

A MarketSearch *Topline*

Santee Cooper

2020 Commercial Customer Satisfaction

This report presents the 2020 findings of **Santee Cooper's** annual *Commercial Customer Satisfaction Study*. Conducted annually since 1999, objectives of the study are:

- ✓ To monitor *Overall Satisfaction* among the utility's commercial customers;
- ✓ To measure satisfaction relative to several aspects of **Santee Cooper's** quality, service, customer service and rates and track changes in satisfaction over time;
- ✓ To assess awareness of and interest in energy efficiency programs; and
- ✓ To gather other information that can be used to maintain and improve relationships with **Santee Cooper's** Commercial Customers.

These objectives are addressed via a quantitative survey format. Between 2000 and 2007 the study was conducted by mail. Between 2008 and 2019 (as well as in 1999), data for the study were collected via telephone interviews. This year, an online element was added as well to extend reach and allow all commercial customers the opportunity to participate in the study.

Trend Data and Comparisons. To maintain consistency and ensure comparability over time, study results presented in this report are based on telephone interview results only. In addition, results for each question are based on respondents answering the specific question; "No Answer" and "Don't Know" responses have been omitted in calculating percentages.

Unless otherwise indicated, numbers in graphs and tables are in percent.

Additional information regarding study design, implementation, and specifications is provided at the end of this report.

Executive Summary

Commercial customers continue to be quite satisfied with **Santee Cooper**. *Overall Satisfaction* is at 96.1% this year, with 66.7% indicating they are *very satisfied* (Q2).

Levels on all satisfaction measures (service quality, customer service, conservation, and rates) continue to be quite high, with no statistically significant changes this year. Still, several measures relating to conservation and environmental responsibility have dropped to all-time lows.

Other study findings indicate:

- More than half (54%) of commercial customers have had direct contact with one or more **Santee Cooper** employees within the past year and, of those, nine out of ten (91%) had a positive experience (Qs 3, 4, and 5).
- Familiarity of **Santee Cooper's** energy efficiency and rebate programs continues to be somewhat limited among commercial customers. (Qs 7, 9a, and 9b) There is interest among a significant minority of customers, however, in new incentive programs being considered. (Qs 8b, 11a, and 11b)

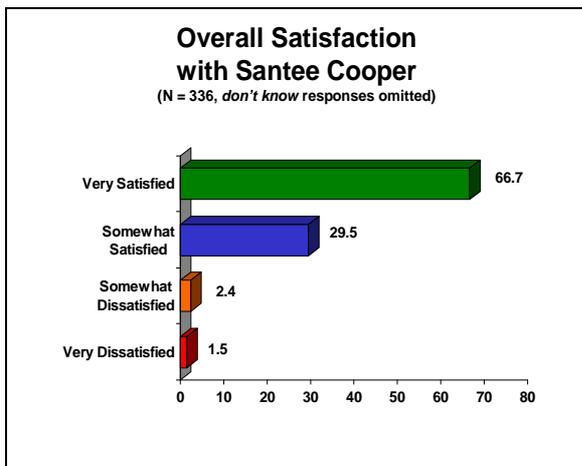
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2020 Commercial Customer Satisfaction Summary (<i>don't know responses omitted</i>)				
	<u>Total Satisfaction</u>	<u>% Point Change from 2019</u>	<u>All-Time High</u>	<u>All-Time Low</u>
Restoring power as quickly as possible after an interruption	99.7	+ 2.3	99.7% (2010, 2012, and 2020)	97.0% (2014)
Keeping power outages to a minimum	99.1	+ 1.1	99.3% (2008)	96.0% (2001)
Quality of electric power provided	98.8	+ 0.1	99.7% (2012)	93.9% (2000)
Responding quickly to customer questions and problems	97.5	+ 0.7	99.0% (2012)	93.2% (2003)
OVERALL SATISFACTION	96.1	- 1.1	98.8% (2015)	95.2% (2018)
Making it easy for customers to do business with	95.7	- 1.0	99.2% (2009 and 2017)	94.7% (2000, 2003, and 2005)
Energy efficiency programs and services	94.8	- 1.4	97.9% (2015)	92.6% (2001)
Concern for the environment	94.8	- 0.5	99.2% (2011)	94.8% (2020)
Planning for the future energy needs of its customers	90.2	- 0.6	96.9% (2011)	88.6% (2018)
Offering rate options that meet customers' needs	90.2	- 2.0	96.9% (2008)	85.8% (2006)
Offering renewable energy/Green Power as an option	90.0	- 2.5	96.0% (2011)	90.0% (2020)
Solar programs and services	89.6	- 4.1	93.7% (2019)	89.6% (2020)
Santee Cooper's rates compared to other products and services	88.9	- 3.2	97.3% (2008)	88.9% (2020)
Keeping rates as low as possible	87.0	+ 0.2	91.6% (2007)	81.7% (2010)

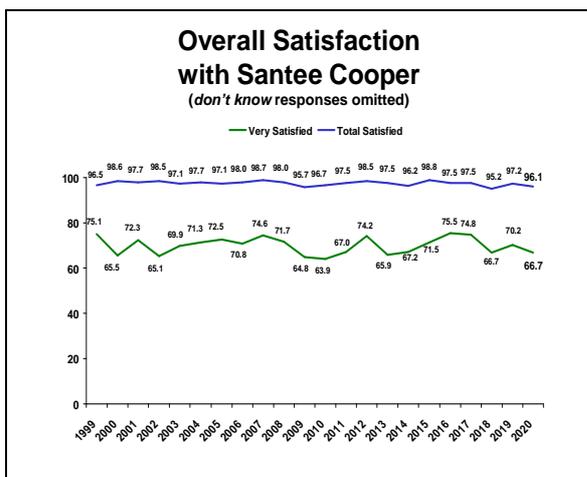
Detailed Study Findings

Satisfaction with Santee Cooper

- Overall Satisfaction.** Overall Satisfaction among commercial customers is 96.1% this year, with 66.7% indicating they are *very satisfied*. (Q2)



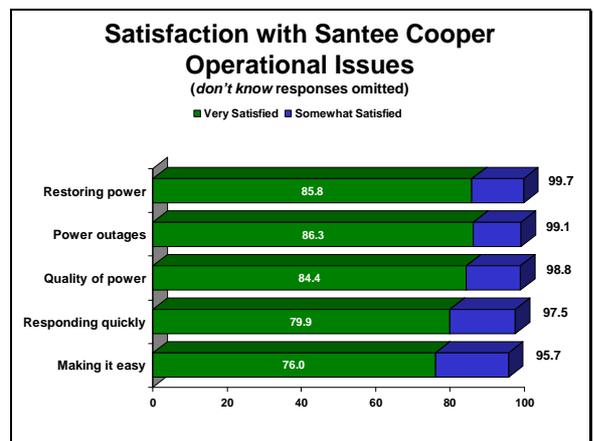
Overall Satisfaction has been consistently high over time. This year's levels are down slightly, but within sampling error (not statistically significant).



Among the 13 respondents who indicate they are dissatisfied, reasons given relate primarily to perceptions of higher bills (7 respondents), the cost of the VC Summer plant being passed on to customers (3 respondents), and lack of renewables/green energy (3 respondents).

- Operational Issues.** Satisfaction with Santee Cooper continues to be very high when it comes to operational and customer service issues, including: *restoring power as quickly as possible after an interruption (99.7%), keeping power outages to a minimum (99.1%), quality of electric power provided (98.8%), responding quickly to customer questions and problems (97.5%), and making it easy to do business with (95.7%).* (Qs 1c, d, e, f and g)

The vast majority of commercial customers indicate they are *very satisfied* with Santee Cooper on these dimensions.

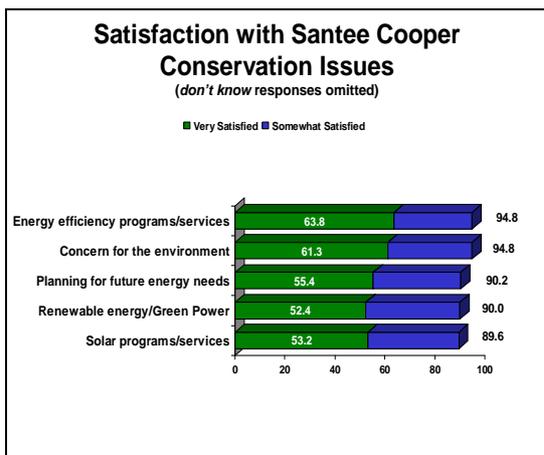


These levels are generally consistent with last year and over time (see page 2).

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- Conservation Issues.** On average, more than one out of four (28.8%) commercial customers indicates they *don't know* enough about **Santee Cooper's** conservation and energy efficiency programs to say whether they're satisfied or not.

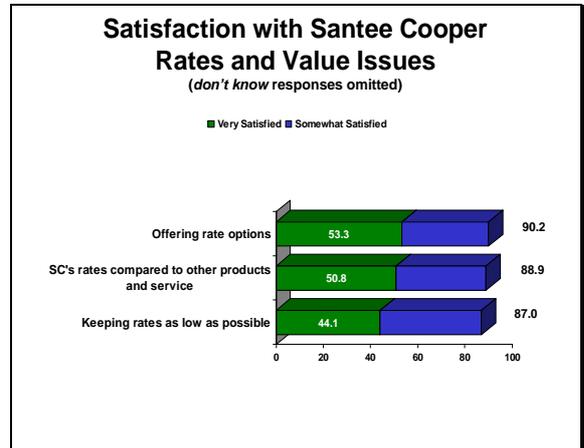
Among those with an impression, however, more than nine out of ten are satisfied with **Santee Cooper's** energy efficiency programs and services (94.8%), concern for the environment (94.8%), planning for the future energy needs of its customers (90.2%), offering renewable energy/ Green Power as an option (90.0%), and solar programs and services (89.6%). (Qs 1h, i, j, l and m)



Satisfaction levels relative to conservation issues have not changed significantly over time and are consistently quite high. This year, however, three out of five measures are at new all-time lows (see page 2).

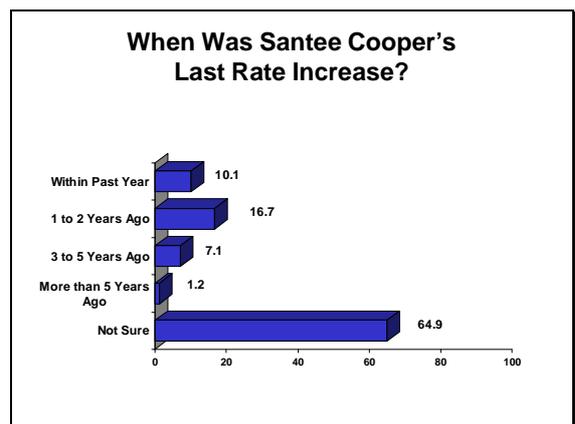
- Rate Issues.** For the most part, commercial customers continue to be satisfied with **Santee Cooper** when it comes to rates and value, including: offering rate options that meet customers' needs (90.2%), rates

compared to other products and services (88.9%), and keeping rates as low as possible (87.0%). (Qs a, b and k)



Two of these three measures are down moderately but within sampling error (see page 2).

- The vast majority (64.9%) of commercial customers say they *don't know* when **Santee Cooper** had a rate increase last and an additional 8.3% believe it was more than three years ago. (Q6)



Findings identify a general correlation between the level of satisfaction and how recently these customers believe **Santee Cooper** had a rate increase.

- 20% of those who are *very satisfied* with **Santee Cooper** overall say the last rate increase was within the past two years;
- 32% of those who are *somewhat satisfied* overall say the last rate increase was within the past two years; and
- 40% of those who are *dissatisfied* overall say the last rate increase was within the past two years.

Awareness of/Interest In Energy Efficiency Rebate and Incentive Programs

- **Familiarity with Rebate Programs.** Familiarity with **Santee Cooper** rebate programs continues to be somewhat limited among commercial customers. Still, findings suggest some growth in awareness, particularly for rooftop solar rebates.
 - 35.1% are *familiar* with **Santee Cooper’s** energy efficiency rebate programs in general, up by 1.4 percentage points from last year (Q7);
 - 25.6% are *familiar* with the utility’s rooftop solar rebate programs, up significantly (by 15.0 percentage points) from 10.6% last year (Q9a); and
 - 17.3% are *familiar* with community solar rebate programs, consistent with last year’s level of 17.2% (Q9b).

Among GA code commercial customers, 26.4% say they are *familiar* with **Santee Cooper’s** Small Business Energy Saver Program, including a free energy assessment and installation of new

lighting or refrigeration equipment. This is a new measure this year. (Q9c)

- Among those *familiar* with one or more of **Santee Cooper’s** commercial energy programs, most heard about the programs via a *bill insert/mail*. **Santee Cooper** representatives have also been a strong resource relative to *energy efficiency rebates* in general and the *Small Business Energy Saver Program*; *Facebook/other social media* is the top secondary source of information on solar rebate programs. (Qs 8a,10a, 10b, 10c)

Where Did You Learn About Santee Cooper’s Energy Programs? (among those aware)				
	Energy Efficiency Rebates (n=118)	Rooftop Solar Rebates (n=86)	Comm. Solar Rebates (n=58)	Small Bus. Prog. (n=72)
Bill insert/mail	37%	30%	33%	38%
SC rep	19	10	10	35
Contractor /trade ally	18	15	12	11
FB/social media	5	20	17	6
SC website	14	12	14	8
Other	11	16	19	10
Don't know	4	2	7	1

- **Interest in Prospective Business Incentive Programs.** Respondents were asked about their possible interest in three (3) prospective business incentive programs. While findings do not identify overwhelming interest in any of the programs, there is interest among a significant minority of commercial customers that may represent sufficient opportunities for additional consideration.

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Specific incentive programs evaluated:

1) A new program that would incentivize businesses for allowing **Santee Cooper** to manage their HVAC and/or water heaters during high usage times for periods up to 4 hours at a time with the opportunity to opt out of a specific event is desired: 25.3% *interested* (down from 37.4% for HVAC and 30.2% for water heaters last year), 4.2% *very interested* (down from 10.2% for HVAC and 8.0% for water heaters last year) (Q11a);

2) A new program that offers incentives to businesses for installing electric vehicle charging stations on their premises: 21.1% *interested* (down by 1.7 percentage points from last year), 8.9% *very interested* (Q8b); and

3) A “Leased Generator Program” for leasing a standby generator and making payments along with the **Santee Cooper** bill for electricity: 16.7% *interested*, 4.8% *very interested* (Q11b).

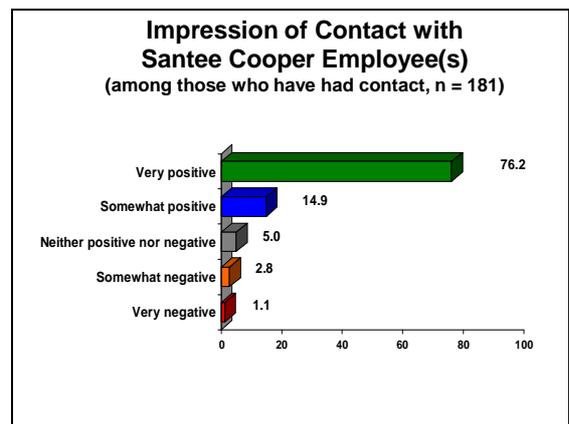
Contact and Satisfaction with Santee Cooper Employees

- **Incidence of Contact.** Overall, 53.8% of study respondents indicate they have had some type of personal contact with **Santee Cooper** during the past year – 35.1% have had contact by phone, 11.9% have visited an office, and 21.7% have had some other type of personal contact, such as seeing a representative, lineman, meter reader or service technician on-site. (Q3)



Incidence of contact has been reasonably consistent over time.

- **Evaluation of Contact Experience.** Among the 181 commercial customers who have had contact with **Santee Cooper** within the past year, 91.1% say their experience was *positive* (consistent with last year), with 76.2% describing the encounter as *very positive* (down moderately from 79.3% last year) (Q4)



Positive experiences relate primarily to: (Q5)

- ✓ Good customer service (38%);
- ✓ Prompt response (29%);
- ✓ Being knowledgeable/informative (29%); and
- ✓ Helpfulness (22%).

Negative experiences relate primarily to unsatisfactory service (5%), not being able to address the issue (3%), and/or slow response time (3%).

Impacts of COVID-19

- **Impact of COVID on Operations.** More than half (56%) of **Santee Cooper's** commercial customers indicate their operations were/have been impacted by COVID-19. (Q12a)
 - 11% had staff working from home rather than the office;
 - 18% reduced staff and/or hours of operation;
 - 24% temporarily suspended operations; and
 - 2% permanently closed operations.

In addition, as many as 104 had messages on their phones that they had closed their business and were, therefore, not included in study results.

Approximately 43% say they generally maintained regular operations.

- **Financial Impacts of COVID on Commercial Customers.** Fully four out of five commercial customers (80%) indicate they have experienced financial losses due to COVID-19 – 32% *significant financial losses*, 27%

moderate financial losses, and 21% *mild financial losses*. (Q12b)

- **Expectations for Returning to Normal.** Despite these impacts, most businesses feel reasonably confident that operations will return to normal. (Q12c)

Fully 78.5% of commercial customers represented in the study have at least moderate confidence that things will get back to normal within three months; 86.6% are confident they will be back to normal within six months; and 90.8% are confident they will be back to normal within a year.

- **Response to Potential COVID Assistance Programs from Santee Cooper.** Findings identify interest among some commercial customers in programs and services that might be offered by **Santee Cooper** to help businesses with the impacts of COVID-19. Those perceived to help the most include: (Q12d)
 - *rebates on energy-efficient upgrades like lighting, commercial refrigeration and kitchen equipment, and/or HVAC improvements* (15%);
 - *energy-saving tips* (10%);
 - *in-person visits with an Energy Advisor* (10%);
 - *Budget Billing* (8%); and
 - *payment plans* (6%).

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Study Specifications and Respondent Profile

- **Methodology.** Between 2000 and 2007 the study was conducted by mail. Between 2008 and 2019 (as well as in 1999), data for the study were collected via telephone interviews. This year, an online element was added as well to extend reach and allow all commercial customers the opportunity to participate in the study.

Data collection this year was conducted between May 18 and June 7 (telephone interviews were conducted between May 18 and 29). It should be noted that the COVID-19 health crisis started in March of 2020, causing many commercial businesses to be closed and/or their traditional operations to be modified for a period of time between March and May.

- **Sample Size and Sampling Error.** Traditionally, this study has a sample size of 400. From the universe of 5413 South Carolina-based commercial customers, we were only able to complete telephone interviews with 336 this year (still statistically reliable). An additional 93 commercial customers completed the survey online.

As already indicated, the results presented within this report reflect information collected via phone interviews only to allow for comparability with results from previous years. Results comparing telephone and online respondents are provided in a separate document.

Sampling error for the telephone portion of this study is ± 5.1 percentage points at the 95% confidence level.

- **Respondent Rate Code Mix.** Respondents reflect a mix of Santee Cooper's commercial customer account codes, including:

- ✓ GA (including GA/GN/GW) - 81% of respondents;
- ✓ GB - 18% of respondents; and
- ✓ TA – 1% of respondents.

There were no respondents from the GV, GL/GL-12/GL-N, GT, or GENPGR rate codes this year.

- **Respondent Position/Role in the Organization.** For the most part, study respondents are actively involved with day-to-day business functions and operations. Most are owners/presidents (37.2%) or office managers (15.5%). (Q14)
- **Type of Business.** Findings also identify a broad mix of business types, led by professional services (17.3%), retail (13.7%), hospitality (11.3%), restaurant (11.0%), medical (7.1%) and financial services (6.2%). (Q13)