



# **J.D. POWER**

**Utility Pulse Study  
Coronavirus Situation**

**March 25-26, 2020**

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**Utility Global Business Intelligence**

## Pulse Survey Methodology

Fielded March 25-26

2,600 responses

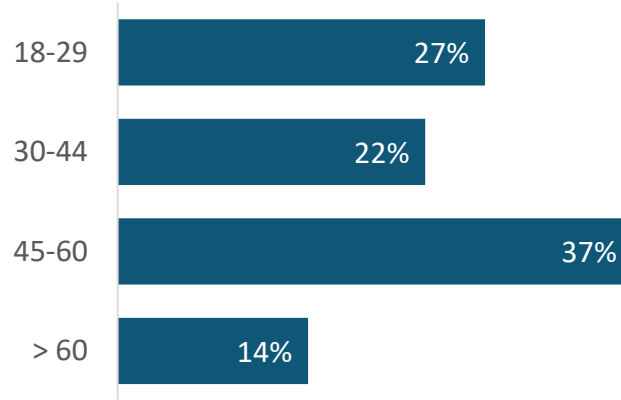
15 questions focusing on

- Electric Utility performance, including reliability, bill amount, communications, and customer service
- Coronavirus stress level
- Personal financial outlook, including ability to pay utility bills

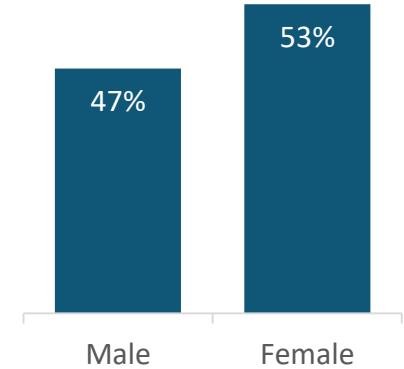
## Demographics

- Age
- Gender
- Income
- Geography Region
- Employment Status

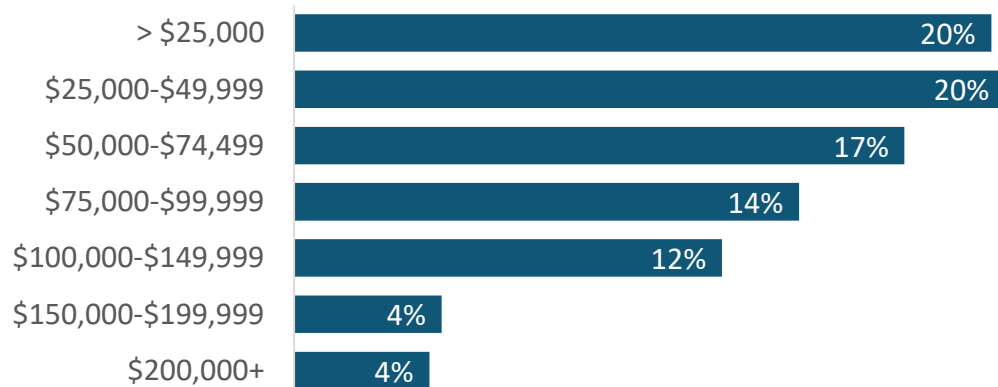
## Age



## Gender



## Income

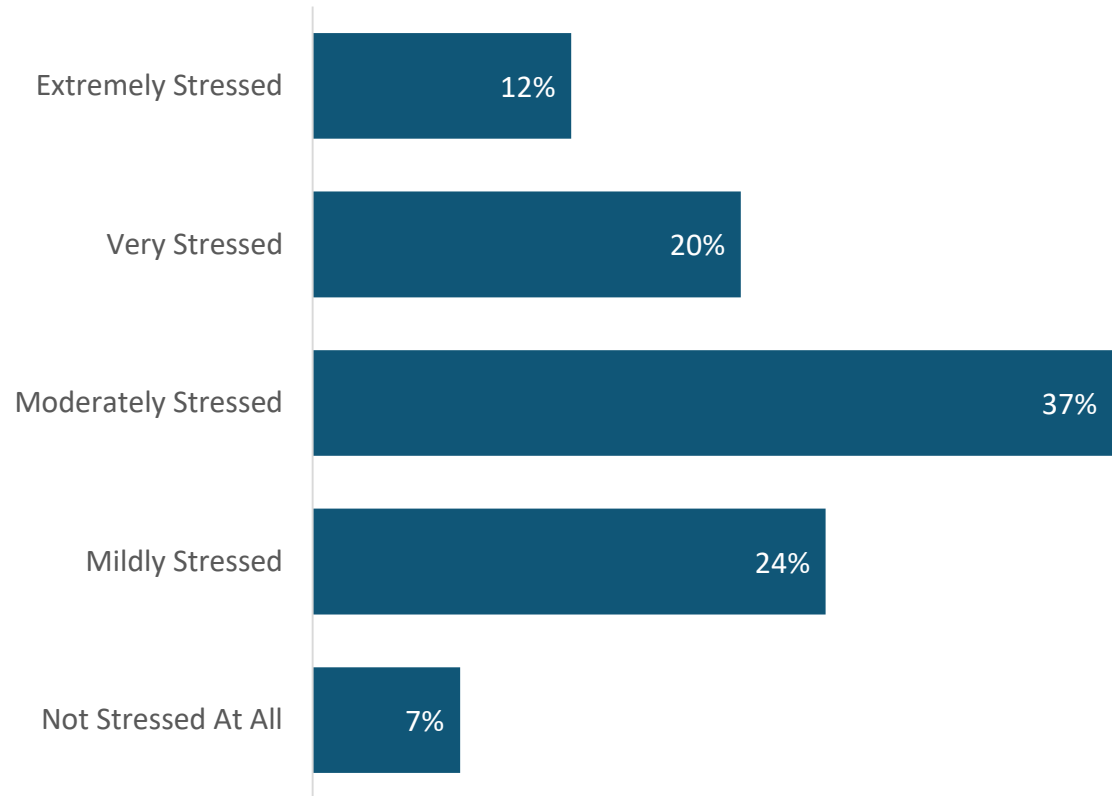


## Coronavirus Stress Level

32% of people are extremely, or very, stressed about the coronavirus situation

Only 7% of respondents are not at all stressed.

## How would you rate your level of stress about the overall coronavirus situation?



## Regions

The Middle Atlantic division (NJ, NY, PA) is the most stressed about the coronavirus situation

## How would you rate your level of stress about the overall coronavirus situation?

	Not at all stressed	Mildly stressed	Moderately stressed	Very stressed	Extremely stressed
East North Central	6%	23%	41%	21%	10%
East South Central	5%	25%	37%	16%	16%
Middle Atlantic	5%	22%	36%	22%	15%
Mountain	8%	23%	43%	16%	10%
New England	8%	21%	39%	18%	14%
Pacific	7%	26%	36%	21%	11%
South Atlantic	6%	27%	34%	20%	13%
West North Central	9%	23%	43%	17%	9%
West South Central	10%	24%	35%	20%	11%

Based on the 9 US Census Bureau Divisions:  
[www2.census.gov/geo/pdfs/maps-data/maps/reference/us\\_regdiv.pdf](http://www2.census.gov/geo/pdfs/maps-data/maps/reference/us_regdiv.pdf)

## Coronavirus Stress by Age

30-60 year old people are the most stressed about the coronavirus situation

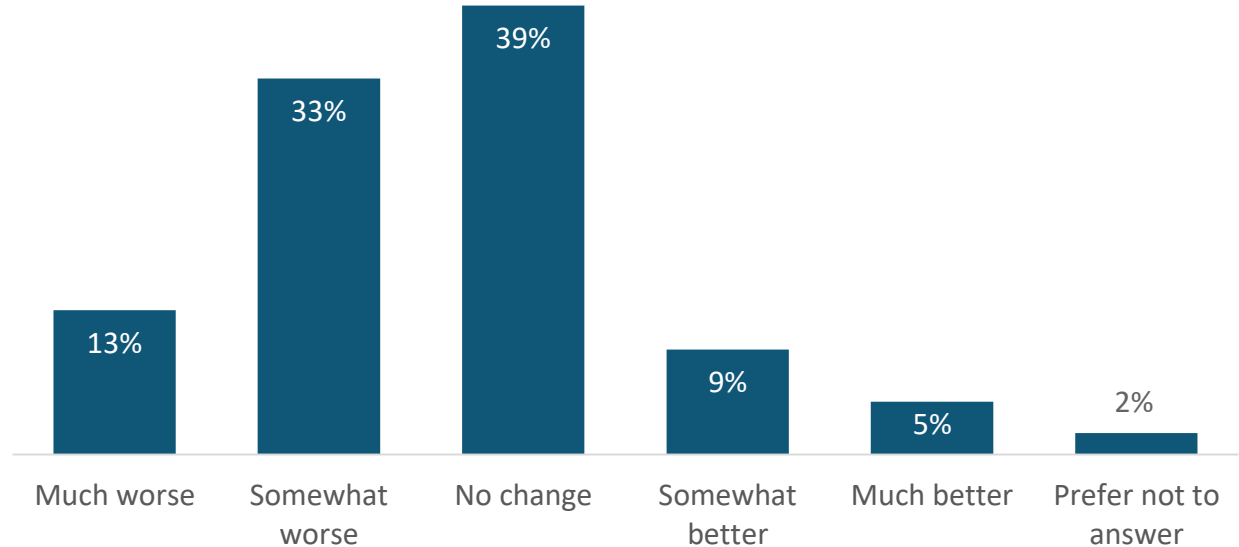
The youngest and oldest generations are the least stressed about the coronavirus situation.

How would you rate your level of stress about the overall Coronavirus situation?	18-29	30-44	45-60	> 60
Not at all stressed	8%	5%	7%	7%
Mildly stressed	25%	24%	23%	25%
Moderately stressed	38%	36%	35%	43%
Very stressed	19%	21%	21%	17%
Extremely stressed	10%	14%	14%	9%

## Economic Outlook

46% of customers state their financial situation in two months is likely to be somewhat, or much, worse

Compared to before the coronavirus situation started, do you expect your financial situation in two months to be...

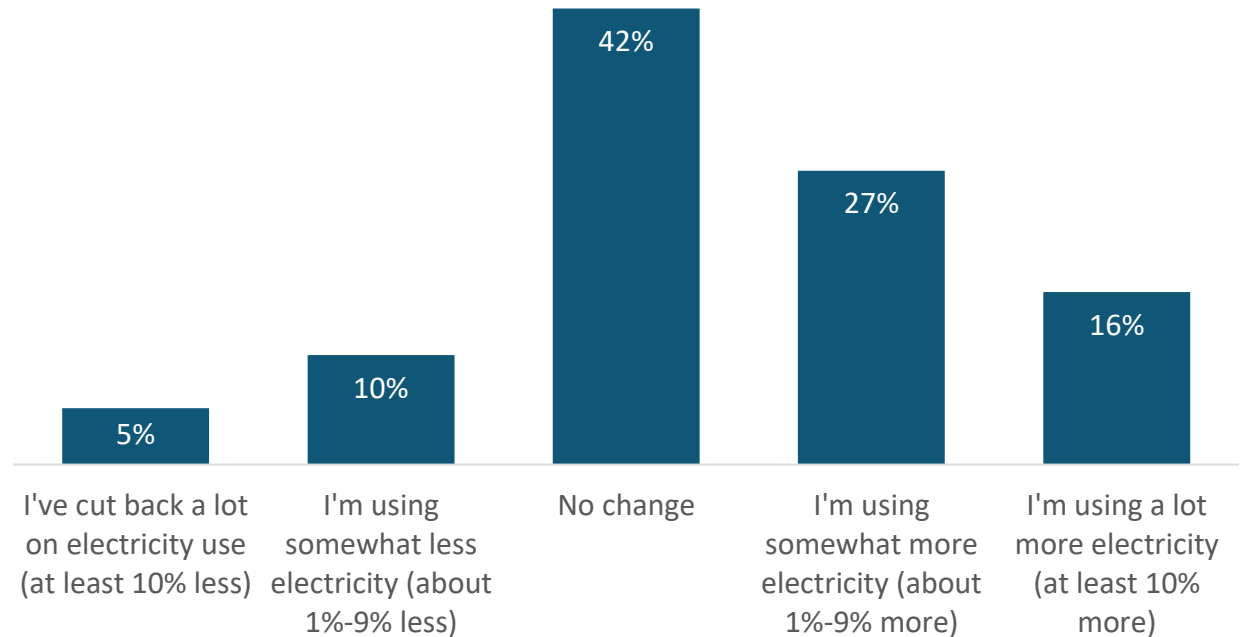


## Change in Electricity Usage

43% of customers state they are using more electricity compared to last month

The largest group expect their bill amount will not change compared to last month.

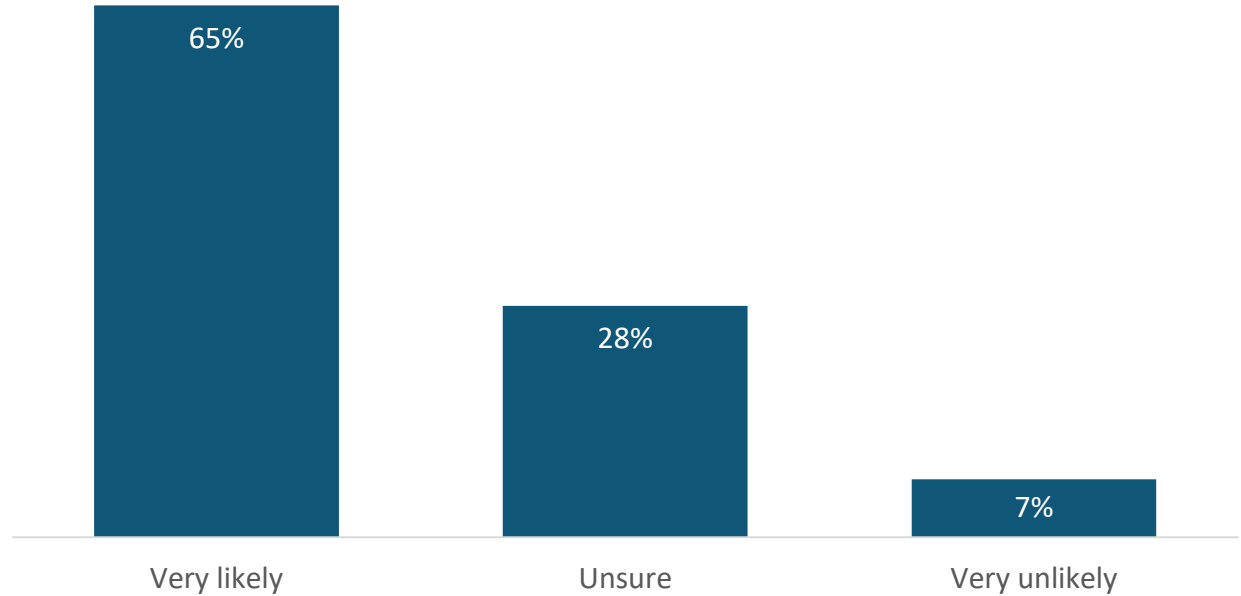
How much do you expect your electric bill amount to change this month compared to last month?



## Ability to Pay Bill

7% of customers state they are very unlikely to be able to pay next month's bill

## How likely are you to be able to pay your utility bill next month?





## Utility Preparedness

Unemployed, furloughed, and part time workers from home, are most likely to have problems paying their bill next month

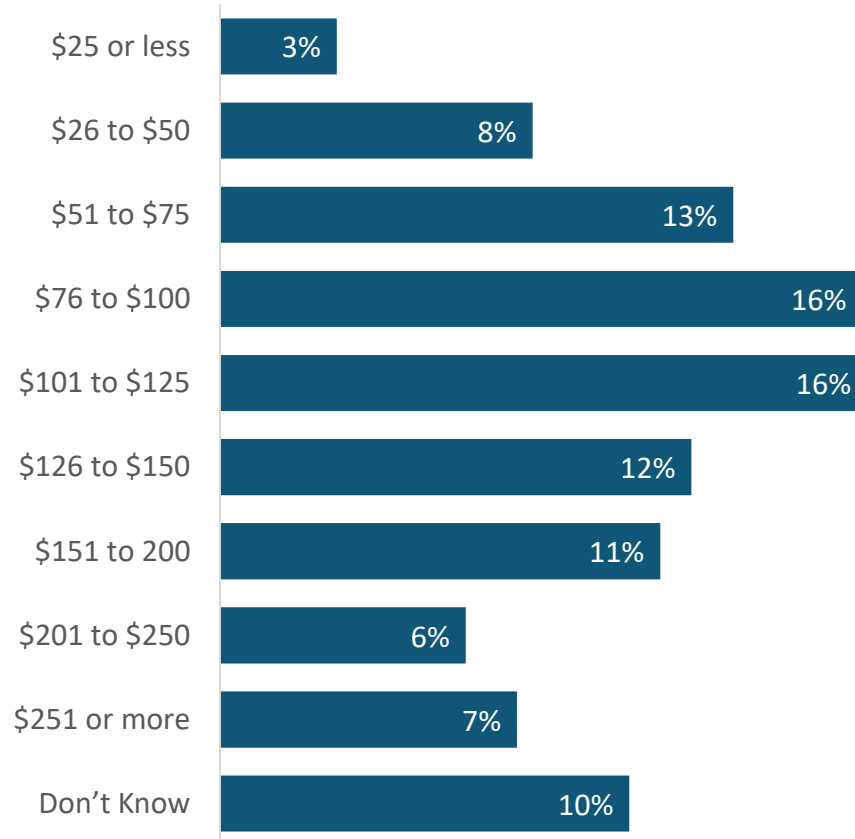
## How likely are you to be able to pay your utility bill next month?

Employment Status	Very likely	Unsure	Very unlikely
Unemployed since March 1, 2020	33%	51%	16%
Furloughed/Temporarily laid off	53%	38%	9%
Part-time: always worked from home	56%	31%	13%
Unemployed before March 1, 2020	56%	33%	11%
Student: physically attending school	57%	38%	5%
Student: remote school	57%	37%	6%
Part-time: still going to work	58%	36%	6%
Part-time: temporarily worked from home	61%	34%	5%
Full-time: always worked from home	64%	31%	5%
Full-time: still going to work	70%	23%	7%
Retired	73%	21%	6%
Full-time: temporarily working from home	73%	22%	5%

## Average Bill

Average monthly bill is about \$110

## Average monthly bill

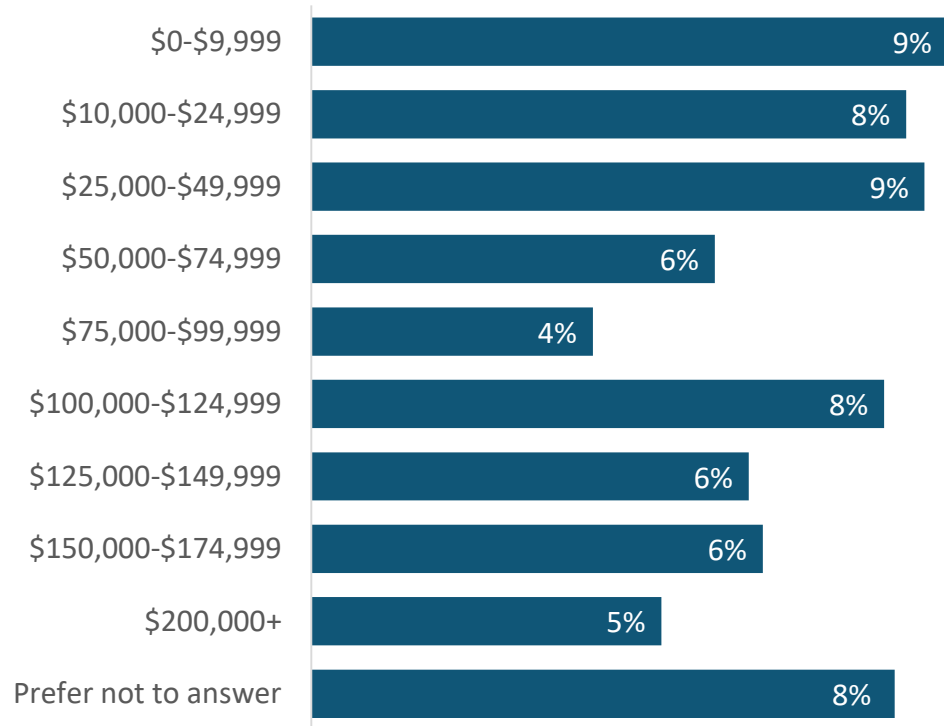


## Payment challenges by income

Although lower income customers are most likely to have problems with the monthly bill, customers at all income levels may have problems

Similar to the recession of the late 2000s and early 2010s, middle and higher income customers may require assistance. Utilities should consider these customers, as well as the low income customers, when communicating about support programs.

## Percentage of customers reporting they are very likely to have problems paying their bill by household income

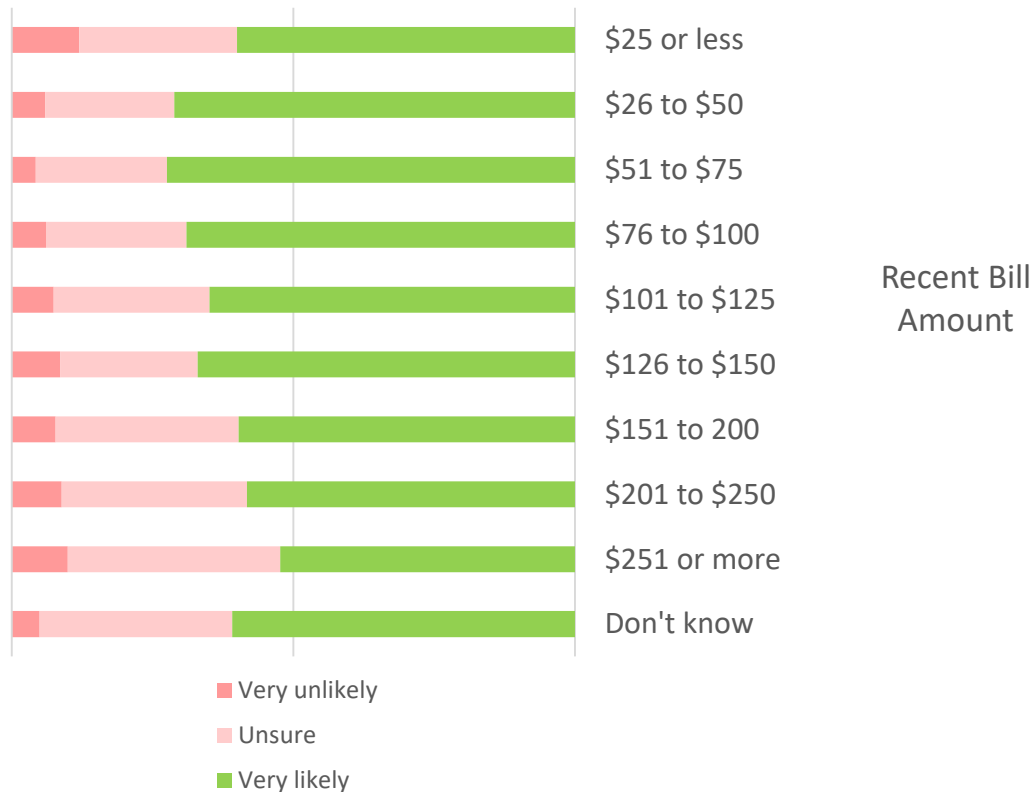


Percentage of customers very unlikely to be able to pay utility bill next month

## Ability to Pay Bill

The higher the average bill amount the less confident the consumer is about their ability to pay next month's bill

## How would you rate your ability to pay your utility bill next month?

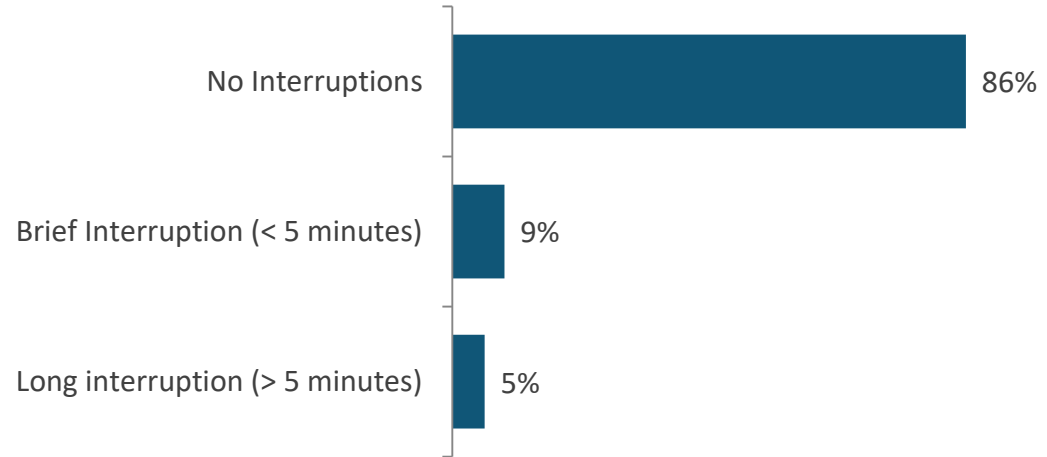


## Service Interruptions

# The reliability of the electric supply is unchanged

The number of short and long outages is consistent with recent customer experiences.

## Electric Outages in the last week



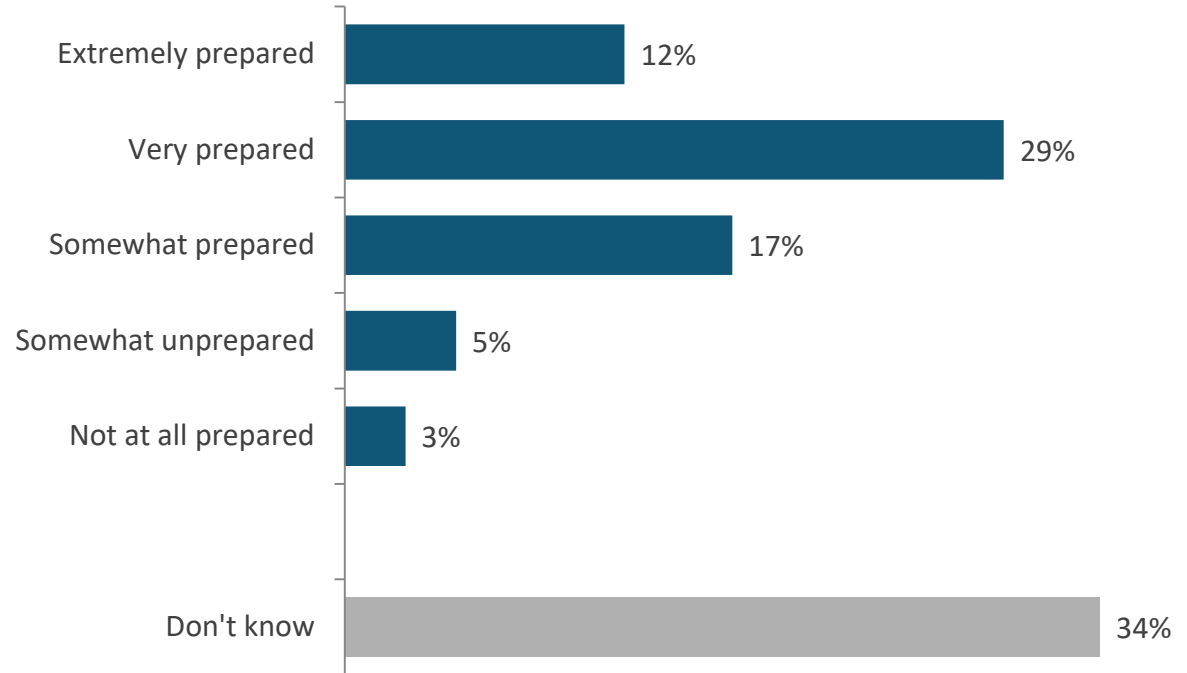
## Preparedness

34% of customers don't know how well prepared their utility is to provide reliable power during the coronavirus crisis

41% of customers state their electric utility is either extremely, or very, prepared to provide reliable power during the crisis.

Only 8% specifically state they are concerned their electric utility is not prepared to provide power during the crisis.

### How prepared is your utility to continue to provide reliable power during the crisis?



## Utility Preparedness

Utilities in the East South Central are viewed as the most prepared to continue to provide reliable power during the crisis

Utilities in the Mountain area are viewed as the least prepared.

Census Region	East North Central	East South Central	Middle Atlantic	Mountain	New England	Pacific	South Atlantic	West North Central	West South Central
Not at all prepared	3%	2%	2%	4%	2%	3%	3%	1%	2%
Somewhat unprepared	4%	4%	6%	2%	6%	7%	3%	6%	5%
Very prepared	29%	27%	33%	33%	28%	27%	34%	27%	22%
Somewhat prepared	17%	18%	17%	14%	15%	21%	15%	17%	19%
Extremely prepared	13%	17%	12%	11%	12%	10%	14%	13%	13%
Don't know	34%	31%	31%	35%	37%	33%	31%	37%	39%

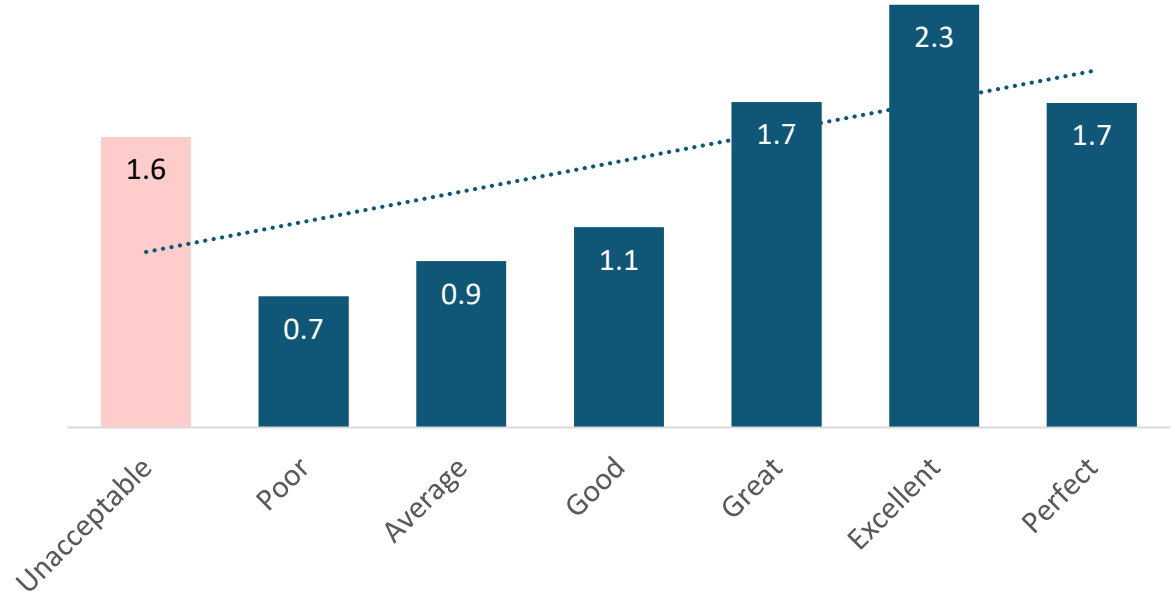
Based on the 9 US Census Bureau Divisions:  
[www2.census.gov/geo/pdfs/maps-data/maps/reference/us\\_regdiv.pdf](http://www2.census.gov/geo/pdfs/maps-data/maps/reference/us_regdiv.pdf)

## Communications

The more topics recalled from their utility, the better customers rate the utility's handling of the coronavirus situation

### # Communication Topics Recalled versus Utility Rating

Number of coronavirus action topics recalled hearing from utility



Overall, how would you rate your utility on their handling of the Coronavirus situation?

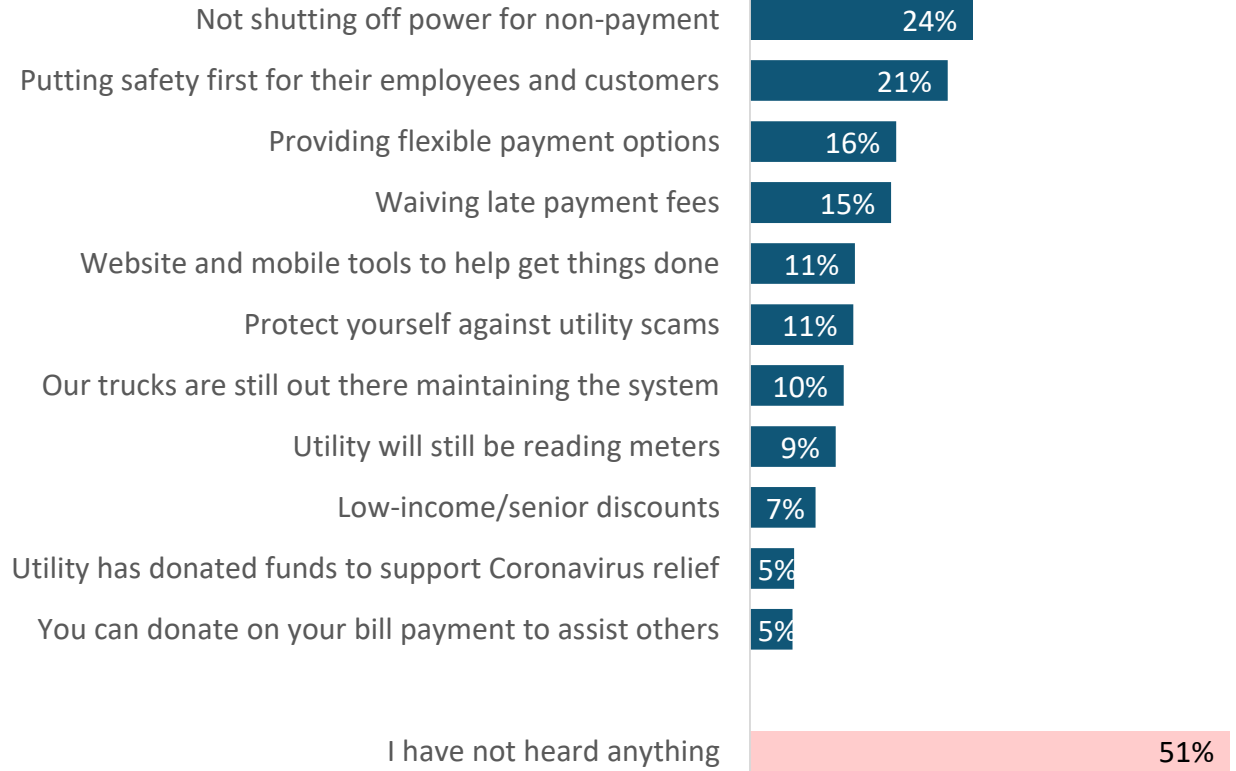


## Coronavirus Communication Topic Recall

Over half of customers state they have not heard from their utility in connection with the coronavirus situation

The most frequently recalled topics are not shutting of power for non-payment and safety of employees and customers.

## Coronavirus related topics that customers have recently heard about



Customers recalling information are asked to mark all that apply, so the percentages do not sum to 100%.

Has your utility communicated about any of the following related to Coronavirus action?

## Actions Communicated

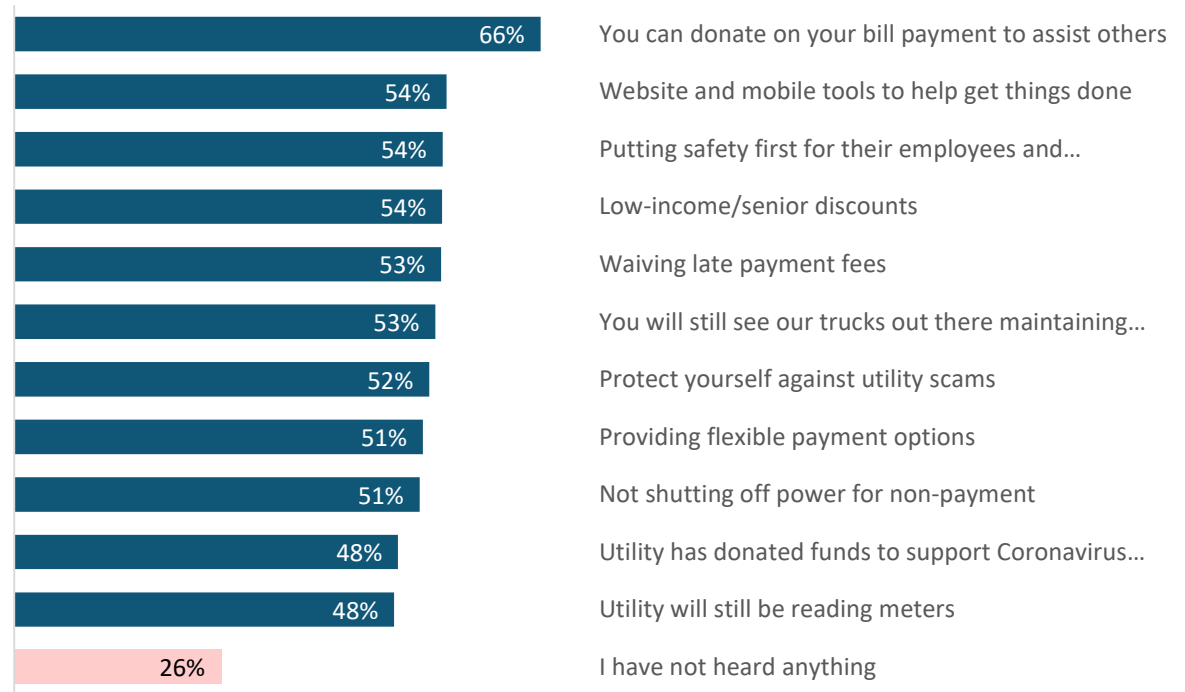
Enabling customers to assist improves overall perceptions the most

All communications topics substantially lift perceptions of utility performance in handling the coronavirus situation.

Of the 51% of customers that have not heard anything, only 26% consider the utility's performance to be great, excellent or perfect

## Overall, how would you rate your utility on their handling of the coronavirus situation – by action communicated

% rating Great, Excellent, or Perfect  
(top 3 box)



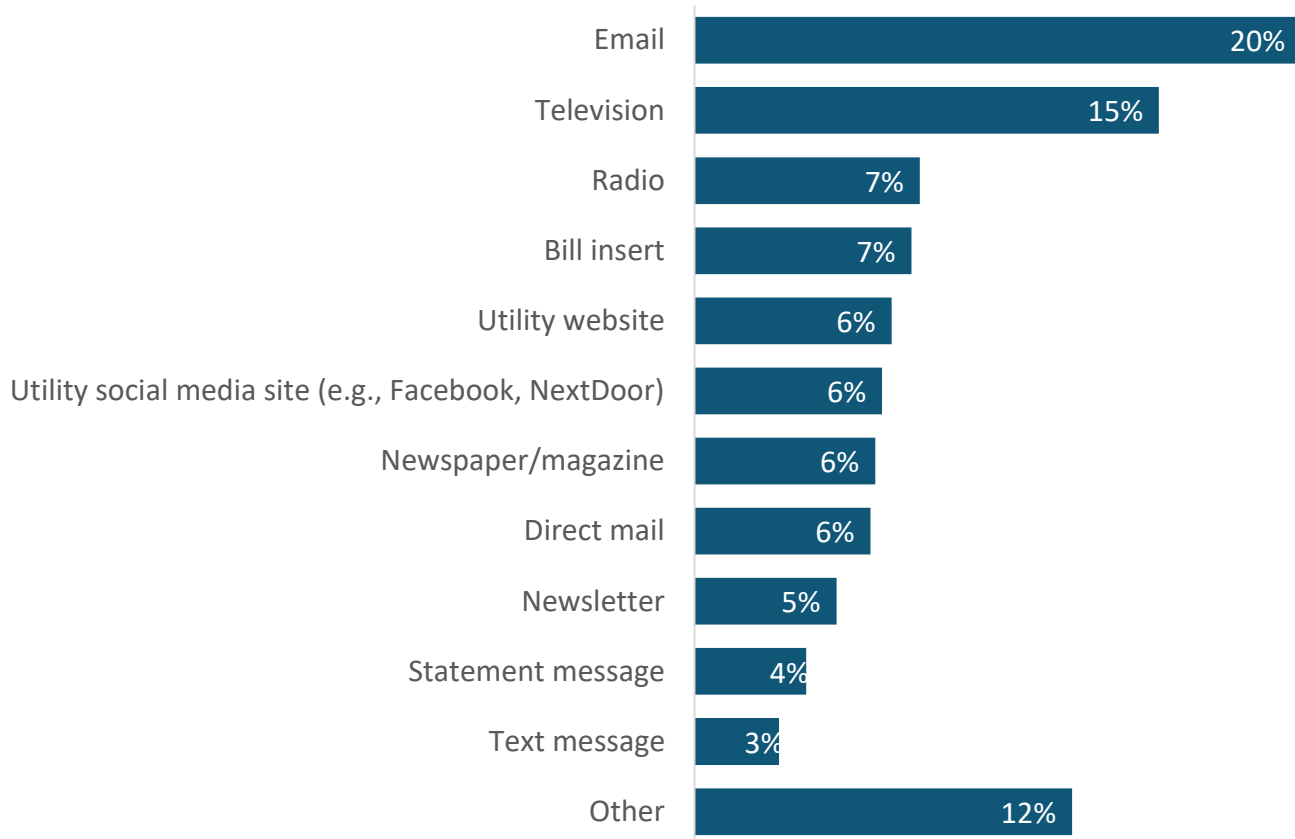
## Coronavirus Communication Channel Recall

Email and the mass media are the channels where most customers have heard about their utility's response to the coronavirus situation

Other channels include phone calls, blogs, in-person, brochures and billboards.

Percentages are based on the full sample of customers including the 51% of customers that have not heard anything about their utility's response to the coronavirus crisis.

## Where customers heard about coronavirus topics about their utility



## Channels of Communication

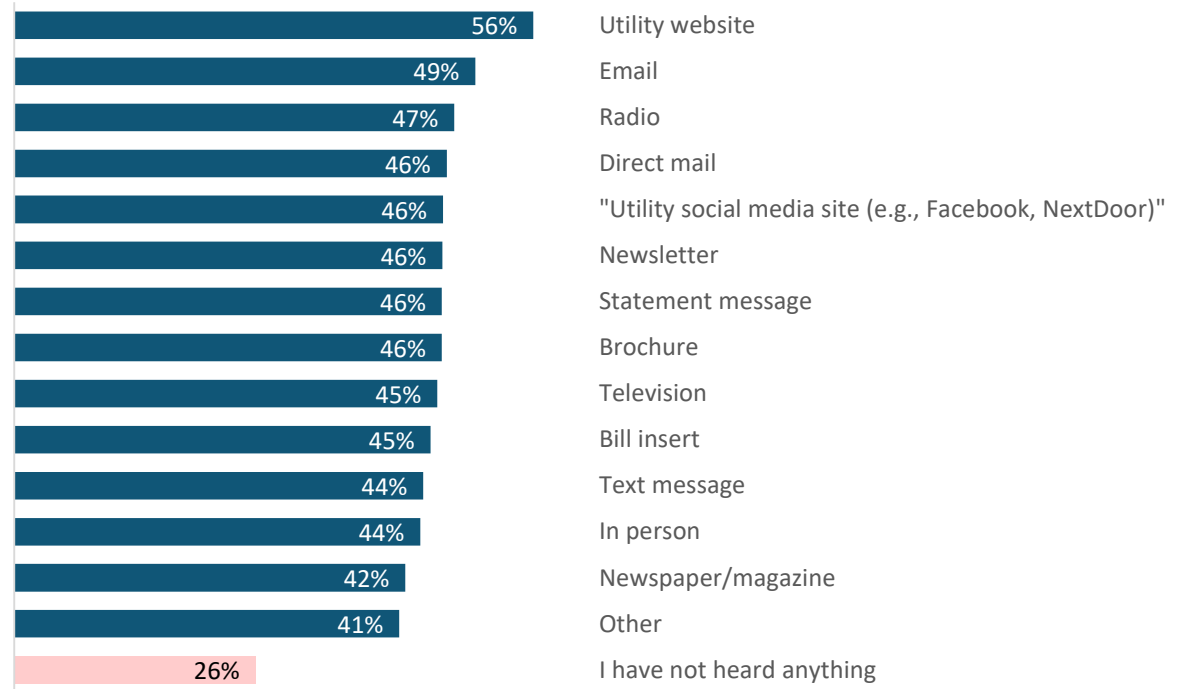
Communication via utility websites brings the highest perceptions on how well they are handling the crisis

All communications channels substantially lift perceptions of utility performance in handling the coronavirus situation.

Of the 51% of customers that have not heard anything, only 26% consider the utility's performance to be great, excellent or perfect.

## Overall, how would you rate your utility on their handling of the coronavirus situation – by channel of communication

% rating Great, Excellent, or Perfect (top 3 box)

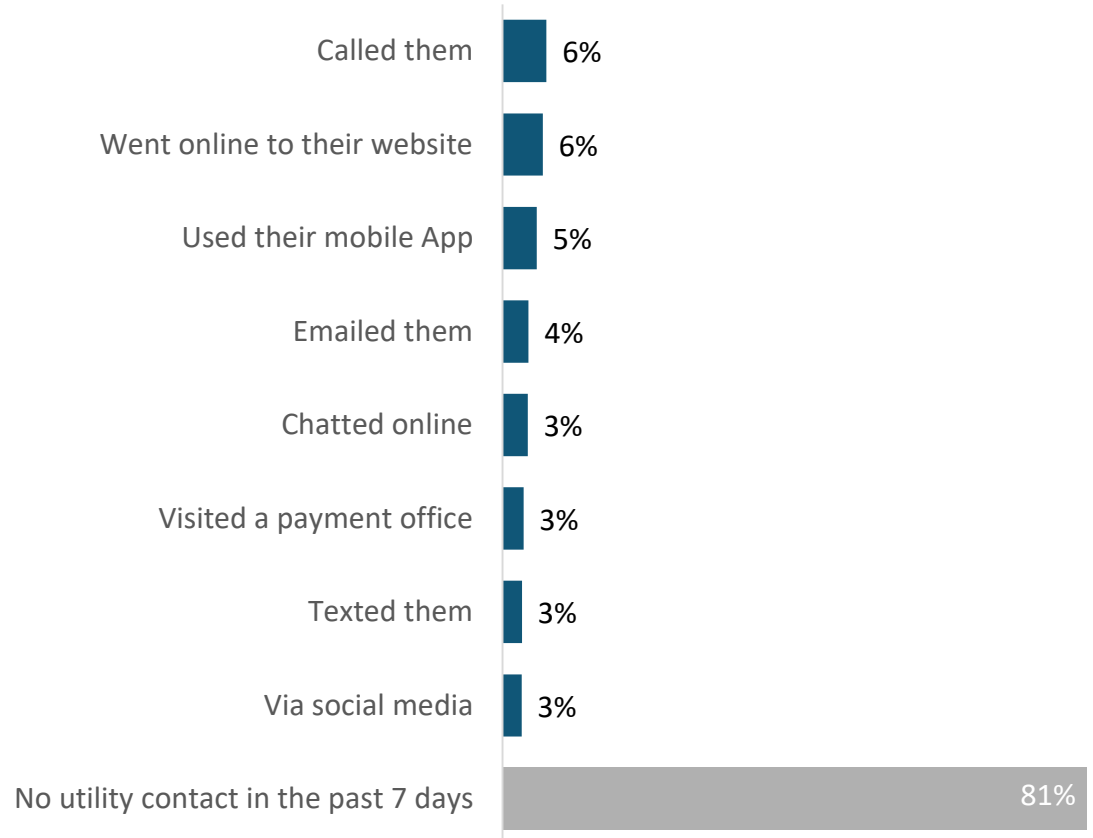


## Recent contact

Most customers have not contacted their utility in the last week

Most customers that made contact called, used the website or the app.

## Recent utility contacts by channel

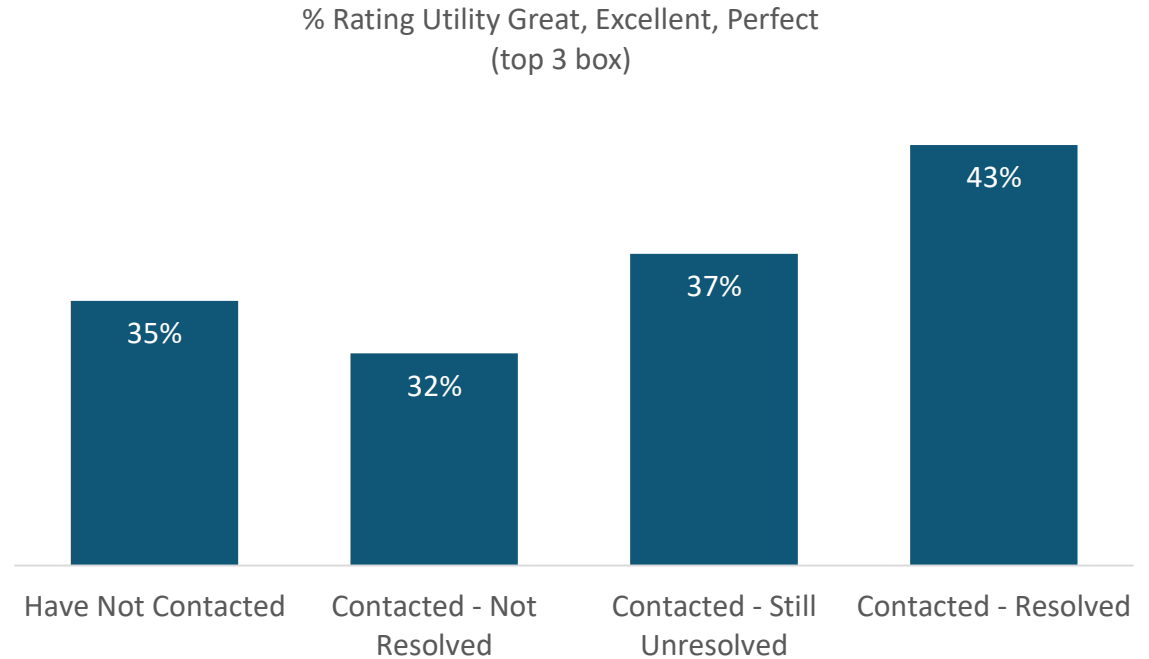


## Customer Care

Successful Customer Care experiences deliver the highest perceptions of utility's overall handling of the coronavirus situation

Poor Care performance degrades performance perceptions

## Overall, how would you rate your utility on their handling of the coronavirus situation – by customer care outcome



Have you contacted your utility for any reason in the past 7 days?

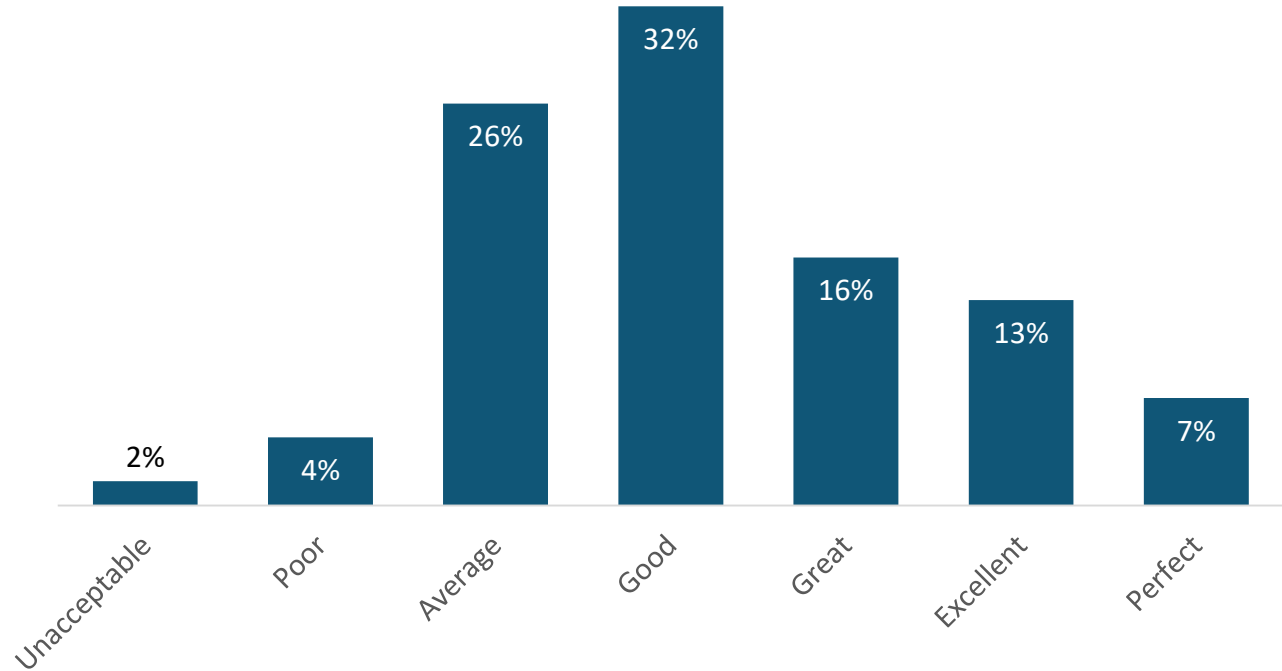
Was your question or problem resolved?

## Overall utility rating of the coronavirus situation

36% of customers rate their electric utility response to the coronavirus situation as either, great, excellent or perfect

Only 6% rate their utility's response as either poor or unacceptable.

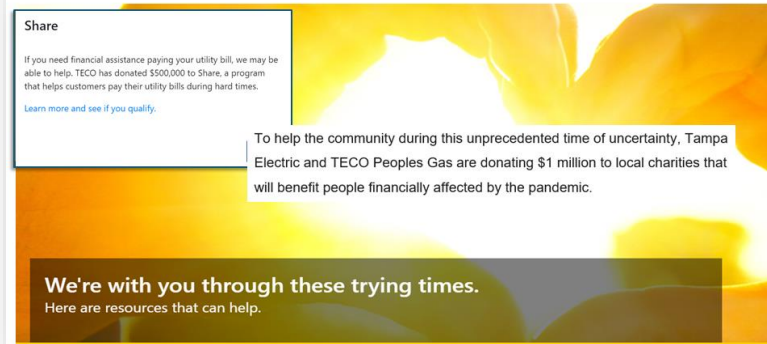
## Overall, how would you rate your utility on their handling of the coronavirus situation?



## Best Practices

Many utilities are rapidly adapting to the coronavirus situation.

Tampa Electric Website...Pop Up Box + Heart Banner and a Million Dollar Donation



**Share**

If you need financial assistance paying your utility bill, we may be able to help. TECO has donated \$500,000 to Share, a program that helps customers pay their utility bills during hard times.

[Learn more and see if you qualify.](#)

To help the community during this unprecedented time of uncertainty, Tampa Electric and TECO Peoples Gas are donating \$1 million to local charities that will benefit people financially affected by the pandemic.

**We're with you through these trying times.**  
Here are resources that can help.

DTE Website...Another Heart Banner



**We're committed to public safety and uninterrupted service.**

Our response to the COVID-19 virus >

Remember, energy usage will increase with more time at home

COVID-19 changed our lives overnight. Many are now working from home, off work, or have children attending school online, resulting in higher energy usage. We're here to help by providing quick energy efficiency tips to control usage and costs.

**J.D. POWER**



## Supporting Our Communities

At ComEd, we care about our communities. With customers potentially affected by COVID-19, ComEd is expanding awareness of its programs to help customers through temporary or extended financial hardship.



### Safety Updates during Coronavirus Pandemic

We are committed to keeping our customers informed of changes as we monitor Coronavirus (COVID-19) and its evolving impacts.

### Practice Social Distancing

We can all do our part to stop the spread of COVID-19 by practicing social distancing.

### Bill Payment Assistance

If you need help, we have programs and services available.

### Payment Arrangements

If you are having difficulty paying your utility bill, we may be able to help.

### Income Eligible

Find energy-saving offerings specially designed for income-eligible customers to easily improve home and building energy efficiency.



## Best Practices

Many utilities are rapidly adapting to the coronavirus situation.

A grid of six utility service cards for FPL. Each card features a small image, a title, a brief description, and a call-to-action button.

- View Letters to Customers:** Read the latest from FPL president and CEO to customers. [VIEW NOW](#)
- Get Help, Give Help:** View available resources to help with paying your bill. [SEE RESOURCES](#)
- Help your Neighbors:** Donate to Care to Share and help a family keep their lights on. [LEARN MORE](#)
- Protect Yourself:** Scams are on the rise. Learn how to spot a scammer. [LEARN MORE](#)
- Lower your Bill:** Get energy saving tips and tools that can help you lower your bill. [START SAVING](#)
- Get the FPL Mobile App:** Download now or text "App" to MYFPL (8575). [GET IT NOW](#)

Georgia Power Website...Comprehensive Plans to Continue Our Operations

At Georgia Power, our customers are at the heart of everything we do. Our promise to you is safe and reliable service during the COVID-19 pandemic.

As the coronavirus continues to spread, Georgia Power wants to assure our customers that we have comprehensive plans in place to continue our operations.

[Learn More](#)

As of March 14, 2020, Georgia Power has temporarily suspended residential disconnections for 30 days and will reevaluate the policy and time frame as the situation develops.



Aqua **AVOID CLOGS**

Aqua strongly recommends that you do not flush wipes or paper towels down the toilet. Even wipes marketed as being "flushable" don't break down and can cause backups in your household plumbing and problems in wastewater collection systems. These items are being used more than ever, and we ask that you please dispose in the trash instead of flushing. In addition, as there is likely an increase in home cooking, please remember to keep sinks and drains clear of fats, oils and grease. Thank you for your help as these actions will ensure our wastewater systems can effectively serve our customers.

## Questionnaire

1	Which area best describes where you live? (select one) Very large metro area (such as NY, Chicago, LA, DFW) Major city area (such as Denver, Seattle, Baltimore, or Las Vegas size) Large city (such as Indianapolis, Jacksonville, or Salt Lake City size) Midsize city (such as Syracuse, Des Moines, or Boise size) Small city (such as Bangor, Topeka, or Yuma size) Small town/rural (such as Kokomo, Ithaca, Great Falls, or Walla Walla) Don't know
2	What is your current work status (select one) Full-time: still going in to work Full-time: always worked from home Full-time: temporarily working from home Part-time: still going in to work Part-time: always worked from home Part-time: temporarily working from home Furloughed / Temporarily laid off Unemployed before March 1, 2020 Unemployed since March 1, 2020 Retired Student: in school Student: remote school
3	Who is your electric utility? <i>open ended response</i>
4	How would you rate your level of stress about the overall coronavirus situation? Extremely stressed Very stressed Moderately stressed Mildly stressed Not at all stressed
5	How prepared is your utility to continue to provide reliable power during the crisis? Extremely prepared Very prepared Somewhat prepared Somewhat unprepared Not at all prepared Don't Know
6	Have you experienced any electric service interruptions in the past 7 days? No Yes, a brief interruption (shorter than 5 minutes) Yes, a longer outage (more than 5 minutes)

7	Has your utility communicated about any of the following related to coronavirus actions? Not shutting off power for non-payment Providing flexible payment options Waiving late payment fees Website and mobile tools to help get things done Low-income/senior discounts Protect yourself against utility scams You can donate on your bill payment to assist others Utility has donated funds to support COVID 19 relief in their area You will still see our trucks out there maintaining the system Utility will still be reading meters Putting safety first for their employees and customers I have not heard anything
8	Where did you see or hear this/these communication(s)? Mark all that apply Television Radio Newspaper/Magazine Bill Insert Brochure Newsletter Direct mail Statement message Utility called Utility Website Email Utility blog Utility Social Media site Text message In-person Billboard Other Don't Know
9	Although your utility bill may include other services (gas, water, etc.), how much was your last electric bill? \$25 or less \$26 o \$50 \$51 to \$75 \$76 to \$100 \$101 to \$125 \$126 to \$150 \$151 to \$200 \$201 to \$250 \$251 or more
10	How much do you expect your electric bill amount to change this month compared to last month? (select one) I've cut back a lot on electricity use (at least 10% less) I'm using somewhat less electricity (about 1%-9% less) No change I'm using somewhat more electricity (about 1%-9% more) I'm using a lot more electricity (at least 10% more)

11	How likely are you to be able to pay your utility bill next month? Very likely Unsure Very unlikely
12	Have you contacted your utility for any reason in the past 7 days? Called them Went online to their website Used their mobile App Visited a payment office Texted them Emailed them Chatted online Posted them on social media No Utility Contact past 7 days
13	Was your question or problem resolved? Yes No Still an open issue
14	Overall, how would you rate your utility on their overall handling of the coronavirus situation? Unacceptable Poor Average Good Great Excellent Perfect
15	Compared to before the coronavirus started, do you expect your financial situation in two months? Much worse Somewhat worse No change Somewhat better Much better Prefer not to answer