Customer Satisfaction Survey
September 2000

Customer Research

Third Quarter 2000 Results

Customer Satisfaction Index

	Index Proportion	Residential Satisfaction Level	Commercial Satisfaction Level	Index Subtotal	Percentage of customers who use the service
Call Centre Service	40%	9.0	8.1	3.6	18.8%
Field Service	20%	9.3	9.5	1.9	8.3%
Cashier Service	20%	9.4	9.4	1.9	22.3%
General Satisfaction	20%	8.6	8.7	1.7	
	Customer Satisfaction Index:			9.0	
In-office Service				7.4	1.2%

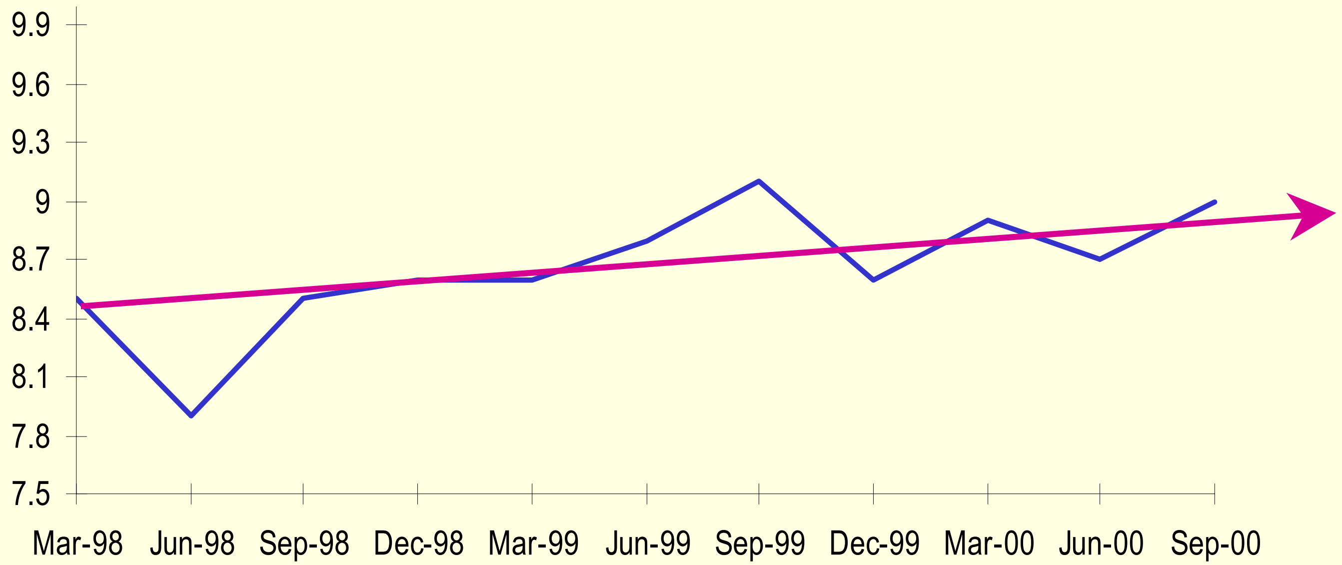
Notes:

1. Residential customers account for 90% of total customers.
2. The index has been calculated using results taken from the Customer Satisfaction research collected and analyzed in September 2000.
3. Satisfaction levels for the Call Centre, Field, and Cashier Services are for customers who availed of these services within the last six months.
4. The satisfaction levels are based on a scale of 1 to 10 where 1 is 'Not at all satisfied' and 10 is 'Extremely Satisfied'.

Customer Satisfaction Index

The index this quarter is similar to that recorded in September 1999 but higher than September 1998.

Using a red trend line, the slight but steady increase in the index can be observed.

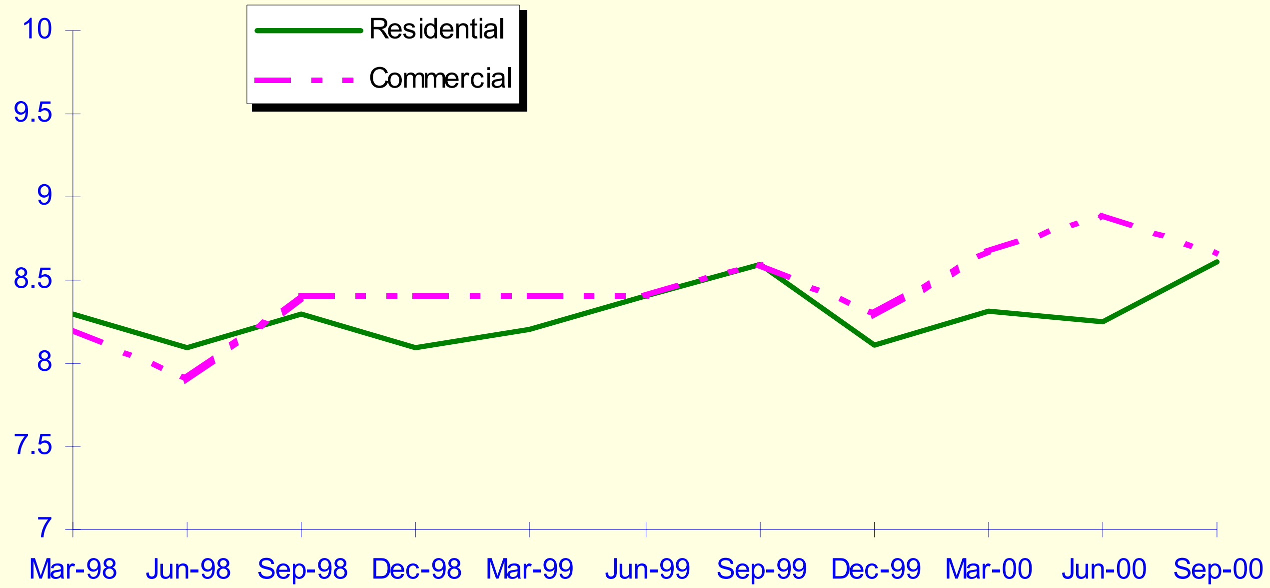


Average response out of 10

Overall Rating of Service

Satisfaction with Overall Service

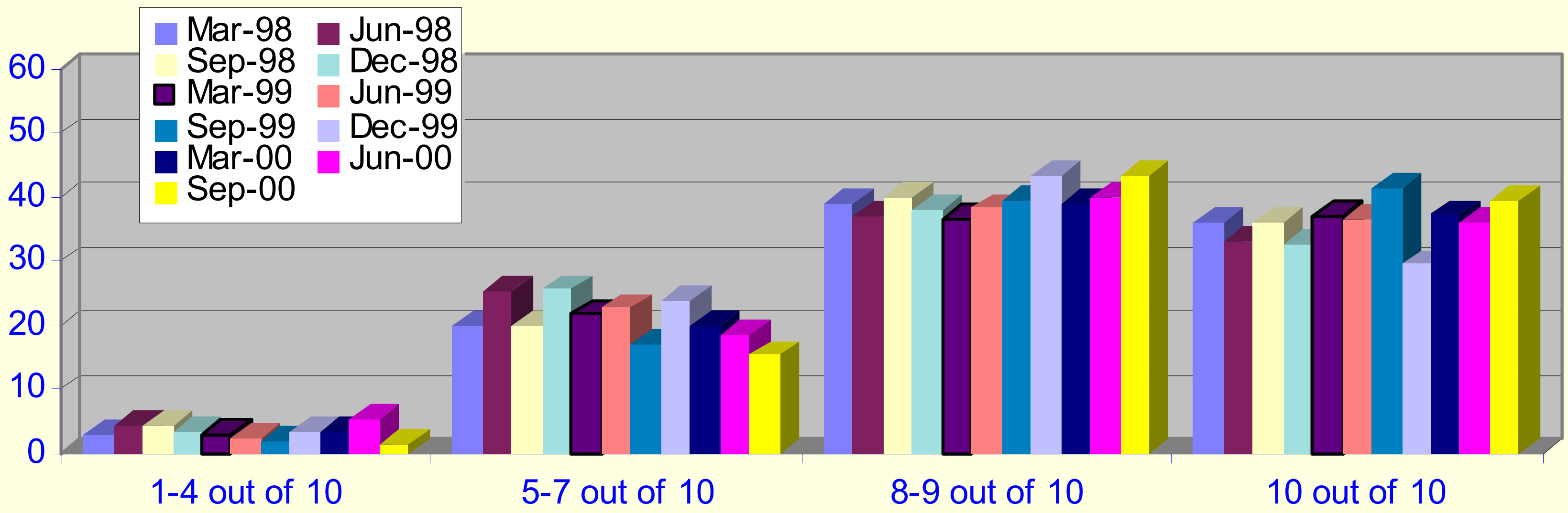
- Satisfaction with overall service for commercial and residential customers is similar to that recorded in September 1999.
- Data for the past two years shows a very stable trend in customers’ opinions of our overall service.



Average response out of 10

Satisfaction with Overall Service

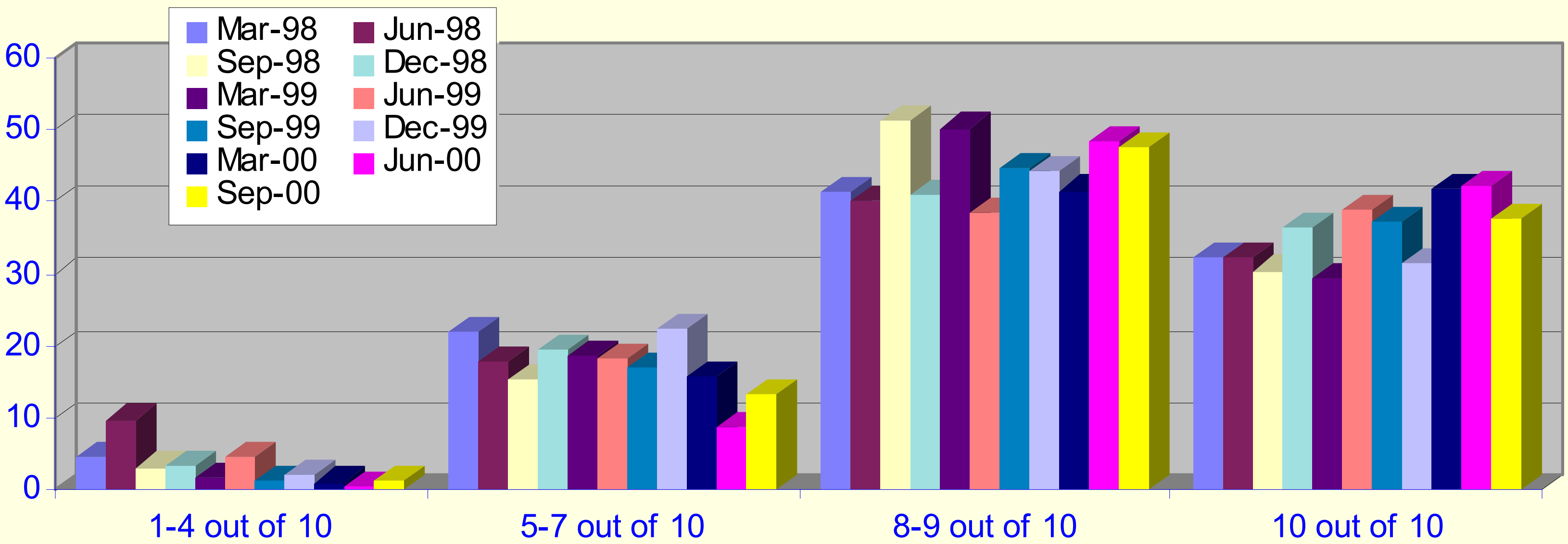
Residential Customers



- The percentage of residential customers who ranked our service ten out of ten is 39.7%; compared to 36% last quarter and 41% recorded in September 1999.
- Only 1.3% of residential customers ranked our service between one and four.
- During 2000, the percentage of customers who ranked our service as 5 to 7 out of 10 has declined while the percentage of customers who ranked our service as 8 or 9 out of 10 has increased.

Satisfaction with Overall Service

Commercial Customers



- This quarter, 38% of commercial customers ranked our service as ten out of ten, less than last quarter but consistent with that recorded in September 1999.
- The percentage of commercial customers that ranked our service as one to four out of ten remains very low.

Telephone Service

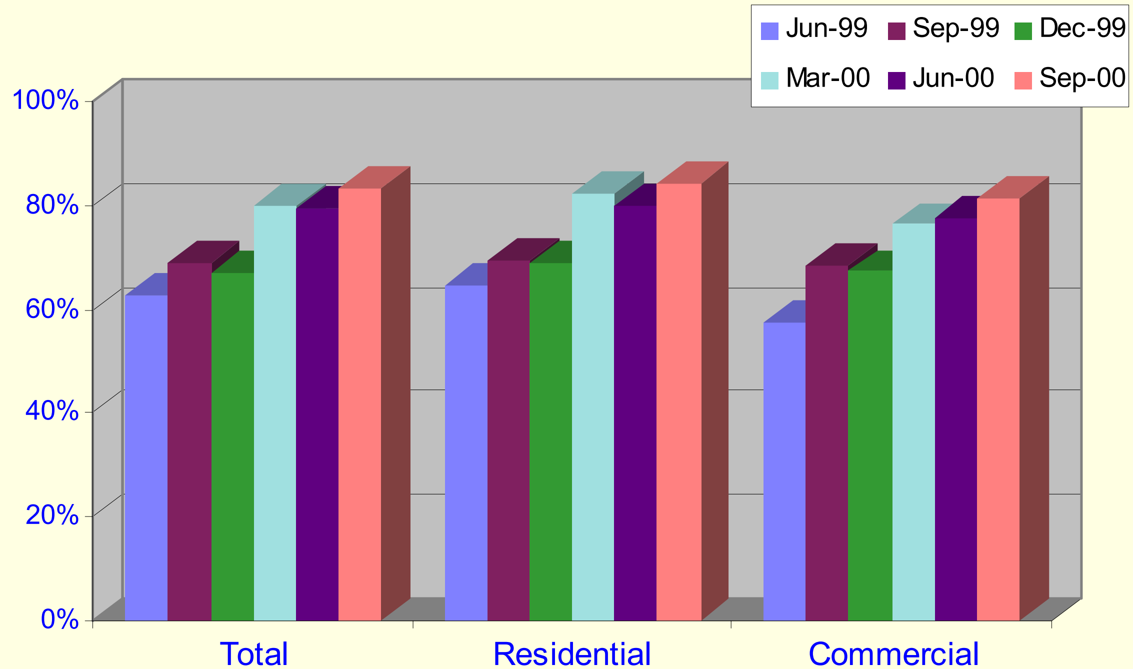
Main Reason for Calling

	Residential	Commercial	Total
Power Interruption	21.2%	46.7%	28.9%
Service Connection	16.7%	18.3%	18.0%
Balance on Account	22.0%	6.3%	17.5%
Moving Locations	9.8%	11.7%	10.3%
Payment Arrangements	10.6%	1.7%	7.7%

- Top five responses are shown.
- 18% of our residential and 19% of our commercial customers indicated they had called us in the past six months.
- 62% of customers indicated they had called the customer service telephone number, 19% had called the trouble/emergency number and 19% had called one of the local offices.

Percentage of Inquiries Resolved on the First Call

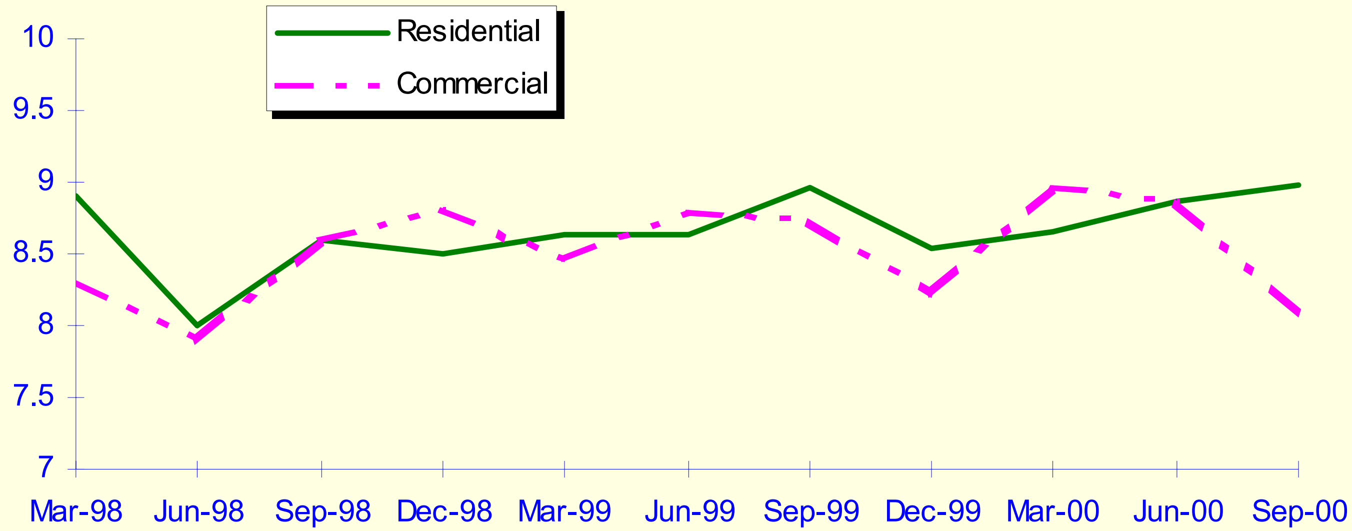
- 83% of customers indicated their inquiry was handled on the first call; up from 80% recorded last quarter.
- 31% of the customers who called more than once, or 8.5% of all callers, indicated they had called about the same issue twice.
- 28% of callers who called more than once indicated they called three times about the same issue and 33% called more than three times to have their issue resolved.
- The type of inquiry had no significant effect on whether or not the inquiry was handled on the first call.



Percentage of customers who called only once.

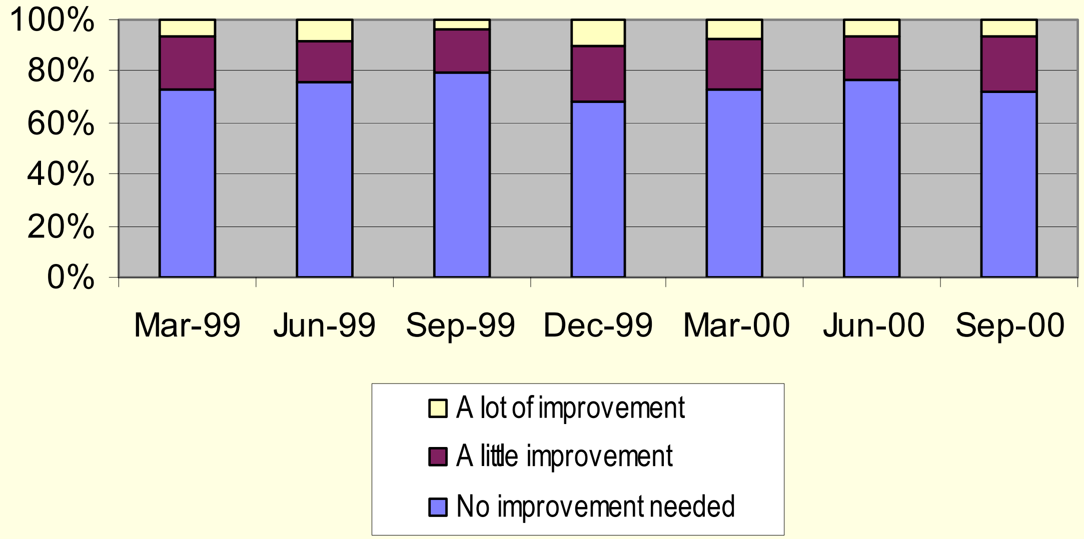
Satisfaction with Telephone Service

- Residential customers' ranking of the quality of our telephone service remained fairly consistent with that recorded in September 1999. Commercial customers ranked the telephone service slightly lower than last quarter and last year.

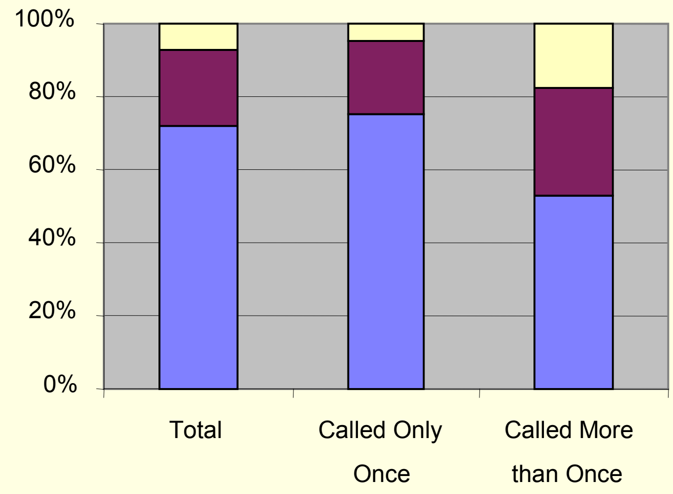


- As in past quarters, customers who have phoned us more than once for a particular issue rate our telephone service lower than customers whose inquiry was resolved on the first call. Customers who called only once ranked our telephone service as 8.8 out of 10. Customers who called more than once ranked the service at 8.0 out of 10.
- There was no difference in the quality of service rating given by customers who called the customer service line, those who called the trouble line and those who called the local offices.
- There were no demographic or regional differences noted which significantly affected the rating of quality of phone service.

Improvements in Telephone Service

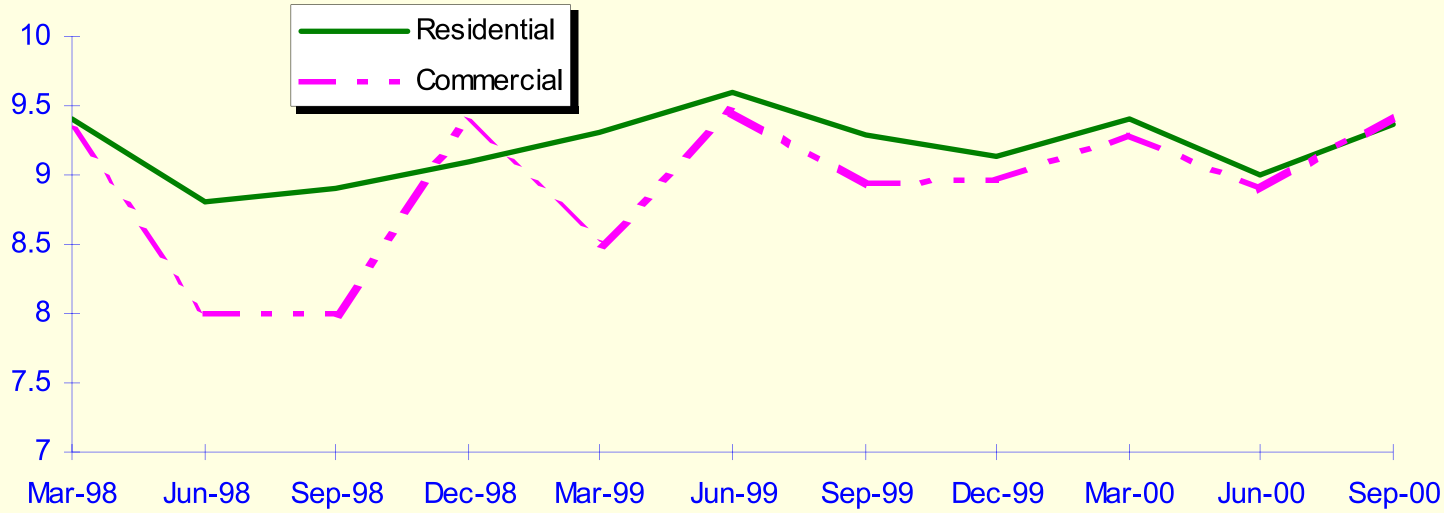


- The percentage of customers who feel we can improve our phone service remains fairly consistent with past quarters.
- In total, 72% of customers believe we need no improvement in the quality of our telephone service, 21% of customers think we can improve our telephone service a little and 7% think we can improve it a lot.
- 21% of commercial customers believe we can improve our telephone service a little and 14% believe we can improve our telephone service a lot. This compares to 21% and 3% respectively for residential customers.
- The particular telephone line the customer called and the type of inquiry had no significant effect on the percentage of customers who thought we could improve our telephone service.
- 4% of customers who only called once about a particular issue thought we could improve service a lot as compared to 17% of customers who called more than once.



Cashier Services

Satisfaction with Cashier Services

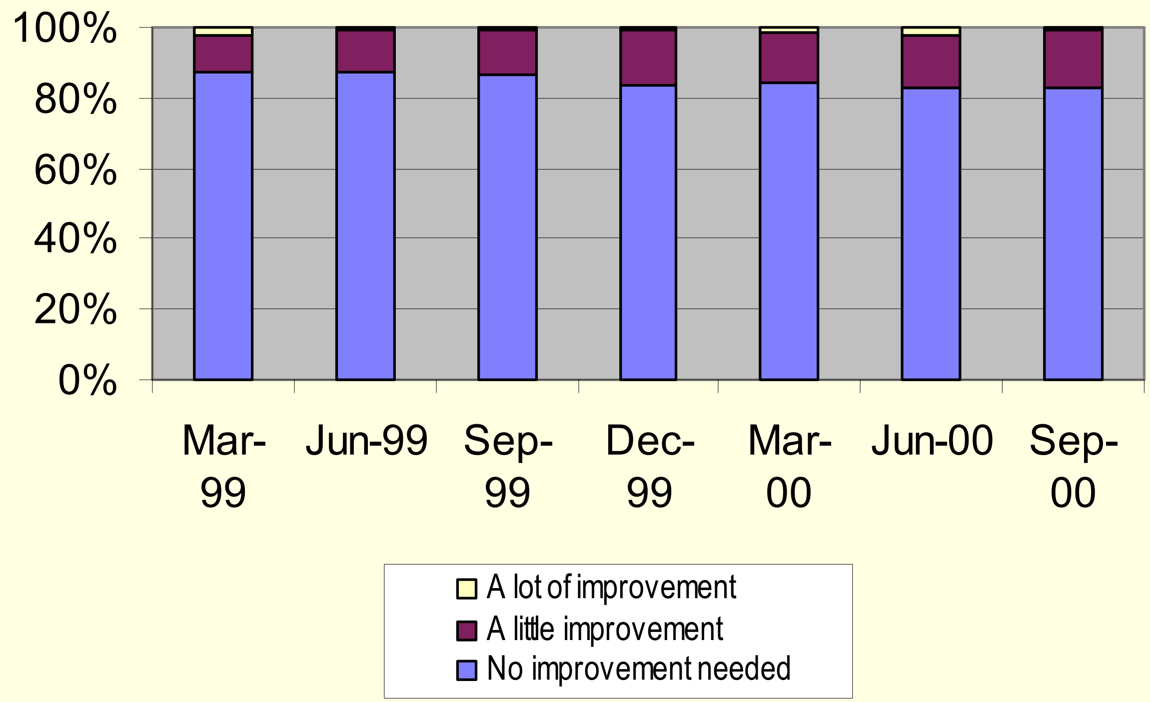


Average response out of 10

- 25% of residential customers and 17% of commercial customers indicated they had used our cash services in the past six months.
- Despite some variability in the quality of service rating, rating of our cash services continues to hover around 9 to 9.5.

Improvement of Cashier Service

- The percentage of customers who feel we need to improve our cashier service has not changed significantly since March 1999.
- Currently, 16% of all customers believe we can improve a little and only 1.5% believe we need to improve a lot.
- 83% of commercial customers and 82% of residential customers believe our cashier service needs no improvement.
- The most common suggestion for improvement was to have more cashiers available during peak times.



In-Office Service

Reason for Visit

- This quarter, 1% of our residential and commercial customers indicated they have visited one of our offices for service (other than cashier services) in the past few months.

- The main types of service customers request in-person at the local offices were:

  - Make payment arrangements (36.4%)
  - Inquiry about a balance owing on account (27.3%)
  - Inquire on energy consumption or high bill (18.2%)

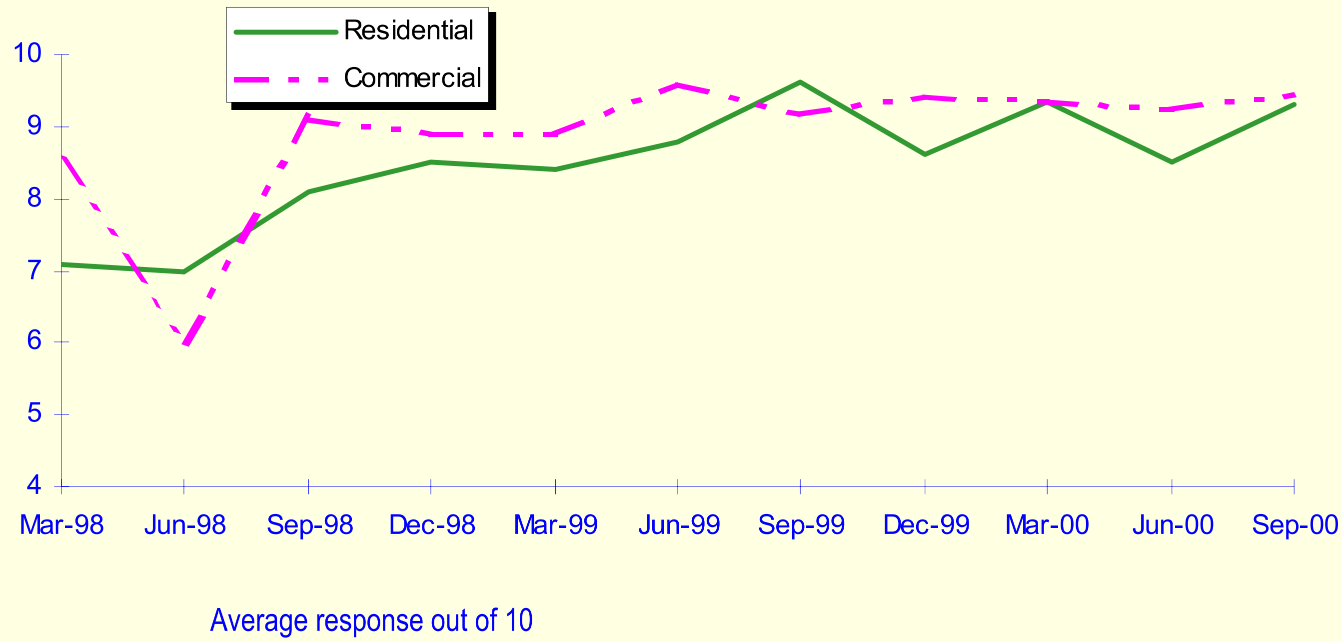
- Customers who have visited our office for service over the past few months rated the quality of service as 7.4 out of 10.

- There is insufficient numbers to analyze the data further.

Field Services

Satisfaction with Field Service

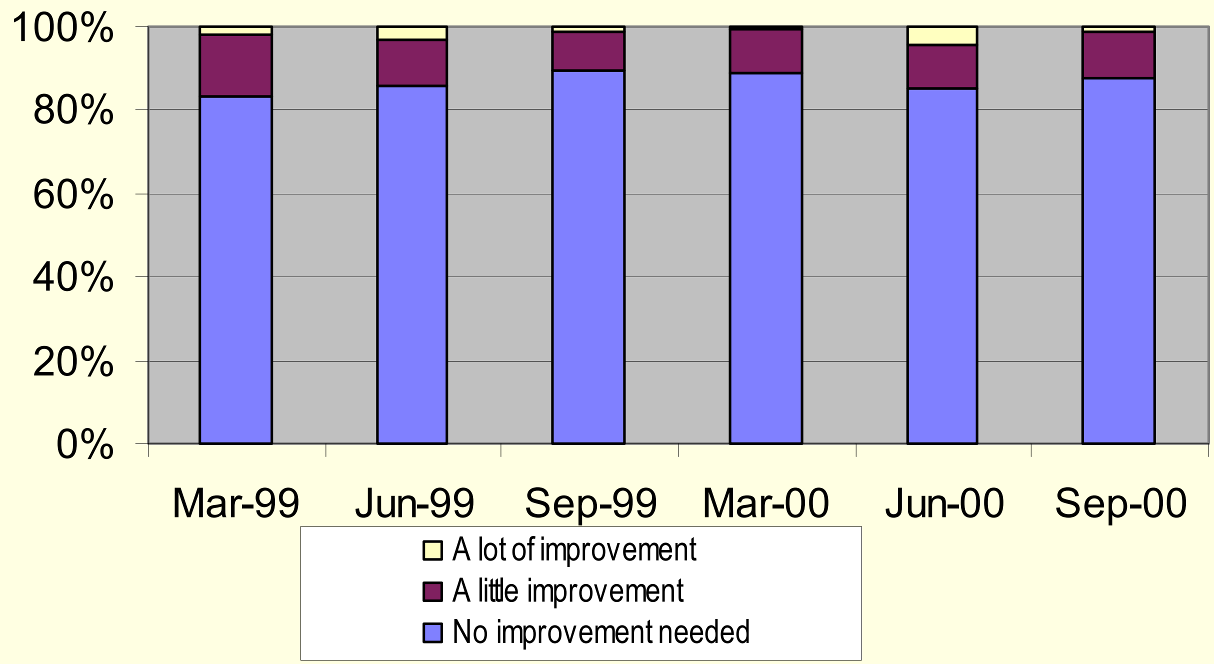
- 30% of the customers indicated they had received some form of field service in the past six months. Correcting for meter readers who did not have contact with customers, the percentage of actual field contacts was 8%.
- The quality of service rating given for our field services has remained fairly stable over the past year.
- There were no significant differences in the rating of service given for the various types of field services.



- No demographic or regional differences were noted that significantly affected the rating of quality of service.
- When asked why they had given this rating most customers commented on the staff being friendly and courteous, the service was completed promptly or they had no problems or issues with the service provided.

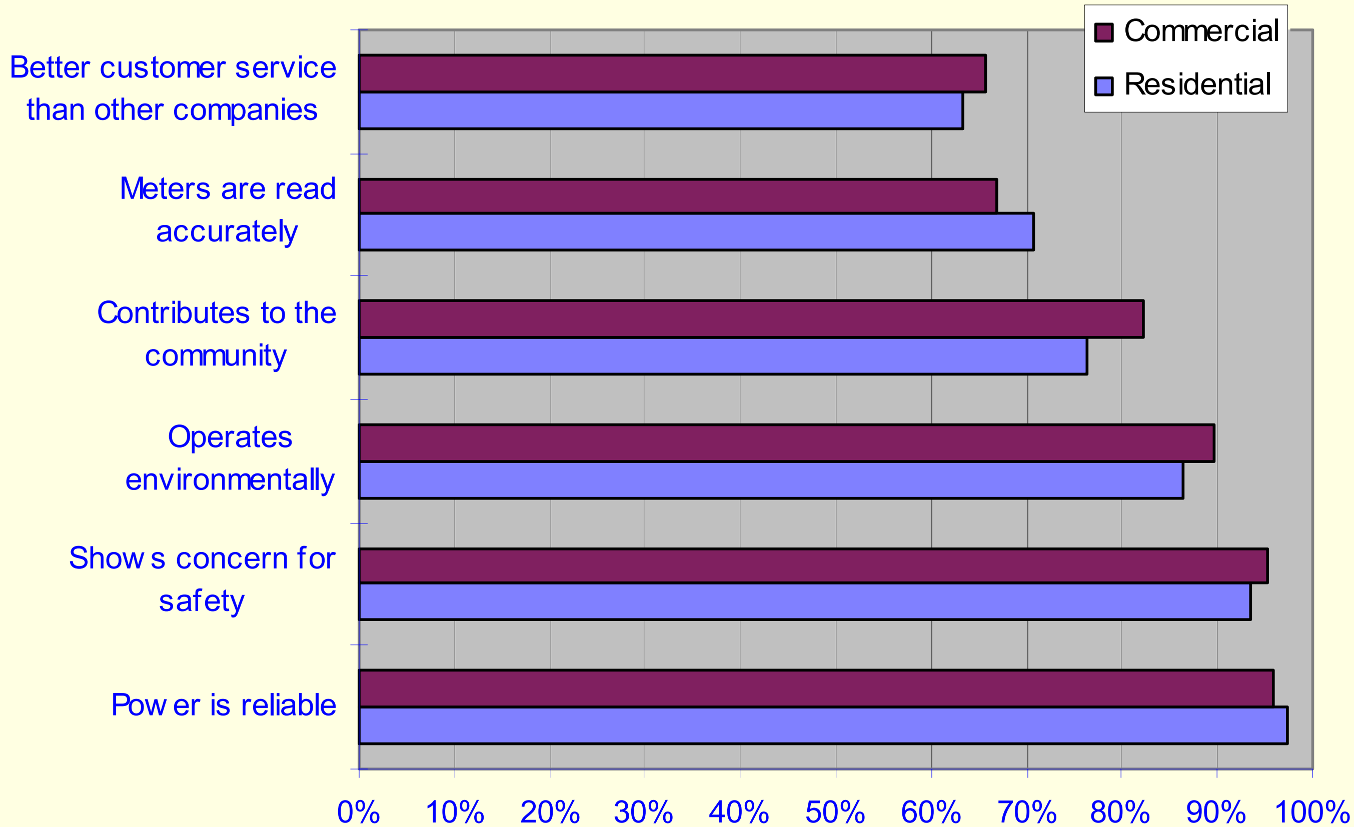
Improvement in Field Service

- This quarter, 11% of customers thought we could improve our field services a little and only 1% thought we could improve our field services a lot.
- The percentage of customers who feel we need to improve our field services is fairly consistent with that recorded over the past two years.
- No demographic or regional differences were noted that significantly affected the percentage of customers who feel the quality of our field services could improve.



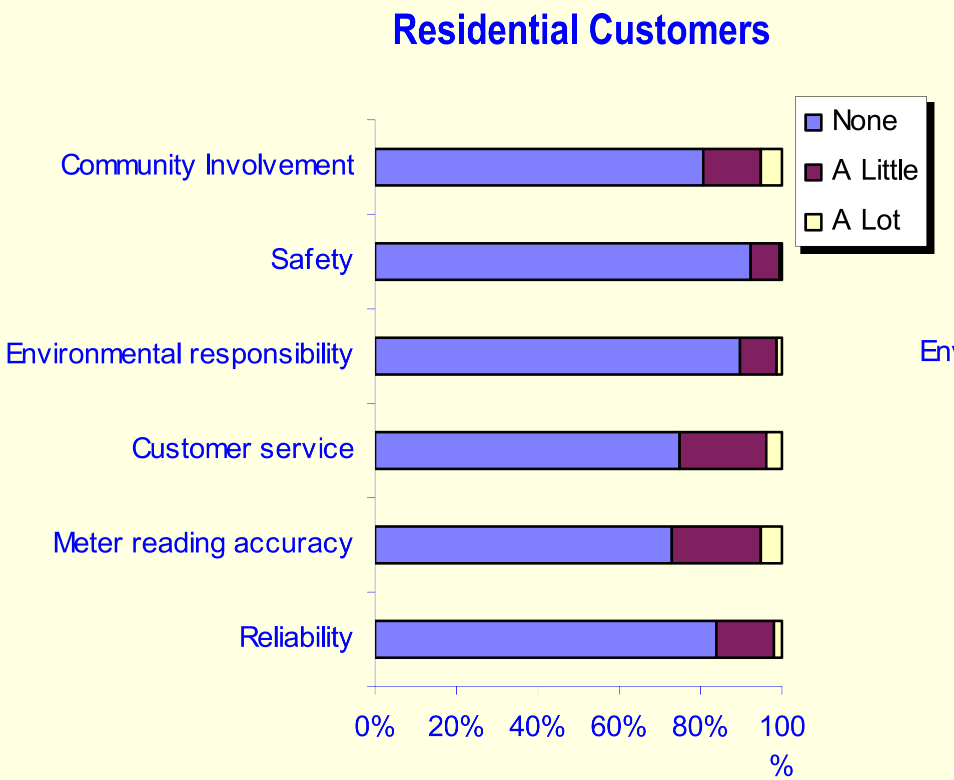
Ranking of Service Attributes

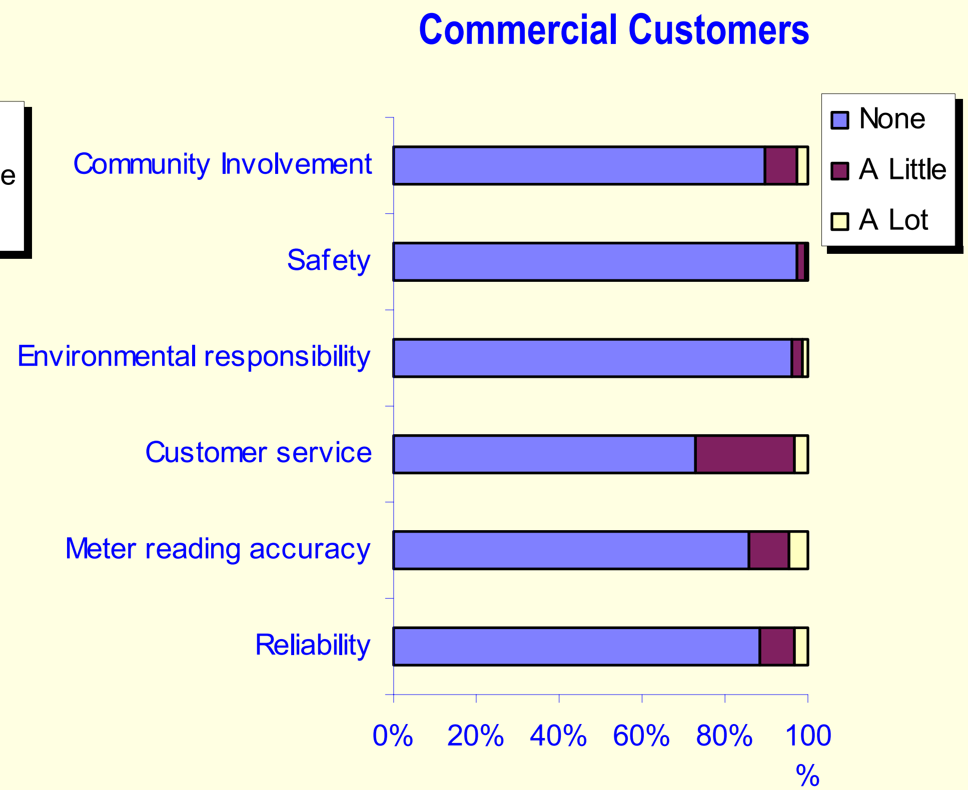
How Well We are Doing



- The graph represents the percentage of customers who either strongly agree or somewhat agree with the statement.

How We Can Improve

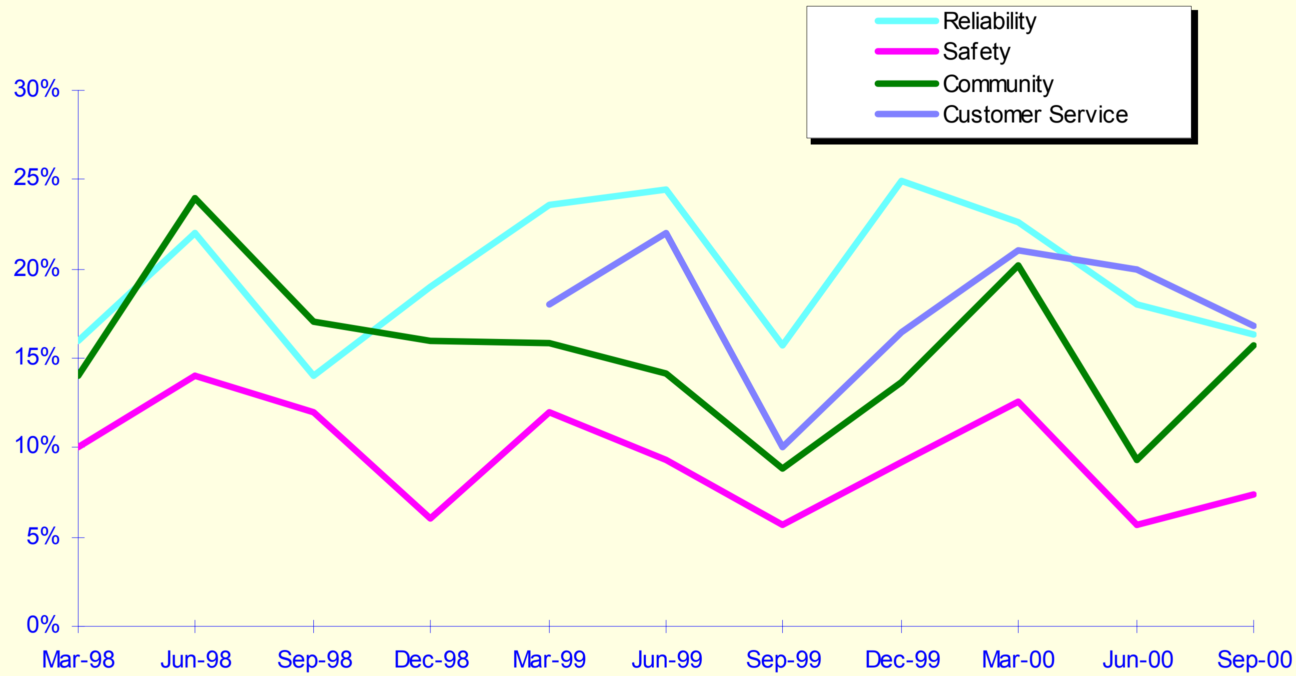




- This quarter, no demographic or regional differences were noted that significantly affected the percentage of customers who feel we could improve in these areas.
- Customers' expectations for improvement are highest for customer service and meter reading accuracy.
- Except for customer service, residential customers believe there is more room for improvement in these areas than commercial customers.

Change in Residential Customers' Perceptions

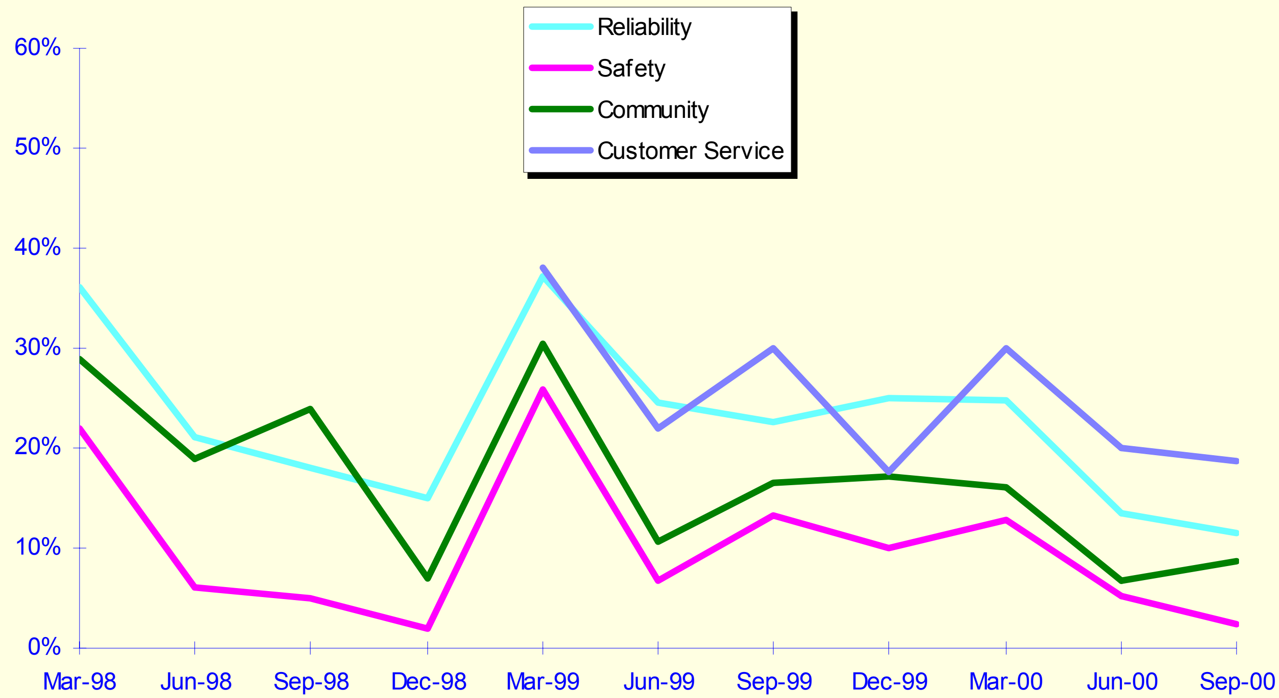
- The percentage of customers who believe we can improve reliability a little or a lot is 16% this quarter as compared to 16% in September of 1999 and 18% last quarter.
- The percentage of customers who feel we can improve on our concern for public safety a little or a lot is 7%; similar to last quarter and September last year.
- The percentage of customers who believe we can improve our community contribution increased from 9% last quarter and 9% in September 1999 to 16% this quarter.
- The percentage of customers who believe we can improve our customer service is 17%; less than last quarter but higher than the 10% recorded in September 1999.



Percentage of customers who believe we can improve the service either a little or a lot.

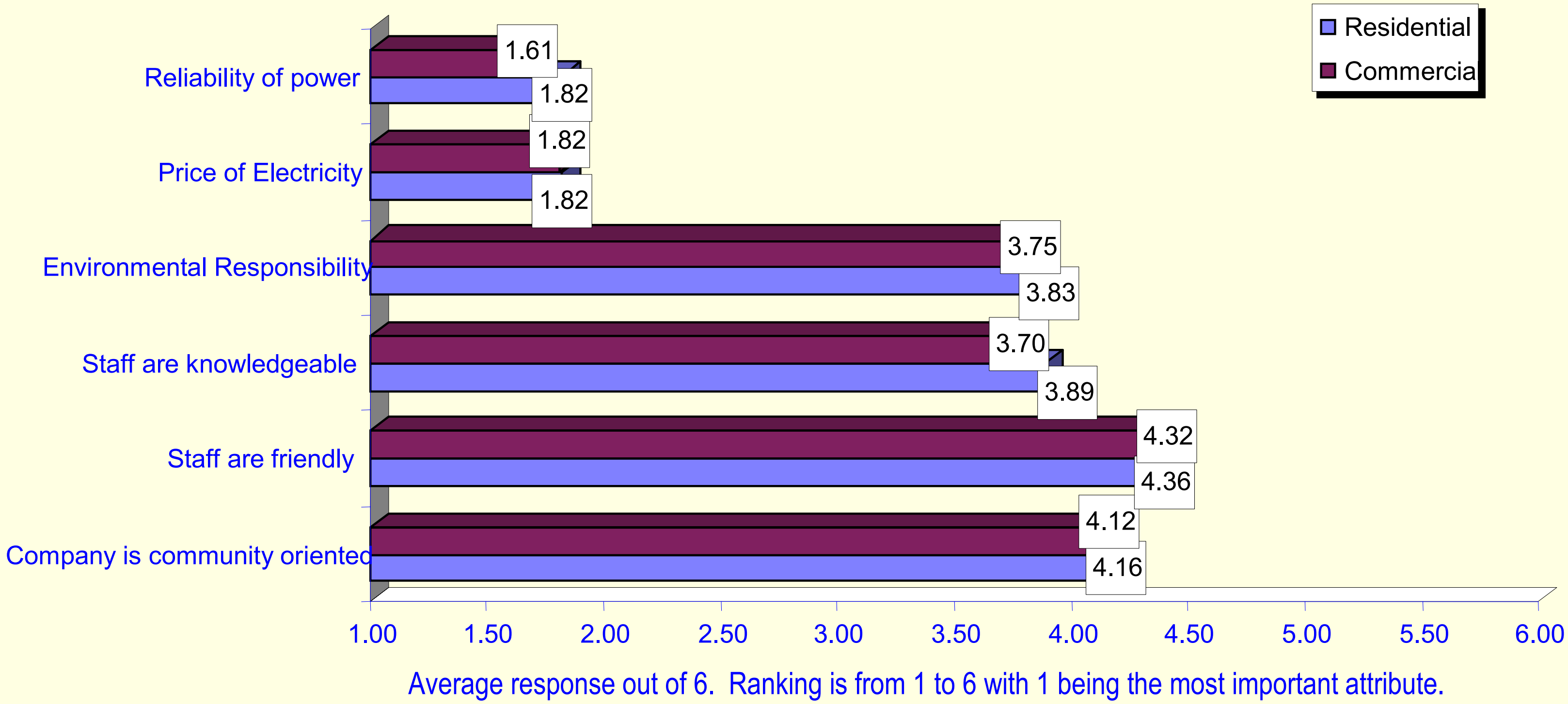
Change in Commercial Customers' Perceptions

- The percentage of commercial customers who believe we can improve our reliability of supply is 12% this quarter compared to 23% in September 1999 and 13% last quarter.
- The percentage of commercial customers who believe we can improve our safety concern is 2% this quarter compared to 13% in September 1999 and 5% last quarter.
- The percentage of commercial customers who believe we can improve our community contribution is 9% this quarter compared to 17% in September 1999 and 7% last quarter.
- 19% of commercial customers believe we can improve our customer service. Down from 30% in September 1999.



Percentage of customers who believe we can improve the service either a little or a lot.

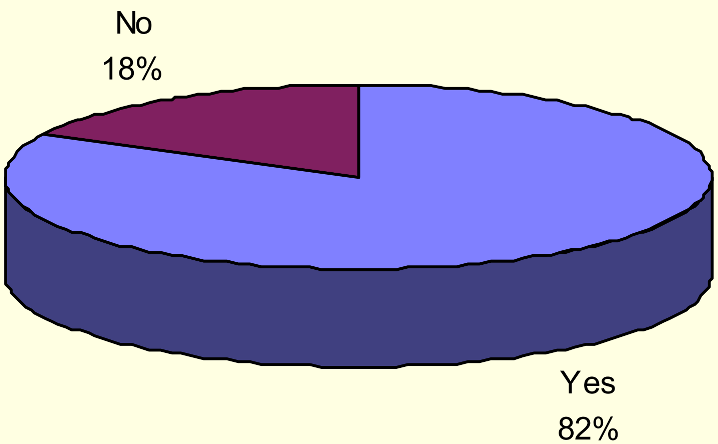
Ranking of Importance



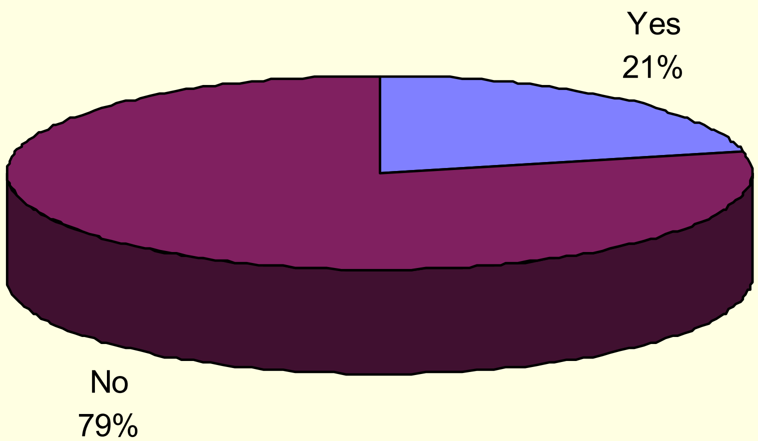
- Reliability was ranked by commercial customers as the most important aspect of our service. Price is ranked second in importance.
- Residential customers ranked price and reliability equally important.
- Reliability continues to be ranked higher in importance by commercial customers than by residential customers.

Equal Payment Plan

Awareness

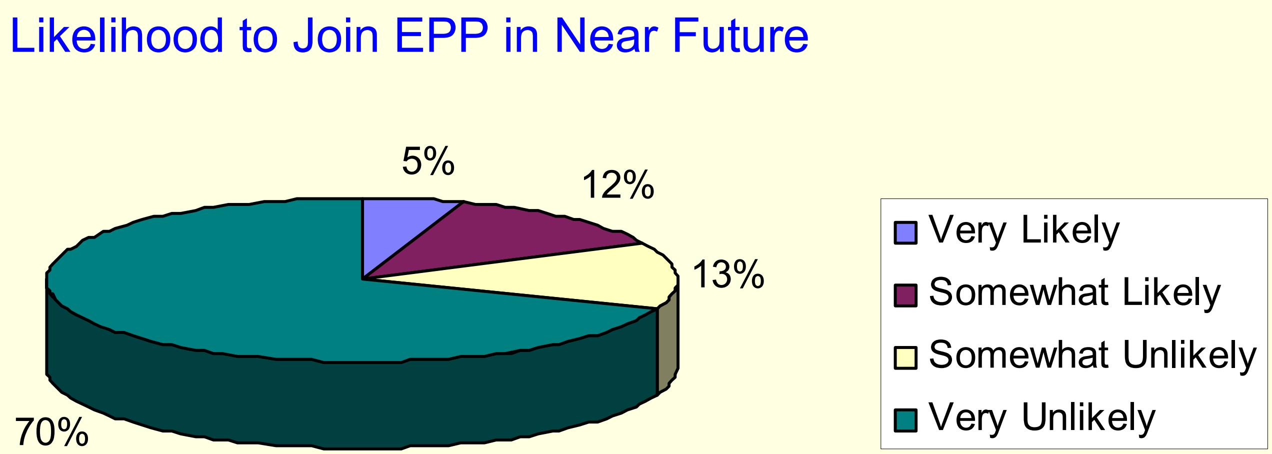


Participation



- Awareness of the Equal Payment Plan has increased since June 1998 when only 64% of respondents were aware of EPP.
- Awareness of EPP was lower in Avalon Region (68%) than in other regions.
- Awareness was lower than average for respondents who were less than 34 years of age (78%) and those who are over 65 years of age (72%)
- The percentage of customers who said they participate in EPP increased from 19.8% in June 1998 to 21%.
- There were no demographic differences which significantly affected the participation rate.

Potential EPP Customers



- 5% of the current non-subscribers indicated they were very likely to join EPP in the near future. A further 12% were somewhat likely.
- The potential for EPP customers was highest in Corner Brook (12.5%) and lowest in St. John's (2.9%) and Stephenville (2.6%).
- There were no other demographical differences that significantly impacted interest in joining EPP.
- The main reasons stated for not wanting to join EPP were: "Just not interested", "Satisfied with current method", "Wants to pay for actual usage each month" and "Wants lower bills in the summer".

EPP Promotion

- Customers who were very or somewhat likely to join EPP wanted to learn more about the program through newspaper advertising or bill inserts. However, regional differences are noted.
- Interest in newspaper advertising was higher than average in St. John’s (69.5%) and Burin (65.1%) and lower than average in Clarenville (38.2%), Gander (34.8%), Grand Falls (27.5%) and Corner Brook (33.8%).
- Interest in bill inserts was higher than average in Clarenville (42%), Gander (39%), Grand Falls (53.6%), and Corner Brook (53.2%) and lower than average in St. John’s (29.3%) and Burin (27.9%).
- Interest in having a Customer Representative call them at home was higher than average in Clarenville (20%), Gander (24.6%) and Grand Falls (19%) and lower than average in St. John’s (1%) and Burin (2.3%).