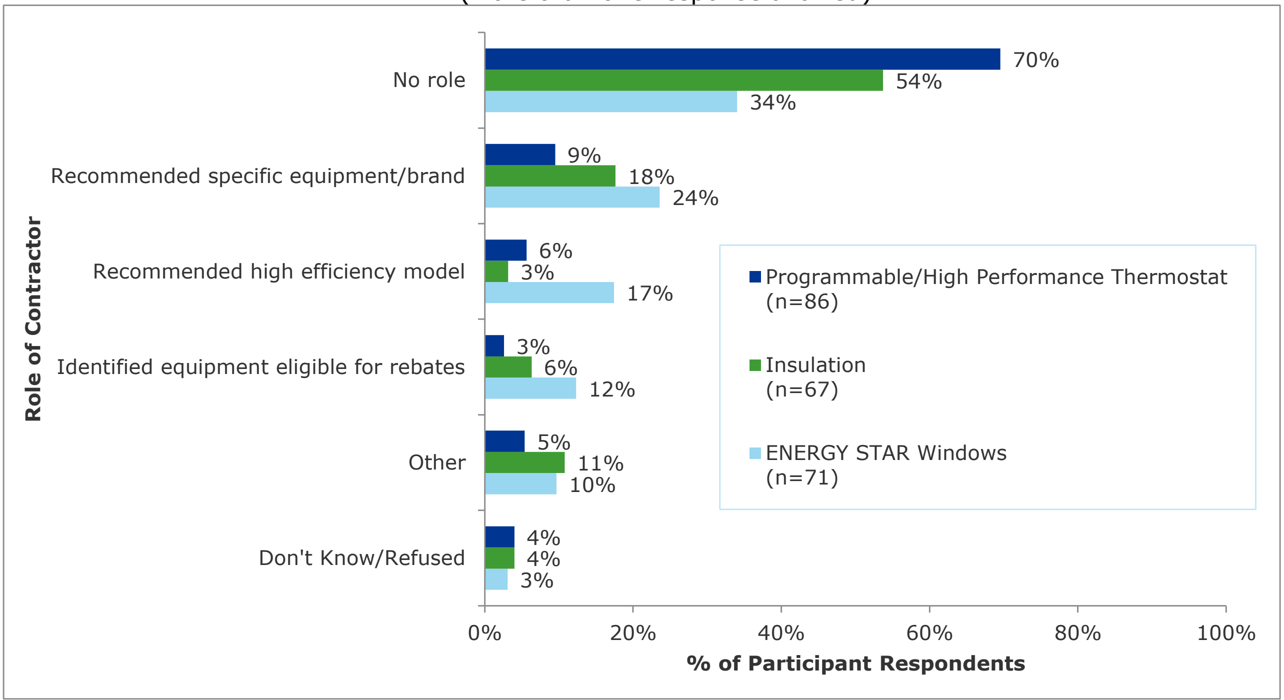


**May not sum to total due to rounding.*

Participating survey respondents having one or more program measures installed were asked to describe the role their contractor/retailer played in selecting a program measure(s). Figure 4-21 shows that while many times across all three program measures that a contractor/retailer did not play in role in selecting equipment, a noticeable amount of customers were receptive hearing about equipment brands and high efficiency models recommended by their contractor/retailer and equipment identified as being eligible for rebates.

Figure 4-21: Role of Contractor/Retailer in Selecting Program Measure*

(More than one response allowed)



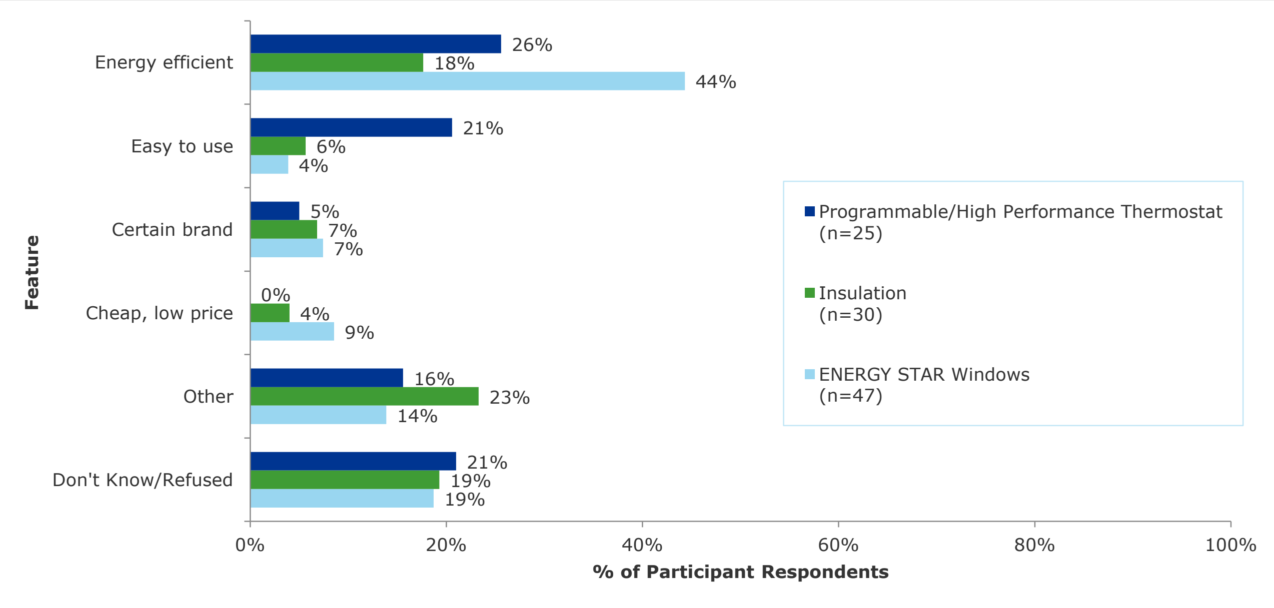
**To a lesser extent, additional advice provided by contractors/retailers include: Provided info about comfort level; Encouraged to replace measure; Helped estimate return-on-investment (ROI) or payback; Helped estimate energy savings; Informed us about takeCHARGE program; provided info about reliability of different windows; and provided cost estimates/bids.*

***May not sum to total due to rounding.*

Participating survey respondents indicating having a contactor/retailer who played a role in their purchase of the program measure(s) were asked what features were emphasized. Figure 4-22 shows that energy efficiency is the most cited feature across all three program measures.

Figure 4-22: Program Measure Features Emphasized by Contractor/Retailer*

(More than one response allowed)

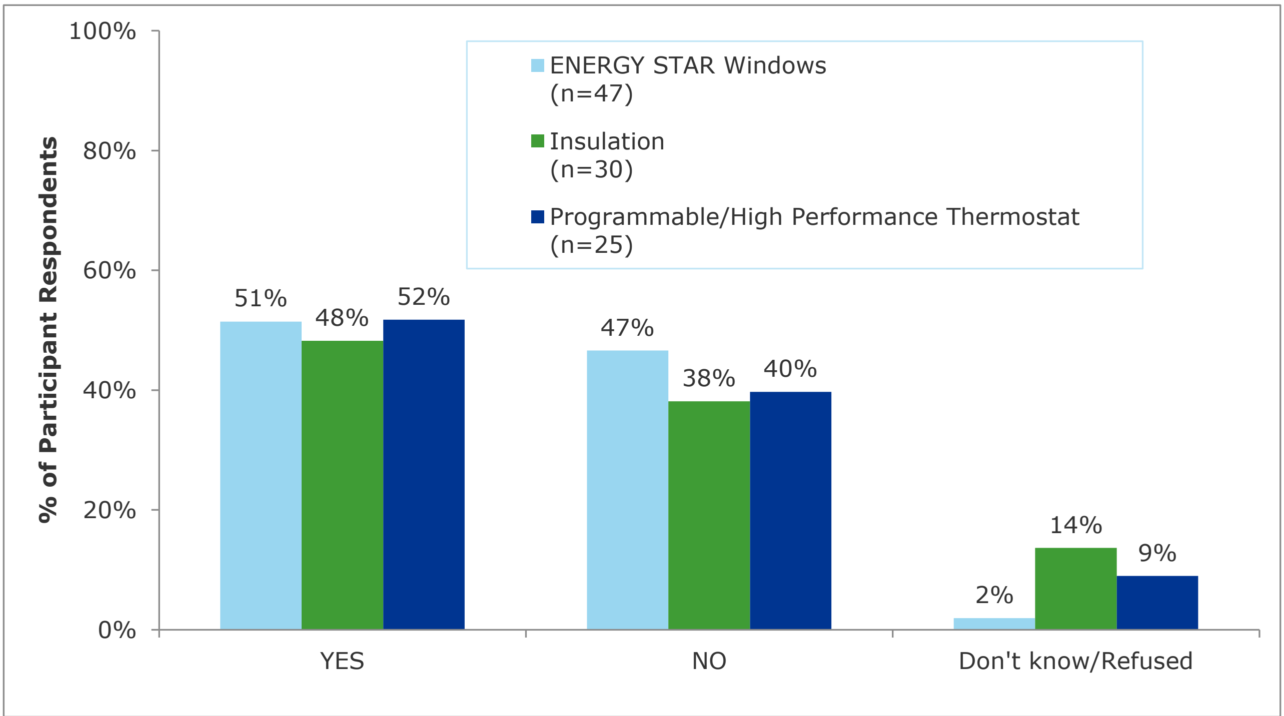


**To a lesser extent, features of program measures emphasized by contractors/retailers include: Equipment being endorsed by utility; Equipment being quiet; and Equipment having strong warranty/reliability.*

***May not sum to total due to rounding.*

Participating survey respondents indicating having a contactor/retailer who played a role in their purchase of the program measure(s) were asked if the contractor/retailer presented them with different models to choose from. For all three program measures, Figure 4-23 shows participants report being presented with different models about half the time.

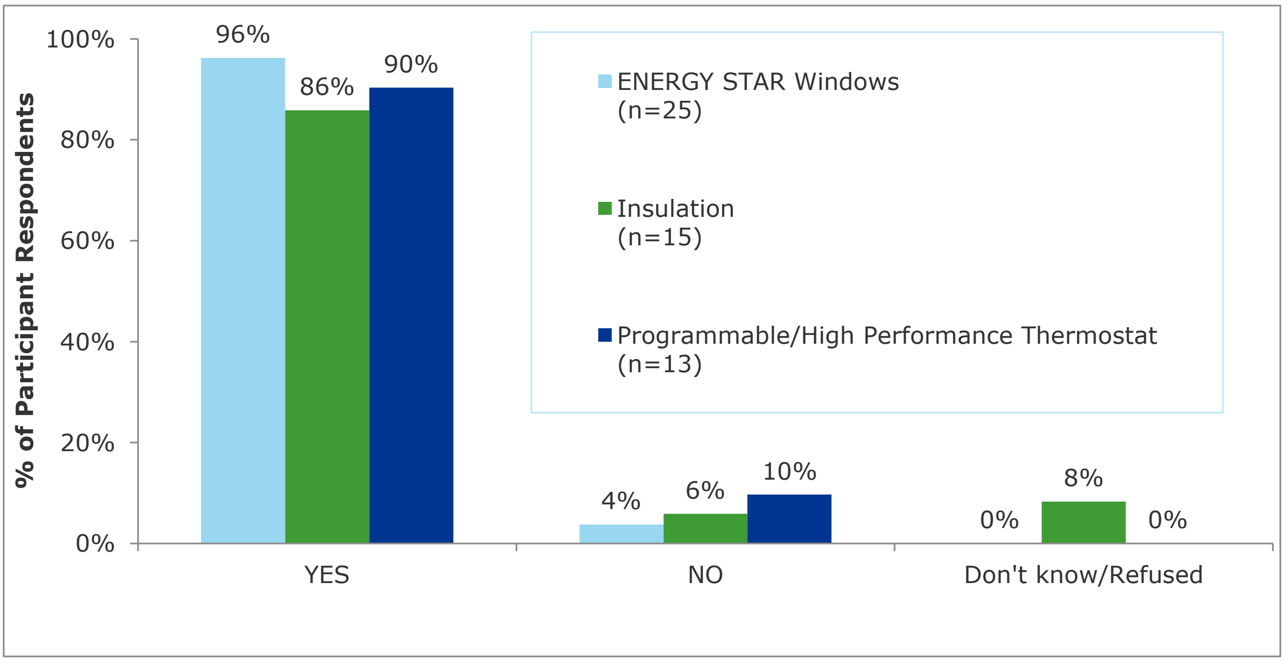
Figure 4-23: Did Contractor/Retailer Present Different Models?



**May not sum to total due to rounding.*

Participating survey respondents indicating having a contactor/retailer presented them with different models were asked if the contactor/retailer provided them with price quotes for the program measures. Figure 4-24 shows that most participants report being presented with pricing for all three program measures.

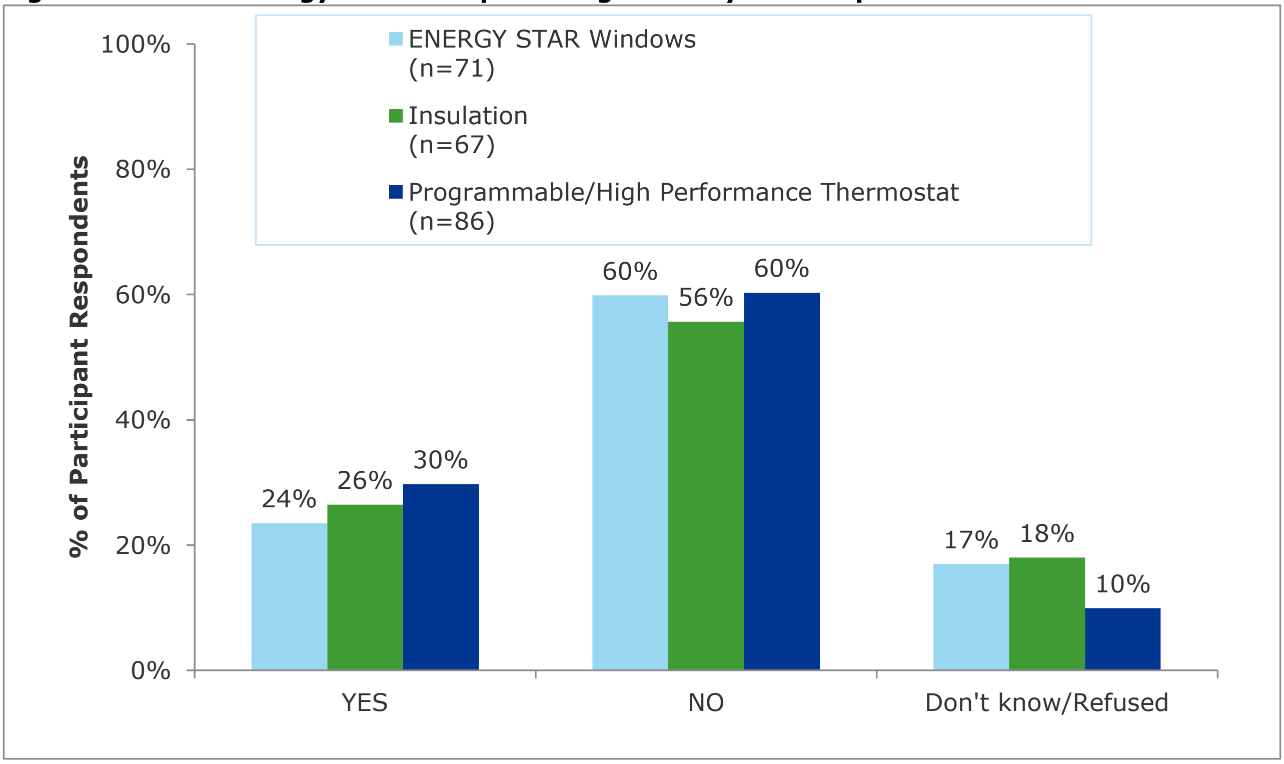
Figure 4-24: Did Contractor/Retailer Present Price Quotes?



**May not sum to total due to rounding.*

Participating survey respondents having one or more program measures installed were asked if they believed that energy efficient measures offered by the program were noticeably more expensive than alternative measures they could have purchased. For all three program measures, Figure 4-25 shows that around twice as many participants did not think the equipment was significantly more costly than alternative measures.

Figure 4-25: Are Energy Efficient Options Significantly More Expensive than Alternatives

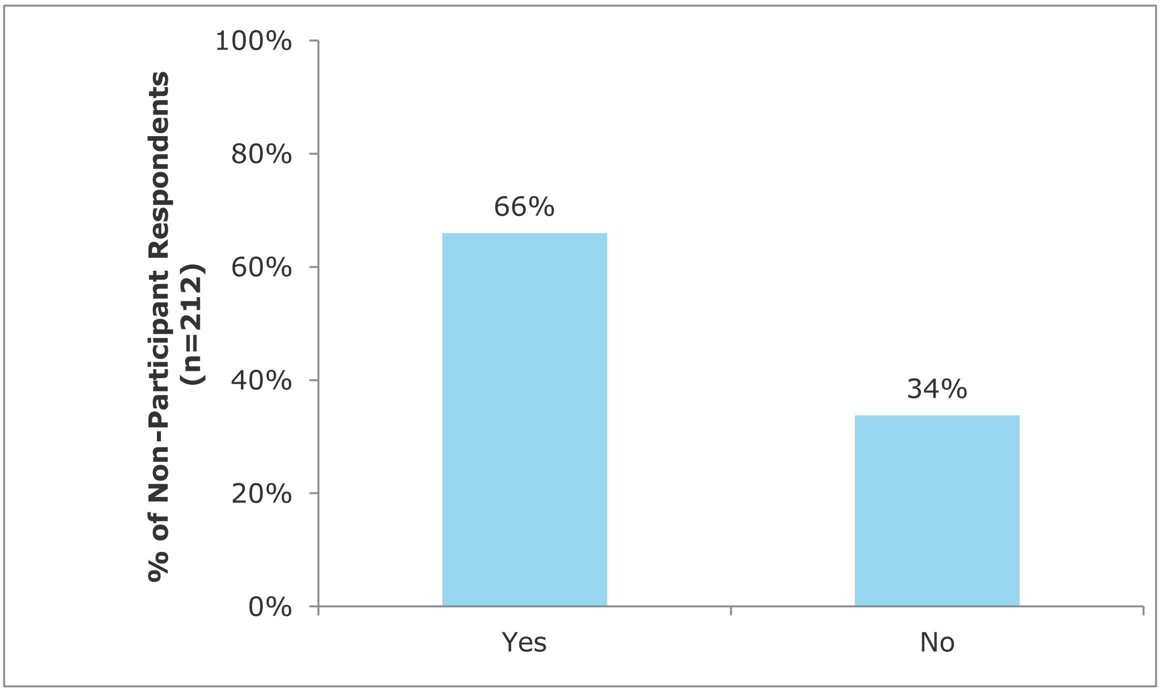


**May not sum to total due to rounding.*

4.4.2 NON- PARTICIPANTS

Survey respondents who did not participate in the *takeCHARGE* program were asked if they were aware of the rebate program. Figure 4-26 shows that about two-thirds of non-participants were aware of the *takeCHARGE* program.

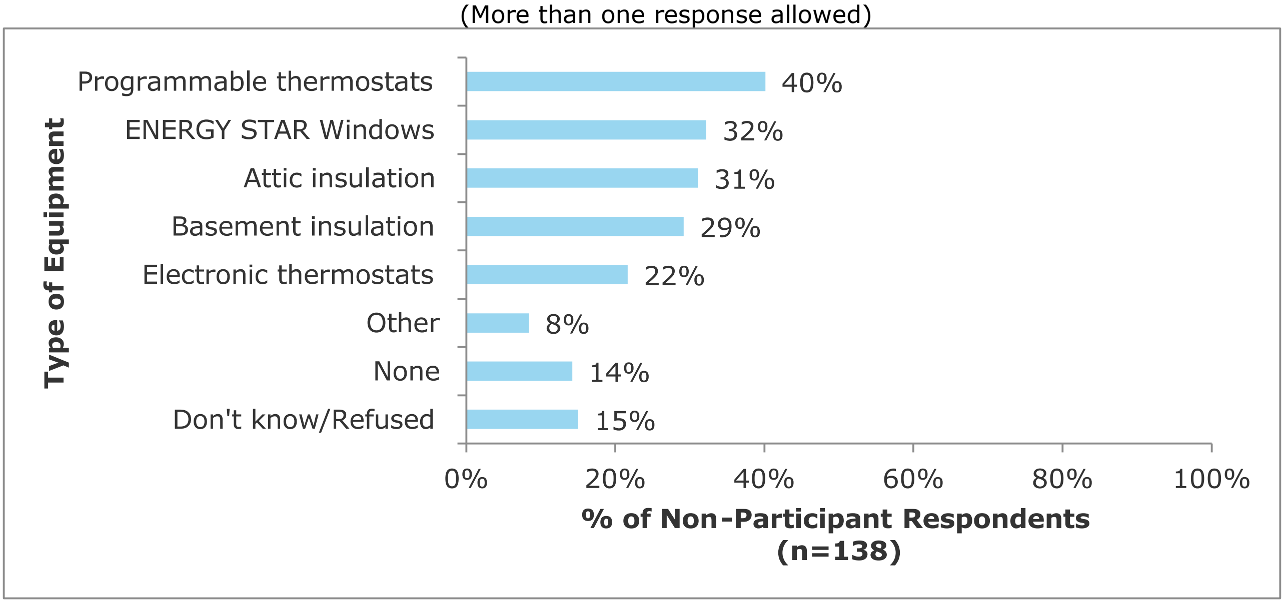
Figure 4-26: Awareness of Newfoundland Power and Hydro's *takeCHARGE* Programs



Non-participant survey respondents who indicated being aware of the *takeCHARGE* program were asked what type of equipment rebates or energy related services the program offered. Figure 4-27 shows that about a third of non-participants indicating program familiarity were knowledgeable the *takeCHARGE* program included (programmable) thermostats (40%), ENERGY STAR Windows (32%), attic insulation (31%) and basement insulation (29%).

Figure 4-27: Types of Equipment *takeCHARGE* Program Offers

(More than one response allowed)



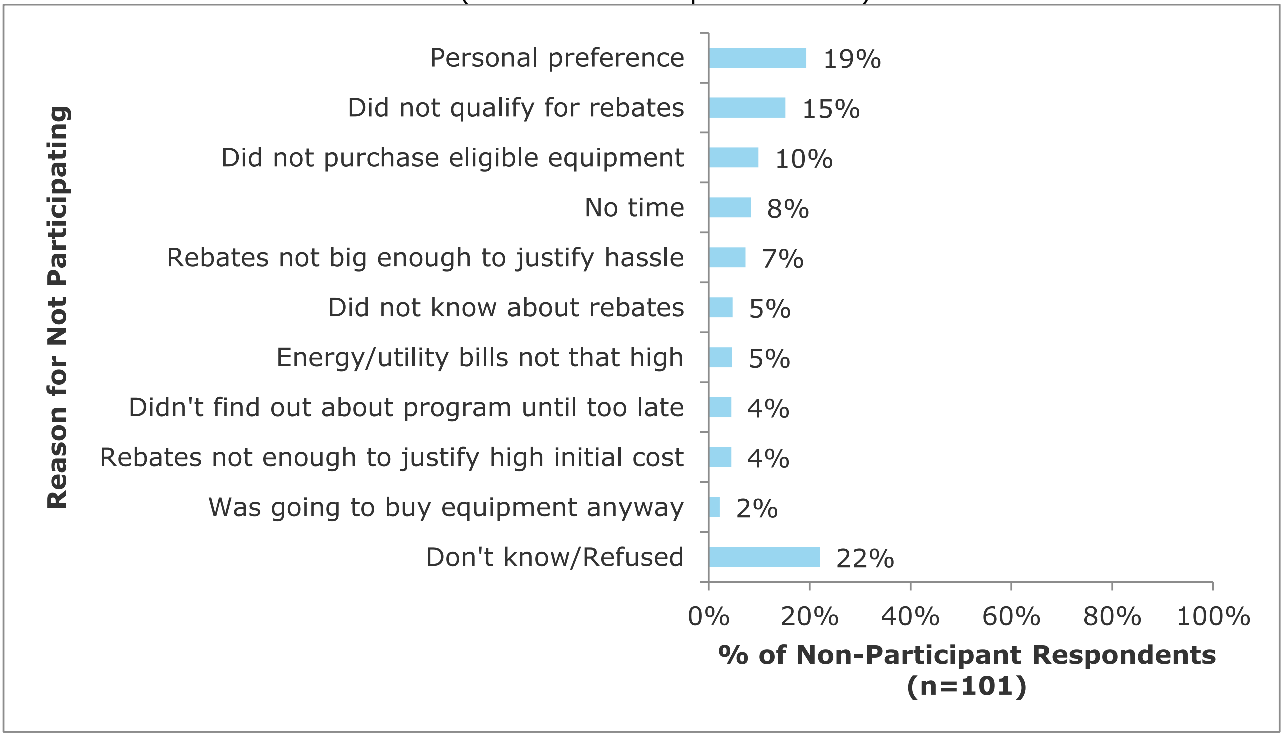
Non-participant survey respondents who identified awareness of at least one of the measures related to the *takeCHARGE* program were asked why they did not participate in the program. Figure 4-28 shows that non-participants provided many reasons for not making use of the program, with the most prevalent being 1) a personal preference for not participating; 2) buying equipment that did not qualify for program rebates (e.g., partial to a brand/manufacturer that was not offered rebate by the program);

and/or 3) purchasing equipment that was not eligible for the program rebate (e.g., buying program measure that was not considered to be energy efficient by the program).

Respondents may have cited personal preference for a variety of reasons. For example, some respondents do not mind paying full price and have no desire to take advantage of the rebates. Respondents may have state personal preference because "no time," the "rebates not big enough to justify the hassle" of pursuing, and/or "was going to buy the equipment anyway." The Utilities may wish to probe further on the reasons underlying the personal preference responses in future research activities.

Figure 4-28: Reasons for Not Participating in *takeCHARGE* Programs

(More than one response allowed)



5 PROGRAM PARTNERS

5.1 Contractor Surveys

The DNV GL team conducted interviews with participating and non-participating contractors in Newfoundland and Labrador. Table 5-1 shows the type of contractors that were interviewed. Among the participating contractors, nine contractors were from Avalon and the remaining five were from Rest of Island and Labrador. For non-participant contractors, six were from Avalon and six were from Rest of Island and Labrador. Given the relatively small sample sizes, the survey findings for Rest of Island and Labrador respondents are reported together. It is also important to note that the small sample sizes are not statistically significant but rather provide qualitative insight into the performance of the programs, market trends and customer behavior.

Table 5-1: Profile Contractors Survey Respondents

	***takeCHARGE* Participants**	**Non-Participants**	**TOTAL**
General Contractor-New Construction Only	10	3	13
General Contractor-New Construction and Remodelling	4	5	9
General Contractor-Remodeling Only	0	2	2
Specialised Contractor	0	2	2
TOTAL	14	12	26

5.1.1 Program Awareness and Design

5.1.1.1 Awareness and Understanding of the *takeCHARGE* Programs

The level of understanding of the mechanics of the programs differed among participants. Most participants have a good understanding of the programs; know where to look for additional information when needed and how to keep up-to-date with the programs' changes. A few participant contractors are less aware of the programs changes and expect the utilities to promptly inform them about any modification (rebates, new measures, deadlines etc.). These findings were consistent for both Avalon and Rest of Island/Labrador contractors.

Among the non-participants in both Avalon and Rest of Island/Labrador, very few were aware of the programs (25%) and the majority of those stayed abreast of the programs' offerings and do in fact, pass the information to their clients.

Most participants stated that the advertisement of the *takeCHARGE* programs was appropriate and very useful. Radio, TV and the internet were cited as the most frequent ways for learning about the program, followed by pamphlets, flyers and mailings. Presentations at the Home Builders Association were also mentioned as a very useful and effective way to increase participation to the programs:

"If you convince one builder to use the program you can get 50 houses but convincing each individual home owner with the TV ads takes a lot of work."

Other marketing suggestions and feedback from the builders included:

- Participating contractors particularly appreciate the opportunity of having a contact person at the utility to answer all their inquiries and support them with the programs' application.
- Add stickers to identify the program (similar to ENERGY STAR stickers for windows)
- Advertise in movie theatres citing the province's high movie attendance
- Include program materials when building approvals are issued

5.1.1.2 Assessment of How *takeCHARGE* Programs Meet Contractor Needs

Overall, contractors in general did not indicate a need in promoting the programs' measures to their clients. Most contractors promoted the use of energy efficient features in their work without mentioning the *takeCHARGE* programs to their clients (unless the customer asks). The two primary reasons for this response were either because the contractors applied for the rebate directly or because the contractor thought the program information was promoted by the real estate agencies. Contractors often used energy efficiency as a selling point but did not mention the program to their customers to avoid customers ask for a lower selling price on the house or for concerns that the customer may apply for the rebates directly. Some contractors mentioned the program and its rebates only if a customer rejects the proposed efficient measures.

It is important to note the contractors and builders who included energy efficiency as part of their standard offerings viewed the *takeCHARGE* programs as an easy way to recover some of their investments in energy efficiency features that they would have made without the program. It is important to note that the *takeCHARGE* programs are no longer offered to new construction customers due to the new more energy efficient building codes.

The contractors who offered energy efficient measures and promoted energy efficiency usually characterized their clients as aware and interested in energy efficiency, even if they were not aware of the *takeCHARGE* programs. While contractors believe the programs were well marketed, they could not state whether their clients' increased interest and/or awareness in energy efficiency was directly linked to the *takeCHARGE* programs.

According to participating contractors, customers' awareness of the programs can vary by location. The level of interest and awareness among the contractors' clients was higher in St John's and its greater area (Paradise, Mount Pearl and Conception Bay South):

a) 43% of the participating contractors indicated that 40-60% or more of their clients were aware of the *takeCHARGE* programs and ask about the programs. All of these contractors primarily work in St John's and its greater area.

b) 57% of the participating contractors indicated that clients were either unaware or did not ask about the program

These contrasting answers likely reflected the fact that a majority of interviewed contractors did not talk about the programs with their clients since they are directly applying for rebates, and did not see any reason to discuss the programs.

Some contractors would welcome a case study showing expected and achieved savings from the proposed measures and higher rebates, in particular for the more expensive (e.g. ENERGY STAR windows) or less popular (e.g. programmable thermostats) measures.

5.1.2 Program Outreach and Role of Energy Efficiency

Among participating contractors there are three distinct roles for energy efficiency:

a) Approximately 35% of all participating contractors did not promote energy efficiency. Furthermore, nearly all (4/5) contractors in the Rest of Island/Labrador geography chose not to promote energy efficiency measures to homeowners Promoting energy efficiency benefits in residential homes was handled separately by a real estate agency, or they were not interested or considered energy efficiency measures too expensive.
b) Nearly a third of participating contractors, with all but one contractor located in the Avalon region, adopted energy efficiency measures and building practices as part of the standard baseline project offerings and did not explicitly promote the energy efficiency products or the *takeCHARGE* programs.
c) The remaining third of participating contractors did actively use energy efficiency as a selling point and have integrated it into their marketing strategy.

The contractors that did not promote energy efficiency considered the business value of marketing efficiency, either because efficiency was already part of their business model, or because they did not believe their customers were interested. The type of house built and the clients' level of wealth played a relevant role:

a) For average starter homes, the level of energy efficiency measures and features was generally low, because the buyer was either not willing to pay the extra price when purchasing the house or the builder was not interested in energy efficiency;
b) For high-end luxury houses, buyers were willing and able to pay more at purchase. Even if energy efficiency measures are built as default, they were not included in the marketing since the buyers were more interested in other features, like kitchen cabinetry, top line appliances and hot tubs.

5.1.3 Contractor Barriers

Contractors cited two market barriers in the adoption of the type of measures offered in the *takeCHARGE* programs: cost and lack of interest. Measure cost, in particular for insulation and windows installation, was been cited as one of main barriers by 50% of the participant contractors, with no distinction between new construction and remodeling. Despite the rebates, some measures required an initial investment that many clients were not willing to make. Most contractors believe that higher rebates for these measures would lead to a much higher uptake. Many contractors believed that building an efficient home is the best choice, as it not only improves the comfort but also the energy and economic savings in the long term, but often it is not enough to convince their clients to invest in energy efficiency measures upfront One contractor suggested to drop sales tax (e.g. on the purchase of ES windows) as a possible solution to the cost barrier however, a change in sales tax is government decision and beyond the control of the Utilities.

The second market barrier cited was the lack of interest in energy efficiency and the lack of information about the program measures. Some contractors find it hard to provide relevant information regarding the energy savings of program measures to their clients. Contractors stated that having data to demonstrate the potential savings to clients would be useful.

Over 20% of the participating contractors did not see any barriers and that the *takeCHARGE* programs had adequately addressed the energy efficiency advantages for homeowners. These respondents were the same contractors, primarily located in the Avalon region, who believe in the value of energy efficiency and they adopted it in their business model. All of these contractors work predominately in the new construction segment.

5.1.4 Contractor Program Satisfaction

Across all regions, the majority of participating builders and constructors, 86%, were generally very satisfied with the *takeCHARGE* programs. Only 7% of the contractors report to be very dissatisfied.

Most of the contractors had positive interactions with the Utilities and were offered assistance in filling the forms. The contractors were satisfied with the rebate levels and would like to see the programs continue.

The negative feedback reported was regarding the amount of paperwork required to apply for a rebate and how it discouraged some homeowners from participating in the programs. Contractors stated that it was easier for them to track invoices and bills than for residential customers to sort through numerous invoices and receipts. Contractors also suggested that the paperwork burden could be streamlined if the option to apply online was available. In discussions with the Utilities' program staff, DNV GL has learned that this option is currently under development.

5.1.5 Market Characterization

As shown in Table 5-2, insulation measures were the most popular among participating contractors. All participants have installed basement and attic insulation meeting (or exceeding) the programs requirements in at least 60% of the new constructions built in 2012.

Table 5-2: Overview of Installed Features in 2009-2012 by Participant Respondent

	Participant Contractors by Geography													
FEATURES	Avalon	Avalon	Avalon	Avalon	Avalon	Avalon	Avalon	Avalon	Avalon	Rest of Island/ Labrador	Rest of Island/ Labrador	Rest of Island/ Labrador	Rest of Island/ Labrador	Rest of Island/ Labrador
Electric heat	100%	95%	95%	100%	100%	100%	90%	100%	100%	100%	100%	100%	100%	100%
Attic insulation (R32-R40)	100%	"buildin g code"	100%	100%	100%	100%	100%	100%	100%	100%	80%	100%	50%	100%
Basement insulation (R12-R20)	100%	100%	100%	100%	100%	100%	100%	100%	100%	60%	65%	100%	100%	100%
ENERGY STAR Windows	100%	100%	100%	100%	100%	100%	100%	100%	100%	18%	100%	0%	30%	100%
Programmable thermostats	100%	n/a	10%	100%	10%	100%	40%	100%	0%	4%	5%	100%	0%	n/a
Electronic thermostats	0%	n/a	90%	0%	90%	0%	60%	0%	100%	45%	20%	0%	30%	n/a

ENERGY STAR windows were installed by nearly 80% of the contractors, also quite common (11/14). However, three of the Rest of Island/Labrador contractors stated that ENERGY STAR windows comprised 30% or less of their window installation with one contractor stating no ENERGY STAR windows being installed. The installation of electronic and programmable thermostats was much less frequent (9/14 installed only non-traditional thermostats in the last 2 years) but it seems to be becoming a common practice in the new construction. The majority of these contractors were located in the Avalon region.

Insulation measures were also implemented by non-participants (see Table 5-3): attic insulation meeting or exceeding the program's requirements was installed by 75% of the interviewed contractors; the installations of ENERGY STAR windows and programmable and electronic thermostats were less frequent.

Table 5-3: Non-Participants contractors - Overview of Installed Features in 2012-2013

	NON-PARTICIPANT RESPONSES BY CONTRACTOR AND GEOGRAPHY											
Features	**Avalon**	**Avalon**	**Avalon**	**Avalon**	**Avalon**	**Avalon**	**Rest of Island/Labrador**	**Rest of Island/ Labrador**	**Rest of Island/ Labrador**	**Rest of Island/ Labrador**	**Rest of Island/ Labrador**	**Rest of Island/ Labrador**
Electric heat	50%	n/av	100%	90%	40%	80%	50%	100%	100%	100%	30%	100%
Attic insulation (R32-R40)	100%	100%	100%	100%	n/a	100%	n/a	100%	100%	100%	n/a	100%
Basement insulation (R12-R20)	100%	100%	100%	100%	n/a	100%	n/a	60%	100%	100%	n/a	n/av
ENERGY STAR Windows	75%	0%	100%	0%	n/a	10%	n/a	18%	n/a	100%	n/a	100%
Programmable thermostats	75%	0%	0%	0%	2%	0%	25%	4%	n/a	16%	50%	50%
Electronic thermostats	0%	0%	0%	0%	2%	0%	25%	45%	n/a	0%	50%	0%

n/a: not applicable

n/av: don’t know/don’t remember

5.1.5.1 Future Market Trends

Both participating and non-participating contractors expect the adoption of energy efficiency measures to continue in the future. Contractors identified a number of energy efficient products that will gain markets share in the coming years:

- Heat recovery ventilators (HRV)
- On-demand hot water systems.

Contractors and builders expressed their concern about the availability of rebates for some of the more expensive products and materials particularly insulation foams, heat pumps and HRVs.

5.1.5.2 Factors Attributable to Market Trends

Most participating contractors, roughly 90%, did not believe the recent changes to the market can be directly attributed to the *takeCHARGE* programs. Some participants reported that the change was due to their customers' demands for energy efficiency measures (in particular for insulation), though most participants believed that the real driver was the change in the building codes. In the St. John's area, the adoption of a new municipal code pushed builders and constructors to adopt not only the measures required by the new code, but in some cases to promote even higher energy efficiency standards to their clients.

Regarding the influence of the building codes in the adoption of energy efficiency measures, there were again two opposite perceptions: on one hand, those who thought new codes did not have any impact on the installation of the energy efficiency measures. The respondents were builders and contractors who had already implemented higher efficiency standards in their projects. On the other hand, those who believe the codes, in particular at the municipal level, had a vast influence in the adoption of energy efficiency measures.

When asked about the changes the programs brought to the residential retrofit and new construction markets, participants gave multiple answers:

a) A higher demand for energy efficiency homes and measures-in particular insulation, (5/14);
b) The increased interest and awareness among customers (3/14);
c) Better workmanship and awareness among constructors (3/14);
d) Only a few (3/14) think the programs made no difference.

However, half of the participating contractors (7/14) did not believe that the programs led to the changes in demand for energy efficiency measures or increased contractor activity. This finding was consistent in both the Avalon and Rest of Island/Labrador regions. However, slightly less than half of the contractors (6/14) thought the programs helped promote energy efficiency measures that would not otherwise have been installed, in particular with ENERGY STAR windows and programmable thermostats.

Considering also the fact that in some areas the change in the municipal building code drove the market towards the adoption of more efficient features, it is difficult to establish a clear cause-to-effect link between the *takeCHARGE* programs and their impacts on the market.

It is obvious that the level of awareness and the quality of the offering for participating contractors has positively changed over time, but those changes cannot be directly related to the programs. At times, it seems instead that the programs were considered as an additional bonus, in particular for the contractors that were already promoting energy efficiency.

Very few participants affirmed to have changed their business practices as a result of the programs (3/14).

5.1.5.3 Underserved Market Segments

When asked about underserved market segment most of the interviewed contractors cited heating losses in older homes. The homeowners in this sector were typically older residents on fixed incomes or low income customers that do not have money available for the upfront investments needed to add roof insulation.

Other recommendations included:

- Large residential and institutional buildings (e.g. schools, hospitals) that may have large potential savings and property managers who are more prone to investments with longer payback time.
- Other measures identified include heat pumps, boilers, and HRVs (HRVs are now offered in the *takeCHARGE* programs), appliances and lighting.

5.1.6 Other Key Findings

It seems that the marketing of *takeCHARGE* programs may not have reached builders and contractors across the Province and sectors equally. Whereas the large majority of participating contractors 86% was concentrated in St. John's and its greater area, the geographical location among non-participants was more diverse.

Similarly, the *takeCHARGE* programs did not have the same outreach and impact across sectors, since the vast majority of interviewed contractors work in new construction and some of the comments they provided highlight the limited impact the programs have in the remodelling sector.

5.1.7 Conclusions and Recommendations

Builders and constructors were generally very satisfied with the programs. Most of the contractors had positive interactions with the Utilities, were offered assistance in filling the forms if needed, found the rebate levels appropriate and would like to see the program continue. The negative remarks were from a single respondent and were linked to the amount of paperwork required to apply for a rebate. The Utilities have already taken actions to streamline the process and provide the opportunity to apply online.

The programs have been able to reach businesses of different size (from big companies, building dozens of houses per year, to very small contractors, only building two to three houses per year). Most of the interviewed contractors are general contractors. There are very few specialized contractors participating to the programs. The large majority of interviewed contractors are concentrated in the St. John's and its greater area.

The programs had a higher contractor participation in the new construction sector, whereas its outreach and impact in the remodelling sector appeared very limited, from the contractors' perspective. Given the pace of new construction in Newfoundland and Labrador, this was not a surprising result. The boom in the new construction market offers the Utilities opportunities to provide energy efficiency programs targeting this market segment. This is discussed in greater detail in Section 8 of this report.

The fact that participating contractors have incorporated the energy efficiency measures offered in the *takeCHARGE* programs as part of their baseline offerings raises some concerns regarding free-ridership and the real impact that the program had on energy savings. Some of the contractors clearly stated that the program is an easy way to recover some of the money they would have invested in energy efficiency features even if the *takeCHARGE* programs were not in place.

Considering that most home builders and contractors apply directly to the program and its limited success in the remodeling sector, customers' ability to participate to *takeCHARGE* appears to be limited. Utilities may need to reconsider their target audience, focusing on tailored marketing tools and facilitating the access to the program to their target audience. Currently, contractors specialized in remodeling do not seem to be reached by the program or to show interest in participating.

In terms of impacts on the market, the installation of better attic and basement insulation has considerably improved over time but it is very difficult to establish a clear cause-to-effect link with the *takeCHARGE* programs. Changes in the building code (in particular at the municipal level) and other factors (e.g. increasing heating costs) also contributed to these changes.

5.2 Retailer Surveys

This section summarizes interview results from a sample of Participating Retailers that work with the *takeCHARGE* program: 31 participating retailers and five non-participating retailers. Of the participating retailers, 10 were located in Avalon, 22 were from the Rest of Island and one from Labrador. The non-participating retailers were located in Avalon (3 respondents) and one each in Labrador and Rest of Island. Given the small sample size limited our ability to generalize the results to the retailer population. Therefore, the results were not weighted up to the retailer population. Also, since there was a single respondent from Labrador, the Labrador and Rest of Island responses were reported together where relevant.

We also completed surveys with a small sampling of non-participant retailers (n=5) and are reporting those results when germane to each subsection. Because of the difficulty of obtaining the cooperation of non-participant retailers, we report results from this group directly as a single, un-weighted group – not broken out by utility or geography.

The DNV GL team conducted in-depth and quantitative interviews participating and non-participating retailers in Newfoundland Power and Hydro's service territories. While the Utilities provided the DNV GL team with the list of participating retailers, the non-participant retailer sample frame was developed based on publically available lists of retailers located in Newfoundland and Labrador.

A total of 38 retailer in-depth interviews were completed across the Utilities. Table 5-4 shows the breakout of completed interviews by participant type and company, and also highlights the response rate for each breakout group. The response rate for all participating retailers was 22% overall and for non-participants was 3%.

Table 5-4: Retailer Interview Completes

Sampling Metric	Total	Participants		
		Avalon	Rest of Island	Labrador
Sample Frame	**218**	120	78	20
Eligibility Rate	**98%**	95%	100%	100%
Eligible Population	**214**	114	78	20
Respondents	**31**	8	22	1
Response Rate	**56%**	40%	85%	11%
Sample Weight For Each Respondent		14.2857	3.5455	20.0000

5.2.1 Characterization of Participating and Non-participating Retailers

The majority of participating retailer program partners were independent equipment retailers. This result was consistent for both Avalon and Rest of Island/Labrador (80% and 81%, respectively). A small number of the remaining retailers indicated they were part of a corporate store or chain, a franchise retailer, or wholesale retailer.

While a strong majority of participant retailers in both regions were independent equipment retailers, there were key differences in how survey respondents characterize the scope and scale of their businesses within this retailer characterization type. Some of the key differences are as follows:

- Avalon retailers had larger retailer businesses overall; the mean number of full-time employees was nearly 31. The mean number of full-time employees within a Labrador retailer businesses is 8.5.
- In both Avalon and Rest of Island/Labrador approximately 40% of participating retailers had more than one store. Among the retailers who had two or more stores, the mean number of stores was just over 3 stores.
- All but one participating retailers with multiple locations reported they have independent decision-making ability at the *store level*. Far fewer – about half – of Rest of Island retailers reported having similar decision-making authority.
- Rest of Island/Labrador retailers more frequently reported selling more measures types than Avalon stores; in fact, 70% of Rest of Island/Labrador retailers indicated they sell windows, insulation, **and** programmable thermostats, which may suggest that retailers had to “wear a lot of hats” in the inventory assortment they offered their customers. The remainder of the Rest of Island/Labrador sold either a one or a combination of the measures
- While lower than the Rest of Island/Labrador, the majority of participating retailers in Avalon, 60%, confirmed an in-store measure assortment that covers all three programs; another 20% reported they sold only one (programmable thermostats or windows) of the program measures. The remainder of Avalon retailers sold some combination of two measure options.

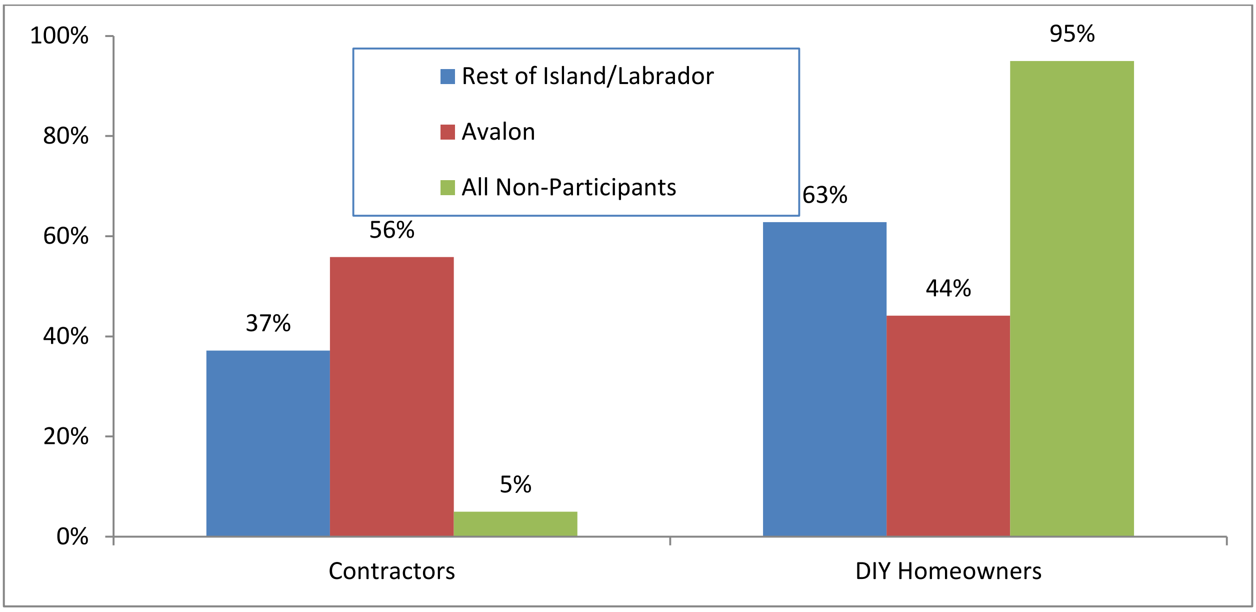
Non-participant retailers did have a slightly different profile than participating retailers. Non-participant retailers in were more likely to own just one or two stores, had a singular business focus (only 1 respondent sold all three measures), and had around 10 employees. Like participating retailers, a majority of our non-participant retailers categorized themselves as independent equipment retailers and make sales-related decisions at the store level.

We surveyed retailers to identify the customer segment to which they were selling each measure type to most frequently and also asked that they categorize the type of measure they were most often selling to gain a perspective about each retailer’s customer makeup and sales. We summarized their responses by measures in the sections that follow.

Retailers on Insulation Sales

In Rest of Island/Labrador 40% of respondents did not know if sales were made by Do-It-Yourself (DIY) homeowners or contractors. However, for those respondents who did know who were purchasing insulation, the sales were predominantly to DIY customers. Participating retailers reported that 63% of insulation sales are to DIY homeowners and 37% to contractors. In Avalon, 70% of the participating retailers could identify if DIY homeowners or contractors purchased insulation however, the split between DIY homeowners and contractors was split more evenly but with the majority of sales made by contractors, 56%. Non-participants reported selling almost all (95%) insulation to DIY homeowners and only 5 percent to contractors. Figure 5-1 summarizes insulation market share by customer segment.

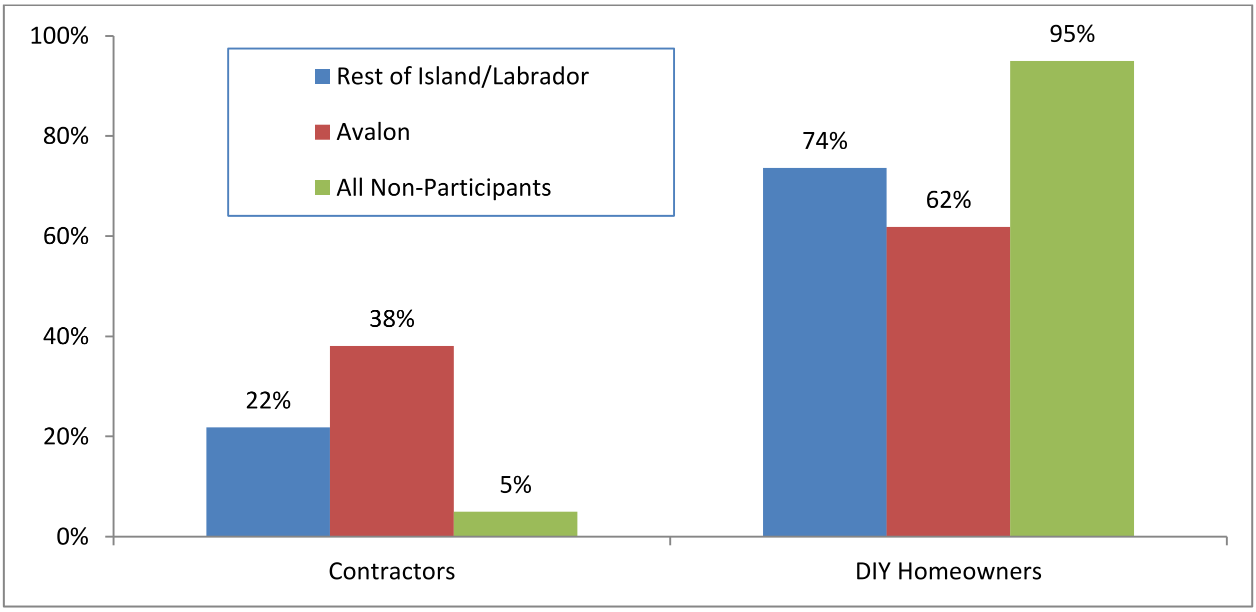
Figure 5-1: Insulation Market Share by Customer Segment



Retailers on ENERGY STAR Windows Sales

A majority of ENERGY STAR windows sales were directly to homeowners regardless of retailer type or region. Among program participating retailers, two-thirds (69%) of windows were sold directly to homeowners and 31% were sold to contractors. Breaking out window sales by region, 74% of sales were made directly to DIY homeowners in Rest of Island/Labrador and 62% of sales in Avalon. Non-participant retailers we surveyed indicated that nearly all window sales are direct to homeowners.

Figure 5-2: Window Sales by Customer Segment



Retailers on Thermostat Sales

Participating retailers sold roughly two thirds of thermostats to DIY homeowners and a third to contractors. DIY homeowner thermostat purchases were slightly more prevalent in Avalon than for participants in Rest of Island/Labrador. Similarly, non-participants reported having a little over twice as many (70%) sales to DIY homeowners than contractors (30%). Figure 5-3 breaks out retailer thermostat sales by customer segment.

Figure 5-3: Retailer Thermostat Sales by Customer Segment

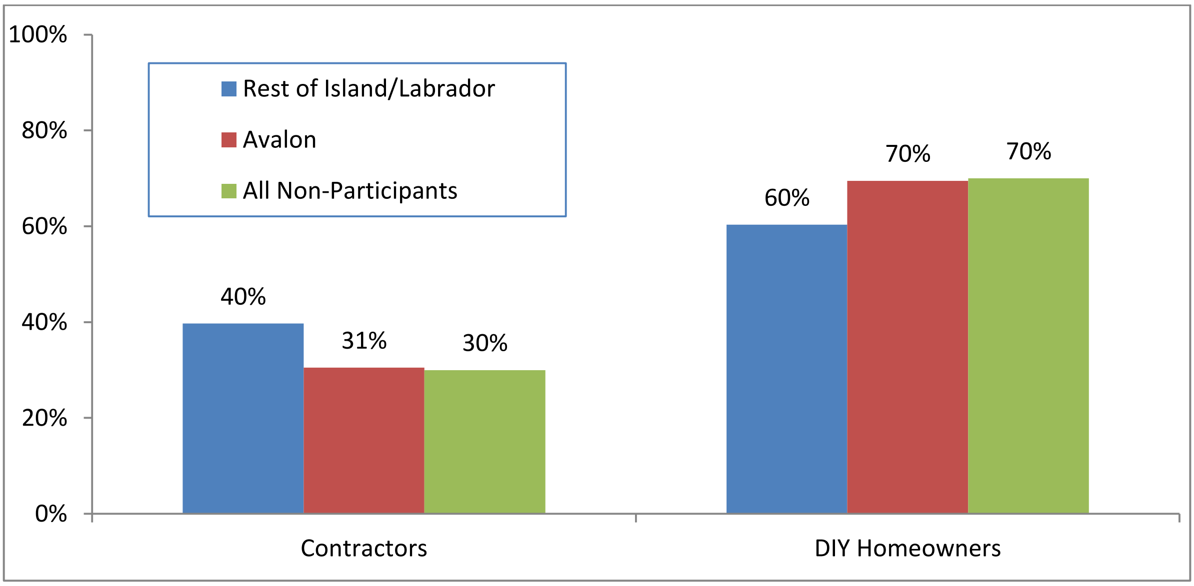
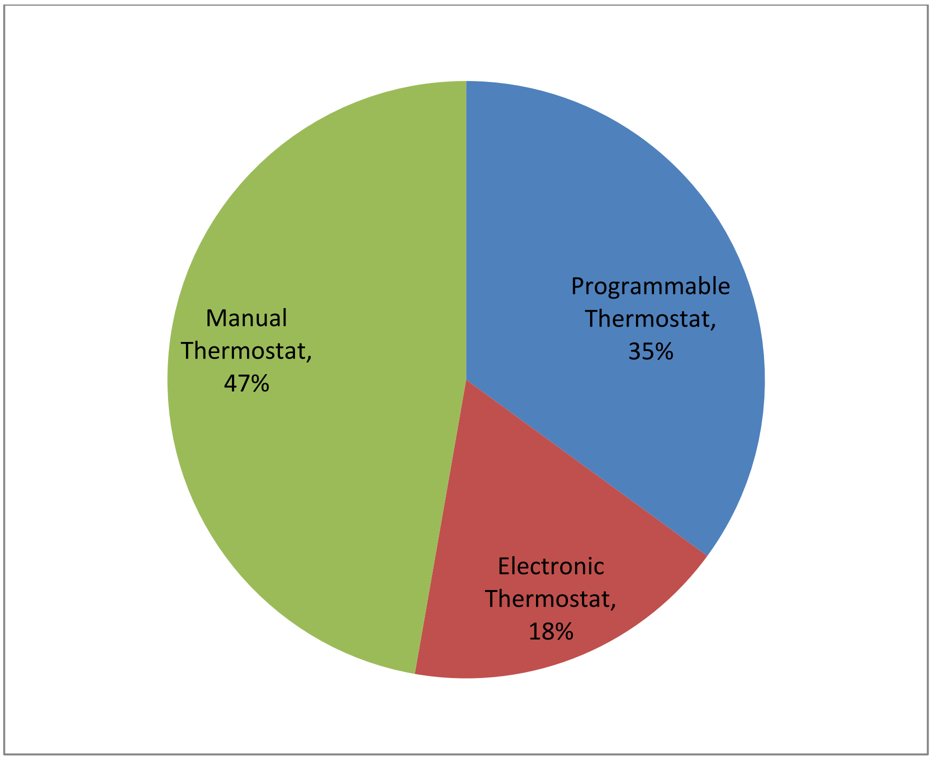


Figure 5-4 presents the distribution of thermostat types participating retailers sell. Participating retailers reported selling more manual thermostats (47%) than programmable (35%) or electronic ones (18%). Non-participant retailers reported a nearly identical trend in sales by thermostat type.

Figure 5-4: Participating Retailer Reported Sales of Thermostats by Type



Participating retailers went on to report that standard manual thermostat sales were more prevalent in Rest of Island/Labrador than in Avalon (56% vs. 31% respectively), and electronic thermostats were less prevalent (14%) in Avalon than in the Rest of Island/Labrador region (21%). Non-participating retailers sold the most standard manual kind (58%) along with programmable (28%) and electronic ones (14%). Table 5-5 provides data about thermostat types and sales across the retailer respondent pools.

Table 5-5: Types of Thermostats Sold Since 2009

	Participating Retailers - Rest of Island/Labrador	Participating Retailers - Avalon	Non-participants
n (# of retailers who responded)	19	6	3
Programmable	27%	55%	28%
Electronic	16%	14%	14%
Manual	56%	31%	58%

**May not sum to total due to rounding.*

5.2.2 Program Satisfaction

We asked participating retailers to name what aspects of the *takeCHARGE* program he/she found work well, or are helpful. Among retailers who were able to isolate a particular helpful or effective program component, there were two common response themes. One of the most frequently named program elements that was working well was marketing. Retailers repeatedly named TV Advertising, in-store promotions or coupons, and hand out brochures as effective promotion tools. A secondly commonly mentioned response was that the programs -- or specifically, the incentive programs offered – were working well. Several retailers indicate that the program, or the incentive (or both) has ultimately helped their business through increased sales.

Participating retailers were also asked the inverse question; that is, to name aspects of the *takeCHARGE* program that he or she would like to *change or improve*. Our team summarized their suggestions into three main areas:

- Do more marketing / promotion of the program. A few retailers specifically asked for more in-store promotions.
- Increase or widen available customer incentives. Retailers offered a variety of responses within this topic; some simply wanted customers to get a larger incentive for an energy efficiency measure purchase and installation; other respondents wanted additional measures incented within the program offerings.
- Help with the program rebate form process and/or move to online applications.

5.2.3 Program Outreach and Role of Energy Efficiency

Role of Energy Efficiency

Both participating and non-participating retailers unanimously confirmed – in both the Avalon and Rest of Island regions -- they perceived ENERGY STAR Windows and high-R value basement insulation incented through the *takeCHARGE* program to be a "good value". Not surprisingly, the same group unequivocally confirmed they plan to continue sales of both measures based on the current market.

Retailers mentioned a number of reasons why ENERGY STAR windows, in particular, were a good value for customers. Factors they mentioned included:

- With rebate they are the same price as standard windows
- Improved household comfort
- Save energy
- Save money on utility bill
- Better R-value
- Less condensation on windows in winter

The same respondents also had a favorable r perception of programmable thermostat value; with over 90% of all retailers said thermostats were a 'good value'. The remaining retailers were unsure about the measure's value or indicated they "don't recommend" programmable thermostats. This finding was consistent across both the Avalon and Rest of Island/Labrador regions.

Retailers who confirmed they thought thermostats were a 'good value' reported a number of reasons why they felt that way. Their value statements included the following:

- *takeCHARGE* rebate offset increased costs of electronic and/or programmable thermostats compared to manual units
- Saves energy when home unoccupied
- Saves energy during night time set-back
- Saves money on utility bills
- More accurate temperature control than manual ones
- Added function of automated control

The non-participant respondent sample size about programmable thermostats was too small to draw reliable conclusions about their measure value perceptions or future sales plans.

Marketing & Outreach

As the most direct way of measuring program marketing efforts, we asked participating retailers how they heard about the takeCHARGE program. Avalon retailers most frequently confirmed that a utility representative was responsible for their program knowledge; other methods listed by retailers were direct mail, mass media (such as a TV ad), or some other word of mouth option. Rest of Island/Labrador retailers' answers were often unique, with answers ranging from a Hydro representative to measure manufacturers or corporate store offices.

All of the participating retailers in Avalon and 80% of those in Rest of Island/Labrador confirmed their marketing of the *takeCHARGE* program has increased since 2009; the remainder felt their marketing has kept the same pace. Most of the non-participating retailers surveyed within this evaluation report that their product marketing had increased since 2009.

Participating retailers we surveyed in both Avalon and Rest of Island/Labrador most frequency indicated they used flyers to advertise their services. Mass advertising tools, such as TV, radio, or the yellow pages, were mentioned nearly as frequently. Participating retailers also listed social media (i.e., Facebook) and Word of Mouth as channels it used to advertise.

We asked the retailers we surveyed who sold insulation about the frequency of customer inquiries about insulation in particular. Self-initiated customer inquiries could be one way to measure whether program marketing and outreach were sufficient. Fifty-six percent of retailers overall reported "often" receiving customer inquiries about insulation, 37% do "sometimes" and 7 percent "never" did. About three out of every four Rest of Island/Labrador retailers reported the customer inquiries about insulation happen "often", while about half of participating Avalon retailers reported that level of frequency. Only one non-participant responded to this question and rated their customer inquiry level about insulation retailer at "often". Table 5-6 displays the insulation inquiry frequency by utility.

Table 5-6: Frequency of Customer Inquiries about Insulation

	Rest of Island/Labrador	Avalon	Non-participants
n (# of retailers who responded)	15	6	1
Often	73%	50%	100%
Sometimes	27%	25%	0%
Almost never	0%	25%	0%

We asked retailers to indicate how satisfied they are with the marketing support provided by the *takeCHARGE* program, connected to the windows/thermostats/insulation they sell. In order to gauge their satisfaction, we asked them to rate it on a scale of 1 to 5 where 5 translates to 'Very Satisfied' and 1 equals 'Very Dissatisfied'. Roughly 90 percent of both Rest of Island/Labrador and Avalon retailers put their satisfaction at a '4' or a '5', indicating a majority of surveyed retailers were indeed satisfied with the program marketing support. However, about 10% of participating retailers indicated rated their satisfaction level at a "3" or lower. The respondents who did not rate their satisfaction a '4' or a '5' put their marketing support satisfaction at a '3', or in neutral territory or gave it a rating of '2' -- or not satisfied. This dissatisfaction articulated by a small share of retailers, however, as with any energy efficiency program there may be room for more marketing.

Finally, we asked retailers if their business helped contractors participate in the *takeCHARGE* program, as part of its program outreach efforts. This was not a popular concept among retailers. Only three of the retailers responded that they had helped contractors.

5.2.4 Retailer Motivation for Participation and Non-participation

Retailers almost universally felt there were no identifiable barriers to promoting energy efficient equipment. The few that did identify a promotion disadvantage named the customer education process, program paperwork, or that energy efficiency measures were more expensive. When asked to identify the reasons, if any, residential customers do not purchase *takeCHARGE* program measures; the most frequent barrier was expense.

We asked retailers to get more specific about barriers connected with certain measures. Some participating retailers were able to provide some insight into why a customer might not buy ENERGY STAR Windows. Barriers to an ENERGY STAR Windows purchase listed by retailers include:

- Perception that they are more expensive
- Already have new windows
- Window replacement is for a non-electrically heated home

A small portion of participating retailers indicated that some customers –especially older customers – may have some confusion over how to use thermostats offered through the program.

6 MARKET ANALYSIS

6.1 Baseline Market Characterization

This section describes the baseline characteristics of the market for basement and attic insulation, ENERGY STAR windows and programmable and electronic thermostats. In addition, it highlights the installation practices taken by customers since 2009. The analysis was based primarily the analysis of the participant and non-participant survey data. Survey data from retailers and contractors was used to corroborate the trends and findings from the customer surveys.

6.1.1 Baseline Market for Attic/Crawl Space, Basement Wall and Basement Ceiling Insulation

6.1.1.1 Non-participant Baseline Market - Insulation

Table 6-1 summarizes the type and level of insulation installed in non-participant homes. On average, non-participants have insulated 90% of their attic or crawlspaces, 60% of exterior basement walls and 30% basement ceilings.

Blanket insulation was the most common type of insulation in attics and basement ceilings, 70% and 49%, respectively. The type of insulation used on basement walls was split between blankets (36%) and rigid foam boards (34%). Spray foams and loose fill were used in all three locations of homes but typically accounted for less than 8% of the installations.

The average thickness of the insulation was 8.2 inches for blanket insulation in basement ceilings and 1.9 inches for foam board applied to exterior basement walls and ceilings. The R-value of insulation added to basement walls was R-20 or less for 62% of the non-participants. R-20 to R-30 was the most common insulation range for basement ceiling and attic/crawl space insulation.

Table 6-1: Insulation in Non-Participant Homes

Non-Participants	Exterior Basement Walls	Basement Ceiling	Attic/Crawl Space
Percent of area insulated (n=212)*	60%	30%	90%
Type of Insulation	n=173	n=109	n=176
Blanket (batt or roll)	36%	49%	70%
Foam Board	34%	10%	2%
Spray Foam	6%	3%	7%
Loose Fill	3%	3%	16%
Don't Know	23%	23%	8%
R-Value	n=72	n=56	n=139
< = R-20	62%	22%	18%
> R-20 to < R-30	10%	37%	31%
R-30 to < R-35	0%	3%	4%
> R-35	0%	4%	18%
Don't Know	27%	33%	29%
Average Thickness of Insulation (Inches)	n=72 & 64*	n=22 & 11*	n=22*
Blanket or Loose Fill	4.4	8.2	7.1
Foam Board or Spray Foam	1.9	1.9	3.2

** n refers to the number of respondents who responded to the question*
*** The first n is the sample size for blanket or loose fill insulation and the second n refers to the sample size for foam board or spray foam respondents.*
****May not sum to total due to rounding.*

Thirty-three percent of non-participant basements were fully heated, 10% partially heated and 40% are not heated at all. Basements in the Avalon region were more likely (70%) to be heated for non-participants than they were for the Rest of Island (30%) and Labrador (60%). Non-participants over 40 years old were more likely to have an unheated basement than younger homeowners under the age of 40 (7%).

Analysis of the survey data identified several statistically significant results among the non-participants.

- While basement ceiling and basement wall insulation accounted for the largest share of insulation in all three regions, it was highest in the Avalon area (80%) compared to non-participants in Labrador (60%) and Rest of Island (50%).
- Homes built prior to 1980 were less likely (50%) to have basement wall insulation compared to newer homes. Seventy percent of the homes built between 1981 and 2008 had some type of wall insulation while 90% of the homes built after 2008 had basement wall insulation. The high incidence level of basement wall insulation in new homes reflected the implementation of the new building codes.
- Basement wall insulation was most prevalent in larger homes with square footage greater than 2,500 square feet (80%) compared to midsized homes (1,000-2,500 square feet) and small homes (<1,000 square feet), 60% and 50% respectively.

- Over half of the non-participants who did not know whether or not their basement walls were insulated felt that the current insulation levels were adequate.
- Homes in Avalon had basement wall insulation that is on average one inch thicker (4.9 inches) than homes in Labrador and the Rest of Island.
- Non-participants who were under the age of 40 had an average of 14 inches of basement ceiling insulation which was twice the thickness reported by non-participants over the age of 40.
- Attic insulation in Labrador homes was less thick (5.1 inches) than for homes in Avalon (7.9 inches) and the Rest of Island (7.4 inches).
- Homes built before 1980 had less attic insulation (5.8 inches) than homes built from 1981 to 2008 (7.9 inches) and newer homes built after 2008 (9.5 inches).

Since the *takeCHARGE* Insulation Rebate Program was offered in 2009, non-participants were asked about their basement and attic insulation purchases made beginning in 2009 through 2012. Of the non-participant insulation installations, 57% were for the attic, 29% for the basement wall and 17% for the basement ceiling.

Table 6-2: Location of Non-Participant Insulation Installations

Non-Participants	Type of Insulation (n=43)
Attic insulation	57%
Basement wall insulation	29%
Basement ceiling insulation	17%
Don't Know	12%
REFUSED	7%

* *n refers to the number of respondents who responded to the question.*

For non-participants, attic or crawl space installation was the most common type of insulation purchase across the three regions. Furthermore, it had the highest share in the Rest of Island region. Attic was more prevalent in Rest of Island (72%) than in both Avalon itself (53%) and Labrador (13%).

6.1.1.2 Participant Baseline Market - Insulation

The majority of *takeCHARGE* participants, 77%, stated that there were no remaining opportunities to install additional insulation in their attics, basement walls and basement ceilings. However, there remained opportunities for attic insulation among 10% of the participants of those participants, 36% had previously participated in the insulation program, 26% in the ENERGY STAR windows program and 36% in the programmable thermostat program.

When asked if any opportunities for installing basement insulation in their homes existed, 13% of participants responded yes. Of these participants, over half of the respondents (51%) were *takeCHARGE* insulation participants while 34% had participated in the thermostat program and 15% in the ENERGY STAR window program.

For both attic and basement insulation, participants cited the cost (26%), timing of installation would be inconvenient (27%) or other (32%) as the primary reason for not installing the additional measures. Cost consideration was statistically significant among insulation program participants. Table 6-3 shows the breakout of responses.

Table 6-3: Reasons Participants Did Not Install Additional Measures

Reason for Not Installing Additional Measures	n=94
Could not afford to do more/ran out of money	27%
Was not convenient to do the measure at that time	26%
Did not think the savings justified the costs	6%
Did not fit with other aspects of the overall project	5%
The rebate application was complicated/lengthy to complete	3%
Other	32%
Don't Know	1%

** n refers to the number of respondents who responded to the question.*
****May not sum to total due to rounding.*

6.1.1.3 Insulation Baseline Market – Retailer/Contractor Perspective

Sales of insulation products among participating retailers corroborated the installation trends among both participants and non-participants. Of the 32 participating retailers interviewed, 23 provided information regarding the type of insulation products sold. Participating retailers reported selling a variety of types of insulation with blanket and foam board being the most common across both the Rest of Island/Labrador and Avalon regions with no virtually not differences between the two regions. Only one non-participating retailer provided information about the type of insulation sold and reported selling only blanket type of insulation.

Table 6-4: Types of Insulation Sold by Retailers

Types of Insulation Sold	All Participating Retailers (n=23)
Blanket	83%
Foam board	75%
Loose fill	50%
Spray	29%

** n refers to the number of respondents who responded to the question.*

Similarly trends patterns existed between the Rest of Island/Labrador region and the Avalon region regard the R-values of the insulation. The most common R-value of the insulation sold by participating was R-20 (41%). Five percent of insulation sold by participatants was less than R12 and 14% was greater than R-20. The one non-participating retailer mostly (80%) sold rolls of insulation that are about R-20. Again, the small sample sizes limit the ability to generalize the findings for both participating and non-participating retailers to the population.

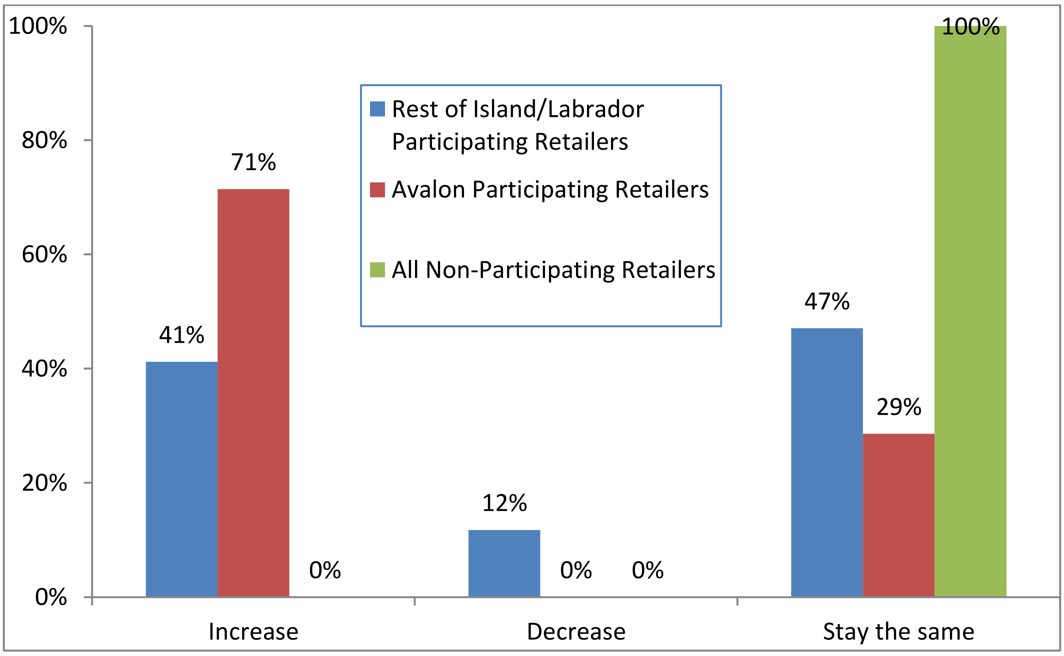
Table 6-5: R-value of Insulation Sold by Retailers

R-Value	All Participants (n=23)	All Non-Participants (n=1)
< R-12	5%	0%
R-12	6%	0%
> R-12 to< R-20	16%	0%
R-20	41%	80%
> R-20 to < R-25	4%	0%
> R-25	10%	0%

** n refers to the number of respondents who responded to the question.*
****May not sum to total due to rounding.*

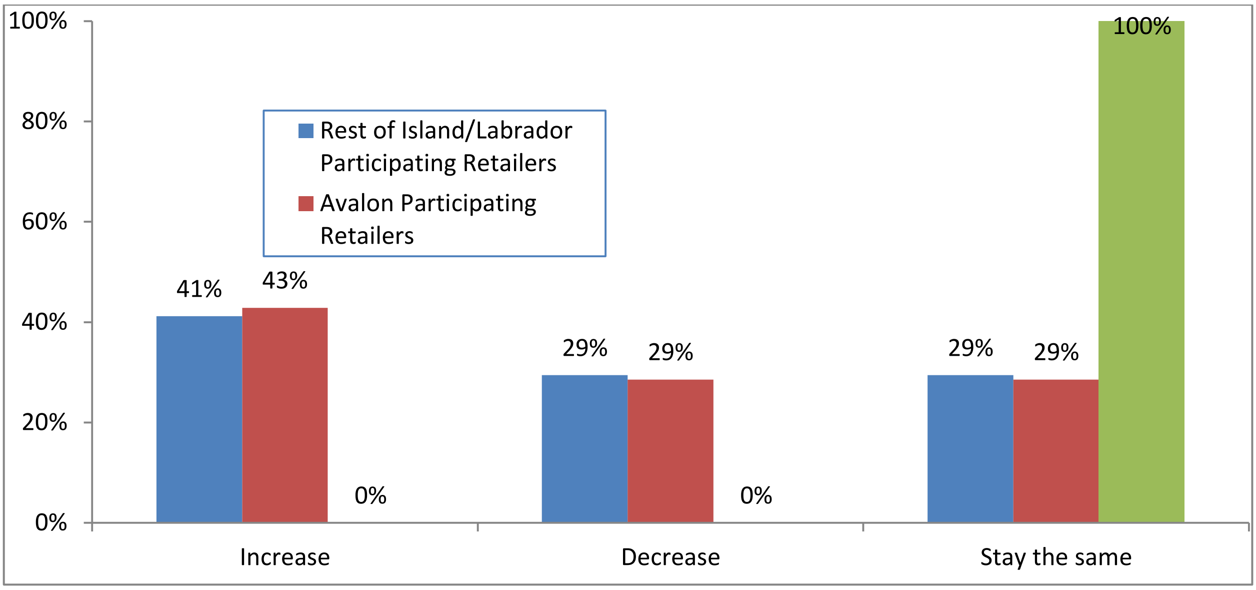
Differences among the change in insulation sales to contractors differed among the two regions. Participating retailers in Rest of Island/Labrador were fairly split between seeing an increase in market share sales and no change in market share. However, in Avalon, 71% or respondents indicated an increase in market share while only 29% saw no change. The one non-participating retailer that sells insulation reported sales to be unchanged since 2009.

Figure 6-1: Insulation Market Share to Contractors Since 2009



Over 40% of participating insulation retailers in both regions reported that the market share to DIY customers increased, nearly 30% reported that it decreased and the remaining 30% said that it remained the same. The one non-participating retailer who sells insulation reported that sales to DIY customers were unchanged since 2009.

Figure 6-2: Insulation Market Share to DIY Customers Since 2009



Ninety-five percent of participating retailers think that current insulation sales trends will continue into the future and the remaining 5 percent are unsure. Similarly the non-participant thought current sales trends would continue.

6.1.2 Baseline Market for Windows

6.1.2.1 Non-participant Baseline Market - Windows

Non-participants were asked about the type of window and window frames installed in their homes. Non-participants had on average 12.2 windows in their homes. The number of windows was not statistically different across the three regions. When asked about the percentage of windows in their homes that were single pane only 8% stated that had some single pane windows in their homes while 73% of respondents stated that none of their windows were single pane. Furthermore, 75% on non-participants had at least one double pane window and 59% of those respondents had 100% double pane windows.

Table 6-6: Window Type for Non-Participants

Window Characteristic	Total	Avalon	Rest of Island	Labrador
Average Number of Windows	12.2	13.6	10.9	12.7
Type of Window - *Single Pane*	8%	7%	9%	7%
Type of Window - *Double Pane*	75%	73%	79%	72%

**May not sum to 100% because customers may have responded OTHER or DO NOT KNOW to the question.*

The type and mix of double pane windows varied across respondents. The respondents were asked about the percentage of windows in each of the following categories: Gas filled, UV coated or low e and ENERGY STAR. Since some gas filled or UV coated windows also qualify as ENERGY STAR windows, the respondents reported the percentages for these windows in both the response categories. Table 6-7 shows the penetration range for each window type. For ENERGY STAR windows, nearly a quarter of non-participants indicated that none of their windows were ENERGY STAR windows. Over half of the non-participants, 55%, resided in homes with all ENERGY STAR windows. Overall, ENERGY STAR windows account for 57% of the windows among non-participants.

Table 6-7: Window Type Penetration for Non-Participants

Percentage of Windows	Gas Filled	UV Coated	ENERGY STAR Certified
0% (No windows)	47%	52%	23%
100% (All windows)	39%	25%	55%
Average % of windows	33%	23%	57%

**May not sum to total due to rounding.*

Non-participants were asked about their purchasing patterns for windows since the *takeCHARGE* programs were offered in 2009. Over 35% of non-participants bought new windows since 2009 and purchased an average of 4.6 windows. Table 6-8 shows the distribution of the number of windows purchased by non-participants.

Table 6-8: Number of Windows Purchased by Non-Participants

Number of Windows Purchased Since 2009	n=75
< = 5	38%
6 to 10	32%
11 to 15	14%
>15	13%
Don't Know	2%
Average # of Windows	4.6

**May not sum to total due to rounding.*

These respondents were then asked about the type of windows they purchased since 2009. Double pane windows accounted for the majority of the respondents' purchases and 45% of respondents purchased ENERGY STAR windows. Table 6-9 shows the type of windows purchased by non-participants since 2009.

Table 6-9: Type of Windows Purchased by Non-Participants Since 2009

Type of Window	n=75
Double pane	74%
ENERGY STAR	45%
Gas filled	30%
UV coated	11%
Other	4%
Don't Know	3%

**May not sum to total due to rounding.*

Vinyl frames were the most common type of window frame for 89% of non-participants.

6.1.2.2 Participant Baseline Market - Windows

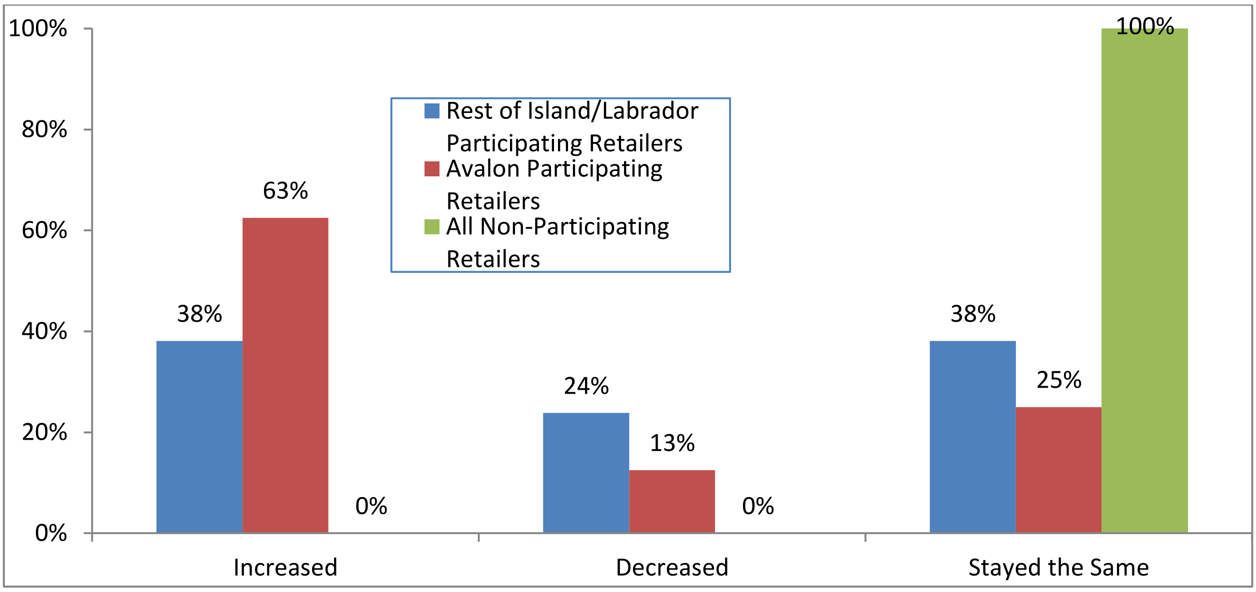
All *takeCHARGE* program participants were asked if there were any remaining opportunities to install ENERGY STAR windows in their homes. Of the 151 participant respondents, 27% of participants indicated there were additional opportunities for ENERGY STAR windows. Of those respondents, the majority of the participants were in Avalon 65%. Only 1% of participants with remaining opportunities resided in Labrador. Given the small number of respondents, the results were not statistically significant at either the 90% or 95% confidence level.

Furthermore, 21% of the participants with additional opportunities had previously participated in the *takeCHARGE* ENERGY STAR Windows Program. Insulation participants accounted for 46% of the respondents and thermostat participants represented the remaining 33%. The major reasons for not installing additional measures were cost and the inconvenience associated with the project.

6.1.2.3 Windows Baseline Market – Retailer/Contractor Perspective

Retailers were asked about the changes in window sales since 2009. In general the trends and sales patterns were consistent with the information reported by participating and non-participating customers. Overall window sales to contractors were reported to have increased since the program was launched in 2009 for 63% of participating retailers in Avalon. This finding was consistent with the purchasing patterns reported by contractors. However, only 38% of participating retailers saw an increase in sales to contractors. Figure 6-3 shows the changes in sales to contractors. Some retailers in both rest of Island/Labrador and Avalon report a decline in contractor sales, 24% and 13% respectively. Windows sales to contractors were unchanged for the non-participating retailer.

Figure 6-3: Window Sales Volume to Contractors Since 2009



About half (53%) of participating retailers believed that the share of windows sales to DIY homeowners) increased since 2009, 22% stated it was the same and 24% indicated a decline. These proportions held across the two utilities for participants. Sixty-seven percent of non-participants who sell windows said the DIY market share was the same and 33 percent said it decreased. The responses from this small sample did not necessarily reflect the trends experienced by the population of participating and non-participating retailers.

Two-thirds of window sales were ENERGY STAR certified according to participating retailers. Participants in the Avalon/Rest of Island report selling ENERGY STAR certified windows at about twice the rate (78%) as Labrador retailers (40%). Participating retailers reported selling more (24%) double pane windows than single pane (4%) ones. Non-participating retailers that sell windows report selling fewer (33%) ENERGY STAR windows, but still sell 80 percent that are gas-filled, and thereby necessarily also multi-paned. Table 6-10 shows the distribution by window type.

Table 6-10: Types of Windows Sold by Retailers Since 2009

Percentage of Window Type Sold	NP Participating Retailers (n=17)	Hydro Participating Retailers (n=11)	All Participating Retailers (n=28)	All Non-Participating Retailers (n=3)
ENERGY STAR Certified	78%	40%	**67%**	**33%**
Double Pane	26%	36%	**29%**	**33%**
Gas Filled	23%	28%	**24%**	**80%**
Single Pane	5%	0%	**4%**	**0%**
UV Coated	0%	0%	**0%**	**0%**

* *n refers to the number of respondents who responded to the question.* *

***Total sums to more than 100% because respondents some windows have more than one characteristic. Such is the case with ENERGY STAR windows since most are also double pane, and it's likely that none are single pane.*

6.1.3 Baseline Market for Thermostats

6.1.3.1 Non-participant Baseline Market - Thermostats

Non-participants were asked about the quantity and type of thermostats in their homes. Table 6-11 shows the distribution of thermostats across the regions. Overall, the average number of thermostats in non-participants' homes was 7.7. Standard thermostats were cited as the most common type across all three regions, followed by electronic thermostats. Avalon respondents reported a larger number of thermostats across all types which were statistically significant different from the results reported for the Rest of Island and Labrador respondents. The responses from this small sample did not necessarily reflect the trends experienced by the population of participating and non-participating customers.

Table 6-11: Average Number Thermostat Types by Region

Thermostat Type	All Regions	Avalon	Rest of Island	Labrador
Manual (n=127)	7.0	8.4	6.2	6.9
Programmable (n=212)	1.6	2.1	1.3	1.4
Electronic +/- 5 Degrees Celsius (n=180)	2.5	3.5	1.6	2.9
Average Total Number of Thermostats Per Home (n=212)	7.7	8.9	6.7	7.9

* *n refers to the number of respondents who responded to the question.*

Non-participants reported setting their thermostats at 21.3 °C when a room was occupied and 15.6 °C when it was unoccupied. Respondents' homes were on averaged unoccupied for 7.2 hours each day during the work week. The majority of non-participants with programmable thermostats, 62%, did use the thermostat to automatically adjust the temperature settings while only 29% utilized the automatic programming features.

Since the *takeCHARGE* Thermostat Program was offered in 2009, 37% of non-participants purchased new thermostats buying an average of 2.5 thermostats.

Table 6-12 shows the quantity of thermostats purchased by non-participants. Since 2009, programmable thermostats followed by electronic thermostats were the most commonly purchased units.

Table 6-12: Quantity and Type of Thermostats Purchased

Number of Thermostats	Programmable (n=76)	Electronic thermostats +/- 0.5 degrees Celsius (n=76)	Manual (n=76)	Other (n=76)
0	38%	51%	54%	92%
1	22%	12%	11%	0%
2 to 5	24%	3%	10%	1%
6 to 10	8%	2%	8%	0%
>10	8%	6%	1%	1%
Don't Know/Refused	6%	7%	3%	6%
Average # Purchased	2.5	1.9	1.7	0.1

** n refers to the number of respondents who responded to the question.*

**May not sum to total due to rounding.*

6.1.3.2 Participant Baseline Market - Thermostats

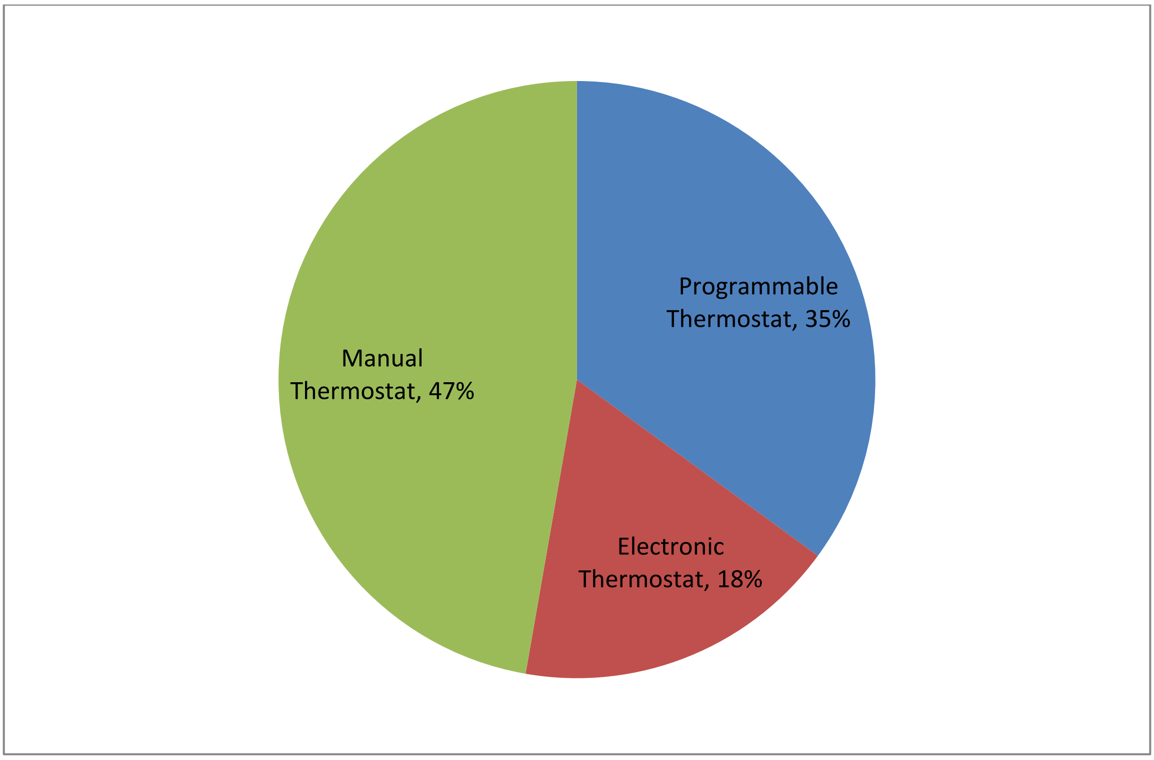
takeCHARGE program participants were asked about the remaining opportunities for programmable and electronic thermostats and their purchasing behavior outside of the program. Twenty eight percent of participants report additional opportunities to install programmable or electronic thermostats in their homes. Labrador participants indicated that there were no additional opportunities for programmable or electronic thermostats. This finding contradicts the market perspective of participating retailers in the region. Participating retailers stated that manual thermostats were prevalent and offered a potential savings opportunity. This discrepancy in self-reported data may warrant further research by the Utilities.

Furthermore, 40% of the window program participants and 32% of the respondents were previous thermostat participants. Both of these findings were statistically significant at the 95% level. The responses from this small sample did not necessarily reflect the trends experienced by the population of non-participant customers.

6.1.3.3 Thermostat Baseline Market – Retailer/Contractor Perspective

Overall, participating retailers reported selling more standard thermostats (47%) than programmable (35%) or electronic ones (18%) (See Figure 6-4 below). For non-participating retailers the break-out was similar; 58 percent standard, 28 percent programmable and 14 percent electronic.

Figure 6-4: Participating Retailer Reported Sales of Thermostats by Type



For participating retailers, manual thermostat sales were more prevalent in the Rest of Island/Labrador region than in Avalon 56% vs. 31% respectively, and electronic thermostats were slightly less prevalent (14%) in the Avalon than Rest of Island/Labrador (16%). Non-participating retailers sold the most standard manual kind (58%) along with programmable (28%) and electronic ones (14%) as shown in Table 6-13. These results were based upon a small number of respondents and may not be reflective of the population participating and non-participating retailers.

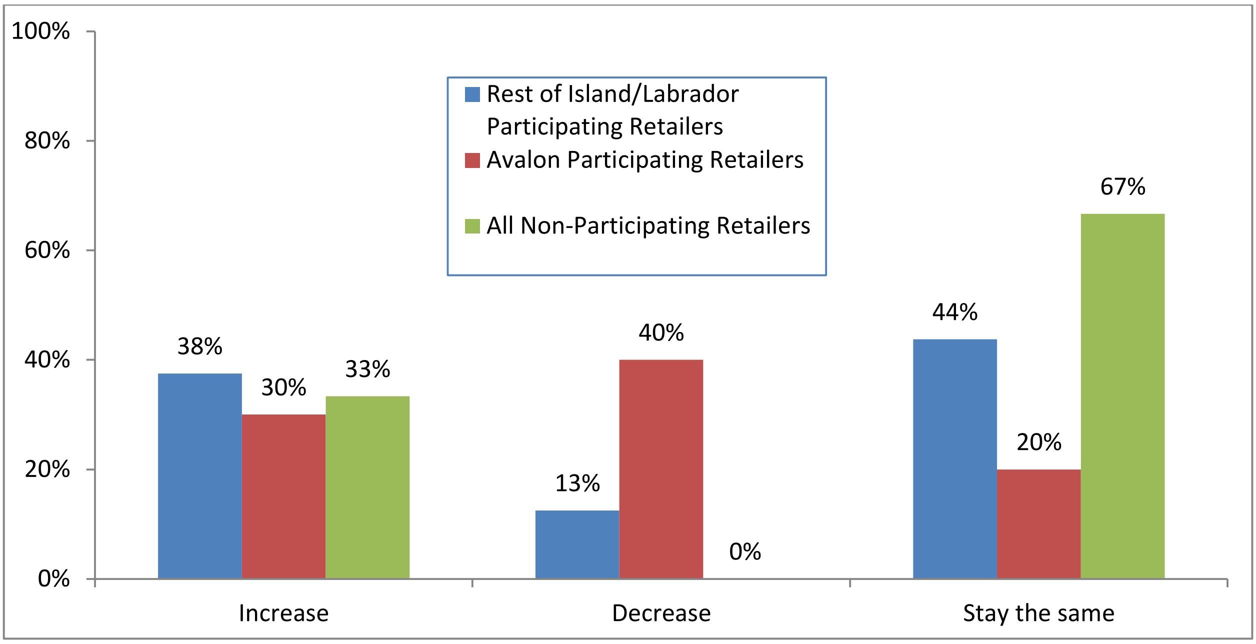
Table 6-13: Types of Thermostats Sold by Retailers Since 2009

Types of Thermostats	Rest of Island/Labrador Participants (n=19)	Avalon Participants (n=6)	All Non-Participants (n=3)
Programmable	27%	55%	28%
Electronic	16%	14%	14%
Manual	56%	31%	58%

** n refers to the number of respondents who responded to the question.*
***May not sum to total due to rounding.*

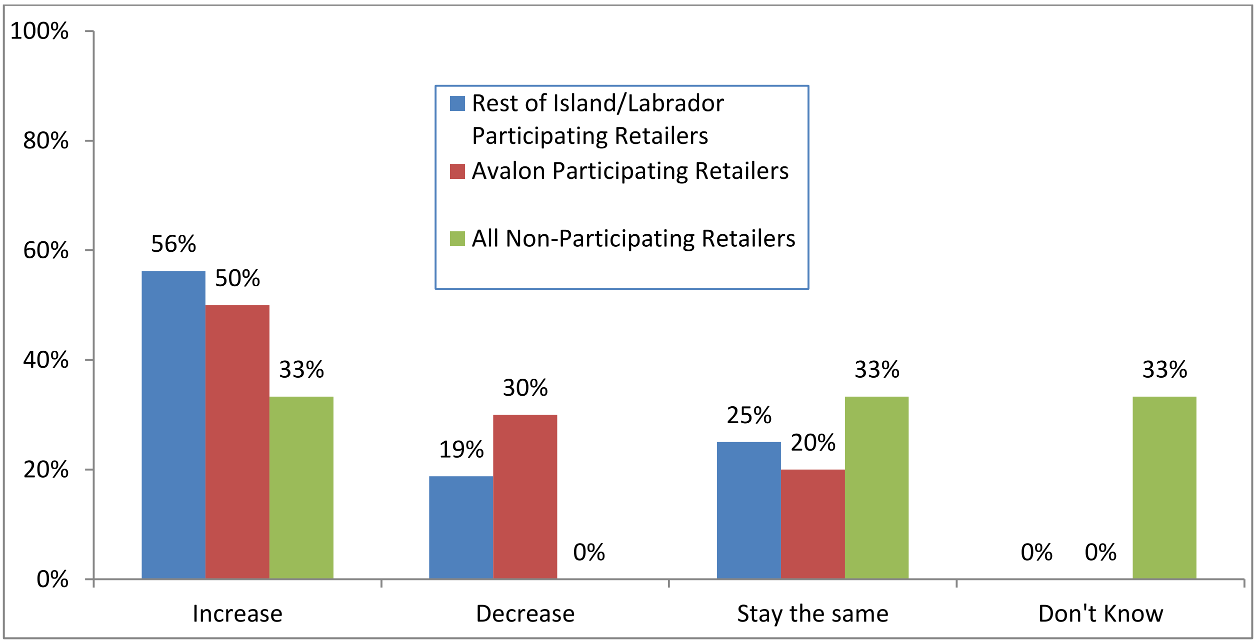
Among participating retailers, 35% reported that thermostat sales were on the upswing since 2009, 20% report a decrease and 37% reported this being unchanged. Thirty-eight percent of Newfoundland Power's participating retailers reported an increase in thermostat sales and only 13% report a decrease. The inverse was the case in Hydro's service territory with only 30% of participants reporting an increase, and 40% reported a decrease since 2009. Similarly, 30% of non-participants report an increase in thermostat market share to contractors and the remaining (70%) report that it is unchanged since 2009, as shown in Figure 6-5.

Figure 6-5: Thermostat Market Share to Contractors Since 2009



Fifty-five percent of participating retailers reported an increase in thermostat sales to DIY homeowners, 21 reported a decrease and 24 percent said that it has stayed the same since 2009. Even though participants in both service territories reported an increase in thermostat sales to DIY homeowners, more NP area retailers reported an increase than do Hydro area participants (56% vs. 50%). An equal percent (33% for each) of non-participating retailers reported that thermostat DIY homeowner market share had; increased, stayed the same and "did not know" as shown in Figure 6-6.

Figure 6-6: Thermostat Market Share to DIY Homeowners Since 2009



Ninety-three percent of participating retailers and 67 percent of non-participants said that programmable thermostats or efficient electronic thermostats are a "good value" for their residential customers.

Most participating retailers (85%) and non-participating ones (67%) feel that current thermostat sales trends will continue into the future based on their understanding of the current market. No one (0%) said that current sales trends would not continue, however 9% of participants and 33 % of non-participants were unsure. Ninety-one percent of participants report more marketing of thermostats and 9 percent of participants report that the frequency of marketing is unchanged since 2009. Similarly, 80% of non-participating retailers said their thermostat marketing has increased and 20% said that it is about the same since 2009.

6.2 Attribution Analysis

This section focuses on the actions taken by customers that can be attributed to the *takeCHARGE* programs. DNV GL relied on participant and non-participant survey data to develop estimates of free-ridership and spill over for each of the three *takeCHARGE* programs. Information collected through the contractor and retailer interviews were used to corroborate the findings from the survey data.

Free ridership is defined as the percentage of program savings that were incurred by participants who would have installed the measure in absence of the program. There are three components of free ridership that are analyzed and weighted to create an estimate of free ridership:

- Overall likelihood of purchasing the measure without the program
- The effect that that program had on the timing of the purchase of the measures
- The influence of the program on the quantity of measures purchased

The term "spill over" refers to a range of potential effects of energy efficiency programs. There are two types of spill over effects:

- **Participant spill over.** Participant spill over occurs when customers who have received financial and/or technical support for adopting an energy efficiency measure later purchase and install similar measures without using program incentives or services. To be counted as program effects, there must be some evidence that the customers in question took these actions as a result of their earlier participation in the program**.**
- **Nonparticipant spill over.** Nonparticipant spill over occurs when customers who have not participated in a program adopt the energy efficiency measures that the program supports as a result of the program. This could result from exposure to program-related public relations, vendor promotions, or word-of-mouth about the program and the benefits of efficiency measures.

6.2.1 Free-ridership

The free-ridership analysis focused on three aspects of participants' purchasing behavior to discern the influence of the program in the implementation of the programs' measures, specifically:

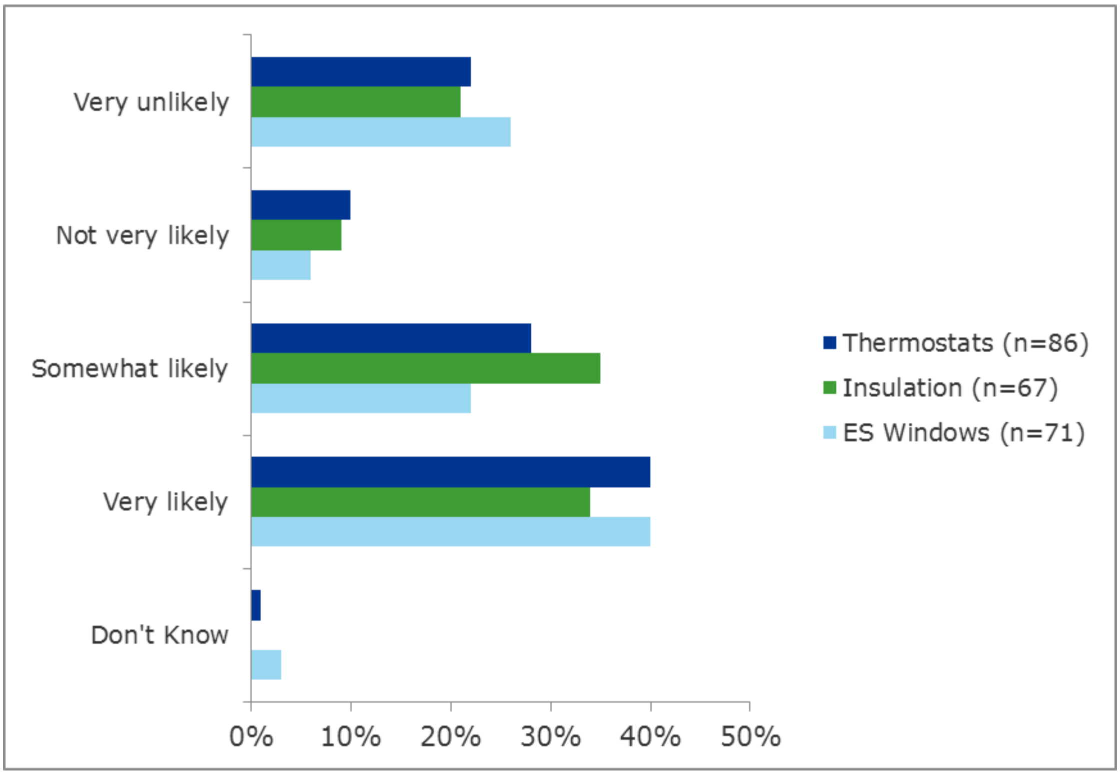
- Overall likelihood of purchasing the measure without the program
- The effect that that program had on the timing of the purchase of the measures
- The influence of the program on the quantity of measures purchased

The responses for all three effects were weighted together to create an estimate of free-ridership by program.

6.2.1.1 Likelihood of Participation

Program participants were asked what the effect of the program was on their decision to install ENERGY STAR windows, attic and basement insulation and programmable thermostats. They were asked how likely or unlikely they would have been to install these energy efficiency measures if they had not received the incentives (rebates) from the programs. Sixty-one percent of ENERGY STAR window participants, 69% of basement and attic insulation program participants and 67% of thermostat program participants said that they would have either been "very likely" or "somewhat likely" to have installed measures without program incentives. Figure 6-7 shows the responses by program.

Figure 6-7: Likelihood of Installing Measures Without the Program



** n refers to the number of respondents who responded to the question.*
***May not sum to total due to rounding.*

There were several statistically significant differences (at 90% level or higher) in who would and would not have installed measures without program incentives.

- ENERGY STAR Windows:
  - The program rebate was particularly important to those not living in single family homes as 85% said that the rebate was very important in their decision to install ENERGY STAR windows, compared to only 15% of single family home participants.
  - The rebate was more important to ENERGY STAR window participants who have a high school or less education (44%) compared to 8% of participants with some college, 10% with a college degree and 26% with a graduate degree.
  - Lower income participants who made less than $60k per year were more unlikely to have installed ENERGY STAR windows, 58%, compared to only 28% of participants with annual incomes between $60 and $100,000 and 20% of high income earners with incomes exceeding $100,000.
  - All participants with homes under 1,000 square feet indicated they would have installed ENERGY STAR windows without the rebate. The likelihood of installing the ENERGY STAR windows decreased as home size increased: 41% for midsized homes (1000-2500 ft2) and 37% of large homes (over 2500 ft2).
- Programmable and Electronic Thermostats

— Thirty nine percent of single family homes indicated that they were very likely to install programmable thermostats in the absence of the program and all of those respondents were very likely to have installed programmable thermostats without a rebate.
— All insulation program participants who lived in smaller homes (<1000 ft2) stated that they would have a programmable/electronic thermostat in the absence of the program compared to participants living in midsized homes (70%) and larger homes over 2500 ft2 (54%).
—

- Insulation Participants
  — Among insulation participants,60% of participants who were less likely to have installed insulation without the programs indicated that they were either very likely or somewhat likely to participate in future programs..

6.2.1.2 Timing of Purchasing Measures

Participants were asked about the effect of rebates on the timing of their purchase of ENERGY STAR windows, basement insulation or programmable thermostats. The insulation program rebates appeared to be the most effective at driving earlier purchases. Forty four percent of insulation participants accelerated the timing of their purchases compared to 11% of ENERGY STAR window program participants and 32% of thermostat program participants. Thirteen percent of thermostat program participants and 6% of ENERGY STAR window program participants and basement insulation program participants would never have installed these energy saving items without the program rebate. Less than 5% of participants in each of the three programs said they would have bought earlier as shown in Table 6-14.

Table 6-14: Program Effect on Timing of Purchases

Timing	ENERGY STAR Windows (n=71)	Insulation (n=67)	Programmable/ Electronic Thermostats (n=86)
At the same time	74%	46%	47%
Earlier	5%	3%	4%
Later	11%	44%	32%
Never	6%	6%	13%
Don't Know/Refused	5%	1%	5%

** n refers to the number of respondents who responded to the question.*
***May not sum to total due to rounding.*

The majority of program participants who indicated that they would have purchased the measures later stated that they would have purchased the measures within the next year. Table 6-15 shows the distribution of responses.

Table 6-15: Number of Months Later Measures Installed in Absence of the Program

Number of Months Later	ENERGY STAR Windows (n=7)	Insulation (n=30)	Programmable/ Electronic Thermostats (n=28)
0-12 months	100%	67%	60%
13-24 months	0%	20%	17%
Over 24 months	0%	4%	8%
Don't Know	0%	8%	15%

6.2.1.3 Effect of Program on Quantity Purchased

Program participants were asked about the effects of the program on the quantity of measures they would have purchased in the absence of the program incentives. Over 75% of the ENERGY STAR window program participants, 62% of insulation program participants and a little over half (55%) of thermostat participants stated they would have purchased the same quantity of energy savings measures without rebates. However, 16% of thermostat program participants along with 11% of ENERGY STAR window participants and 7% of insulation program participants would not have purchased any measures without the rebate. Also, 26% of the insulation participants, 25% of the thermostats participants and 7% of the ENERGY STAR participants would have installed fewer measures without the program.

One statistically significant difference among ENERGY STAR windows participants was found. The program appears to have impacted the likelihood that no ENERGY STAR windows would have been purchased among lower income folks the most. As 35% of households earning under $60k per year would not have purchased any windows at all, compared to only 9% of middle income earners ($60-100k) and 3% of upper income earners (earning over 100k).

6.2.1.4 *takeCHARGE* Free Ridership Estimates

The first step in the calculation of the free ridership estimates was to classify to each response of the free ridership questions as a free rider, partial free rider or not a free rider. For example, if a participant responded that they were very likely to install the measure in the absence of the *takeCHARGE* rebate, they would be considered a 100% free rider. Conversely, if a participant stated that they were very unlikely to install the measure without the rebate, they were classified as not a free rider or 0% free rider. Some participant behavior may be partially influenced by the rebate offer but not entirely; these types of participants are considered a partial free rider. For example, if a participant said that they were somewhat likely to install the measures, they were considered a 50% free rider. Table 6-16 shows the free ridership questions from the participant survey and the free ridership classification for the responses.

Table 6-16: Free Ridership Responses

Question	Response Categories	Free-ridership Weight	ENERGY STAR Windows	# of Respondents	Programmable and Electronic Thermostats	# of Respondents	Basement and Attic/Crawl Space Insulation	# of Respondents
Likelihood of installing the measure without the *takeCHARGE* rebate	# of respondents			71		67		86
	Very likely	100%	40%	28	34%	23	40%	34
	Somewhat likely	50%	22%	8	35%	12	28%	12
	Somewhat unlikely	25%	6%	1	9%	2	40%	9
	Very unlikely	0%	26%	0	21%	0	22%	0
Timing of the purchase of the measure without the *takeCHARGE* rebate	# of respondents			71		67		86
	Same time	100%	74%	53	46%	31	47%	40
	Earlier	100%	5%	4	3%	2	4%	3
	Later	25%	11%	2	44%	7	32%	7
	Never	0%	6%	0	6%	0	13%	0
Confirm unlikely to purchase the measure AND timing of purchase was not affected	# of respondents			16		6		7
	Yes	0%	66%	0	100%	0	100%	0
	No	50%	34%	8	0%	3	0%	4
Number of months earlier that the purchase would have been made	# of respondents			7		30		28
	0-12 months later	100%	100%	7	67%	20	60%	17
	13-24 months later	50%	0%	0	20%	2	17%	1
	>24 months later	0%	0%	0	4%	0	8%	0
Without the *takeCHARGE* rebate what is the quantity of the measure that would have been purchased	# of respondents			71		67		86
	Same number/size	100%	77%	55	62%	42	55%	47
	Fewer/smaller size	50%	7%	2	26%	9	25%	11
	More/larger size	100%	4%	3	3%	2	4%	3
	None	0%	11%	0	7%	0	16%	0

The number of free riders for each question response was calculated using the following formula and then summed across responses to derive the total number of free riders:

> *Number of Free Riders = (Free Ridership Weight) x (% of Participants for each Response x Total Number of Program Participants)*

DNV GL created free ridership estimates for each program that captured the likelihood of participation along with the effect of the timing of the installation and the quantity of the measure installed. The free ridership data for each question was weighted using the following:

- Likelihood of participation – 50%
- Timing of the installation – 25%
- Quantity of measures installed – 25%

Table 6-17 shows the free ridership estimates. Since free ridership affects the likelihood of installing a measure, the timing of the measure and the quantity installed, we recommend using a weighted free ridership value for the programs.

Table 6-17: Free Ridership Estimates

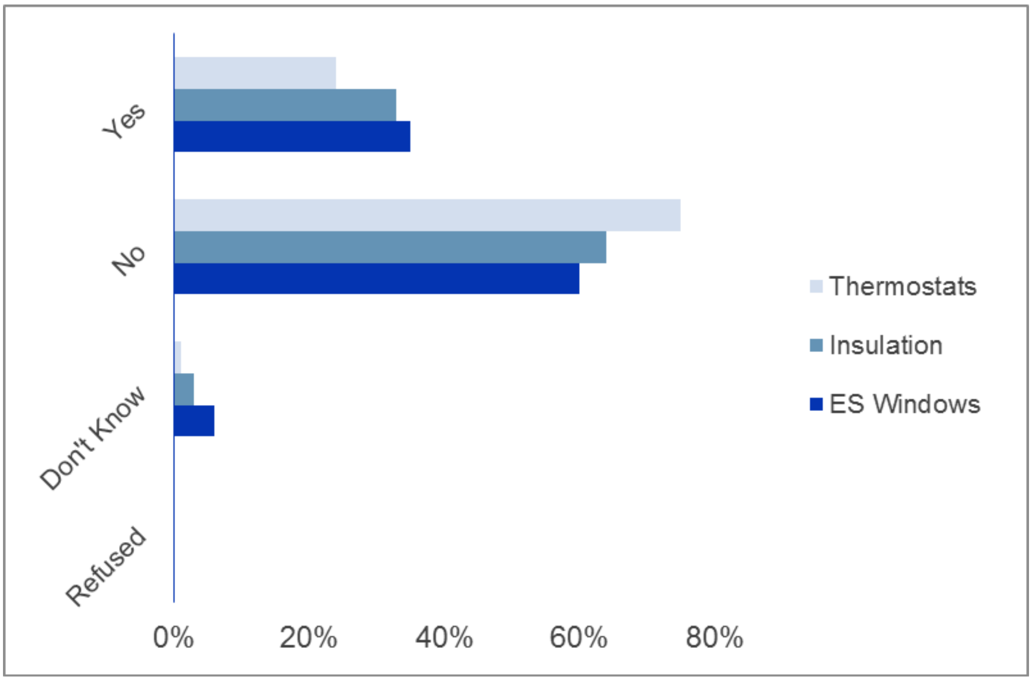
Free-ridership Estimates	ENERGY STAR Windows	Programmable and Electronic Thermostats	Basement and Attic Insulation
Weighted: 50% likelihood/25% timing/25% quantity	62%	48%	53%
Only on Likelihood	53%	54%	64%
Only on Timing	82%	60%	59%
Only on Quantity	85%	78%	72%

6.2.2 Spill Over

The spill over analysis focused on quantifying the installation of measures offered by the *takeCHARGE* program that occurred outside of the program. Participants were asked a series of questions regarding the type of measures installed and the influence of the program on the purchasing decisions. The responses were weighted to create an estimate of spill over for each program.

Participants were first asked if they had implemented any additional energy efficiency measures in their homes since participating that were not rebated by the program. Thirty-five percent of participants in the ENERGY STAR program, along with 33% in the insulation program and 24% of thermostat program participants, implemented additional measures not rebated by the program. Figure 6-8 shows the responses for each program.

Figure 6-8: Participants Who Implemented Additional Measures



****May not sum to total due to rounding.*

There were several statistically significant differences (at 90% level or higher) regarding participants who implemented additional measures outside of the program.

- Spill over was more common among ENERGY STAR window participants with older homes. Forty-six percent of ENERGY STAR windows program participants whose homes were built prior to 1980 implemented additional non-rebated energy efficiency measures in their homes. However, 32% of participants with homes built between 1980 and 2008 and only 9% of newer homes built after 2009 implemented measures.
- Insulation program participants who implemented additional energy efficiency measures are more likely to be motivated to save money than to save energy. As 43% of insulation program participants who were primarily motivated by money implemented additional energy savings on their own. This compares to only 25% of insulation program participants who were primarily motivated by a desire to save energy that implemented measures beyond those rebated by the program.
- Thirty-six percent of Avalon residents and 31% of residents on the Rest of Island reported implementing measures beyond those incentivized by the *takeCHARGE* programs; however none of the Labrador residents implemented additional measures.
- Thermostat program participants over the age of 64 were more likely (52%) than participants under 40 (30%) and those age 40-64 (17%) to have taken additional energy efficiency measures that did not receive an incentive.

The number average number of measures installed by participants outside of the program is shown in Table 6-18.

Table 6-18: Average Number of Measures Installed Outside of the Program

Number of "Spill Over" Measures	ENERGY STAR Windows (n=25)	Insulation (n=22)	Programmable/ Electronic Thermostats (n=71)
Average Number – Per Participant	6.0 windows	4.4 units (Either rolls or foam board)	3.9 thermostats

** n refers to the number of respondents who responded to the question.*

There were several statistically significant differences (at 90% level or higher) in regard to the number of additional participant actions taken that did not receive rebates under the *takeCHARGE* programs.

- Thermostat program participants who were satisfied with their program experience installed about twice as many thermostats not rebated by the program than unsatisfied participants, 4.1 vs. 2.0 on average.
- Surprisingly, thermostat program participants who were not just motivated to save money implemented about twice as many thermostats (4.7) than those primarily motivated to save money (2.7).

Program participants who engaged in spill over behavior were asked if their participation in the program influenced their decision to take additional energy saving actions. Forty-four percent of insulation program participants, 23% of ENERGY STAR window participants and 18% of thermostat program participants indicated that the takeCHARGE programs did influence their actions. The responses are shown in Table 6-19. Furthermore, the majority of the insulation participants who implemented additional insulation measures, 74%, lived in homes built before 1980.

Table 6-19: Participant Spill Over Actions Influenced by Program

Participant Influenced	ENERGY STAR Windows (n=25)	Insulation (n=22)	Programmable/ Electronic Thermostats (n=21)
Yes	23%	44%	18%
No	73%	56%	82%
Don't Know	4%	0%	0%

* *n refers to the number of respondents who responded to the question.*
****May not sum to total due to rounding.*

Participants were also asked if they would have installed additional measures if they had not participated in the program. Only 16% in the insulation program would not have acted, along with 13% in the ENERGY STAR windows program and 9% in the thermostat program, refer to Table 6-20. The high level of positive responses correlates the relatively high level of free ridership described in the previous section.

Table 6-20: Participants Who Planned to Install the Measures if did not Participate in the Program

Participant Installing Measures	ENERGY STAR Windows (n=25)	Insulation (n=22)	Programmable/ Electronic Thermostats (n=21)
Yes	87%	84%	91%
No	13%	16%	9%
Don't Know	0%	0%	0%

* *n refers to the number of respondents who responded to the question.*
****May not sum to total due to rounding.*

Spill over was more prevalent among low income households that participated in the ENERGY STAR windows program as 50% of additional measures would not have been installed without the program. This compares to only 10% of additional measures installed in middle income households ($60-100K) and 0% for higher income households (>$100k).

Participants were asked if they had made any changes in the way they manage energy use in their home since participation. Table 6-21 shows 45% of thermostat program participants, along with 37% of insulation program participants and 36% of ENERGY STAR windows participants have made changes.

Table 6-21: Participant Changes in Household Energy Management

Participants Changing Energy Management	ENERGY STAR Windows (n=25)	Insulation (n=71)	Programmable/ Electronic Thermostats (n=86)
Yes	36%	37%	45%
No	64%	60%	55%
Don't Know	0%	3%	0%

* *n refers to the number of respondents who responded to the question.*
****May not sum to total due to rounding.*

There were several statistically significant differences (at 90% level or higher) regarding participants who manage their household energy usage.

- For insulation program participants, changes in household energy management appeared to be the most common among people who are between the age of 40 and 64, with 47% indicated changing energy use behaviour since participating compared to only 23% of participants under the age of 40 and 15% of seniors 65 and older.

- Insulation program participants with children under the age of 17 were less likely (26%) to make changes in way household energy use is managed than those without children (49%).
- Insulation program participants with homes over 2,500 square feet were more likely (63%) to make changes in the way they manage household energy use, compared to 27% of midsized homes (1,000-2,500 ft2) and 0% for homes less than 1,000 square feet.
- Thermostat participants who had a high school education or less had the highest percentage of respondents who made changes to their energy usage compared to respondents with higher levels of education.
- Thermostat program participants living in homes less than 1,000 square feet and built before 1980 were more likely to have seen changes in the occupants' management of energy use after participating.

Participants who did make changes in the way they manage household energy use were asked if the program influenced their decision to make additional changes/improvements, and 60% from the insulation program, 49% from the thermostat program and 38% from the ENERGY STAR window program were.

Table 6-22: Participant Changes in Household Energy Management Influenced by Program

Participant Changes	ENERGY STAR Windows (n=27)	Insulation (n=25)	Programmable/ Electronic Thermostats (n=38)
Yes	38%	60%	49%
No	62%	36%	47%
Don't Know/Refuse	0%	3%	3%

** n refers to the number of respondents who responded to the question.*
****May not sum to total due to rounding.*

There were several statistically significant differences (at 90% level or higher) in regard program influenced changes in household energy use.

- Higher income earners in the insulation program were more likely (85%) to be persuaded by the program to take additional energy efficiency measures beyond those rebated by the program than those earning $60-100k (39%) and those earning less than $60k per year (57%).
- Insulation program participants living in new homes were least likely (25%) to have been influenced by their participation to take additional un-rebated action to save energy when compared to those in older homes (63%) and occupants of home built between 1980 and2008 (82%).

6.2.2.1 Spill over Estimates

The spill over analysis was comprised of two components:

- Estimating the percentage of participants who installed *takeCHARGE* measures outside of the program
- Estimating the percentage of non-participants who were influenced by the *takeCHARGE* program to install measures but chose not to participate

For participants spill over estimates were based upon two telephone survey questions that asked the influence of the *takeCHARGE* programs on their decisions to implement the additional measures. The questions were developed to ask the same information in two different ways as a means to verify the participant responses. The question responses serve as range of the spill over estimates. Table 6-23 shows the percentage of participants who installed additional measures, the influence of the program on their decisions and the assigned weight used to calculate spill over.

Table 6-23: Participants Implementing Additional Measures and Spill Over Question Responses

Participants	Spill Over Weight	ENERGY STAR Windows	Insulation	Programmable/ Electronic Thermostats
Do you have additional measure opportunities?		71	67	86
Yes		35%	33%	24%
No		60%	64%	75%
Did your participation in the program influence your decision to make these additional measures		25	22	21
Yes	100%	23%	44%	18%
No	0%	73%	56%	82%
Spill over Estimate 1		8%	14%	4%
Do you think you would have purchased and installed these additional measures if you had not participated in the program?		25	22	21
Yes	0%	87%	84%	91%
No	100%	13%	16%	9%
Spill over Estimate 2		5%	5%	2%

The participant spill over estimates were derived using the following calculations:

- ***Participant Spill over Estimate 1*** *= ((Number of Participants Implemented Additional Measures) x (% of Participants Who Responded that Participating in the Program Influenced Their Decision to Implement Additional Measures))/Total Number of Participants*

- ***Participant Spill over Estimate 2*** *= ((Number of Participants Implemented Additional Measures) x (% of Participants Who Responded that if They Would Not Have Implemented Additional Measures if They Had Not Participated in the Program))/Total Number of Participants*

The responses to both questions yielded relatively low spill over for participants further supporting the findings found in the free ridership analysis, that the majority of participants were planning to implement the measures without the programs.

The non-participant spill over analysis focused on their awareness of the program and the effect of the program on their decision to install the measures. Table 6-24 shows a high awareness of the *takeCHARGE* program offerings among non-participants who installed measures which resulted in high non-participant spill over ranging from 40% for thermostats to 50% for ENERGY STAR Windows. Non-participant spill over was estimated for each program based on the following calculation:

- ***Non-participant Spill over Estimate*** *=(% of Non-participants who installed measures that met the program requirements x number of non-participants who were aware of the program))/Total Number of Non-participants*

Table 6-24: Non-Participant Spill Over

Non-Participants	Spill Over Weight	ENERGY STAR Windows	Insulation	Programmable/ Electronic Thermostats
Non-participants Who Installed Measures and Aware of Measures Offered in *takeCHARGE*		75	43	76
Yes		68%	57%	61%
No		28%	41%	33%
Based upon awareness, did you purchase measures that met the program requirements?		51	24	47
Yes	100%	73%	87%	66%
No	0%	18%	5%	34%
Spill over Estimate		50%	49%	40%

6.3 Market Potential Estimates

This section synthesizes the results from the baseline analysis and attribution analysis to develop gross and net market share. Gross market share is defined as the remaining market share for each of the three technologies offered by the *takeCHARGE* program. We developed a range of market share estimates that reflected varying assumptions of adoption patterns among existing participants and non-participants. The net market share estimates were developed by applying the results of the attribution analysis to the gross market shares:

Net Market Share = Gross Market Share - Free Rider Customers + Spill Over Customers

Market share estimates were developed for each *takeCHARGE* program and by geographical region.

6.3.1 Gross Market Potential Shares

The first step in the market potential analysis was to estimate the number of eligible customers for *takeCHARGE* programs. This information was obtained from the Utilities for the most recent year available. Table 6-25 shows the total number of eligible customers. This information was used to derive the market potential for the customers who had not participated in the program.

Table 6-25: Number of Residential Customers Eligible for the *takeCHARGE* Programs

Number of Residential Customers Eligible for the *takeCHARGE* Programs				
	Total	Avalon	Rest of Island	Labrador
# of Customers	105,917	62,570	36,141	7,206

Newfoundland Power has 93,383 eligible customers. It was assumed that approximately 67% of the customers resided in Avalon with the remaining customers located in the Rest of Island region. Hydro has 12,534 customers with 7,206 located in Labrador and 5,376 in the Rest of Island region.

Table 6-26 shows the number of *takeCHARGE* participants

Table 6-26: Number of Participants in the *takeCHARGE* Programs

Number of Participants in the *takeCHARGE* Programs (2009-2012)				
	TOTAL	Avalon	Rest of Island	Labrador
Basement and Attic Insulation	5,175	3,328	1,743	104
Programmable and Electronic Thermostats	6,081	3,997	2,018	66
ENERGY STAR Window	5,437	3,564	1,806	67
TOTAL	16,693	10,889	5,567	237

Table 6-27 presents the estimate of eligible non-participants by region. It was calculated by taking the total number of eligible customers less the number of participants for each region.

Table 6-27: Number of Non-participants Eligible for the *takeCHARGE* Programs

Number of Residential Non-Participant Customers Eligible for the *takeCHARGE* Programs				
	Total	Avalon	Rest of Island	Labrador
# of Customers	89,224	51,681	30,574	6,969

The results of the market share analysis are presented below.

6.3.1.1 Gross Market Share – Basement and Attic/Crawl Space Insulation

The market share analysis estimated the remaining market share among participants and non-participants. The market share range assumed the following:

- Upper range assumed all participants with additional installation would install the measure
- Lower range assumed that a percentage of the participants, despite the opportunity would be unlikely to install the measure.

Of the nearly 17,000 participants 11% stated that there were additional opportunities for basement insulation, either wall or ceiling However, 62% of respondents indicated they would not install the measure, due to costs, inconvenience etc. This question was asked about all additional measures in general, not basement insulation specifically. The response was used as an indicator in the analysis as a proxy for likelihood to install the measure. Two estimates of gross market share were derived:

1. Maximum participant market share assumes all participants who cite additional opportunities install the measure.
2. Achievable market share assumes excludes the participants who stated they would not install the measure.

Table 6-29 shows the range of gross market share of basement insulation from 837 participants to 2,327 participants. The majority of additional program participants are in the Avalon region.

Table 6-28: Gross Market Potential for Basement Insulation among All *takeCHARGE* Participants

Participants	Total	Avalon	Rest of Island	Labrador
Number of 2009-2012 *takeCHARGE* Participants	16,693	10,889	5,567	237
% of Participant Citing Additional Opportunities for Basement Insulation	14%	16%	10%	14%
Participants Who Reported Some Type of Additional Opportunity But Chose Not to Install		62%	71%	62%
Estimated Number of Participants with Additional Opportunities for a Measure but Chose not to Install	1,655	1,073	398	20
Max Number of Potential Participants - Basement Insulation	2,327	1,738	557	33
Potential % less those who Chose Not to Install - Basement Insulation	837	665	159	13

The estimate of remaining participant market potential for attic insulation followed a similar methodology. Additional attic insulation opportunities were slightly lower than for basement insulation; however, Avalon had the largest number of potential repeat participants. Table 6-29 shows the results of the analysis.

Table 6-29: Gross Market Potential for Attic Insulation Among *takeCHARGE* Participants

Participants	Total	Avalon	Rest of Island	Labrador
Number of 2009-2012 *takeCHARGE* Participants	16,693	10,889	5,567	237
% of Participants Citing Additional Opportunities for Basement Insulation	8%	8%	8%	11%
Estimated Number of Participants with Additional Opportunities for Basement Insulation	1,348	872	449	27
% of Participants Who Reported Some Type of Additional Opportunity But Chose Not to Install		62%	62%	71%
Estimated Number of Participants with Additional Opportunities for a Measure but Chose Not to Install	836	538	278	19
Maximum Number of Potential Participants for Basement Insulation	1,348	872	449	27
Maximum Number of Participants less those who Chose Not to Install	509	331	171	8

For non-participants, the analysis the market potential was based upon the number of non-participants who had insulation with R-values that did not meet the minimum requirements of the *takeCHARGE* programs. The number of non-participants who do not meet the minimum requirements set the upper bound for the market potential for this customer segment.

Table 6-30 shows the breakout of non-participants by geography and type of insulation.

Table 6-30: Number of Non-Participants with Insulation Levels Below *takeCHARGE* Minimum Requirements

Insulation Type	Non-participants	Total	Avalon	Rest of Island	Labrador
	Number of Eligible Non-participants Customers	89,224	51,681	30,574	6,969
Basement Wall	Percentage of Non-participants with R-values < R-18		17%	35%	50%
	Estimated Number of Non-participants with R-values < R-18	22,971	8,786	10,701	3,485
Basement Ceiling	Percentage of Non-participants with R-values < R-30		46%	64%	68%
	Estimated Number of Non-participants with R-values < R-30	48,080	23,773	19,567	4,739
Attic	Percentage of Non-participants with R-values < R-50 and < R-60 for Labrador		60%	64%	58%
	Estimated Number of Non-participants with R-values < R-50 and <R-60 for Labrador	54,618	31,009	19,567	4,042

Table 6-31 shows the distribution of non-participants that were aware of the *takeCHARGE* rebates and the percentage of those customers who did not install the measures despite the rebates.

Table 6-31: Non-Participant Awareness of Rebates

Non-Participants Awareness	Total	Avalon	Rest of Island	Labrador
% Aware of Insulation Rebates	57%	53%	56%	63%
% Aware of Measures but Did Not Install	5%	0%	10%	0%

The market share estimates are provided in Table 6-29. For each program, a range of market potential estimates were developed. The range was based upon the following assumptions:

- Maximum potential – assumes all non-participants who did not meet the program minimum requirements install the measures
- Mid-level potential – assumes only non-participants who were aware of the *takeCHARGE* program will install the measures
- Lower-level potential – assumes that some non-participants despite the awareness and need for the measure will choose not to install the measure.

Rest of Island had the largest market potential among the three regions. Also, in Labrador, all of the non-participants who were aware of the rebates installed basement wall and ceiling insulation outside of the program. It is important to remember that given the relatively small samples sizes for Labrador, the respondents may not be representative of the Labrador's customer population.

Table 6-32: Non-Participant Gross Market Potential Estimates

Insulation Type	Non-participants - Market Potential	Total	Avalon	Rest of Island	Labrador
Basement Wall	Max potential Non-participants	22,971	8,786	10,701	3,485
	All aware install	13,052	4,651	5,945	2,178
	Aware - % choose not to install	12,356	4,651	5,350	2,178
Basement Ceiling	Max potential Non-participants	48,080	23,773	19,567	4,739
	All aware install	27,319	12,586	10,871	2,962
	Aware - % choose not to install	25,861	12,586	9,784	2,962
Attic/Crawl Space	Max potential Non-participants	54,618	31,009	19,567	4,042
	All aware install	31,035	16,416	10,871	2,526
	Aware - % choose not to install	29,378	16,416	9,784	2,526

6.3.1.2 Gross Market Share – ENERGY STAR Windows

The market potential estimates for ENERGY STAR windows followed the same methodology as described for basement and attic insulation in the previous section. Table 6-33 shows the results for the participant population. Overall 27% of customers stated there were additional opportunities to install ENERGY STAR windows in their home. However, in Labrador's region the penetration of ENERGY STAR windows was extremely high among participants yielding very little remaining market potential for these customers.

Table 6-33: Market Potential for ENERGY STAR Windows Among Participants

Participants	Total	Avalon	Rest of Island	Labrador
Number of 2009-2012 takeCHARGE Participants	16,693	10,889	5,567	237
% of Participants Citing Additional Opportunities for ENERGY STAR Windows	28%	32%	22%	14%
Number of Participants Citing Additional Opportunities for ENERGY STAR Windows	4,734	3,475	1,225	34
% of Participants Who Reported Some Type of Additional Opportunity But Chose Not to Install	62%	38%	21%	3%
Participants Who Reported Some Type of Additional Opportunity But Chose Not to Install	1,588	1,335	252	1
Max Number of Potential Participants	4,734	3,475	1,225	34
Potential less % Chose Not to Install	3,146	2,140	973	33

Table 6-34 presents the results for the non-participants, as was the case with insulation, the Rest of Island had the highest market potential for ENERGY STAR windows among non-participants.

Table 6-34: Gross Market Share Non-Participants for ENERGY STAR Windows

Non-participants	Total	Avalon	Rest of Island	Labrador
Number of Eligible Non-participants Customers	89,224	51,681	30,574	6,969
% of Non-participants with Single Pane Windows	27%	28%	30%	14%
Number of Non-participant with Single Pane Windows	24,619	14,471	9,172	976
Aware of ENERGY STAR Windows	68%	68%	75%	54%
Aware of ENERGY STAR Windows but Did Not Install	9%	6%	10%	27%
Market Potential				
Max Potential - All Non-participants With Potential Opportunities Install (# Customers)	24,619	14,471	9,172	976
All Aware Non-participants Install (# Customers)	17,193	9,789	6,879	525
All Aware Non-participants Install Less % of Non-participants Who Did Not Install (# Customers)	15,768	9,219	6,163	368

6.3.1.3 Gross Market Share – Programmable and Electronic Thermostats

The gross market potential for programmable and electronic thermostats among participants and non-participants followed the same methodology as the basis for the insulation and ENERGY STAR window market estimates. Table 6-35 shows the results for the participant population. It is important to point out that none of the Labrador participants reported any additional opportunities for programmable or electronic thermostats. Also, the question asking the percentage of those respondents who would not install the measure, due to costs, inconvenience etc. was asked about all additional measures in general, not thermostats specifically.

Table 6-35: Market Potential for Programmable and Electronic Thermostats Among Participants

Participants	Total	Avalon	Rest of Island	Labrador
Number of 2009-2012 *takeCHARGE* Participants	16,693	10,889	5,567	237
% of Participants Citing Additional Opportunities for Thermostats	27%	26%	32%	0%
Number of Participants Citing Additional Opportunities for Thermostats	4,562	2,780	1,781	-
% of Participants Who Reported Some Type of Additional Opportunity But Chose Not to Install	62%	38%	21%	3%
Number of Participants Citing Additional Opportunities for Thermostats but Chose Not to Install	1,434	1,068	365	-
Maximum Potential if All Non-participants With Potential Install (# Customers)	4,562	2,780	1,781	-
All Non-participants With Potential Install Less Customers Who Chose Not to Install	3,128	1,712	1,416	-

The market potential for programmable and electronic thermostats among non-participants is shown in Table 6-36.

Table 6-36: Market Potential for Electronic and Programmable Thermostats Among Non-participants

Non-participants with Manual Thermostats	Total	Avalon	Rest of Island	Labrador
Standard Thermostats - average per home	7	8.4	6.2	6.9
Number of Eligible Non-participants Customers	89,224	51,681	30,574	6,969
% of Non-participants Citing Opportunities for Programmable/Electronic Thermostats	48%	53%	48%	17%
Number of Non-participants Citing Opportunities for Programmable/Electronic Thermostats	43,251	27,391	14,676	1,185
% of Non-participants Aware of Programmable/Electronic Thermostats	61%	56%	59%	83%
Number of Eligible Non-participants Customers Who Are Aware of Programmable/Electronic Thermostats	24,981	15,339	8,659	983
% of Non-participants Aware of Programmable/Electronic Thermostats but Did Not Install	21%	16%	30%	17%
Number of Non-participants Aware of Programmable/Electronic Thermostats but Did Not Install	5,219	2,454	2,598	167
Market Potential				
Max Potential - All Non-participants With Potential Opportunities Install (# Customers)	43,251	27,391	14,676	1,185
All Aware Non-participants Install (# Customers)	24,981	15,339	8,659	983
All Aware Non-participants Install Less % of Non-participants Who Did Not Install (# Customers)	18,946	12,885	6,061	816

6.3.2 Net Market Potential

6.3.2.1 Net Market Potential – *takeCHARGE* Insulation Program

The net market potential was calculated by applying the free ridership and spill over values at the program level. It is important to recognize that customers can chose to participate in multiple programs. The program net potential numbers refer to total number of potential participants. This is particularly important regarding the *takeCHARGE* Insulation program. For example, if a customer participates and installs attic insulation and basement wall insulation, they are count as two participants with savings associated with the individual measures in the program.

Table 6-37 shows the net market potential for the *takeCHARGE* Insulation Program. It was based upon the following assumptions:

- Two program level market potential sums were created:
  - Maximum market potential assumed all participants and non-participants with additional measure opportunities install the measure. This value serves as the upper bound.
  - Market potential based upon the proportion of participants and non-participants who were aware of the program less the number of participants and non-participants who were not likely to install the measure.
- The free ridership value used in the analysis was the free ridership value based upon the responses to the likelihood of installing the measure, the influence of the rebate on the timing of the installation and the effect of the rebate on the quantity of the measure installed.

- The spill over for participants valued applied in the analysis was an average of the responses to the two spill over questions regarding the influence of the presence of the program on the purchasing decisions of the participants.

Table 6-37 shows the results of the net market potential. The high level of spill over attributable to non-participants helped to narrow the gap between the gross and net market potential estimates. However, this market analysis focused on four years of program experience, a length of time that can be sufficient to move the baseline practices of customers toward the energy efficient alternatives. This relationship will be discussed in greater detail in Section 6.3 regarding the exit strategies for the *takeCHARGE* programs.

Table 6-37: Net Market Potential – *takeCHARGE* Insulation Program

	Total Program				Participant				Non-participant			
	Total	Avalon	Rest of Island	Labrador	Total	Avalon	Rest of Island	Labrador	Total	Avalon	Rest of Island	Labrador
Gross												
Max Number of Potential	129,344	66,177	50,841	12,326	3,675	2,609	1,006	60	125,669	63,568	49,836	12,265
Potential % less those who Chose Not to Install - Total	68,941	34,650	25,247	7,686	1,346	996	330	20	67,595	33,653	24,918	7,666
Net = Gross - FR + SO												
Max Number of Potential	122,642	62,466	48,377	11,799	2,103	1,493	576	34	120,539	60,973	47,801	11,765
Potential % less those who Chose Not to Install - Total	65,606	32,850	24,089	7,365	770	570	189	12	64,836	32,280	23,901	7,353

6.3.2.2 Net Market Potential – *takeCHARGE* ENERGY STAR Window Program

The methodology used to derive the net market potential for the *takeCHARGE* insulation program was applied to the ENERGY STAR window program. Similar to the insulation program, the significant spill over in the non-participant sector narrows the difference between gross and net for ENERGY STAR windows. Furthermore, the penetration of ENERGY STAR windows in Labrador among respondents was high and indicated very little remaining market potential. However, the sample sizes for this study were small and the results may not be indicative of the customer population. Table 6-38 shows the net market potential results.

Table 6-38: Net Market Potential – *takeCHARGE* ENERGY STAR Windows Program

	Total Program				Participant				Non-participant			
	Total	Avalon	Rest of Island	Labrador	Total	Avalon	Rest of Island	Labrador	Total	Avalon	Rest of Island	Labrador
Gross												
Max Number of Potential Participants	29,352	17,946	10,397	1,010	4,734	3,475	1,225	34	24,619	14,471	9,172	976
Potential less % Chose Not to Install	18,914	11,360	7,136	419	3,146	2,140	973	33	15,768	9,219	6,163	386
Net = Gross - FR + SO												
Max Number of Potential Participants	23,785	14,291	8,620	874	2,120	1,556	548	15	21,665	12,735	8,072	859
Potential less % Chose Not to Install	15,285	9,072	5,859	354	1,409	958	436	15	13,876	8,113	5,423	340

6.3.2.3 Net Market Potential – *takeCHARGE* Programmable/Electronic Program

Table 6-39 presents the net market potential in each of the region for the *takeCHARGE* Programmable and Electronic Thermostat Program. As discussed in the gross analysis, there is no remaining potential for thermostats in the Labrador region based upon the responses in this survey. However, we reiterate that the findings from this size of survey sample may not be indicative of the population of eligible customers in Labrador. Again, high awareness of the program and its influence on purchasing patterns among non-participants yielded high spill over rates which drove up overall market potential.

Table 6-39: Net Market Potential – *takeCHARGE* Programmable/Electronic Thermostats

	Total Program				Participant				Non-participant			
	Total	Avalon	Rest of Island	Labrador	Total	Avalon	Rest of Island	Labrador	Total	Avalon	Rest of Island	Labrador
Gross												
Max Number of Potential Participants	47,813	30,171	16,457	1,185	4,562	2,780	1,781	-	43,251	27,391	14,676	1,185
Potential less % Chose Not to Install	22,074	14,597	7,477	816	3,128	1,712	1,416	-	18,946	12,885	6,061	816
Net = Gross - FR + SO												
Max Number of Potential Participants	42,611	26,925	14,589	1,097	2,545	1,551	994	-	40,065	25,373	13,595	1,097
Potential less % Chose Not to Install	19,295	12,891	6,404	756	1,745	955	790	-	17,550	11,936	5,615	756

6.4 Recommendations for Potential Exit Strategies

When considering any program design changes many factors must be considered, including:

- Relationships with customers
- Relationship with vendors: contractors and retailers
- Cost effectiveness of current programs relative to re-designed and/or new programs
- Ensuring the energy efficiency strategy meets the internal and external corporate needs and goals

All of these are necessary, but not always equal in importance, to produce a 'successful' suite of energy efficiency programs.

This study has identified several key findings that can be used to help shape and build upon the Utilities' current suite of energy efficiency offerings. The evaluation period for this study was from 2009 through 2012, encompassing the program start-up phase through full scale implementation. Consequently, both program participants and non-participants have had a lengthy period of time to be exposed to the program. This was reflected in the high level of free ridership among customers and spill over among non-participants. Sufficient time has elapsed that has the exhaustion of market opportunities in some regions, such for thermostats and ENERGY STAR windows in Labrador, albeit the smallest of the three regions.

Furthermore, over the course of the past four years retailers and contractors have also changed their behaviour. Retailers have witnessed an increase in the demand for the *takeCHARGE* measures. They do not expect this trend to reverse and expect continued growth in the do-it-yourself market. Contractors have had time to incorporate many of the *takeCHARGE* minimum requirements into their standard offerings. While the contractors were entirely focused on the new construction market which is no longer eligible for the current *takeCHARGE* programs they were optimistic that the new construction sector will continue to thrive. The continued growth in the new construction market could lend itself to opportunities for new energy efficiency measures.

The results of this study indicate that the current *takeCHARGE* programs have affected customers' and vendors' purchasing practices and creating a more efficient baseline market. The Utilities are now at a point when they are considering expanding their energy efficiency and examining their current offerings. Several high level performance metrics of the programs can help signal consideration for exiting or modifying the current *takeCHARGE* programs, specifically:

- Market penetration rates: Industry experience has shown that when program measures reach market penetration rates of 30% to 40% that the program has impacted the efficiency of the baseline market and can be either phased out or modified to reach even higher efficiency levels or offer additional measure. Furthermore, the momentum of a program with its effect on retailer stocking patterns, contractor practices and customer behaviour can continue after the original program or offerings end.
- Free ridership and spill over: Free ridership values for rebate programs in excess of 40% often signal that the marketplace does not require rebates to achieve the desired savings. Similar values for spill over indicate that customers are willingly adopting the measures without needed rebate incentives.

In light of the findings in this study, the Utilities should continue to monitor and explore future offerings to residential homeowners and continue to capitalize on their relationships with builders, contractors and retailers.

7 IMPACT METHODOLOGY BEST PRACTICES

This section provides an overview of the best practices used for impact evaluations. It also includes a recommendation of the methodology for the *takeCHARGE* impact evaluation.

7.1 Gross Savings Methodologies

Over time, the evaluations of energy efficiency programs have yielded a set of best practices for conducting impact evaluations. The roster of available methods to estimate gross annual energy savings from energy efficiency programs is well established and their relative strengths, limitations, and best applications are well understood. Table 7-1 briefly summarizes this information. Part of the EM&V Planning process in an evaluation study includes identifying the most appropriate gross savings analysis method, based on the nature of the measures installed, the priority accorded the program by a utility and its stakeholders, and the quality and availability of program tracking system and billing data.

Table 7-1: Strengths, Limitations, and Best Applications of Alternative Methods to Estimate Annual Gross Savings

Method	Strengths	Limitations	Best Applications
Engineering Estimates: No Verification	• Very low cost • Quick deployment, timely results • Transparent – assuming well-documented deemed savings • Format consistent with planning assumptions & estimates	• Poor accuracy for measures where savings are closely related to site-specific conditions • Implicit assumptions concerning installation rates, replacement/retrofit, and other customer-specific actions	• Programs that account for low percentage of total portfolio gross savings • Programs that support relatively uniform measures, e.g.: CFLs, appliances
Engineering Estimates: Phone Verification Only	• Low cost • Quick deployment, timely results • Transparent • Consistent with planning methods • Supports adjustment of savings for some site and customer attributes • Can provide some valuable information for deemed savings estimates	• Relies on customer reports on variables on which they may have little or inaccurate recall: e.g. quantity installed, space heat type, hours of operation, size of space affected • Relies on assumptions for factors that customers cannot observe or report, e. g. part loads, equipment capacities	• Programs that do not account for very large percentages of total portfolio gross savings • Programs that support relatively uniform measures, e.g.: CFLs, appliances, some kinds of commercial lighting & HVAC.
Verification & Simulation Modeling	• Captures and explicates savings from projects with multiple, interacting components • Develops project specific baselines for new construction and major renovation • Can be used with data on population characteristics to project savings	• High cost • Operation of some simulation models difficult to explain • Results often highly sensitive to small changes in modeling assumptions • Exacting and inflexible data requirements	• Evaluations of new construction programs • Evaluation of programs that support large custom measures in C&I facilities)

Method	Strengths	Limitations	Best Applications
Billing Analysis	• Relatively inexpensive compared to M&V • Provides direct measurement of changes in energy use – intuitively credible for many audiences	• Not timely due to need for post-installation data from large sample • Requires cooperation of many parties to obtain data • Significant implementation risk to isolate the impact of specific program measures and/or activities	• Retrofit programs with relatively uniform measures, large participation, significant impact on baseline consumption in participant facilities • Residential new construction programs • Demand response programs (modeling of customer baselines – required whole-premise meters with 5 – 15 minute recording capability

7.2 Net-to-Gross Methodologies

Many methodological approaches can be found in the energy efficiency program evaluation literature for assessing attribution of savings to specific programs and quantifying net savings. These include:

- **Analysis of self-reports of program effects by targeted market actors (Self-reports).** This approach typically involves surveying samples of actual and/or potential program participants to elicit their assessment of the program's influence on their decisions to adopt energy efficiency measures or practices. The questions can be structured to probe the effect of the program on the timing, extent, and features of the projects in question, as well as the relative importance of the program versus other decision factors. The responses can then be processed to develop an attribution score using a transparent algorithm.
- **Quasi-experimental designs.** This approach uses well-established quasi-experimental social research designs to assess and quantify program attribution. Common strategies include cross sectional methods that compare the rate of measure adoption in an area or market segment not targeted by the program as a baseline for comparison to rates of adoption in the program area. The difference between the two can be viewed as the program's net effect. Pre-post designs that compare the rate of adoption before and after the program or policy intervention have also been applied, as have mixed pre-post/cross-sectional approaches. Statistical modeling is often used to apply retrospectively quasi-experimental approaches to datasets that describe the response of a group of market actors to a given program. For example analysis of variance and regression approaches implicitly invoke quasi-experimental designs by estimating program effects while controlling statistically for the effects of other participant attributes such as income, education, facility size, and so forth. Billing analysis to estimate energy savings from program participation is essentially a quasi-experimental approach. In some cases changes in billed consumption over time are compared for participant and non-participant groups. In other cases pooled time series/cross-sectional regression analysis is used to estimate the fixed effects of program participation.
- **Experimental designs.** Experimental design – by which we understand random assignment of eligible market actors to receive different program treatment -- provides one of the strongest approaches to assessing attribution. Random assignment directly addresses one of the most serious threats to validity that is inherent in other methods for attributing attribution, namely participant self-selection. Self-selection for participation in voluntary programs generally introduces bias to quasi-experimental analyses because participants often differ systematically from non-participants in factors that affect energy savings that cannot be directly observed and controlled for statistically. Experimental designs have been used recently to evaluate the effect of customer education and

information programs. This is a good application of experimental methods because individual participants can be randomly assigned to receive different messages and information products and the marginal cost of program delivery is very low. While evaluation team will look for opportunities to deploy random assignment strategies, we do not anticipate that they will have much application to this evaluation. Generally speaking, it is necessary to design the delivery of programs to support random assignment. This has been accomplished for demand response programs and for programs such as O Power where it is relatively easy to control the services that customers receive on line.

- **Price elasticity approaches, including conjoint analysis and revealed preference analysis.** In these two approaches, researchers assess the effect on changes in price on customer's likelihood of purchasing an energy-efficient product or service. The results of these assessments can then be combined with information on the actual effect of the program on the price participants paid for the product or service in question to estimate the effect of a program-related purchase incentive on the pace of sales. In the case of conjoint analysis, customers are asked to rank a structured set of hypothetical products that vary along a number of dimensions, including performance and price. In the revealed preference approach, purchasers are intercepted at the point of sale to gather information on product selection they actually made, its price, and other features.
- **Structured equation modeling.** Structured equation modeling applies a flexible form of path analysis to identify the most likely causal chain from program outputs such as messaging or incentives on the one hand to taking action to adopt an energy-efficient product of practice on the other. Generally, this type of modeling makes use of psychological theories of motivation and action to identify intermediate steps between program stimuli and the desired action. Calibration and testing of these models generally requires survey data from very large samples of market actors. To date, it has been used primarily to assess the effects of information programs.
- **Adoption process models.** One large class of diffusion theories and research rests on contagion models, where the mechanism of adoption is driven by social contact between individuals or firms that have already adopted the technology and those who have not. The most common formulation of the contagion approach is the "mixed influence" model, of which the well-known Bass curve is an example. These models take into account external influences on model adoption, such as prices of alternative products, as well as the pace and density of interactions among those who have adopted the product and those who haven't.

  The most well-known work in this field, Everett Rogers's *Diffusion of Innovations.* Rogers posits a five-stage sequence that individuals go through the adoption process: knowledge (awareness), persuasion, decision, implementation, confirmation (evaluation). These stages can be used to structure research on the effects of programs over time. For example, Reed et al. assessed the effects of a program by the Federal Energy Management Program (FEMP) to encourage federal agencies to make use of Energy Service Performance Contracting (ESPC) procedures to implement major energy efficiency improvements in their facilities. To do so, they used periodic surveys of agency employees in position to use ESPC in terms of their adoption stage. Changes in the distribution of the population of targeted employees among the adoption stages were used as indicators of program effects. [10]

- **Structured expert judging.** Structured expert judgment studies assemble panels of individuals with close working knowledge of the various causes for changes in the market, technology, infrastructure systems, markets, and political environments addressed by a given energy efficiency programs to estimate baseline market share and, in some cases, forecast market share with and without the program in place. Structured expert judgment processes employ a variety of specific

[10] Reed, John H., Gretchen Jordan, and Edward Vine. *Impact Evaluation Framework for Technology Deployment Programs. Washington D. C.:* U. S. Department of Energy, 2007.

techniques to ensure that the participating experts specify and take into account key assumptions about the specific mechanisms by which the programs achieve their effects. The Delphi process is the most widely known of this family of methods.

- **Historical Tracing: Case Study Method*.*** This method involves the careful reconstruction of events leading to the outcome of interest, for example, the launch of a product, the passage of legislation, or the completion of a large renewable energy project, to develop a 'weight of evidence' conclusion regarding the specific influence or role of the program in question on the outcome.

  Researchers use information from a wide range of sources to inform historical tracing analyses. These include public and private documents, personal interviews, and surveys conducted either for the study at hand or for other applications.

  Historical tracing relies on logical devices that have been well established historical studies, evaluation of other types of social programs, and legal argument. These include:

  - Compiling, comparing, and weighing the merits of narratives of the same set of events provided by individuals with different points of view and interests in the outcome.
  - Compiling detailed chronological narratives of the events in question to validate hypotheses regarding patterns of influence. This approach corresponds to quasi-experimental methods that make use of pre/post designs.
  - Positing a number of alternative causal hypotheses and examining their consistency with the narrative fact pattern. This step needs to be taken in every qualitative analysis.
  - Assessing the consistency of the observed fact pattern with linkages predicted by a logic model. This approach is particularly important when cross-sectional and pre/post comparisons are not feasible due to the nature of the program or the content of program records.

Table 7-2 summarizes the applicability of these attribution assessment techniques to the various types of energy efficiency programs.

Table 7-2: Applications of Attribution Assessment Methods by Type of Programs

◉ = High Applicability
○ = Secondary Applicability
--- = Little Applicability

Program Type	ANALYSIS APPROACH						
	Participant Self-reports	Quasi-Experiments	Experimental Designs	Price Elasticity	Adop-tion Process	Expert Judging	Case Studies
Equipment replacement incentive programs	◉	◉	---	○	○	---	○
Equipment and building retrofit incentive programs	◉	◉	---	○	○	---	◉
Renewable Energy Incentive Programs	◉	---	---	---	---	◉	◉
Information and Training Programs	◉	○	○	---	---	○	○
Codes & Standards	---	---	---	---	---	◉	◉

7.3 Recommended Impact Methodology for the *takeCHARGE* Programs

The *takeCHARGE* programs are ideal candidates for a billing analysis approach to estimating program impacts. Variation in baseline household consumption combined with a potentially high level of variation in participation levels at each household, could make this it difficult to develop program savings using a an engineering-based savings methodology. Billing analysis will capture the pre- program consumption of households and measure an average change in consumption after participating in the program. Furthermore, it will capture the interactive effects between measures for participants who installed multiple types of measures. The merits of the billing analysis relevant to the *takeCHARGE* programs are discussed below.

Billing analysis is often used by evaluators to measure the impact of residential gas and/or electric efficiency programs. In the performance of such an analysis, customer billing records are used to measure changes in consumption attributable to program actions. This approach is sometimes referred to as retrospective in nature because customers are generally evaluated a year after participation.

Direct examination of the utility bills of only those customers that had undertaken efficiency measures would not reflect other factors which may have had an effect on the size of the bills. To provide an accurate estimate of savings, it is often necessary to control for the effects of external, non-program variables. These variables can include weather effects, general economic trends, energy price effects, and specific factors that vary from customer to customer, e.g., occupancy and behavioral changes.

A billing analysis can be performed in one of two different ways both of which address these issues. We choose which billing analysis approach to use depending on the kind of program that is being evaluated.

- Site-level modeling fits a separate, simple regression to the pre- and post- installation data for each household. The difference in the weather normalized pre- and post-installation period consumption for each household is then combined in a second regression to capture the average impacts as a function of measures installed, household characteristics, etc.
- The pooled billing analysis follows a similar basic structure as the site-level approach but includes both pre- and post-installation periods for all participants in a single fixed effect regression model. The model controls for important site-level characteristics while directly estimating average pre-post changes across the included population.

Both approaches control for weather effects by including weather variables directly in the modeling process. With respect to the other variables the two approaches are quite different.

The site-level approach uses a comparison group to control for more general non-weather effects like economic trends and energy price effects. The challenge is identifying an appropriate comparison group that provides the required baseline consumption without causing bias in the estimates by using a comparison group that is not representative of the participant group. This approach is particularly good when a good comparison group is available, like a list of future participants in the same program

With the pooled billing analysis approach, participants effectively provide their own comparison group. Because households participate at different times through a program year, a majority of households are not participating in any particular month. The pooled approach takes advantage of this to control for non-weather effects within the model. This avoids the challenges of developing a separate comparison group.

Other strengths of the site-level approach arise out of the maximum flexibility to fit a model to each site's unique consumption. In theory, this approach can detect any kind of change in consumption that takes place in the post period including changing heating, cooling and base load consumption as well as the set points at which heating and cooling begin. On the other hand, the pooled approach maintains much of the flexibility of the site-level model and better leverages all of the data points to generate results with better precision.

For the billing analyses for the *takeCHARGE* programs, we recommend using a pooled time series cross-sectional model with the following form to estimate savings from installations of energy-efficient central air conditioners:

$$Y_{jt} = \mu_j + \varphi_t + \gamma_H HDD(\tau_H)_{jt} + \gamma_C CDD(\tau_C)_{jt} + \beta E_{jt} + \varepsilon_{jt},$$

where

Y_{jt} = therm per day for participant j during billing period t;

μ_j = participant j constant or fixed effect (=1 if participant j and =0 otherwise);

φ_t = billing period t constant or fixed effect (=1 if billing period t and =0 otherwise);

τ_H , τ_C = the optimal heating a cooling degree day bases

γ_H , γ_C , β = coefficients estimated by the regression;

$HDD(\tau_H)_{jt}$ = heating degree-days per day for the days included in billing period *t* for participant *j* and the weather station assigned to participant *j*;[1]

$CDD(\tau_C)_{jt}$ = cooling degree-days per day for the days included in billing period *t* for participant *j* and the weather station assigned to participant *j*;

E_{jt} = either 0 or tracking savings per day for the participant *j*, depending on whether billing period *t* occurs before or after the time of program participation. A more general model uses an indicator variable rather than the tracking savings; and

ε_{jt} = random error for participant *j* during billing period *t.*

In this model, the fixed effect term μ_j controls for characteristics that are specific to participant j across all billing periods. The fixed effect term φ_t controls for conditions affecting billing period t across all participants. Tracking savings per day E_{jt} is calculated simply by dividing tracking annual savings by the number of days in a year. If tracking savings is not available an indicator variable can be used. DNV GL will use a black-out period between the participation and nonparticipation periods to ensure that the characterization of participation status is correct for each observation included in the model.

In this model formulation the coefficient β can be interpreted as the gross savings realization rate. Thus, multiplying β by the total tracking system savings estimate will yield an estimate of pre-post consumption change due to the program.

This basic billing analysis model can control for additional important characteristics if such data is available for all household included in the billing model. Data from the program application will be useful in this respect if it is deemed complete and reliable. The inclusion of application characteristic data should improve the accuracy of the model.

[1] The base temperature for calculating heating degree days will be determined by examining the performance of the model in estimating actual usage with different base temperatures.

8 CONCLUSIONS AND RECOMMENDATIONS

This section summarizes the key findings and recommendations for the *takeCHARGE* programs. First section presents the findings from each of the key research components and tasks. Section 7.2 presents the overall recommendations for the *takeCHARGE* programs.

8.1 Summary of Findings

8.1.1 Process Evaluation Findings

Overall, three of the *takeCHARGE* programs were operating smoothly from the perspective of the program staff and retailer and vendors. Interviews with staff and vendors identified several key success factors for the program:

- The suite of *takeCHARGE* programs was cost effective and either met or exceeded all of its participation and savings goals in 2012.
- Many participants were repeat participants either within the same program or across programs.
- The turnaround time in processing rebates was short. This was corroborated by participants indicating a high level of satisfaction in the timeliness of their rebates, with 83% to 88% of participants either satisfied or very satisfied.
- Program staff recognized the critical role that retailers have in the programs. The used multiple recruiting and support mechanisms to solicit their involvement in the programs including, in store demonstrations, partnering on rebates, etc.
- Retailers and program staff both indicated that spiffs on products, particularly ENERGY STAR windows were very successful.

Both vendors and program staff identified several challenges and barrier to be addressed:

- The paper rebate form was cumbersome and confusing. The program staff is in the process of offering a streamlined on-line version of the rebate form to customers. Program staff also actively encourages retailers to help customers to complete the form. However, some retailers found it difficult to fill out for customers.
- Some retailers stated that they were still confused about what the qualifications requirements for the measures and suggested more one-on-one interaction with program staff.
- The marketing and outreach efforts were broad and did not target specific geographies or customer types. Tailoring materials to specific customer segments such as rural or Labrador customers would further improve program penetration.

8.1.1 Customer Survey Findings

Overall, participating customers had very positive responses to nearly all aspects of the program. Awareness of the *takeCHARGE* programs and the offerings was high among non-participants. The key findings included:

- The demographic differences between participants and non-participants were not significant. However, non-participants typically had smaller single family homes, less than 1,000 square feet compared to participants.
- Nearly 50% of participants cited saving energy as the primary motivation for participating. When asked about participating because the measure failed, 59% of window participants indicated that a reason for participating.
- Non-participants provided a wide range of reasons for not participating, such as personal preference, equipment did not qualify, etc., with no one response accounting for the majority.

- Knowing the amount of the insulation rebate before participating was an important program design feature to both participants (73%) and non-participants (63%).
- Overall, participants were very satisfied across all programs, ranging from 76% to 93%.
- Participants were generally happy with the rebate amounts; however 10% of insulation participants were either dissatisfied or very dissatisfied with their rebates.
- Participants were very satisfied with their retailers, 55% to 64% but stated they had a minimal influence on the type of equipment selected by the participant particularly for thermostats.

8.1.2 Program Partners

8.1.2.1 Contractors

The contractors interviewed for this study worked predominately in the new construction market. Given the construction boom in Newfoundland and Labrador, this was not surprising. Since having to comply with the new building code, the contractors stated that measures offered by the *takeCHARGE* programs were already incorporated into their standard design offerings. The contractors did provide some feedback and recommendations regarding the program marketing:

- Participating contractors particularly appreciate the opportunity of having a contact person at the utility to answer all their inquiries and support them with the programs' application.
- Add stickers to identify the program (similar to ENERGY STAR stickers for windows)
- Advertise in movie theatres citing the province's high movie attendance
- Include program materials when building approvals are issued

Perhaps the key finding from the contractor interviews was their perception and use of the program rebates. Overall, contractors in general have not expressed any particular need in promoting the programs' measures to their clients. Most contractors promoted the use of energy efficient features in their work without mentioning the *takeCHARGE* programs to their clients (unless the customer asks). Contractors often used energy efficiency as a selling point but did not mention the program to their customers to avoid customers ask for a lower selling price on the house or for concerns that the customer may apply for the rebates directly. Furthermore, the contractors and builders who included energy efficiency as part of their standard offerings viewed the *takeCHARGE* programs as an easy way to recover some of their investments in energy efficiency features that they would have made without the program. While the *takeCHARGE* programs are no longer offered to new construction customers due to the new building codes, contractors who include the energy efficiency options as their standard offerings for retrofit and remodelling projects are free riders.

Both participating and non-participating contractors expect the adoption of energy efficiency measures to continue in the future. Contractors identified a number of energy efficient products that will gain markets share in the coming years:

- Future home automation - smart thermostats
- On-demand hot water systems.

8.1.2.2 Retailers

In general, retailers were very satisfied, 90%, with the *takeCHARGE* programs but did offer several suggestions:

- Do more marketing / promotion of the program. A few retailers specifically asked for more in-store promotions.
- Increase or widen available customer incentives. Retailers offered a variety of responses within this topic; some simply wanted customers to get a larger incentive for an energy efficiency measure

purchase and installation; other respondents wanted additional measures incented within the program offerings.
- Help with the program rebate form process and/or move to online applications.

Retailers stated that program measures provide good value to the participants, specifically:

- For ENERGY STAR window with the rebate they are the same price as standard windows
- The *takeCharge* rebate offset increased costs of electronic and/or programmable thermostats compared to manual units

8.1.2.3 Market Analysis

The evaluation period for this study was from 2009 through 2012, encompassing the program start-up phase through full scale implementation. Consequently, both program participants and non-participants have had a lengthy period of time to be exposed to the program. This was reflected in the high level of free ridership among customers and spill among non-participants. Sufficient time has elapsed that has the exhaustion of market opportunities in some regions, such for thermostats and ENERGY STAR windows in Labrador's region, albeit the smallest to the three regions. Table 8-1 through Table 8-3 show the free ridership and spill over for the *takeCHARGE* programs.

Table 8-1: Free Ridership Estimates

Free-ridership Estimates	ENERGY STAR Windows	Programmable and Electronic Thermostats	Basement and Attic Insulation
Weighted: 50% likelihood/25% timing/25% quantity	62%	48%	53%
Only on Likelihood	53%	54%	64%
Only on Timing	82%	60%	59%
Only on Quantity	85%	78%	72%

Table 8-2: Participants Implementing Additional Measures and Spill Over Question Responses

Participants	Spill Over Weight	ENERGY STAR Windows	Insulation	Programmable/ Electronic Thermostats
Do you have additional measure opportunities?		n=71	n=67	n=86
Yes		35%	33%	24%
No		60%	64%	75%
Did your participation in the program influence your decision to make these additional measures?		n=25	n=22	n=21
Yes	100%	23%	44%	18%
No	0%	73%	56%	82%
Spill over Estimate		8%	14%	4%
Do you think you would have purchased and installed these additional measures if you had not participated in the program?		n=25	n=22	n=21
Yes	0%	87%	84%	91%
No	100%	13%	16%	9%
Spill over Estimate		5%	5%	2%

Table 8-3: Non-Participant Spill Over

Non-participants	Spill Over Weight	ENERGY STAR Windows	Insulation	Programmable/ Electronic Thermostats
Non-participants Who Installed Measures and Aware of Measures Offered in *takeCHARGE*		n=75	n=43	n=76
Yes		68%	57%	61%
No		28%	41%	33%
Based upon awareness, did you purchase measures that met the program requirements?		n=51	n=24	n=47
Yes	100%	73%	87%	66%
No	0%	18%	5%	34%
Spill over Estimate		0.50	49%	40%

8.1.2.4 Net Market Potential

This section summarizes the remaining market potential by program and geography. In all three programs, the high level of spill over attributable to non-participants helped to narrow the gap between the gross and net market potential estimates. However, this market analysis focused on four years of program experience, a length of time that can be sufficient to move the baseline practices of customers toward the energy efficient alternatives.

The net market potential was calculated for each *takeCHARGE* program as follows:

Net Market Potential = Gross Market Potential – Free ridership + Spill Over

It is important to recognize that customers can chose to participate in multiple programs. The program net potential numbers refer to total number of potential participants. This is particularly important regarding the *takeCHARGE* Insulation program. For example, if a customer participant installs attic insulation and basement wall insulation, they are count as two participants with savings associated with the individual measures in the program.

Tables 8-4 and 8-5 summarize the net market potential for the *takeCHARGE* Programs. The market potential for each program by geography is shown in Table 8-6 through Table 8-8. Net market potential was based upon the following assumptions:

- Two program level market potential sums were created:
  - Maximum market potential assumed all participants and non-participants with additional measure opportunities install the measure. This value serves as the upper bound.
  - Market potential based upon the proportion of participants and non-participants who were aware of the program less the number of participants and non-participants who were not likely to install the measure.
- The free ridership value used in the analysis was the free ridership value based upon the responses to the likelihood of installing the measure, the influence of the rebate on the timing of the installation and the effect of the rebate on the quantity of the measure installed.
- The spill over for participants valued applied in the analysis was an average of the responses to the two spill over questions regarding the influence of the presence of the program on the purchasing decisions of the participants.

The high level of spill over attributable to non-participants helped to narrow the gap between the gross and net market potential estimates. However, this market analysis focused on four years of program experience, a length of time that can be sufficient to move the baseline practices of customers toward the energy efficient alternatives. This relationship will be discussed in greater detail in Section 6.3 regarding the exit strategies for the *takeCHARGE* programs.

Table 8-4: Net Market Potential, Free Ridership and Spill Over– *takeCHARGE* Programs

	***takeCHARGE* Insulation Program**				***takeCHARGE* ENERGY Star Windows Program**				***takeCHARGE* Thermostat Program**			
	Total	**Avalon**	**Rest of Island**	**Labrador**	**Total**	**Avalon**	**Rest of Island**	**Labrador**	**Total**	**Avalon**	**Rest of Island**	**Labrador**
Free Ridership	53%				62%				48%			
Spill Over												
Participant	5%				5%				2%			
Non-Participant	49%				50%				40%			
Net Market Potential=Gross Market Potential - FR + SO												
Max Number of Potential	122,642	62,466	48,377	11,799	23,785	14,291	8,620	874	42,611	26,925	14,589	1,097
Potential % less those who Chose Not to Install - Total	65,606	32,850	24,089	7,365	15,285	9,072	5,859	354	19,295	12,891	6,404	756

Table 8-5: Net Market Potential – *takeCHARGE* Programs

	*take*CHARGE Insulation Program				*take*CHARGE ENERGY Star Windows Program				*take*CHARGE Thermostat Program			
	Total	**Avalon**	**Rest of Island**	**Labrador**	**Total**	**Avalon**	**Rest of Island**	**Labrador**	**Total**	**Avalon**	**Rest of Island**	**Labrador**
Gross												
Max Number of Potential	129,344	66,177	50,841	12,326	29,352	17,946	10,397	1,010	47,813	30,171	16,457	1,185
Potential % less those who Chose Not to Install - Total	68,941	34,650	25,247	7,686	18,914	11,360	7,136	419	22,074	14,597	7,477	816
Net=Gross - FR + SO												
Max Number of Potential	122,642	62,466	48,377	11,799	23,785	14,291	8,620	874	42,611	26,925	14,589	1,097
Potential % less those who Chose Not to Install - Total	65,606	32,850	24,089	7,365	15,285	9,072	5,859	354	19,295	12,891	6,404	756

Table 8-6: Net Market Potential – *takeCHARGE* Insulation Program

	Total Program				Participant				Non-participant			
	Total	**Avalon**	**Rest of Island**	**Labrador**	**Total**	**Avalon**	**Rest of Island**	**Labrador**	**Total**	**Avalon**	**Rest of Island**	**Labrador**
Gross												
Max Number of Potential	129,344	66,177	50,841	12,326	3,675	2,609	1,006	60	125,669	63,568	49,836	12,265
Potential % less those who Chose Not to Install - Total	68,941	34,650	25,247	7,686	1,346	996	330	20	67,595	33,653	24,918	7,666
Net = Gross - FR + SO												
Max Number of Potential	122,642	62,466	48,377	11,799	2,103	1,493	576	34	120,539	60,973	47,801	11,765
Potential % less those who Chose Not to Install - Total	65,606	32,850	24,089	7,365	770	570	189	12	64,836	32,280	23,901	7,353

The methodology used to derive the net market potential for the *takeCHARGE* insulation program was applied to the ENERGY STAR window program. Similar to the insulation program, the significant spill over in the non-participant sector narrows the difference between gross and net for ENERGY STAR windows. Furthermore, the penetration of ENERGY STAR windows in Labrador was extremely high exhausting the remaining market potential. Table 8-7 shows the net market potential results.

Table 8-7: Net Market Potential – *takeCHARGE* ENERGY STAR Windows Program

	Total Program				Participant				Non-participant			
	Total	**Avalon**	**Rest of Island**	**Labrador**	**Total**	**Avalon**	**Rest of Island**	**Labrador**	**Total**	**Avalon**	**Rest of Island**	**Labrador**
Gross												
Max Number of Potential Participants	29,352	17,946	10,397	1,010	4,734	3,475	1,225	34	24,619	14,471	9,172	976
Potential less % Chose Not to Install	18,914	11,360	7,136	419	3,146	2,140	973	33	15,768	9,219	6,163	386
Net = Gross - FR + SO												
Max Number of Potential Participants	23,785	14,291	8,620	874	2,120	1,556	548	15	21,665	12,735	8,072	859
Potential less % Chose Not to Install	15,285	9,072	5,859	354	1,409	958	436	15	13,876	8,113	5,423	340

Table 8-8 presents the net market potential in each of the region for the takeCHARGE Programmable and Electronic Thermostat Program. As discussed in the gross analysis, there is no remaining potential among participants for thermostats in the Labrador region based upon the responses in this survey. However, we reiterate that the findings from this size of survey sample may not be indicative of the population of eligible customers in Labrador. Again, high awareness of the program and its influence on purchasing patterns among non-participants yielded high spill over rates which drove up overall market potential.

Table 8-8: Net Market Potential – *takeCHARGE* Programmable and Electronic Thermostat Program

	Total Program				Participant				Non-participant			
	Total	Avalon	Rest of Island	Labrador	Total	Avalon	Rest of Island	Labrador	Total	Avalon	Rest of Island	Labrador
Gross												
Max Number of Potential Participants	47,813	30,171	16,457	1,185	4,562	2,780	1,781	-	43,251	27,391	14,676	1,185
Potential less % Chose Not to Install	22,074	14,597	7,477	816	3,128	1,712	1,416	-	18,946	12,885	6,061	816
Net = Gross - FR + SO												
Max Number of Potential Participants	42,611	26,925	14,589	1,097	2,545	1,551	994	-	40,065	25,373	13,595	1,097
Potential less % Chose Not to Install	19,295	12,891	6,404	756	1,745	955	790	-	17,550	11,936	5,615	756

8.2 Key Recommendations

Process and Program Design Recommendations

Overall, the suite of *takeCHARGE* programs was operating smoothly and delivered a high level of satisfaction to customers, vendors and to the Utilities. However, there were several areas of program design and delivery that could be modified or strengthened.

- Continue to seek and implement procedures to streamline the participation burden on customers and retailers. Offering an on-line solution should help to achieve this objective but program staff should continue to monitor and proactively modify processes as needed.
- Build upon the existing relationship with retailers and identify ways to provide more one-on-one support. Perhaps consider increasing the frequency that program staff directly contact retailers or offer a program 'hot line' for retailers with questions.
- Examine the technical potential opportunities for offering new emerging technologies including:
  - Future home automation - smart thermostats
  - On-demand hot water systems.

Market Analysis Recommendations

The central recommendation stemming from the market analysis was what the next steps should be for the current configuration of the *takeCHARGE* programs. The results of this study indicate that the current *takeCHARGE* programs have effected changes in customers' and vendors' purchasing practices and creating a more efficient baseline market. The Utilities are now at a point when they are considering expanding their energy efficiency and examining their current offerings

Going forward the Utilities should give important consideration to the strong awareness of energy efficiency among existing customers and market actors (e.g., contractors, builders and retailers) and identified opportunities to leverage the residential construction boom in the region. DNV GL recommends that the Utilities should explore the following program options.

Existing Homes Market

4. Assess a Whole House Program or Bundle Energy Efficiency Measures

   A broader more comprehensive approach to the existing home market is to take whole house approach to energy efficiency. A whole house program would incentivize participants to implement all eligible measures rather than just installing a single measure e.g., attic insulation. This type of program focuses on improving the overall energy performance of the home and can potential capture additional savings opportunities. An alternative to the whole house approach would be to bundle a smaller sub-set of measures together e.g., attic insulation, basement ceiling and basement wall insulation with programmable thermostats.

5. Explore the Feasibility of a Secondary Refrigeration and Freezer Recycling Program

   Secondary refrigerators and freezers are not typically energy efficient. Secondary refrigerators are often the former primary refrigerators that have been replaced by homeowners with newer more efficient models. Secondary refrigerators that are in non-space conditioned areas (e.g., garages and basements) and are often fairly empty most of the year operate less efficiently. Utilities in the United States have implemented refrigeration and freezer recycling programs that remove the units from the grid. In these programs, refrigerators and freezers are picked up at the customer's home free of charge by a utility sanctioned contractor, the customer receives a rebate and the units are then disposed of by the contractor in an environmentally appropriate manner. The Utilities should explore the penetration of secondary refrigerators and freezers in their service territory to assess the applicability of this type of program.

6. Consider Including Water Saving Measures

   Residential water saving measures including low flow shower heads and faucet aerators may provide a low cost way to reduce the energy consumption of water heaters. These could be coupled as part of a whole system or bundled program.

New Construction Market

3. Consider Implementing ENERGY STAR New Homes Program

   There has been a large influx of income into the Utilities' region which has resulted in boom in the residential construction market with new larger homes being built. The implementation of the National Energy Code of Canada has helped to established more rigorous energy efficiency standards in new homes. The code incorporates many of the measures included in the current *takeCHARGE* programs. However, there are opportunities to obtain additional savings in new homes. Offering an ENERGY STAR New Homes Program is one option to push the energy savings opportunities further. The ENERGY STAR New Homes program focuses on the total performance of the home by establishing efficiency requirements for shell measures and building practices that exceed building code requirements and by requiring the implementation of ENERGY STAR appliances. This type of program is quite different than the Utilities' existing rebate programs and will require training contractors and buildings on the ENERGY STAR implementation and performance criteria. Also, the program will require inspection and certification processes.

4. Examine the Feasibility of Implementing a R2000 Compliant Program

   Another option to consider for the new construction market is to take the energy savings to an even higher level is to design and implement a program that meets the performance criteria set forth in the R2000 program. As with the ENERGY STAR New Homes Program, the R2000 program would require training contractors and builders on the R2000 requirements and would need to include inspection and certification processes to determine if the home meets the standards of the program.

9 APPENDIX A – *TakeCHARGE* Participant Survey

NEWFOUNDLAND/LABRADOR
RESIDENTIAL PARTICIANT CUSTOMER SURVEY
DRAFT (CATI)

1 INTRODUCTION

[TARGET: Trying to reach current owner or co-owner of home. If co-owners, respondent should have been involved in renovation decisions].

LEAD-IN: Hello, my name is _________ and I am calling from Ryan Research on behalf of Newfoundland Power and Newfoundland and Labrador Hydro. The Utilities are conducting a study to help improve their residential energy efficiency programs.

[IF REQUESTED]: This study is sponsored by Newfoundland Power and Newfoundland and Labrador Hydro. For contact from the Utilities, please call <name>, <utility>, at <phone number>]

May I speak with the owner of your home?

- If owner is not home: record best time to call back.
  CALL BACK DATE/TIME: ________________________________
- If owner lives elsewhere and/or has diff. phone #: record name, phone#, best time to call.

[REPEAT LEAD-IN FOR RESPONDENT IF NEEDED]

We are conducting a study of households who have recently completed renovations to their homes. takeCHARGE will use this information to help improve programs to benefit their residential customers.

I want to assure you that this is not a sales call and your answers will be strictly confidential.

[CONTINUE ON TO SCREENER]

2 SCREENER

S1. I'd like to first confirm, are you the owner or co-owner of [ADDRESS]?

1. Yes
2. No
   -97. DK
   -98. REF

IF YES ➔ GO TO S2
IF NO➔ - Ask for Owner's name and phone # and best time to call.
- If Contact has no connection to Address, record disposition, thank & terminate.
IF REFUSED ➔ Thank and Terminate

S2. Is your house a … **[READ LIST]**

1. Single-family home, detached from other homes
2. Attached home (e.g., A, townhouse or row house attached to other units)
3. A mobile home
4. (Other________[SPECIFY]) ➔ **Thank and Terminate**
-97. (Don't know) ➔ **Thank and Terminate**
-98. (Refused) ➔ **Thank and Terminate**

S3. According to our records, since 2009, you received a rebate from [takeCHARGE] for one or more of the following energy efficiency measures. Is this correct? **[READ LIST]**

1. Installing ENERGY STAR windows
2. Adding insulation in the basement or attic
3. Adding a programmable and high performance electronic thermostat?
-97. (Don't know) ➔ **Thank and Terminate**
-98. (Refused) ➔ **Thank and Terminate**

3 PROJECT DETAILS

Next, I'd like to ask you some questions about the renovation project(s) you completed.

[REPEAT QUESTION FOR EACH TYPE OF MEASURE FOR WHICH A REBATE WAS RECEIVED]

You indicated earlier that you had purchased <ENERGY STAR windows/insulation/thermostat> since 2009.

PD1. In which year did you install the <ENERGY STAR windows/insulation/thermostat>?

Year	PD1
2012	1
2011	2
2010	3
2009	4
Don't know	-98
Refused	-99

PA1A. Who installed the <ENERGY STAR windows/insulation/thermostat>?

Member of household	1
Friend or family member outside of household	2
HVAC contractor	3
WindowRetailer or Specialty Store	4
Electrician	5
[Other] (Specify:_______________________________________)	4
[Don't know]	-97
[Refused]	-98

PD2. What was your main reason for installing <ENERGY STAR windows/insulation/thermostat>? [CODE RESPONSE INTO PRECODES BELOW, ACCEPT ONE ONLY, PROBE FURTHER FOR MAIN PURPOSE IF RESPONDENT MENTIONS > 1].

PD3. What were some of the other reasons for installing <ENERGY STAR windows/insulation/thermostat>? [READ LIST EXCLUDING PD2 RESPONSE FOR PD3, ACCEPT MULTIPLES FOR PD3]

Reason	PD2	PD3
Replace old or failing equipment	1	1
Add or reconfigure living space	2	2
Reduce energy use or costs	3	3
Repair or replace exterior of the house	4	4
Improve comfort [e.g. stop drafts; keep cooler in summer or warmer in winter]	5	5
Qualify for program rebates	6	6
Increase the value of the home	7	7
Other (Specify) ______________________________	8	8
Don't know	-98	-98
Refused	-99	-99

PD4. Which of the following ranges contains the total cost of the measures installed under the program?
[READ LIST. ACCEPT ONE ONLY.]

Project Cost	PD4
Less than $500	1
Between $500 and $1000	2
Between $1,000 and $2,500	3
Between $2,500 and $5,000	4
Between $5,000 and $7,500	5
$10,000 or more	6
Don't know	-98
Refused	-99

PD5. Did you use some form of credit, such as a credit card or loan to pay for the measure?

Yes	1	PD6A
No	2	PD7
Don't know	-98	PD7
Refused	-99	PD7

PD6A. How did you finance the purchase? [READ LIST. RANDOMIZE. OTHER IS ALWAYS LAST. ACCEPT MULTIPLES.] CODE 1 = YES; 2 = NO; -98 = DON'T KNOW; -99 = REFUSED.

Financing type	**Code**
Credit card	
Second mortgage or home equity line of credit	
Consumer loan from bank or finance company	
Installment loan from contractor or equipment vendor	
Other (Specify) ____	
Don't know	-98
Refused	-99

PD7. Are there additional opportunities to install [ENERGY STAR Windows, more insulation, more programmable thermostats] in your home? [DO NOT READ. ACCEPT MULTIPLES.]

Measure	**PD4**
Attic insulation	1
Basement insulation	2
ENERGY STAR windows	3
Programmable thermostat or other heating/cooling controls	4
Other (Specify) ______________________	5
Don't know	-98
Refused	-99

PD 8. What was the main reason you did not install those measures as part of the project for which you received a rebate from [takeCHARGE? [DO NOT READ]

PD 9. Were there other reasons? [DO NOT READ, ACCEPT MULTIPLES]

Reason	PD8	PD9
Could not afford to do more/ran out of money	1	1
Did not think the savings justified the costs	2	2
Did not fit with other aspects of the overall project	3	3
Was not convenient to do the measure at that time	4	4
No additional reasons	5	5
The rebate application was complicated/lengthy to complete	6	6
Other (Specify) ______________________	7	7
Don’t know	-98	-98
Refused	-99	-99

Now, I would like to ask you about the importance of rebates offered for basement and attic insulation under the takeCHARGE program.

PD10. How important is it to know the exact amount of the insulation before you would participate in the program?

Very important	1	PD10
Somewhat important	2	PD10
Neutral	3	PD10
Somewhat unimportant	4	PD10
Very unimportant	5	PD10
Don’t know	-98	PD10
Refused	-99	PD10

PD11. Does knowing the exact amount of insulation rebate make you more likely to participate in the takeCHARGE program?

Yes	1	CR1
No	2	CR1
Don’t know	-98	CR1
Refused	-99	CR1

4 ROLE OF THE CONTRACTORS AND RETAILERS

I'd like to ask you a few questions about the <retailer or contractor> you contacted about purchasing or installing <ENERGY STAR windows/insulation/thermostat>.

CR1. Were you aware of the takeCHARGE rebates before you contacted a contractor or retailer about purchasing and installing your <ENERGY STAR windows/insulation/thermostat>?

1	[Yes]	CR2
2	[No]	CR2
-97	[Don't know]	CR2
-98	[Refused]	CR2

CR2. Before speaking to your contractor or retailer, did you have any type or model of <ENERGY STAR windows/insulation/thermostat> in mind?

1	[Yes]	CR2A
2	[No]	CR3
-97	[Don't know]	CR3
-98	[Refused]	CR3

CR2A. What type or model of <ENERGY STAR windows/insulation/thermostat> did you have in mind? [READ. ALLOW MULTIPLE RESPONSES]

1	[Something similar to what he had before]	CR3
2	[An energy-efficient model]	CR3
3	[Reliable model/ one with good warranty]	CR3
4	[A certain brand]	CR3
5	[An inexpensive model	CR3
6	[Other] [RECORD RESPONSE]	CR3
-97	[Don't know]	CR3
-98	[Refused]	CR3

CR3. What role, if any, did your contractor or retailer play in helping you select the <ENERGY STAR windows/insulation/thermostat>that you installed?
[DON'T READ. ALLOW MULTIPLE RESPONSES]

1	[No role]	CR4
2	[Provided cost estimates/bids]	CR4
3	[Recommended specific equipment/brand]	CR4
4	[Recommended high efficiency model]	CR4
5	[Identified equipment eligible for rebates]	CR4
6	[Informed us about [ttakeCHARGE]] program	CR4
7	[Encouraged us to replace windows when we did]	CR4
8	[Helped estimate energy savings]	CR4
9	[Provided info about comfort levels of different windows]	CR4
10	[Provided info about reliability of different windows]	CR4
11	[Helped estimate Return-on-Investment (ROI) or payback]	CR4
12	[Other] [RECORD RESPONSE]	CR4
-97	[Don't know]	CR4
-98	[Refused]	CR4

CR4. What features, if any, of the <ENERGY STAR windows/insulation/thermostat> that you selected did your contractor or retailer emphasize? [DON'T READ. ALLOW MULTIPLE RESPONSES]

1	[No features]	CR4A
2	[Cheap, low price]	CR4A
3	[Energy efficient]	CR4A
4	[Quiet]	CR4A
5	[Good warranty/reliability]	CR4A
6	[Certain brand]	CR4A
7	[Easy to use]	CR4A
8	[Other] [RECORD RESPONSE]	CR4A
9	[It was endorsed by the utility]	
-97	[Don't know]	CR4A
-98	[Refused]	CR4A

CR5. Did the contractor or retailer present you with multiple models to choose from?

1	[Yes]	CR6
2	[No]	CR7
-97	[Don't know]	CR7
-98	[Refused]	CR7

CR6. Did the contractor or retailer present you with price quotes for these various options?

1	[Yes]	CR7
2	[No]	CR7
-97	[Don't know]	CR7
-98	[Refused]	CR7

CR7. Did you feel that the energy-efficient options were significantly more expensive than the alternatives?

1	[Yes]	CR8
2	[No]	CR8
-97	[Don't know]	CR8
-98	[Refused]	CR8

CR8. What was the most important reason you chose to go with the <ENERGY STAR windows/insulation/thermostat>?
[DON'T READ OPTIONS. ACCEPT ONE ONLY.]

1	[Our contractor recommended it]	CR9
2	[We wanted to reduce our utility/energy bills]	CR9
3	[We wanted a rebate from [takeCHARGE]	CR9
4	[We wanted to help the environment/ Reduce global warming]	CR9
5	[Other] [RECORD RESPONSE]	CR9
-97	[Don't know]	DAT0
-98	[Refused]	DAT0

CR9. Were there other reasons? [DO NOT READ. ACCEPT MULTIPLES].

1	[Our contractor recommended it]	DAT0
2	[We wanted to reduce our utility/energy bills]	DAT0
3	[We wanted a rebate from [takeCHARGE	DAT0
4	[We wanted to help the environment/ Reduce global warming]	DAT0
5	[Other] [RECORD RESPONSE]	DAT0
-97	[Don’t know]	DAT0
-98	[Refused]	DAT0

5 DIRECT ATTRIBUTION

DAT0. **Next, I'd like to know about the effect, if any, that the program had on your decision to install <ENERGY STAR windows/insulation/thermostat>. How likely is it that you would have installed the <ENERGY STAR windows/insulation/thermostats> if you had not received the rebate from the utility program? Would you say that it was "very likely," "somewhat likely," "not very likely," or "not at all likely"?**

1	Very unlikely	DAT1a
2	Not very likely	DAT1a
3	Somewhat likely	DAT1a
4	Or very likely	DAT1a
-97	[Don't know]	DAT1a
-98	[Refused]	DAT1a

DAT1a. **I'd like to know about the effect, if any, that the rebate from the program had the timing of your purchase of <ENERGY STAR windows/insulation/thermostats>. Without the rebate would you have purchased the <ENERGY STAR windows/insulation/thermostat>at the same time, earlier, later, or never?**

1	At the same time	DAT1a_conf_1
2	Earlier	DAT1a_conf_1
3	Later	DAT1a_conf_1
4	Never	DAT1a_conf_1
-97	[Don't know]	DAT1a_conf_1
-98	[Refused]	DAT1a_conf_1

DAT1a_conf1. **[IF DAT0 = 1 very likely AND DAT1a = 1 same time ELSE SKIP TO DAT1a_conf2] I'd just like to confirm, you said that without the program, you were very unlikely to purchase an <ENERGY STAR windows/insulation/thermostat> at all and, the program did not affect the timing of your purchase? Is that correct?**

1	[Yes]	DAT1b
2	[No]	DAT0
-97	[Don't know]	DAT0
-98	[Refused]	DAT0

DAT1a_conf2. [IF DAT0 = 4 very likely AND DAT1a = 4 never ELSE SKIP TO DAT1b] **I'd just like to confirm, you said that without the program, you were very likely to purchase <ENERGY STAR windows/insulation/thermostat>? Is that correct?**

1	[Yes]	DAT1b
2	[No]	DAT0
-97	[Don't know]	DAT0
-98	[Refused]	DAT0

DAT1b. [IF DAT1a ≠ 3, SKIP TO DAT2a] **Approximately how many months later?**

	[RECORD # months]	DAT2
-97	[Don't know]	DAT2
-98	[Refused]	DAT2

DAT2. **Finally, I'd like to know about the effect, if any, that program incentives and services had on the quantity of <ENERGY STAR windows/insulation/thermostat> that you purchased. Without the program would you have purchased the same amount of <ENERGY STAR windows/insulation/thermostat> as you did, <fewer ENERGY STAR windows/less insulation/fewer thermostats> than you did, more <ENERGY STAR windows/insulation/thermostat>, or none at all?**

1	[Same number/size]	DAT4
2	[Fewer/smaller]	DAT3a
3	[More/larger]	DAT3a
4	[None at all]	DAT4
-97	[Don't know]	DAT4
-98	[Refused]	DAT4

6 SPILLOVER

SO1 Did you implement any additional energy efficiency measures at this home since your participation in the program that did not receive incentives through the takeCHARGE programs?

Yes	1	SO1a
No	2	SO2
Don't Know	-98	SO2
Refused	-99	SO2

SO1a [If SO2=YES] What equipment has been installed?
[For each equipment mentioned, record name of equipment and quantity of equipment]

Measure: ________________________	
Quantity: ________________________	
Don't Know	-98
Refused	-99

SO2 Did your participation in the <ENERGY STAR windows/insulation/thermostat> program influence your decision to make these additional improvements?

Yes	1
No	2
Don't Know	-98
Refused	-99

SO2a [If SO2=No] What prompted you to install this equipment?

Record response: ____	
Don't Know	-98
Refused	-99

SO2b [If SO2=YES] What aspects of the program influenced your decision to install them?
[Probe: energy savings, increased comfort etc.]

Record response: ____	
Don't Know	-98
Refused	-99

SO3 Do you think you would have purchased and installed these additional measures if you had not participated in the <ENERGY STAR windows/insulation/thermostat> program?

Yes	1
No	2
Don't Know	-98
Refused	-99

SO4 Since participating in the utility program, have you made any changes in the way you manage energy use at home?

Yes	1
No	2
Don't Know	-98
Refused	-99

SO4a [If SO4=Yes] Please describe those changes?

Record response: ______________________________	
Don't Know	-98
Refused	-99

SO5b Did your participation in the <ENERGY STAR windows/insulation/thermostat> program influence your decision to make these additional improvements?

Yes	1
No	2
Don't Know	-98
Refused	-99

7 PROGRAM SATISFACTION

Next I have some questions about how satisfied you are with different aspects of the takeCHARGE <ENERGY STAR windows/insulation/thermostat> Program.

For all of these questions, use a 5 point scale where 5 means very satisfied and 1 means very *dis*satisfied

[REPEAT QUESTION FOR EACH TYPE OF REBATE EQUIPMENT INSTALLED]

PS1. How satisfied or dissatisfied are you with the <ENERGY STAR windows/insulation/thermostat> you had installed?

Not at all satisfied	1	PS1a
	2	PS1a
	3	PS1a
	4	PS2
Very satisfied	5	PS2
Don’t know	-98	PS2
Refused	-99	PS2

PS1a. [IF PS1 = 1 OR 2] **Why do you say that?**

RECORD VERBATIM	
Don’t know	-98
Refused	-99

PS2. How about the dollar amount of the rebate? [REPEAT SCALE IF NECESSARY]

Not at all satisfied	1	PS2a
	2	PS2a
	3	PS2a
	4	PS3
Very satisfied	5	PS3
[Don’t know]	-98	PS3
[Refused]	-99	PS3

PS2a. [IF PS2 = 1 OR 2] **Why do you say that?**

RECORD VERBATIM	
Don't know	-98
Refused	-99

PS3. How satisfied were you with the timeliness of the rebate payment?

Not at all satisfied	1	PS3a
	2	PS3a
	3	PS3a
	4	PS4
Very satisfied	5	PS4
[Don't know]	-98	PS4
[Refused]	-99	PS4

PS4. How about the rebate application forms and other paperwork?

[Did not fill out rebate paperwork]	1	PS5
Not at all satisfied	2	PS4a
	3	PS4a
	4	PS4a
	5	PS5
Very satisfied	-98	PS5
[Don't know]	-99	PS5
[Refused]		PS5

PS5. [If PA3=3; Else skip to PS6] How satisfied or dissatisfied are you with the retailer or contractor you contact regarding your <ENERGY STAR WINDOWS/INSULATION/Thermostat>

Not at all satisfied	1	PS5a
	2	PS5a
	3	PS5a
	4	PS6
Very satisfied	5	PS6
[Don't know]	-98	PS6
[Refused]	-99	PS6

PS5a. [IF PS5 = 1 OR 2] **Why do you say that?**

RECORD VERBATIM	
Don't know	-98
Refused	-99

PS6. **Since having your new <ENERGY STAR windows/insulation/thermostat>have you noticed any reductions in your energy bills?**

Yes	1
No	2
Don't know	-98
Refused	-99

8 DEMOGRAPHICS

We're almost finished. I have just a few more questions to make sure we are getting a representative sample of Newfoundland Power and Newfoundland and Labrador Hydro customers.

D1. Which of the following best describes your age? Would you say…
[READ LIST.]

1	Less than 18 years old,	D2
2	18 to 24	
3	25 to 34	
4	35 to 44	
5	45 to 54	
6	55 to 64 or	
7	65 or older	
-98	[Refused]	
-99	[Don't know]	

D2. What is the highest level of education you have completed?
[DO NOT READ LIST. PROMPT IF NECESSARY.]

1	[No schooling]	D3
2	[Less than high school]	
3	[Some high school]	
4	[High school graduate or equivalent (e.g., GED)]	
5	[Trade or technical school]	
6	[Some college]	
7	[College degree]	
8	[Some graduate school]	
9	[Graduate degree]	
-98	[Refused]	
-99	[Don't know]	

D3. What was your annual household income from all sources in 2012, before taxes? Please stop me when I reach the category that best describes your household's income. Would you say…
[READ LIST]
[IF NECESSARY: "This information is confidential and will only be used for the purpose of characterizing study respondents."]

1	Less than $20,000 per year,	D4
2	20 to less than $40,000,	
3	40 to less than $60,000,	
4	60 to less than $80,000,	
5	80 to less than $100,000,	
6	100 to less than $150,000, or	
7	$150,000 or more?	
-98	Refused	
-99	Don't know	

D4. Including yourself, how many people live in your home more than nine months of the year?

1	1	D5
2	2	D5
3	3	D5
4	4	D5
5	5	D5
6	6	D5
7	>6	D5
-98	Refused	D6
-99	Don't know	D6

D5. For the people living in your home more than nine months a year, how many are in each of the following age groups?

[READ AND RECORD RESPONSES]

1	< 18 years old	D6
2	19 to 25 years old	D6
3	25 to 40 years old	D6
4	41 to 50 years old	D6
5	51 to 65 years old	D6
6	>65 years old	D6
-98	Refused	D6
-99	Don't know	D6

D6. What year was your home built?

Record number ________________	1	D7
Don't know	-98	D7
Refused	-99	D7

D7. What is the square footage of your home?

1	Less than 90 square meters	D8
2	90 – 150 square meters	
3	150 – 190 square meters	
4	190 – 250 square meters	
5	250 – 300 square meters	
6	More than 300 square meters	
-98	Refused	
-99	Don't know	

D8. How many stories is your home?

1	1	END_0 or 1
2	2	
3	3	
4	>3	
-98	Refused	
-99	Don't know	

9 WRAP UP

END_0. **Okay, great. Today we're trying to reach customers who have <u>not</u> participated in any of BWL's programs, so I don't have any more questions for you today. Thank you for your time.**

END_1. **Those are all of the questions I have for you today. Thank you for your time.**

These are all the questions I have for you today. Thank you for your time and cooperation.

10 APPENDIX B - *TakeCHARGE* Non-Participant Survey

NEWFOUNDLAND/LABRADOR
RESIDENTIAL NON-PARTICIANT CUSTOMER SURVEY
FINAL (CATI)

1 INTRODUCTION

[TARGET: Trying to reach current owner or co-owner of home. If co-owners, respondent should have been involved in renovation decisions].

LEAD-IN: Hello, my name is _________ and I am calling from Discovery Research on behalf of Newfoundland Power and Newfoundland and Labrador Hydro. The Utilities are conducting a study to help improve their residential energy efficiency programs.

[IF REQUESTED]: This study is sponsored by Newfoundland Power and Newfoundland and Labrador Hydro. For contact from the Utilities, please call <name>, <utility>, at <phone number>]

May I speak with the owner of your home?

- If owner is not home: record best time to call back.
  CALL BACK DATE/TIM E: _________________________________
- If owner lives elsewhere and/or has diff. phone #: record name, phone#, best time to call.

[REPEAT LEAD-IN FOR RESPONDENT IF NEEDED]

I want to assure you that this is not a sales call and your answers will be strictly confidential.

[CONTINUE ON TO SCREENER]

2 SCREENER

S1. I'd like to first confirm, are you the owner or co-owner of your home?

Yes	1	IF YES ➔ GO TO S2
No	2	IF NO➔ - Ask for Owner's name and phone # and best time to call. - If Contact has no connection to Address, record disposition, thank & terminate.
Don't know	-98	**Thank and Terminate**
Refused	-99	**Thank and Terminate**

S2. Is the primary fuel used to heat your home electricity?

Yes	1	IF YES ➔ GO TO S3
No	2	**Thank and Terminate**
Don't know	-98	**Thank and Terminate**
Refused	-99	**Thank and Terminate**

S3. Since 2009, have you participated in Newfoundland Power or Newfoundland and Labrador Hydro's takeCHARGE programs ?

Yes	1	**Thank and Terminate**
No	2	IF NO➔ PA1
Don't know	-98	**Thank and Terminate**
Refused	-99	**Thank and Terminate**

S4. Is your house a … [READ LIST]

Single Family home	1	S5
Attached home (e.g., A, townhouse or row house attached to other units)	2	S5
A mobile home	3	S5
Other (specify) _________	4	**Thank and Terminate**
Don't know	-98	**Thank and Terminate**
Refused	-99	**Thank and Terminate**

S5. Have you or anyone in your household purchased attic or basement insulation since 2009?

Yes	1	S6
No	2	S6
Don't know	-98	S6
Refused	-99	S6

S6. Have you or anyone else in your household purchased a new thermostat since 2009?

Yes	1	S7
No	2	S7
Don't know	-98	S7
Refused	-99	S7

S7. Have you or anyone in your household purchased new windows since 2009?

Yes	1	PA1
No	2	PA1
Don't know	-98	PA1
Refused	-99	PA1

3 PROGRAM AWARENESS

PA1 Prior to this call, were you aware of the Newfoundland Power and Newfoundland and Labrador Hydro's takeCHARGE programs that provide rebates for energy efficient equipment?

Yes	1	PA2
No	2	PA5
Don't know	-98	PA5
Refused	-99	PA5

PA2. What types of energy efficient equipment discounts or energy related services are you aware takeCHARGE offers?

[DO NOT READ LIST. ACCEPT MULTIPLE ANSWERS]

None	0	PA5
Basement insulation	1	PA3
Attic insulation	2	PA3
ENERGY STAR Windows	3	PA3
Programmable thermostats	4	PA3
Electronic thermostats	5	PA3
Other	6	PA3
Don't know	-98	PA5
Refused	-99	PA5

PA3. Why haven't you participated in any of the takeCHARGE programs?

[ALLOW MULTIPLE RESPONSES. DO NOT READ RESPONSES]

Did not know about rebates	1
Did not purchase eligible equipment / no opportunity	2
Did not qualify for rebates	3
Didn't find out about program until too late	4
My energy/utility bills are not that high	5
No time	6
Personal preference	7
Rebates not big enough to justify hassle/paperwork	8
Rebates not enough to justify high initial cost of eligible equipment	9
Was going to buy equipment anyway	10
Don't know	-98
Refused	-99

[ASK IF S5=1 AND PA1=1, ELSE GO TO IS1]

PA4. How important is it to know the exact amount of the insulation rebate you would be eligible for under the takeCHARGE program?

Very important	1	PA5
Somewhat important	2	PA5
Neutral	3	PA5
Somewhat unimportant	4	PA5
Very unimportant	5	PA5
Don’t know	-98	PA5
Refused	-99	PA5

PA5. If you did know the amount of insulation rebate, would you be more likely to participate in the takeCHARGE program?

Yes	1	IS1
No	2	IS1
Don’t know	-98	IS1
Refused	-99	IS1

4 INSULATION

[ASK ALL RESPONDENTS]

Next, I would like to ask a few questions about the insulation currently installed in your home, starting with the exterior walls in your basement.

IS1. Approximately what percentage of the exterior basement walls is insulated?

None	1	IS6
25%	2	IS2
50%	3	IS2
75%	4	IS2
100%	5	IS2
Don't know	-98	IS1a
Refused	-99	IS2

IS1a. Do you think your basement walls are adequately insulated?

Yes	1	IS2
No	2	IS2
Don't know	-98	IS2
Refused	-99	IS2

IS2. For the exterior walls in your basement, what type of insulation is present?
[READ LIST. ALLOW MULTIPLE RESPONSES]

Blanket – batt or roll	1	IS3
Foam board insulation	2	IS5
Loose fill insulation	3	IS3
Spray foam insulation	4	IS5
Don't know	-98	IS6
Refused	-99	IS6

IS3. What is the R-value of the <blanket insulation/loose fill insulation> in the exterior walls of your basement?

[ALLOW MULTIPLE RESPONSES]

Less than R-12	2	IS6
R-12	3	IS4
R-12 to R-20	4	IS4
R-20	5	IS4
R-20 to R-25	6	IS4
R-25 or more	7	IS4
Don't know	-98	IS6
Refused	-99	IS6

IS4. Approximately what is the thickness of the <blanket insulation/loose fill insulation> in your exterior basement walls?

[DO NOT READ. ALLOW MULTIPLE RESPONSES]

Less than 3 inches	1	IS6
3 to 5 inches	2	IS6
6 inches	3	IS6
More than 6 inches	4	IS6
Don't know	-98	IS6
Refused	-99	IS6

IS5. Approximately what is the thickness of the <foam board insulation/spray foam insulation> in the exterior basement walls?

[DO NOT READ. ALLOW MULTIPLE RESPONSES]

Less than one inch	1	IS6
1 to 2 inches	2	IS6
2 to 3 inches	3	IS6
More than 3 inches	4	IS6
Don't know	-98	IS6
Refused	-99	IS6

Next, I would like to ask you a few questions about basement ceiling insulation.

IS6. Approximately what percentage of the basement ceiling is insulated?

None	1	IS11
25%	2	IS7
50%	3	IS7
75%	4	IS7
100%	5	IS7
Don't know	-98	IS11
Refused	-99	IS11

IS7. For the part of your basement ceiling that is insulation, what type of insulation is present?

[READ LIST. ALLOW MULTIPLE RESPONSES]

Blanket – batt or roll	1	IS8
Foam board insulation	2	IS10
Loose fill insulation	3	IS8
Spray foam insulation	4	IS10
Don't know	-98	IP11
Refused	-99	IP11

IS8. What is the R-value of the <blanket insulation/loose fill insulation> in the basement ceiling?

[ALLOW MULTIPLE RESPONSES]

Less than R-20	1	IS11
R-20 to R-30	2	IS9
R-30 to R35	3	IS9
R-35 or more	4	IS9
Don't know	-98	IS11
Refused	-99	IS11

IS9. Approximately what is the thickness of the <blanket insulation/loose fill insulation> in your basement ceiling?

[DO NOT READ. ALLOW MULTIPLE RESPONSES]

Less than 6 inches	1	IS11
6 to 12 inches	2	IS11
More than 12 inches	3	IS11
Don't know	-98	IS11
Refused	-99	IS11

IS10. Approximately what is the thickness of the <foam board insulation/spray foam insulation> in your basement ceiling?

[DO NOT READ. ALLOW MULTIPLE RESPONSES]

Less than one inch	1	IS11
1 to 2 inches	2	IS11
2 to 3 inches	3	IS11
More than 3 inches	4	IS11
Don't know	-98	IS11
Refused	-99	IS11

Next, I would like to ask you a few questions about your attic/crawl space insulation.

IS11. Approximately what percentage of the attic/crawl space is insulated?

None	1	IS16
25%	2	IS12
50%	3	IS12
75%	4	IS12
100%	5	IS12
Don't know	-98	IP16
Refused	-99	IP16

IS12. For the part of your attic/crawl space that is insulated, what type of insulation is present?

[READ LIST. ALLOW MULTIPLE RESPONSES]

Blanket – batt or roll	1	IS15
Foam board insulation	2	IS17
Loose fill insulation	3	IS15
Spray foam insulation	4	IS17
Don't know	-98	IP1
Refused	-99	IP1

IS13. What is the R-value of the <blanket insulation/loose fill insulation> in the attic/crawl space?

[ALLOW MULTIPLE RESPONSES]

Less than R-20	1	IS14
R-20 to R-30	2	IS14
R-30 to R35	3	IS14
R-35 or more	4	IS14
Don't know	-98	IS16
Refused	-99	IS16

IS14. Approximately what is the thickness of the <blanket insulation/loose fill insulation> in your attic/crawl space?

[DO NOT READ. ALLOW MULTIPLE RESPONSES]

Less than 6 inches	1	IS16
6 to 12 inches	2	IS16
More than 12 inches	3	IS16
Don't know	-98	IS16
Refused	-99	IS16

IS15. Approximately what is the thickness of the <foam board insulation/spray foam insulation> in your attic/crawl space?

[DO NOT READ. ALLOW MULTIPLE RESPONSES]

Less than one inch	1	IS16
1 to 2 inches	2	IS16
2 to 3 inches	3	IS16
More than 3 inches	4	IS16
Don't know	-98	IS16
Refused	-99	IS16

[READI IF S5=1, ELSE SKIP TO TS1]

Now I'd like to ask a few questions about the insulation you have installed in your home since 2009.

IS16. Which of the following kinds of insulation have you installed in home since 2009?

Basement wall insulation	1	IS17
Basement ceiling insulation	2	IS17
Attic or crawl space insulation	3	IS17
Don't know	-98	IS17
Refused	-99	IS17

IS17. Is your basement heated?

Yes – 100%	1	IP1
Partially - >50%	2	IP1
Partially <50%	3	IP1
No	4	IP1
Don't know	-98	IP1
Refused	-99	IP1

PURCHASE EXPERIENCE

IP1. Where did you purchase your insulation?
[ALLOW MULTIPLE RESPONSES]

Contractor	1
Home improvement/hardware store (Ace, Home Depot, True Value)	2
Manufacturer	3
Someone else purchased	5
Internet	6
Other (specify)	7
Don’t know	-98
Refused	-99

IP2. Who installed the insulation?

[ALLOW MULTIPLE RESPONSES]

Member of household	1
Friend or family member outside of household	2
Contractor	3
Other (Specify:_________________________________)	4
Don’t know	-98
Refused	-99

ENERGY EFFICIENCY AWARENESS

IA1. When you were shopping for the insulation you purchased, were you aware of the recommended minimum levels of <basement wall, basement ceiling, attic/crawl space> insulation of < R12, R20, R32>?

Yes	1	IA2
No	2	TS1
Don’t know	-98	TS1
Refused	-99	TS1

IA2. How did you learn about recommended ……?
[DO NOT READ LIST. ALLOW MULTIPLE RESPONSES]

Consumer Reports or other product-oriented magazines]	1	IA3
Other magazines	2	IA3
Electric utility	3	IA3
Retailers or salesperson	4	IA3
Contractors	5	IA3
Friend, neighbor, relative, or co-worker	6	IA3
Internet	7	IA3
Newspaper	8	IA3
Radio	9	IA3
Television	10	IA3
Other (RECORD) _________	11	IA3
Don't know/Not sure/Can't remember	-98	IA3
Refused	-99	IA3

IA3. Based upon this information, did you purchase insulation that met or exceeded the minimum recommended R values for the insulation?

Yes	1	TS1
No	2	IA4
Don’t know	-98	IA4
Refused	-99	IA4

IA4. Why did you choose not to purchase insulation that met or exceeded the minimum recommended R values?

Too expensive	1	IF S7=1GO TO W1 OTHERWISE GO TO D1
The dealer/ contractor didn’t recommend it	2	IF S7=1GO TO W1 OTHERWISE GO TO D1
A consumer magazine didn’t recommend it	3	IF S7=1GO TO W1 OTHERWISE GO TO D1
I prefer another brand/manufacturer	4	IF S7=1GO TO W1 OTHERWISE GO TO D1
Wasn’t in stock / Not quickly available	5	IF S7=1GO TO W1 OTHERWISE GO TO D1
Other(RECORD)________________	6	IF S7=1GO TO W1 OTHERWISE GO TO D1
Don’t know/ Not sure/ Can't remember	-98	IF S7=1GO TO W1 OTHERWISE GO TO D1
Refused	-99	IF S7=1GO TO W1 OTHERWISE GO TO D1

5 THERMOSTATS

[ASK OF ALL RESPONDENTS]

I would like to ask you a few questions about the thermostats in your home.

SATURATION

TS1. What is the total number of thermostats in your home?

1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10	10
11	11
12	12
12	12
14	14
15	15
>15	16
Don't know	-98
Refused	-99

TS2. How many of your thermostats are:
[READ AND RECORD NUMBER RESPONSE]

Programmable thermostats ________________	1
Electronic thermostats +/- 0.5 degrees Celsius ________	2
Standard manual thermostats ______________	3
Other ____________________________	4
Don't know	-98
Refused	-99

TS3a To what temperature do you set your thermostats when the rooms they control are occupied?

Degrees C________________	
Degrees F ________________	
Don't know	-98
Refused	-99

TS3b To what temperature do you set your thermostats when the rooms they control are <u>not</u> occupied?

Degrees C________________	
Degrees F ________________	
Don't know	-98
Refused	-99

TS3c [IF PROGRAMMABLE THERMOSTATS INSTALLED ASK TS3c. ELSE SKIP TO TS3d.] **Do you use your programmable thermostats to change the temperature settings automatically?**

Yes	1
No	2
Sometimes	3
Don't know	-98
Refused	-99

TS3d During a typical work week, how many hours per day is your home unoccupied?

# hours per day________________	
Don't know	-98
Refused	-99

[READI IF S6=1, ELSE SKIP TO WS1]

Now I'd like to ask you about the thermostats you have purchased and installed since 2009.

TS4. How many of the following types of thermostats did you install or have installed since 2009?
[ENTER NUMBER, -98 FOR DON'T KNOW,- 99 FOR REFUSED]

a. Programmable thermostats	___
b. Electronic thermostats +/- 0.5 degrees Celsius	___
c. Standard manual thermostats	___
d. Other	___

PURCHASE EXPERIENCE

TP1. Where did you purchase your thermostats?
[ALLOW MULTIPLE RESPONSES]

Contractor	1
Home improvement/hardware store (Ace, Home Depot, True Value)	2
Department Store (Target, K-Mart, Wal-Mart, Sears)	3
Big Box Retailer (Best Buy)	4
Local appliance store	5
	6
Someone else purchased	7
Internet	8
Other (specify)	9
Don't know	-98
Refused	-99

TP2. Who installed the thermostats?

[ALLOW MULTIPLE RESPONSES]

Member of household	1
Friend or family member outside of household	2
Contractor	3
Electrician	4
[Other] (Specify:________________________________)	5
[Don't know]	-98
[Refused]	-99

ENERGY EFFICIENCY AWARENESS

TA1. When you were shopping for the thermostats you purchased, were you aware of energy efficient thermostats, specifically programmable thermostats and electronic thermostats that are accurate within +/- 0.5 degrees Celsius?

Yes	1	TA2
No	2	WS1
Don't know	-98	WS1
Refused	-99	WS1

TA2. How did you learn about programmable thermostats and electronic thermostats?
[DO NOT READ LIST. ALLOW MULTIPLE RESPONSES]

Consumer Reports or other product-oriented magazines]	1	TA3
Other magazines	2	TA3
Electric utility	3	TA3
Retailers or salesperson	4	TA3
Contractors	5	TA3
Friend, neighbor, relative, or co-worker	6	TA3
Internet	7	TA3
Newspaper	8	TA3
Radio	9	TA3
Television	10	TA3
Other (RECORD) _________	11	TA3
Don't know/Not sure/Can't remember	-98	TA3
Refused	-99	TA3

[IF TS4a AND/OR TS4b = 0, ASK TA3. ELSE SKIP TO WS1.]

TA3. Why did you choose not to purchase and install either programmable thermostats or energy efficient electronic thermostats?

Too expensive	1	WS1
The dealer/ contractor didn't recommend it	2	WS1
A consumer magazine didn't recommend it	3	WS1
It didn't have the controls/features I was looking for	4	WS1
It didn't have the style or color I was looking for	5	WS1
I prefer another brand/manufacturer	6	WS1
Wasn't in stock / Not quickly available	7	WS1
I wasn't sure how to install them	8	WS1
I wasn't sure how to use them	9	WS1
The regular thermostats work fine for me	10	WS1
Other(RECORD)________________	11	WS1
Don't know/ Not sure/ Can't remember	-98	WS1
Refused	-99	WS1

6 ENERGY STAR WINDOWS

[ASK OF ALL RESPONDENTS]

Next, I would like to ask you a few questions about the windows n your home.

SATURATION

WS1. What is the number of windows in your home? Please give me your best estimate.
[RECORD NUMBER RESPONSE]

Record number _______________	1
Don't know	-98
Refused	-99

WS2. What percentage of your windows are:
[READ AND RECORD PERCENTAGE RESPONSE AND ALLOW MULTIPLE RESPONSES]

Single pane ________________	1
Double pane ________	2
Gas filled_____________	3
UV coated _________________	4
ENERGY STAR certified	5
Other __________________________	6
Don't know	-98
Refused	-99

WS3. What percentage of your windows have the following types of window frames?
[READ AND RECORD PERCENTAGE RESPONSE AND ALLOW MULTIPLE RESPONSES]

Wood _________________	1
Vinyl ________	2
Metal _____________	3
Other __________________________	5
Don't know	-98
Refused	-99

WS4. How many windows have you purchased and installed since 2009?

Less than 5	1
6	2
7	3
8	4
9	5
10	6
11	7
12	8
12	9
14	10
15	11
>15	12
Don't know	-98
Refused	-99

WS5. What type of windows did you purchase?
[READ – ACCEPT MULTIPLES]

Double pane	1
Gas filled	2
UV coated	3
ENERGY STAR	4
Other	5
Don't know	-98
Refused	-99

PURCHASE EXPERIENCE

[IF S7 = 1 ASK WP1. ELSE GO TO D1]

WP1. Where did you purchase your windows?
[ALLOW MULTIPLE RESPONSES]

Contractor	1
Home improvement/hardware store (Ace, Home Depot, True Value)	2
Manufacturer	3
Retail store specializing in windows	4
Someone else purchased	5
Internet	6

Other (specify)	7
Don't know	-98
Refused	-99

WP2. When you were shopping for your windows, what characteristics were important to you? Anything else?

[DO NOT READ LIST. ACCEPT MULTIPLE RESPONSES]

Price/Cost	1	WP3
Brand	2	WP3
Energy savings	3	WP3
ENERGY STAR Rating	4	WP3
Appearance – match to rest of exterior	5	WP3
Reliability/Warranty	6	WP3
Salesperson / Contractor recommendation	7	WP3
Consumer magazine / online recommendation	8	WP3
Double or triple pane	9	WP3
Type of frame – wood, vinyl, etc	10	WP3
Other] (RECORD) ____________________	11	WP3
Don't know/Not sure/Can't remember	-98	WA1
Refused	-99	WA1

[GOTO WA1 IF ANSWER TO WP2 HAS ONLY ONE ANSWER]

WP3. Which of those characteristics was the most important one?

Price/Cost	1
Brand	2
Energy savings	3
ENERGY STAR Rating	4
Features	5
Reliability/Warranty	6
Salesperson / Contractor recommendation	7
Consumer magazine / online recommendation	8
Other] (RECORD) ____________________	9
Don't know/Not sure/Can't remember	-98
Refused	-99

WP4. Who installed the windows?

[ALLOW MULTIPLE RESPONSES]

Member of household	1
Friend or family member outside of household	2
Contractor	3
Other (Specify:_________________________________)	4
Don't know	-98
Refused	-99

ENERGY EFFICIENCY AWARENESS

WA1. When you were shopping for the windows you purchased, were you aware ENERGY STAR windows?

Yes	1	WA2
No	2	D1
Don't know	-98	D1
Refused	-99	D1

WA2. How did you learn about recommended ENERGY STAR windows?
[DO NOT READ LIST. ALLOW MULTIPLE RESPONSES]

Consumer Reports or other product-oriented magazines]	1	WA3
Other magazines	2	WA3
Electric utility	3	WA3
Retailers or salesperson	4	WA3
Contractors	5	WA3
Friend, neighbor, relative, or co-worker	6	WA3
Internet	7	WA3
Newspaper	8	WA3
Radio	9	WA3
Television	10	WA3
Other (RECORD) _________	11	WA3
Don't know/Not sure/Can't remember	-98	WA3
Refused	-99	WA3

WA3. Based upon this information, did you purchase ENERGY STAR windows?

Yes	1	D1
No	2	WA4
Don't know	-98	WA4
Refused	-99	WA4

WA4. Why did you choose not to purchase ENERGY STAR windows?

Too expensive	1	D1
The dealer/ contractor didn't recommend it	2	D1
A consumer magazine didn't recommend it	3	D1
I prefer another brand/manufacturer	4	D1
Did not have the features or the color	5	D1
Wasn't in stock / Not quickly available	6	D1
Other(RECORD)________________	7	D1
Don't know/ Not sure/ Can't remember	-98	D1
Refused	-99	D1

7 DEMOGRAPHICS

We're almost finished. I have just a few more questions to make sure we are getting a representative sample of Newfoundland Power and Newfoundland and Labrador Hydro customers.

D1. Which of the following best describes your age? Would you say…
[READ LIST.]

1	Less than 18 years old,	D2
2	18 to 24	
3	25 to 34	
4	35 to 44	
5	45 to 54	
6	55 to 64 or	
7	65 or older	
-98	[Refused]	
-99	[Don't know]	

D2. What is the highest level of education you have completed?
[DO NOT READ LIST. PROMPT IF NECESSARY.]

1	[No schooling]	D3
2	[Less than high school]	
3	[Some high school]	
4	[High school graduate or equivalent (e.g., GED)]	
5	[Trade or technical school]	
6	[Some college]	
7	[College degree]	
8	[Some graduate school]	
9	[Graduate degree]	
-98	[Refused]	
-99	[Don't know]	

D3. What was your annual household income from all sources in 2012, before taxes? Please stop me when I reach the category that best describes your household's income. Would you say…
[READ LIST]
[IF NECESSARY: "This information is confidential and will only be used for the purpose of characterizing study respondents."]

1	Less than $20,000 per year,	D4
2	20 to less than $40,000,	
3	40 to less than $60,000,	
4	60 to less than $80,000,	
5	80 to less than $100,000,	
6	100 to less than $150,000, or	
7	$150,000 or more?	
-98	Refused	
-99	Don't know	

D4. Including yourself, how many people live in your home more than nine months of the year?

1	1	D5
2	2	D5
3	3	D5
4	4	D5
5	5	D5
6	6	D5
7	>6	D5
-98	Refused	D6
-99	Don't know	D6

D5. For the people living in your home more than nine months a year, how many are in each of the following age groups?
[READ AND RECORD RESPONSES]

1	< 18 years old	D6
2	19 to 25 years old	D6
3	25 to 40 years old	D6
4	41 to 50 years old	D6
5	51 to 65 years old	D6
6	>65 years old	D6
-98	Refused	D6
-99	Don't know	D6

D6. What year was your home built?

Record number ________________	1	D7
Don't know	-98	D7
Refused	-99	D7

D7. What is the square footage of your home?

1	< 1,000 square feet	D8
2	1,000 to 1,500 sq ft.	
3	1,500 to 2,000 sq ft	
4	2,000 to 2,500 sq ft	
5	2,500 to 3,000 sq ft	
6	> 3,000 sq ft	
-98	Refused	
-99	Don't know	

D8. How many stories is your home?

1	1	END_0 or 1
2	2	
3	3	
4	>3	
-98	Refused	
-99	Don't know	

8 WRAP UP

END_0. **Okay, great. Today we're trying to reach customers who have <u>not</u> participated in any of BWL's programs, so I don't have any more questions for you today. Thank you for your time.**

END_1. **Those are all of the questions I have for you today. Thank you for your time.**

11 APPENDIX C – *takeCHARGE* Retailer Survey

Newfoundland Power and Newfoundland & Labrador Hydro
takeCHARGE Programs
Interview Guide for:
Participating and Non-Participating Retailers
December 2013

Contact Name:____
Company: ____
Street Address: ____
Community:____
Telephone: ____

Interview Date:_______ **Interview Time:** _______ **Duration of Interview:** _______

LEAD-IN:

Hi, my name is _______ calling on behalf of Newfoundland Power and Newfoundland and Labrador Hydro. The Utilities are conducting a study to help improve their residential energy efficiency programs. May I please speak to someone who is familiar with your business affairs?

[IF CORRECT PERSON, CONTINUE]

Name: ________________________________
Title: ________________________________
Phone: ________________________________

[IF NOT] **Who would that person be?**

Name: ________________________________
Title: ________________________________
Phone: ________________________________

[WHEN CORRECT PERSON]
I would like to ask some questions about your recent experiences and views on sales of <<ENERGY STAR windows/insulation/thermostat> The information we gather will be kept confidential and will not be associated with you or your business in any way.

[IF THEY ASK] **The conversation will take about 15 minutes.**

Newfoundland Power and Newfoundland & Labrador Hydro
takeCHARGE Programs

Interview Guide for:
Participating and Non-Participating Contractors / Builders
12/05/2013

Introduction

My name is ________from Dunsky Energy Consulting, calling on behalf of Newfoundland Power & Newfoundland and Labrador Hydro. THIS IS NOT A SALES CALL. We are doing a brief survey with contractors and builders as part of a third-party evaluation of the takeCHARGE Programs.

Please note that a $50 VISA gift card will be mailed to you as compensation for your time.

First I would like to briefly provide you with some information on the interview process.

The interview should take about 15 minutes. If you don't have any objection, I will be recording our conversation so that I can be sure not to miss anything in my written report.

Our report will contain anonymous comments from approximately 20 participating and non-participating contractors and builders. I want to assure you that nowhere in the report or in any other communications will we specifically mention your name or the name of your organization.

General Information

I'd like to start by asking some questions about your company. This series of questions will help us the market's baseline and the programs' impacts.

1. According to our list, your company's primary area of expertise is _______? Can you confirm this information? Are there any other areas you're involved in? [*Probe for insulation, thermostats, windows, new construction, remodeling of existing homes]*

2. [*For each relevant area of expertise*] How many projects involving [*SERVICE*] did you complete in the past two years? [*2012 and 2013*]

3. [FOR NEW HOMES]
    a. In what communities did you build new homes in 2012 and 2013?
    b. What portion of the new homes you built in 2012 and 2013 had the following features:
        - Electric heat
        - Attic insulation [Attics: min R32 to max R40]
        - Basement insulation [Basement walls: min R12 to max R20]
        - Energy Star windows
        - Programmable thermostats
        - Electronic thermostats that are not programmable

4. [FOR REMODELING PROJECTS]
    a. In what communities did you remodel homes in 2012 and 2013?
    b. What portion of the remodeling projects in 2012 and 2013 had the following features:
        - Electric heat
        - Attic insulation [Attics: min R32 to max R40]
        - Basement insulation [Basement walls: min R12 to max R20]
        - Energy Star windows
        - Programmable thermostats
        - Electronic thermostats that are not programmable

5. [FOR INSULATION]
    a. What portion of the insulation projects you completed was in existing homes versus new homes?
    b. What portion of the insulation projects you completed in 2012 and 2013 met program requirements? [Describe requirements]
    c. [probe for new homes versus existing homes if applicable]
    d. In the past three years, what was the portion that:
        i. Went up? By how much?
        ii. Went down? By how much
        iii. Stayed the same
    e. [if 5d response = went up] How important was the takeCHARGE program in affecting the increase? Why do you say that?

6. [FOR WINDOW PROJECTS]
    a. What portion of the window installation projects you completed was in existing homes versus new homes?
    b. What portion of the window installation projects you completed in 2012 and 2013 used Energy Star windows?

c. [probe for new homes versus existing homes if applicable]

7. [FOR THERMOSTATS – REPEAT QUESTIONS FOR PROGRAMMABLE THERMOSTATS AND ELECTRONIC THERMOSTATS]
    a. What portion of the thermostat installations you completed was in existing homes versus new homes?
    b. What portion of the thermostats you installed in 2012 and 2013 met program requirements? [programmable thermostats or electronic thermostats with a temperature rating of +/- 0.5 degrees Celsius are eligible for the rebate]
    c. [probe for new homes versus existing homes if applicable]

8. How many employees, including yourself, does your company have? *[Probe for Full-time/Part-time]*

9. Did your firm participate in the takeCHARGE programs *[Briefly explain programs if required]*?

    a. YES: Go to PARTICIPATING CONTRACTOR section
    b. NO: Go to NON-PARTICIPATING CONTRACTOR section

PARTICIPATING CONTRACTOR SECTION

Barriers

1. How aware, would you say, are your customers of the takeCHARGE Programs? *[Probe: What share already knows about the program before you tell them about it?]* How interested are they in the program? Does awareness or interest vary by any customer characteristics (e.g., municipality, economic status)?

2. How frequently do you promote the program to your customers?

    a. For all relevant projects? Why?
    b. For most projects? Why?
    c. For some projects? Why?
    d. For no projects? Why?

3. How easy or difficult is it for you to sell the program to customers? Why?

[We are seeking information on market barriers to participation due to program features (product/service availability, rebate level, application form, etc.)

4. What are the key barriers to your customers' purchase of basement/attic insulation; programmable or electronic thermostats; ENERGY STAR window? *[Probe for barriers by product type if relevant]* What could be done to overcome these barriers? How are the Programs addressing those barriers right now?

5. Could you suggest any changes to program processes or requirements that would make it easier for you and your customers to participate?

Marketing and Communication

6. What marketing channels used by the Program are you aware of? In your opinion, are the marketing efforts appropriate? What works/doesn't work with customers? Why?

7. Does your organization use the takeCHARGE Program as a tool for your own marketing efforts? If so, how? What, if any, materials or support does the utilities provide your firm? Are there any additional materials that would be useful to you?

8. In your view, are there gaps or underserved market segments that could present an opportunity for the measures being promoted? [*Probe which segments and why*]

Program's Influence

I now have a few questions about how the takeCHARGE Programs might have affected the market for home energy retrofits and new construction in Newfoundland & Labrador.

9. In your opinion, what changes have the takeCHARGE Programs brought to the residential retrofit and new construction markets? *[Probe to get details on insulation, thermostats, windows, new construction, remodeling]*
   a. Have the Programs helped lead to changes in the demand for energy efficiency measures, or increased contractor activity, in the past four years?
   b. Have the Programs helped promote energy efficiency measures that wouldn't otherwise have been realised? Please explain.
   c.
   d. How did the change in the building code affect the adoption of the qualifying equipment for new construction? For major remodeling?
   e. What trends do you see in the coming years regarding the installation of qualifying equipment in your market?
   f. What role does energy efficiency play in your marketing strategy and business practice? What is the value for you of promoting energy efficiency measures?

10. As a result of the takeCHARGE Programs…
    a. have you changed the type of services you provide or the type of equipment you install?
    b. have you changed any other business practices as a result of the program? [Probe for: hired more staff, opened up new offices, changed marketing, etc.]
    c. have you experienced an increase in your business?

Satisfaction

11. Generally speaking, what is your experience so far with the takeCHARGE Programs? What are the key strengths? What could be improved on?

12. How satisfied are you with your participation in the program as a contractor? Please explain.

13. How satisfied do you think your customers are with their participation in the program? Please explain.

14. Are there any other comments you have or recommendations you would like to make for improving the program?

The interview is now completed. I want to thank you very much for your time in helping improve the takeCHARGE program in the future.

NON-PARTICIPATING CONTRACTOR SECTION

Program Awareness and Barriers

1. Are you aware of the takeCHARGE programs? *[Probe to what extent they are aware of them. Have they heard of them, do they know the programs details, etc. Ask how they heard about the programs.]*

2. How aware, would you say, are your customers of the takeCHARGE Program?

[Ask only if contractor is aware of the takeCHARGE programs]

3. Do you promote the program to your customers? (Always, most of the time, sometimes, rarely, never?) Why?

4. How easy or difficult is it for you to sell the program to customers? Why?

5. What would be the main barriers/reasons for not participating in the programs?
   a. For you?
   b. For your customers?

6. What changes could be made to the program to make it more interesting to you? To your customers?

Program's Influence

I now have a few questions about how the takeCHARGE Program might have affected the market for home energy retrofits and new construction in Newfoundland & Labrador.

7. In your opinion, what changes have the takeCHARGE Programs brought to the residential retrofit and new construction markets? *[Probe to get details on insulation, thermostats, windows, new construction, remodeling]*
   g. Have the Programs helped lead to changes in the demand for energy efficiency measures, or increased contractor activity, in the past two years?
   h. Have the Programs helped promote energy efficiency measures that wouldn't otherwise have been realised? Please explain.

i. How did the change in the building code affect the adoption of the qualifying equipment for new construction? For major remodeling?
j. What trends do you see in the coming years regarding the installation of qualifying equipment in your market?
k. What role does energy efficiency play in your marketing strategy and business practice? What is the value for you of promoting energy efficiency measures?

The interview is now completed. I want to thank you very much for your time in helping improve the takeCHARGE program in the future.

SC. SCREENING

PARTICIPATING RETAILERS

SC1. According to our records, your business has sold <ENERGY STAR windows/insulation/thermostat> between now and 2009. Can you confirm this information?

Yes.. 1
No.. 2
[CONTINUE SURVEY. TREAT RESPONDENT AS NONPARTICIPANT]
[DON'T KNOW] .... -97[T&T1]
[REFUSED] .... -98[T&T1]

[T&T1. THANK & TERMINATE SCRIPT]
"I'm sorry, but we've been asked to interview contractors or distributors that have sold ENERGY STAR windows, energy efficient insulation, or programmable or high performance electronic thermostats in the Newfoundland Power and Newfoundland and Labrador Hydro service areas between now and 2009. Thank you for your time."

NON-PARTICIPATING RETAILERS

SC2. [FOR INTERVIEWEES FROM THE "NONPARTICIPANT SAMPLE FRAME"]
Have you ever have worked with representatives for the takeCHARGE Programs?

GCI. General Company Information

Next, I'd like to ask for some general information about your business's operations at this location.

GCI1. First, what is your job title?

GCI2. About how many full-time employees does your business employ at your location?

GCI3. Does your business operate at other locations in Newfoundland and Labrador? How many others?

GCI3A. You mentioned your business has multiple locations in Newfoundland and Labrador. Do these locations act independently in terms of their sales decisions or are sales decisions made at a higher or corporate level?

GCI4. Of the following, which best describes your business?

GCI4a. Which days of week and times of day are your busiest?

GCI5. Which of the following products does your business sell from this location?

GCI6. I noticed you said your business doesn't sell Energy Star Products. Why not?

EE. Sales of Energy Efficient Products

Now I'm going to ask you some questions about some of the energy efficient products you sell.

WINDOWS

EEW1. What percentage of your sales are to:

Contractors ________________%
Do-It-Yourself Homeowners _______________%

EEW2. Has the market share of sales to contractors increased/decrease/stayed the same since 2009? Why?

EEW3. Has the market share of sales to DIY homeowners increased/decrease/stayed the same since 2009? Why?

EEW4. What percentage of the windows your business sells are:

Single pane ________________%
Double pane _______________%
Gas filled_______________%
UV coated ________________%
ENERGY STAR certified _______________%

EEW5.

EEW6. Do you consider ENERGY STAR windows to be a good value for your residential customers?

EEW7. Why do you say that?

EEW8. What are reasons, if any, your residential customers do not purchase ENERGY STAR windows?

EEW9. Do these sales seem likely to continue based on your understanding of the current market?

EEW9a. Why do you say that?

INSULATION

EEI1. What percentage of your sales are to:

Contractors ________________%
Do-It-Yourself Homeowners _______________%

EEI2. Has the market share of sales to contractors increased/decrease/stayed the same since 2009? Why?

EEI3. Has the market share of sales to DIY homeowners increased/decrease/stayed the same since 2009? Why?

EEI4. Which of the following types of residential insulation for basements and attics does your business sell?

Blanket – batt or roll
Foam board insulation
Loose fill insulation
Spray foam insulation
Other (Specify)

EEI5. What is the percentage of insulation does your business sells for the following R-values?

Less than R-12 ________________%
R-12 ________________%
R-12 to R-20 ________________%
R-20 ________________%
R-20 to R-25 ________________%
R-25 or more ________________%

EEI6. **Do you consider basement insulation > R20 and attic insulation > R32 to be a good value for your residential customers?**

EEI6a. **Why do you say that?**

EEI7. **Do customers ask advice regarding type of and level of insulation?**

EEI4. **What are reasons, if any, your residential customers do not purchase basement insulation > R20 and attic insulation > R32?**

EEI7. **Do these sales trends seem likely to continue based on your understanding of the current market?**

EEI7a. **Why do you say that?**

THERMOSTATS

EET1. **What percentage of your sales are to:**

Contractors ________________%
Do-It-Yourself Homeowners _______________%

EET2. **Has the market share of sales to contractors increased/decrease/stayed the same since 2009? Why?**

EET3. **Has the market share of sales to DIY homeowners increased/decrease/stayed the same since 2009? Why?**

EET1. **What percentage of the residential thermostats your business sells are:**

Programmable thermostats ________________%
Electronic thermostats +/- 0.5 degrees Celsius _______________%
Standard manual thermostats ________________%
Other (Specify) ________________%

EET2. **Do you consider programmable thermostats or energy efficient electronic thermostats to be a good value for your residential customers?**

EET2a. **Why do you say that?**

EET3. **What are reasons, if any, your residential customers do not purchase either programmable thermostats or energy efficient electronic thermostats?**

EET6. **Do these sales trends seem likely to continue based on your understanding of the current market?**

EET6a. **Why do you say that?**

PA. PROGRAM AWARENESS

NON-PARTICIPANTS

PA1. Are you aware of the takeCHARGE program sponsored by Newfoundland Power and Newfoundland and Labrador Hydro utilities?

PA2. Do you know what types of <Windows/basement and attic insulation/thermostat> equipment this program rebates?

PA2A. Which types?

PA3. Do you know what rebate levels the takeCHARGE program offers for this energy-efficient product?

PA4A. What levels?

[ASK IF PARTICIPANT AND NON-PARTICIPANT WHO IS AWARE OF PROGRAMS]

PA5. How did you hear about the takeCHARGE program?

EEM. ENERGY EFFICIENT MARKETING

Now I'm going to ask you some questions about your experience with marketing and sales practices.

EEM1: How does your business advertise its services?

EEM2. Is energy efficiency featured in any of these advertisements?

a. [IF YES] **How so?** [IF NO] **Why not?**

EEM3. Since 2009, does your business more frequently/less frequently/about the same recommend high efficiency ENERGY STAR windows, energy efficient insulation, and programmable and high performance electronic thermostats?

EE Measure	EEM3. Recommend more/less/same frequently since 2009? Yes/No	EEM3a. Why is that?
Energy Star Windows		
Insulation		
Programmable and high performance electronic thermostats		

[ASK IF PARTICIPANT OR NON-PARTICIPANT WHO IS AWARE OF THE PROGRAM]

EEM4. Have you received any marketing support through the program?

EEM5. What marketing support have you received?

EEM6. On a scale of 1 to 5, where 5 is "Very Effective" and 1is "Not at all Effective," how effective do you think the takeCHARGE program has been in encouraging retailers to sell more efficient <ENERGY STAR windows/insulation/thermostat> for residential applications?

EEM7. Why do you say that?

EEM9. What business advantages do you perceive in promoting energy efficient <ENERGY STAR windows/insulation/thermostat> technologies in residential applications?

EEM10. What disadvantages, if any, do you see in promoting energy efficient <ENERGY STAR windows/insulation/thermostat> equipment?

EEM11.[Skip if Non-Participant] **Has your business helped contractors participate in the takeCHARGE program?**

PS. PROGRAM SATISFACTION [ASK ONLY IF PROGRAM PARTICIPANT]

Next I have some questions about how satisfied you are with different aspects of the takeCHARGE Program.

PS1. On a scale of 1 to 5 where 10 means 'Very Satisfied' and 1 means 'Very Dissatisfied': Regarding the you sell, How satisfied are you with the marketing support provided by the takeCHARGE program?

PS1B. Why do you say that?

PS2. How satisfied have you been with the takeCHARGE program as a whole, considering all the things we talked about?

PS3. What aspects of the takeCHARGE program have you found work well, or are helpful?

PS4. What aspects of the takeCHARGE program would you change/improve upon if you could?

[T&T2. THANK AND TERMINATE]
Those are all the questions I wanted to ask. Thanks again for your participation.

12 APPENDIX D – *takeCHARGE* Contractor Survey

About DNV GL

Driven by our purpose of safeguarding life, property and the environment, DNV GL enables organizations to advance the safety and sustainability of their business. We provide classification and technical assurance along with software and independent expert advisory services to the maritime, oil and gas, and energy industries. We also provide certification services to customers across a wide range of industries. Operating in more than 100 countries, our 16,000 professionals are dedicated to helping our customers make the world safer, smarter and greener.

Mini-Split Heat Pump Customer Research
(2014)

The takeCHARGE Team would like to thank for participating in the Ductless Mini Split Heat Pump Study.

Please be assured that all information provided in this survey will remain confidential!

1. Do you have a Ductless Mini Split Heat Pump installed at your home, garage/shed or cottage?

2. Which of the following best describes the building where the Ductless Mini Split Heat Pump is located?
(Check all that apply)

- [ ] Cottage or seasonal home.
- [ ] Detached garage/shed that is metered separately from your home.
- [ ] Single detached home (includes mobile home).
- [ ] Semi-detached house, row/townhouse house.
- [ ] Multi-family home (two or more units contained in a single structure such as apartment/condo).

Other (please specify)

3. What year did you install the Ductless Mini Split Heat Pump?

4. What is the brand name of the Ductless Mini Split Heat Pump system(s) installed? (Check all that apply)

- [ ] Panasonic
- [ ] Comfort Air
- [ ] Lennox
- [ ] LG
- [ ] Carrier
- [ ] Samsung
- [ ] Trane
- [ ] Daiken
- [ ] Fujitsu
- [ ] Quiet Side
- [ ] Mitsubishi
- [ ] Tempstar
- [ ] Napolean
- [ ] UTL
- [ ] Kerr

Other (please specify)

5. Was the Ductless Mini Split Heat Pump installed by a qualified technician?

- ◯ Yes
- ◯ No
- ◯ Don't know

6. Number of compressor units located outside your home?

7. Number of heating/cooling units located inside your home?

8. Please indicate the number of heating/cooling units located in each of the rooms listed below. (Total should match the number of units indicated in previous question)

	1	2	3
Living Room	◯	◯	◯
Rec Room	◯	◯	◯
Kitchen	◯	◯	◯
Bedroom(s)	◯	◯	◯
Dining Room	◯	◯	◯
Hallway	◯	◯	◯
Basement	◯	◯	◯
Garage	◯	◯	◯
Cottage	◯	◯	◯
Other	◯	◯	◯

9. What was the total cost for the supply and installation of the Ductless Mini Split Heat Pump (including taxes)?

10. Did you experience problems with the installation of the Ductless Mini Split Heat Pump system?

- ◯ Yes
- ◯ No

11. Please describe the problem(s) you encountered.

12. Do you schedule regular maintenance on the Ductless Mini Split Heat Pump system?

- ◯ Yes
- ◯ No

13. Was the maintenance completed by a qualified technician?

- ◯ Yes
- ◯ No
- ◯ Don't know

14. Have you encountered problems booking a qualified technician to make repairs and/or complete maintenance on your system?

- ◯ Yes
- ◯ No
- ◯ Don't know

15. What was the primary reason for installing a Ductless Mini Split Heat Pump?

- Reduce space heating costs
- Heat/cool a particular room or space
- For benefit of air-conditioning
- Good for the environment
- Increased comfort

Other (please specify)

16. During the colder months of the year what temperature (in Celsius) is the Ductless Mini Split Heat Pump set at during the:

	<15	15	16	17	18	19	20	21	22	23	24	25
Day (8 am to 5 pm)												
Evening (5 pm to midnight)												
Overnight (midnight to 8 am)												

17. Has the installation of the Ductless Mini Split Heat Pump reduced your total energy costs?

- Yes
- No
- Don't know

18. Approximately how much have you saved in energy costs as result of installing the Ductless Mini Split Heat Pump in your home/building in the last year?

19. Where did you learn about Ductless Mini Split Heat Pumps?

- ◯ Your power company
- ◯ Newspaper advertisement
- ◯ Internet
- ◯ From friend or relative
- ◯ Supplier or Installation Company
- ◯ Retail/Building Supply Store

Other (please specify)

20. Please rate your satisfaction with the following aspects of Ductless Mini Split Heat Pump.

	very dissatisfied	dissatisfied	neither dissatisfied or satisfied	satisfied	very satisfied	N/A
Time it took to install	○	○	○	○	○	○
Resolution of any installation/setup problems	○	○	○	○	○	○
Overall installation of the system	○	○	○	○	○	○
Professionalism of installation technician	○	○	○	○	○	○
Ease of use of System/Controls	○	○	○	○	○	○
Understanding of how the system works	○	○	○	○	○	○
System maintenance	○	○	○	○	○	○
Sound level of indoor units (s)	○	○	○	○	○	○
Sound level of outdoor unit (s)	○	○	○	○	○	○
The appearance of the indoor unit(s)	○	○	○	○	○	○
Maintaining a constant temperature	○	○	○	○	○	○
Heating bill since system was installed	○	○	○	○	○	○
Comfort of the new heating system	○	○	○	○	○	○
Comfort of the new cooling system	○	○	○	○	○	○
Overall satisfaction with the system	○	○	○	○	○	○

21. Please feel free to provide additional comments about your experience with the Ductless Mini Split Heat Pump.

22. How likely are you to recommend a Ductless Mini Split Heat Pump to others?

	Very Unlikely	Unlikely	Neither Unlikely or Likely	Likely	Very Likely
Will you recommend a Ductless Mini Split Heat Pump to others?	○	○	○	○	○

23. Please indicate how your home was heated prior to, and after, the installation of the Ductless Mini Split Heat Pump system in your home.
(Check all that apply)

	Prior to Installation	After Installation
Electricity	☐	☐
Furnace/Stove Oil	☐	☐
Wood	☐	☐
Propane	☐	☐
Other	☐	☐

24. Please indicate how the water in your home was heated prior to, and after, the installation of the Ductless Mini Split Heat Pump system in your home.
(Check all that apply)

	Prior to Installation	After Installation
Electricity	☐	☐
Furnace/Stove Oil	☐	☐
Wood	☐	☐
Propane	☐	☐
Other	☐	☐

25. Since installing the Ductless Mini Split Heat Pump system in your home have you taken additional steps to reduce your space heating requirements?
(Check all that apply)

- [ ] Installing energy efficient windows
- [ ] Upgrading insulation in the walls and ceiling
- [ ] Upgrading insulation in the basement or crawl space
- [ ] Replaced old appliances with energy efficient appliances
- [ ] Upgrade older heat recovery ventilator with energy efficient unit
- [ ] Installed programmable thermostats

Other (please specify)

26. What is the square footage of the developed or heated portion of your home?

- ◯ Less than 800 sq. ft.
- ◯ 801 to 1000 sq. ft.
- ◯ 1001 to 1300 sq. ft.
- ◯ 1301 to 1600 sq. ft.
- ◯ 1601 to 2000 sq. ft.
- ◯ 2001 to 2500 sq. ft.
- ◯ Over 2500 sq. ft.

27. To the best of your knowledge, when was your home/building constructed?

- ◯ Before 1950
- ◯ 1950 to 1964
- ◯ 1965 to 1979
- ◯ 1980 to 1989
- ◯ 1990 to 1999
- ◯ 2000 to 2009
- ◯ 2010 to present
- ◯ Unsure (Do not read)

28. For an opportunity to win one of five $50 gift cards please provide the following information:

Name	
Street Address (location of the Ductless Mini Split Heat Pump)	
City/Town	
Telephone Number	
Email Address	

The takeCHARGE Team would like to thank for participating in the Ductless Mini Split Heat Pump Study.

Please be assured that all information provided in this survey will remain confidential!

Quarterly Regulatory Reports to the Public Utilities Board
(2013 – 2014)

NEWFOUNDLAND POWER
A FORTIS COMPANY

Newfoundland Power Inc.

55 Kenmount Road
P.O. Box 8910
St. John's, NL A1B 3P6
Business: (709) 737-5600
Facsimile: (709) 737-2974
www.newfoundlandpower.com

HAND DELIVERED

May 15, 2013

Board of Commissioners
of Public Utilities
P.O. Box 21040
120 Torbay Road
St. John's, NL A1A 5B2

Attention: G. Cheryl Blundon
Director of Corporate Services
and Board Secretary

Ladies and Gentlemen:

Enclosed are eleven copies of Newfoundland Power Inc.'s Quarterly Regulatory Report for the quarter ending March 31, 2013.

The report is divided into five sections: Quarterly Summary; Capital Expenditure Progress; Inter-Company Transactions; Customer Property Damage Claims; and Contribution In Aid of Construction Activity.

If you have any questions on the enclosed, please contact the undersigned at the direct number noted below.

Yours very truly,

Gerard M. Hayes
Senior Counsel

Enclosures

c. Geoffrey P. Young
Newfoundland & Labrador Hydro

Quarterly Regulatory Report

For The Period Ended

March 31, 2013

QUARTERLY REGULATORY REPORT

FOR THE PERIOD ENDED

March 31, 2013

INDEX | **TAB**

INDEX	TAB
Quarterly Summary	1
Capital Expenditure Progress	2
Inter-Company Transactions	3
Customer Property Damage Claims	4
CIAC Activity	5

Table of Contents

Highlights 1

Safety 2

Financial & Corporate 4

Customer Service 6

Energy Conservation 8

System Performance 9

Operations 12

Capital Program 14

Environment 15

Community Investment 16

Financial Statements

- Balance Sheets 17
- Statements of Earnings 18
- Statements of Retained Earnings 19
- Statements of Cashflows 20

Appendices

- A Electricity Statistics 21
- B Statements of Electricity Sold (GWh) 22
- C Statements of Revenue 23
- D Summary of Weather Adjustments 24
- E Statements of Earnings - Detail 25
- F Customer and Employee Statistics 26
- G Service Continuity Performance 27

Highlights

	1st Quarter			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Injury Frequency Rate [1]	0.7	1.8	2.7	1.8
Customer Satisfaction (%) [2]	84	88	86	88
Outage Hours per Customer (SAIDI) [3]	0.56	0.65	0.57	2.53
New Customer Connections [4]	1,141	939	1,215	4,657
Electricity Delivery [5]				
Electricity Sales (GWh)	1,942.4	1,937.7	1,913.6	5,763.6
Peak Demand (MW) [6]	1,350.5	1,330.8	1,293.1	1,330.8
Revenue ($millions)	197.7	194.4	192.3	599.8
Earnings ($millions) [7]	6.9	7.1	6.9	35.3

- One lost time incident occurred in the quarter.
- Customer satisfaction was lower compared to the same quarter last year as well as lower than plan for the first quarter this year.
- The majority of customers experienced extended outages due to loss of electricity supply from Newfoundland and Labrador Hydro (Hydro) on January 11th. Excluding this incident, customer outage duration was consistent with 2012.
- New customer connections were approximately 22% higher than Plan but lower than the same period last year.
- Electricity sales in the 1st quarter were higher than plan.
- Quarterly earnings were broadly consistent with plan, reflecting higher sales, revenue and operating expenses.
- The PUB set the Company's allowed return on equity at 8.8% effective January 1st, 2013.

[1] Injuries per 200,000 hours worked.
[2] General satisfaction result from quarterly customer satisfaction survey.
[3] Outage hours exclude January 11th supply loss.
[4] Number of new customer connections during the period.
[5] Weather adjusted.
[6] Peak demand for the 2012/2013 winter period occurred on February 9th, 2013 at 5:45 p.m.
[7] Earnings applicable to common shares.

Safety

	YTD			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Injury Frequency Rate [1,2]	0.7	1.8	2.7	1.8
Public Contact Incidents [2]	7	6	0	29

[1] Injuries per 200,000 hours worked.
[2] Plan based on historical average.

Safety Performance

There has been one injury year to date compared to four in the same period in 2012.

The employee injury in the 1st quarter occurred when an employee strained his back while stepping down from a line truck. There were six preventable vehicle accidents in the 1st quarter, consistent with the same quarter in 2012. There were 26 near miss incidents recorded in the 1st quarter which was consistent with same quarter in 2012. Follow-up from these incidents included operational procedure revisions and communication of accepted standard practices.

There were seven public contact incidents in the 1st quarter, compared to zero incidents in the 1st quarter of 2012. Three of the incidents in 2013 were high voltage contacts: two involving heavy construction equipment, and one involving a customer felling a tree. The remaining four incidents were low voltage contacts involving construction equipment contacting service wires. There were no injuries associated with any of these contacts.

Training and Prevention

The annual internal review of the Health & Safety Management System was completed. The review confirmed the effectiveness of the system.

Over half of the Company's annual safety training requirements were completed during the quarter. This included safety management training with Line Supervisors and Lead Hands in Operations.

In the 1st quarter, a senior management safety review committee was established. This team conducts monthly reviews of safety incidents and higher potential near misses to ensure the quality and timeliness of investigations and follow-up.

The Public Contact Prevention Working Group met with industry stakeholders during the quarter. Newfoundland Power provided a presentation on electrical safety and public contacts for the members of the Newfoundland and Labrador Construction Safety Association (NLCSA), and participated in the Newfoundland and Labrador Construction Association Conference.

Demonstration of electrical safety hazards at the NL Construction Association Conference, St. John's

Approximately 1,000 students representing 20 elementary schools across the province participated in electrical safety presentations. 124 volunteer fire fighters attended the Company's Fire Fighting and Electricity seminars. The Company continued to promote public safety through television advertising during the quarter, and Hydro has joined the Company to support this campaign.

Newfoundland Power hosted the 8th Annual Electrical Utility Work Methods and Best Industry Practice conference. Utility representatives from across Canada and from Caribbean Utility Company (CUC) attended the two and a half day event to share their experiences and best practices.

Financial & Corporate

	1st Quarter			Annual [1]
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Electricity Sales (GWh)	1,942.4	1,937.7	1,913.6	5,763.6
Revenue ($ millions)	197.7	194.4	192.3	599.8
Purchased Power Costs ($ millions)	144.8	143.6	142.0	389.1
Operating Costs ($ millions) [2]	15.9	15.4	14.9	55.6
Gross Operating Cost per Customer ($) [3]	67	66	64	241
Earnings ($ millions) [4]	6.9	7.1	6.9	35.3

1 As per Order No. P.U. 13(2013).
2 Excluding pension, OPEBs, and early retirement program costs.
3 Includes operating, general expense capital, and conservation costs.
4 Earnings applicable to common shares.

Financial Results

Electricity sales were 4.7 GWh or 0.2% higher than plan and 28.8 GWh, or 1.5%, higher than 1st quarter results in 2012. The increase reflects growth in residential sales primarily related to new home construction and a higher proportion of electrically heated homes. Commercial sales also increased, largely due to construction activity at the hydromet nickel processing plant in Long Harbour and the gravity based structure at Bull Arm for the Hebron oilfield. Sales were negatively impacted by the closure of the Beaver Brook Antimony Mine in central Newfoundland and the High Liner fish processing facility in Burin.

During the 1st quarter, revenue and purchased power costs were higher than plan and 2012 primarily due to higher electricity sales.

Operating costs for the 1st quarter were higher than plan, primarily due to costs related to restoration efforts following the loss of Hydro supply on January 11th.

Earnings for the 1st quarter were slightly lower than plan. This is the result of higher operating expenses and depreciation which were partially offset by higher sales revenue.

2013 General Rate Application

On September 14th, 2012, the Company filed a 2013/2014 General Rate Application ("GRA") with the PUB which included a full review of the Company's costs, including the cost of capital. On April 17th, 2013, the PUB issued the Order on the GRA, which approved the Company's costs for ratemaking purposes and established the Company's cost of capital for 2013 through 2015. The regulated ROE of 8.8% and 45% common equity are consistent with 2012. The Company is required to file its next GRA for 2016 on or before June 1st, 2015.

Customer Rates

Customer electricity rates will be adjusted effective July 1st, 2013 to reflect the annual operation of the Rate Stabilization Account ("RSA") and the impact of the Company's GRA Order.

The annual operation of Hydro's Rate Stabilization Plan ("Hydro RSP") and the Company's RSA, will result in an average customer rate decrease of approximately 8%, effective July 1st, 2013. The implementation of the GRA Order is expected to increase electricity rates by an average of approximately 5% effective July 1st, 2013. When combined, it is expected that Newfoundland Power's customer electricity rates will be, on average, approximately 3% lower as of July 1st, 2013.

Materials Management

The Company negotiated contracts for pole installation, including fixed pricing for 3 years through 2015. The new contracts reflect a 30% increase from pricing fixed in the 2009 contracts. This is forecast to increase capital costs for poles by approximately $1.5 million annually, of which 40% or $600,000 will be passed on to Bell Aliant.

During the quarter, a number of changes were made to materials management structure and processes. Responsibility for the area storekeepers shifted from the area offices to Materials Management to bring renewed focus and more consistent expectations for this role. A new system was implemented which enables online ordering of fire retardant clothing and direct delivery to the employee, which will reduce the time and effort spent by supervisory and warehouse staff. A new requisitioning system has also been selected and implementation has begun.

Customer Service

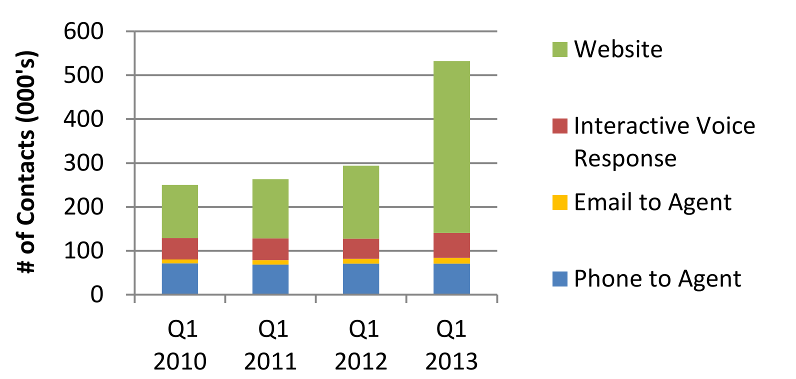
	YTD			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Customer Satisfaction (%) [1]	84	88	86	88
Service Level (%) [2]	81	80	83	80
Customer Self Service (%) [3]	84	72	73	72
Trouble Call Response (%) [4]	82	85	87	85
Street Light Call Response (%) [5]	88	85	83	85

[1] General satisfaction result from quarterly customer satisfaction survey.
[2] % of customer calls answered within 60 seconds.
[3] % of customer contacts via technology (no person to person contact)
[4] % of trouble call response within 2 hours. Excludes impact of January 11th loss of supply.
[5] % of street light call response within 5 days.

Customer Service Performance

81% of web site visits on January 11th were from a mobile device.

In the 1st quarter, customer satisfaction and service level were lower than in the same quarter of 2012. The lower customer satisfaction result was primarily related to reliability concerns. This likely reflects the scope and duration of outages caused by loss of supply from Hydro on January 11th, and continued media and public attention to supply issues. Service level in the 1st quarter was slightly better than plan.



Customer Initiated Contacts

Customer activity on the Company's web site increased by 135% compared to 1st quarter, 2012. From January 11th to 13th, there were approximately 150,000 customer visits to the Newfoundland Power website. On January 11th alone, the number of website visits was more than four times the number of visits during Tropical Storm Leslie on September 11th, 2012. As a result, customer self-service accounted for over 84% of all customer contacts for the quarter.

There has also been an increase in the number of customers who are using the Interactive Voice Response telephone system and the website to notify the Company of payments or to make payment arrangements. The number of telephone contacts continues to be consistent with the average of previous years, though the number of customers served by the Company continues to increase.

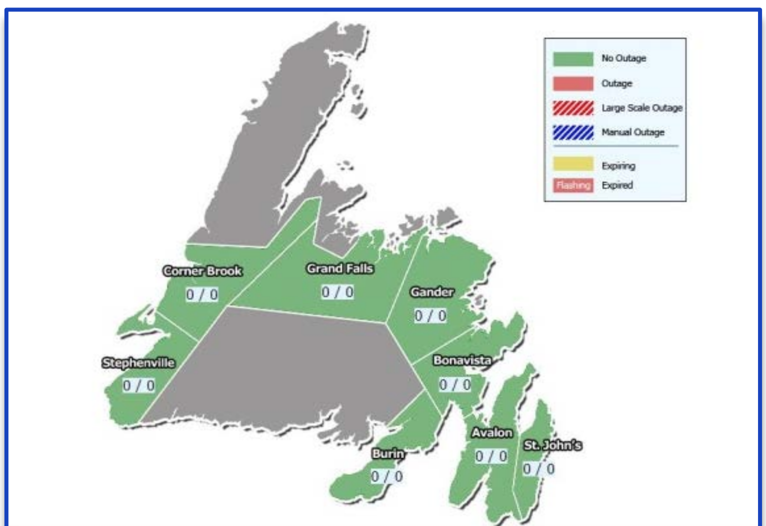
As of March 31st, approximately 55,000 customers, or 22% of the Company's total customers, are participating in ebills. This compares to the North American industry average of about 12% participation.

Customer Service Improvements

Following the January 11th loss of supply incident, the Company made a number of revisions to its outage response and communication protocol. During large scale outages, a centralized communications hub will bring together Operations, Customer Relations and Corporate Communications representatives. This team will ensure internal and external communication in outage situations is both consistent and timely.

A new outage communications software system was deployed late in the 1st quarter. This system, called Informer, provides a number of enhancements, such as customized outage status messages which will improve customer communications.

During the 1st quarter, Newfoundland Power added 24 phone lines to receive customer calls for outage information. This will reduce the number of times customers receive a busy signal when contacting the Company during outages.

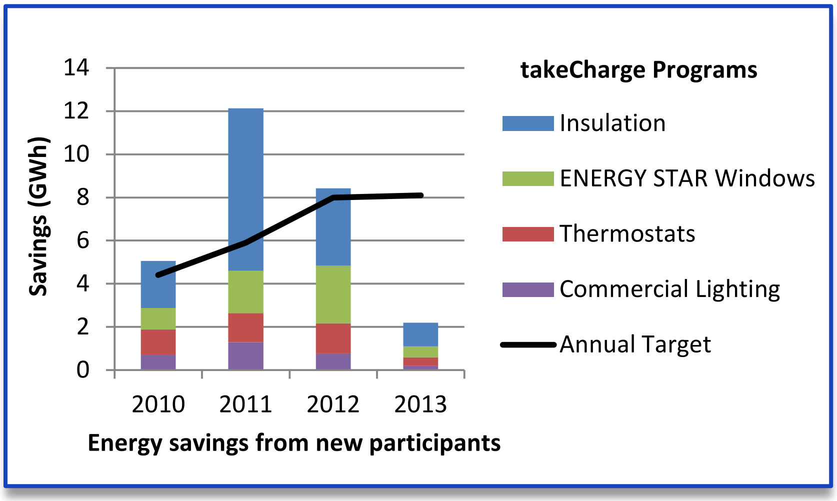


The Informer outage communications system provides a map-based summary of customer outages.

Energy Conservation

	YTD			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Energy Saved (GWh)	2.1	1.7	1.4	8.1

Customer energy savings of approximately 2.1 GWh were achieved in the 1st quarter. Over 1,200 customers participated in Newfoundland Power's takeCHARGE rebate programs.



Customer Outreach

The takeCHARGE team provided customers with energy efficiency advice during a number of events, including the Canadian Home Builders Association Home Show, the Rona Pro Show, 2013 Hospitality Newfoundland and Labrador Trade Show, the Board of Trade Business Development Summit and the Corner Brook Winter Carnival. takeCHARGE also coordinated a promotion on March 23rd at nine participating retailers across the island. Special pricing on ENERGY STAR windows was offered by each retailer, in addition to takeCHARGE rebates.

Home Show 2013, St. John's

In recognition of Earth Hour on March 23rd, the Company turned off lights at its facilities, except where required for safety and security purposes. takeCHARGE also encouraged customer and employee participation in the event.

System Performance

Reliability

	YTD			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Outage hours per customer (SAIDI) [1,2]	0.56	0.65	0.57	2.53
Outages per customer (SAIFI) [1,3]	0.39	0.45	0.45	1.65

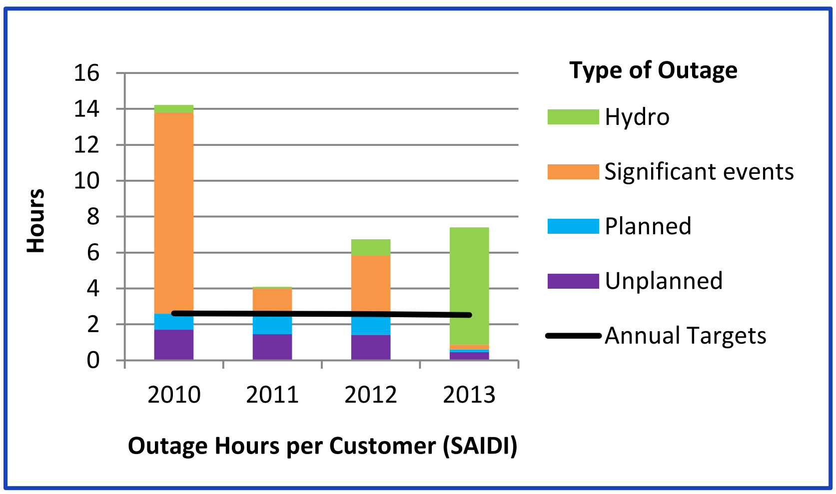
1 System performance statistics exclude interruptions which are Hydro related and those which meet the Canadian Electricity Association definition of significant events.
2 Excludes 0.28 for January 11th storm and 6.52 for loss of Hydro supply.
3 Excludes 0.02 for January 11th storm and 0.96 for loss of Hydro supply.

Loss of supply from Hydro resulted in a power outage for the majority of customers for about 12 hours on January 11th.

On January 11th, electricity supply issues caused outages to approximately 173,000 customers across the island. Hydro experienced transmission and generation problems, including failure of 2 of the 3 generating units at Holyrood. These issues accounted for over 95% of the customer outage hours related to this incident.

Other significant unplanned power interruptions in the 1st quarter included the following:

- On February 4th, a broken conductor, or overhead wire, caused an outage to 711 customers in the Glenwood area resulting in an outage of about 4.5 hours.



- A conductor broke during a snow storm on February 5th, causing an outage for 781 customers in the Springdale area. Due to the difficult weather and night conditions, power was restored to over 60% of affected customers in 4.5 hours, and 99% in 6 hours.

- On February 17th, high winds caused an outage for 2,428 customers in the Paradise area resulting in an outage of about 2.5 hours.

- An outage on March 2nd, caused by a broken conductor, impacted 2,345 customers in the Kilbride area where the outage time for some customers was approximately 4.5 hours.

Electricity Supply

	1st Quarter			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Energy Purchased (GWh) [1]	1,950.5	1,945.5	1,919.3	5,678.4
Peak Demand (MW) [1, 2]	1,350.5	1,330.8	1,293.1	1,330.8
Hydro Plant Production (GWh)	134.3	118.6	118.1	429.0
Plant Availability (%)	97.2	96.0	97.4	96.0

1 Weather adjusted.
2 Peak demand for the 2012/2013 winter period occurred on February 9th, 2013 at 5:45 p.m.

Energy purchased during the 1st quarter was 5.0 GWh higher than plan due to higher than expected electricity sales.

Peak demand for the 2012/2013 winter period occurred on February 9th, 2013 at 5:45 pm and largely reflected residential consumption during a Saturday winter storm. This peak of 1,350.5 MW is higher than plan and is the highest on record for the Company. Demand charges from Hydro are forecast to increase by approximately $1 million as a result. However, operation of the Demand Management Incentive (DMI) limits the increased cost to the Company to approximately $580,000 (1% of test year demand costs).

In the 1st quarter, hydro plant production was 15.7 GWh higher than plan and 16.2 GWh higher than 2012. This was a result of Hydro requests for additional generation from the Company's plants due to issues with supply from Holyrood. Higher production was enabled by higher than normal water inflows to the Company's hydro plant reservoirs. Normal water inflow during this period is 107.3 GWh and the Company experienced a water inflow of 146.7 GWh. Water inflow levels are typically higher in the spring and fall due to snow melt and precipitation.

In the 1st quarter, hydro plant availability was 97.2% which is above plan and comparable to the 1st quarter of 2012. There were 47 forced outages in the 1st quarter compared to 57 experienced in the same quarter last year.

Mobile River Watershed

In 2008, the City of St. John's gave notice of the termination of the Company's rights to use the Mobile River watershed. The termination required the City to pay the Company the value of generation and transmission assets using the watershed. This includes two hydroelectric generation facilities with a combined capacity of 11.6 MW and average annual production of 49 GWh.

The City appealed a 2009 arbitration panel ruling in the Company's favour regarding the procedure for valuation of those assets. In November 2010, the Trial Division of the Supreme Court of Newfoundland and Labrador dismissed the City's application. The City appealed that ruling, and in March 2013, the Court of Appeal set aside the preliminary ruling of the arbitration panel and determined that the assets to be appraised under the lease are limited to the physical works and erections, not including land and water rights. The Company expects to seek leave to appeal the Court of Appeal's decision to the Supreme Court of Canada in the 2nd quarter.

Operations

Distribution Work Dispatch

New technology has been used to schedule and dispatch field work for line crews in St. John's since 2011. Based on the success of this pilot, the Company is centralizing dispatch of line work, including new service connections and trouble call response, for all areas in 2013. This involves changes to work processes, roles and technology supporting operations, and is expected to enable customer service and productivity improvements.

This quarter, enhancements were made to a number of software applications, including the Company's Outage Management and Technical Work Request systems, in order to improve information flow to line crews in the field. This information is accessed by crews through the Click scheduling software and laptop computers in line trucks. Installation of wireless modems is ongoing and will be completed for trucks in Eastern Region in the 2nd quarter and in Western Region in the 3rd quarter. This equipment will provide GPS tracking and real-time connectivity to crews in the field, and is an important step in centralizing work dispatch by year end.

Automated Meter Reading (AMR)

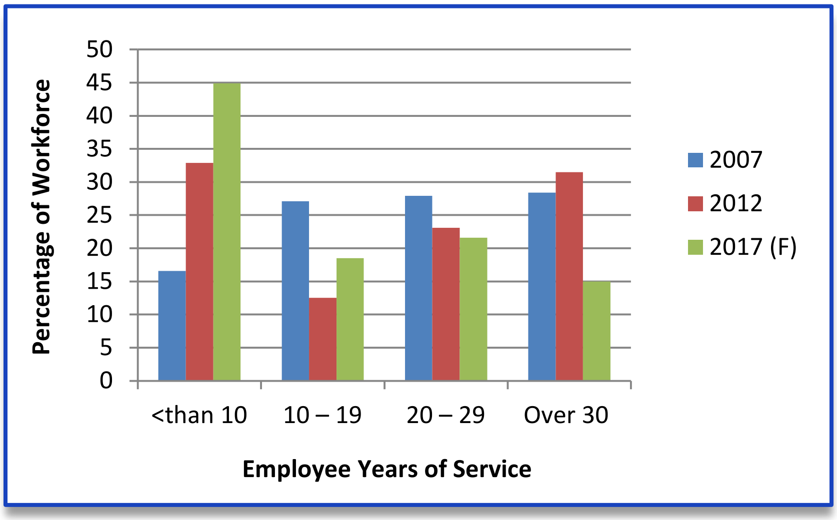
The Company installed 3,600 additional Automated Meter Reading (AMR) meters this quarter. Though fewer meter installations are typically completed in winter, this is consistent with plans to install over 19,000 AMR meters this year. Optimization of meter reading routes has resulted in a reduction of five routes in the 1st quarter. Meter reading labour costs are broadly consistent with plan, and reflect a reduction from 2012 costs.

Installation of a replacement AMR meter

Over the next 5 years, the Company expects to further reduce its meter reading workforce through the deployment of AMR meters. To support existing staff through this transition, the Company has kept them informed of plans for increased use of AMR meters, and has provided workshops on resume writing and interview techniques.

Workforce Management

The Company's employee demographics have changed. In 2007, only 15% of the workforce had less than ten years of service. At the end of 2012, this group represented 33% of the workforce. By 2017, employees with less than ten years of service are estimated to make up 45% of the workforce.



The core technical skills of the Company, engineering and line work, are particularly affected by this change. Currently, approximately 60% of employees in the Power Line Technician (PLT) classification have less than 10 years of service, as do 42% of the Engineering Technologist classification, and 32% of the Engineer classification.

With the increasing numbers of newer employees, and turnover in the front-line supervisory group, the Company is addressing the need to increase employees' technical and leadership skills. A two-day training session for Line Supervisors was held in January 2013 and focused on topics related to safety, leadership and operational skills. In February, similar training was provided for the PLT Lead Hands in the St. John's region. During February and March, training in topics such as conducting infrared inspections, power system modeling, analysis and planning, radio frequency interference and power quality investigations was provided for engineers and engineering technologists.

Capital Program

	YTD			Annual [1]
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Capital Expenditures ($000s)	13,467	14,083	13,938	80,038

[1] Excludes the $750,000 allowance for unforeseen items.

Year to date, capital expenditures were lower than plan primarily due to the timing of payments on equipment supply contracts, such as the new portable substation and the new power transformer for Glendale substation in Mount Pearl.

Activity in the 1st quarter largely involved completion of engineering design and procurement required in advance of the 2nd and 3rd quarter construction season. All 2013 projects are on budget and on schedule, with the exception of distribution project cost increases due to a higher forecast number of new customer connections for the year.

New home construction continues to be strong, though below 2012 levels.

Two 2012 projects were carried over into 2013. Renovations to the Electrical Maintenance Centre building were extended into 2013 when high tender prices required the Company to resubmit the project for PUB approval. As well, a 2012 project to build a new distribution line to replace the submarine cable supplying Charlottetown was delayed due to additional work required to comply with the Parks Canada Environmental Protection Plan.

Environment

	YTD			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Number of Spills [1]	12	18	12	71
Reportable PCB Spills [2]	0	0	0	2

[1] Excludes all third party spills and spills due to significant events. In 2013, there was one third party spill; in 2012 there were no third party spills. In 2013, significant events caused three spills; in 2012, there were none.

[2] PCB spills must be reported if any of the following conditions exist:

- All PCB spills that exceed the one gram rule as per PCB Regulations.
- All oil spills of equipment in storage / inventory (not in use) that exceed a concentration of 2 ppm PCBs regardless of quantity.

Environment Performance

There were 12 spills in the 1st quarter.

For the first quarter of 2013, the number of spills was lower than plan and equal to the same period in 2012. Nine of the spills this quarter were related to Company and contractor vehicle fluid spills (such as hydraulic, transmission and coolant fluids.) The remainder were spills of insulating oil from distribution transformers. The Company began installing stainless steel transformers in 2001 to address the issue of oil spills from rusting transformers. About 50% of the Company's distribution transformers are now stainless steel.

Stainless Steel Transformer

Environment Initiatives

The annual internal review of the Environmental Management System was completed in February and its effectiveness was re-affirmed. Environmental training was provided in the 1st quarter to 40 employees and 49 contractor employees.

Successful emergency preparedness response tests were held at the Heart's Content Hydro Plant and the Electrical Maintenance Centre during the 1st quarter. These types of drills are a routine component of our ISO 14001 based Environmental Management System.

Community Investment

Newfoundland Power's community investment program focuses on supporting the key areas of health and safety, environment and conservation, and education. The Company's employees are involved in their communities, and support community and industry leadership. The Company provides hands-on, in-kind support, combined with corporate donations and sponsorships, valued at approximately $500,000 annually.

The Power of Life Project

The Power of Life Project is the cornerstone of the Company's efforts to improve health care in the province, focusing specifically on cancer care. In the 1st quarter, the Company made a commitment to support the purchase of TrueBeam STx, which will allow patients to access the latest and most advanced radiation treatment technology in the world. Only the third of its kind in Canada, this leading-edge cancer treatment equipment is valued at nearly $6 million.

Employees present a $350,000 donation from the Power of Life Project to the Dr. H Bliss Murphy Cancer Care Centre

On March 13th, the Corner Brook employees presented a cheque for approximately $8,000 to the Dr. H. Bliss Murphy Cancer Care Foundation's Patient Family Support Fund which directly helps cancer patients that are experiencing financial hardship as a result of their diagnosis. This gift was the result of the fundraising efforts that took place in Corner Brook throughout 2012 including events such as the annual snowmobile run, yard sales and barbeques.

Team POWERful raised over $13,000

Bust a Move

On March 23rd, Team POWERful participated in Bust a Move, a fundraiser aimed at supporting breast health in the province. Team POWERful raised over $13,000 and was recognized at the event as the third highest fundraising team. Over $335,000 was raised at this event.

NEWFOUNDLAND POWER
A FORTIS COMPANY

Newfoundland Power Inc.

55 Kenmount Road
P.O. Box 8910
St. John's, NL A1B 3P6
Business: (709) 737-5600
Facsimile: (709) 737-2974
www.newfoundlandpower.com

HAND DELIVERED

August 13, 2013

Board of Commissioners
of Public Utilities
P.O. Box 21040
120 Torbay Road
St. John's, NL A1A 5B2

Attention: G. Cheryl Blundon
Director of Corporate Services
and Board Secretary

Ladies and Gentlemen:

Enclosed are nine copies of Newfoundland Power Inc.'s Quarterly Regulatory Report for the quarter ending June 30, 2013.

The report is divided into five sections: Quarterly Summary; Capital Expenditure Progress; Inter-Company Transactions; Customer Property Damage Claims; and Contribution In Aid of Construction Activity.

If you have any questions on the enclosed, please contact the undersigned at the direct number noted below.

Yours very truly,

for Gerard M. Hayes
Senior Counsel

Enclosures

c. Geoffrey P. Young
Newfoundland & Labrador Hydro

power of life
SUPPORT CANCER CARE. RIGHT HERE.

Quarterly Regulatory Report

For The Period Ended

June 30, 2013

QUARTERLY REGULATORY REPORT

FOR THE PERIOD ENDED

June 30, 2013

INDEX | **TAB**

INDEX	TAB
Quarterly Summary	1
Capital Expenditure Progress	2
Inter-Company Transactions	3
Customer Property Damage Claims	4
CIAC Activity	5

Table of Contents

Highlights 1

Safety 2

Financial & Corporate 4

Customer Service 6

Energy Conservation 8

System Performance 9

Operations 11

Capital Program 13

Environment 14

Community Investment 15

Financial Statements
- Balance Sheets 16
- Statements of Earnings 17
- Statements of Retained Earnings 18
- Statements of Cashflows 19

Appendices
- A Electricity Statistics 20
- B Statements of Electricity Sold (GWh) 21
- C Statements of Revenue 22
- D Summary of Weather Adjustments 23
- E Statements of Earnings - Detail 24
- F Customer and Employee Statistics 25
- G Service Continuity Performance 26

Highlights

	2nd Quarter			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Injury Frequency Rate [1,2]	1.4	1.8	2.7	1.8
Customer Satisfaction (%) [1,3]	85	88	87	88
Outage Hours per Customer (SAIDI) [1,4]	0.98	1.15	0.98	2.53
New Customer Connections	1,244	1,020	1,075	4,657
Electricity Delivery [5]				
Electricity Sales (GWh)	1,287.9	1,287.3	1,259.4	5,763.6
Peak Demand (MW) [6]	1,350.5	1,330.8	1,293.1	1,330.8
Revenue from Rates ($ millions)	131.7	131.4	128.1	586.3
Earnings ($ millions) [7]	24.2[8]	9.4	11.5	48.2[8]

- Three medical aid injuries and one lost time incident have occurred year to date.
- Customer satisfaction was lower than plan and lower than the same quarter last year.
- Year to date customer outage hours were lower than plan and comparable to 2012.[4]
- New customer connections during the quarter remain higher than plan as well as higher than the same quarter last year.
- Electricity sales and revenue in the 2nd quarter were consistent with plan.
- Quarterly earnings were higher than plan primarily due a $12.8 million income tax recovery related to Part VI.I tax, as well as timing of implementation of the PUB order on the Company's 2013/2014 rate case.
- Effective July 1, 2013, there was an overall average decrease in electricity rates of approximately 3.1%. This reflected the combined impact of the annual operation of the Rate Stabilization Account and the impact of the PUB order on the Company's 2013/2014 rate case.

1 Year-to-date performance.
2 Injuries per 200,000 hours worked.
3 General satisfaction result from quarterly customer satisfaction survey.
4 Outage hours exclude January 11th supply loss.
5 Weather adjusted.
6 Peak demand for the 2012/2013 winter period occurred on February 9th, 2013 at 5:45 p.m.
7 Earnings applicable to common shares.
8 Earnings in 2013 include a $12.8 million income tax recovery related to Part VI.I tax.

Safety

	YTD			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Injury Frequency Rate [1,2]	1.4	1.8	2.7	1.8
Public Contact Incidents [2]	17	14	12	29

[1] Injuries per 200,000 hours worked.
[2] Plan and Trend based on historical average.

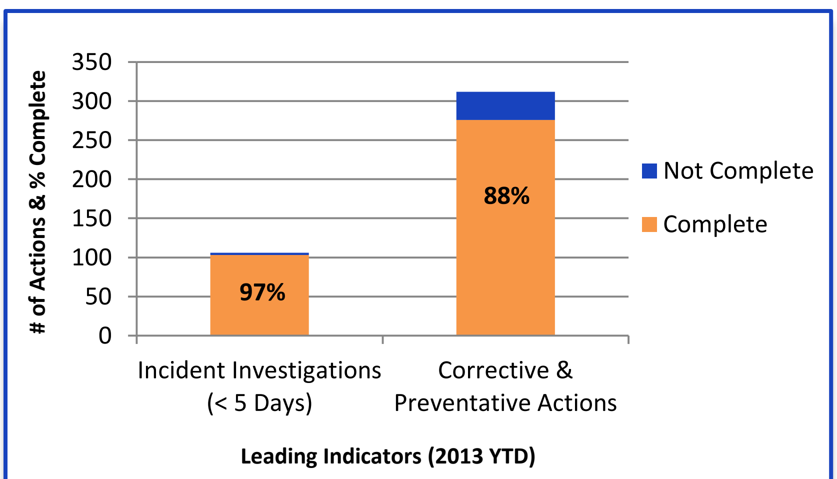
Safety Performance

There have been four injuries YTD compared to eight in the same period in 2012.

Three medical aid injuries occurred during the second quarter. The first injury occurred when a Power Line Technician (PLT) injured his ankle while operating an ATV. The second involved a PLT who slipped on the step of an aerial device bucket and injured his shoulder. The third occurred when a Meter Reader injured her knee while exiting a vehicle.

There was one preventable vehicle accident in the 2nd quarter, compared to three for the same quarter in 2012. There were 19 near miss safety incidents recorded in the 2nd quarter, compared to 14 for the same quarter last year. Follow-up from these incidents included adjustments to safety processes and employee training.

There were 10 public contact incidents in the 2nd quarter, compared to 12 incidents in the 2nd quarter of 2012. Two of the 10 incidents in the 2nd quarter of 2013 were high voltage contacts involving heavy construction equipment. The remaining eight incidents were low voltage contacts involving construction equipment. No injuries were associated with any of these contacts.



Prevention and Training

Investigations of safety incidents and implementation of related recommendations are being completed in a timely manner. Over 300 corrective and preventative measures have been identified year to date, with 88% completed.

More than 80% of the Company's annual safety training requirements were completed by the end of the 2nd quarter. This included high voltage training for PLT Apprentices, development sessions with PLT Lead Hands, and incident investigation training for Safety Advisors.

The senior management safety incident review committee assessed a number of incidents and investigation reports this quarter. Measures implemented as a result included instituting formal competency criteria for project supervisors and initiating revisions to the power line hazards course to expand coverage of underground electrical infrastructure.

The Company continued to promote electrical safety to external groups throughout the 2nd quarter, including presentations to first responders and school children, as well as public safety advertising. Newfoundland Power also participated in meetings with the Fortis operating group regarding safety.

Students at Holy Family School participated in an electricity safety awareness presentation.

Employees representing the Company attended the National Day of Mourning Ceremony held at the Confederation Building on April 28th. This ceremony commemorates workers who have been killed, injured or suffered illness due to workplace related hazards and accidents.

North American Occupational Safety and Health (NAOSH) Week

NAOSH week was celebrated with a combination of safety and health activities from May 6th to May 12th. Safety related activities included work site inspections, work observations, safety training and safety meetings. Health and wellness activities ranged from heart healthy breakfasts and snacks, lifestyle/wellness presentations to fitness walks and strength training workouts. A presentation on the dangers of distracted driving by David Teater of the U.S. National Safety Council was broadcast island-wide for all employees.

Employees, retirees and family members gathered to participate in the Annual Family Safety Night events at their local area offices. Safety for the home and work place was emphasized during demonstrations and activities for all ages.

Financial & Corporate

	2nd Quarter			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Electricity Sales (GWh)	1,287.9	1,287.3	1,259.4	5,763.6
Revenue from Rates ($ millions)	131.7	131.4	128.1	586.3
Purchased Power Costs ($ millions)	80.2	80.5	78.6	389.1
Operating Costs ($ millions)	12.9	13.9	13.4	55.7
Operating Cost [1] per Customer ($)	58	62	57	243
Earnings ($ millions) [2]	24.2[3]	9.4	11.5	48.2[3]

[1] Operating costs including GEC and CDM cost deferrals.
[2] Earnings applicable to common shares.
[3] Earnings in 2013 include a $12.8 million income tax recovery related to Part VI.I tax.

Financial Results

During the 2nd quarter, electricity sales, revenue and purchased power costs were broadly consistent with plan. Electricity sales were 28.5 GWh, or 2.3% higher than 2nd quarter results in 2012. The increase over 2012 reflects growth in residential sales primarily related to new home construction and a higher proportion of electrically heated homes. Commercial sales also increased, largely due to construction activity at the hydromet nickel processing plant in Long Harbour and the gravity based structure for the Hebron oilfield at Bull Arm. Sales were negatively impacted by the closure of the Beaver Brook Antimony Mine in central Newfoundland and the High Liner fish processing facility in Burin.

Operating costs were broadly consistent with plan on an annual basis, though lower than plan for the 2nd quarter. The quarterly variation was primarily due to timing of the implementation of the PUB order on the Company's 2013/2014 rate case (the "Rate Order"), particularly treatment of customer energy conservation program costs. The Rate Order approved deferral of these costs, effective January 1, 2013, but this change was accounted for beginning in the 2nd quarter.

Earnings for the 2nd quarter were higher than plan. This primarily reflects the impact of the $12.8 million income tax recovery associated with Part VI.1 tax. Excluding this impact, the increase was primarily due to (i) timing of the implementation of the Rate Order; (ii) higher interest on the Rate Stabilization Account ("RSA"); and (iii) a lower effective tax rate.

Customer Rates

Effective July 1, 2013, there was an overall average decrease in electricity rates charged to customers of approximately 3.1% to reflect the combined impact of the annual operation of the RSA and the impact of the Rate Order.

The annual operation of Hydro's Rate Stabilization Plan ("Hydro RSP") and the Company's RSA, resulted in an average customer rate decrease of approximately 7.9%, effective July 1, 2013. The implementation of the Rate Order had an impact of increasing electricity rates by an average of approximately 4.8% effective July 1, 2013.

Capital Plan

On June 28, 2013, the Company filed an application with the PUB requesting approval of its 2014 capital expenditure plan totaling $84.5 million. The application is currently under review by the PUB.

Accounting System Upgrade

In June 2013, the Company successfully completed an upgrade to its accounting system, Microsoft Dynamics Great Plains. The last upgrade occurred in October of 2008. Extensive post implementation testing has been completed with no significant issues. The new features of the upgrade will allow for increased efficiency of accounting tasks and improved financial reporting.

Materials Management

During the quarter, the vegetation management contracts were renewed for one year with no increase in cost. The Company also successfully negotiated a contract with Emera to provide line crews in the St. John's Region. This is the first time in decades that the Company will use contractors to do work on energized lines, which provides additional capacity to complete capital projects.

A number of changes were implemented as a result of the ongoing Materials Management review. Replenishment of stock in the area warehouses from Central Stores at Duffy Place in St. John's has been reorganized on a bi-weekly schedule resulting in improved workflows. Full inventory counts and storage reorganization have been completed in 6 of the 8 area warehouses in preparation for new stock tracking and security measures to start next quarter.

Customer Service

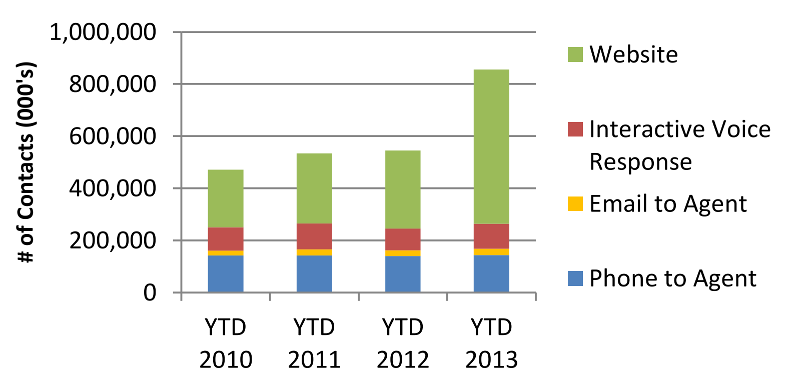
	YTD			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Customer Satisfaction (%) [1]	85	88	87	88
Service Level (%) [2]	81	80	83	80
Customer Self Service (%) [3]	80	72	70	72
Trouble Call Response (%) [4]	84	85	87	85
Street Light Call Response (%) [5]	91	85	83	85

[1] General satisfaction result from quarterly customer satisfaction survey.
[2] % of customer calls answered within 60 seconds.
[3] % of customer contacts via technology (no person to person contact).
[4] % of trouble call response within 2 hours. Excludes impact of January 11th loss of supply.
[5] % of street light call response within 5 days.

Customer Service Performance

Customer satisfaction in the 2nd quarter improved compared to the previous quarter results of 84%, but continue to be lower than plan. Survey results this quarter indicate price, followed by reliability, continue to be the highest concerns for customers. Service level results are slightly higher than plan and consistent with results in the 1st quarter.

Customer self-service results in the 2nd quarter continue to be above plan. During the 1st half of 2013, approximately 80% of customers who contacted the Company chose web or telephone self-service.



Customer Initiated Contacts

Field service, in terms of response to customer trouble calls and streetlight calls, was broadly consistent with plan for the 2nd quarter.

Customer Service Improvements

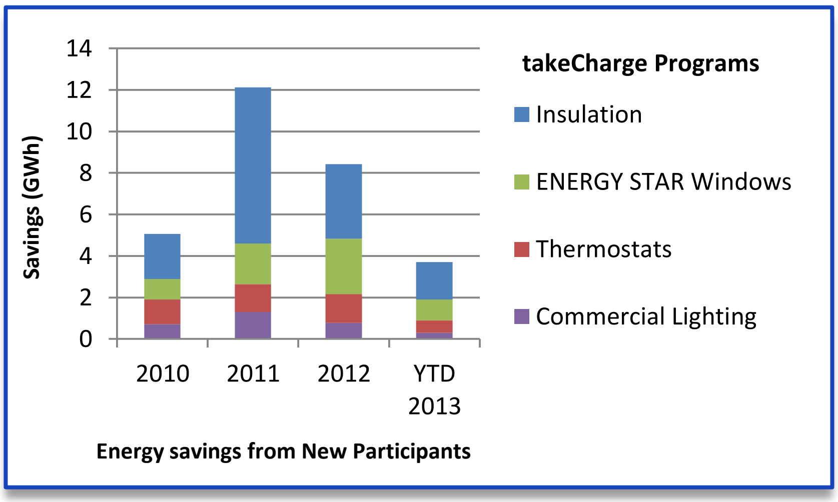
Customer self-service at www.newfoundlandpower.com was enhanced during the quarter with the deployment of multiple payment arrangement capability. This feature allows eligible customers with accounts in arrears to propose multiple payment arrangements on multiple dates. The proposal is immediately evaluated and either accepted or rejected online. This is an improvement over the previous process which required customers to call the Company if multiple payments were required to bring their accounts up to date. Outage queries and payment arrangements are among the most popular web based self-service functions for North American utilities.

To complement the new outage information page provided for customers on the Company website, a new internal outage dashboard was implemented during the 2nd quarter. This provides agents in the Company's customer contact centre with a one-stop resource for all public and internal outage information.

Energy Conservation

	YTD			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Energy Saved (GWh)	3.7	3.3	2.8	8.1

Customer energy savings of approximately 3.7 GWh were achieved to the end of the 2nd quarter. Over 2,200 customers participated in Newfoundland Power's takeCHARGE rebate programs so far in 2013.



Customer Outreach

On April 27th, special pricing on insulation and programmable thermostats was offered by nine retailers across the island in combination with takeCHARGE rebates. The takeCHARGE team also participated in customer outreach events, including the Downhome Lifestyle Expo, the Kent Pro Show, the Corner Brook Home Recreation and RV Show, the Annual Exploits Trade Show, and the Feather and Fin Festival in Stephenville.

Placentia Councilor Kevin Power accepts first prize, takeCHARGE of Your Town Challenge.

The winners of the takeCHARGE of Your Town Challenge were announced at the annual Professional Municipal Administrators Convention and Trade Show in Gander. The Town of Placentia won $7,500 by completing energy efficiency related milestone challenges. The money awarded will be put toward a community greening project.

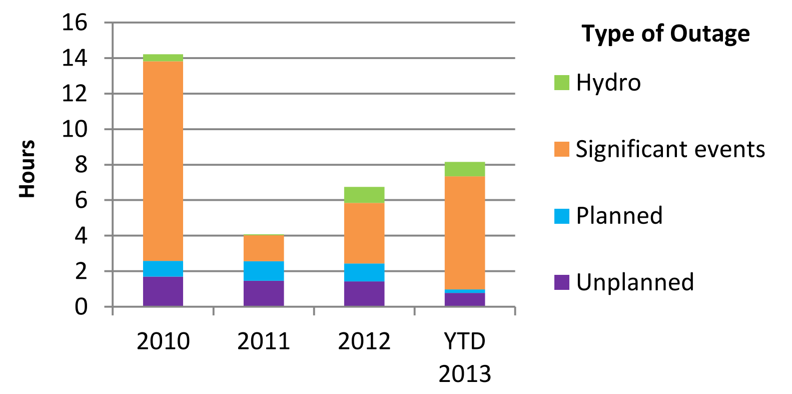
System Performance

Reliability

	YTD			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Outage hours per customer (SAIDI) [1,2]	0.98	1.15	0.98	2.53
Outages per customer (SAIFI) [1,3]	0.80	0.98	0.82	1.65

1 System performance statistics exclude interruptions which are Hydro related and those which meet the Canadian Electricity Association definition of significant events.
2 Excludes 0.28 for January 11th storm and 6.89 for loss of Hydro supply.
3 Excludes 0.02 for January 11th storm and 1.52 for loss of Hydro supply.

In the 2nd quarter, outage hours per customer were lower than plan and consistent with 2012. The number of outages per customer was also lower than plan and consistent with last year. This quarter was relatively quiet in terms of system interruptions, with customers experiencing, on average, 17 minutes of unplanned outage time.



Outage Hours per Customer (SAIDI)

The significant unplanned power interruptions in the 2nd quarter included the following:

- On May 2nd, a broken insulator caused an outage to 1,933 customers in the Village Mall area of St. John's resulting in an outage of about 2 hours.
- On May 18th, a vehicle accident caused a pole to break on a distribution feeder in the Lewisporte area. A section of the feeder was de-energized and the pole replaced after the medical emergency response, which resulted in an outage to 1,209 customers in the area for about 6 ¼ hours.

Electricity Supply

	2nd Quarter			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Energy Purchased (GWh) [1]	1,229.5	1,228.9	1,197.8	5,678.4
Peak Demand (MW) [1, 2]	1,350.5	1,330.8	1,293.1	1,330.8
Hydro Plant Production (GWh)	113.5	130.6	120.9	429.0
Plant Availability (%)	96.0	96.0	95.3	96.0

[1] Weather adjusted.
[2] Peak demand for the 2012/2013 winter period occurred on February 9th, 2013 at 5:45 p.m.

Energy purchased during the 2nd quarter was consistent with plan and 31.7 GWh higher than 2012. This reflects higher electricity sales.

Hydro plant production was 17.1 GWh lower than plan for the 2nd quarter and 7.4 GWh lower than 2012 due to an early spring runoff and lower than normal inflows in the quarter. On the Avalon, water storage levels are currently at reduced levels typically experienced later in the summer season.

In the 2nd quarter, hydro plant availability was equal to plan and consistent with availability in the 2nd quarter of 2012. There were 30 occurrences where plants were unavailable, which was comparable to previous years.

Operations

	YTD			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
New Service Appointments Met (%)	86	85	-	90
Meter Route Reductions	19	11	9	65

Distribution Work Dispatch

In May, the Company began scheduling customer appointments for new service connections in the St. John's region. This is a significant service improvement, and will be expanded to all areas by year end. Early results in St. John's are positive. By the end of June, over 300 appointments had been made, and 86% of these services had been connected as scheduled.

In the Avalon area, installation and training for the mobile dispatch software, ClickMobile, was completed during the quarter. Customer trouble calls in the area are now being dispatched to line crews using this system. Next quarter, all service work for Avalon crews will be dispatched using this system through the new centralized dispatch centre. Wireless communication equipment was installed in line trucks in Eastern Region in the 2nd quarter, providing GPS tracking and real-time connectivity to field crews. By year end all line trucks will be equipped with mobile computing technology, and all trouble calls and new services will be dispatched through the new system.

Automated Meter Reading (AMR)

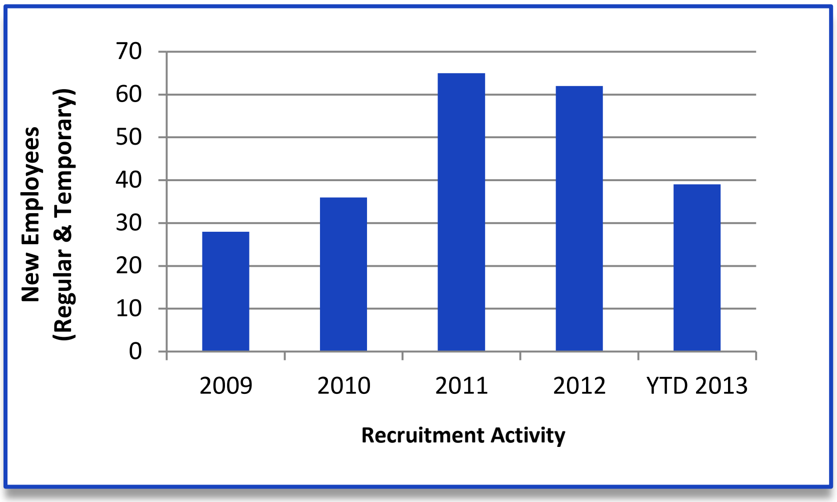
Installation of AMR meters is proceeding on schedule. Route optimization enabled by AMR meters has allowed the Company to eliminate 14 meter reading routes during the 2nd quarter, for a year to date total of 19 route reductions.

Route optimization has eliminated 19 meter reading routes in 2013.

As an interim measure, the Company is utilizing temporary meter readers to complete selected AMR meter installations. Résumé and interview skill workshops were provided to meter reading staff across the island to help prepare them for new job opportunities.

Workforce Management

Recruitment activity in the 1st half of this year remained fairly consistent with the same period last year. Hiring in the 2nd quarter was primarily focused on retirement replacements, particularly in skilled trades such as PLTs. The Company currently employs 41 PLT Apprentices, which is the highest level in decades. In the 2nd quarter, recruiting also included several new positions related to expansion of customer energy conservation programs. Hiring for the remainder of the year is expected to focus on replacement of retiring employees. To date, the number of retirements and their distribution has been consistent with forecast.



Succession planning, leadership and technical training, and knowledge transfer continued to be a focus in the 2nd quarter. Leadership training for Director and Superintendent-level employees began in April. Approximately half of this group has completed two modules in the *Interaction Management: Exceptional Leaders* program from DDI (Development Dimensions International). Lead Hands in the Power Line Technician group, Electrical Maintenance and Generation also participated in supervisory/leadership training, including topics such as employee coaching and recognition, and apprentice development roles and responsibilities.

During the quarter, the Company in conjunction with Hydro received funding of $390,000 under the Canada-Newfoundland and Labrador Labour Market Development Agreement for a three-year project. The purpose is to increase awareness of careers in the electric utility industry. A project manager has been hired, a team established and a detailed work plan developed.

Capital Program

	YTD			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Capital Expenditures ($000s)	34,755	33,050	33,523	80,038

[1] Excludes the $750,000 allowance for unforeseen items.

Year to date capital expenditures were higher than plan. This was primarily related to projects carried over from prior years and higher distribution expenditures related to customer growth. With the exception of distribution expenditures, all 2013 projects are on budget and on schedule.

New duct bank near the St. John's Main Substation along the banks of the Waterford River.

Activity in the 2nd quarter focused on completion of engineering design and procurement required in advance of the construction season.

The Company continues to refurbish the underground distribution system in the St. John's downtown core. Installation has been completed for underground duct banks near the St. John's Main Substation on Southside Road, and new primary distribution cables have been installed in duct banks along Water Street and Harbour Drive.

A new power transformer will be installed in Glendale Substation in Mount Pearl as part of a multi-year project. The transformer was factory tested during the 2nd quarter and is currently in transit from the factory in Taiwan.

Tenders have been awarded and onsite work started for the hydro plant refurbishment projects at New Chelsea and Pittman's Pond.

Environment

	YTD			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Number of Spills [1]	36	36	28	71
Reportable PCB Spills [2]	0	1	0	2

[1] Excludes all third party spills and spills due to significant events. To date in 2013, there were three third party spills; in 2012 there was one third party spill for the same period. In 2013, significant events caused three spills; in 2012, there were none for the same period.

[2] PCB spills must be reported if any of the following conditions exist:
- All PCB spills that exceed the one gram rule as per PCB Regulations.
- All oil spills of equipment in storage / inventory (not in use) that exceed a concentration of 2 ppm PCBs regardless of quantity.

Environment Performance

For the first two quarters of 2013, the number of spills was consistent with plan though higher than the same period in 2012. To date this year, half of the spills were from oil filled electrical equipment and the remainder were the result of fluid spills from Company and contractor vehicles.

Environment Initiatives

Environmental training was provided in the 2nd quarter to 218 employees and 206 contractor employees. Training related to migratory bird protection practices and regulations was a focus of employee training in the quarter.

The Company is committed to managing its activities so as not to impact migratory birds, such as the White Throated Sparrow.

On June 22nd, the Federal government proposed an amendment to the current regulations for polychlorinated biphenyls (“PCBs”). The amendment would extend the existing 2014 deadline to 2025 for elimination of oil containing PCBs in certain electrical equipment. The Company is on track to meet the 2014 deadline, but will monitor the status of the proposed amendment.

Community Investment

In the 2nd quarter, the primary focus of the Company's community involvement continued to be supporting health care in the province, specifically cancer care, and the environment.

The Power of Life Project

The first ever Provincial Hard Hat Drive was held on Saturday, May 25, raising more than $51,000 for cancer care in the province. Funds will support the purchase of equipment at cancer care centres across the island. Over 300 employees, retirees, family members and friends participated at more than 50 locations throughout the island.

On June 15, Newfoundland Power hosted the 7th Annual Ride for Dad. Despite less than ideal weather conditions, the Company welcomed approximately 450 bikes and riders, and helped raise more than $130,000 for prostate cancer research and awareness in Newfoundland and Labrador.

Employee, Bob Cahill, and his children, Jordan and Jack, help out at the Provincial Hard Hat Drive.

EnviroFest 2013

The Company held its 16th annual *EnviroFest* celebrations during National Environment Week, June 2-8, to increase environmental awareness and educate participants about the importance of environment sustainability. Throughout the week, tree planting and beautification projects were held at eight sites throughout the province.

School children release salmon fry as part of the fish friends program.

Fish Friends

As part of its long running sponsorship of the Fish Friends program, the Company has partnered with the Suncor Energy Fluvarium, an environmental education centre located in St. John's, to promote the program for three years starting in 2013. The Fish Friends program teaches children the value of fish stocks and the need to protect them and the environments in which they live. The Fish Friends Salmon Release Day was held on June 13th and was attended by local school children.

NEWFOUNDLAND POWER
A FORTIS COMPANY

Newfoundland Power Inc.

55 Kenmount Road
P.O. Box 8910
St. John's, NL A1B 3P6
Business: (709) 737-5600
Facsimile: (709) 737-2974
www.newfoundlandpower.com

HAND DELIVERED

November 13, 2013

Board of Commissioners
of Public Utilities
P.O. Box 21040
120 Torbay Road
St. John's, NL A1A 5B2

Attention: G. Cheryl Blundon
Director of Corporate Services
and Board Secretary

Ladies and Gentlemen:

Enclosed are nine copies of Newfoundland Power Inc.'s Quarterly Regulatory Report for the quarter ending September 30, 2013.

The report is divided into five sections: Quarterly Summary; Capital Expenditure Progress; Inter-Company Transactions; Customer Property Damage Claims; and Contribution In Aid of Construction Activity.

If you have any questions on the enclosed, please contact the undersigned at the direct number noted below.

Yours very truly,

Gerard M. Hayes
Senior Counsel

Enclosures

c. Geoffrey P. Young
Newfoundland & Labrador Hydro

Quarterly Regulatory Report

For The Period Ended

September 30, 2013

QUARTERLY REGULATORY REPORT

FOR THE PERIOD ENDED

September 30, 2013

INDEX	TAB
Quarterly Summary	1
Capital Expenditure Progress	2
Inter-Company Transactions	3
Customer Property Damage Claims	4
CIAC Activity	5

Table of Contents

Highlights 1

Safety 2

Financial & Corporate 4

Customer Service 6

Energy Conservation 8

System Performance 9

Operations 11

Capital Program 13

Environment 14

Community Investment 15

Financial Statements
- Balance Sheets 16
- Statements of Earnings 17
- Statements of Retained Earnings 18
- Statements of Cashflows 19

Appendices
- A Electricity Statistics 20
- B Statements of Electricity Sold (GWh) 21
- C Statements of Revenue 22
- D Summary of Weather Adjustments 23
- E Statements of Earnings - Detail 24
- F Customer and Employee Statistics 25
- G Service Continuity Performance 26

Highlights

	3rd Quarter			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Injury Frequency Rate [1,2]	0.9	1.8	2.1	1.8
Customer Satisfaction (%) [1,3]	85	88	87	88
Outage Hours per Customer (SAIDI) [1,4]	1.44	1.69	1.59	2.53
New Customer Connections	1,420	1,306	1,359	4,657
Electricity Delivery [5]				
Electricity Sales (GWh)	950.0	959.5	940.4	5,763.6
Peak Demand (MW) [6]	1,350.5	1,330.8	1,293.1	1,330.8
Revenue from Rates ($ millions)	103.7	104.6	99.3	594.2
Earnings ($ millions) [7]	7.5	7.6	8.9	48.2[8]

- No medical aid injuries or lost time incidents occurred in this quarter.
- Customer satisfaction was lower than plan and lower than the same quarter last year.
- Year to date customer outage hours were lower than plan and 2012.[4]
- New customer connections during the quarter remain higher than plan as well as higher than the same quarter last year.
- Electricity sales and revenue in the 3rd quarter were lower than plan but higher than the same quarter last year.
- Quarterly earnings were consistent with plan.

[1] Year-to-date performance.
[2] Injuries per 200,000 hours worked.
[3] General satisfaction result from quarterly customer satisfaction survey.
[4] 2013 outage hours exclude January 11th supply loss and 2012 outage hours exclude tropical storm Leslie.
[5] Weather adjusted.
[6] Peak demand for the 2012/2013 winter period occurred on February 9th, 2013 at 5:45 p.m.
[7] Earnings applicable to common shares.
[8] Earnings in 2013 include a $12.8 million income tax recovery related to Part VI.I tax.

Safety

	YTD			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Injury Frequency Rate [1,2]	0.9	1.8	2.1	1.8
Public Contact Incidents [2]	26	22	27	29

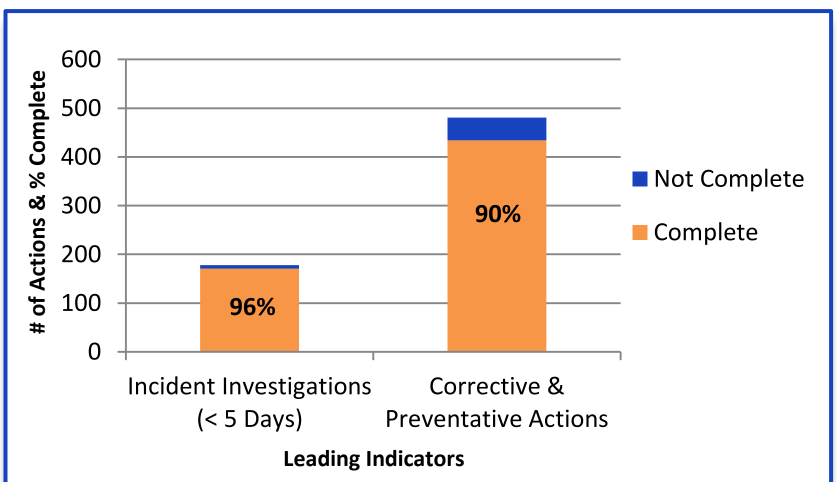
[1] Injuries per 200,000 hours worked.
[2] Plan based on historical average.

Safety Performance

There have been four injuries YTD compared to nine in the same period in 2012.

No lost time or medical aid injuries were recorded during the 3rd quarter. There has been one calendar day lost in 2013 as a result of injury compared to 38 for the same period in 2012. There have been 65 near miss incidents recorded year to date in 2013 compared to 47 for the same period last year. There were seven preventable vehicle accidents in the 3rd quarter, compared to five for the same quarter in 2012. In addition, a line truck collided with a moose that ran across the highway near dusk, resulting in vehicle damage but no injuries.

There were 9 public contact incidents in the 3rd quarter compared to 15 incidents in the same quarter of 2012. Four of these 9 incidents were high voltage contacts. Two involved heavy construction equipment and the others involved a painting contractor and a customer-felled tree. The painting contractor employee received a serious injury from the arc flash that occurred when his elevated mechanical work platform made contact with an energized primary conductor. Five incidents in the 3rd quarter were low voltage contacts involving construction equipment, tree felling, sign installation, excavation and a customer contact with a steel streetlight pole that was intermittently energized. There were no injuries due to these contacts.



Prevention and Training

Safety incident investigations and implementation of related recommendations are being completed in a timely manner. Almost 500 corrective and preventative action items have been identified to date, with 90% completed. More than 90% of the Company's annual safety training requirements were completed by the end of the 3rd quarter.

The Company and Newfoundland and Labrador Hydro ("Hydro") conducted a joint media campaign focussing on the prevention of power line contacts. Local television, radio and newspaper media covered the kick-off event. The media release was also picked up and published in both Canadian and American occupational health and safety magazines.

Newfoundland Power employees instruct kids on electrical and aerial device safety at CLB Camp, Mint Brook.

The Company continued to promote electrical safety throughout the 3rd quarter, including presentations to first responders and school children, and work with other stakeholders in the Public Contact Prevention Working Group.

Two safety videos were completed and are being used for education of contractors. The first video targets Newfoundland Power contractors who may be exposed to electrical hazards. The second promotes contact prevention for general construction and contractor employees. This video is an additional tool for the Company when following up on incidents involving contractors, in addition to letters and discussions.

During the quarter, seven PLT Apprentices from Gander and St. John's participated in high voltage rubber glove training. The Company's trainers for Transportation of Dangerous Goods were also re-certified. These representatives from across the province are now able to train employees in their respective areas.

Hazard Review

The Company conducted its annual safety hazard review in the 3rd quarter. This review confirmed the tasks and hazards associated with the Company's operations, and assessed changes in the level of risk. Action items will be addressed either through the revision of procedures or by inclusion in corporate safety objectives and initiatives. For example, the assessment of risk associated with driving was the catalyst for a vehicle accident prevention program planned for 2014.

Financial & Corporate

	3rd Quarter			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Electricity Sales (GWh)	950.0	959.5	940.4	5,763.6
Revenue from Rates ($ millions)	103.0	104.6	98.2	594.2
Purchased Power Costs ($ millions)	54.1	55.3	53.8	389.1
Operating Costs ($ millions) [1]	12.0	12.2	13.0	55.7
Operating Cost per Customer ($) [2]	52	55	54	243
Earnings ($ millions) [3]	7.5[3]	7.6	8.9	48.2[4]

1 Excluding pension, OPEBs, and early retirement program costs.
2 Operating cost per customer includes GEC and CDM program costs.
3 Earnings applicable to common shares.
4 Earnings in 2013 include a $12.8 million income tax recovery related to Part VI.I tax.

Financial Results

Revenue and purchased power costs for the 3rd quarter were lower than plan primarily as a result of lower than anticipated sales. Electricity sales during the 3rd quarter were 1.0% higher than the same period in 2012. The increase from 2012 reflects growth in residential sales primarily related to new home construction and a higher proportion of electrically heated homes. Commercial sales also increased, largely due to economic growth in the service sector, as well as construction activity on the hydromet nickel processing plant in Long Harbour and the Hebron oilfield gravity-based structure at Bull Arm. Sales were negatively impacted by the closures earlier in 2013of the Beaver Brook Antimony Mine in central Newfoundland and the High Liner fish processing facility in Burin.

Operating costs were lower than plan for the 3rd quarter due to timing of planned work. Operating cost per customer is lower than plan for the 3rd quarter reflecting a slight decrease in operating costs and an increase in the forecasted number of customers.

Earnings for the 3rd quarter were broadly consistent with plan. This reflects lower than anticipated electricity sales partially offset by timing of operating costs and higher interest on the Rate Stabilization Account (“RSA”).

Land Sale

On August 20, 2013, the Company signed an agreement to sell a piece of vacant land in St. John's for a purchase price of $1.45 million. The transaction is scheduled to close on November 29, 2013 and is expected to result in an after-tax gain of approximately $1.2 million.

Customer Rates

Effective July 1, 2013, there was an overall average decrease in electricity rates charged to customers of approximately 3.1% to reflect the combined impact of the annual operation of the RSA and the impact of Newfoundland Power's 2013/14 rate order.

The annual operation of Hydro's Rate Stabilization Plan ("Hydro RSP") and the Company's RSA, resulted in an average customer rate decrease of approximately 7.9%, effective July 1, 2013. The implementation of the rate order resulted in an increase in electricity rates by an average of approximately 4.8% effective July 1, 2013.

Capital Budget

On June 28th the Company requested PUB approval for its 2014 Capital Budget Application totaling $84.5 million. The capital budget was approved by the PUB with no changes on September 13, 2013.

Materials Management

Renovations were completed at several warehouses to create secure areas for high-value, high-volume inventory items, such as conductor, insulators and wooden cross arms. Inventory counts and storage reorganization have been completed at each area warehouse, and improved stock tracking and security measures were implemented during the quarter. In order to optimize overall inventory levels, some inventory from area warehouses was reallocated to the central warehouse at Duffy Place or to job sites in other areas.

Customer Service

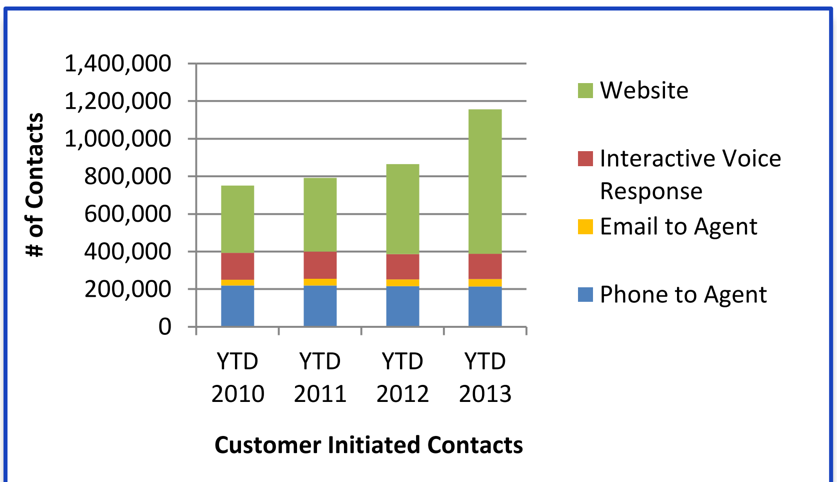
	YTD			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Customer Satisfaction (%) [1]	85	88	87	88
Service Level (%) [2]	80	80	80	80
Customer Self Service (%) [3]	78	72	72	72
Trouble Call Response (%) [4]	84	85	86	85
Street Light Call Response (%) [5]	91	85	86	85

1 General satisfaction result from quarterly customer satisfaction survey.
2 % of customer calls answered within 60 seconds.
3 % of customer contacts via technology (no person to person contact).
4 % of trouble call response within 2 hours. Excludes impact of January 11th loss of supply.
5 % of street light call response within 5 days.

Customer Service Performance

Customer satisfaction continues to be below plan, at 85% year to date. Survey results indicate that customers' top concern is price. In this quarter, an increased number of customers were also concerned with field service related issues. The Company's expanded customer energy conservation programs, and its initiatives to improve the timeliness of field work, address these primary concerns. A review of customer service responsiveness will be completed early in 2014.

Service level results for the customer contact centre are consistent with plan, with 80% of calls being answered within 60 seconds. Customer self-service results in the 3rd quarter continue to be above plan. Approximately 78% of customers who contacted the Company in 2013 chose web or telephone self-service channels. Over 40% of the Company's 760,000 web visits were from mobile devices.



The Company's response to customer streetlight and trouble calls is consistent with plan.

Customer Service Improvements

The Company website was updated to position eBills as the primary billing method for new customers. This is part of the on-going initiative to encourage customers to receive their bills electronically. Over 60,000 customers participate in eBills, which represents 24% of the Company's customer base. The website was also enhanced to allow mobile device users to see 36 months of history for their billing, energy usage and payments.

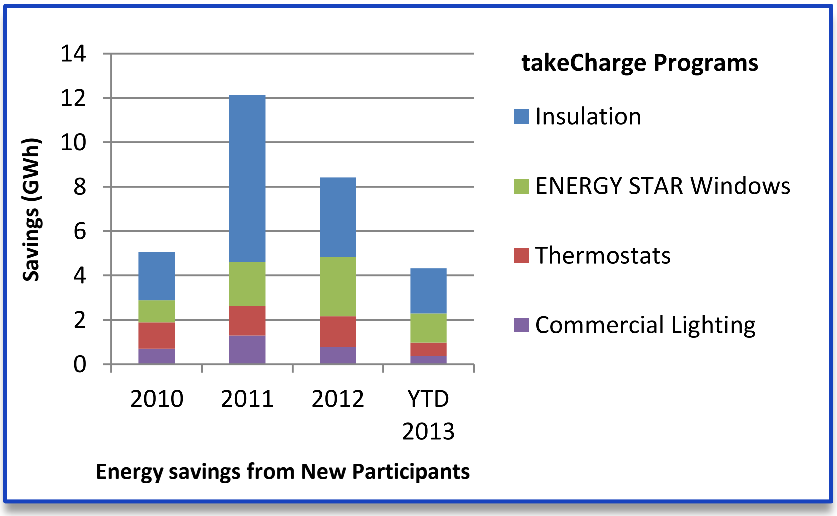
In preparation for the coming storm season, the Company website has been enhanced to allow customers to report a power outage through the website or through a mobile device, without having to speak to a representative.

The Company updated its phone system to allow customers to specify the area for which they want outage information if the phone system is unable to identify the area from which the call originates. Extra phone lines and reconfiguration of the automated menu will also reduce the likelihood of customers receiving a busy signal. In addition, when call volumes are unusually high, employees in other functions will be re-assigned to the customer contact centre to respond to customer inquiries.

Energy Conservation

	YTD			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Energy Saved (GWh)	4.3	4.9	4.4	8.1

Customer energy savings of approximately 4.3 GWh were achieved to the end of the 3rd quarter. Approximately 2,800 customers have participated in Newfoundland Power's takeCHARGE rebate programs to date in 2013.



Expanded takeCHARGE customer energy conservation programs were launched on September 15th. A new program promoting high efficiency heat recovery ventilators ("HRVs") for residential customers will allow all homeowners, regardless of heat source, to participate in the takeCHARGE rebate programs.

Krista Langthorne distributes information packages at the installers preview of the new HRV residential rebate program.

As well, the high efficiency lighting program for commercial customers was expanded to promote retrofit of lights in "high bay" buildings, such as warehouses and garages.

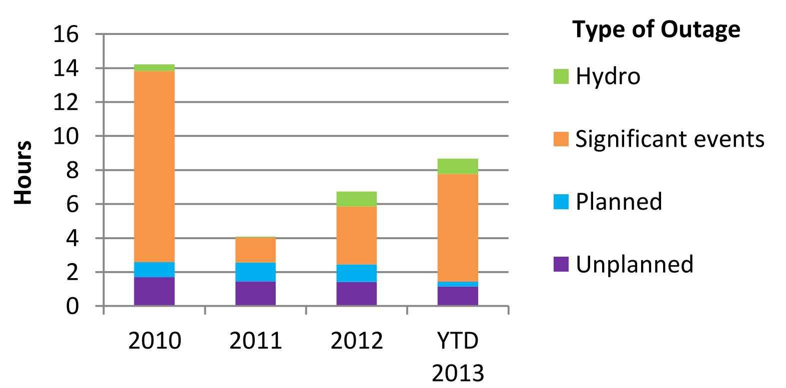
The Company continued to work with retailers offering special pricing and rebates for insulation and programmable thermostats. The takeCHARGE team also participated in a number of customer outreach events, including a number of festivals and tradeshows, and a special preview of the HRV program for installers.

System Performance

Reliability

	YTD			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Outage hours per customer (SAIDI) [1,2]	1.44	1.69	1.59	2.53
Outages per customer (SAIFI) [1,3]	1.19	1.24	1.16	1.65

[1] System performance statistics exclude interruptions which are Hydro related and those which meet the Canadian Electricity Association definition of significant events.
[2] 2013 excludes 0.28 for January 11th storm and 6.89 for loss of Hydro supply; 2012 excludes 3.13 for tropical storm Leslie.
[3] 2013 excludes 0.02 for January 11th storm and 1.52 for loss of Hydro supply; 2012 excludes 0.27 for tropical storm Leslie.



Outage Hours per Customer (SAIDI)

In the 3rd quarter, outage hours per customer were lower than plan. This quarter was relatively quiet in terms of system interruptions, with customers experiencing, on average, 26 minutes of unplanned outage time.

The significant unplanned power interruptions in the 3rd quarter included the following:

- On July 15th, a breaker failure caused an outage to 6,025 customers in and around Mount Pearl resulting in an outage of about 1 ¼ hours.
- On July 15th, a broken insulator caused an outage to 8,477 customers in and around Mount Pearl resulting in an outage of about 2 hours.
- On August 17th, a transmission line jumper which was incorrectly installed by a contractor caused an outage to 1,109 customers in the Bonavista area for about 6 hours.
- On September 9th, a tree fell into a distribution line causing an outage to 453 customers in the North Shore Bay of Islands area for over 3 hours.

Electricity Supply

	3rd Quarter			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Energy Purchased (GWh) [1]	928.9	942.8	917.4	5,678.4
Peak Demand (MW) [1, 2]	1,350.5	1,330.8	1,293.1	1,330.8
Hydro Plant Production (GWh)	84.4	67.4	35.1	429.0
Plant Availability (%)	96.0	96.0	93.4	96.0

1 Weather adjusted.
2 Peak demand for the 2012/2013 winter period occurred on February 9th, 2013 at 5:45 p.m.

Energy purchased during the 3rd quarter was 13.9 GWh lower than plan. This reflects lower than expected electricity sales.

Energy production from the Company's plants was 17 GWh higher than plan for the 3rd quarter due to slightly higher than normal water inflows. Production for the 3rd quarter was 49.3 GWh higher than in 2012, when we experienced an extremely dry summer.

In the 3rd quarter, hydro plant availability was consistent with plan and higher than the 3rd quarter of 2012.

Operations

	YTD			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
New Service Appointments Met (%)	84	85	-	90
Meter Route Reductions	43	33	13	65

Distribution Work Dispatch

In the 3rd quarter, the Company continued expansion of scheduling and dispatch technology throughout its operating areas. Wireless communication equipment was installed in line trucks in Western Region. All Company line trucks are now equipped with GPS tracking and real-time connectivity.

Dispatch of trouble calls and streetlight work is now being done through the new system in all areas. In the 4th quarter, centralized electronic dispatch will be expanded to include new services and other service-related work in all areas. Scheduling of customer appointments for new services will be expanded to all operating areas at the same time. Crew performance in meeting customer appointments in the St. John's area so far this year is broadly consistent with plan.

Automated Meter Reading (AMR)

The Company installed over 9,700 Automated Meter Reading ("AMR") meters this quarter, for a total of nearly 22,000 year to date. The plan for 2013 is to complete 29,000 AMR meter installations, resulting in overall AMR penetration of 42%.

Route optimization has eliminated 43 meter reading routes in 2013.

This has enabled optimization of meter reading routes and elimination of 43 routes this year, an improvement compared to the plan of 33 routes. As a result, meter reading cost reductions are slightly more than plan for the year. In areas with highly concentrated AMR penetration (ie. over 85% AMR), the Company has recently begun using new meter reading technology which allows readings to be collected four to five times faster than the current average.

Workforce Management

To date in 2013, 23 employees have retired, which is fewer than plan. The Company had anticipated up to 41 retirements to occur in 2013. Employees' choice to defer their retirement can provide the Company with further opportunity to engage in knowledge transfer programs.

Recruitment activity to date in 2013 reflects this lower level of required retirement replacements as well as several new hires related to operations scheduling and dispatch, customer service, and corporate relations initiatives.

During the 3rd quarter, a market review of group insurance benefits was completed to ensure plans remain cost effective and competitive. Proposals were requested from insurance carriers, with the assistance of our benefits consultants, Aon Hewitt. The Company will remain with its current service providers, Medavie Blue Cross and SSQ Insurance Company. Reduced rates were negotiated for all core benefits except travel, which had no change, and Accidental Death and Dismemberment, which had an increase of 4.4%. In addition, health premium rates are guaranteed until April 2015 and all other core benefits until April 2016.

The Company revised its Early and Safe Return to Work Program, which supports injured or ill employees' return to their pre-injury or pre-illness occupation. The program ensures consistency and incorporates processes for occupational (work-related) and non-occupational (not work-related) illnesses and injuries. The program maintains the Company's long established commitment to working with injured or ill employees. It has been supported by the IBEW and training will be rolled out to all supervisors in the 4th quarter.

Also in the 3rd quarter, the Company launched the annual "*Walk the Line*" fitness challenge. Participating employee teams walk or run the equivalent of the Island's transmission lines (2,000 km). This program is part of a portfolio of wellness initiatives available for employees.

Health Connection Program Participation

	2011	2012	2013[1] YTD
Influenza Vaccines	180	200	-[2]
Gym & Fitness Reimbursements	117	111	67[3]
Smoking Cessation Support	10	6	3
Blood Collection Services	168	219	153
***Walk the Line* Fitness Program**	-	100	81
Peer Power & At Work Weight Watchers	25	36	52

1 Up to and including September 20, 2013.
2 Clinics scheduled for October.
3 Fitness reimbursements typically increase in Q4.

Capital Program

	YTD			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Capital Expenditures ($000s)	56,904	54,823	54,033	80,038

[1] Excludes the $750,000 allowance for unforeseen items.

Year to date capital expenditures were higher than plan. This was primarily related to projects carried over from prior years due to delayed approvals. Expenditures related to customer growth and substation in-service failures were also higher than plan. These increases were partially offset by reductions in the cost of distribution transformers and the cost of installing a new 25 MVA power transformer at the Glendale substation in Mount Pearl.

During the 3rd quarter a number of projects were completed, including the installation of the new power transformer at Glendale substation. This additional transformer will serve load growth resulting from an increase in residential and commercial development in the Mount Pearl area. Construction work for the substation refurbishment and modernization projects in Twillingate and Glenwood in Central Newfoundland was also completed.

New energy efficient turbine runner for New Chelsea plant.

Refurbishment of the New Chelsea hydro plant is ongoing. The new turbine runner has been manufactured and is being shipped, and the stator, rotor and exciter are being overhauled at a facility in Ontario. Reassembly of the generator is scheduled to be completed in November.

Rebuilding transmission line 12L from Memorial University to Kings Bridge Road is a 2 year project undertaken in 2013 and 2014. Construction of 1.1 km was completed in the 3rd quarter as planned with only minor sidewalk restoration remaining to be completed. Rebuilding of transmission line 110L on the Bonavista Peninsula was completed in October.

The Company is preparing to replace the submarine cable system which serves Bell Island customers. Following a tender for supply and installation of the cable that closed on October 18, 2013, the Company is re-evaluating the options for replacement of the cable system. A request for PUB approval of the project is expected to be filed in late 2013. Installation of a new cable system is scheduled to be completed in Fall 2014.

Environment

	YTD			Annual
	Actual 2013	Plan 2013	Actual 2012	Plan 2013
Number of Spills [1]	52	54	66	71
Reportable PCB Spills [2]	0	1	0	2

[1] Excludes all third party spills and spills due to significant events. To date in 2013, there were six third-party spills; in 2012 there were two third-party spills for the same period. In 2013, significant events caused three spills; in 2012, there were eight for the same period.

[2] PCB spills must be reported if any of the following conditions exist:

- All PCB spills that exceed the one gram rule as per PCB Regulations.
- All oil spills of equipment in storage / inventory (not in use) that exceed a concentration of 2 ppm PCBs regardless of quantity.

Environment Performance

The number of spills was lower than plan and lower than 2012. The volume spilled is down year to date, with 684 litres spilled in 2013 compared to 1,480 litres spilled for the same period last year; however, there were two significant spills in 2012.

Environment Initiatives

Recent renovations at the Company's offices in Carbonear revealed the presence of mould in the building. Remediation measures required the temporary relocation of office staff to leased space in Bay Roberts. Further work has since identified the presence of asbestos in some of the building materials. This will add further complexity and expense to the project. The Company is also communicating with affected employees to allay any health concerns.

This quarter, 61 employees and 200 contractor employees attended environmental training.

Newfoundland Power partnered with the City of St. Johns and other community organizations to mark National Tree Day. This event serves as a celebration of the benefits that trees provide, including clean air, natural surroundings and wildlife habitat.

PCB Regulations

Newfoundland Power remains on track to comply with federal regulations regarding the removal of polychlorinated biphenyls ("PCBs") from certain substation equipment by 2014.

Community Investment

The Power of Life Project

Supporting health care in the province continued to be the focus of the Company's community involvement in the 3rd quarter. On July 9th, Grand Falls-Windsor employees joined the Dr. H. Bliss Murphy Cancer Care Foundation and Fortis Properties to officially launch the new Garden of Hope in Grand Falls-Windsor. Newfoundland Power employees in this area have raised over $20,000 to support the Garden, which is located at the Central Health Cancer Centre.

Again this year, Newfoundland Power supported Camp Delight, an annual weeklong camp for children and their families who have been affected by cancer. On August 8th, employees from St. John's and Carbonear participated in adventure-themed activities with 60 young camp attendees. Newfoundland Power has been supporting Camp Delight for 18 years by purchasing backpacks for the campers and by making a $5,000 annual donation from *The Power of Life Project.* The annual donation is the equivalent of sending 10 children to camp.

Two golf tournaments are held annually in September in support of *The Power of Life Project*. Stephenville area employees held their 5th annual charity golf tournament. A total of 38 community partners and 19 teams participated in the event, raising over $6,000. Clarenville area employees held their 8th annual golf tournament. The event brought out 60 golfers, raising approximately $11,000.

Partners for Life

On July 5th and September 3rd, the Company organized two successful onsite blood donor clinics at Duffy Place. The themes included "Bring a Buddy Day" and "The Amazing Blood Race – Kenmount vs Duffy Challenge". To date in 2013, 239 blood donations have been collected – 80% of the Company's annual pledge.

Employee Jenny Wadden donates blood with a helping hand from Buddy the Puffin.

Employees in Our Communities

Three Newfoundland Power employees were recognized by the Canadian Electricity Association with 2013 Lifesaving Awards. Two Power Line Technicians, Horace Crocker and Neville Gosse, provided emergency first aid which saved the life of a young motorcycle rider who had been in a collision. In a separate incident, another Power Line Technician, Jim Cox, recognized the signs of a heart attack in a flag person at a job site, and got him to hospital for treatment.

Newfoundland Power Inc.

55 Kenmount Road
P.O. Box 8910
St. John's, NL A1B 3P6
Business: (709) 737-5600
Facsimile: (709) 737-2974
www.newfoundlandpower.com

HAND DELIVERED

February 13, 2014

Board of Commissioners
of Public Utilities
P.O. Box 21040
120 Torbay Road
St. John's, NL A1A 5B2

Attention: G. Cheryl Blundon
Director of Corporate Services
and Board Secretary

Ladies and Gentlemen:

Enclosed are nine copies of Newfoundland Power Inc.'s Quarterly Regulatory Report for the quarter ending December 31, 2013.

The report is divided into five sections: Quarterly Summary; Capital Expenditure Progress; Inter-Company Transactions; Customer Property Damage Claims; and Contribution In Aid of Construction Activity.

If you have any questions on the enclosed, please contact the undersigned at the direct number noted below.

Yours very truly,

Gerard M. Hayes
Senior Counsel

Enclosures

c. Geoffrey P. Young
Newfoundland & Labrador Hydro

Quarterly Regulatory Report

For The Period Ended

December 31, 2013

QUARTERLY REGULATORY REPORT

FOR THE PERIOD ENDED

December 31, 2013

INDEX	TAB
Quarterly Summary	1
Capital Expenditure Progress	2
Inter-Company Transactions	3
Customer Property Damage Claims	4
CIAC Activity	5

Table of Contents

Highlights 1

Safety 2

Financial & Corporate 4

Customer Service 6

Energy Conservation 8

System Performance 9

Operations 12

Capital Program 14

Environment 15

Community Investment 16

Financial Statements
- Balance Sheets 17
- Statements of Earnings 18
- Statements of Retained Earnings 19
- Statements of Cashflows 20

Appendices
- A Electricity Statistics 21
- B Statements of Electricity Sold (GWh) 22
- C Statements of Revenue 23
- D Summary of Weather Adjustments 24
- E Statements of Earnings - Detail 25
- F Customer and Employee Statistics 26
- G Service Continuity Performance 27

Highlights

	4th Quarter			Annual	
	Actual 2013	Plan 2013	Actual 2012	Actual 2013	Plan 2013
Injury Frequency Rate [1,2]	1.1	1.8	0.7	1.1	1.8
Customer Satisfaction (%) [1,3]	86	88	87	86	88
Outage Hours per Customer (SAIDI) [1,4]	2.23	2.53	2.44	2.23	2.53
New Customer Connections	1,475	1,392	1,637	5,280	4,657
Electricity Delivery [5]					
Electricity Sales (GWh)	1,583.0	1,579.1	1,538.8	5,763.3	5,763.6
Peak Demand (MW) [6]	1,350.5	1,330.8	1,293.1	1,350.5	1,330.8
Revenue from Rates ($ millions)	165.8	165.3	155.0	594.7	594.2
Earnings ($ millions) [7]	10.7	10.8	9.3	49.4[8]	48.2[8]

- One medical aid injury and one lost time injury occurred in this quarter.
- Customer satisfaction was lower than plan though it continued to improve each quarter in 2013.
- Year to date customer outage hours were lower than plan and 2012.[4]
- New customer connections during the quarter were higher than plan but lower than the same quarter last year.
- Electricity sales and revenue were consistent with plan for the year.
- Annual earnings were higher than plan.

[1] Year-to-date performance.
[2] Injuries per 200,000 hours worked.
[3] General satisfaction result from quarterly customer satisfaction survey.
[4] 2013 outage hours exclude January 11th supply loss and 2012 outage hours exclude tropical storm Leslie.
[5] Weather adjusted.
[6] Peak demand for the 2012/2013 winter period occurred on February 9th, 2013 at 5:45 p.m.
[7] Earnings applicable to common shares.
[8] Earnings in 2013 include a $12.8 million income tax recovery related to Part VI.I tax.

Safety

	Annual		
	Actual 2013	Plan 2013	Actual 2012
Injury Frequency Rate [1,2]	1.1	1.8	1.7
Public Contact Incidents [2]	34	29	37

1 Injuries per 200,000 hours worked.
2 Plan based on historical average.

Safety Performance

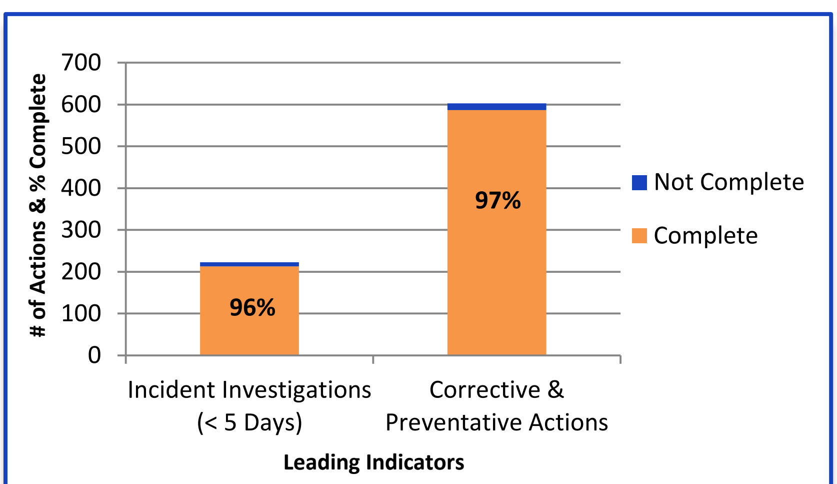
Six employee injuries occurred in 2013. This was the best safety performance in Company history.

During the 4th quarter, one lost time injury and one medical aid injury were recorded. Both of these injuries were caused by slips in snowy conditions. This resulted in 15 calendar days lost due to injury in 2013, compared to 59 in 2012. There were 21 preventable vehicle accidents in 2013, compared to 19 in 2012. There have been 70 near miss incidents in 2013 compared to 60 in 2012.

There were 34 public contact incidents in 2013 compared to 37 incidents in 2012. Seven incidents occurred in the 4th quarter, 2013. Of these, 3 involved high voltage contacts with heavy construction equipment. The remaining four incidents were low voltage contacts involving construction equipment, residential maintenance and snow clearing activities. No injuries occurred due to these contacts.

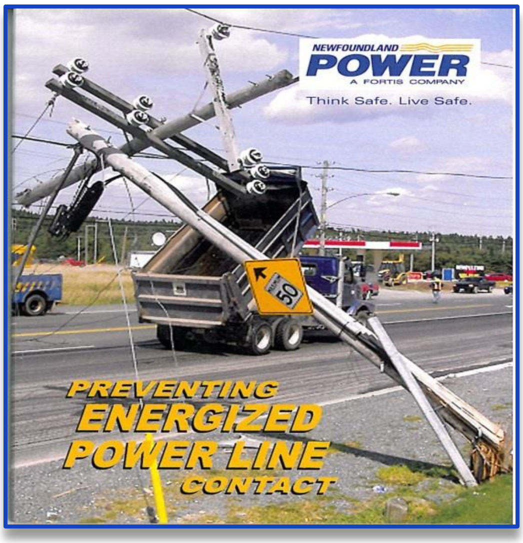
Prevention and Training

Investigation of safety incidents and implementation of the resulting recommendations are being completed in a timely manner. Approximately 600 corrective and preventative safety action items were identified in 2013 with 97% completed.



By the end of the 4th quarter, approximately 95% of the

Company's annual safety training requirements were completed. Training included high voltage switching, chain saw safety and hearing conservation.



The Newfoundland Power video *Preventing Energized Power Line Contact* is now being used by a number of utilities and other organizations. Production of a fall protection rescue video was completed during the 4th quarter.

The Company continued to promote electrical safety through presentations and other initiatives with the Public Contact Prevention Working Group. In the quarter, 161 firefighters attended the firefighting electrical safety seminars, for a total of 300 fire fighters in 2013. The Hazard Hamlet safety presentation was provided to 120 students in the quarter, bringing the total to over 1,400 students this year.

Safety and Environment Audit

Cappa Management Inc. completed a three week audit of the Company's safety and environment systems and compliance. The audit confirmed the Company's conformance with the OHSAS 18001 safety management and the ISO 14001 environmental management standards, as well as conformance with all applicable legislation.

OH&S Compliance

In October, the provincial Occupational Health and Safety Division ("OHSD") issued a directive regarding a traffic control violation when a contractor in Corner Brook used a non-compliant stop/slow paddle. This was corrected and no further actions are required.

Safety Monitoring and Management

During the 4th quarter, the Company purchased new safety management software that provides enhanced abilities to track and manage safety programs. Implementation of the system has started and will continue through April 2014.

Contractor Safety Management

Company Executive and Managers met with executives of the Company's high risk contractors to discuss safety performance and reinforce everyone's commitment to safety. This resulted in agreement to increase communication and improve safety compliance efforts.

Financial & Corporate

	4th Quarter			Annual	
	Actual 2013	Plan 2013	Actual 2012	Actual 2013	Plan 2013
Electricity Sales (GWh)	1,583.0	1,579.1	1,538.8	5,763.3	5,763.6
Revenue from Rates ($ millions)	165.8	165.3	155.0	594.7	594.2
Purchased Power Costs ($ millions)	111.1	109.7	106.0	390.2	389.1
Operating Costs ($ millions) [1]	15.0	14.1	15.4	55.7	55.7
Operating Cost per Customer ($) [2]	67	60	63	243	243
Earnings ($ millions) [3]	10.7	10.8	9.3	49.4[4]	48.2[4]

1 Excluding pension, OPEBs, and early retirement program costs.
2 Operating cost per customer includes GEC and CDM program costs.
3 Earnings applicable to common shares.
4 Earnings in 2013 include a $12.8 million income tax recovery related to Part VI.I tax.

Financial Results

Electricity sales in the 4th quarter of 2013 were slightly higher than plan on a weather adjusted basis. Actual sales for the 4th quarter were 10% higher than the same period in 2012, primarily reflecting cold weather conditions, particularly in November and December 2013.

Annual sales were consistent with plan, resulting in 2% sales growth over 2012.

Operating costs were higher than plan for the 4th quarter due to timing of planned work and the cost of storm response in late November in Central Newfoundland. On an annual basis, operating costs were consistent with plan.

Earnings for the 4th quarter were broadly consistent with plan. There was an increase in earnings of $1.2 million related to an after-tax gain on the sale of land. This was offset by higher purchased power costs and higher operating costs in the quarter.

Earnings for the year were higher than plan. This primarily reflects the after-tax gain on the land sale.

Employee Future Benefit Obligations

Changes in discount rates have a significant impact on the Company's pension and other post-employment benefits ("OPEBs") obligations. The discount rate used to determine the projected pension benefit obligation was 5.0% as at December 31st, 2013, compared to 4.4% as at December 31st, 2012. This resulted in a $17.3 million actuarial gain. The discount rate used to determine the projected OPEBs obligation was 4.9% as at December 31st, 2013, compared to 4.3% as at December 31st, 2012. This resulted in a $4.2 million actuarial gain. These discount rate impacts were partially offset by a change in expected asset returns (6.5% to 6.25%) and assumptions regarding employee and retiree mortality rates, effective December 31st, 2013, due to new recommendations released by the Canadian Institute of Actuaries.

The cumulative impact of these changes on Newfoundland Power's 2014 employee future benefit costs will be to reduce costs by approximately $0.8 million from 2013 costs. Variances in employee future benefit costs for 2014 from that reflected in customer rates are flowed through the pension expense variance deferral account and the other post-employment benefits variance account.

Materials Management

Physical control of inventory has been improved with the completion of changes to inside storage organization and physical barriers, as well as several exterior yard improvements. Infrequently used stock items have been reviewed with operations staff and several items were eliminated.

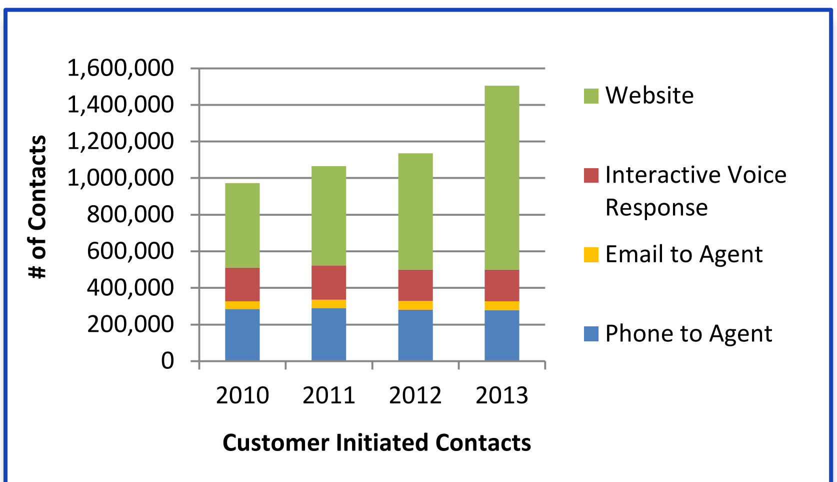
Due to recent retirements, six of the Company's 15 materials handling staff now have less than one year of experience. Knowledge transfer to these new staff is a focus, including defining core competency requirements and developing training materials. The average years of service for this group is forecast to continue to decrease from over 21 years in 2013 to less than 4.5 years by 2017.

Customer Service

	Annual		
	Actual 2013	Plan 2013	Actual 2012
Customer Satisfaction (%) [1]	86	88	87
Service Level (%) [2]	80	80	80
Customer Self Service (%) [3]	78	72	71
Trouble Call Response (%) [4]	85	85	85
Street Light Call Response (%) [5]	89	85	86

1 General satisfaction result from quarterly customer satisfaction survey.
2 % of customer calls answered within 60 seconds.
3 % of customer contacts via technology (no person to person contact).
4 % of trouble call response within 2 hours. Excludes impact of January 11th loss of supply.
5 % of street light call response within 5 days.

Customer Service Performance



Annual customer satisfaction results are below plan. In the 1st quarter 2013, customer satisfaction was impacted by reliability concerns, likely reflecting outages due to loss of supply from Hydro in January. However, customer satisfaction results continued to improve throughout the year, coming in at 88% in the 4th quarter. Customers indicated increased satisfaction with price, reliability and field service in the 4th quarter.

Service level results for the Customer Contact Centre are consistent with plan, with 80% of calls being answered within 60 seconds.

Customer self-service results in the 4th quarter continue to be above plan. Approximately 78% of customers who contacted the Company in 2013 chose web or telephone self-service channels. Over 1 million visits were made to the Company's website and more than 42% were made using a mobile device. Electronic correspondence made gains throughout the year and approximately 25% of customers now receive their bills electronically.

The Company's response to customer streetlight and trouble calls is consistent with plan.

Total write-offs related to customer accounts receivable are consistent with recent years at 0.16% of revenue, or $950,000 in 2013. There were 2 enquiries to the PUB related to the Company's collection activities.

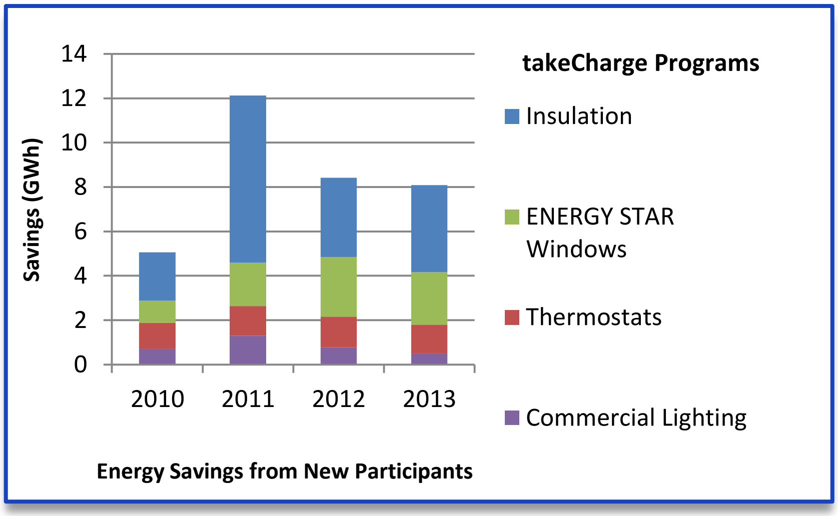
Customer Service Improvements

Newfoundland Power implemented improvements to the service contact process for building contractors, enabling more proactive identification and prioritization of requirements such as licenses, permits and easements. The new process has resulted in immediate benefits in reduced call durations and field service wait times. Requests from electricians to temporarily disconnect and reconnect services are also being centralized and managed through the Company's Customer Contact Centre. Further improvements in this area are planned in 2014.

Customer Service System improvements in the 4th quarter enabled customers' equal payment plan requests via the Company's web site to be processed automatically, with no involvement of customer service staff.

Energy Conservation

	Annual		
	Actual 2013	Plan 2013	Actual 2012
Energy Saved (GWh)	8.1	8.1	8.4



Approximately 5,250 customers participated in Newfoundland Power's takeCHARGE rebate programs in 2013. Energy savings from new participants of approximately 8.1 GWh were achieved to the end of the 4th quarter, which is consistent with plan.

Energy Efficiency Week, held October 19 to 25th, included special offers on insulation and thermostats. The "Are You an Energy Efficiency Super Saver?" contest encouraged customers to post a self-portrait of their favourite way to save energy to win an electronics prize pack valued at $2,500.

Students from Swift Current Academy, Hazelwood Elementary and Catalina Elementary attend Kids in Charge events.

The takeCHARGE Business Efficiency Program was launched on November 1st. This new program offers financial incentives to business customers based on energy savings from energy efficiency project proposals, as well as rebates for specific products. Rebates are currently available for programmable thermostats, energy efficient shower heads, occupancy sensors and LED wall packs.

The K-I-C (Kids in Charge) Start School Program was introduced at a number of schools across the province during the quarter. The program was developed to build energy efficiency awareness from kindergarten to grade six.

System Performance

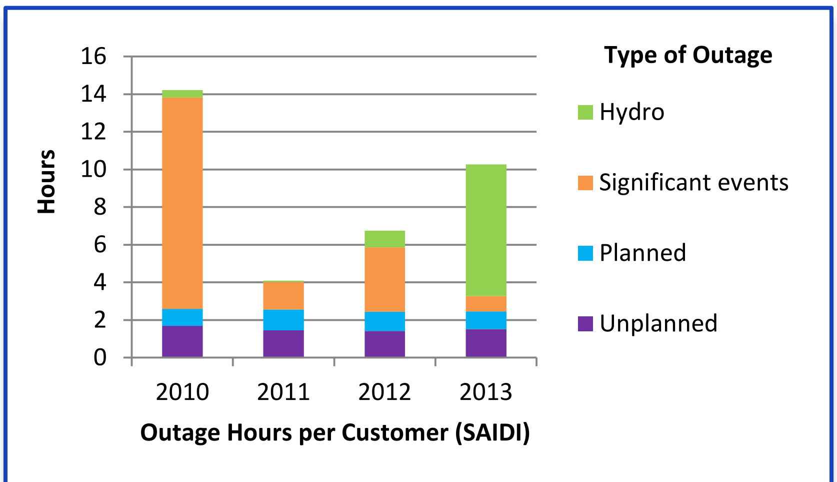
Reliability

	Annual		
	Actual 2013	Plan 2013	Actual 2012
Outage hours per customer (SAIDI) [1,2]	2.23	2.53	2.44
Outages per customer (SAIFI) [1,3]	1.71	1.65	1.72

1 System performance statistics exclude interruptions which are Hydro related and those which meet the Canadian Electricity Association definition of significant events.

2 2013 excludes 7.27 for January 11th storm and loss of Hydro supply, 0.54 for November 21st storm and 0.22 for legislated PCB phase out. 2012 excludes 3.13 for tropical storm Leslie and 0.30 for legislated PCB phase out.

3 2013 excludes 1.61 for January 11th storm and loss of Hydro supply, 0.09 for November 21st storm and 0.21 for legislated PCB phase out. 2012 excludes 0.27 for tropical storm Leslie and 0.13 for legislated PCB phase out.



The Company's 2013 outage hours per customer are lower than plan and lower than 2012, excluding loss of Hydro supply and other significant events.

A severe winter storm struck Western and Central Newfoundland on Thursday, November 21st, 2013. Heavy wet snow and high winds caused severe damage to the electricity system in Central Newfoundland, including failure of 39 distribution poles and transmission structures. The storm also caused power interruptions in Western Newfoundland. There were over 12,000 customers without electricity at the peak of the storm and in total approximately 8 million customer-minutes of outage were experienced. Due to system damage affecting the Badger area, the mobile diesel generator was relocated from Port aux Basques to Badger and began serving customers on Friday, November 22nd. Restoration of power to all customers was completed on Sunday, November 24th. Costs to repair electricity system damage and restore service to customers were approximately $0.5 million.

Other significant unplanned power interruptions in the 4th quarter included the following:

- On October 17th, a faulty insulator caused an outage to 3,913 customers in Mount Pearl and the west end of St. John's resulting in an outage of about 4 hours.

- On November 2nd, an insulated pole guard fell off a newly installed pole, allowing the pole to contact an energized line, which caused an outage of approximately 1.5 hours to 2,718 customers in the Cowan Heights area of St. John's.

- On November 20th, a broken insulator caused an outage to 2,216 customers in Mount Pearl which ranged from 1 to 4 hours.

- On November 28th, a tree fell into a distribution line breaking a conductor and causing an outage to 618 customers in the Victoria Cove area. Restoration took approximately 7 hours due to the back-country location and occurrence of multiple system problems during high winds at that time.

- On December 4th, 8,714 customers were without power for 39 minutes due to a faulty substation breaker in the west end of St. John's.

- On December 15th, a floating phase caused an outage to 1,868 customers in the Goulds area for approximately 2 hours.

- On December 19th, a broken conductor in the substation yard caused a 5 hour outage to 823 customers in the Webber's Cove area.

- On December 26th, an insulator failure caused an outage to 1,207 customers in the Marystown area for over 3 ½ hours.

Electricity Supply

	4th Quarter			Annual	
	Actual 2013	Plan 2013	Actual 2012	Actual 2013	Plan 2013
Energy Purchased (GWh) [1]	1,569.2	1,561.1	1,510.0	5,678.1	5,678.4
Peak Demand (MW) [1, 2]	1,350.5	1,330.8	1,293.1	1,350.5	1,330.8
Hydro Plant Production (GWh)	110.3	112.4	115.5	442.6	429.0
Plant Availability (%)	86.9	95.9	92.9	93.0	95.9

1 Weather adjusted.
2 Peak demand for the 2012/2013 winter period occurred on February 9th, 2013 at 5:45 p.m.

Energy purchased during the 4th quarter was 8.1 GWh higher than plan. This reflects higher than expected electricity sales. Annual energy purchased and electricity sales were consistent with plan.

Hydro plant production was broadly consistent with plan in the 4th quarter. Annual water inflows were higher than normal enabling annual hydro plant production of 442.6 GWh, or 13.6 GWh more than plan. Hydro plant availability was below plan and lower than in 2012, primarily due to several plants being out of service longer than anticipated for planned capital projects. Freezing temperatures in December also resulted in ice-related availability issues at some of the Company's hydro plants.

Operations

	Annual		
	Actual 2013	Plan 2013	Actual 2012
New Service Appointments Met (%)	83	90	-
Meter Route Reductions	62	65	13

Distribution Work Dispatch

All Newfoundland Power line trucks are now equipped with GPS location tracking and real time connectivity, and all trouble calls and streetlight requests are being dispatched to crews electronically. New service connections are being dispatched electronically in five of the Company's eight operating areas, with the last three areas scheduled to be online in 1st quarter 2014.

Customer appointments for new service connections were expanded throughout the Avalon and Burin Peninsulas in the 4th quarter. Appointment booking will be expanded to all areas in 1st quarter 2014. Performance in meeting customer appointments was below plan in 2013. This reflects learning in implementing this new process, and balancing planned and unplanned work requirements. In particular, crews had to be redeployed to respond to higher than expected levels of unplanned work in the St. John's area late in the year, including trouble calls, and disconnect and reconnect requests. During this period, the number of new customer connections was also higher than anticipated.

Automated Meter Reading (AMR)

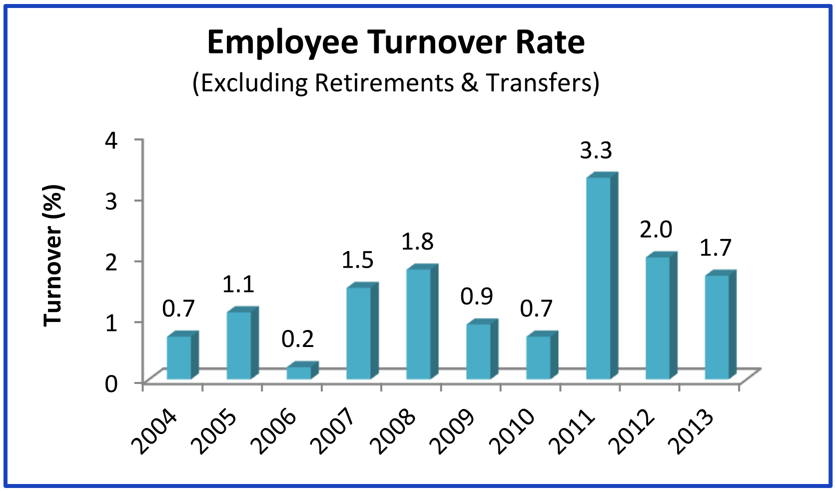
Drive-by meter reading technology allows a single meter reader to read up to 4,000 AMR meters per day, compared to the current daily average of 400 meters.

Over 29,000 AMR meters were installed in 2013, resulting in overall AMR penetration of 41%. While the number of route reductions was slightly lower than plan, meter reading labour costs were $130,000 lower than 2012. This reflects elimination of 62 meter reading routes, as well as use of more efficient drive-by meter reading technology.

Workforce Management

Recruitment activity continued to be brisk in 2013 with 65 new regular and temporary employees hired. This is reflective of the increased level of retirements (26 for 2013) which are anticipated to continue for several years. As well, additional hires were required to address operations scheduling and dispatch initiatives, customer service demands and an increased focus on energy conservation.

Other than retirement, turnover among the Company's regular employees continues to be relatively low. The turnover rate was 1.7% for 2013, and averaged 1.4% for the past decade.



Leadership training continued in the 4th quarter, with 27 Directors and Superintendents attending two half day leadership sessions, "Resolving Workplace Conflict" and "Reaching Agreement". In addition, 62 supervisory staff attended training on two newly revised programs, "Early and Safe Return to Work" and "Employee Recognition".

An internal customer service training needs assessment was completed in the 4th quarter. The results are being used to customize training which will begin in 2014.

Capital Program

	Annual	
	Actual 2013	Plan[1] 2013
Capital Expenditures ($000s)	82.9	80.0

[1] Excludes the $750,000 allowance for unforeseen items.

Capital expenditures in 2013 were $82.9 million which was approximately $2.9 million above plan. This reflects higher than expected customer growth, partially offset by a delay in the delivery of the new portable substation and lower than anticipated expenditures to complete the Glendale transformer project. During 2013, there were 5,280 new customer connections. This was approximately 13% higher than the 2013 budget estimate of 4,657.

In 2013, the Company completed a capital project to increase the transformer capacity in the Mount Pearl and Southlands areas with the installation of a new 25 MVA substation power transformer at Glendale Substation. The Company also undertook capital projects to refurbish the New Chelsea and Pitman's Pond hydro plants. As part of these refurbishments the turbines for both generators were replaced with more efficient models increasing the combined annual production of the two plants by approximately 1.7 GWh.

Throughout 2013, the Company continued its program to rebuild its oldest and most deteriorated transmission lines, including 12L from King's Bridge Substation to Memorial University and 110L from Clarenville to Lockston Substation on the Bonavista Peninsula. The rebuild of all Bonavista Peninsula transmission lines is now complete, concluding approximately $11.0 million in expenditures since 2006.

New Three Island Pond Spillway Structure

Other major capital projects that were completed in the 4th quarter include:

- Refurbishment of dams at Soldier's Pond and Three Island Pond; and
- Substation refurbishment projects at Glenwood, St. Catherine's and Stephenville.

The capital cost to repair damage caused by the severe winter storm in Western and Central Newfoundland in November was approximately $0.5 million. The Company notified the PUB of this unforeseen expenditure on December 12th, 2013. On December 20th, 2013, the PUB approved the $14.5 million replacement of the Bell Island submarine cable system in 2014.

Environment

	Annual		
	Actual 2013	Plan 2013	Actual 2012
Number of Spills [1,2]	73	71	77
Reportable PCB Spills [3]	0	2	0

[1] Excludes all third party spills and spills due to significant events. In 2013, there were eleven third-party spills; in 2012 there were six. In 2013, significant events caused three spills; in 2012, there were eight.

[2] In 2013, 767 litres were spilled compared to 1,791 litres in 2012; however, two significant spills of 1,015 litres in total occurred in 2012.

[3] PCB spills must be reported if any of the following conditions exist:
- All PCB spills that exceed the one gram rule as per PCB Regulations.
- All oil spills of equipment in storage / inventory (not in use) that exceed a concentration of 2 ppm PCBs regardless of quantity**.**

Environment Performance

The total number of spills in 2013 was slightly higher than plan, but lower than 2012. There were no reportable PCB spills in 2013.

An audit of the Company's environmental management system and compliance to legal requirements was completed in the 4th quarter. The audit confirmed compliance.

Auditors meet with employees at the Horse Chops Plant.

Environmental Initiatives

A member of the public contacted Department of Fisheries and Oceans ("DFO") regarding possible pollution during the construction of a culvert at the Kenmount Road Substation. DFO Enforcement Officers concluded proper measures were utilized.

The Company completed two successful emergency response preparedness drills during the 4th quarter to ensure personnel are ready in the event of any spills or environmental emergencies.

PCB Regulations

Newfoundland Power continues to be on track to comply with federal regulations regarding the removal of polychlorinated biphenyls ("PCBs") from identified substation equipment during 2014.

Community Investment

Health Care in the Province

Through the *Power of Life Project*, Stephenville employees donated a blanket warmer and ice machine, valued at over $5,000, to the chemotherapy room at the Sir Thomas Roddick Hospital. In the 4th quarter, employees in Corner Brook organized their second yard sale this year, raising a total of $2,600 for the *Power of Life Project*.

To celebrate the first *Giving Tuesday* in Newfoundland and Labrador, on Tuesday, December 3rd, 2013, the Company launched a *Giving Tuesday* social media challenge. Thousands participated and "liked" our Facebook page. For every new "like", the Company donated $1 to cancer care, resulting in a $3,000 donation to the Dr. H. Bliss Murphy Cancer Care Foundation.

Employee participation in the Partners for Life Program resulted in over 300 blood donations in 2013, surpassing our annual pledge amount. In the 10 years since Newfoundland Power began supporting this program, nearly 3,000 lifesaving blood donations have been made.

Christmas Parades

The holiday spirit was evident as employees, retirees and family members participated in Christmas Parades throughout the province.

In St. John's, volunteers walked the parade route, collecting over 22,000 pounds of food valued at approximately $55,000 and more than $10,000 in cash donations, all in support of the Community Food Sharing Association.

Employees, retirees and family members at the beginning of the Downtown St. John's Christmas Parade.

NEWFOUNDLAND POWER
A FORTIS COMPANY

Newfoundland Power Inc.

55 Kenmount Road
P.O. Box 8910
St. John's, NL A1B 3P6
Business: (709) 737-5600
Facsimile: (709) 737-2974
www.newfoundlandpower.com

HAND DELIVERED

May 15, 2014

Board of Commissioners
of Public Utilities
P.O. Box 21040
120 Torbay Road
St. John's, NL A1A 5B2

Attention: G. Cheryl Blundon
Director of Corporate Services
and Board Secretary

Ladies and Gentlemen:

Enclosed are nine copies of Newfoundland Power Inc.'s Quarterly Regulatory Report for the quarter ending March 31, 2014.

The report is divided into five sections: Quarterly Summary; Capital Expenditure Progress; Inter-Company Transactions; Customer Property Damage Claims; and Contribution In Aid of Construction Activity.

If you have any questions on the enclosed, please contact the undersigned at the direct number noted below.

Yours very truly,

Gerard M. Hayes
Senior Counsel

Enclosures

c. Geoffrey P. Young
Newfoundland & Labrador Hydro

Telephone: (709) 737-5609 *Email: ghayes@newfoundlandpower.com* *Fax: (709) 737-2974*

Quarterly Regulatory Report

For The Period Ended

March 31, 2014

NEWFOUNDLAND POWER
A FORTIS COMPANY

QUARTERLY REGULATORY REPORT

FOR THE PERIOD ENDED

March 31, 2014

INDEX **TAB**

INDEX	TAB
Quarterly Summary	1
Capital Expenditure Progress	2
Inter-Company Transactions	3
Customer Property Damage Claims	4
CIAC Activity	5

Table of Contents

Highlights 1

Safety 2

Customer Service 4

Financial & Corporate 6

Energy Conservation 8

System Performance 9

Operations 11

Capital Program 13

Environment 14

Community Investment 15

Financial Statements
- Balance Sheets 16
- Statements of Earnings 17
- Statements of Retained Earnings 18
- Statements of Cashflows 19

Appendices
- A Electricity Statistics 20
- B Statements of Electricity Sold (GWh) 21
- C Statements of Revenue 22
- D Summary of Weather Adjustments 23
- E Statements of Earnings - Detail 24
- F Customer and Employee Statistics 25
- G Service Continuity Performance 26

Q1/2014 QUARTERLY REGULATORY REPORT

Highlights

	1st Quarter			Annual
	Actual 2014	Plan 2014	Actual 2013	Plan 2014
Injury Frequency Rate [1]	0.6	1.5	0.7	1.5
Customer Satisfaction (%) [2]	82	87	84	87
Outage Hours per Customer (SAIDI) [3]	0.79	0.79	0.56	2.41
New Customer Connections [4]	893	940	1,141	4,685
Electricity Delivery [5]				
Electricity Sales (GWh)	1,999.8	1,965.9	1,942.4	5,823.4
Peak Demand (MW) [6]	1,343.3	1,347.8	1,350.5	1,347.8
Revenue ($millions)	207.8	202.7	194.2	610.6
Earnings ($millions) [7]	10.2	10.2	6.9	36.3

- One lost-time incident occurred in the quarter.
- The majority of customers experienced extended outages due to loss of electricity supply from Newfoundland and Labrador Hydro (Hydro) over the period January 2nd-8th.
- Customer satisfaction was lower than plan for the 1st quarter. A decline in general satisfaction levels likely reflects recent electricity system events. Customer satisfaction related to service interactions with the Company remains strong.
- Customer outage duration was higher than the same quarter last year. This reflects persistent wind and winter storm conditions through the 1st quarter 2014.
- New customer connections were approximately 5% lower than anticipated and 20% lower than the same period last year.
- Electricity sales in the 1st quarter were higher than plan.
- Quarterly earnings were consistent with plan, reflecting higher sales, revenue and operating expenses.

1 Injuries per 200,000 hours worked.
2 Result from quarterly customer satisfaction survey.
3 System performance statistics exclude interruptions which are Hydro related and those which meet the Canadian Electricity Association definition of significant events; excludes 0.53 for January blizzard and 9.00 for loss of Hydro supply.
4 Number of new customer connections during the period.
5 Weather adjusted.
6 Peak demand for the 2013/2014 winter period occurred on March 5th, 2014 at 7:15 a.m.
7 Earnings applicable to common shares.

Safety

	YTD			Annual
	Actual 2014	Plan 2014	Actual 2013	Plan 2014
Injury Frequency Rate [1,2]	0.6	1.5	0.7	1.5
Preventable Vehicle Accidents	4	4	6	15
Public Contact Incidents	5	8	7	30

[1] Injuries per 200,000 hours worked.
[2] Plan based on historical average.

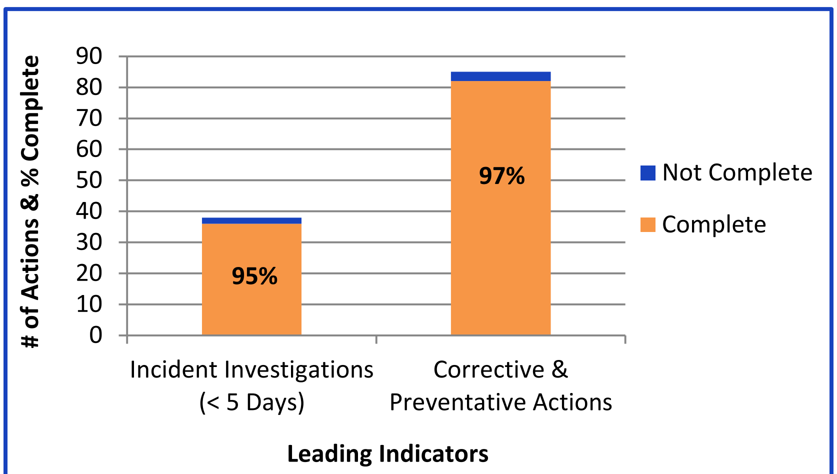
Safety Performance

There was 1 lost time injury and no medical aid injuries during the quarter.

During the 1st quarter, one lost time injury occurred when an employee injured his leg during an arc flash incident. This resulted in 85 calendar days lost year to date. There was 1 calendar day lost for the same period in 2013. There were four preventable vehicle accidents in the 1st quarter, compared to six for same quarter in 2013. There were 13 near miss incidents recorded in the 1st quarter compared to 26 for the same quarter in 2013. Follow-up from these incidents has been initiated to prevent recurrence.

There were five public contact incidents in the 1st quarter, compared to seven for the same quarter last year. Two of the incidents in 2014 were high voltage contacts involving heavy construction equipment. The remaining three incidents were low voltage contacts involving construction equipment and a snow plow contacting service wires. There were no injuries associated with any of these contacts.

Prevention and Training



Safety incident investigations and implementation of related recommendations are being completed in a timely manner. At the end of the 1st quarter, 85 corrective and preventative action items have been identified, with 97% completed. 36% of the Company's annual safety training requirements were completed during the quarter.

Newfoundland Power employee completing substation switching

The Company conducted its annual internal review of the Health & Safety Management System in the 1st quarter and confirmed the effectiveness of the system. The Company's safety performance for 2013 was reviewed as were the major safety initiatives planned for 2014. These include changes to the worker protection code, switching order approval and substation switching competency.

Newfoundland Power continued to promote electrical safety during the 1st quarter through advertising and presentations. Approximately 1,100 students from 20 elementary schools across the province participated in electrical safety presentations. 169 volunteer fire fighters attended the Company's fire fighting and electricity seminars. Through participation in the Public Contact Prevention Working Group, the Company met with various industry stakeholders, giving presentations on electrical safety and public contacts. The Company presented at the Heavy Civil Association annual conference and participated in the Newfoundland and Labrador Construction Safety Association conference.

The Workplace, Health, Safety and Compensation Commission has decided to use Newfoundland Power's *Preventing Energized Power Line Contact* video, produced in 2013, as part of the provincial power line hazard training.

Customer Service

	YTD			Annual
	Actual 2014	Plan 2014	Actual 2013	Plan 2014
Customer Satisfaction (%) [1]	82	87	84	87
Service Level (%) [2]	79	80	81	80
Customer Self Service (%) [3]	95	78	84	78

[1] General satisfaction result from quarterly customer satisfaction survey.
[2] % of customer calls answered within 60 seconds.
[3] % of customer contacts via technology (no person to person contact).

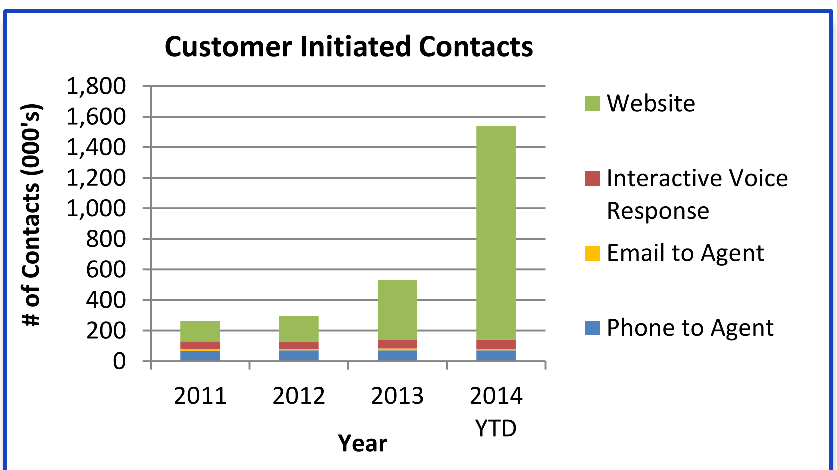
Customer Service Performance

The January 2nd-8th loss of supply incident had a significant impact on the Company's customer service operations. Service performance was also impacted by the persistent cold and windy winter weather through the quarter, which led to higher customer bills and higher than normal volume of billing-related inquiries.

From January 2nd-8th, there were 947,219 website visits compared to just over 1 million for all of 2013.

Customer satisfaction in the 1st quarter was lower than plan and lower than last year. General satisfaction levels for all customers declined this quarter, which likely reflects the impact of customer outages in the quarter. Satisfaction levels remain strong for customers who have had service interactions with the Company.

There was a significant increase in customer self-service due to customers' use of the Company's website during the January loss of supply incident. Mobile devices accounted for 41% of the 947,219 website visits made during the January 2nd-8th outage period. The Customer Contact Centre was open 24 hours a day from 7:00 am on January 4th until 5:00 pm on January 7th and agents answered approximately 26,000 calls during the event.



As of March 31st, approximately 65,000 customers, or 25% of the Company's total customers, are participating in ebills. This compares to 55,000 customers in the 1st quarter of 2013.

Customer Service Improvements

This year's loss of supply event tested all of the improvements made following the January 2013 loss of supply event. The implementation of a centralized communications hub provided timely and consistent information to customers via the IVR, website, media, social media and the customer contact center agents. The capability for customers to report an outage via the website and via mobile devices marked a significant improvement in customer communications over previous outage events. As well, the contact centre phone capacity was increased by over 25% and an extended call-in list of employees improved capacity to answer customer calls. This reduced the number of unanswered calls during this event to approximately 33,000, compared to over 100,000 during the January 2013 event.

Residential Energy Rebate

During the 1st quarter, the Provincial Government finalized its audit of the Residential Energy Rebate program, which the Company has administered on the Government's behalf since October 2011. This was the 1st audit completed since inception of this program. The audit determined that some ineligible customers received rebates amounting to approximately $350,000 from October 2011 through January 2014. The assessed amount is less than the 1% of all rebates issued to customers since the creation of the program.

The 446 affected customers were advised in late March 2014 that the amount they are required to repay will be added to their April 2014 electricity bill. Customers most affected included building contractors, small business operators holding residential accounts in business names, and short-term rental units.

Every Connection Counts

In January, the Company launched the "Every Connection Counts" internal communications campaign which seeks to renew the Company's focus on delivering customer service excellence and continuing to make it easier for customers to do business with us. All employees, regardless of department and responsibility, play an important role in creating positive experiences and lasting impressions for customers.

During the week of February 3rd, consultants were onsite to kick off the Every Connection Counts customer service excellence training. The two and a half day course was delivered to a pilot group of 14 employees who helped finalize content and delivery. This group will deliver the training to other employees.

Financial & Corporate

	1st Quarter			Annual
	Actual 2014	Plan 2014	Actual 2013	Plan 2014
Electricity Sales (GWh)	1,999.8	1,965.9	1,942.4	5,823.4
Revenue ($ millions)	207.8	202.7	194.2	610.6
Purchased Power Costs ($ millions)	149.6	146.4	144.8	395.7
Operating Costs ($ millions) [1]	17.8	15.6	15.9	57.7
Operating Cost per Customer ($)	75	67	67	250
Earnings ($ millions) [2]	10.2	10.2	6.9	36.3

[1] Excluding pension and OPEBs costs.
[2] Earnings applicable to common shares.

Financial Results

Electricity sales were 33.9 GWh, or 1.7%, higher than plan and 57.4 GWh, or 3.0%, higher than 1st quarter results in 2013, on a weather-adjusted basis. The increase reflects growth in residential sales primarily related to new home construction and a higher proportion of electrically heated homes. Commercial sales also increased, largely due to construction activity related to the gravity based structure for the Hebron oilfield at both the Bull Arm and Marystown sites. In addition, sales were positively impacted by the addition of a number of new facilities in St. John's including a new residence at Memorial University, a public transportation facility in St. John's, a long term care facility and the construction of a number of office buildings. Sales were negatively impacted by reduced construction activity at the hydromet nickel processing plant in Long Harbour.

Actual sales for the 1st quarter were 9.1% higher than the same period in 2013, which is reflective of the colder weather conditions experienced in 2014.

During the 1st quarter, revenue and purchased power costs were higher than plan and 2013 primarily due to higher electricity sales. The revenue increase over 2013 also reflects the change in customer rates effective July 1, 2013.

Operating costs for the 1st quarter were $2.2 million higher than plan, primarily due to labour costs. The Company experienced a significant increase in labour associated with system restoration and customer service efforts following the shortage of generation supply from Hydro in January 2014, as well as labour required for distribution maintenance, largely due to weather conditions experienced through the 1st quarter.

Earnings for the 1st quarter were consistent with plan. The impact on earnings due to higher sales was offset by the increase in operating expenses.

PUB Inquiry Relating to January 2014 Outages

During the period January 2nd-8th, 2014, shortages in available generation, a blizzard and electrical system disruptions caused significant power outages to customers. On January 17th, 2014, the Board informed Newfoundland Power there would be an investigation and hearing into the supply issues and power outages on the Island Interconnected System. In Order No. P.U. 3(2014), the Board established a procedure for the investigation which included a requirement for Newfoundland Power to file a report addressing interim issues.

On March 24th, 2014, the Company filed a report addressing the January events. This report included customer impacts, Newfoundland Power's customer communications and response to the supply issues and power outages, as well as the operational relationship between Newfoundland Power and Hydro. In addition, the report specifically addressed possible Island Interconnected System changes to enhance preparedness for the 2014-2016 winter seasons.

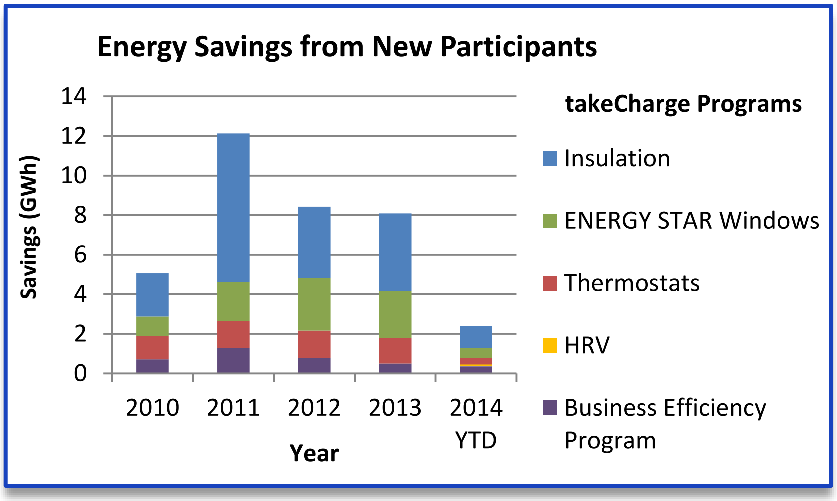
Materials Management

During the quarter, Materials Management completed a radio-frequency identification ("RFID") pilot project. RFID technology allows improved inventory tracking and corporate reporting. The full implementation of this technology is planned to be included in the Company's 2015 capital budget application. Also during the quarter, a new requisitioning system was fully implemented. All approvals are now electronic, and vendors are fully connected through a web portal.

Energy Conservation

	YTD			Annual
	Actual 2014	Plan 2014	Actual 2013	Plan 2014
Energy Saved (GWh)	2.6	2.3	2.1	12.0

Customer energy savings of approximately 2.6 GWh were achieved in the 1st quarter, which is slightly higher than plan. Over 1,450 customers participated in Newfoundland Power's takeCHARGE rebate programs.



Customer Outreach

The takeCHARGE team provided customers with energy efficiency advice during a number of events, including the 31st Annual Canadian Home Builders Association Home Show, Hospitality Newfoundland and Labrador Conference and Trade Show, the Board of Trade Business Development Summit and Canadian Home Builders Association Housing Forum.

Chris House and Jennie Wadden greet commercial customers at the takeCHARGE Business Efficiency Program launch at the Geo Center, St. John's.

Energy Conservation Programs

On February 27th, the takeCHARGE team held a public launch event for the Business Efficiency Program at the Geo Center in St. John's. This event brought together commercial customers and trade allies to inform them about this new program that features incentives and custom solutions for businesses of all sizes.

A new "Instant Rebate" program is being developed and will launch in June 2014. It will provide at-the-cash rebates through participating retailers for everyday items such as CFL and LED lighting.

System Performance

Reliability

	YTD			Annual
	Actual 2014	Plan 2014	Actual 2013	Plan 2014
Outage hours per customer (SAIDI) [1,2]	0.79	0.79	0.56	2.41
Outages per customer (SAIFI) [1,3]	0.68	0.49	0.39	1.71

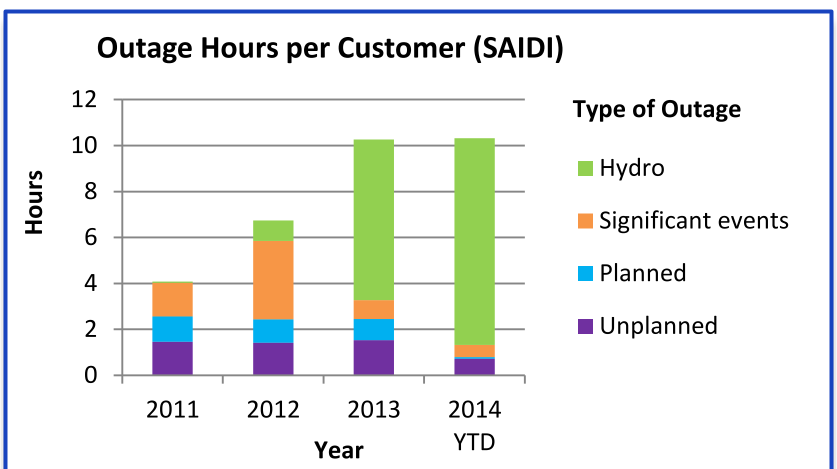
[1] System performance statistics exclude interruptions which are Hydro related and those which meet the Canadian Electricity Association definition of significant events.
[2] Excludes 0.53 for January blizzard and 9.00 for loss of Hydro supply.
[3] Excludes 0.09 for January blizzard and 4.29 for loss of Hydro supply.

Loss of supply from Hydro resulted in power outages for the majority of customers. On average, customers experienced 12 hours of outage during the period January 2nd-8th, 2014.

In the 1st quarter, outage hours per customer were consistent with plan, excluding loss of supply. Over the period January 2nd–8th, a blizzard coupled with electricity supply issues and equipment failure on Hydro's electrical system caused extended outages to approximately 190,000 customers across the Island. Hydro experienced substation, transmission and generation problems that accounted for approximately 95% of the customer outage hours related to this event.

Other significant unplanned power interruptions in the 1st quarter included the following:

- On Jan 23rd, fallen trees due to high winds caused an outage to 1,299 customers in the New Wes Valley area. Customers were affected for up to 5 hours.



- On Jan 26th, a broken conductor caused an outage to 1,614 customers in Grand Falls-Windsor for over 2 hours.

- On Jan 26th, a broken insulator caused an outage to 1,931 in the Village Mall area of St. John's for up to 3 ¼ hours.

- On Feb 14th, a substation power transformer gas detection sensor tripped, causing an outage to 11,047 customers in the Corner Brook, Southern Shore, Bay of Islands area for over an hour.

- On Feb 17th, high winds caused an outage to 2,034 customers in the Kelligrews area for up to 3 ¾ hours.

- On Feb 19th, salt spray caused an outage to 3,681 customers in the Portugal Cove St. Phillips Bell Island area for 101 minutes.

Electricity Supply

	1st Quarter			Annual
	Actual 2014	Plan 2014	Actual 2013	Plan 2014
Energy Purchased (GWh) [1]	2,011.4	1,975.1	1,950.5	5,740.2
Peak Demand (MW) [1, 2]	1,343.3	1,347.8	1,350.5	1,347.8
Hydro Plant Production (GWh)	126.7	119.1	134.3	430.4
Plant Availability (%)	93.6	95.0	97.2	95.0

1 Weather adjusted.
2 Peak demand for the 2013/2014 winter period occurred on March 5th, 2014 at 7:15 a.m.

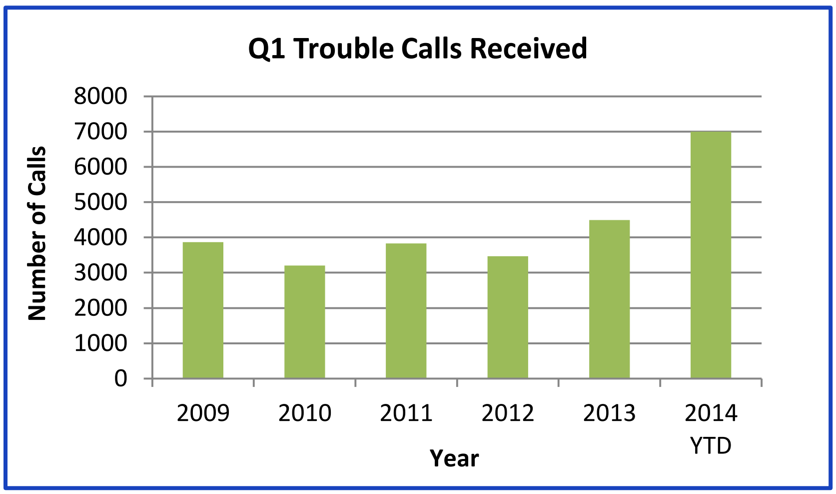
Energy purchased was 36.3 GWh higher than plan and 60.9 GWh higher than 1st quarter results in 2013. This increase reflects higher than expected electricity sales.

In the 1st quarter, hydro plant production was 7.6 GWh higher than plan and 7.6 GWh lower than 2013. Although water inflows were lower than the same period in 2013, production was maximized as the result of more frequent Hydro requests for additional generation from the Company's plants due to supply issues. In the 1st quarter, hydro plant availability was 93.6% which is below plan and lower than the 1st quarter of 2013. With the more frequent requests for generation from Hydro, there was an increase in the number of trips caused by ice blockage of hydro plant water intakes.

Operations

	YTD			Annual
	Actual 2014	Plan 2014	Actual 2013	Plan 2014
Customer Appointments Met (%)	76	90	-[1]	90
New Service Response (%) [2]	77	90	75	90
Trouble Call Response (%) [3]	80	85	82	85
Street Light Call Response (%) [4]	61	85	88	85
Meter Route Reductions	9	8	5	53

[1] Scheduled appointments for service hook-ups were not yet in place in the 1st quarter of 2013.
[2] % of new service connections within 10 days.
[3] % of trouble call response within 2 hours.
[4] % of street light call response within 5 days.



The Company's field service performance in the 1st quarter was negatively impacted by the loss of supply and system disruptions in January, which delayed other customer service work. Persistent poor winter weather conditions also resulted in an unusually high volume of trouble calls throughout the quarter. The Company received almost 7,000 trouble calls in the 1st quarter 2014, which is over 50% more than the highest number received during any 1st quarter in the previous 10 years. This primarily reflects the impact of high winds, including 14 days in the 1st quarter of 2014 in which wind gusts exceeded 100 km/hour. This occurred on fewer than three days in the 1st quarters of each of the previous five years. The significant snow accumulations this winter also hampered service, causing traffic control and equipment accessibility issues.

Distribution Work Dispatch

In the 1st quarter, the Company completed the rollout of centralized dispatch for service work in the three remaining operating areas. Work schedules for service work in all operating areas are now dispatched from a central location and completed by crews using laptops in trucks.

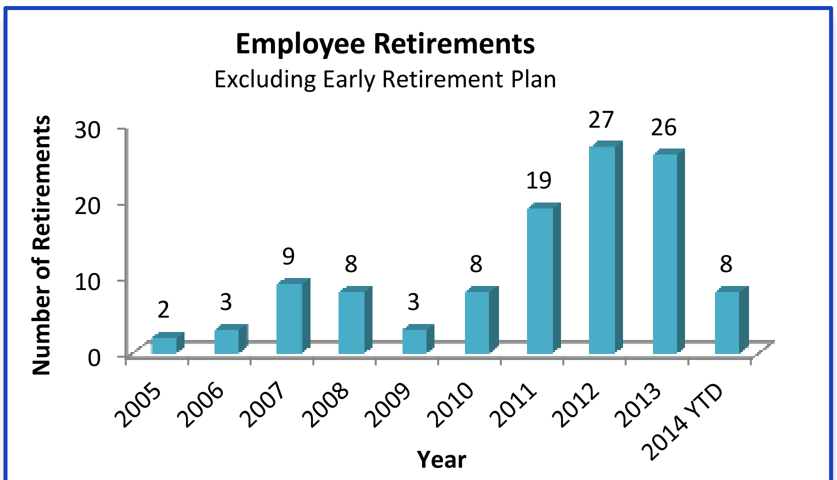
More than 8,000 service work jobs were dispatched and completed electronically by crews in the first quarter.

This includes new service connections, streetlight repairs and trouble call response. Booking for new service installation appointments is also operational in all areas.

Automated Meter Reading (AMR)

The Company installed an additional 4,399 Automated Meter Reading (AMR) meters in the 1st quarter, which is consistent with plan. Typically, there are fewer installations during the winter due to inaccessibility caused by weather. Optimization of meter reading routes has resulted in a reduction of nine routes in the 1st quarter. Meter reading costs are broadly consistent with plan and reflect a $34,000 reduction from 2013 costs. All Meter Readers were advised of Company plans to reduce its meter reading workforce by 2.9 FTEs or approximately 10% this year.

Workforce Management



The number of employee retirements is expected to peak in 2014, with eight occurring in the 1st quarter. 2014 retirements largely reflect the end of career for many employees who were hired in the 1970s during a time of significant electrical system expansion and development in the province.

In anticipation of these retirements and in response to its changing workforce, the Company carried out activities in the 1st quarter to address succession planning, facilitate knowledge transfer, enhance the work environment and maximize employee retention. In February, approximately 40 directors, superintendents and supervisors attended sessions on employee recognition and early and safe return to work. In order to enhance the effectiveness of the Company's technical training, 20 internal technical trainers attended a three day facilitation and presentation skills program at the College of the North Atlantic. A new *Line Supervisor's Responsibilities and Best Practices Guide* was made available to all Line Supervisors in February 2014.

Capital Program

	YTD			Annual
	Actual 2014	Plan 2014	Actual 2013	Plan [1] 2014
Capital Expenditures ($000s)	17,387	15,071	13,467	98,232

[1] Annual Plan includes PUB approved budget of $83.7 million and $14.5 million for the replacement of the Bell Island submarine cables. Excludes the $750,000 allowance for unforeseen items.

Year to date, capital expenditures were ahead of plan primarily due to the early approval of the 2014 Capital Budget Application and expenditures on projects carried over from 2013. This was partially offset by delays in some construction projects due to winter conditions.

Activity in the 1st quarter largely involved completion of engineering design and procurement required in advance of the 2nd and 3rd quarter construction season. All 2014 projects are on budget and on schedule.

Snow accumulations impacted capital projects during the 1st quarter.

The Company received Board approval in December 2013 to replace the Bell Island submarine cables at an estimated cost of $14,520,000. In January, the Company entered into a turn-key contract with Hellenic Cables S.S. of Corinth, Greece for the design, supply and installation of two 25kV 3-phase XLPE submarine power cables. Cable installation is scheduled for September.

Four 2013 projects were carried over into 2014. Renovations to the Carbonear service building were extended into 2014 when unforeseen issues with mould and asbestos arose during construction. The 2013 project to replace the VHF radio system was delayed as the result of technical issues associated with providing a console for the Company's System Control Centre operators. The delivery of the new portable substation has been delayed until the 2nd quarter, 2014. The purchase and installation of the replacement UPS for the Duffy Place facility was delayed, and subsequently re-tendered, when vendor bids exceeded the approved budget.

Additional 2014 Capital Expenditures

On April 4th, 2014, the Company filed an application for approval of supplemental 2014 capital expenditures of $2.9 million, required to improve electrical system performance following the events of January 2nd-8th, 2014. The application was approved by the Board on April 28th, 2014.

Environment

	YTD			Annual
	Actual 2014	Plan 2014	Actual 2013	Plan 2014
Number of Spills [1]	12	18	12	73
Reportable PCB Spills [2]	0	0	0	0

[1] Excludes all third party spills and spills due to significant events. Year to date in 2014 there have been no spills caused by third parties; year to date in 2013 there was one third party spill. Year to date in 2014 significant events caused no spills; year to date in 2013 significant events caused three spills.

[2] The Company plans for 0 reportable PCB spills.

Environment Performance

There were 12 spills in the 1st quarter.

For the 1st quarter of 2014, the number of spills was lower than plan and equal to the same period in 2013. Of the 12 spills this year, six have been related to Company and contractor vehicle fluid spills (such as hydraulic and transmission fluid) and six have been mineral oil spills related to electrical equipment. There were no reportable PCB spills in the 1st quarter.

On April 1st, vandalism caused a spill of 8,000 litres of mineral oil from a power transformer at Pulpit Rock substation in Torbay. Gunshots punctured the cooling radiators allowing the 35 degree Celsius oil to leak on the ground. Company staff, along with environmental contractor Stantec, initiated emergency response to contain the spill. Remediation work is expected to continue through the 2nd quarter.

Environment Initiatives

The annual internal review of the Environmental Management System was completed in February and its effectiveness was re-affirmed. Environmental training was provided in the 1st quarter to 117 employees and 39 contractor employees.

The current Newfoundland Power Environmental Policy has been unchanged for five years. During the 1st quarter, a review of the policy was undertaken and minor changes were initiated.

Community Investment

On February 27th, the Company was recognized by the Prime Minister of Canada as a Business Leader in Volunteerism and Community Leadership for the Atlantic Region.

The Prime Minister's Volunteer Award is presented to a forward thinking business that demonstrates leadership in social responsibility, supports the well-being of their communities, and encourages their employees to contribute to social goals.

The Power of Life Project/Cancer Care

A number of fundraising activities were held throughout the quarter. Corner Brook employees held their 4th Annual Snowmobile Run raising over $4,000 in support of the *The Power of Life Project* and the Stephan Hopkins Foundation. Clarenville employees donated an Automatic Blood Pressure Monitor and an additional $12,000 to the Chemotherapy Room at Dr. G. B. Cross Memorial Hospital. Team POWERful raised $14,650 from its participation in Bust a Move, a fundraiser aimed at supporting breast health in the province, placing it in the top five fundraising teams. Over $300,000 was raised at this event. St. John's area employees hosted their 3rd Annual Kitchen Party, which featured the musical talent of employees and a silent auction, raising nearly $9,000.

Newfoundland and Labrador 2014 Winter Games

The Company was a major sponsor of the Newfoundland and Labrador 2014 Winter Games held in Clarenville, March 1st–8th. The "Power Connector" vehicle provided transportation for the athletes throughout the Games; the Newfoundland Power logo was prominently displayed on identification worn by the athletes and volunteers; and the Games were promoted to customers in January's electricity bills.

Community Leadership

Paul Walsh, a Senior Business Analyst with Operations, was appointed as Chair of the Provincial Advisory Council for the Inclusion of Persons with Disabilities by Kevin O'Brien, Minister of Advanced Education and Skills and Minister responsible for the Status of Persons with Disabilities. Retiree Bruce Oldford also was appointed to the Provincial Advisory Council.