

Retail Customer Survey: What Drives Customer Satisfaction?

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Introductions

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Strategic Priorities

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PUBLIC POWER'S

VISION

To be and be recognized as the leader in providing superior service and innovative energy solutions to communities and customers in our region.

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PUBLIC POWER'S
PURPOSE

Our purpose is to deliver value to our communities and customers through collective strength, knowledge, and action while promoting a successful future.

PUBLIC POWER'S
STRATEGIC PRIORITIES

FUTURE-FOCUSED

Develop a future-focused mindset



STRENGTHEN PUBLIC POWER

Build public and political support for public power

PROVIDE SUPERIOR POWER

Deliver reliable, affordable, and sustainable electric power

CUSTOMER-CENTERED INNOVATION

Innovate and invest to better serve our customers and communities

PEOPLE

Leverage our people as our greatest asset



The Role of the Retail Customer Survey

- A tool to gather customer input to prioritize program offerings and investments
- Identifies opportunities for improvement
- Identifies areas to investigate and further engage with customers for interactive (qualitative) feedback
- A quantitative measure of success in achieving the Public Power Vision

Retail Customer Survey in Action

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Retail Customer Survey

OVERVIEW

- Done annually with assistance of an outside vendor
- Members should participate every 3 years
- Benchmarks for Public Power, Co-ops, and IOUs tracked each year



Retail Customer Survey

GOALS

- Identify customer satisfaction and benchmarking scores
- Deeper understanding of customer preferences for programs, services, and communication
- Identify & update customer segmentation and trends for emerging topics like renewable energy



Methodology: Sample Groups



Public Power

*residential customers living in public power communities
across North Carolina*

n = 503



Competitors

*residential customers living in qualifying areas in North
Carolina with a competitor power provider*

n = 553

** from the Maru Voice Panel in the U.S.*

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Key Findings

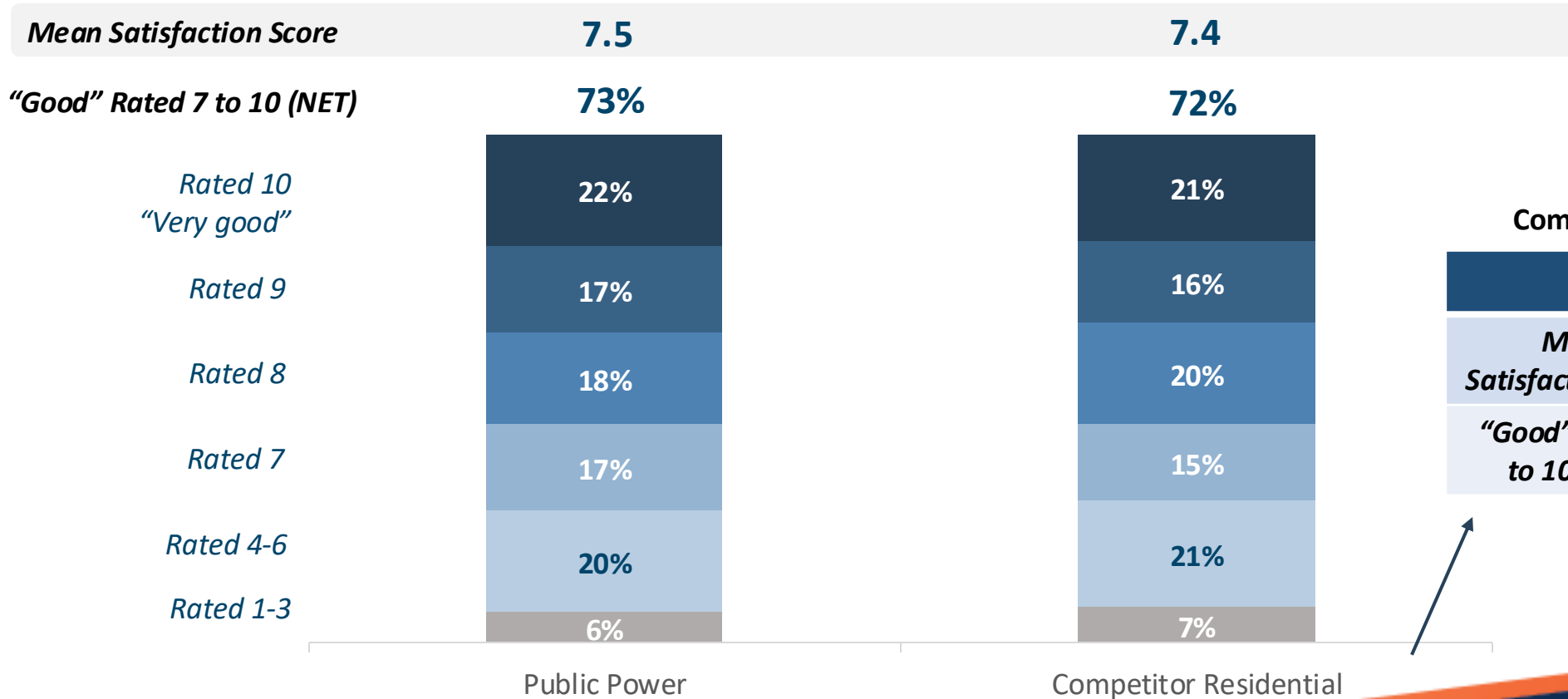
There are opportunities to improve overall satisfaction, research findings can help prioritize.

- “Providing services and products I expect” is now a key driver to customer satisfaction.
- Roadmap programs and customer technologies based on customer input. Prioritizing valuable programs to help drive satisfaction.
- Maximize the value of existing programs and successes. Ensure programs are easy to utilize and customers understand them. Communicate value and reliability often.



Customer Satisfaction Benchmarks

Q. How would you rate your overall satisfaction with your utility?

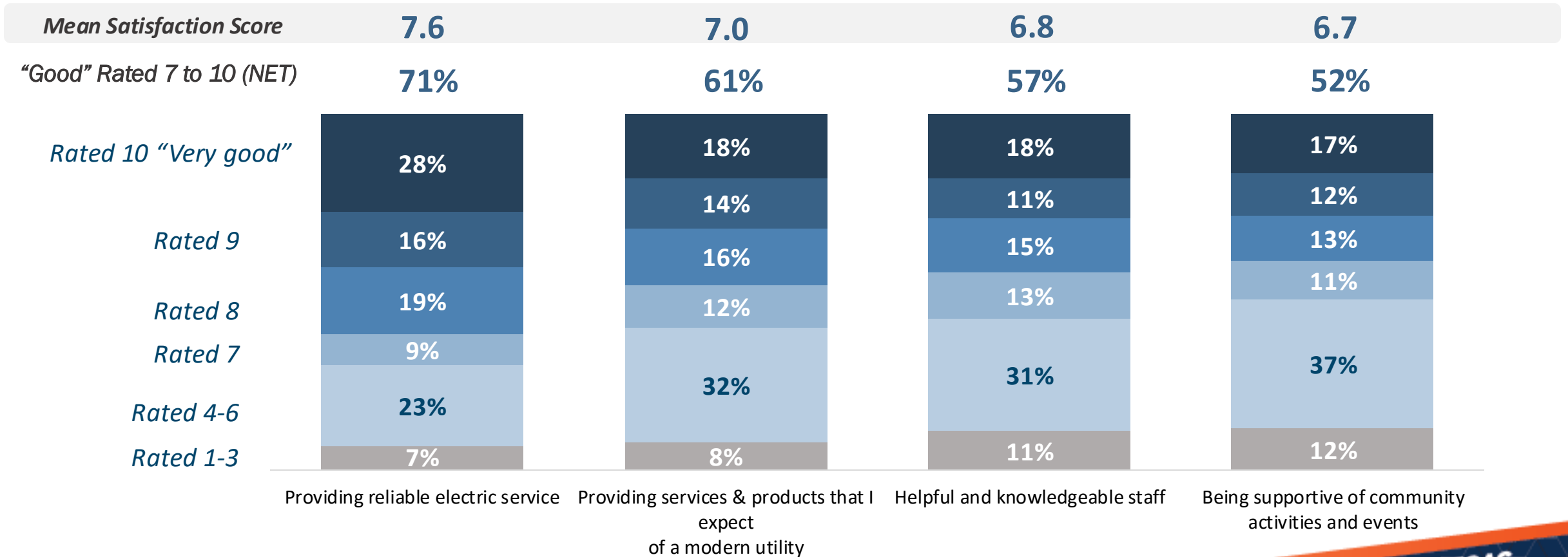


Competitor Residential Type

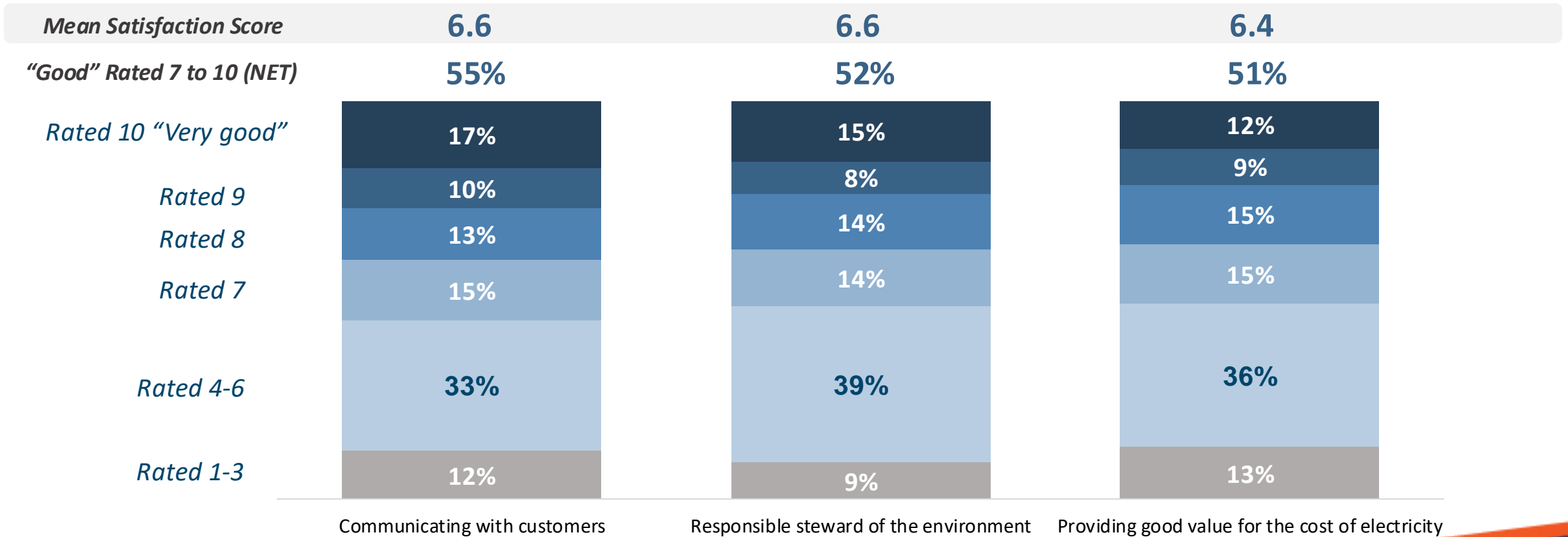
	Co-op	IOU
Mean Satisfaction Score	7.3	7.8
"Good" Rated 7 to 10 (NET)	70%	80%



Utility Organizational Characteristics



Utility Organizational Characteristics



Key Driver Analysis

What is a key driver?



Key Driver Analysis

Customers were presented with seven statements about their utility and were asked their level of association for each statement with their utility and their overall satisfaction.

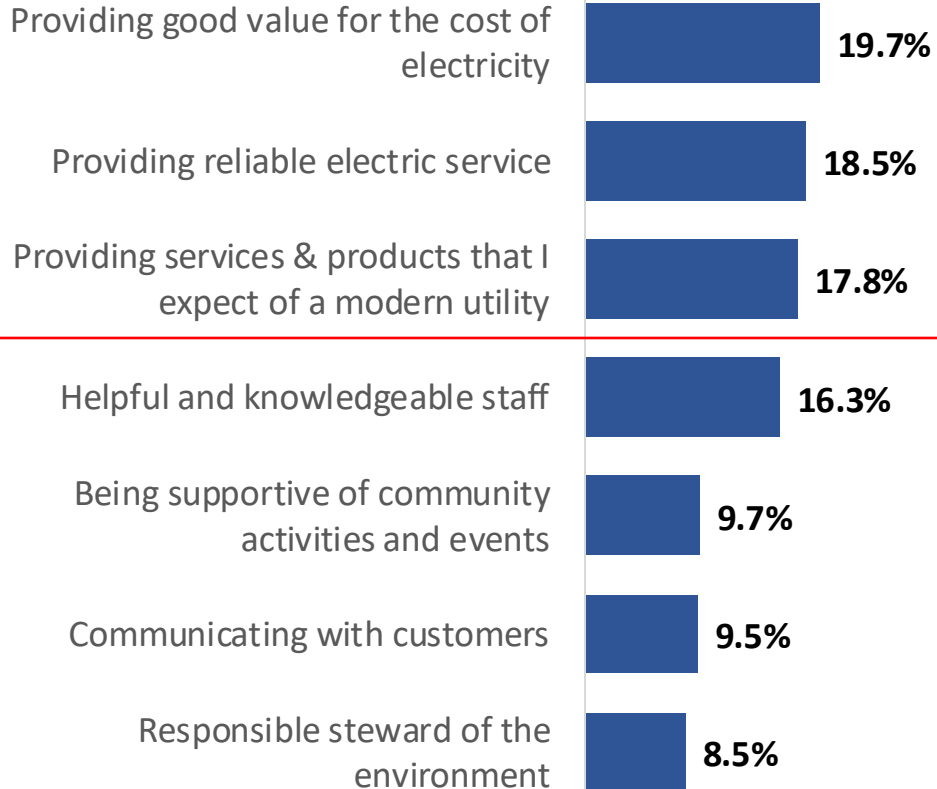
Attributes Tested:

- ❖ Providing reliable electric service
- ❖ Providing good value for the cost of electricity
- ❖ Providing services & products that I expect of a modern utility
- ❖ Communicating with customers
- ❖ Helpful and knowledgeable staff
- ❖ Responsible steward of the environment
- ❖ Being supportive of community activities and events

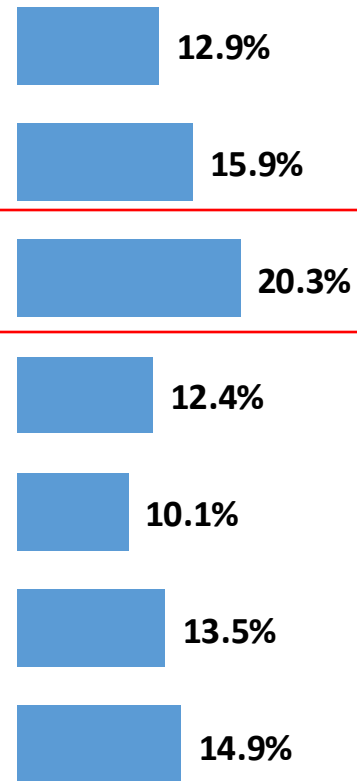


Key Driver Analysis

Public Power



Competitor Residential



“Providing services & products that I expect” grew in importance by +5 points, making it a new key driver for Public Power 2024 customers.

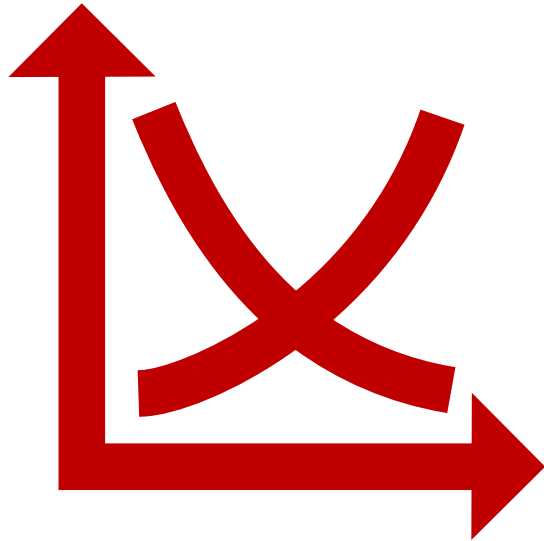
Attributes in the red box are the primary drivers for each group.

Primary Drivers

What is a primary key driver?



Primary Drivers

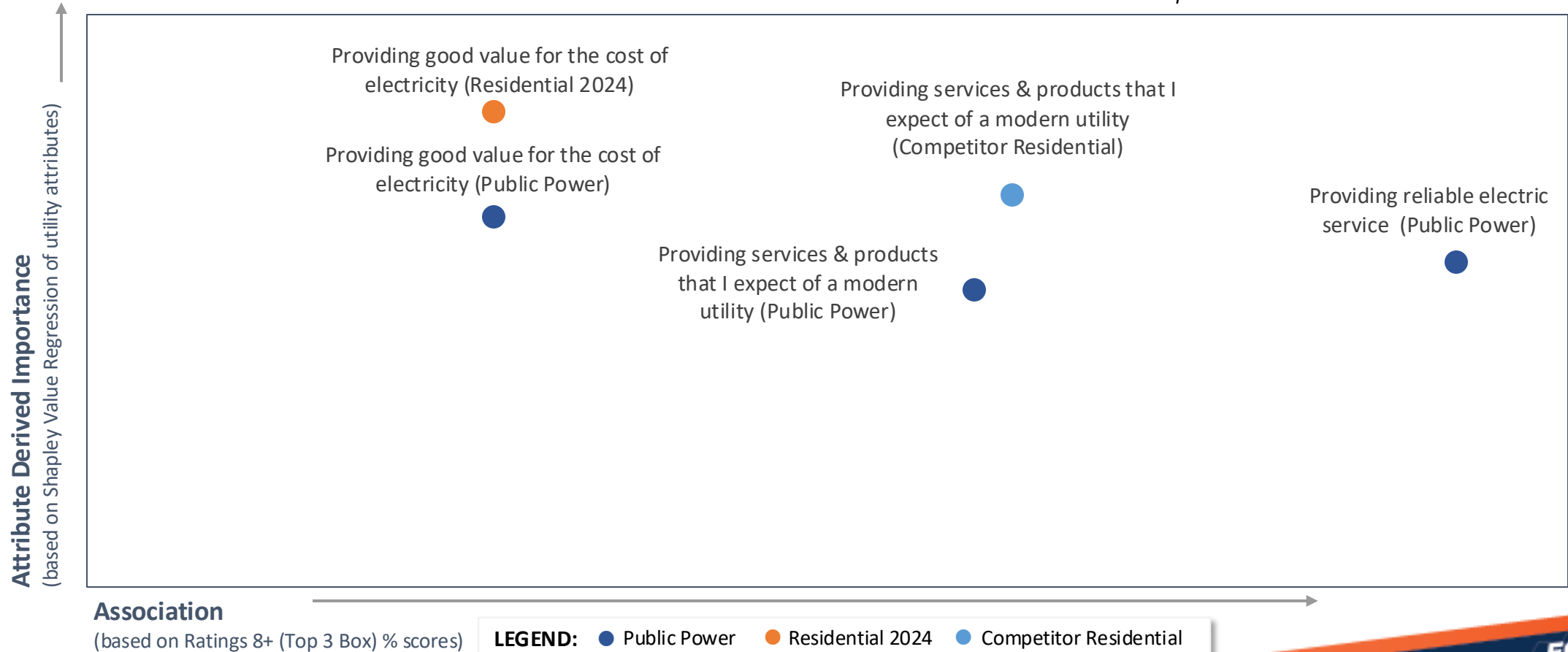


Once we understand what is driving customer satisfaction based on the previous seven statements; the relative importance is then derived to determine which attributes are the primary drivers of satisfaction.



Primary Key Drivers

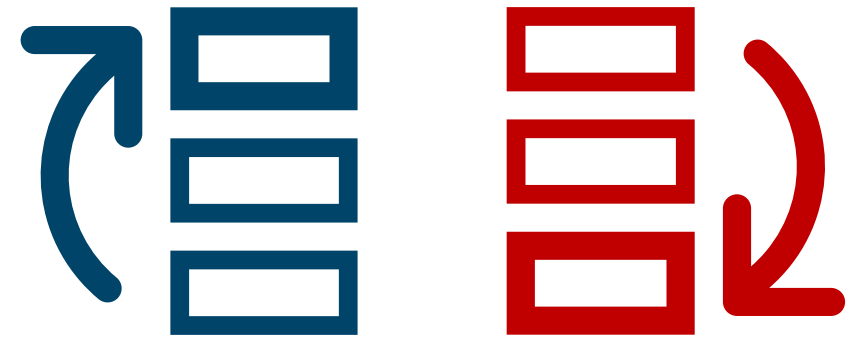
Satisfaction & Primary Driver Analysis* *Relative Importance vs. Attribute Association*



Thurston Analysis

This is another way to understand what's most important to customers

By forcing customers to rank the characteristics in order of importance to them, you gain an understanding of their priorities.



Thurstone Analysis

Public Power

- ◆ Providing reliable electric service
- ◆ Providing good value for the cost of electricity
- ◆ Providing services and products that I expect of a modern utility
- ◆ Communicating with customers
- ◆ Helpful and knowledgeable staff
- ◆ Responsible steward of the environment
- ◆ Being supportive of community activities and events

Competitor Residential

- ◆ Providing reliable electric service
- ◆ Providing good value for the cost of electricity
- ◆ Communicating with customers
- ◆ Providing services and products that I expect of a modern utility
- ◆ Helpful and knowledgeable staff
- ◆ Responsible steward of the environment
- ◆ Being supportive of community activities and events

Thurston Analysis

Providing reliable electric service was the most important characteristics across all sample groups when customers were **forced to rank** characteristics based on importance.

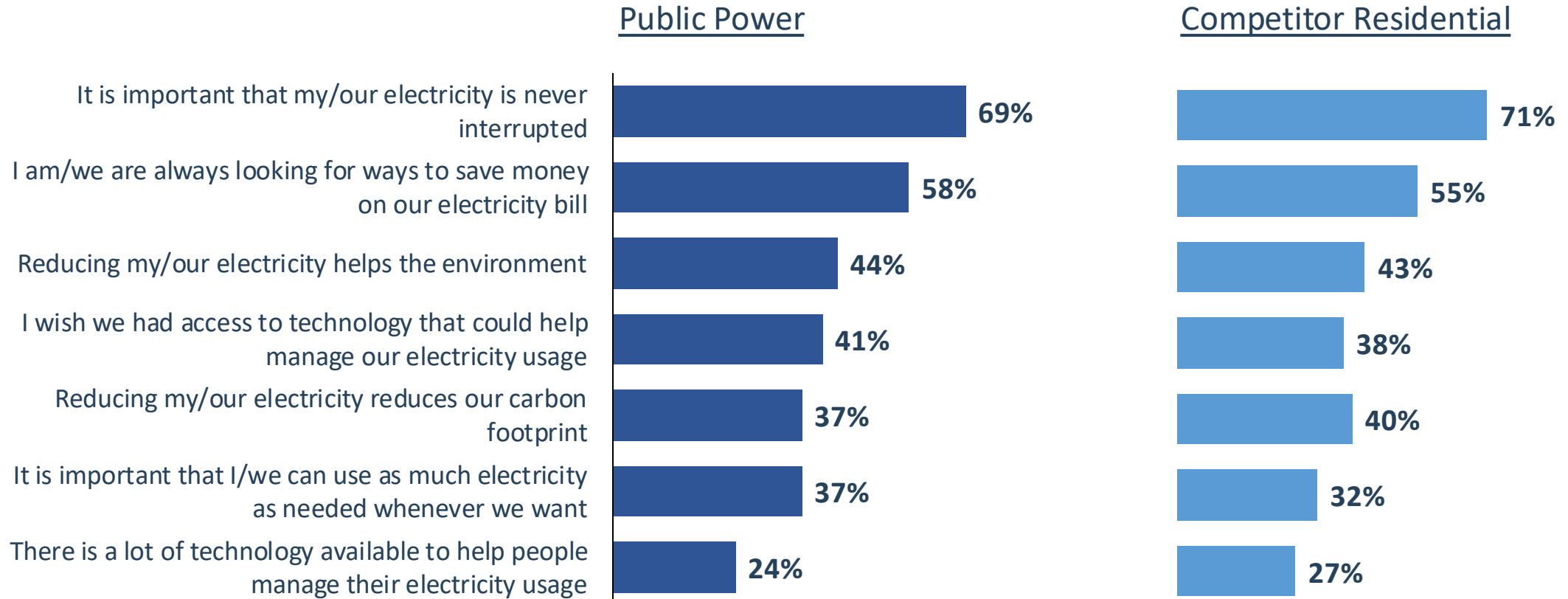
However, other characteristics (especially service & product expectations) are closer in importance to reliability for Public Power 2024 customers than in 2023.

Programs & Services

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Electricity Usage



ElectriCities Tools & Resources

Value of Public Power Resources

Public power has an impressive story to tell. Use the resources below to educate your stakeholders, advocate for public power, and amplify your messages about the benefits of being a public power community.



RADIO RESOURCES

Click for information about our radio resources.



VIDEO ASSETS

Click for information about our video assets.



DIGITAL ADVERTISING SAMPLES

Click for digital advertising examples.



PHOTO ASSETS

Click here to view and download photography for use.



SOCIAL MEDIA CONTENT

Click to view and download our monthly social media toolkits.



SPECIALTY TOOLKITS

Click for information about our specialty toolkits.



ELECTRICITIES COMMS. PROGRAMS

Click to learn more about Comms. programs offered by ElectriCities.



ADDITIONAL RESOURCES

Click here for additional resources for promoting public power.



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ElectriCities Tools & Resources

ElectriCities has resources including sample posts and language members can use across platforms throughout the year.



Our members are **#PublicPower**, community-owned utilities. That means they are accountable to their citizens, not investors or shareholders. Their employees, from the **#lineworkers** to customer service reps, are all ...more



ElectriCities of NC @ElectriCitiesNC · 3h
#NCPublicPower customers experience 41.5% fewer outages than other power providers' customers, but when it does happen, make sure you're prepared! ⚡
Visit the link below to see more @Ready recommended items for a basic disaster supplies kit.
ready.gov/kit
#HurricanePrep



electricitiesnc · Follow

electricitiesnc Our #lineworkers are real-life superheroes. ⚡
#PublicPower mutual aid saves the day again!
Many residents in our member communities lost power due to the recent severe thunderstorms, but our crews were on it faster than lightning.
Crews from #GraniteFallsNC assisted in @CityofMorganton, crews from @TownofMaiden and @Discover_FC assisted in @CityofNewton, and crews from @Monroe.NC assisted in #LandisNC.
After our ElectriCities members were taken care of, crews from @GreenvilleUtilities/@GreenvilleNC, #WilsonEnergy (@CityOfWilson), and #HighPointNC (@CityOfHighPoint) headed over to @KnoxvilleCity to help @KnoxvilleUtilitiesBoard crews after an EF2 tornado hit their area and caused substantial damage.
Let's give it up for brave, dedicated lineworkers who rise to the occasion every time we need them!
(Photo Credit: City of Newton, NC, City of Wilson, NC/Wilson Energy, and Knoxville Utilities Board)

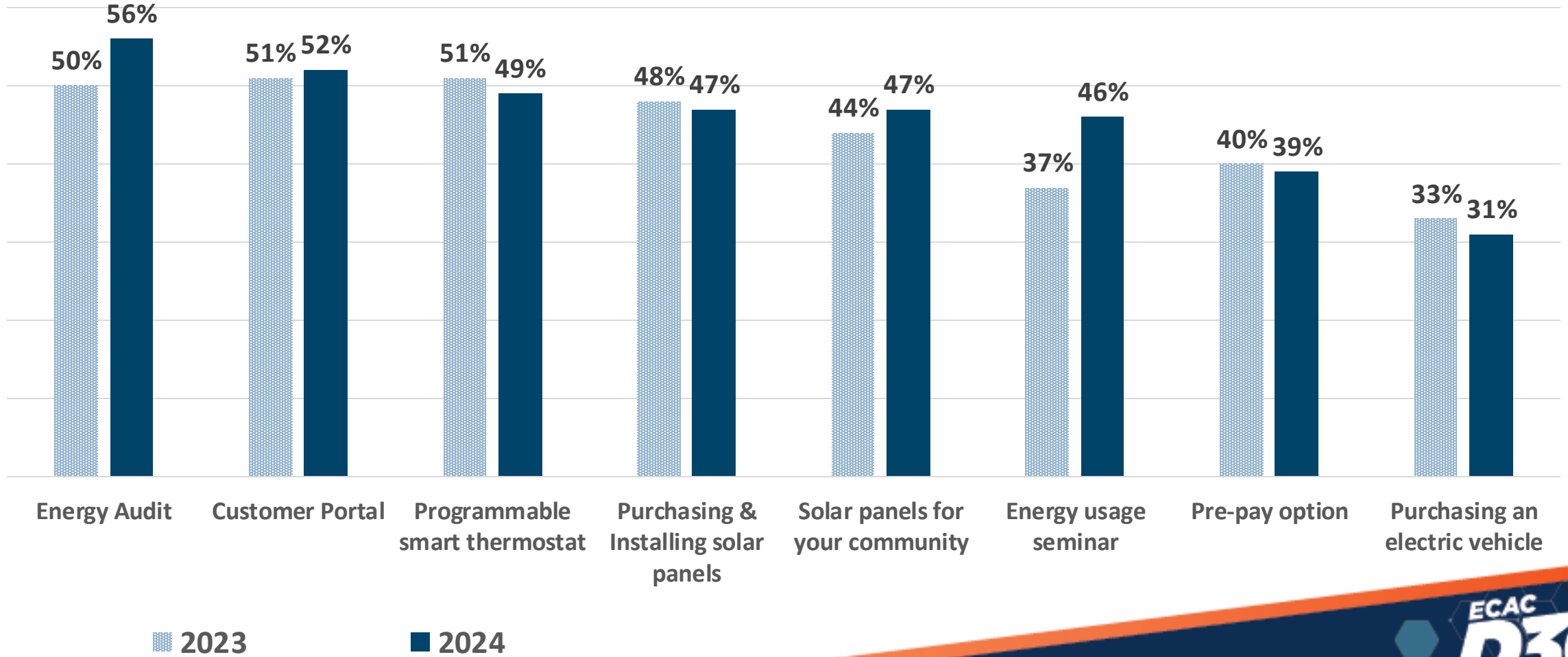
#LineLife #ThankALineworker #NCPublicPower #MorgantonNC #MaidenNC #ForestCityNC #NewtonNC #MonroeNC #LandisNC #GreenvilleNC #GUC #GreenvilleUtilities #WilsonNC #HighPointNC #KnoxvilleTN #KUB #KnoxvilleUtilitiesBoard

50w

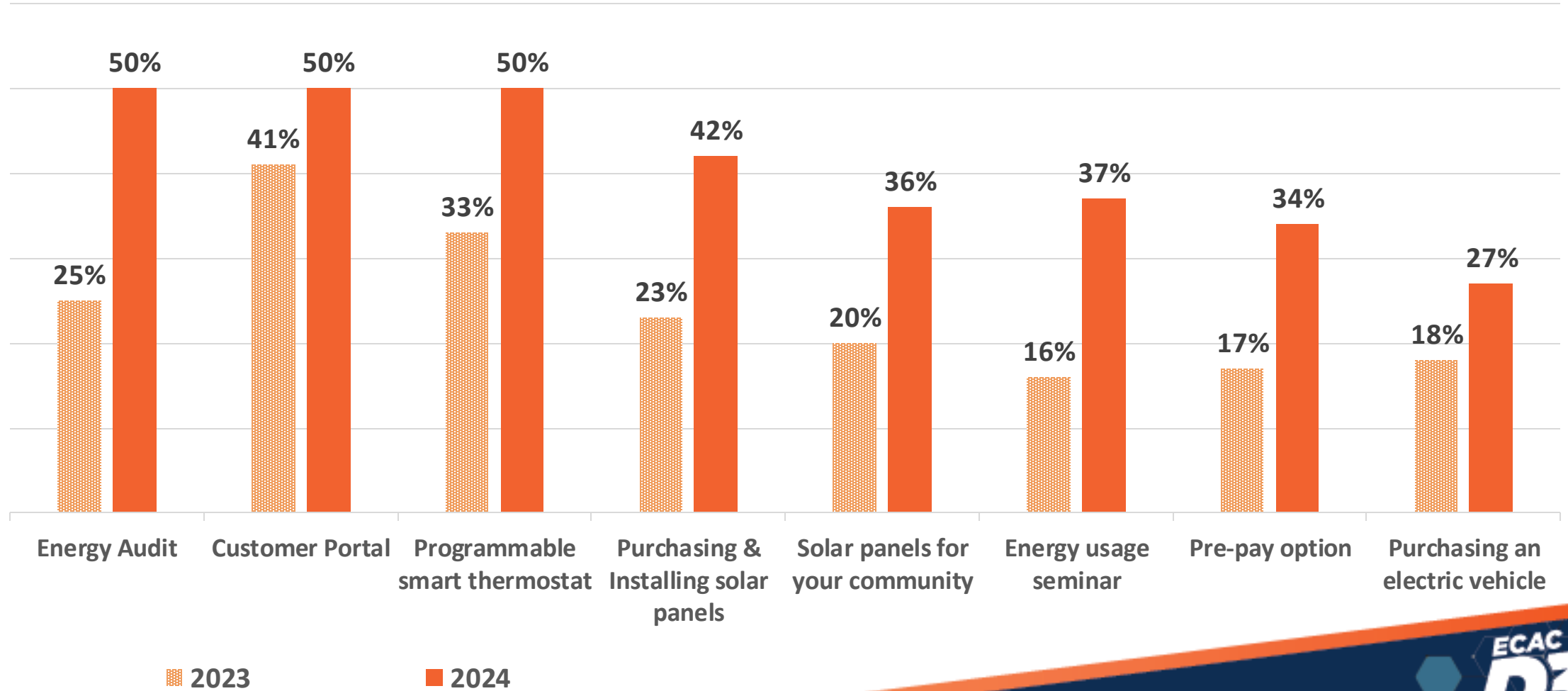
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2024 Public Power Program Interest



2024 Competitor Program Interest



Sample Member Services & Programs

Aquanta Peak Savings Program for Electric Water Heaters	Smart Thermostat (BYOT)	
		
HVAC	LED Lighting	Home Energy Audit
		
Ductwork	Insulation Replacement	Entek for Electric Water Heaters
		
Community Solar	Holiday LED Light (Seasonal)	Rain Sensor (Seasonal)
		

- Electric
- Area Served
- Beat The Peak
- Community Pole Banner Standards
- Electric Charging Stations
- Outdoor Lighting and Street Lights
- Pole Attachment Standard
- Priority Customers
- Rates & Regulations
- Renewables & Customer Generation
- Smart Thermostat Pilot Program**
- Stay Safe: Electric
- Tree Trimming

Smart Thermostat Pilot Program

Save energy, stay comfortable, and help keep energy affordable for our hometown.

GUC has partnered with ecobee to help reward our customers for using less energy when everyone else is using more. If you have an ecobee thermostat, sign up for the Smart Thermostat Pilot Program using eco+ to automatically adjust the temperature during peak demand periods, while keeping you in control. As a thank-you and added bonus, the Smart Thermostat Pilot Program will reward you with a one-time \$50 enrollment incentive, in the form of a bill credit, as well as monthly \$5 bill credit for each thermostat enrolled in the program.

Signing up is easy!

- **Set up eco+**
 - Open your ecobee mobile app to set up eco+ for your home or business. If you don't see an eco+ invitation, select eco+ from the main menu on your home screen, and enable it.
- **Choose Greenville Utilities**
 - Go to the eco+ menu and enable the **Community Energy Savings** feature.
 - Identify yourself as a Greenville Utilities customer and follow the prompts in the ecobee app to finish enrolling in the Peakin
- **Enroll**
 - An offer from GUC will appear on the screen, including the incentive and Program Terms and Conditions. Select "Ok" to enroll.

Eligibility guidelines:

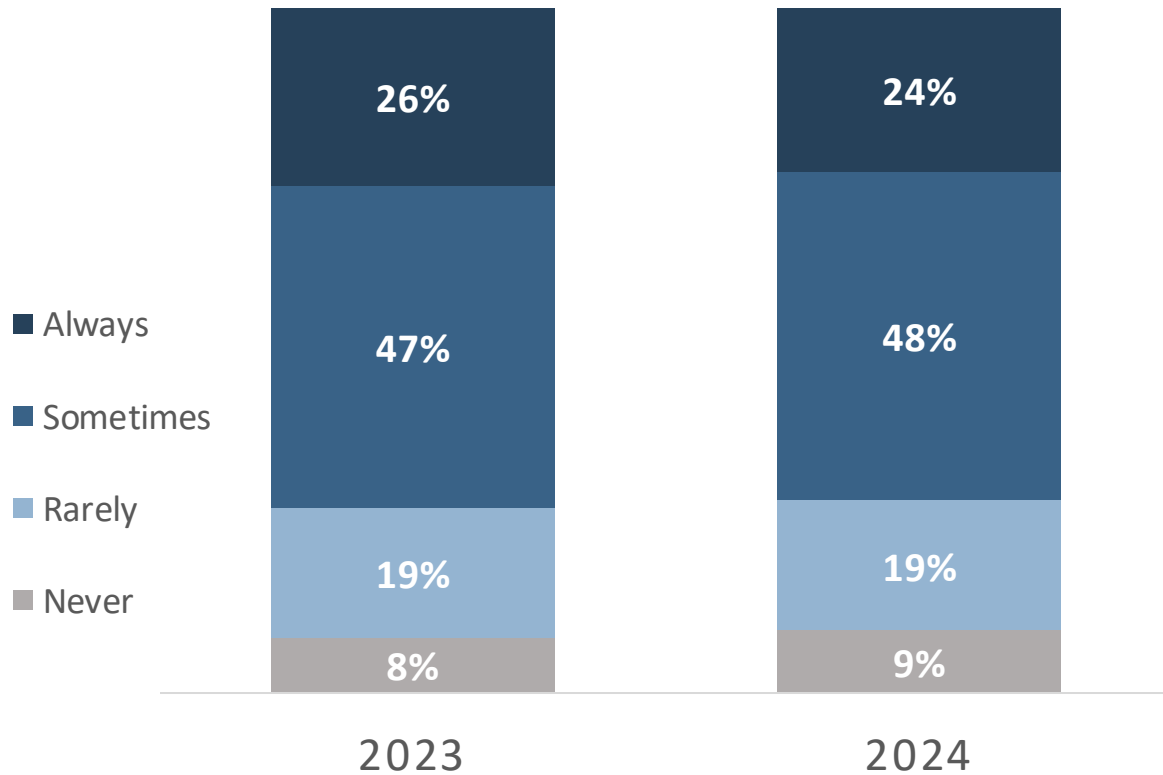
- Customer must be a GUC residential customer.
- Customer must be the account holder of record where thermostat(s) is installed.
- The Customer agrees to maintain an active account with GUC throughout the duration of the Program.
- Customer must not currently be enrolled in GUC's "Beat the Peak" residential load management program with their central air conditioning or electric furnace being controlled.
- The Customer certifies that they have a compatible air-conditioner, heat pump or electric furnace in good working order.
- The Customer agrees to maintain the connection between their enrolled thermostat(s) through an Internet Service Provider for the duration of the Program.
- The Customer agrees to assist support personnel in resolving connectivity or other issues relevant to the Program.
- The Program is a load management program and the Customer agrees to participate in monthly control events of their air-conditioning.

Greenville Utilities

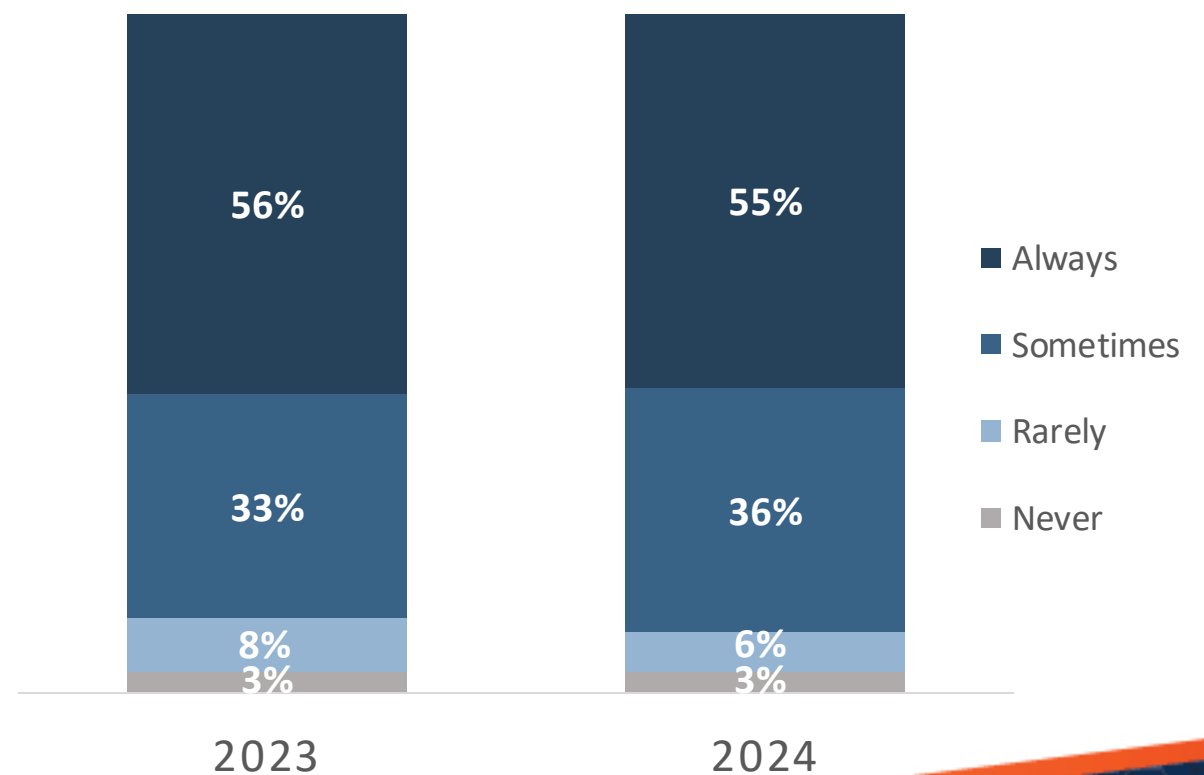


What Drives Energy Efficiency

Environmental benefits (72%) are top of mind



The money that can be saved (91%) is top of mind



ElectriCities Energy Efficiency & Education Programs

Helping our communities serve their residents.

We provide a number of services to the residents in our member communities. From energy education to energy-saving programs, our goal is to deliver the knowledge and resources to help people lower their home energy bills.



Energy Audits

Our energy auditors visit homes in our member communities and provide guidance on ways to cut energy costs.

Energy Savings

Load management, energy audits, and rebate programs help you improve efficiency and reduce costs.

Energy Education

Our energy experts give advice on the best ways to save money on your home energy bill.

Energy Bill Forecast

Use this tool to see how the upcoming weather in your area could impact your energy bill.

TempTracker365™

Use this tool to see historical weather trends in your community.

Energy Saving Products

Purchase energy saving products like energy-efficient light bulbs, air filters, filter whistles, and more.

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Smart Energy Provider Program (SEP) Reflects Customer Feedback

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SEP overview

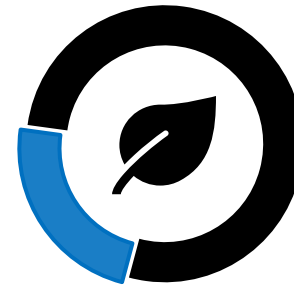
The SEP Application evaluates utility efforts in **four** areas:



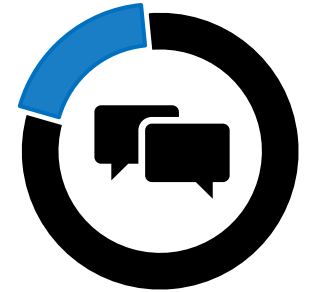
Smart Energy
Information (21%)



Energy Efficiency & Distributed
Energy Resources (37%)



Environmental & Sustainability
Programs and Initiatives (23%)



Communication,
Education & CX (19%)

SEP Designation

- Lasts for three years
- Reports on activities from previous three years
- A utility with a total score of **70 or higher** receives a designation
- Is a pass-or-fail system

SEP Requirements Validated by Retail Customer Survey

SEP Requirement	Research Supports
Time-varying Rate Plans	✓
Sustainability Programs (<i>i.e., RECs, paperless billing</i>)	✓
Demand-Side Energy Efficiency Programs (<i>i.e., online portals, energy audits and efficiency education</i>)	✓ ✓
E-Mobility Programs (<i>i.e., EV rebates, EV education / outreach, TOU rates</i>)	✓
Demand Response Programs (<i>i.e., customer-controlled customer equipment like water heaters</i>)	✓
Distributed Generation Programs (<i>i.e., residential / community-owned solar</i>)	✓

SEP Requirements Satisfied by Retail Customer Survey

SEP Requirement	Research Satisfies
Benchmarking	✓
Stakeholder Involvement	✓
Customer Satisfaction	✓



Next Steps

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Where to Start?

- Make sure you are collecting customer emails.
 - ❖ Email is consistently one of the top way customers like to receive communications from their utility
- Participate in survey so you can see what your customers think and need.
 - ❖ Is there a program or service they're looking for that isn't currently offered?
 - ❖ If you have recently participated, have you used the feedback to help prioritize what you should focus on (a new program, training staff, etc.)?
- How do you ensure your efforts pay off?

Takeaways

- ❖ Engage with customers proactively (*email, website, social, bill inserts, etc.*)
- ❖ Participate in a customer survey
- ❖ Evaluate your current program offerings & barriers to participation
- ❖ Roadmap programs for the future

Questions?

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