



Consumer Survey Results

**NAVIGATOR**

Independent Electricity System Operator

March 20, 2017

# Overview

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- What Navigator did
- Top line findings
- Numbers of note
- Questions



## What we did

# 2006 Customer Survey Process

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- Navigator, together with the IESO, developed a “Discussion Guide” for use by the moderator in the interview process
- Survey employed a mixture of quantitative and qualitative methods
- We conducted 68 one-on-one phone interviews with your customers
  - Navigator senior consultants complete these interviews directly, we did not use a call centre.



## What we found

# Top line findings

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- The IESO remains a leader in the energy sector in Ontario
- Continued strong customer satisfaction in the majority of service areas and core mandates
- Customers have a high degree of confidence in IESO reliability and system operations
- Top marks for customer service and communications products

# Top line findings

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- Emergence of other Ontario energy entities have not changed IESO leadership status, as of yet
- We did hear, however, that many customers are concerned about “overlapping mandates” between IESO and OPA
  - Industry not sure who does what and why both are needed.
- Stakeholder engagement process lags behind other rankings as does the rule making process
  - Two items closely linked by respondents

# Top line findings

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- We heard concerns regarding SAC and the solicitation of input from stakeholders they are representing.
- Direct contact between customers and account managers is low
  - However, those who are in direct contact have high opinions of the account managers
  - To be fair, we understand there are only 5 Account Managers for 300+ customers

# Top line findings

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- Different types of customers are motivated by vastly different issues and means of communications
- We heard considerable backlash on the amount of e-mails and the utility of them
  - We understand that a new IESO Weekly Update has been added during the survey period to address this issue

# Top line findings

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- Smart Meters and data collection are major concerns for distributors
  - Other groups not concerned
  - IESO has high reputational risk on the MDM/R process
- Reputational risk to IESO
  - LDCs will hold IESO responsible for any shortcomings

# Top line findings

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- Industry wants a focus for the industry and the IESO is well positioned to provide it
  - Currently, IESO enjoys the most favourable leadership position
  - Technical experts, high level of trust and approval.
- While customers want a leader, they are split on IESO advocacy for the sector

# Top line findings

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- Predictably, customers are frustrated by the administrative burden imposed on them
- Customers of all types feel the IESO administrative processes too cumbersome
  - We heard complaints about duplication of efforts, slow turn around time, and administrative difficulties.
- In addition, customers are unsure why some of the administrative process are necessary
- Respondents felt that the reduction in fees last year did not go far enough.
  - Fee reduction was not as positive with the industry as envisioned

# Top line findings

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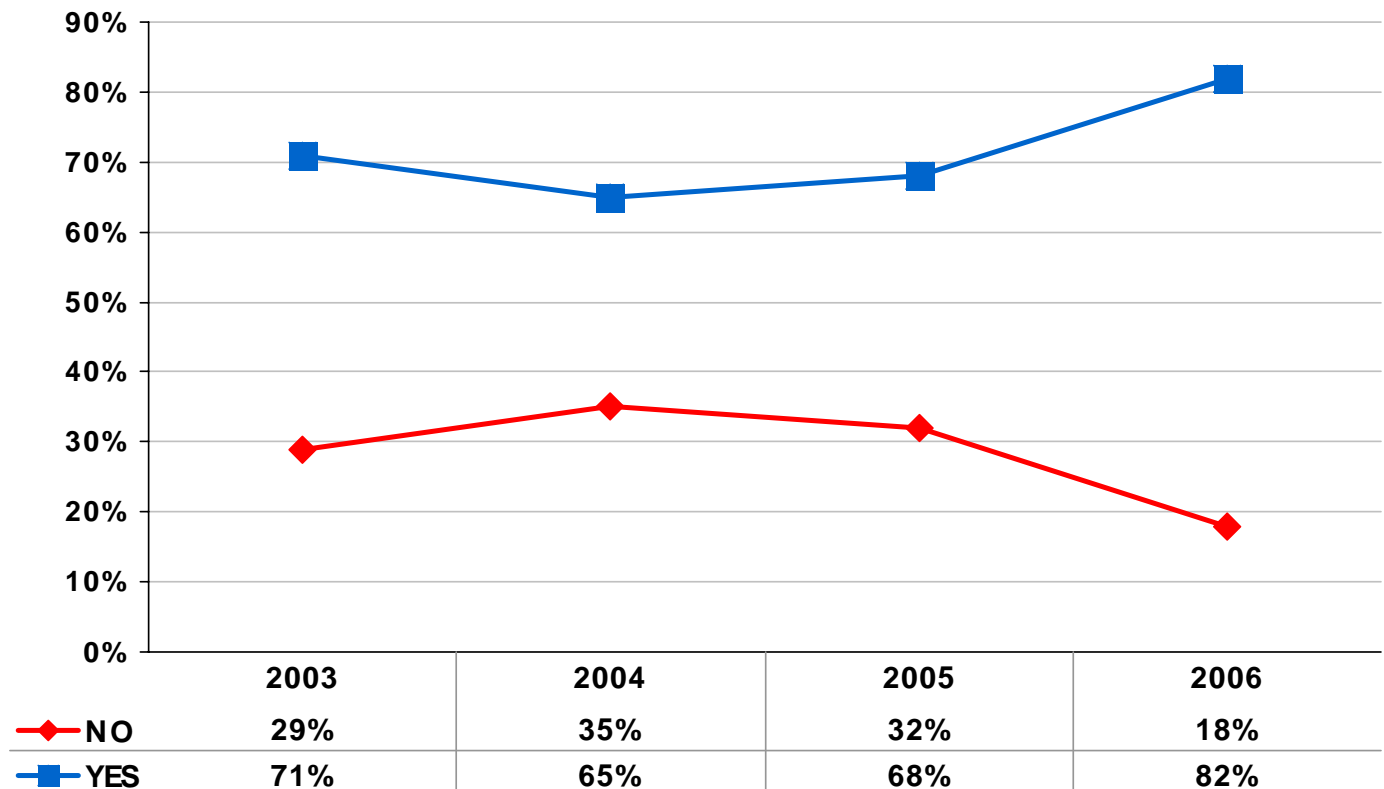
- Government as a whole, not politicians specifically, are seen as too involved in sector
  - Adds to a feeling among customers of a lack of vision for the sector.
  - The sector is desperate for a leader other than government
- Board of Directors and Senior Management of the IESO are not well known by the customers
  - Those who do know you, rank their confidence in you positively.
- Changes in the leadership of the IESO are viewed positively



## Numbers of note

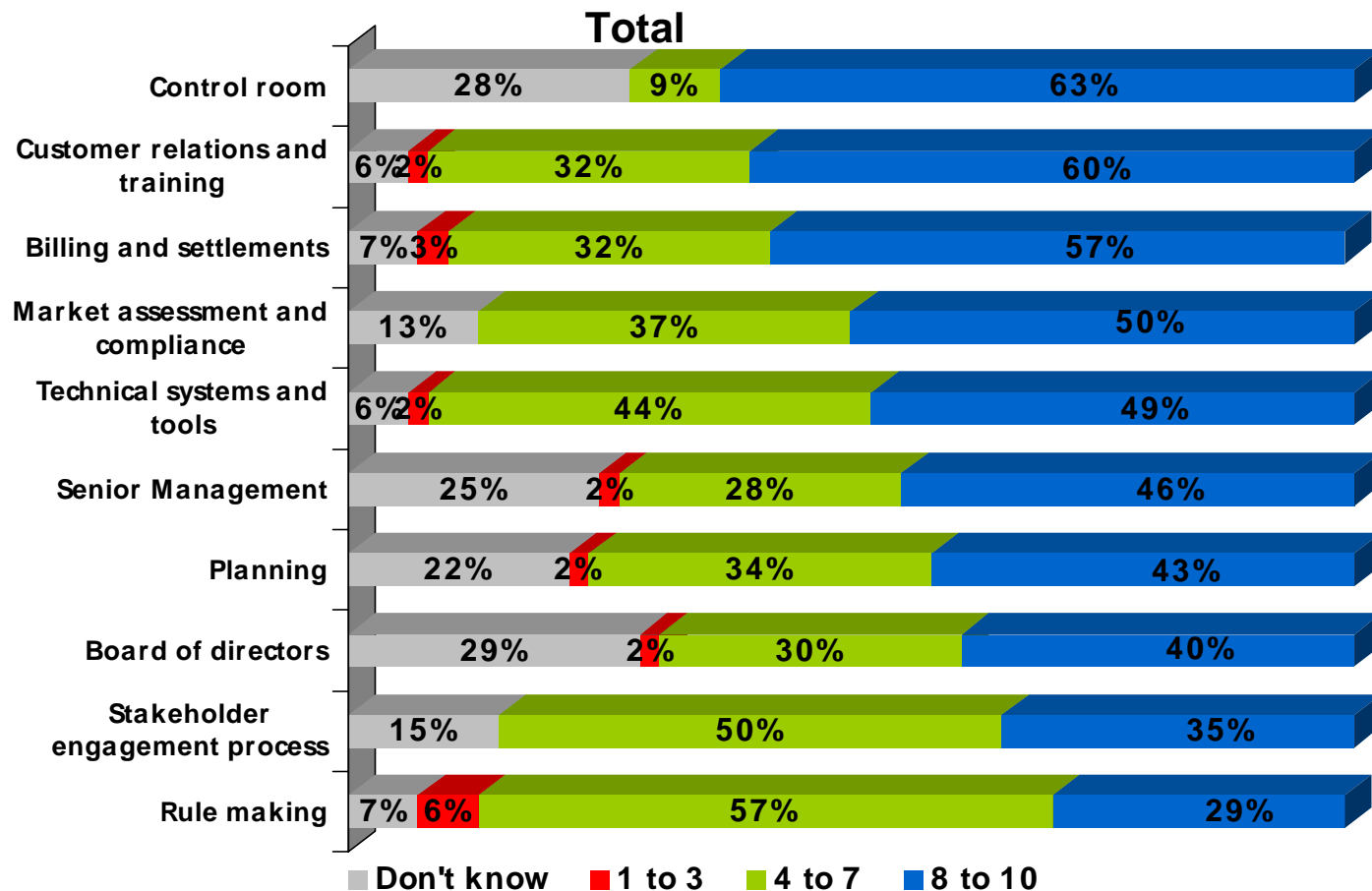
# Are you a customer of the IESO?

As you know, I'm calling as part of a customer survey for the IESO, do you consider yourself to be a customer of the IESO?



# Confidence in the IESO

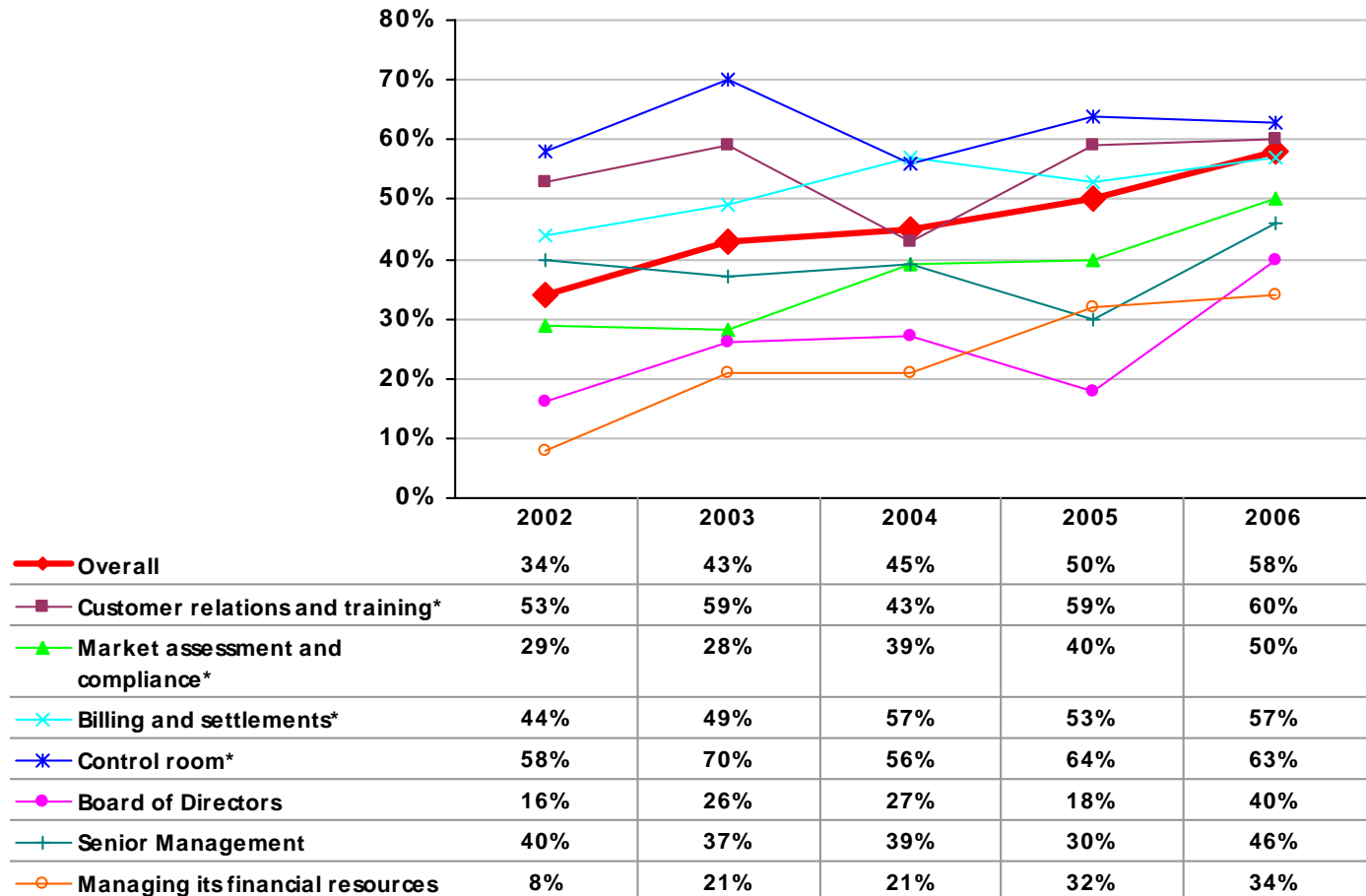
Now, I would like to ask you to again use a 10 point scale to indicate your level of confidence in different groups within the IESO to operate and oversee the market. This time 1 will be not at all confident and 10 will be complete confidence.



# Historical confidence

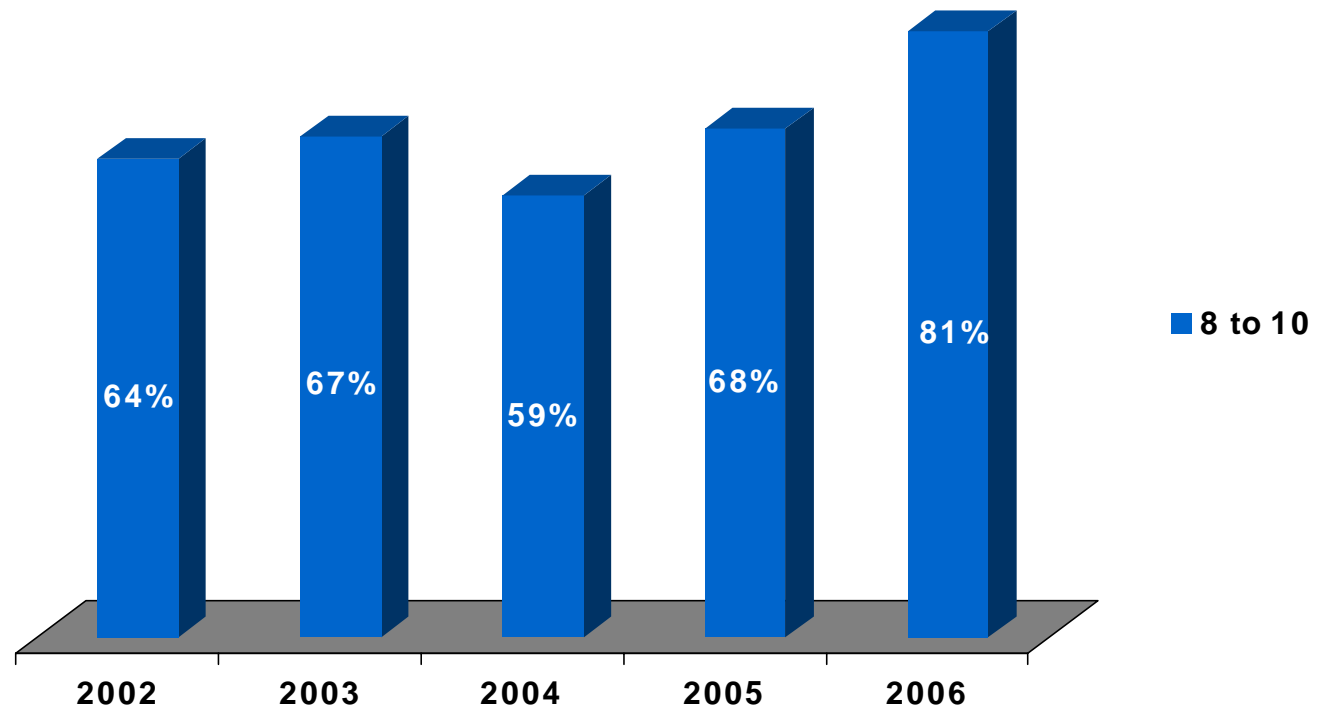
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## Historical confidence



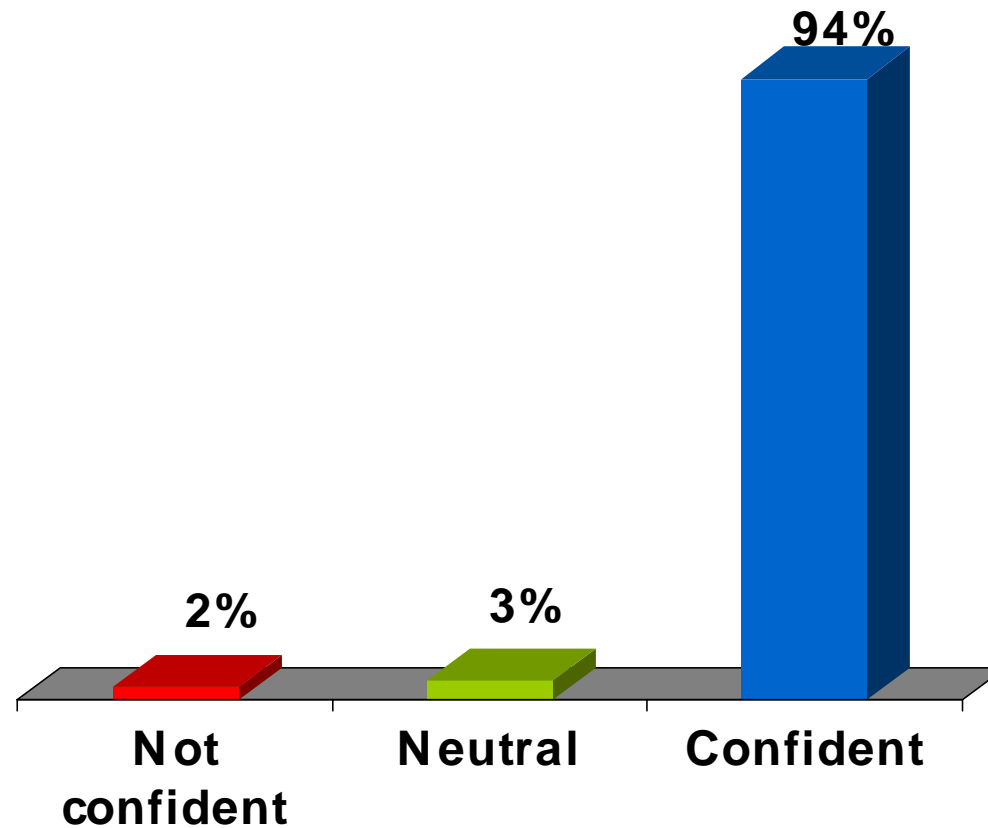
# Performance on supply and delivery

Now that we have discussed the various groups within the IESO, I would now like you to rate the performance on some of the current services provided by the IESO.



# Confidence in reliability

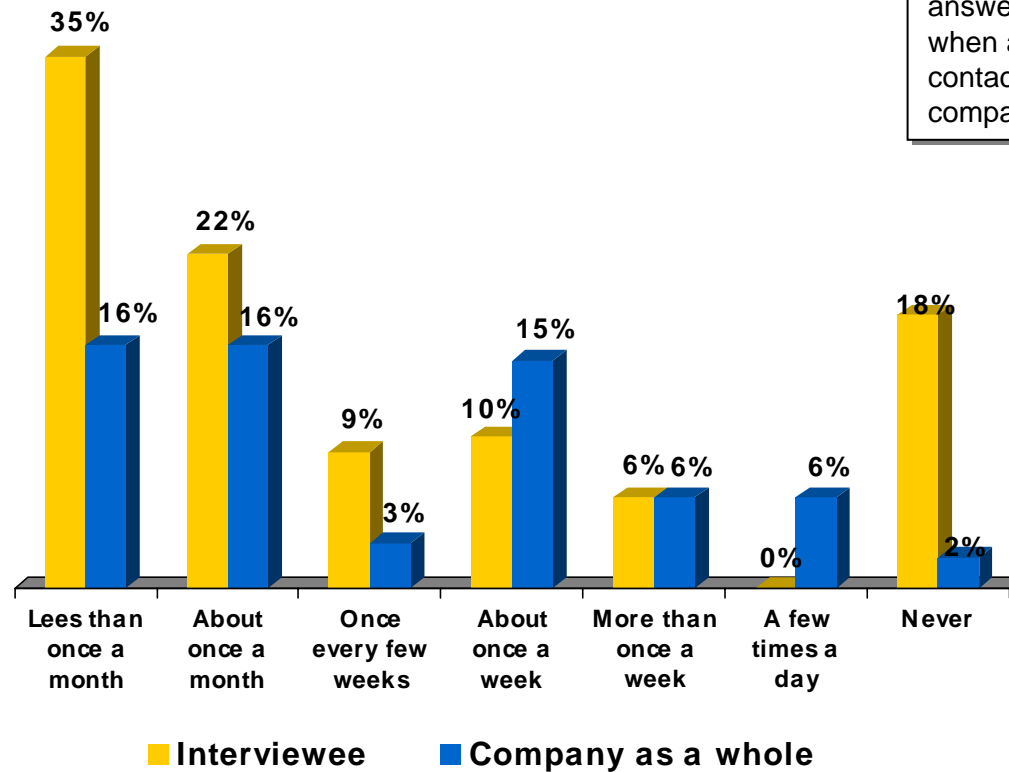
Overall, would you say that you are very confident, somewhat confident, neutral, not very confident, or not at all confident in the IESO's handling of its critical role of reliability?



# Account manager contact

How often are you in direct contact with your account manager at the IESO?

Do you know how that would compare to how often your company as a whole is in direct contact with them?



37% of respondents answered "Do not know" when asked how their contact compares to the company as a whole.



Questions?