

WBMLP



2021 Residential & Commercial Survey



Report of Findings

7 May 2021
Confidential & Proprietary

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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.



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Project Overview

- GreatBlue Research was commissioned by West Boylston Municipal Light Plant (hereinafter "West Boylston" or "WBMLP") to conduct market research to gain insight into the satisfaction levels of residential and commercial customers serviced by the utility.
- The primary goals for this research study were to assess satisfaction levels of WBMLP customers and highlight attitudes and awareness regarding various electric utility-related characteristics.
- In order to service these research goals, GreatBlue employed telephone and digital survey methodologies to capture the opinions of residential and commercial customers living in West Boylston's service territory.
- The outcome of this research will enable West Boylston to a) more clearly understand, and ultimately set, customer expectations, b) act on near-term opportunities for improvement and, c) create a strategic roadmap to increase customer satisfaction.



Areas of Investigation

The West Boylston Municipal Light Plant leveraged a quantitative research methodology to address the following areas of investigation:

- Rating local utility organizations
- Rating WBMLP's organizational characteristics
- Rating WBMLP's customer service personnel
- Gauging interest and likelihood to participate in renewable energy initiatives
- Gauging current and future plans for electric vehicles and electric heat pump technology
- Demographic profiles of respondents

Research Methodology Snapshot - Residential

Methodology Telephone & Online	No. of Completes 268	No. of Questions 45*	Incentive None	Sample Customer List
Target Residential	Quality Assurance Dual-level**	Margin of Error 5.9%	Confidence Level 95%	Research Dates March 19 - April 1, 2021

* This represents the total possible number of questions; not all respondents will answer all questions based on skip patterns and other instrument bias.

** Supervisory personnel, in addition to computer-aided interviewing platform, ensure the integrity of the data is accurate.

Research Methodology Snapshot - Commercial

Methodology Telephone & Online	No. of Completes 26	No. of Questions 45*	Incentive None	Sample Customer List
Target Commercial	Quality Assurance Dual-level**	Margin of Error 18.2%	Confidence Level 95%	Research Dates March 19 - April 12, 2021

* This represents the total possible number of questions; not all respondents will answer all questions based on skip patterns and other instrument bias.

** Supervisory personnel, in addition to computer-aided interviewing platform, ensure the integrity of the data is accurate.

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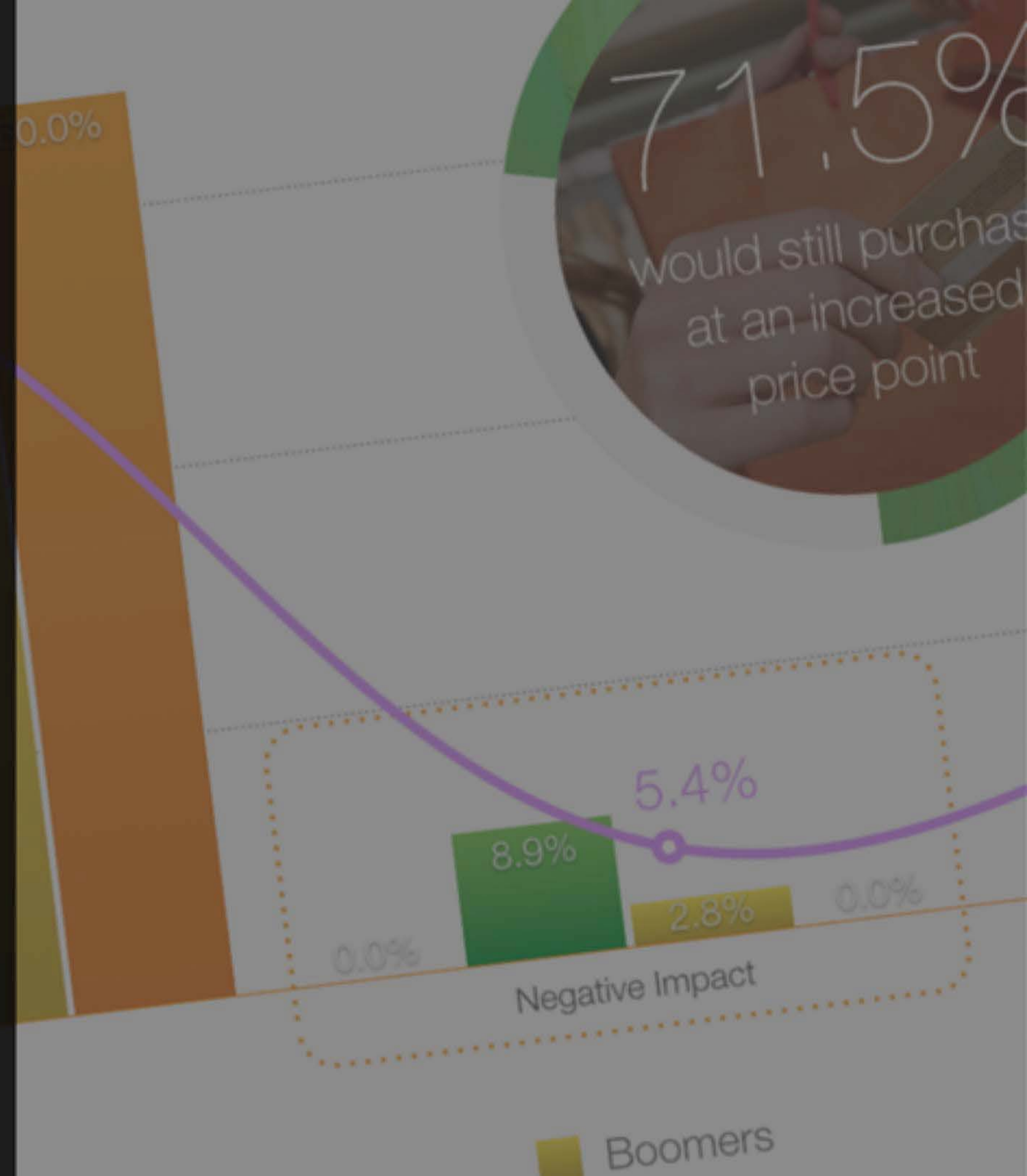
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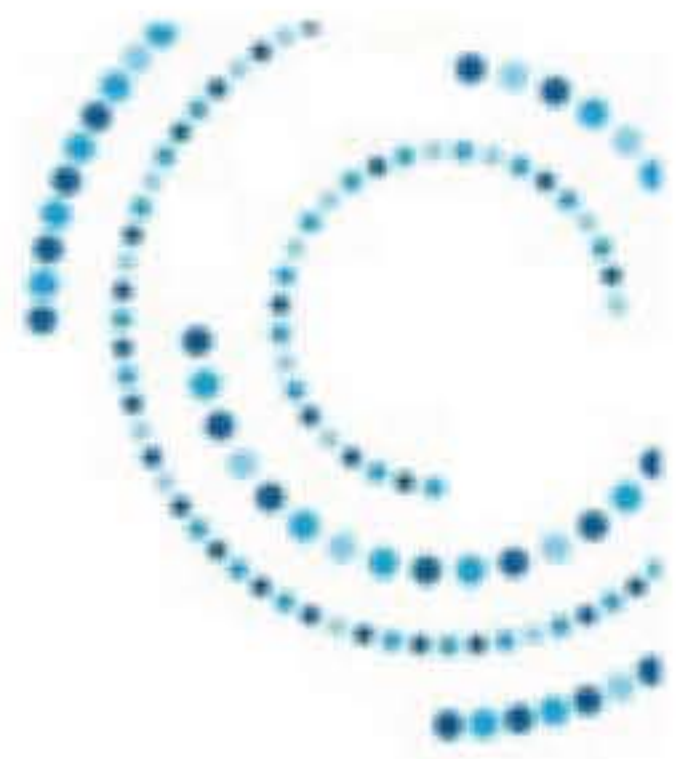
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Key Study Findings - *Noted interest in energy conservation*



What we learned:

2021 survey results showed a marked frequency of surveyed customers who reported they would like more communication and education from WBLP regarding energy conservation tips. Further, although ratings for "helping customers conserve electricity" were above 80.0%, they were lowest of the six (6) company characteristics measured.

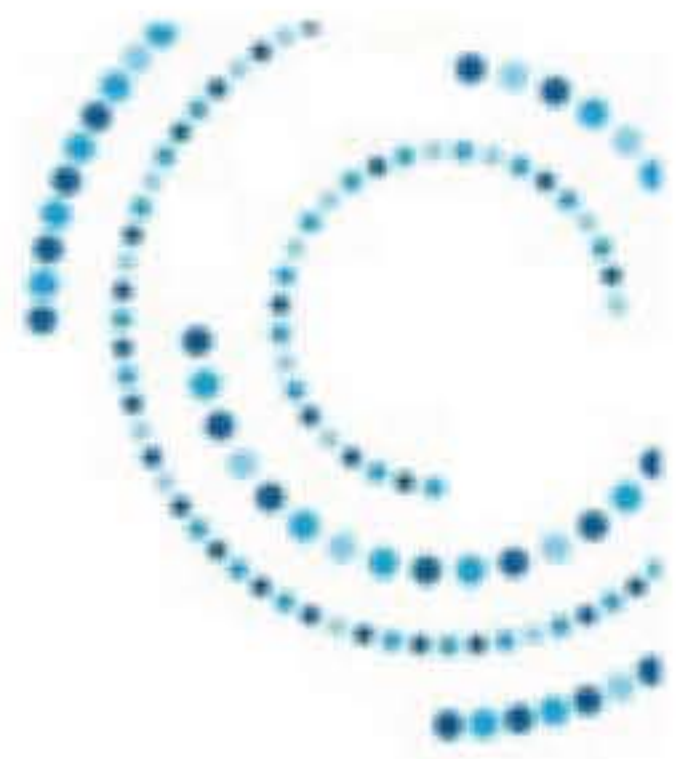
Takeaway:

Opportunity exists to increase efforts to educate customers about energy conservation tips.

Actionable strategy:

In order to do so, West Boylston should develop marketing communication materials that educate customers about energy conservation, as well as WBMLP's rebates, programs and services.

Key Study Findings - *First contact resolution results in satisfied customers*



What we learned:

A high frequency of both residential and commercial respondents reported West Boylston takes care of their reason for contact the first time. Those who did indicate resolution after only one call provided an average company characteristic rating of 97.2%, compared to 92.7% of all surveyed customers.

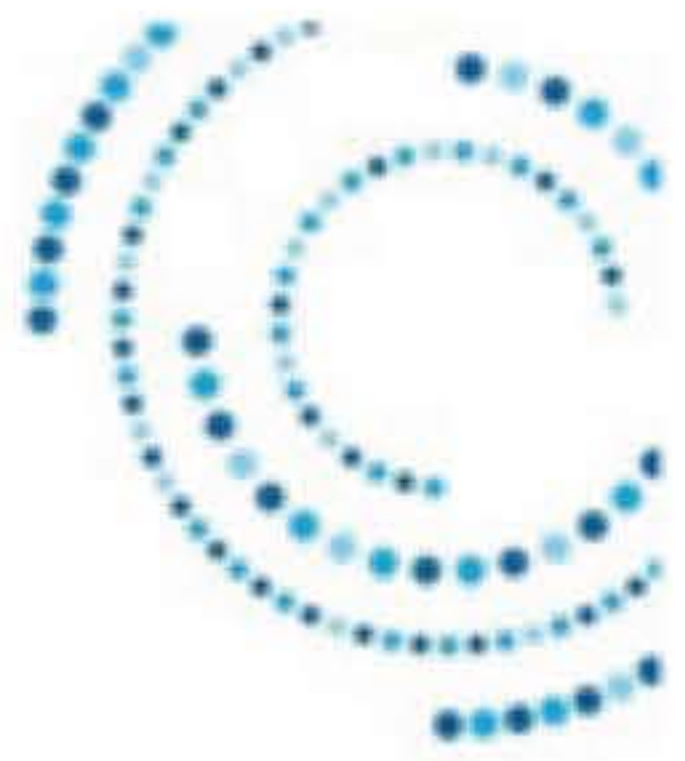
Takeaway:

The strong correlation between first contact resolution and customer satisfaction is a metric consistent across utilities nationwide.

Actionable strategy:

WBMLP should continue to actively ensure customer service employees are trained and well prepared to answer all questions and needs on the first contact where possible.

Key Study Findings - WBMLP website valued by both customer segments



What we learned:

The WBMLP website was rated as both the most preferred information source and the most valuable communication method among residential and commercial respondents.

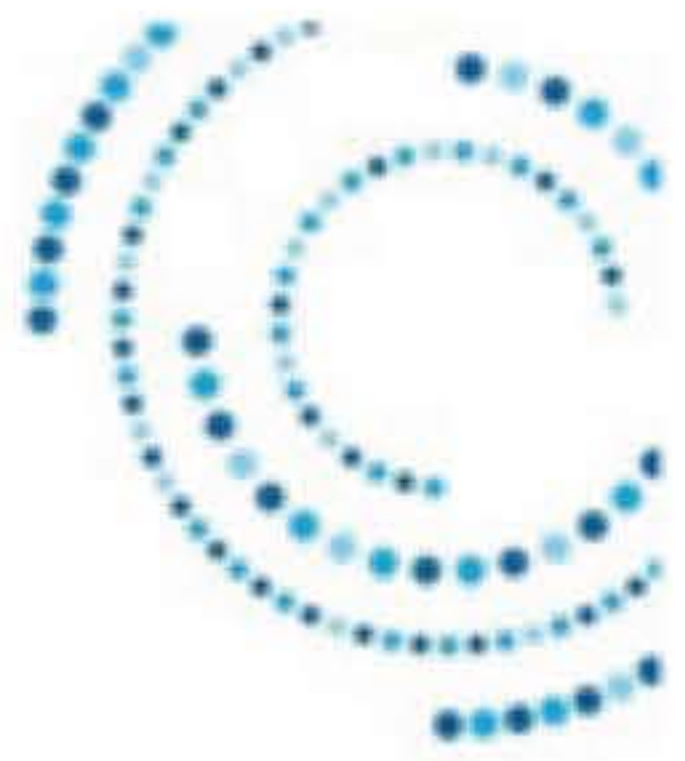
Takeaway:

The majority of customers who seek information about WBMLP will look to the company website as the primary source.

Actionable strategy:

WBMLP should ensure all up-to-date news, content, and information on programs, services and rebates are on the website and easily accessible.

Key Study Findings - *Marked support for Greenhouse Gas Emissions Standard*



What we learned:

Survey results showed marked support for the GGES plan which requires a 100% non-greenhouse gas emitting power supply by 2050. Further, a significant frequency of respondents indicated they would be willing to pay more on their bill to accelerate the program.

Takeaway:

Customers both see the importance of moving toward sustainable energy, and are willing to pay an increase in order to accelerate the process.

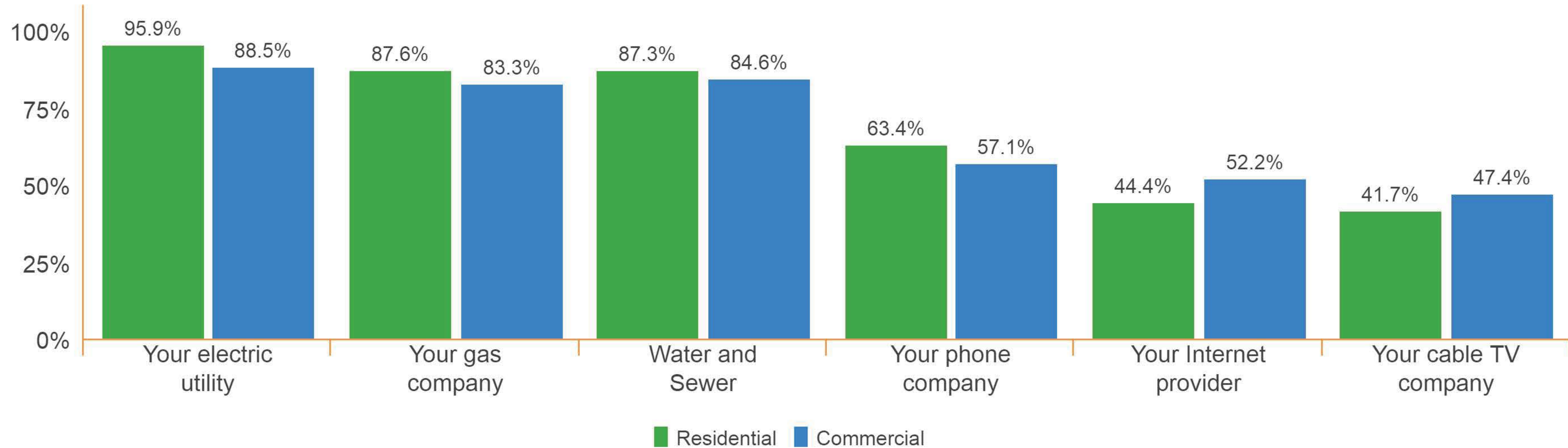
Actionable strategy:

It is recommended that WBMLP consider an opt-in rate program where customers can choose to participate and pay more on their bill in order to accelerate the GGES plan.

WBMLP Rated Highest Among Utility Providers

In 2021, when respondents were asked to rate various utility organizations in the area, their "electric utility" was rated highest by both residential (95.9%) and commercial (88.5%) respondents, followed by their "gas company" (87.6% residential, 83.3% commercial) and "water and sewer" (87.3% residential, 84.6% commercial).

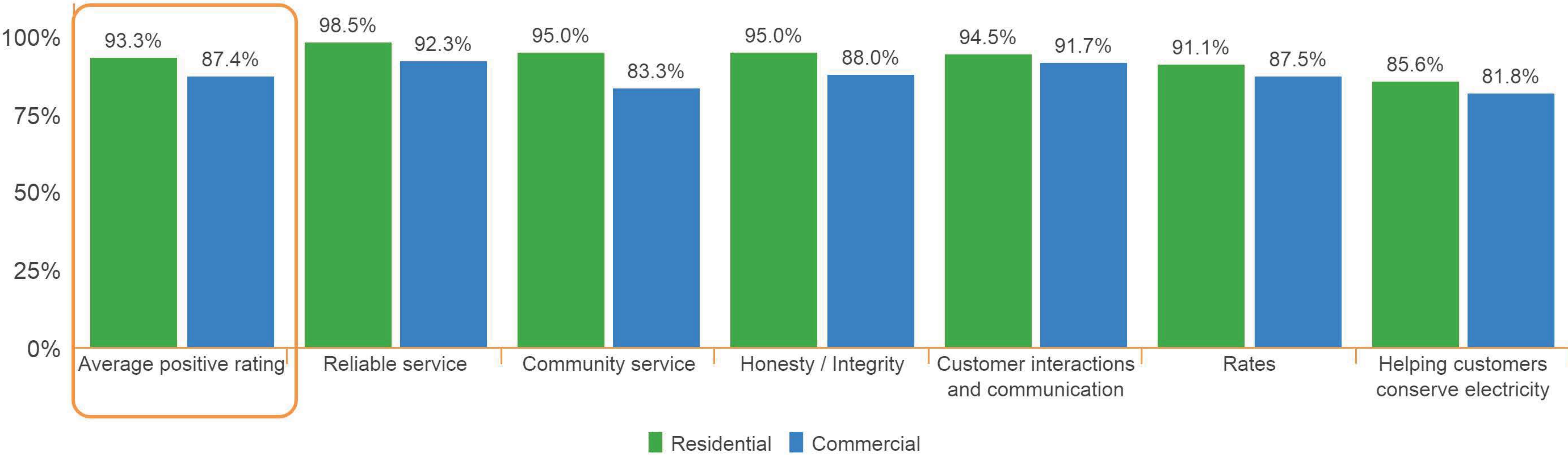
Please think for a moment about the overall quality of customer service you receive from area organizations. As you read the list of area organizations and companies providing services to you, please rate each on the quality of their overall customer service. Please use a scale of one to ten where one is very good and ten is very poor. (Total 1-4 w/o "don't know" responses)



Strong Majority Rate WBMLP Positively

The overall average positive rating for company characteristics was 93.3% among residential respondents and 87.4% among commercial respondents. The characteristic with the highest recorded score was “reliable service” (98.5% residential, 92.3% commercial), followed by “community service” (95.0% residential, 83.3% commercial) and “honesty/integrity” (95.0% residential, 88.0% commercial).

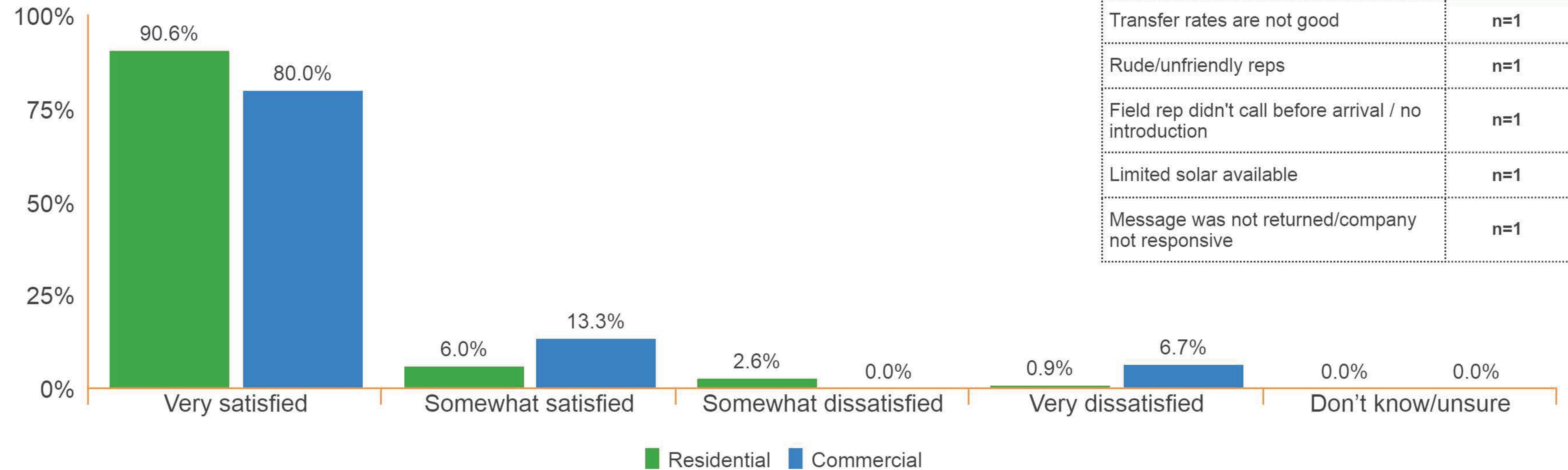
Below is a list of different organizational characteristics. For each one, please rate the West Boylston Municipal Light Plant’s electric service. Again, please use a scale of one to ten where one is very good and ten is very poor. (Total 1-4 w/o "don't know" responses)



Strong Majority Satisfied with Customer Service

The strong majority of both residential (96.6%) and commercial (93.3%) respondents reported they were either "very satisfied" (90.6% residential, 80.0% commercial) or "somewhat satisfied" (6.0% residential, 13.3% commercial) with the way the West Boylston customer service employee handled their call or visit. Of the five (5) respondents who reported they were not satisfied, each provided a separate reason for their dissatisfaction.

Overall, how satisfied were you with the way the West Boylston customer service employee handled the call or visit? Would you say you were...



Please indicate why you were somewhat or very dissatisfied?

	Composite
Transfer rates are not good	n=1
Rude/unfriendly reps	n=1
Field rep didn't call before arrival / no introduction	n=1
Limited solar available	n=1
Message was not returned/company not responsive	n=1

Contact for Bill Questions and Bill Pay Most Frequently

 Please describe the purpose of the call or visit?

Residential respondents indicated the purpose of their call or visit was "question on bill (not a complaint)" (18.8%), followed by "to pay a bill" (14.5%) or a "service call" (12.0%).

Commercial respondents indicated the purpose of their call or visit was "to pay a bill" (40.0%), followed by "question on bill (not a complaint)" (20.0%).

	Residential		Commercial
Question on bill (not complaint)	18.8%	To pay bill	40.0%
To pay bill	14.5%	Question on bill (not complaint)	20.0%
Service call	12.0%	Service call	10.0%
High bill question	8.5%	High bill question	10.0%
Outage	7.7%	Schedule a visit	10.0%
Install service	5.1%	Solar power information	10.0%
Request meter check	5.1%		
Purchase trash bags	4.3%		
General information/question	3.4%		
Other	3.4%		

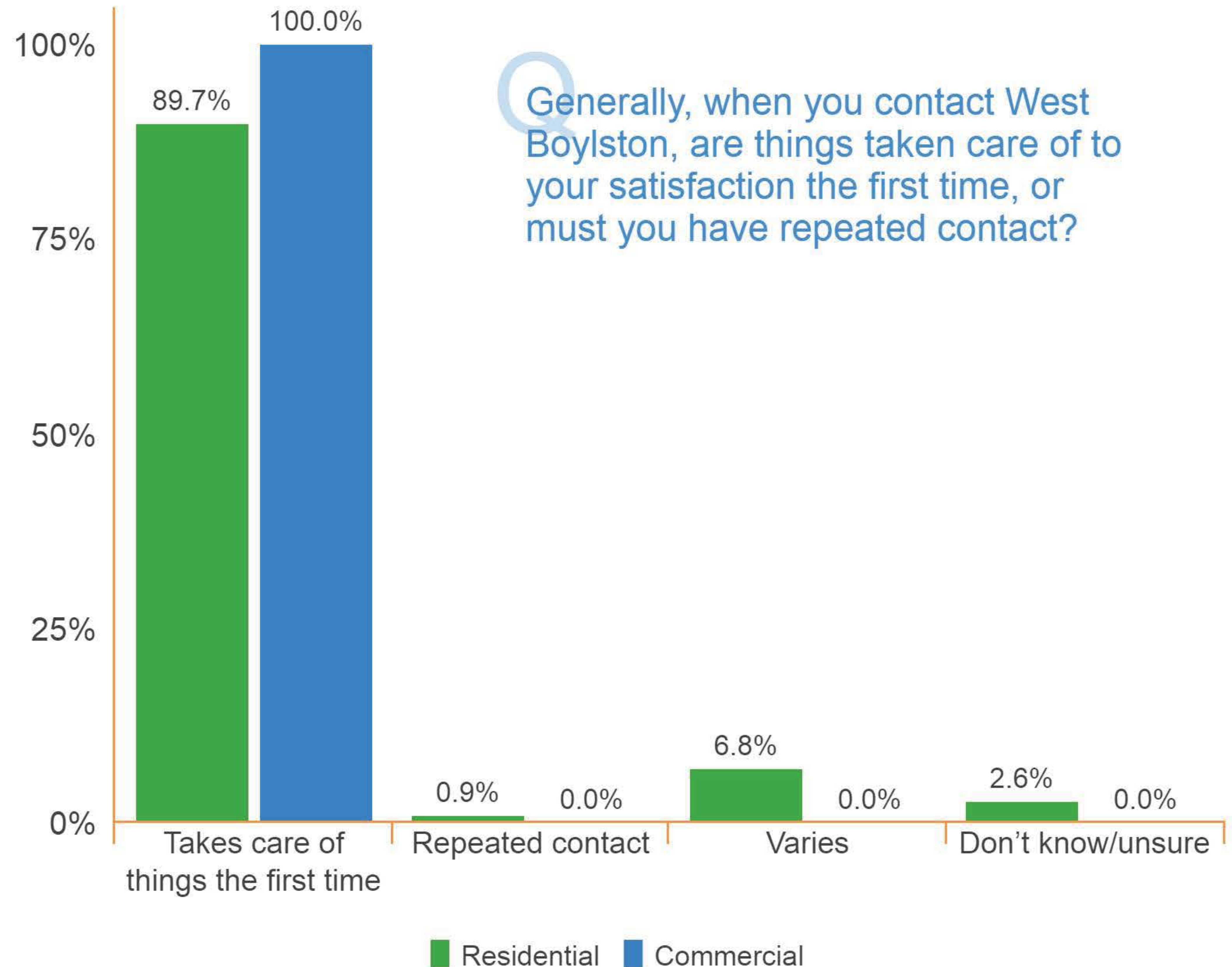
First Contact Resolution Yields Higher Satisfaction

Roughly nine-out-of-ten residential customers (89.7%) and 100.0% of commercial customers reported that when they contact West Boylston, the utility takes care of things the first time.

This is an important metric to track, as customers who reported WBMLP takes care of things the first time also provided an average company characteristic rating of 97.2%.

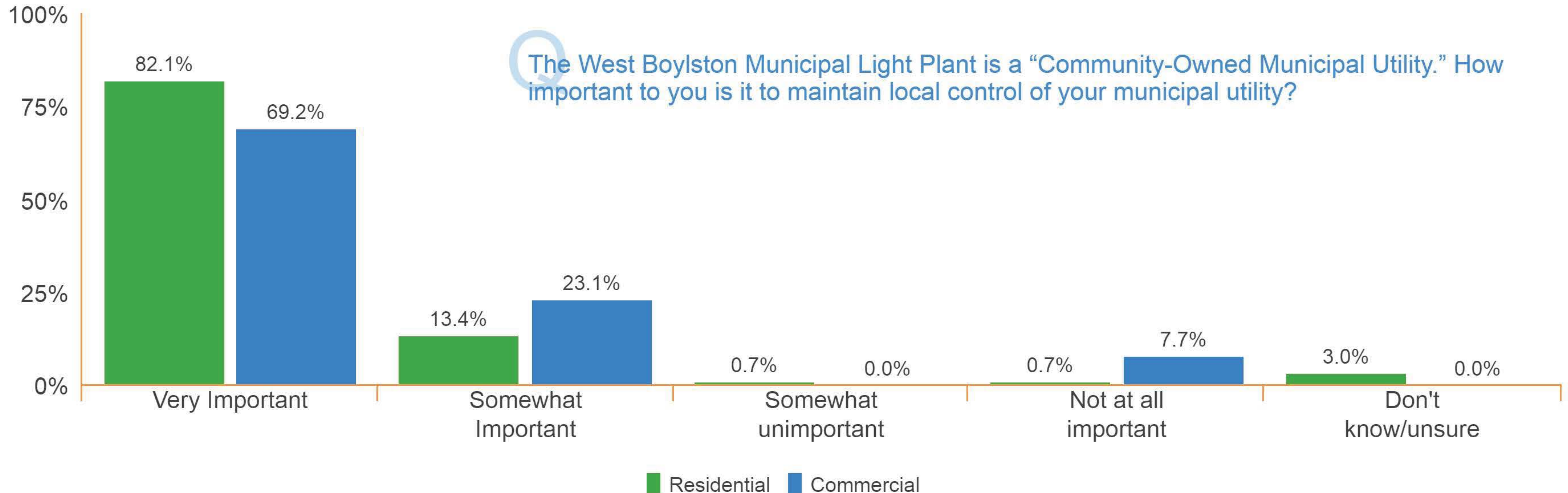
97.2%

The average organization characteristics score of residential and commercial customers who reported WBMLP takes care of things the first time.



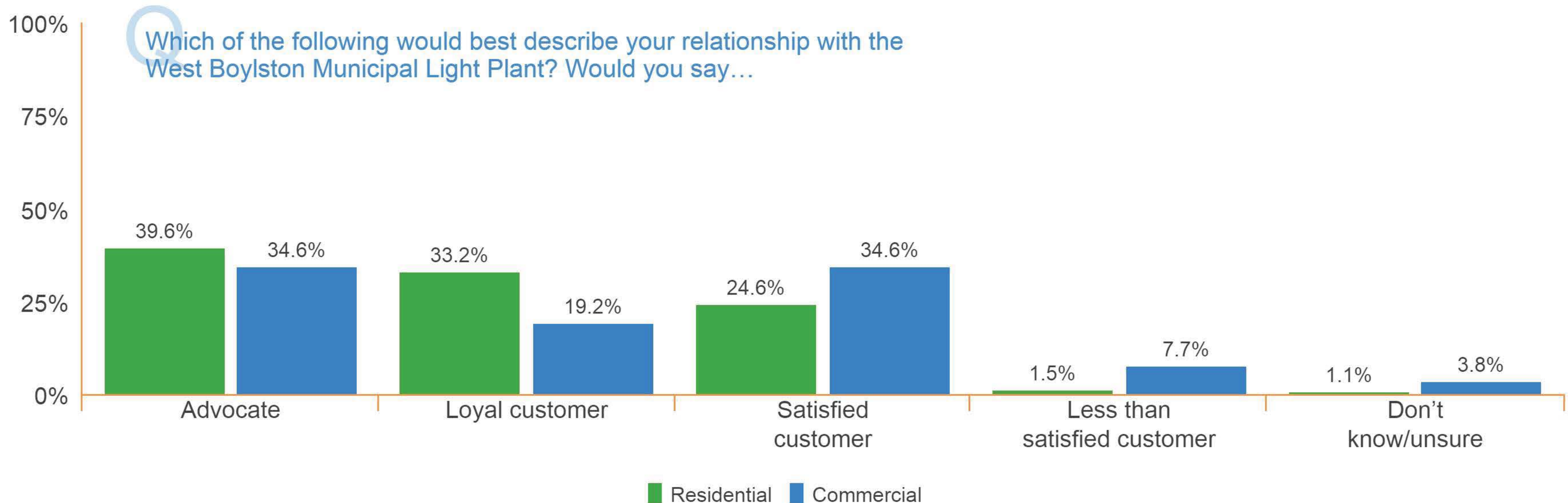
Strong Majority Indicate a Community-Owned Utility is "Important"

The strong majority of both residential (95.5%) and commercial (92.3%) respondents reported it is either "very important" (82.1% residential, 69.2% commercial) or "somewhat important" (13.4% residential, 23.1% commercial) that West Boylston is a community-owned municipal utility.



Higher Net Positive Score Among Residential Customers

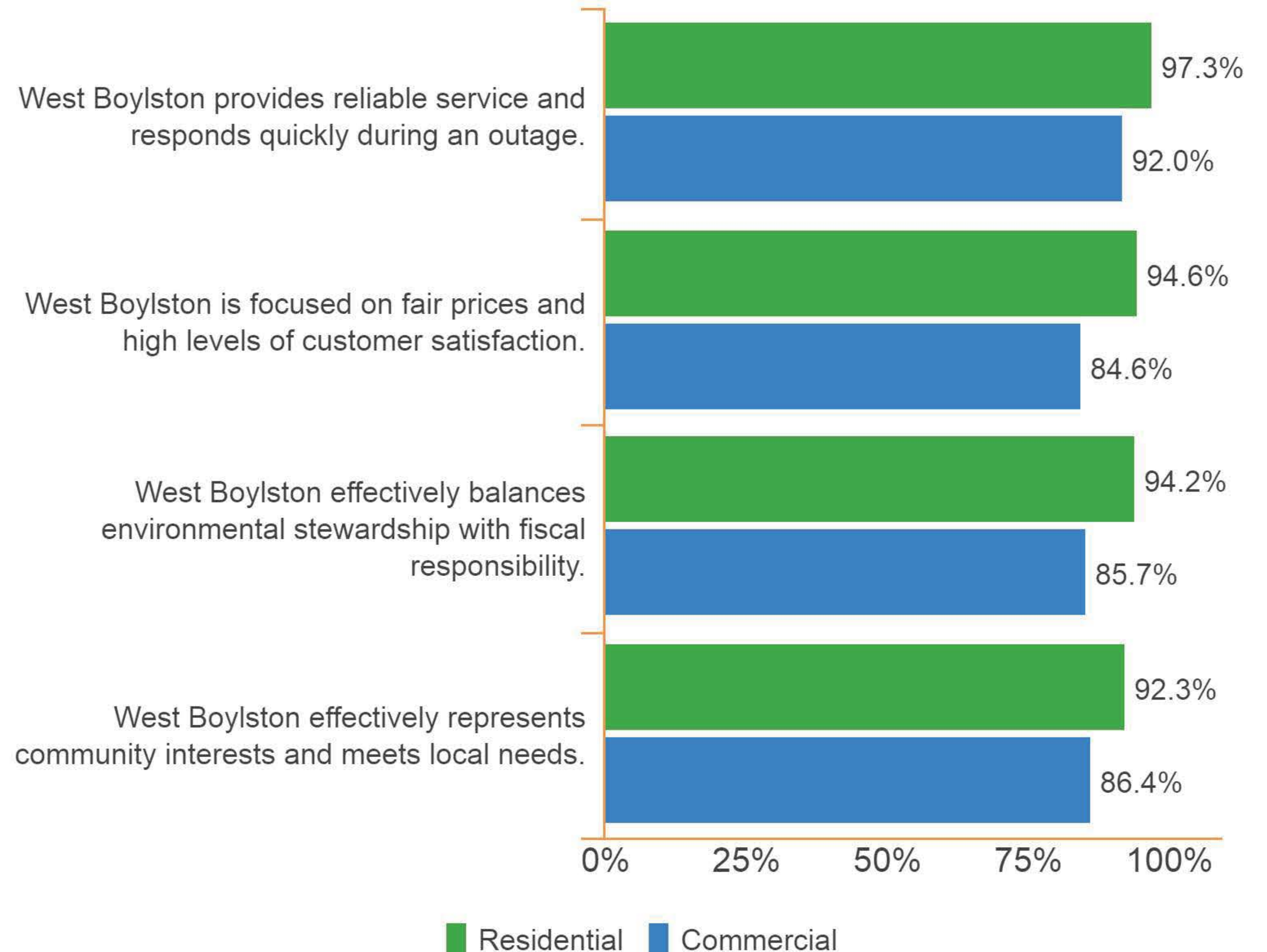
When customers surveyed in 2021 were asked to describe their relationship with their electric company, WBMLP received a net positive score (advocate + loyal + satisfied) of 97.4% among residential customers (39.6% “advocate”; 33.2% “loyal”; and 24.6% “satisfied”) and 88.4% among commercial customers (34.6% “advocate”; 19.2% “loyal”; and 34.6% “satisfied”).



Strong Levels of Agreement with WBMLP Statements

Surveyed customers indicated the highest level of agreement for West Boylston "providing reliable service and responding quickly during an outage" (97.3% residential, 92.0% commercial), followed by "focused on fair prices and high levels of customer satisfaction" (94.6% residential, 84.6% commercial), "effectively balances environmental stewardship with fiscal responsibility" (94.2% residential, 85.7% commercial) and "effectively represents community interests and meets local needs" (92.3% residential, 86.4% commercial).

Now you will see a list of different characteristics common to municipally owned utilities. For each one please rate how well each characteristic describes West Boylston. Please use a scale of one to ten where one means you strongly agree and ten means you strongly disagree. (Total "1-4" w/o "don't know" responses)



WBMLP Website Reported as Preferred Information Source

Three-out-of-five surveyed customers reported they prefer to look for information about WBMLP through the utility "website" (60.4% residential, 61.5% commercial).

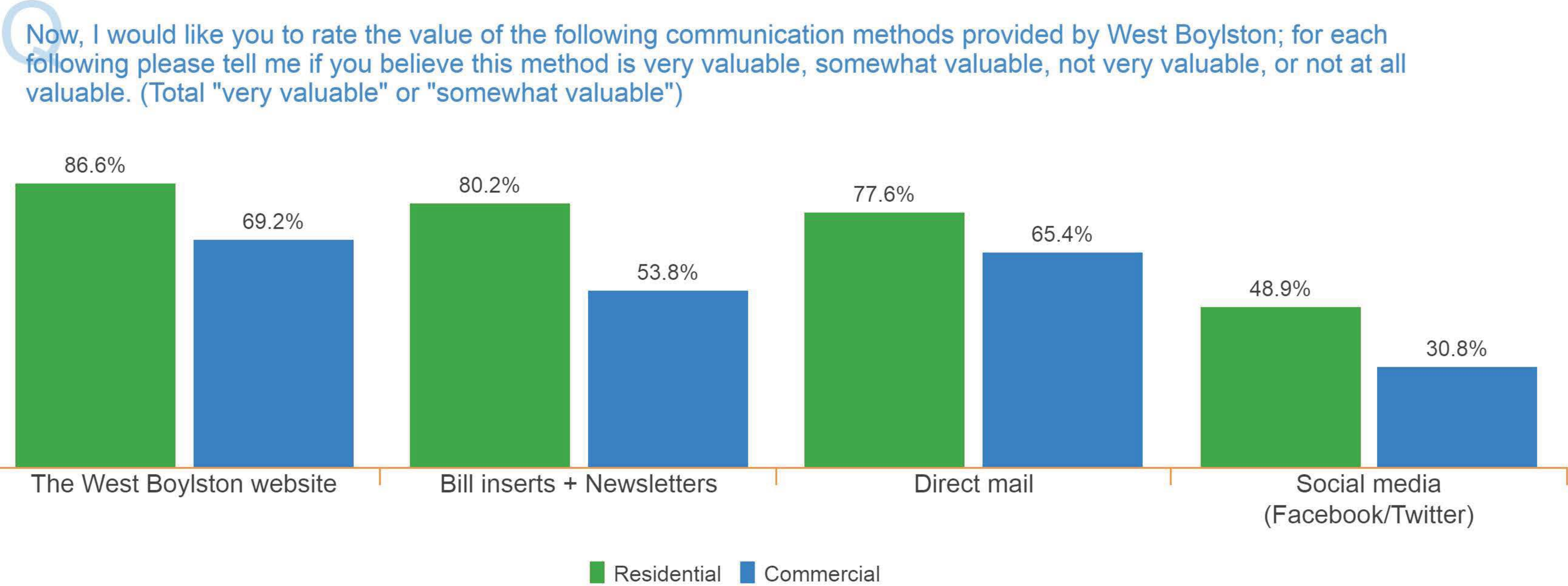
Residential customers reported "utility's bill inserts" (38.1%) as the second most preferred method, while commercial respondents indicated "direct contact" (23.2%).

And, please tell where you would prefer to look for information about West Boylston? (Select all that apply)

	Residential	Commercial
Website	60.4%	61.5%
Utility's bill inserts	38.1%	15.4%
Direct mail	26.5%	3.8%
Utility's newsletter/brochures	21.3%	11.5%
Facebook/Twitter	19.0%	3.8%
Newspaper stories	10.8%	0.0%
Direct contact	10.8%	23.1%
Friends and co-workers	5.2%	0.0%
Community organizations	5.2%	0.0%
TV stories	2.2%	0.0%
Newspaper ads	1.9%	0.0%
Radio stories	1.1%	3.8%
TV ads	0.7%	0.0%
Radio ads	0.7%	0.0%
Employees of supplier	0.7%	3.8%
Other	3.0%	0.0%
None	1.5%	0.0%
Don't know/unsure	1.9%	3.8%

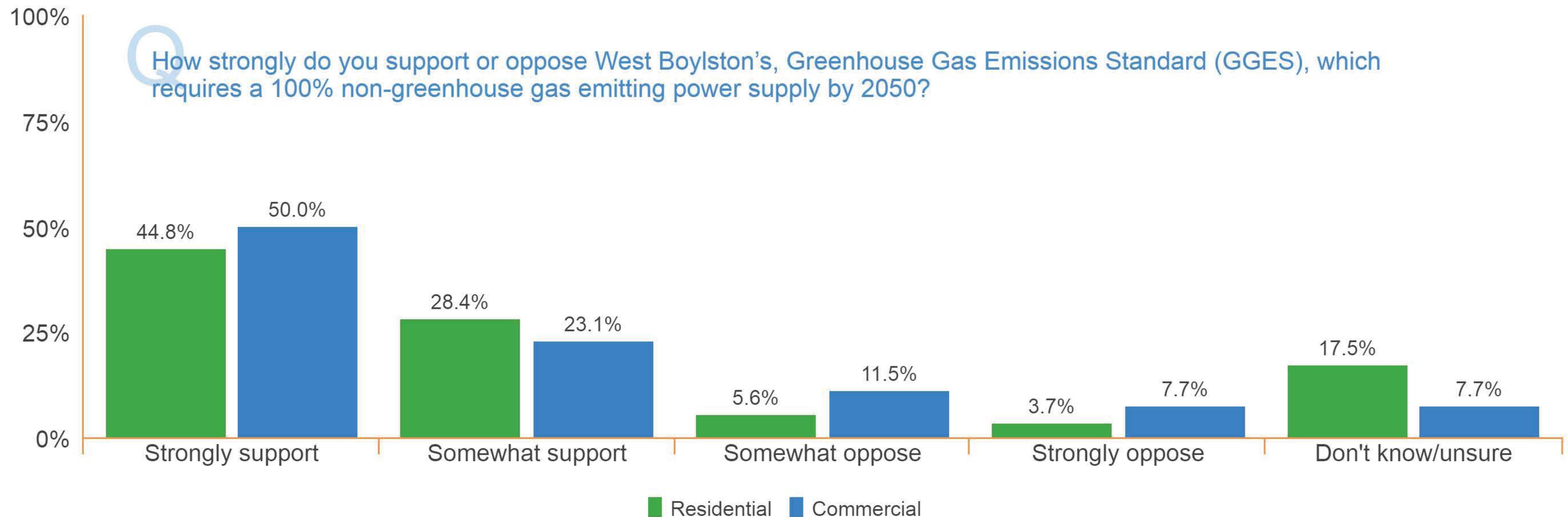
WBMLP Website Rated Most Valuable

Surveyed customers rated the "West Boylston website" (86.6% residential, 69.2% commercial) as the most valuable WBMLP communication method, followed by "bill inserts + newsletters" (80.2% residential, 53.8% commercial), "direct mail" (77.6% residential, 65.4% commercial) and "social media" (48.9% residential, 30.8% commercial).



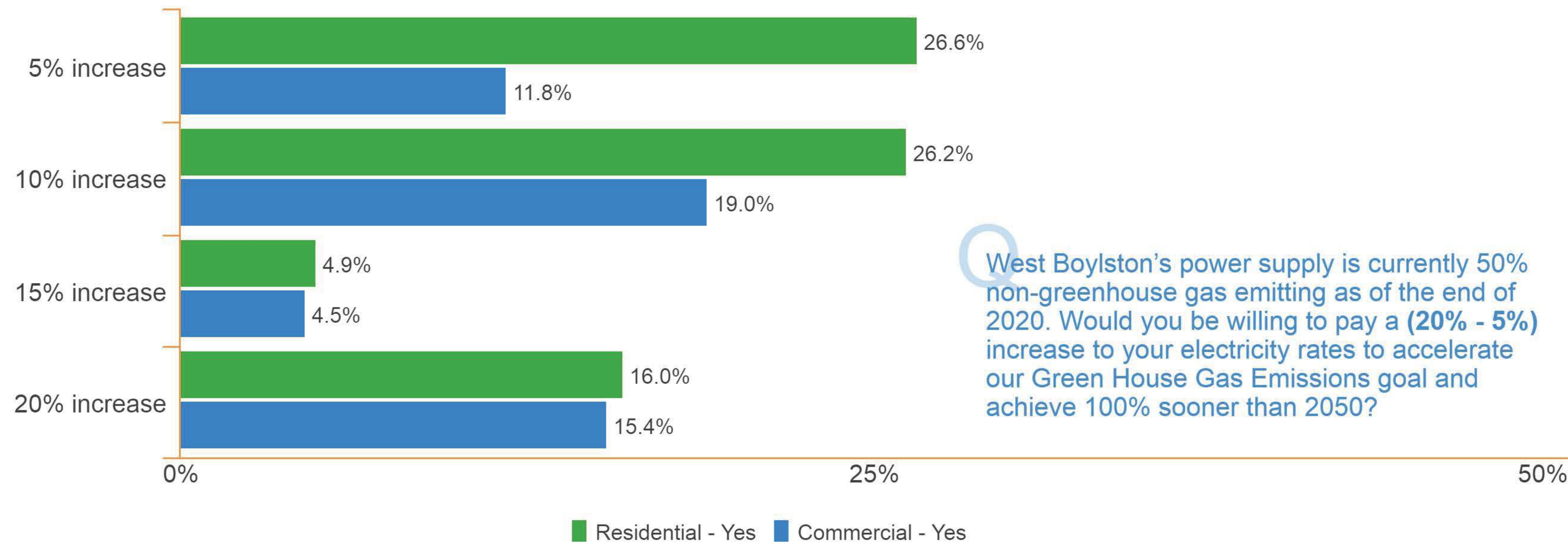
Majority Support West Boylston's GGES

The majority of both residential (73.2%) and commercial (73.1%) respondents reported they either "strongly support" (44.8% residential, 50.0% commercial) or "somewhat support" (28.4% residential, 23.1% commercial) West Boylston's Greenhouse Gas Emissions Standard (GGES).



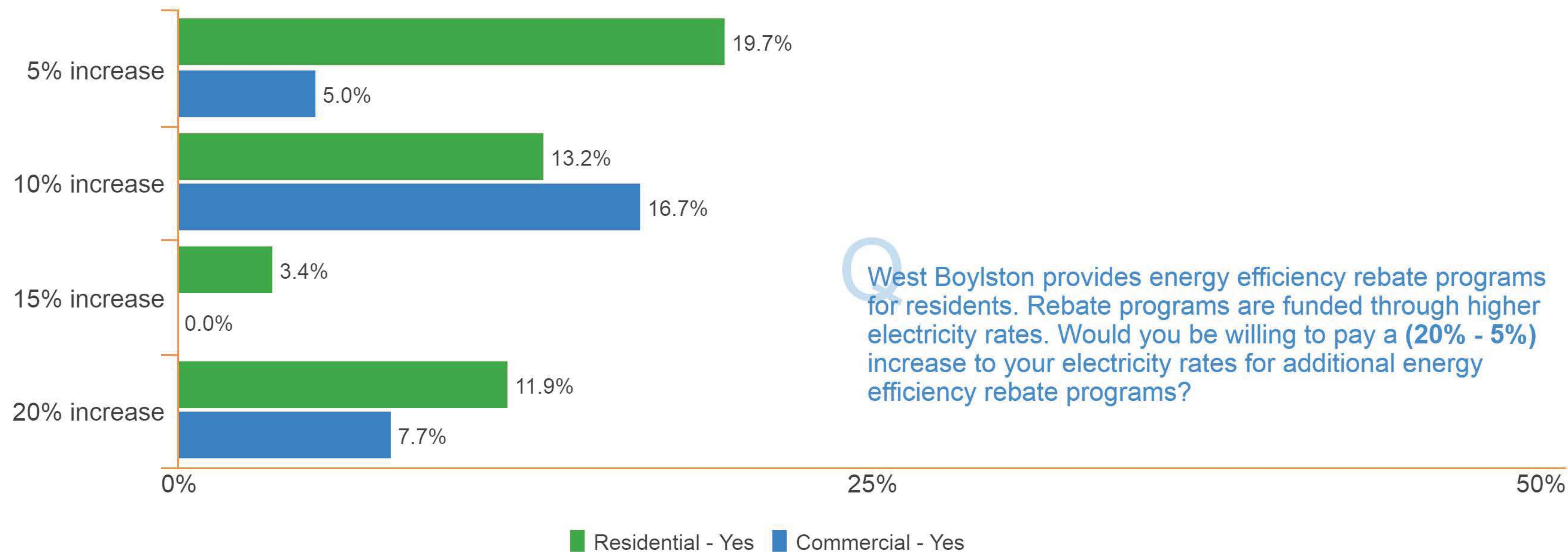
Willingness to Pay to Accelerate GGES Goals

Overall, surveyed customers reported a willingness to pay an increase on their WBMLP bill in order accelerate the Green House Gas Emissions goal, with 16.0% of residential customers and 15.4% of commercial customers reporting they would pay a 20% increase, while 4.9% would pay a 15% increase (4.5% commercial), 26.2% would pay a 10% increase (19.0% commercial) and 26.6% would pay a 5% increase (11.8% commercial).



Willingness to Pay for Rebate Programs

Overall, surveyed customers reported a willingness to pay an increase on their WBMLP bill for additional energy efficiency rebate programs, with 11.9% of residential customers and 7.7% of commercial customers reporting they would pay a 20% increase, while 3.4% would pay a 15% increase (0.0% commercial), 13.2% would pay a 10% increase (16.7% commercial) and 19.7% would pay a 5% increase (5.0% commercial).

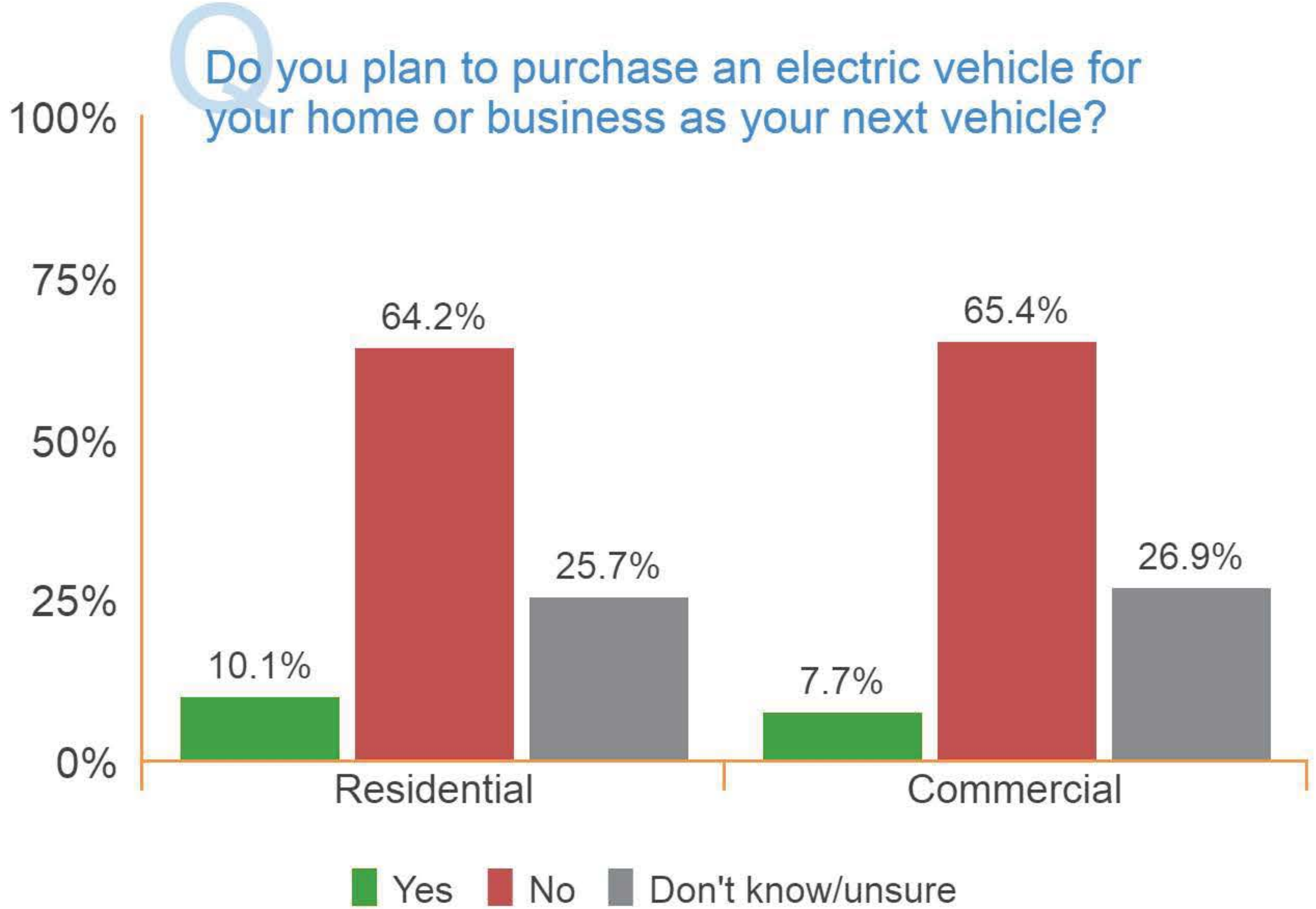
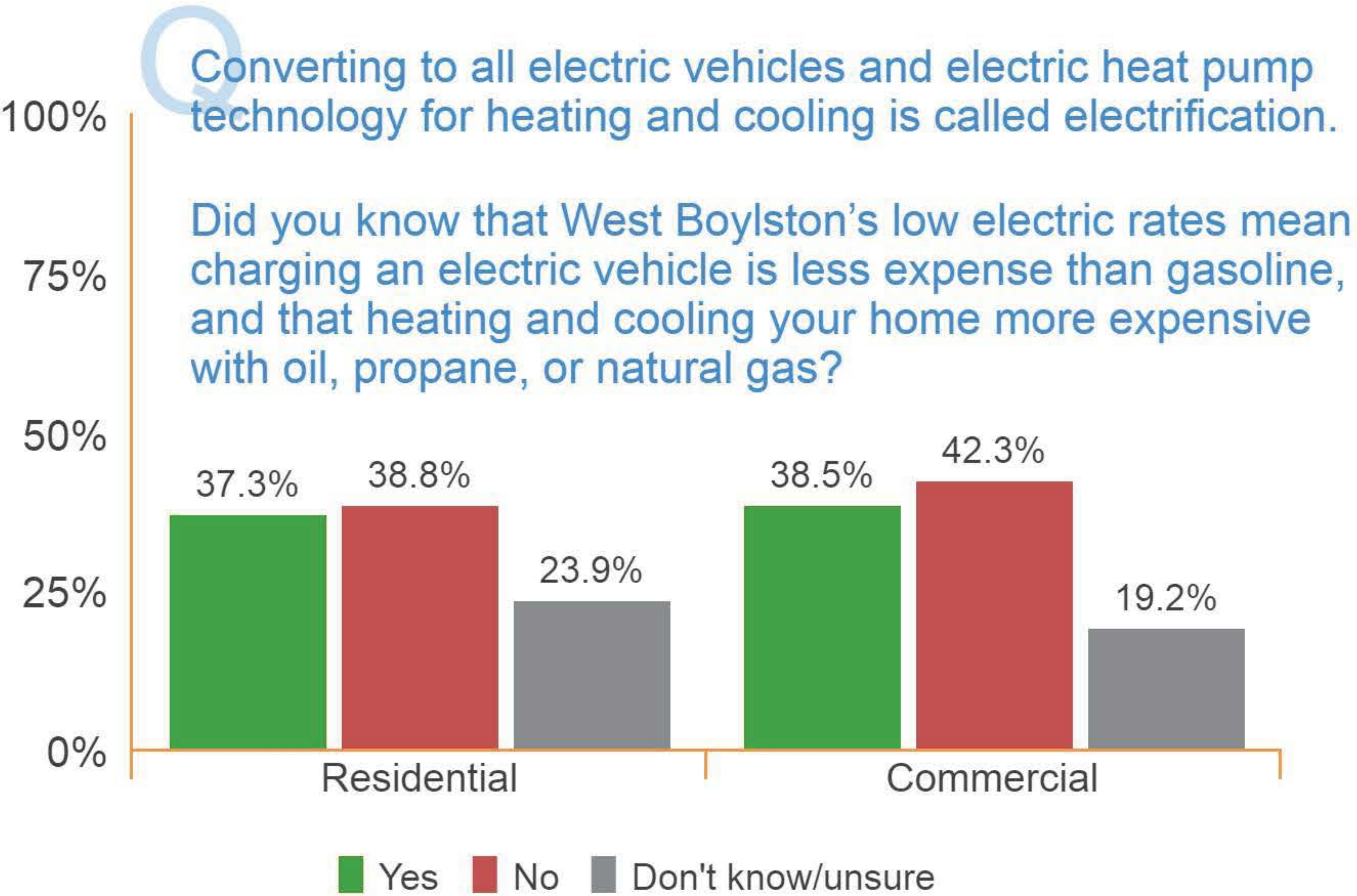


West Boylston provides energy efficiency rebate programs for residents. Rebate programs are funded through higher electricity rates. Would you be willing to pay a (20% - 5%) increase to your electricity rates for additional energy efficiency rebate programs?

Low Awareness of Electrification Savings

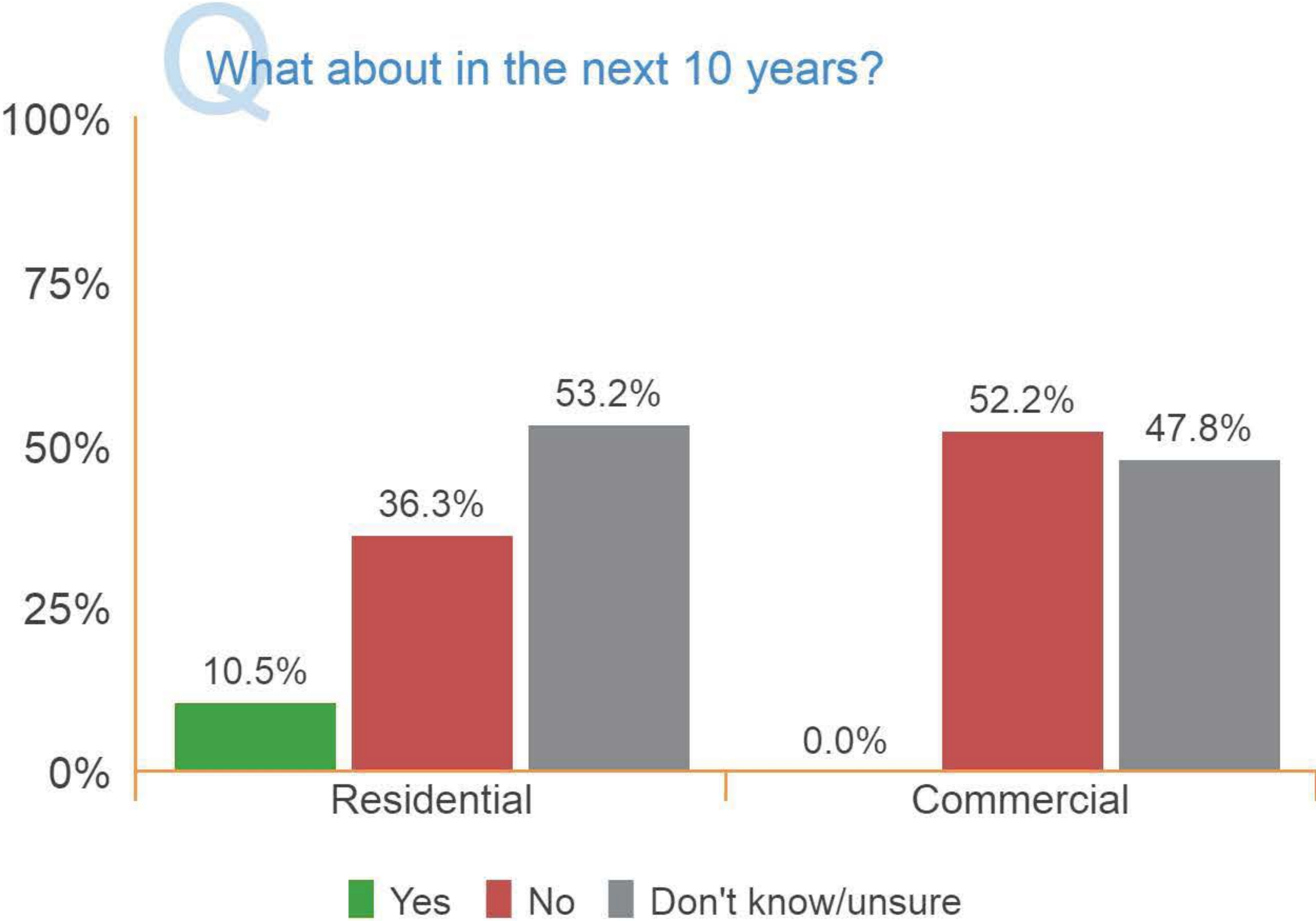
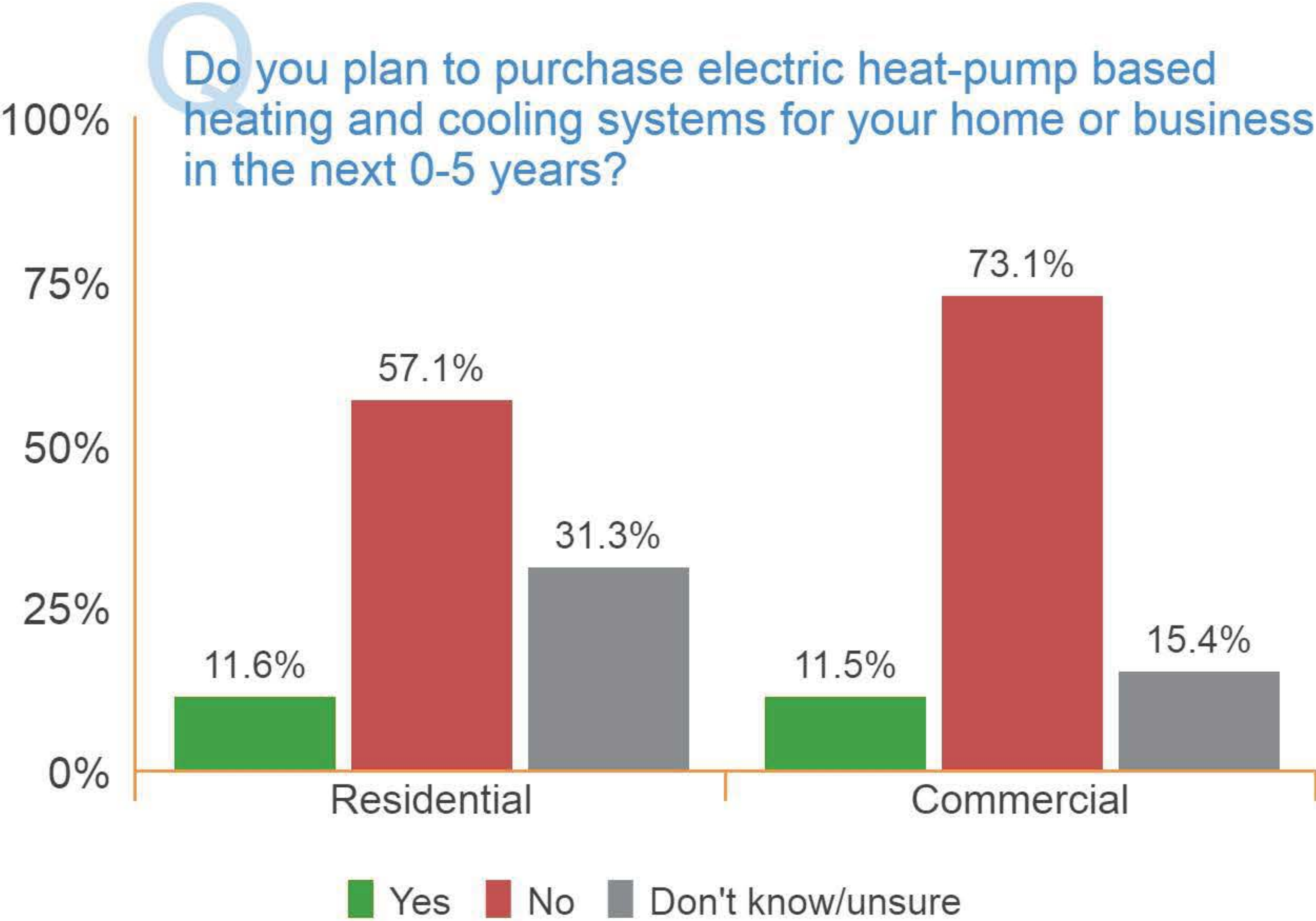
A significant frequency of both residential (62.7%) and commercial (61.5%) respondents indicated they did not know (38.8% residential, 42.3% commercial) or were unsure (23.9% residential, 19.2% commercial) West Boylston's low electric rates result in electric vehicles and heating/cooling systems being less expensive than using fossil fuels.

Of note, roughly one-out-of-ten residential respondents (10.1%) and 7.7% of commercial respondents indicated their next vehicle would be electric, while a significant frequency reported being unsure (25.7% residential, 26.9% commercial).



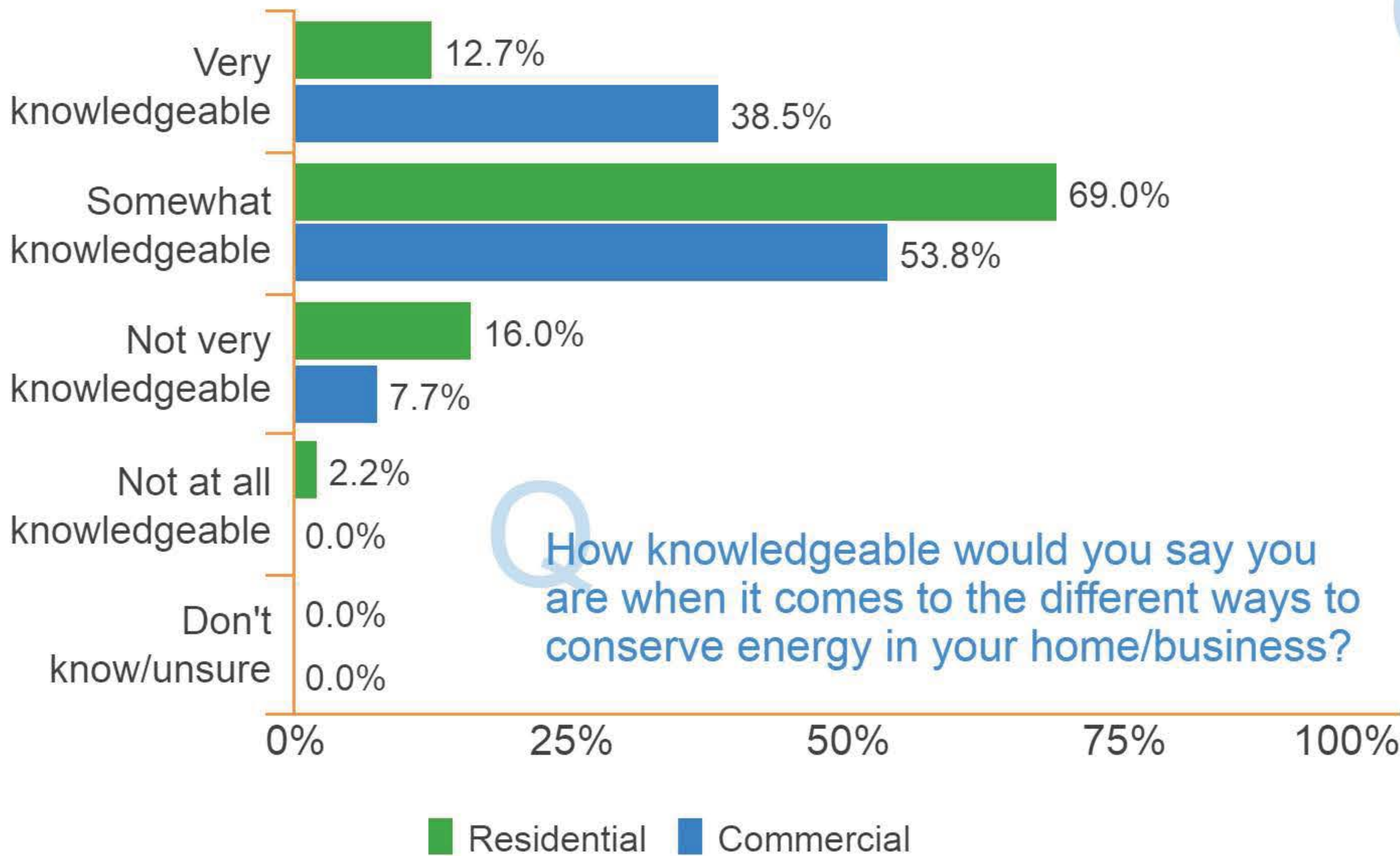
Majority Do Not Plan on Purchasing an Electric Heat Pump

The majority of both residential (57.1%) and commercial (73.1%) respondents indicated they do not plan to purchase electric heat-pump based heating and cooling systems for their home or business in the next 5 years. When respondents were prompted to indicate if they plan to make the same purchase in the next 10 years, the majority of residential respondents (53.2%) reported they were unsure, while 52.2% of commercial respondents reported "no" and 47.8% were unsure.



Majority Knowledgeable about Energy Conservation

The majority of both residential (81.7%) and commercial (92.3%) respondents reported they were either "very knowledgeable" (12.7% residential, 38.5% commercial) or "somewhat knowledgeable" (69.0% residential, 53.8% commercial) when it comes to ways to conserve energy. The most frequent steps taken to reduce energy consumption were "turning off lights/electronics when leaving the room" (93.3% residential, 69.2% commercial), "adjust thermostat temperatures" (89.2% residential, 73.1% commercial) and "substitute LEDs for conventional lightbulbs" (85.1% residential, 80.8% commercial).



And, have you taken any of the following steps to reduce your energy consumption? (Select all that apply)

	Residential	Commercial
Turning off lights/electronics when leaving the room	93.3%	69.2%
Adjust thermostat temperatures	89.2%	73.1%
Substitute LEDs for conventional lightbulbs	85.1%	80.8%
Running full loads of laundry with colder water	70.5%	30.8%
Using energy-saving features on electronic devices	48.5%	50.0%
Air dry dishes to decrease use of dishwasher	42.5%	19.2%
Unplug appliances and electronics when not in use	41.8%	53.8%
Reducing temp./turning off water heater when not in use	25.4%	19.2%
Other	4.9%	3.8%
None of the above	0.0%	3.8%

Communication, Rebates, and Energy Audits to Help Conserve Energy

When prompted to indicate what WBMLP could do to help customers conserve energy, residential respondents indicated "improve communication/provide educational resources" (24.3%) most frequently, followed by "rebates/discounts" (14.9%) and "energy audits/assessments" (12.2%). Commercial customers prioritized "rebates/discounts/incentive offerings" (33.3%) as how WBMLP could help them conserve energy.



What, if anything, could West Boylston do to help you conserve energy?

	Residential
Improve communication/provide educational resources	24.3%
Rebates/discounts/incentive offerings	14.9%
Energy audits/assessments	12.2%
Doing a good job / keep up the good work	8.1%
Lower cost/rates	6.8%
Promote/subsidize/invest in geothermal heating, electric conversions	6.8%

	Commercial
Rebates/discounts/incentive offerings	33.3%
Improve communication/provide educational resources	16.7%
Energy audits/assessments	16.7%
Introduce more renewable energy options	16.7%
Replace furnace	16.7%

Reliability Ranked Most Important

Both residential (53.7%) and commercial (57.7%) respondents ranked "reliability" as the most important topic for WBMLP to take into account in long-term planning, followed by "cost of electricity" (35.8% residential, 42.3% commercial) and "reduction of carbon in the electricity portfolio" (10.4% residential, 0.0% commercial).

Municipal utilities are directly accountable to customers and take customer desires into account in their long-term planning. When it comes to your local electrical service, please rank the following three topics from most important to least important.

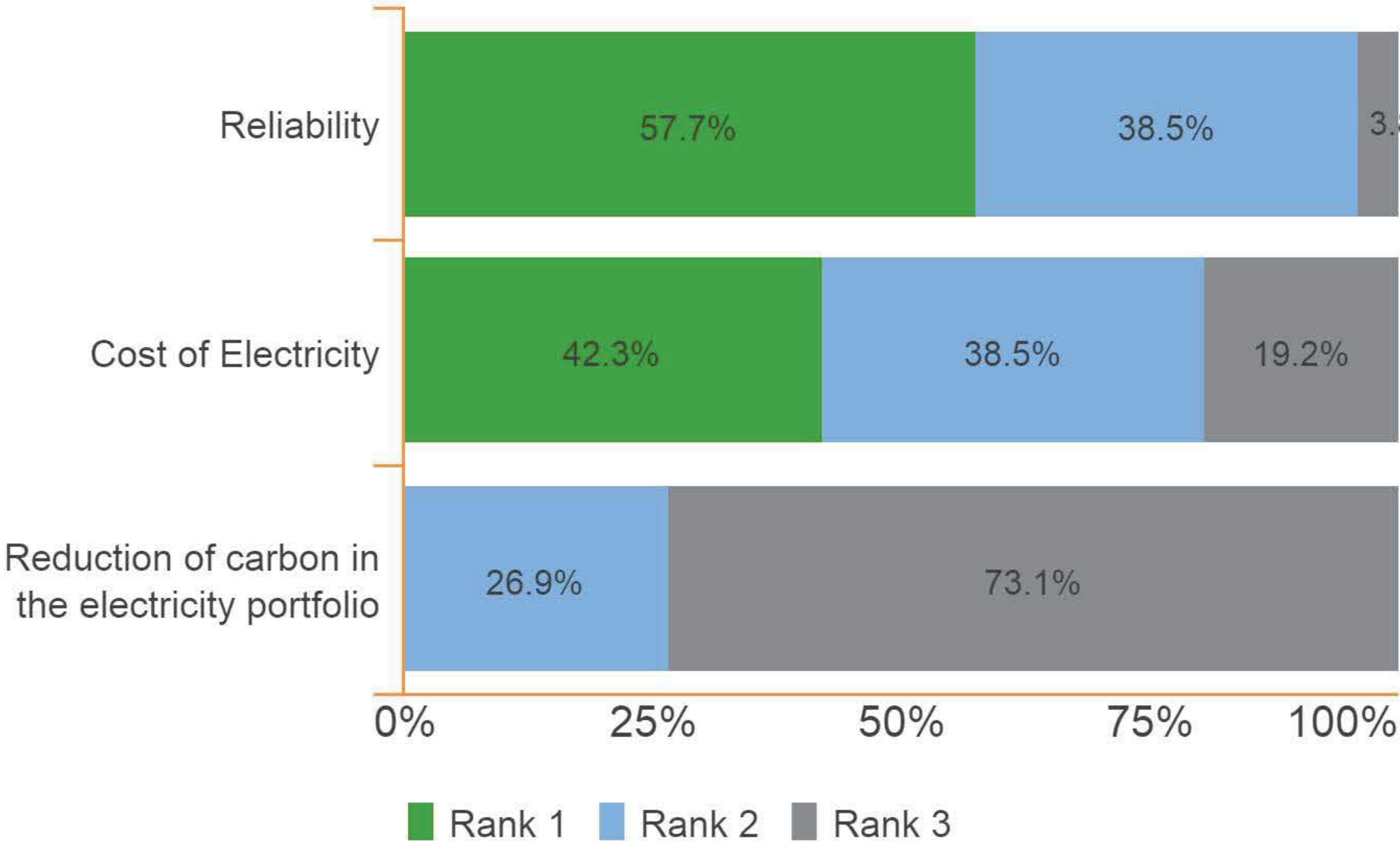
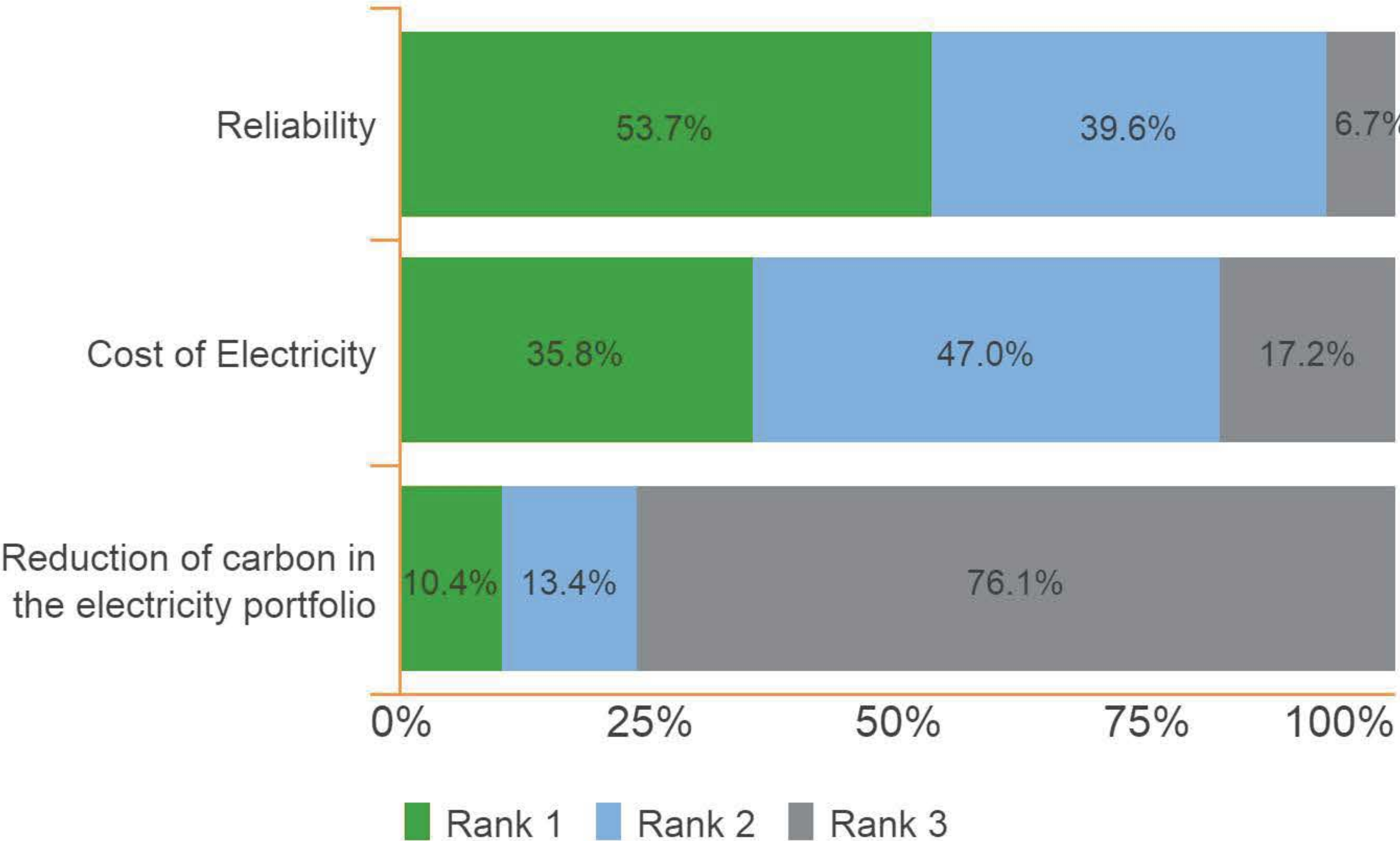


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Considerations

- **Develop marketing communication materials that educate customers about energy conservation, as well as WBMLP's rebates, programs and services.** With "helping customers with energy conservation" rated the lowest organizational characteristic and customers indicating WBMLP can help them conserve energy by "improving communication and providing educational resources," the opportunity exists to develop related marketing communication materials. WBMLP should develop content specific to residential and commercial customers, as programs, services, and rebates differ between segments.
- **Maintain high frequency of first contact resolution.** WBMLP should continue to actively ensure customer service employees are trained and well prepared to answer all questions and needs on the first contact where possible. Charting best practices for customer service staff could prove beneficial to ensure all are well-equipped to solve issues and questions on the first point of contact rather than needing to seek additional information and require multiple points of contact for the customer.
- **Ensure all news, content, and information on programs, services and rebates are on the website and easily accessible.** Respondents indicated they both prefer using the WBMLP website and find it to be the most valuable information source. Therefore, WBMLP should ensure the website remains up-to-date and easily accessible, as it is an important medium among customers. QR codes could also be implemented on bills or bill inserts, in order to easily direct customers to the WBMLP website.
- **Consider an opt-in rate increase program in order to accelerate the GGES plan.** Surveyed customers reported strong support for the GGES plan and reported a willingness to pay an increase on their monthly bill in order to accelerate the emissions goal prior to 2050. GreatBlue recommends West Boylston consider implementing an opt-in program where customers can choose to participate and pay more on their bill to accelerate the GGES plan, as customers indicated they would be willing.

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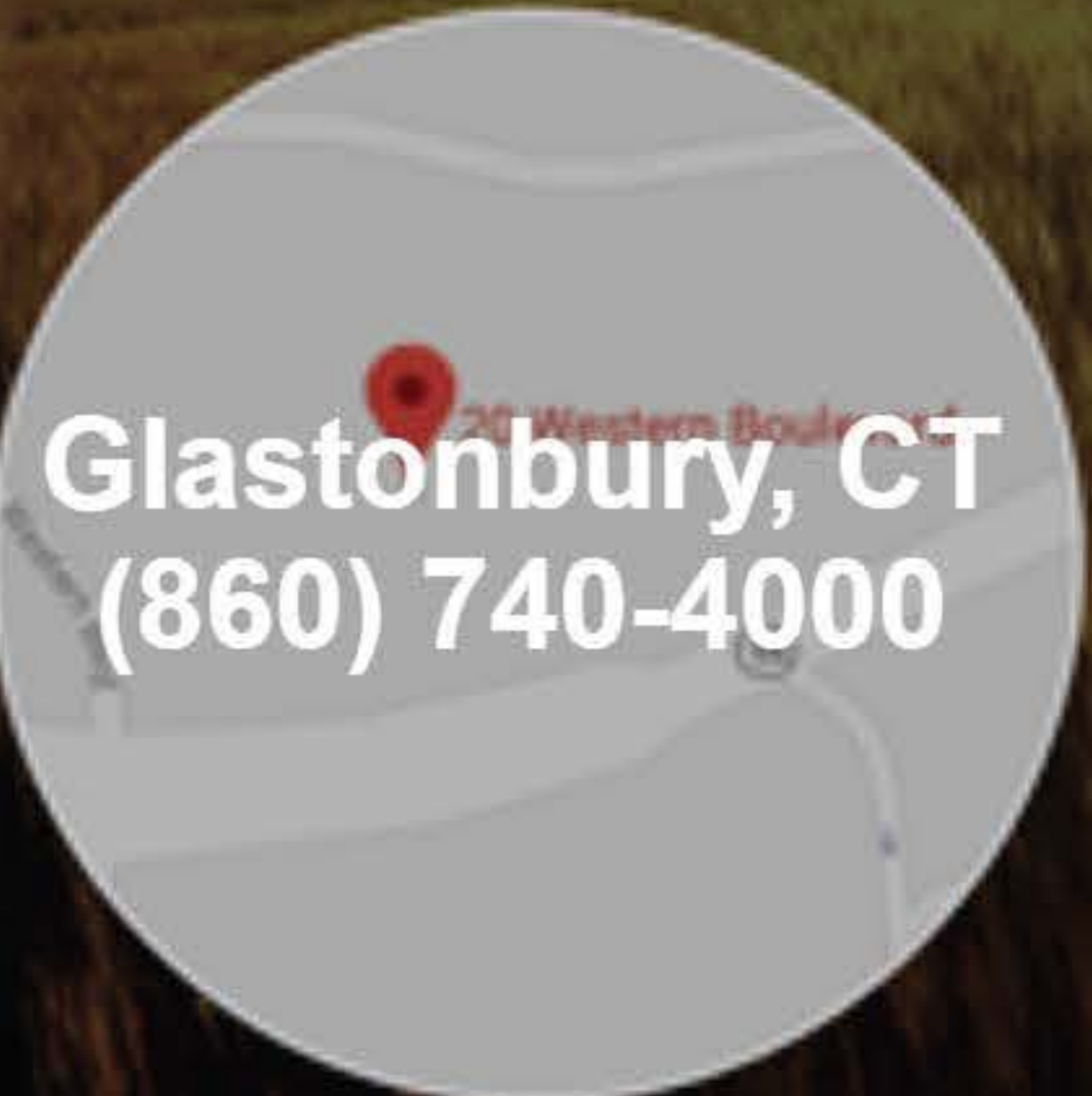
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