





# HOW COVID-19 IS IMPACTING THE UTILITY INDUSTRY

*WHAT DO CUSTOMERS WANT AND NEED DURING THIS TIME?*

greatblue  
WHAT'S NEXT.  
Michael Vigeant

APOGEE®  
Empowering Utilities for the Future

Elizabeth Burroughs  
Stephanie Knight





## **Michael J. Vigeant**, CEO, GreatBlue Research

With well over two decades of experience in market research, President and Founder Michael J. Vigeant champions the collaborative, client-focused atmosphere of GreatBlue Research. He launched The Center for Research in 2009 after serving as the Executive Vice President of The Center for Research and Public Policy, rebranding in 2013 to GreatBlue Research. Vigeant is a specialist in the design and implementation of a wide variety of quantitative and qualitative research methodologies including telephone, digital, journey mapping, mail, focus groups, and in-depth professional interviews. Michael has personally conducted over 500 focus groups across a diverse mix of industries. Vigeant is considered, nationally, to be one of the leading authorities on Utility research.



## **Elizabeth Burroughs**, Engagement Manager

Elizabeth graduated from Georgia State University in 2013 with a BBA in Marketing. Her professional background includes experience with strategic marketing campaigns. As Engagement Manager at Apogee Interactive, her role includes creating and executing outbound communication plans for Apogee's Envoy customers. Elizabeth specializes in digital communications strategies for utilities and is currently working with more than 20 utilities nationwide. She continues to help energy professionals meet and exceed their customer engagement goals with relevant, personalized, and proactive messaging regarding topics such as rate transformation, high bills, or utility program initiatives. Her proven campaign tactics include sophisticated digital applications that incorporate the utility customer's bill analysis with or without AMI data. Once the customer's data is analyzed the information is then selectively distributed to in the form of video, text, email, and where appropriate, utility social media.



## **Stephanie Knight**, Key Account Manager

Stephanie serves utilities from the Midwest to the Pacific Coast. With a diverse set of skills in management, communication, and leadership, she is able to provide the highest level of customer service, while building lasting relationships with her clients. Stephanie has a passion for developing and deploying strategic plans for customers to better communicate their brand, achieve their customer satisfaction goals, and educate the impact of energy-efficient behaviors. Stephanie is a graduate of the University of North Georgia with a BBA in Business Management.

# AGENDA



#1

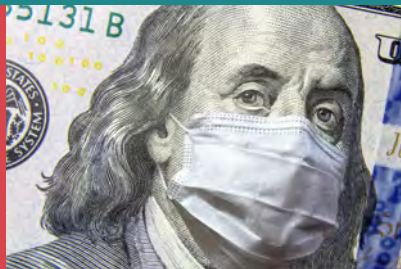
High Level Overview  
of Apogee  
and GreatBlue

★ ★ #2 ★ ★

Satisfaction with Utility  
Operations during COVID-19

#4

Communication  
Efforts



#3

Financial  
Impacts



#7

Customer  
Loyalty

#5

Energy Consumption  
Shifts



#6

Time-of-Use Rates





- ▶ Software as a Service (SaaS) provider focused on three major utility initiatives:



Customer  
Engagement



Customer  
Satisfaction



Program  
Participation

- ▶ Best in class Data Analytics
- ▶ Providing Consistency, Building Customer Trust



**Who We Are**  
Leading the market in  
customer engagement

In our **27<sup>th</sup>** year

Serving  
**HUNDREDS**  
of utilities, reaching  
**MILLIONS**  
of customers

# Harnessing the Power of Data to Help Clients Achieve Organizational Goals

**Data** to support strategic decisions to improve on products and services. Since 1979, our experience with study and instrument design, data collection, analysis, and formal presentation assists our clients in identifying the “why” and “what’s next.”

**Talent** with a knowledge base in a wide range of industries and methodologies ensures a 360° view of the challenges faced and the expertise to address them.

**Solutions** that are customized to provide a personalized approach of understanding organizational, employee, and customer needs allowing for more informed decisions.



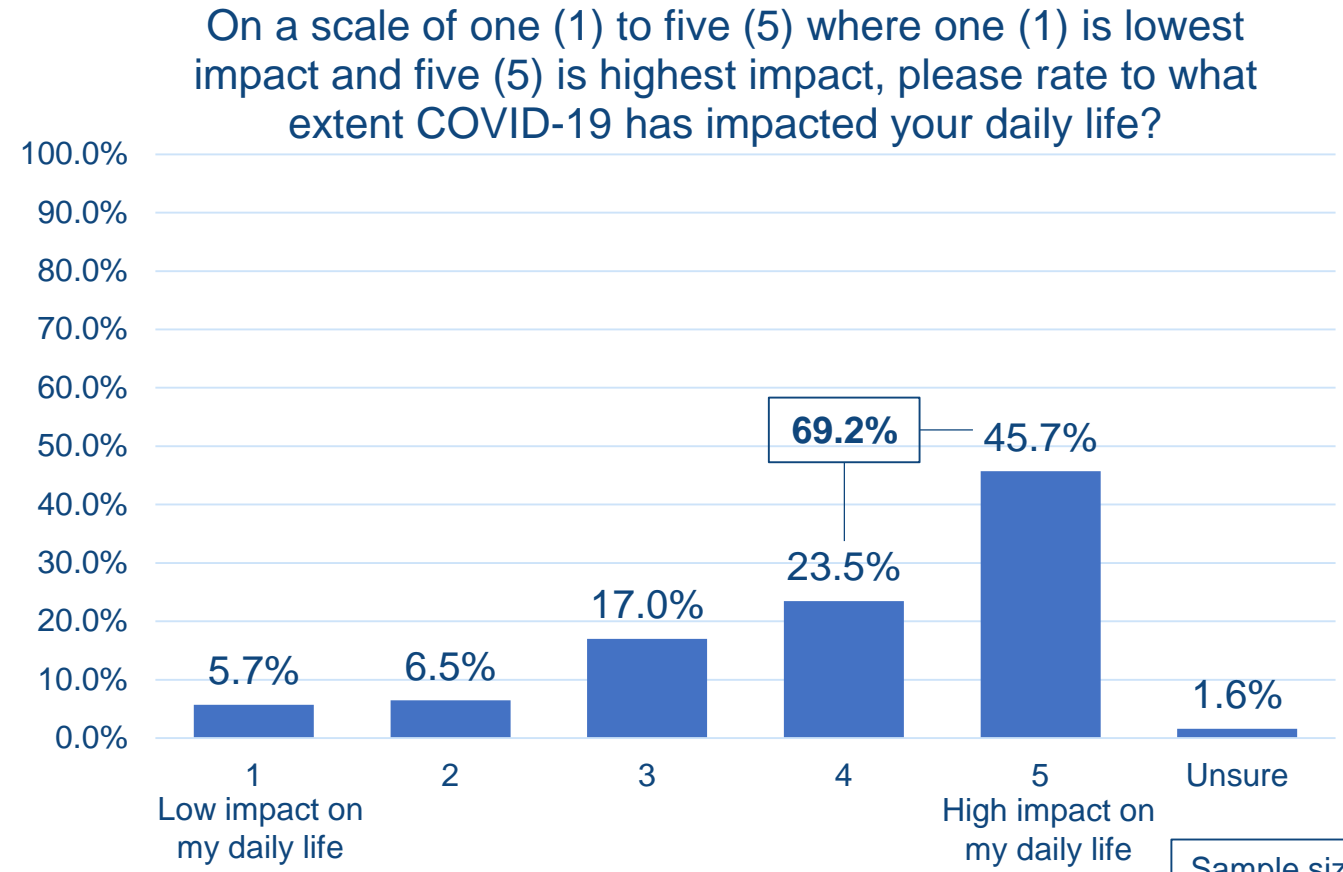
# Areas for Investigation

- Overall satisfaction
- Financial impact
- Preferred communication methods & frequency
- Shifts in energy consumption & corresponding behaviors
- Time-of-use rates as a potential method of saving money
- Importance of customer satisfaction & first contact resolution



# COVID-19 Research Among Connecticut Residents

- More than two-thirds of respondents (69.2%) reported COVID-19 has impacted their daily life.
- One-out-of-six respondents (16.6%) indicated their most pressing need due to COVID-19 the state government may be able to help with is “**money / financial assistance.**”
- The strong majority of residents (91.8%) are concerned with the **financial impact** of COVID-19 on Connecticut’s economy.



Sample size = 1,000



# Satisfaction with Utility's Response to COVID-19

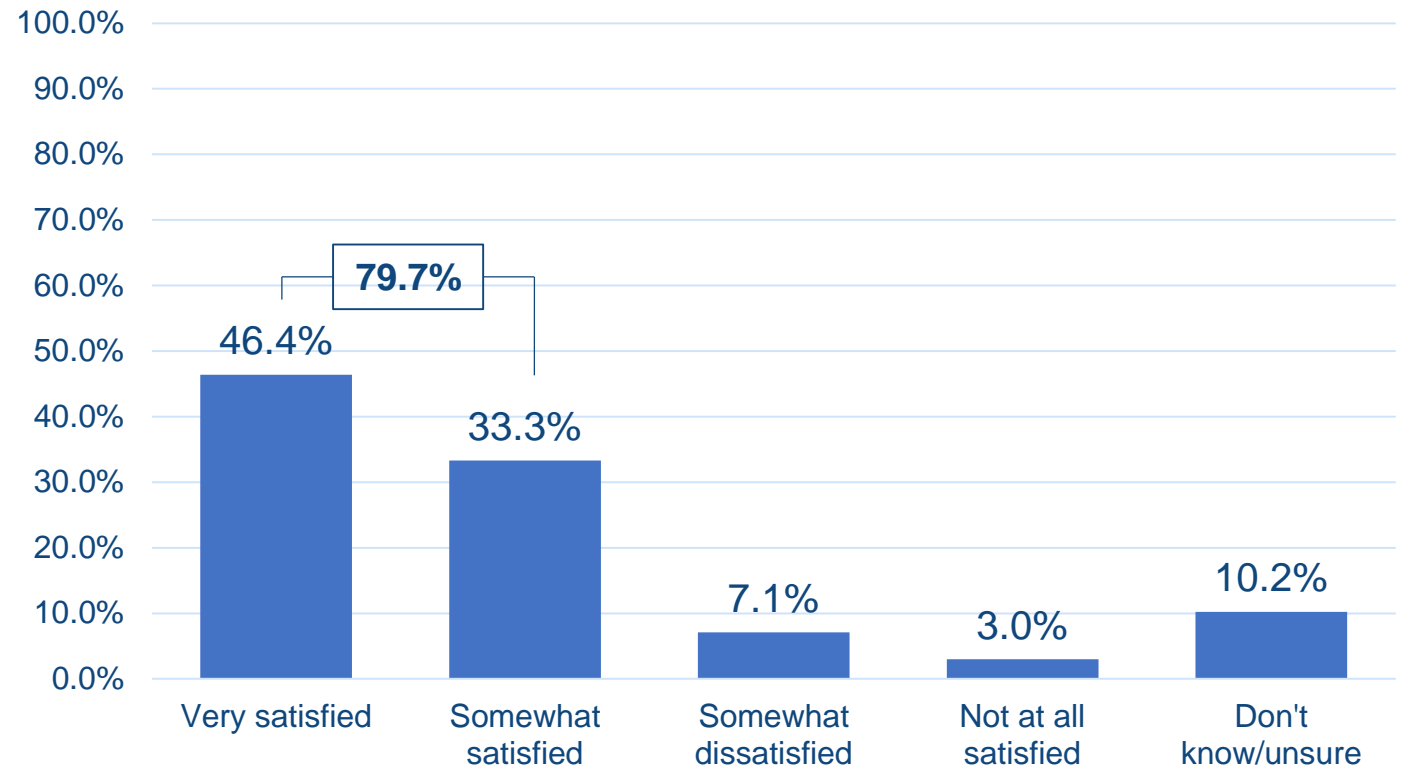
Overall goals and topics to cover as related to COVID



# Satisfaction with Utility's Response to COVID-19

- More customers with household incomes of \$50,000 or more (83.8%) reported they are satisfied with their utility's response to the COVID-19 pandemic than those with household incomes less than \$50,000 (77.3%).
- A greater percentage of male customers (81.4%) reported they are satisfied with their utility's response to COVID-19 than female customers (78.0%).
- Fewer customers from the Northeast (75.0%) indicated satisfaction with their utility's response to COVID-19 than customers from the South (79.2%), West (79.8%), or Midwest (82.8%).

How satisfied are you with your utility's overall response to the COVID-19 pandemic?



Sample size = 1,000

# Financial Impacts

Awareness of programs  
and services available

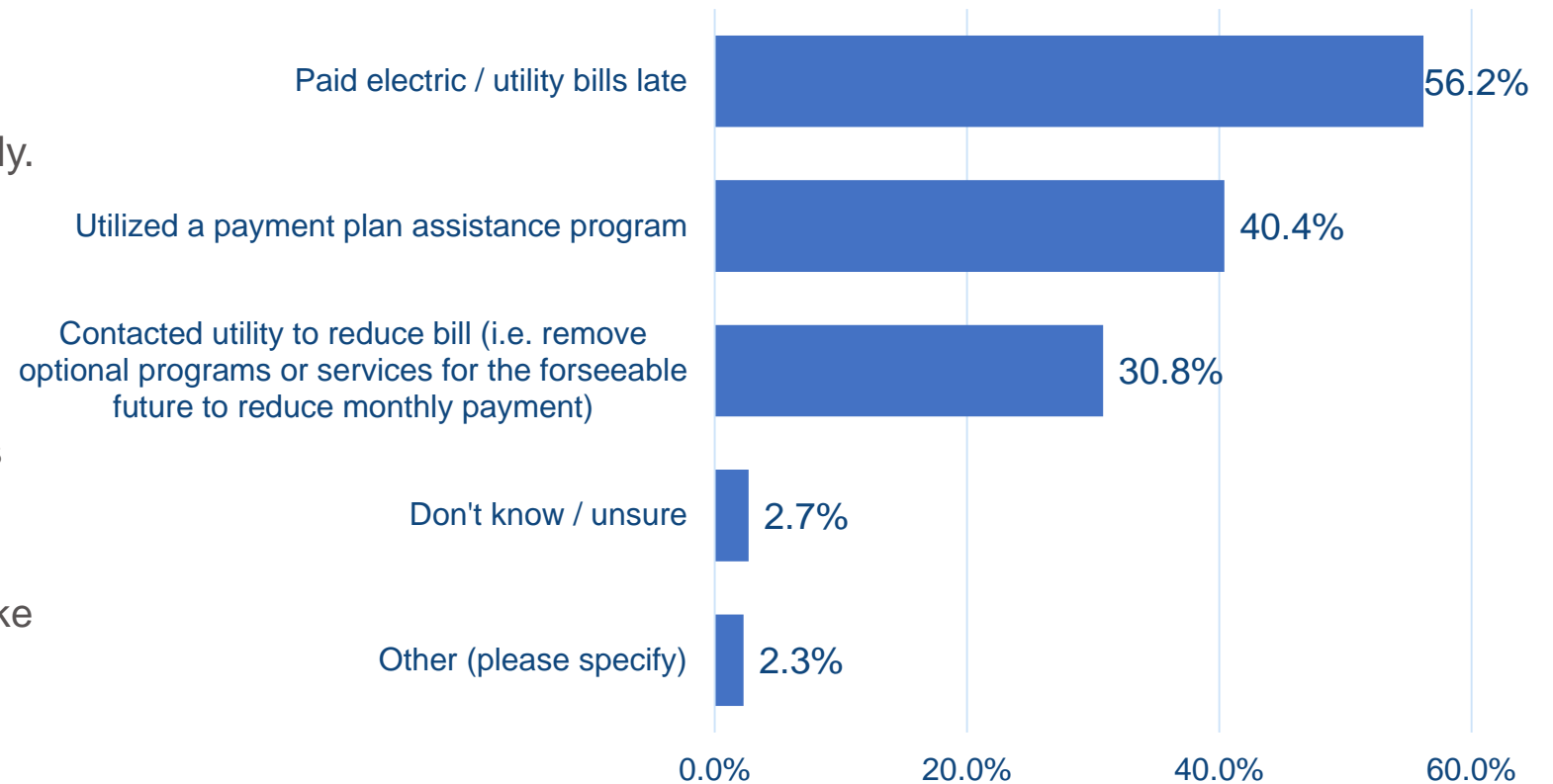
Financial assistance  
needed



# Financial Impacts: Electric Bill Payment Troubles

- One-quarter of surveyed customers (26.0%) indicated they have had to make adjustments in their electric bill payment due to the financial impact COVID-19 has had on them personally.
  - More customers with household incomes lower than \$50,000 (28.8%) have had to make adjustments to their electric bill payment during this time than customers with household incomes of \$50,000 or more (23.6%).
  - Fewer customers who own their residence (20.7%) have had to make adjustments to their electric bill payment than those who rent their residence (33.0%).

What adjustments have you had to make in your electric bill payment?

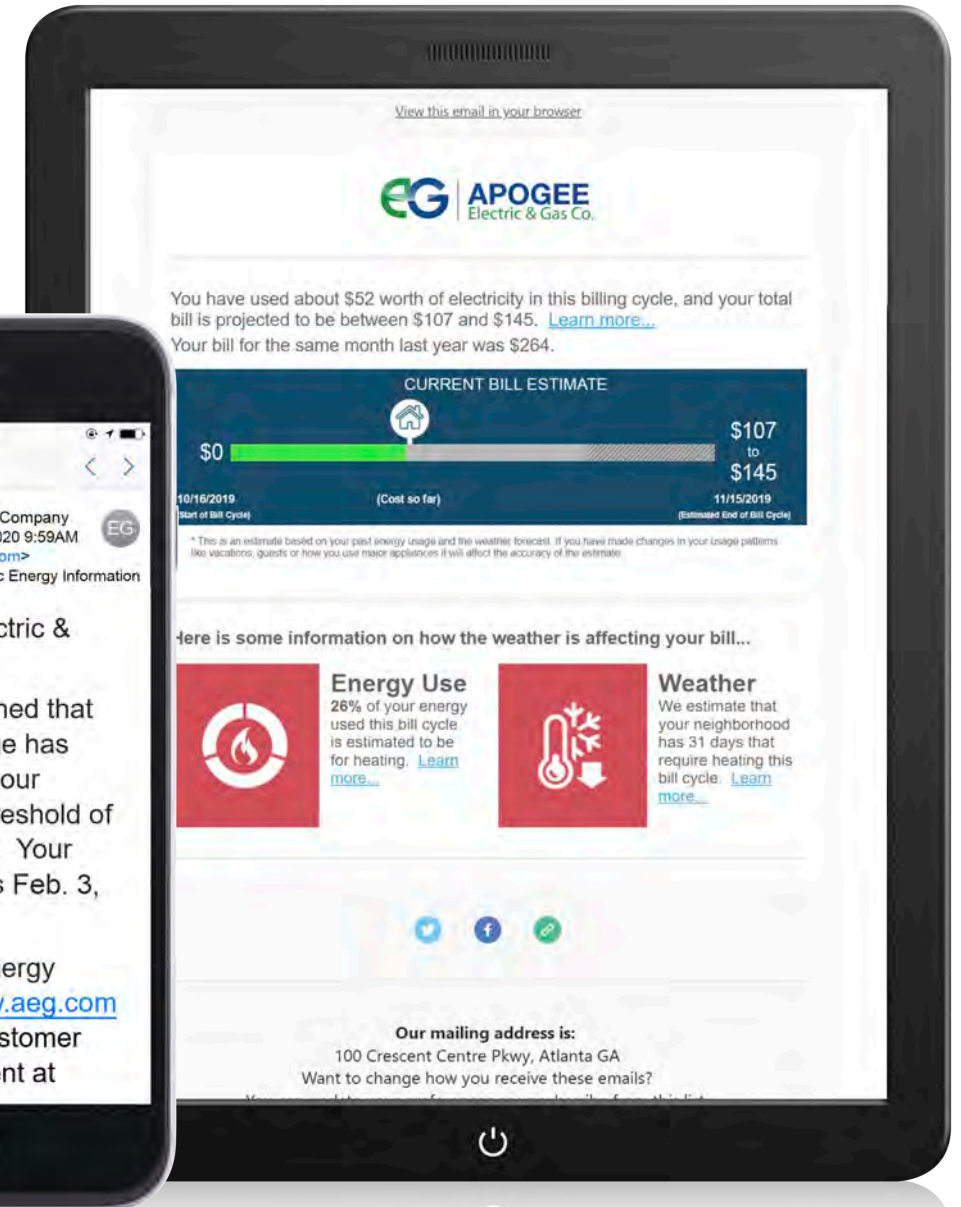
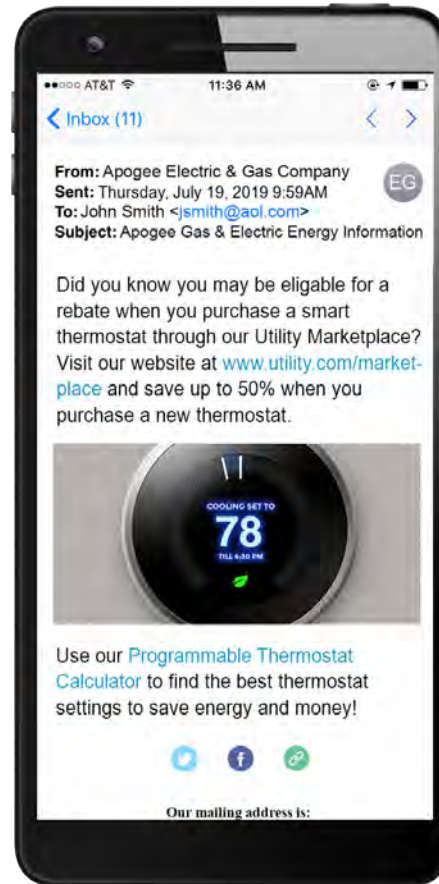


Sample size = 260



# Preferred Communication During COVID-19

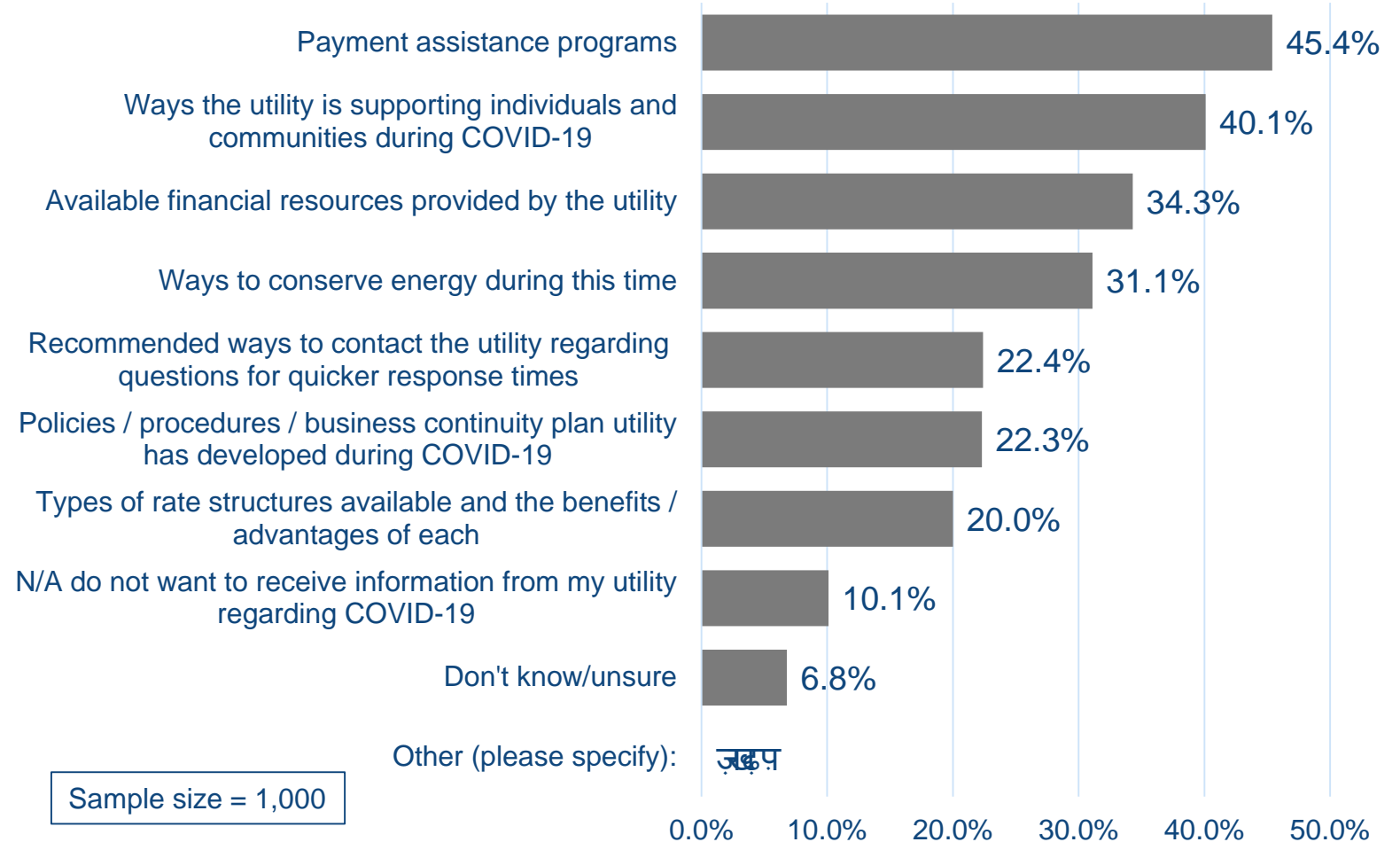
Desired topics of communication during this time and mediums to receive communication from the utility



# Preferred Communication During COVID-19

- One-third of customers (33.3%) prefer to receive communication from their utility regarding COVID-19 updates through “email.”
- Fewer customers 55 years of age and older (41.1%) seek information regarding “payment assistance programs” from their utility than customers 35 to 54 years of age (46.9%) or those under 35 years of age (48.5%).
- Fewer customers residing in the Northeast (55.2%) rated their utility’s communication during COVID-19 positively than those from the Midwest (63.9%), South (63.3%), or West (62.8%).

What COVID-19 related topics would you like to see more communication from your electric utility about?



# Preferred Communication During COVID-19

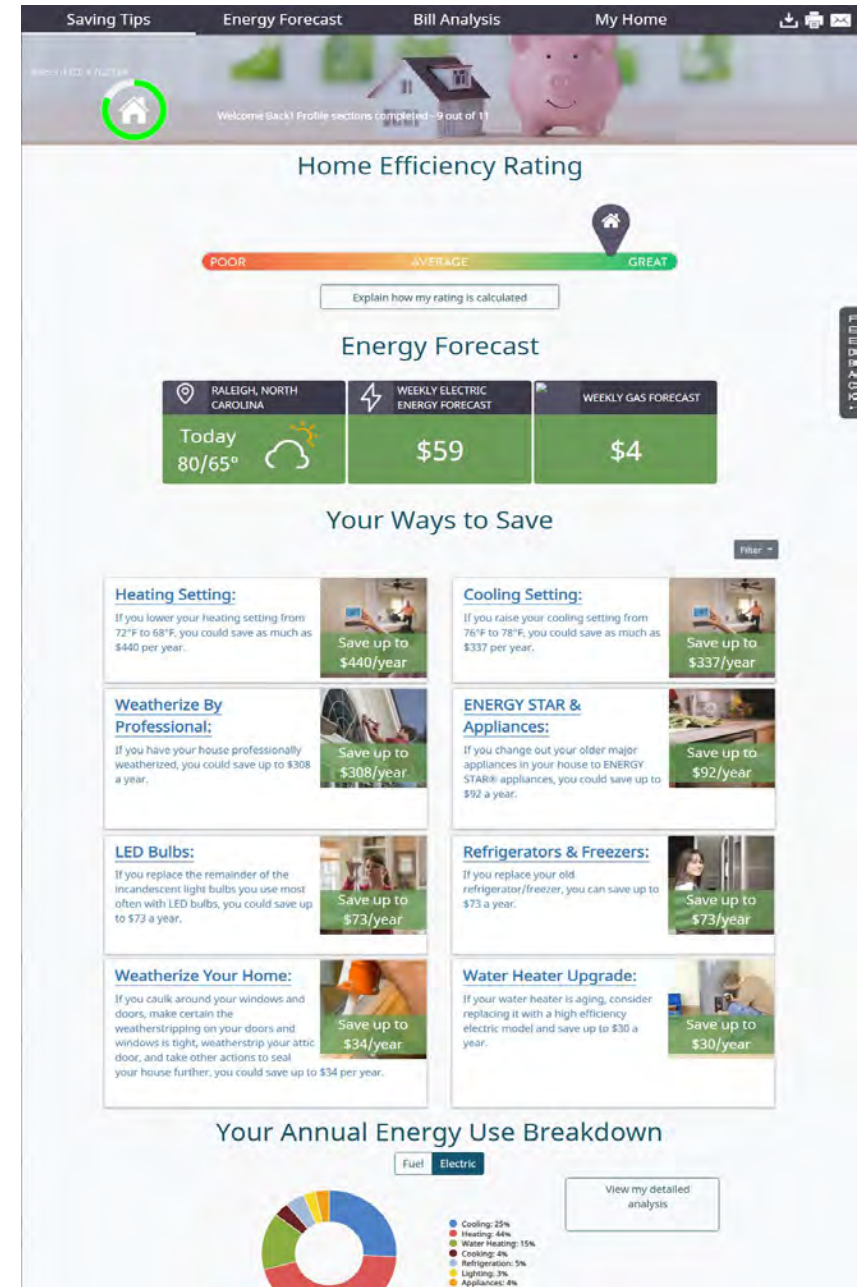
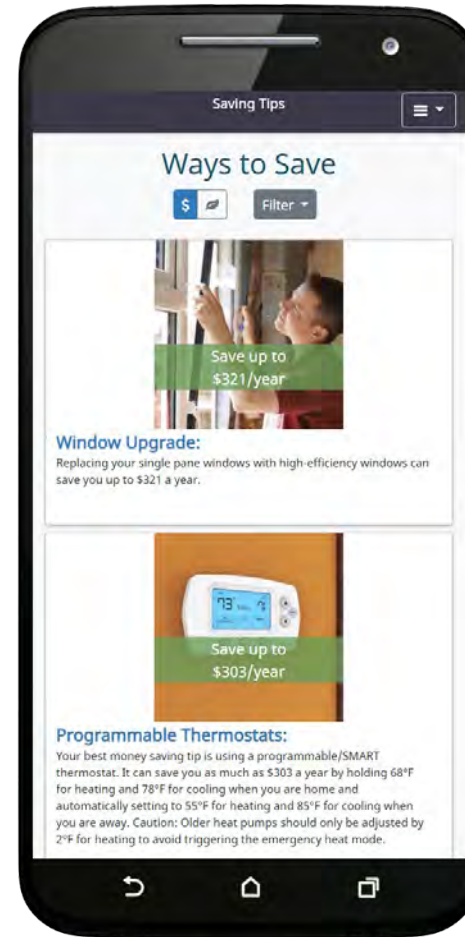
- Communicate with your members for the next 4 – 6 months
- Drive members to utility provided COVID-19 resources
- Communicate about payment options
- Low cost ways to save





# Energy Consumption and Ways to Conserve

Increases/Decreases  
Knowledge of ways to  
save

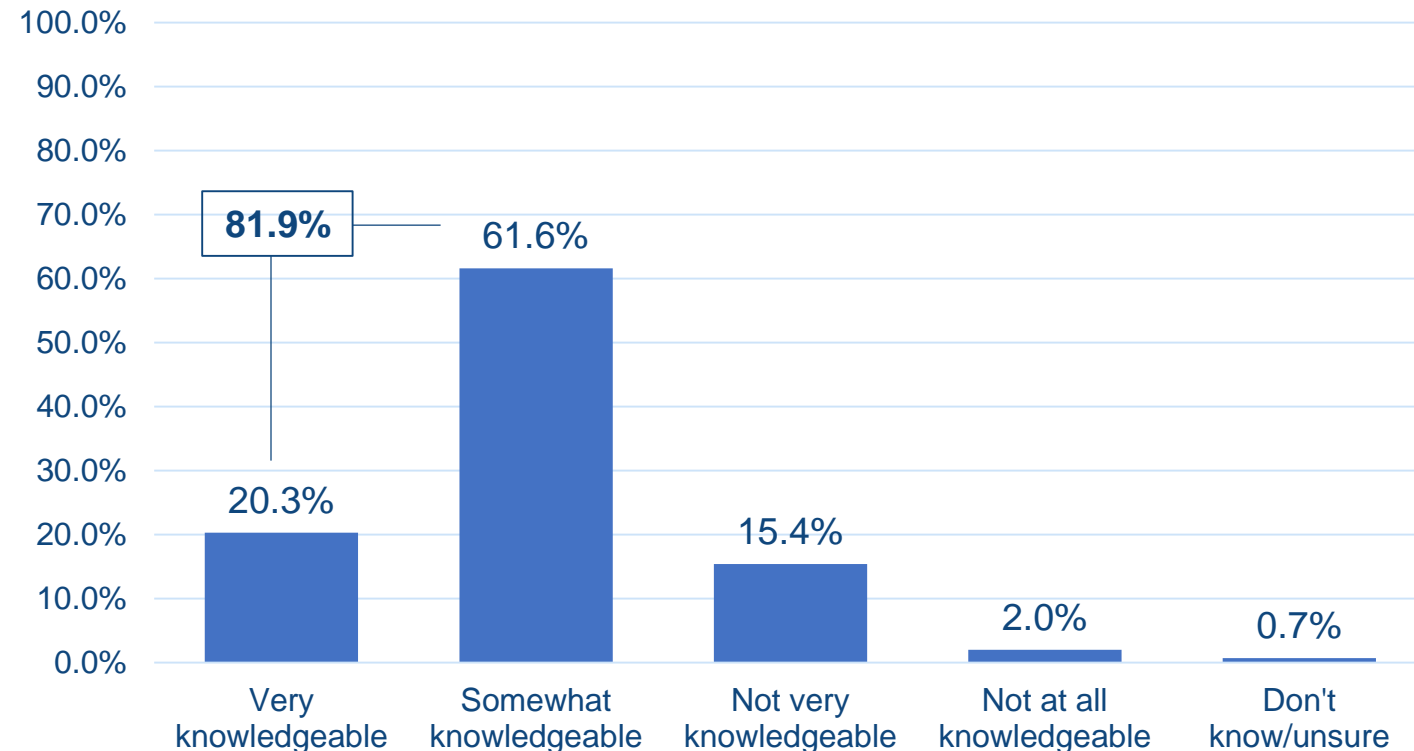




# Energy Consumption and Ways to Conserve

- Almost one-half of surveyed customers (46.9%) have noticed a shift in their household's energy consumption due to COVID-19
  - Of those respondents, 83.4% indicated this was an increase in energy consumption
- A greater percentage of male customers (84.4%) indicated they are knowledgeable of different ways to conserve energy in their home than female customers (79.4%).
- More customers who own their residence (85.3%) reported they are knowledgeable of different ways to conserve energy in their home than those who rent their residence (78.3%).

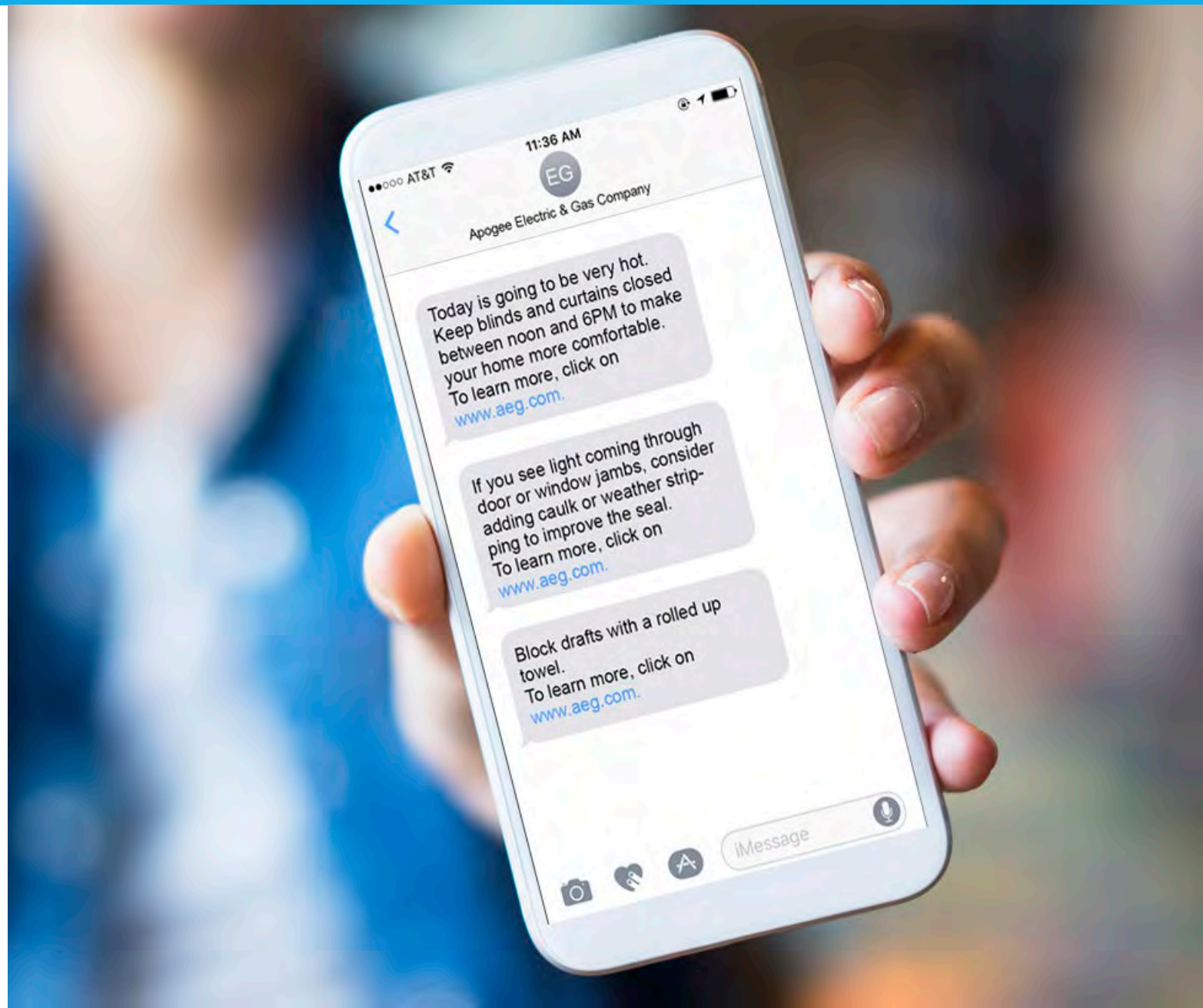
How would you rate your knowledge of different ways to conserve energy in your home?



Sample size = 1,000

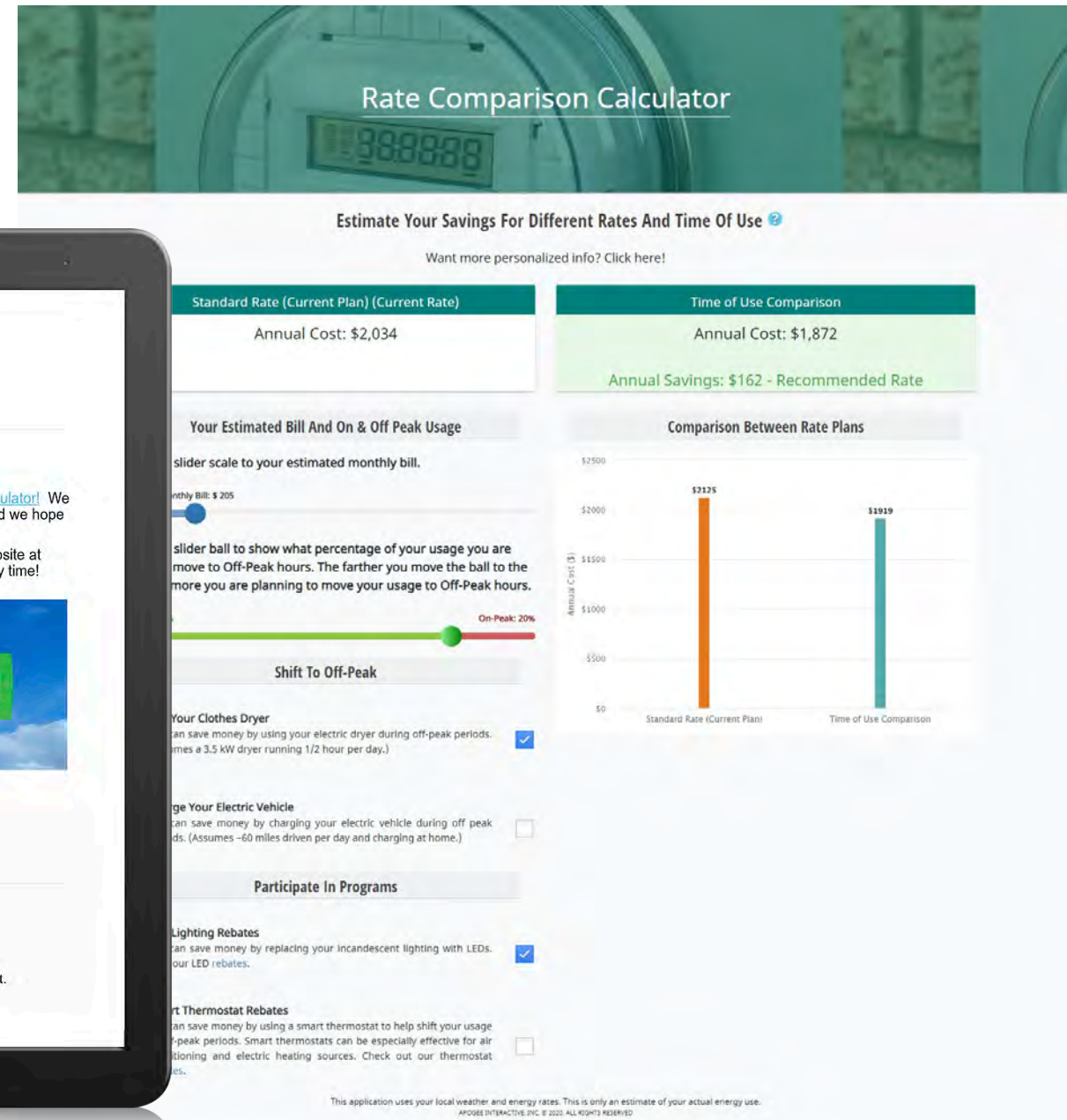
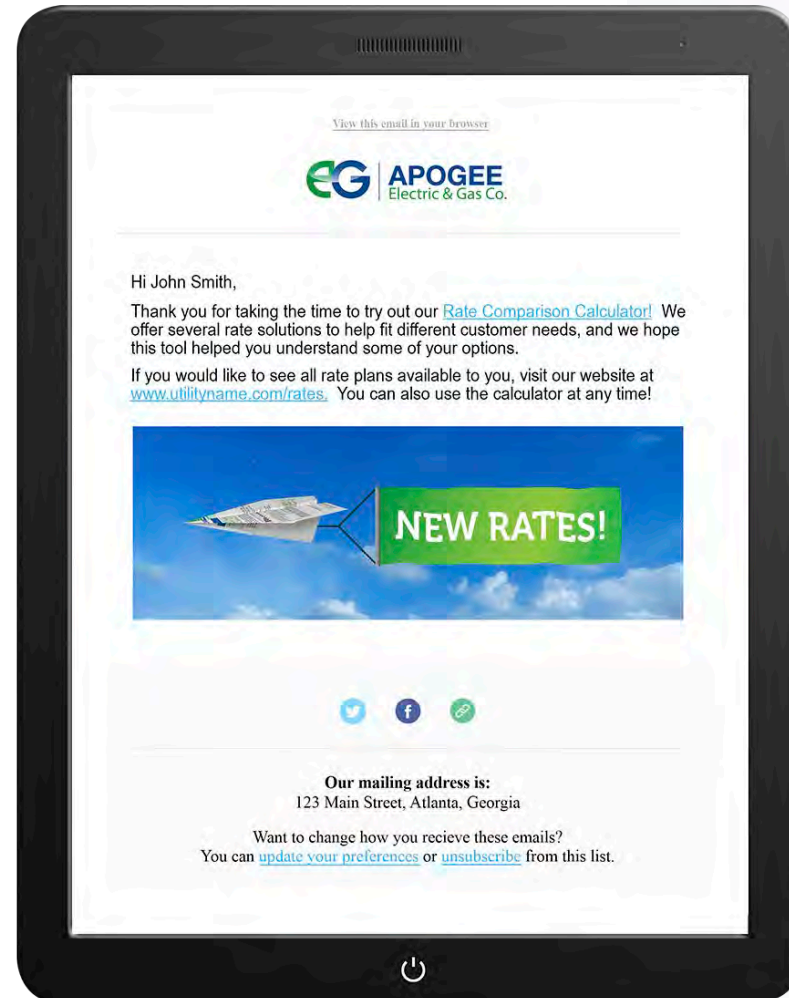
# Energy Consumption and Ways to Conserve

- Low-cost, no cost savings tips
- Low-income



# Time-of-Use Rates

Awareness of  
and interest in  
time-of-use  
rates



# Time-of-Use Rates

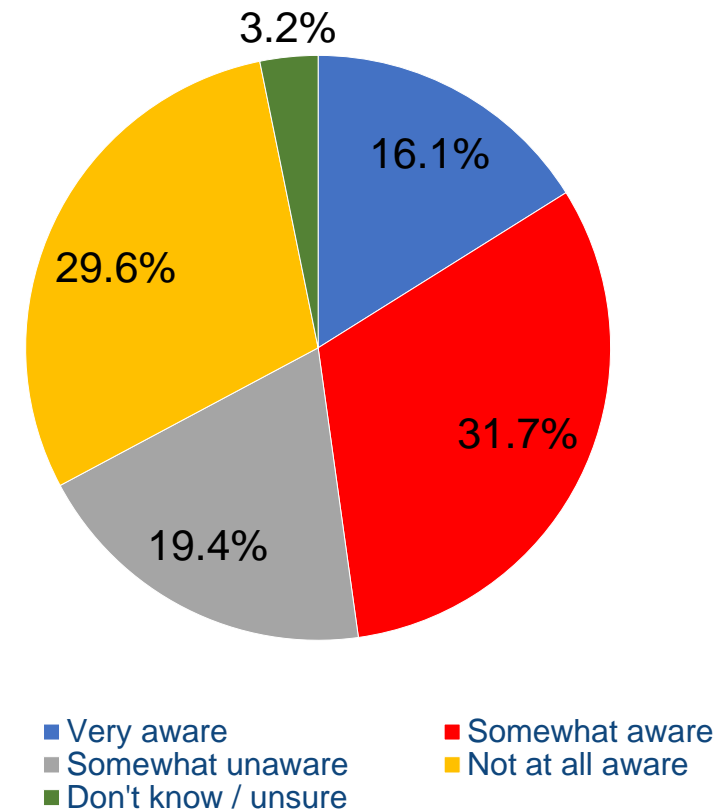
Less than one-half of customers (47.8%) are aware of time-of-use rate structures.

- More customers residing in the West (56.6%) expressed awareness of time-of-use rates than those residing in the South (46.6%), Midwest (42.1%), or Northeast (42.1%).
- Awareness of time-of-use rates was lower among customers 55 years of age and older (38.5%) than customers 35 to 54 years of age (50.3%), or those under 35 years of age (55.4%).

Over four-fifths of respondents (82.3%) are interested in their utility implementing time-of-use rate structures in the coming months.

- Fewer customers from the Northeast (76.3%) reported interest in their utility implementing time-of-use rates than those residing in the West (84.3%), Midwest (83.2%), or South (81.8%).

How aware are you of time-of-use rate structures, which allow you to pay a different rate for your electric usage should you use electricity during off-peak hours of the day?

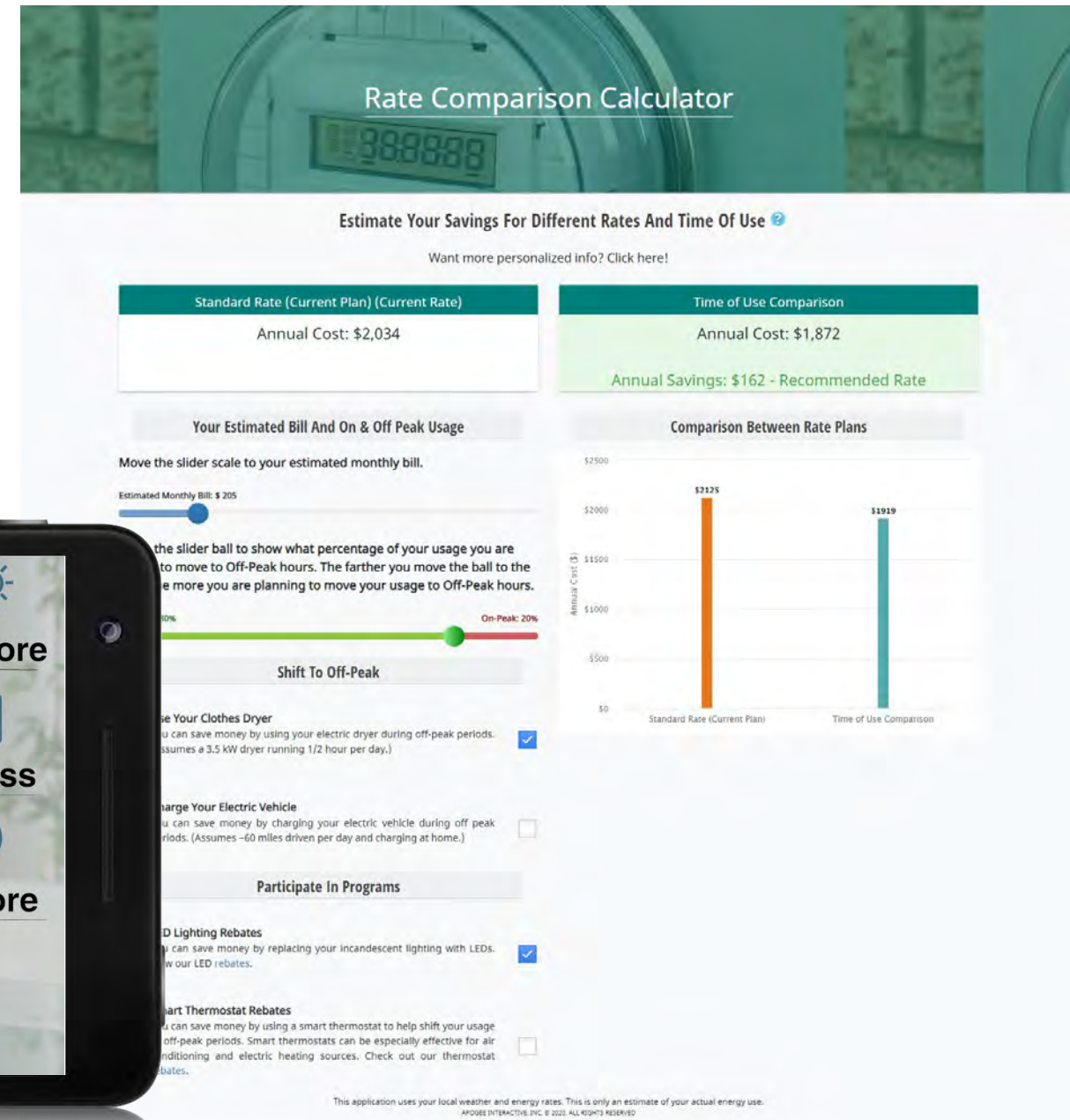


Sample size = 1,000



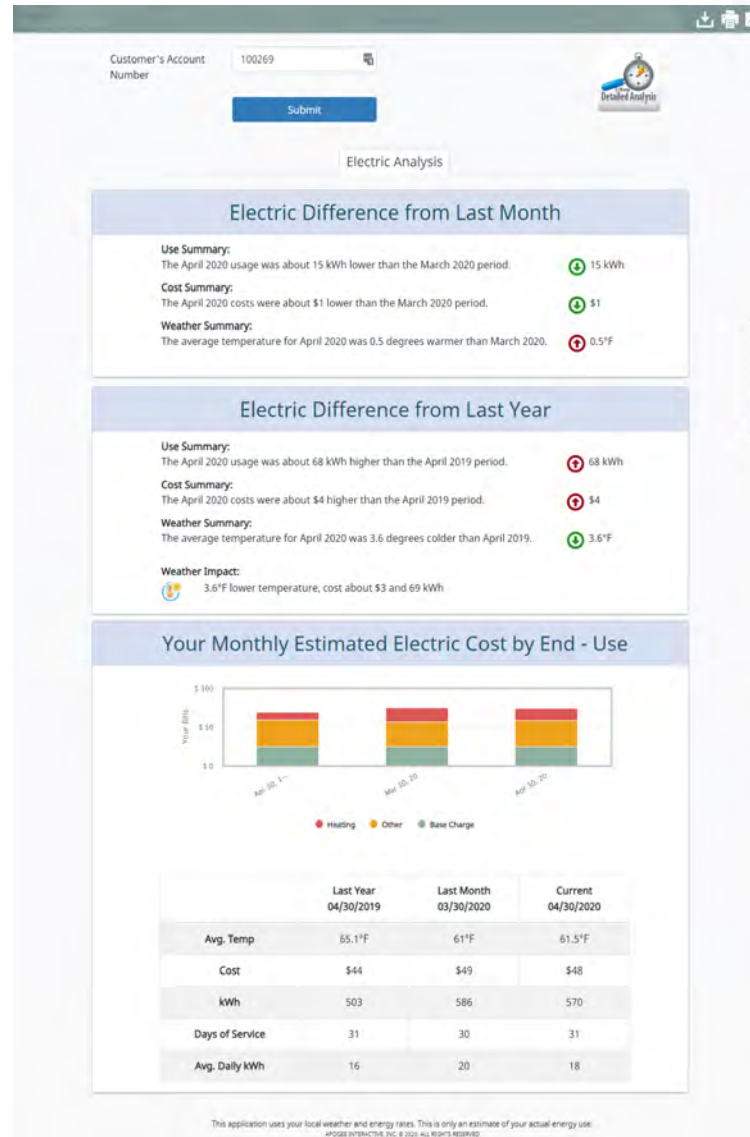
# Time-of-Use Rates

- Rate education
- Scenario-based tools



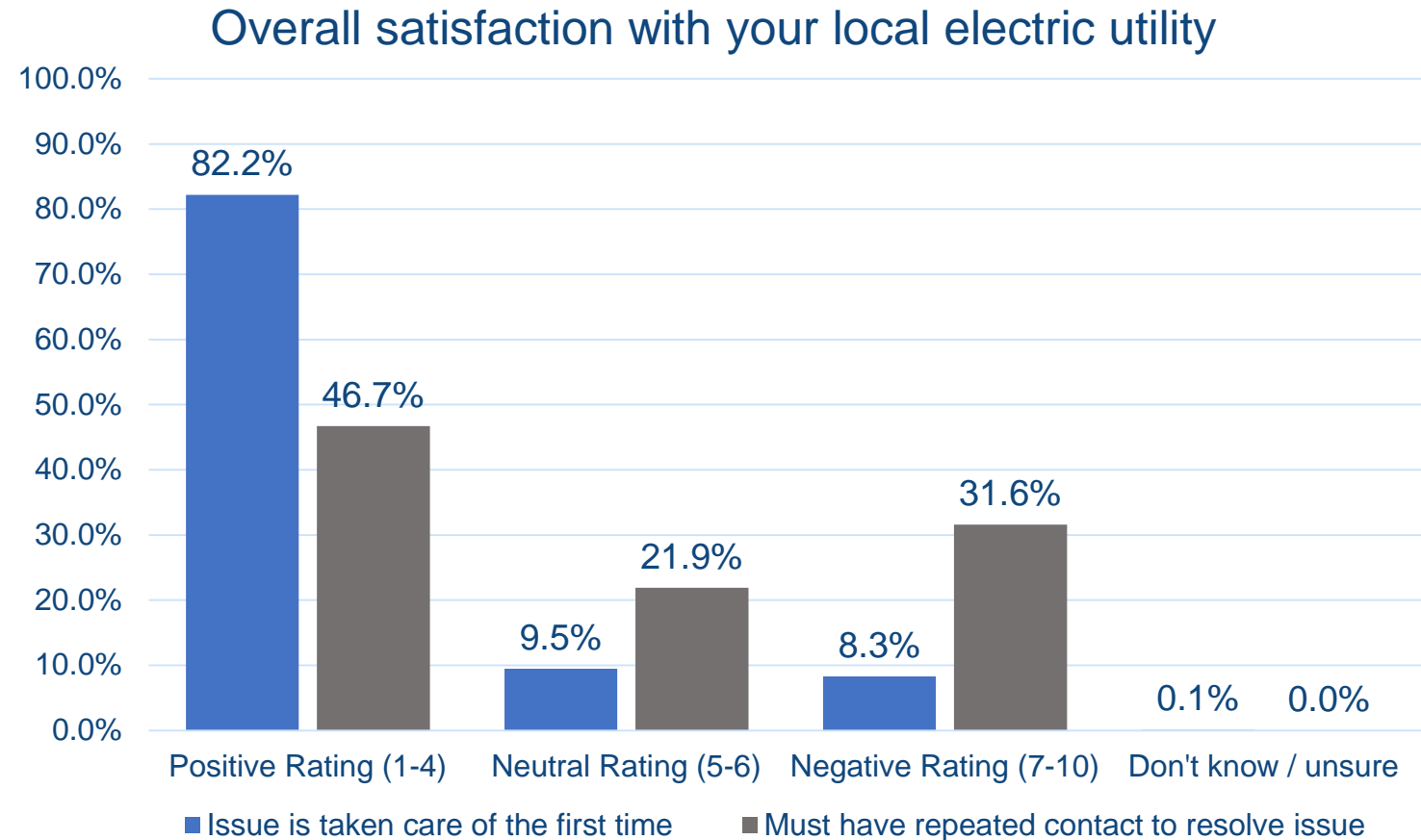
# Customer Loyalty and First Contact Resolution

Maintaining customer satisfaction during COVID-19



# Customer Satisfaction and First Contact Resolution During COVID-19

- Among customers who report their customer service issues are resolved upon the first point of contact, the average positive rating for overall satisfaction with their local electric utility is 82.2%.
  - Among customers who must have repeated contact with customer service to resolve their issue, the average positive overall satisfaction rating drops to 46.7%.
- It's important to focus efforts during the COVID-19 pandemic towards resolving customer service issues and inquiries on the first point of contact to continue to maintain strong customer satisfaction ratings.

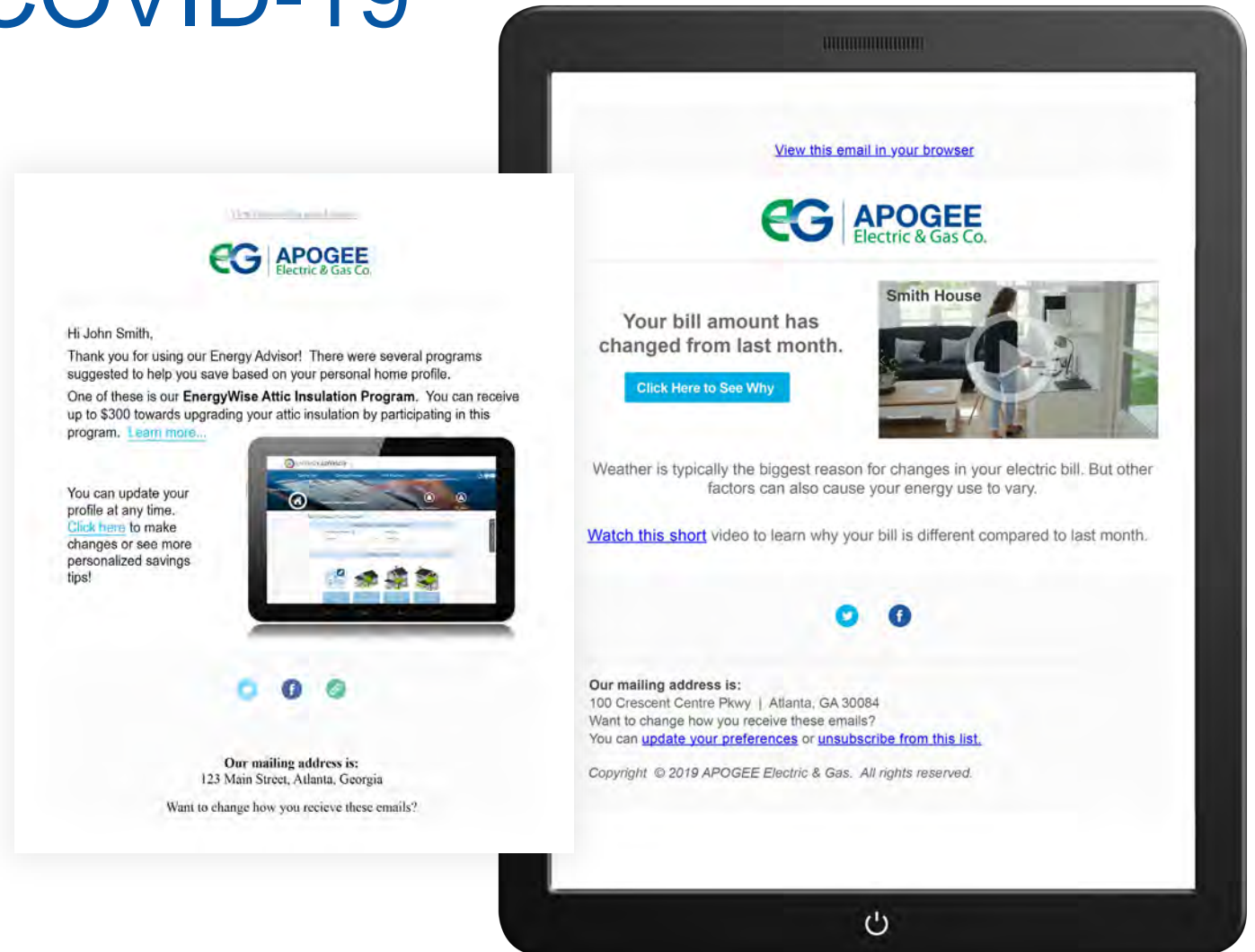


Sample size = 1,163



# Customer Satisfaction and First Contact Resolution During COVID-19

- Self-service
- Call prevention
- More informed customers





# GreatBlue's Final Thoughts...

## Think of the Future and Plan Ahead

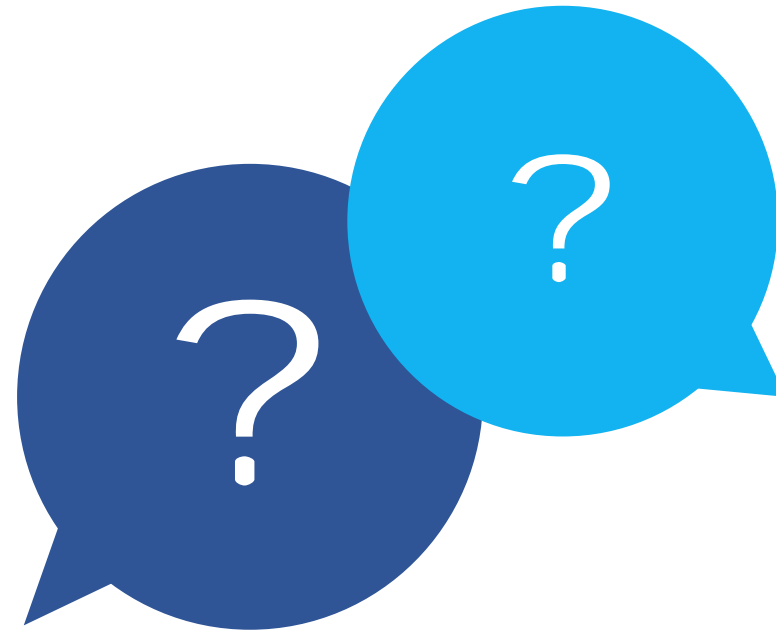
- Importance of focusing on customer needs and demands now as well as plan for the future
- Develop action plans to implement initiatives
- Regularly gather feedback from customers to provide improvements to service and program offerings
- Enhance customer experiences to drive satisfaction
- Continuous moving target

# Apogee's Final Thoughts...

- 40% increase in CTR
- NPS Score **increase 7 points** (increase of 23%)
- Content that customers **want to see**



# Any Questions



# Upcoming Webinars

June 4th, 2020 – 2:00PM EST

## *“The Perfect Storm”*

by:

Apogee Interactive, Inc.

**Joel Gilbert, P.E.**

Chief Software Architect

**Susan Gilbert, CEO**

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Thank You!