



**Annual
Customer Survey Report – 2016**

Prepared by:



For:



December 2016

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METHODOLOGY & LOGISTICS

OVERVIEW

- This report represents the findings from a December 2016 customer satisfaction survey of Greater Sudbury Hydro (GSH) customers conducted by Oraclepoll Research Limited for the LDC. The results in this report are compared with the survey data that was first benchmarked in December 2013, then tracked in December 2014 and December 2015 by Oraclepoll. In each of these survey waves there was an n=400 residential customer sample segment and an n=100 business component.
- Within this report, there are the findings from the December 2016 survey of GSH residential and business customers. Where applicable and possible the results are compared to the previous survey waves. This report includes an Executive summary for each of the Residential and Business components and a Result by Question section for each of these two segments.

STUDY SAMPLE

- Greater Sudbury Hydro provided Oraclepoll with a database of their residential and business customers to be surveyed. A total of n=400 residential customers and n=100 of GSH business customers were randomly selected from the database and surveyed by telephone using person to person live telephone interviewing.
- Respondents were screened to ensure that they were 18 years of age or older and were one of the persons either at the business or residence that was responsible for making decisions related to their electricity usage including bill payments.

SURVEY METHOD

- The survey was conducted using computer-assisted techniques of telephone interviewing (CATI) and random number selection. A total of 20% of all interviews were monitored and the management of Oraclepoll Research Limited supervised 100%.

LOGISTICS

- Interviews were completed between the days of December 12th to December 21st 2016.
- Initial calls for the residential component were made between the hours of 5 p.m. and 9 p.m. Subsequent call backs of no-answers and busy numbers were made on a (staggered) daily rotating basis up to 5 times (from 10 a.m. to 9 p.m.) until contact was made. In addition, telephone interview appointments were attempted with those respondents unable to complete the survey at the time of contact. At least one attempt was made to contact respondents on a weekend.
- Calls to business customers were first made from 8:30 a.m. to 5:30 p.m. during weekdays. There was at least one follow up call after 5:30 p.m. and one on a weekend. In addition, telephone appointments were accepted and made as per the respondent's time preference.

CONFIDENCE

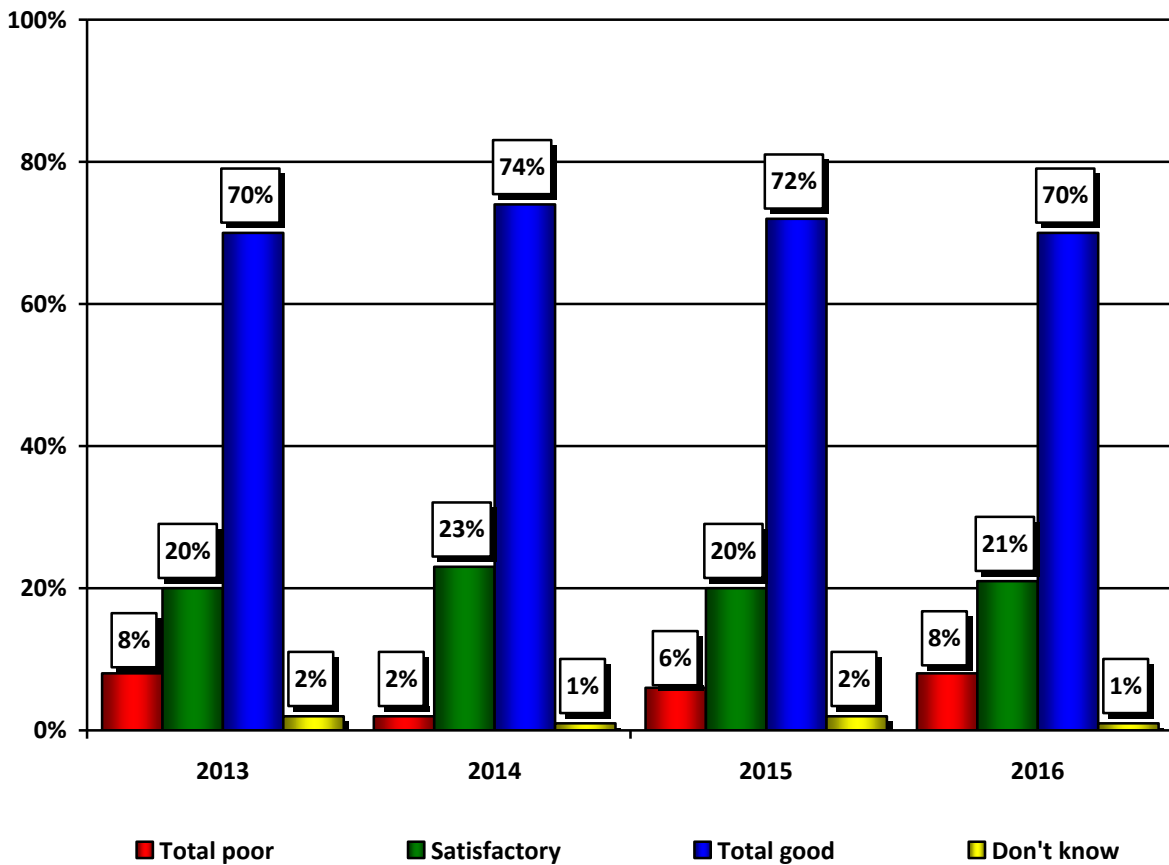
- The margin of error for the N=400 person residential survey is $\pm 4.9\%$, 19/20 times and $\pm 9.8\%$, 19/20 times for the sample of N=100 businesses.

EXECUTIVE SUMMARY-RESIDENTIAL

SATISFACTION

Respondents were first asked the following overall satisfaction question. The following graph compares the December 2016 results with the previous three surveys.

Q1. "Considering all aspects of being a customer of Greater Sudbury Hydro, how would you rate your overall satisfaction with the company as your electrical services provider?"



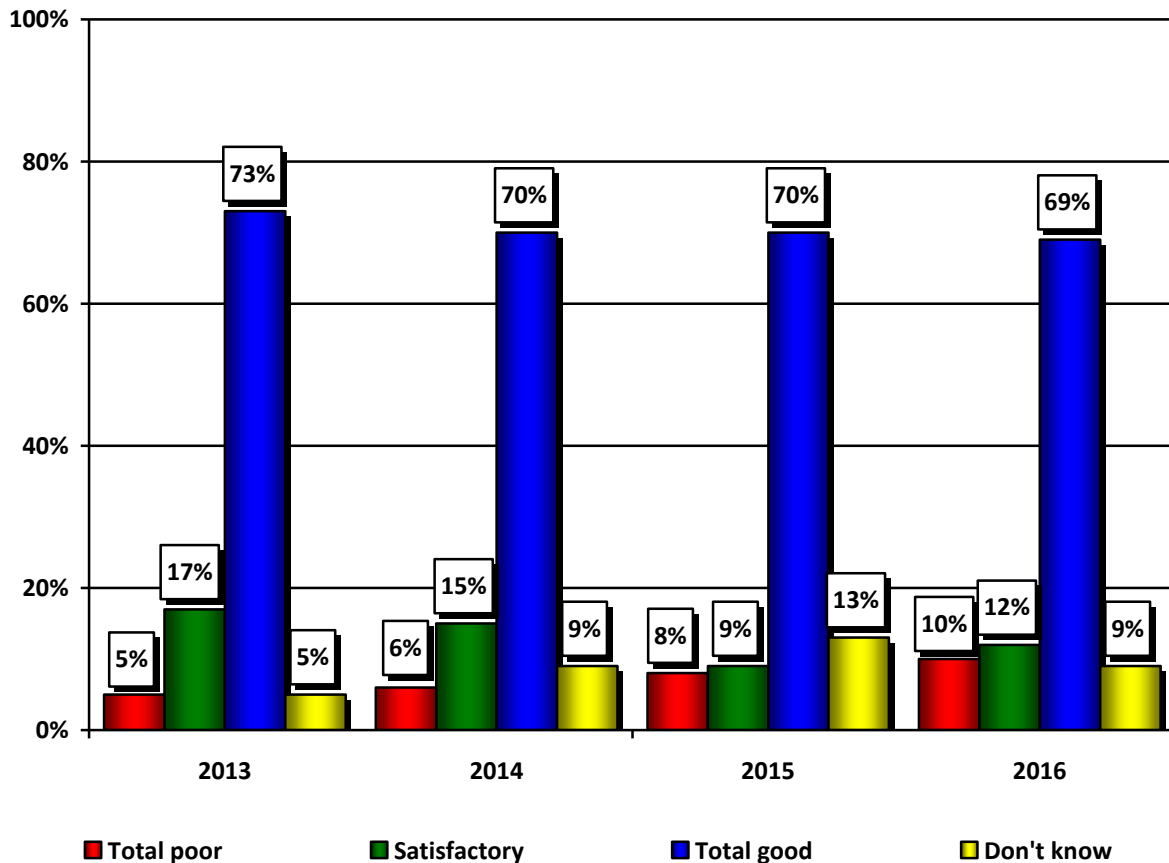
Seven in ten or 70% of customers surveyed were satisfied with GSH as their electrical service provider according responses of good (29%) and very good (41%), compared to the total poor response of 8%, while 21% had a neutral or satisfactory opinion. Results are consistent over the four-year period although there were slight increases in the neutral (satisfactory) and poor score at the expense of the total good and do not know responses.

Customers from the highest income earning households (\$100,000 or more) were most satisfied (77%), in relation to those earning \$99,000-\$75,000 (67%), \$74,999-\$50,000 (66%) and under \$50,000 (67%) per annum.

CUSTOMER SERVICE

Next residential customers were asked the following comparative service question, rating GSH's service against other providers.

Q2. "How would you rate Greater Sudbury Hydro's customer service (i.e. being responsible and reliable) compared to other service providers such as your heating fuel, Telephone Company or your cable TV or satellite provider?"



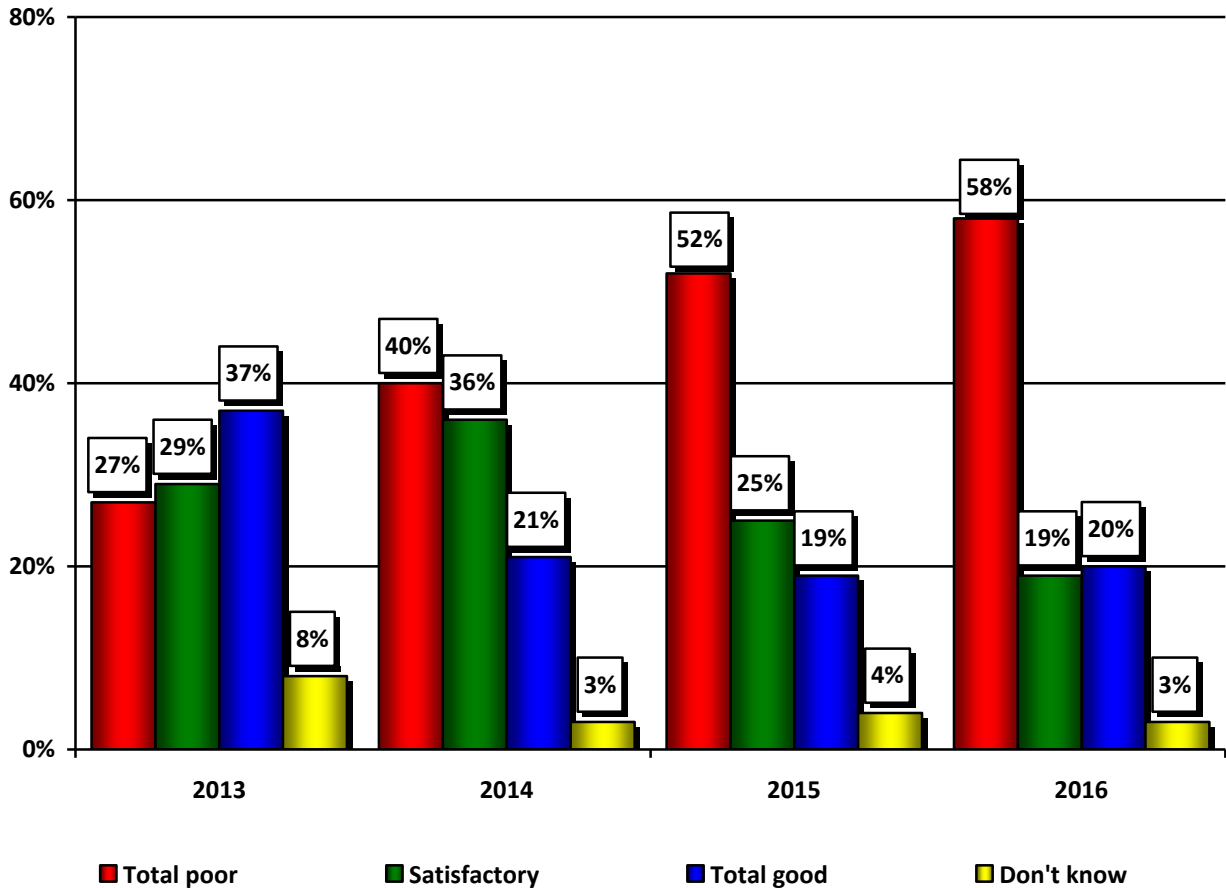
The comparative service ratings total positive score of good (34%) and very good (35%) is 69% marginally lower by 1% compared to 2015. While the percentage of undecided's (don't know) fell by 4% over 2015, there were modest rises in the poor or very poor score to 10% (+2%) and in the neutral or satisfactory rating of 12% (+3%).

The highest income earners (\$100,000+) were most satisfied in this area (80%), compared to those in lower earning cohorts including under \$100,000-\$75,000 (65%), under \$75,000-\$50,000 (65%) and under \$50,000 (67%) per annum. More females (77%) provided good or very good scores in relation to males (61%). Younger customers 18-34 (56%) also provided a lower combined good or very good rating (56%) in relation to those 35-54 (64%) and 55 or older (83%).

PRICE COMPARISON

A comparative price question was then asked comparing GSH to other essential services.

Q3. "How would you rate your satisfaction with the price you pay for electricity compared to what you pay for other (essential) services in your area (heating fuel, telephone company or your cable TV and satellite provider)?"



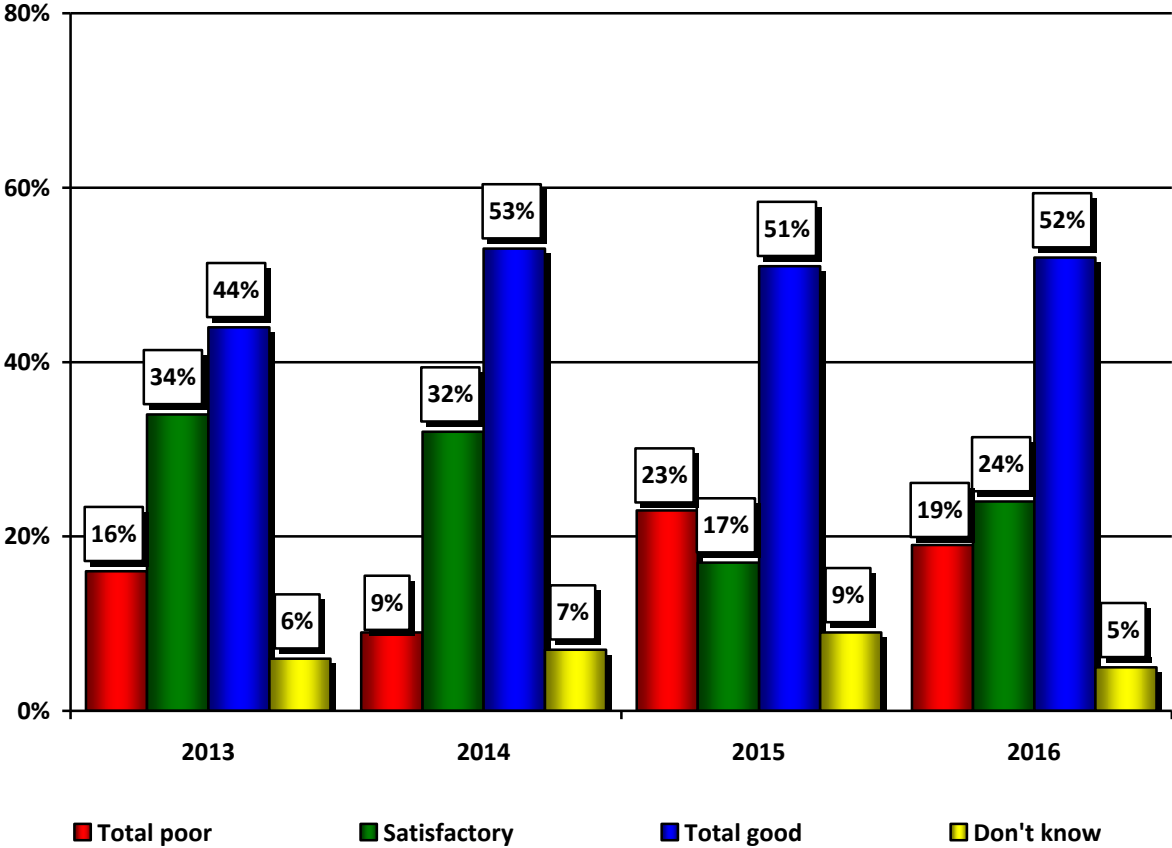
More customers in this survey period and in growing numbers compared to previous years are dissatisfied with the cost of electricity in relation to other services. While the good and very good score has remained stable over the past three survey periods at 20% (19% in 2015 & 21% in 2014) there was an increase in the poor or very poor rating to 58% (+6%) from 52% in 2015 and 40% in 2014. The neutral or satisfactory rating also fell 6% from last year to 19%, while the number of undecided responses has stayed consistent at 3%.

Dissatisfaction or the highest poor or very poor ratings were provided by younger residents 18-34 (75%) and 35-54 (59%) as well as those earning under \$75,000-\$50,000 (69%) and among more females (61%) compared to males (54%).

OVERALL VALUE

Customers also rated the overall value that Greater Sudbury Hydro provides.

Q4. "Using the same scale from one very poor to five very good, how would you rate the overall value that Greater Sudbury Hydro provides?"



With respect to the overall value that GSH provides, the positive or good and very good rating has been consistent in the last three survey periods and is currently at 52% (+1% versus 2015). There was a -4% drop in the poor or very poor score to 19% and a -4% decrease in the percentage of those that did not know to 5%, while there was a corresponding rise in the satisfactory or neutral category to 24% (+7%).

Results reveal that the youngest and lowest earners were most dissatisfied, with 38% of those 18-34 providing a poor or very poor rating as were 27% of customers earning under \$50,000 per annum.

RATING GREATER SUDBURY HYDRO

Respondents were then asked to rate their level of agreement with a series of descriptive statements about Greater Sudbury Hydro. The table below combines the responses of agree and strongly agree and compares the results over time.

“I am now going to read some brief statements that may be used to describe Greater Sudbury Hydro. Using a scale from one strongly disagree to five strongly agree, please respond to each statement after it is read.”

STATEMENTS – TOTAL AGREE (Somewhat & Strongly)	2013	2014	2015	2016
Q7. Greater Sudbury Hydro meets its commitment to customers.	80%	76%	75%	73%
Q5. Greater Sudbury Hydro provides customers with reliable and good service.	77%	75%	73%	72%
Q11. Greater Sudbury Hydro encourages efficient use of electricity among its customers.	62%	72%	74%	71%
Q8. GSH provides its customers with information about programs to help customers reduce their energy costs.	58%	71%	61%	59%
Q9. Greater Sudbury Hydro is concerned about public safety and safe work practices.	48%	63%	54%	60%
Q10. Greater Sudbury Hydro invests in and gives back to the community	22%	28%	26%	30%
Q6. Greater Sudbury Hydro is committed to effectively managing a balanced budget.	25%	33%	32%	29%

Respondents rated Greater Sudbury Hydro highest in terms of agreement at 73% for meeting its commitment to customers, slightly lower (-2%) compared to 2015, next followed by providing reliable and good service at 72% (-1% in relation to 2015) and for encouraging the efficient use of electricity at 71% (-3% over 2015). The next strongest rated agreement area was for GSH providing customers with information about programs to reduce energy costs (59%) which dipped -2% and for being concerned about public safety and safe work practises at 60%, which saw a positive gain of +6%, but 29% answered do not know to the safety indicator. The lowest agreement ratings continue to be for investing in and giving back to the community (30%) although there was a +4% increase compared to 2015 and for effectively managing a balanced budget (29%). A significant percentage of customers were unsure as to how to rate these last two items as evidenced by the sizeable responses of do not know (43% and 35% respectively).

RATING PERFORMANCE

Respondents were then asked to rate the performance of Greater Sudbury Hydro across four indicators. The table below combines the positive responses of good and very good while tracking the results over time.

“Using a scale from one very poor to five very good, please rate the performance of Greater Sudbury Hydro in each of the following areas.”

PERFORMANCE RATING (Good & Very Good)	2013	2014	2015	2016
Q12. The reliability of power supply	83%	92%	90%	88%
Q13. Prompt responses to power outages when they occur	72%	82%	81%	84%
Q15. Effectively communicating with customers about planned power interruptions in your area	55%	56%	68%	66%
Q14. Effectively scheduling planned power outages	57%	54%	66%	64%

The highest rated indicator continues to be for the reliability of the power supply at 88% consistent with 2015 although down somewhat (-2%), closely followed by providing a prompt response to outages at 84% which increased compared to 2015 by +3%. In total, 66% accorded a good or very good score for communicating about planned power interruptions (-2%) and 64% for effectively scheduling planned power outages (-2%). While the poor or very poor results for communicating (5%) and scheduling planned outages (2%) were low, answers of do not know were elevated for these two areas (23% and 29% respectively).

RATES VS OUTAGES

A question was asked related to the cost customers are willing to pay for electricity in relation to the security of service delivery or keeping the lights on.

Q16. "I am going to ask your opinion on the issue of balancing the price you pay for maintenance and renewal of your local electricity infrastructure with the security of your electricity service delivery or "keeping the lights on". Please respond on a scale from one having the lowest rates possible with regular outages to five having the highest rates possible with no outages – 3 would be a balance between rates and outages."

RATES VERSUS OUTAGE TRADE OFF	2013	2014	2015	2015
1-lowest rates – regular outages	2%	4%	4%	3%
2-low rates – occasional outages	15%	3%	8%	7%
3-neutral – a balance between rates and outages	44%	55%	47%	54%
4-high rates – only a few outages	15%	13%	11%	12%
5-highest rates – no outages	3%	5%	6%	5%
Don't know	22%	21%	24%	19%

GSH customers continue to prefer having a balance between rates and outages with a majority or 54% favouring this option, +7% more than in 2015 and in line with 2014 (55%). A total of 17% claim to want only a few (12%) or no outages (5%) even if it results in high or the highest rates, while only 10% said that regular (3%) or occasional (7%) outages would be acceptable if their rates were low or the lowest. There were 19% of customers that were undecided or did not know, 5% lower compared to 2015.

PAYMENT OPTIONS

Respondents were read a series of five payment options and were asked about their interest in each one. Multiple responses were accepted and the results are tracked in the following table as a function of time.

Q17. "Please tell me if you are interested in each of the following payment methods for your electricity bills?"

INTEREST IN PAYMENT OPTIONS	2013	2014	2015	2016
Online / telephone banking through your financial institution	65%	48%	54%	58%
Equal monthly payment plan	40%	47%	46%	54%
Automatic withdrawal from your bank account	43%	52%	49%	51%
Online at the Sudbury Hydro Website	20%	15%	19%	25%
Payment at the Greater Sudbury Hydro office	23%	10%	13%	12%

The payment method of most interest was online or telephone banking by 58%, a 4% increase over 2015, with interested in this option strongest among those 18-34 (80%). The option of next highest interest was for an equal monthly payment plan by 54%, 8% more in relation to 2015, followed by automatic withdrawal at 51% (+2%). Equal payments most appealed to those 35-54 (60%) and automatic withdrawal to older customers 55+ (55%). While a lesser one-quarter or 25% said that they prefer payment online thorough the GSH website, this is 6% more than in 2014, but interest in payment at the GSH office remains low at 12% (-1%). Younger 18-34 year olds were most inclined to express interest in payment through the website (46%) and the oldest 55+ in making a payment at the GSH office (20%).

Customers that **expressed interest in multiple payment options in Q17 (N=260)**, were then asked a follow-up question **(Q18) about their most preferred method of payment**. One answer was accepted with the top mentions being automatic bank withdrawal (40%) and online telephone banking (38%), while lesser named were equal monthly billing (14%), online through the GSH website (4%) and at the GSH office (4%).

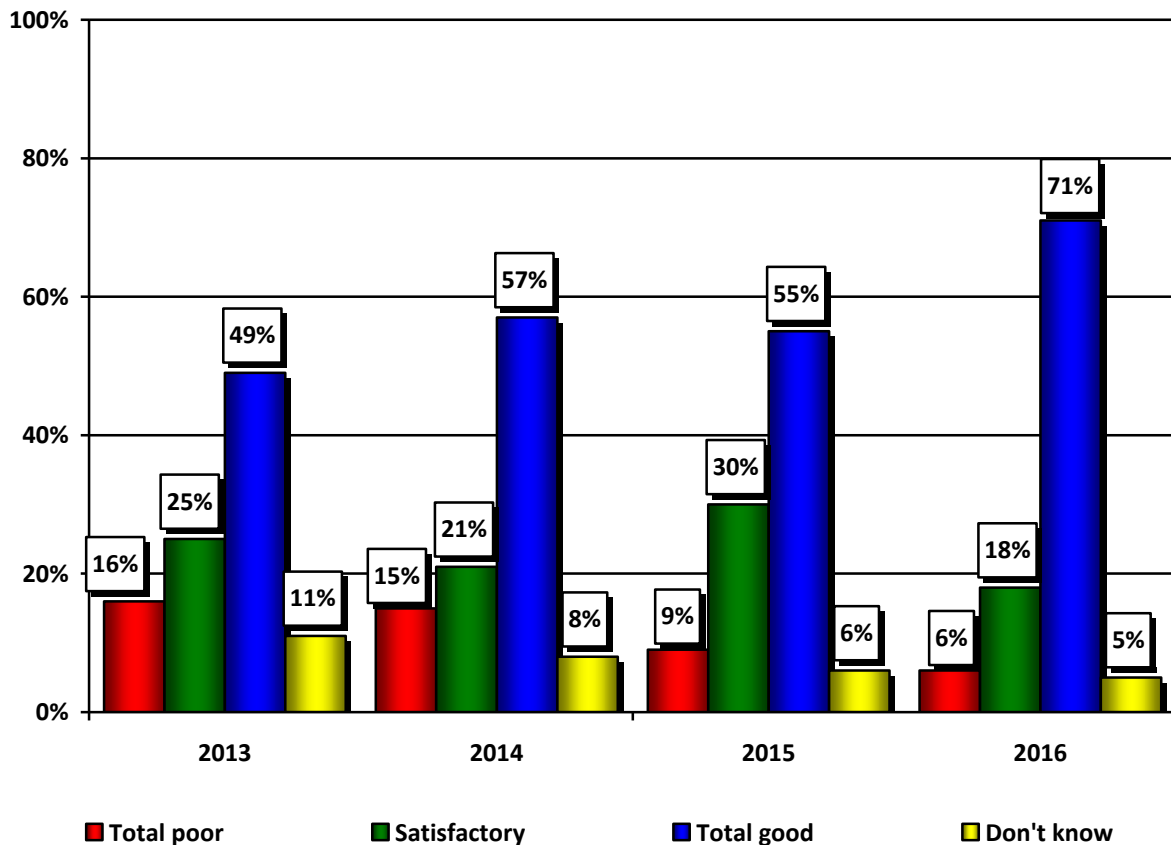
When asked **if they currently receive their hydro bill electronically (Q19)**, two in ten or 20% said that they do, compared to 17% in 2015 and 15% in 2014. Younger customers 18-34 (36%) most get an electronic bill as do higher earners in the under \$100,000-\$75,000 (29%) and \$100,000+ (26%) income ranges.

The 80% (N=320) that do not currently receive an electronic statement were asked if they would be interested in receiving an E-bill (Q20). A total of 24% claimed that they would favour getting an electronic statement (22% in 2015 & 20% in 2014), 74% would not and 2% were unsure.

COMMUNICATION

Customers were asked a series of questions were asked about communications starting with the following overall rating.

Q21. "Greater Sudbury Hydro communicates to its customers through a variety of methods including bill inserts, direct mail, its website, newspapers and radio. Please rate the performance of Greater Sudbury Hydro in communicating with its customers using a scale from one very poor to five very good?"



There was a significant 16% increase in the positive combined good and very good score for overall communications in 2016 (71%) compared with the previous survey period (55%). While the poor and very poor score dipped somewhat (-3%) fewer customers now hold a satisfactory or neutral opinion (-12%). Those in the mid-aged cohort of 35-54 expressed the highest satisfaction (81%) in relation to the youngest 18-34 year olds (65%) and oldest 55+ (68%).

Respondents were asked in an open ended unaided question about their **preferred method to have Greater Sudbury Hydro to communicate information to them (Q22)**. One top of mind response was accepted with the top three mentions including email by 26% (15% in 2015), bill inserts by 25% (29% in 2015) and direct mail by 24% (30% in 2015). Social media was cited by 10% (6% in 2015), the GSH website by 7% (4% in 2015), while lesser named vehicles included radio (3%), a newsletter (2%) and newspapers (1%). There were 3% that did not know or had no preference. 18-34 year olds most preferred emails (44%) and social media (30%), those 35-54 emails (35%) and bill insets (25%), while customers 55+ tend to favour direct mail (40%) and bill inserts (38%).

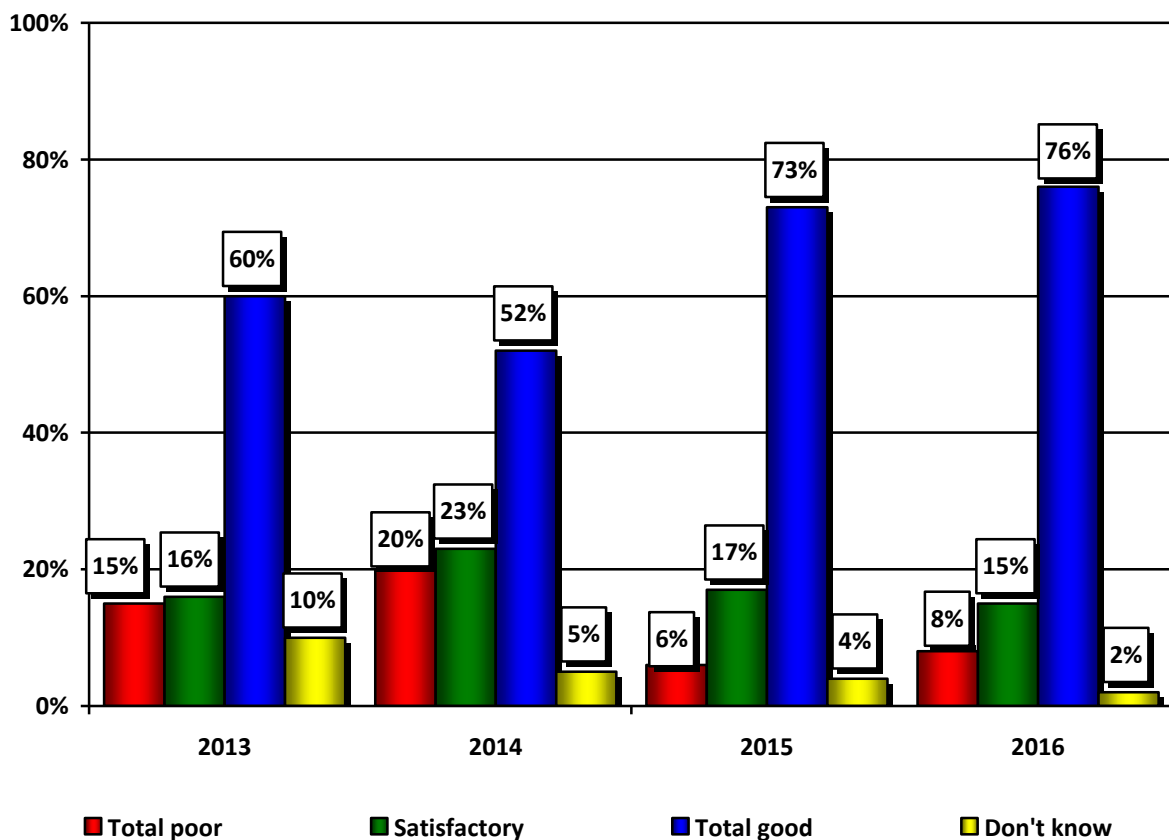
In another open or unaided question, residential customers were asked about **how that they would most like to communicate with GSH (Q23)**. When wanting to initiate communication with GSH, telephone remains the preferred approach by 56% (56% in 2015), followed by email at 22% (20% in 2015), in person at the office by 9% (11% in 2015) and through social media by 8% (5% in 2015). Other methods included through the GSH website (3%) and regular mail (2%). Those 55+ tended to name telephone (60%) and in person visits (20%), 35-54 year olds telephone (66%) and emails (20%), while 18-34 year olds a mix of email (41%), telephone (34%) and social media (21%).

WEBSITE

The questioning then specifically related to the Greater Sudbury Hydro website with customers first being asked if they have **visited the site over the past 12 months (Q24)**. Almost one-third or 32% claimed to have been to the website in the last year, compared to 21% in 2015 and 27% in 2014. Those in the 18-34 (44%) and 35-54 year old cohorts (38%) were most likely to have visited compared to customers 55+ (18%).

The 32% (N=127) that visited the site were then asked three follow up questions on the information that it contains.

Q25. "How would you rate the quality of the information provided on the Greater Sudbury Hydro website?"



More than three-quarters of website visitors or 76% provided a good rating for the information provided, 3% higher compared to 2015 and the strongest rating since baseline data was established in 2013.

In a question allowing for multiple responses, website visitors were also asked **about the information that they were looking for (Q26)**. Account information represented 33% of the N=154 responses, followed by energy conservation (24%) and rates and fees (21%). Other mentions included information about outages (5%), news / developments (5%), contact information (4%), corporate information (4%) and reporting an issue (3%).

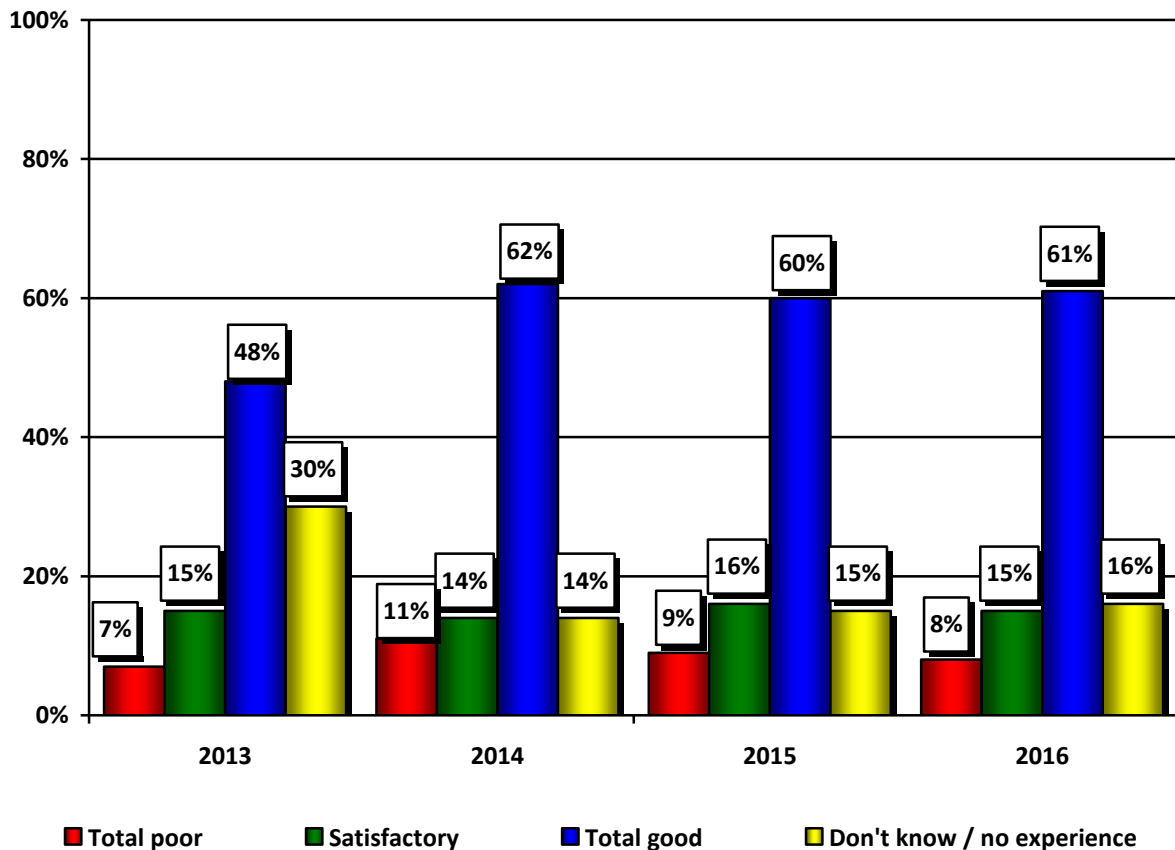
In a final website rating question, visitors (N=127) were asked **if they found the information that they were looking for (Q27)** of which 76% said that they did, compared to 81% in 2015 and 71% in 2014.

All residential respondents (N=400) were then questioned as to whether **they would be interested in managing their GSH account online (Q28)**. In total, 36% of customers would be interested in managing their accounts online (32% in 2015), 62% would not and 2% were unsure. Interest was highest among 18-34 year olds (67%), followed by those 35-54 (40%), but lower among customers 55 or older (13%).

BILL INSERTS / LINKS

Respondents then rated the bill insert or electronic link information provided by Greater Sudbury Hydro.

Q29. "From time to time, Sudbury Hydro attaches information to your bill in the form of a bill insert, or for electronic bill, in the form of a link. Using a scale from one very poor to five very good, how would you rate the overall quality of each of the bill inserts and other printed material you have received from Greater Sudbury Hydro?"

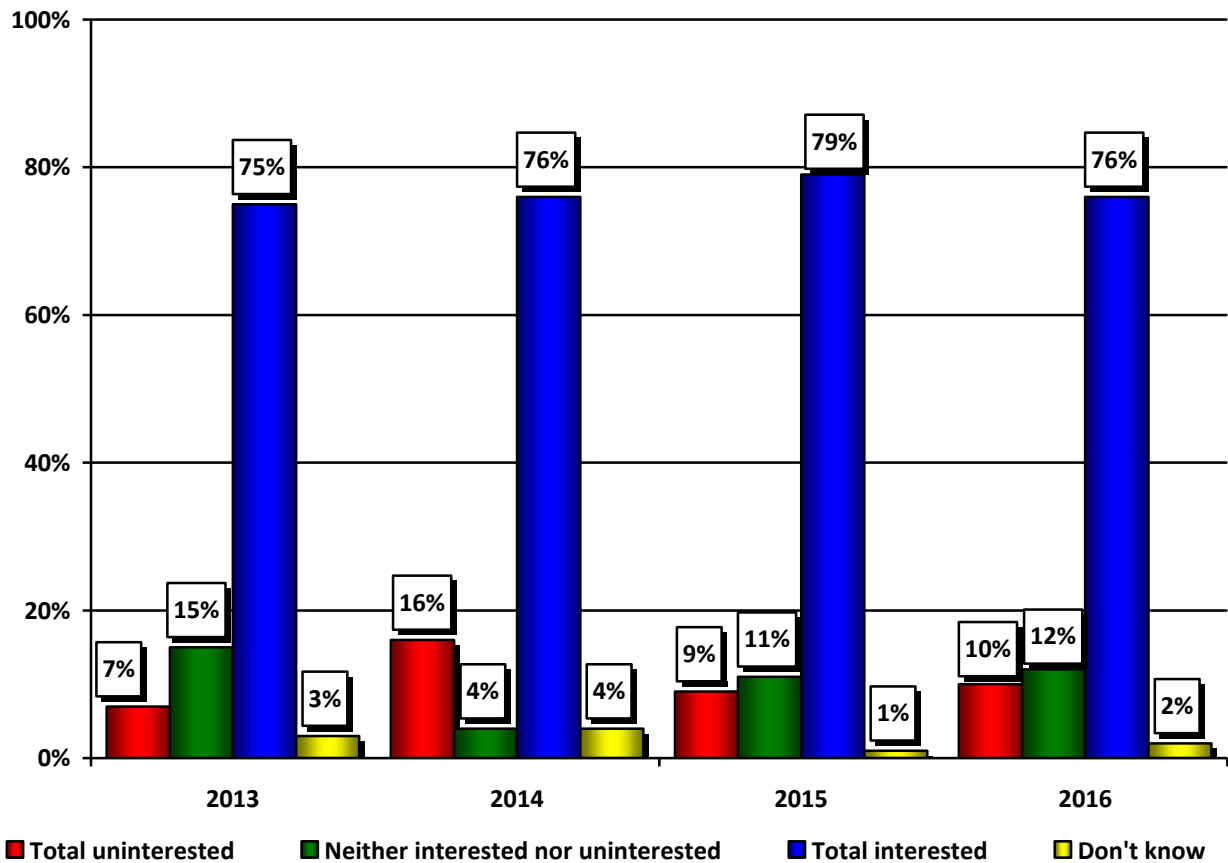


The top two positive rating of good and very good has remained consistent over the past three survey touch points. A total of 61% (+1% compared to 2015) accorded a good or very good score, 8% (-2%) a poor or very poor one, 15% (-1%) a neutral or satisfactory rating, while 6% did not know and 10% said that they had no experience or have not seen one (combined 16% for do not know & no experience).

ENERGY EFFICIENCY

A question was asked about consumer interest in having GSH providing them with information about home energy efficiency and cost savings.

Q30. "Using a scale from one not at all interested to five very interested, how interested would you be in having Greater Sudbury Hydro provide information which could help your home save money by being more energy efficient?"

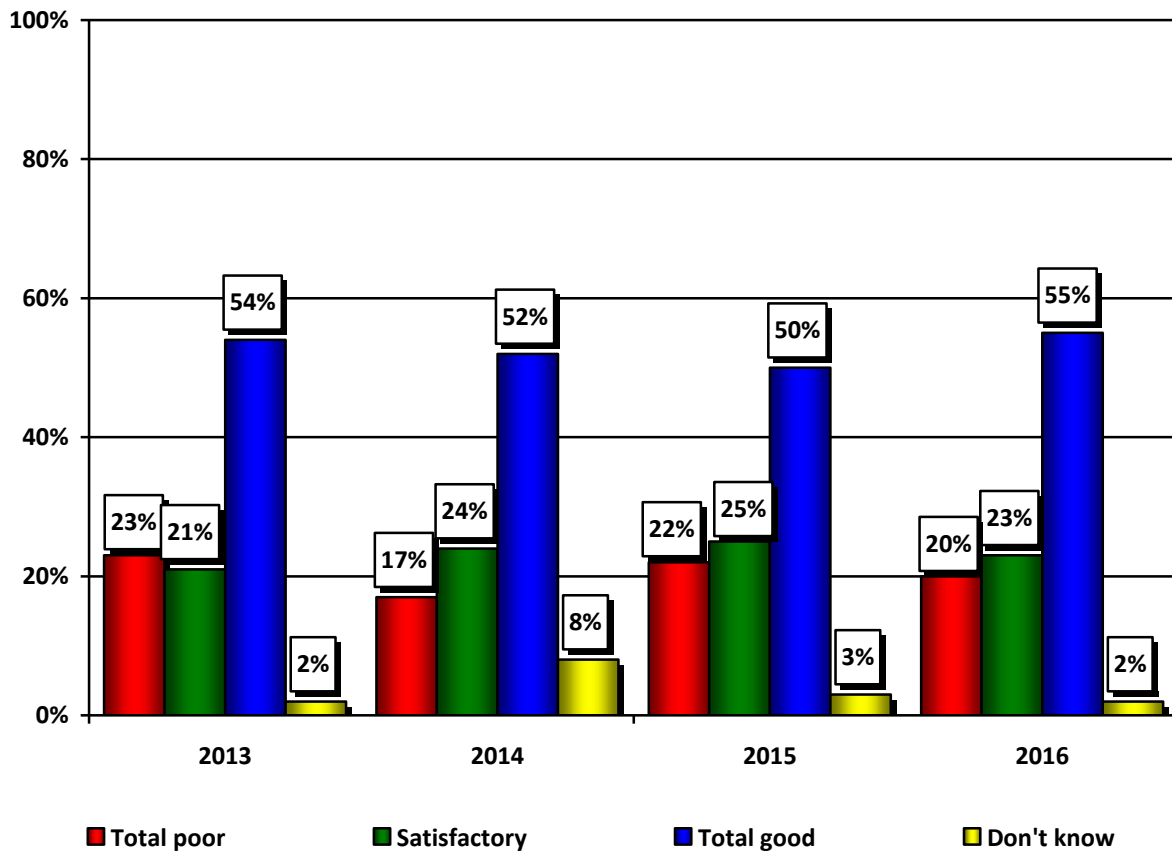


Slightly more than three-quarters of customers or 76% are interested in GSH providing them with information to help them save money by being more energy efficient, slightly lower than in 2015 (79%) but similar to 2014 (76%). Interest was highest among those 35-54 (87%) and the lowest income earners of under \$50,000 per annum (82%).

BILLING – EASE OF UNDERSTANDING

Residential customers rated their energy bill and the ease of reading or understanding it.

Q31. “Using a scale from one very poor to five very good, how would you rate how easy it is to read and understand your power or utility bill?”



55% of customers provided a good or very good rating for the ease of understanding or reading their GSH bill, 5% higher than in 2015 but similar to the 2013 baseline results (54%). Two in ten (20%) provided a poor or very poor score (-2%), 23% a satisfactory rating (-2%), while 2% did not know (-1%). Older residents 55+ tended to provide a higher poor rating (28%) as did those with the lowest household incomes of under \$50,000 (27%).

IMPROVEMENT COMMENTS

In a final open ended or unaided question asked to all residential customers, they were asked **what they felt Greater Sudbury Hydro could do to better service its customers (Q32)**. Themes related to maintaining or reducing the cost of electricity and explaining how pricing works dominated the responses from the customer base. There were 35% of replies associated with lowering hydro rates and 7% related to maintaining current rates. A total of 7% would like the cost of electricity explained in their bills, 6% want their bills easier to understand and 6% information on what is involved in the price of hydro. 5% said that they want information on how to conserve energy, 4% would like better communication from GSH, 2% something around alternative energy options, 1% incentives for reducing energy usage, 1% fewer outages and 1% better hours of operation.

DISTRIBUTION SYSTEM PLANNING

A series of six new questions were added in this survey period related to “Distribution System Planning”. The following descriptive preamble was first read to respondents after which they were asked the first question about what they feel accounts for the biggest part of their electricity bill.

“The money you pay for electricity goes to pay for three things including, 1) generating electricity at source, 2) transmitting electricity from where it is generated to Greater Sudbury Hydro and 3) locally delivering or distributing electricity from Greater Sudbury Hydro to your home / business.”

DSP Q1. “Which of these do you think accounts for the greatest part of your bill?” [READ]

		Percent
	Generation	19%
	Transmission	24%
	Local delivery	41%
	Don't know (not read)	16%

More customers or 41% perceive that local delivery represents the largest part of their hydro bill, while the remaining responses among those with an opinion were split between transmission (24%) and generation (19%). 16% did not know or were unsure.

Another short descriptive preface explained local delivery costs, with a follow up question asking customers about the percentage that they felt stayed with GSH.

DSP Q2. “Only the cost of the distribution, which is the local delivery, stays with Greater Sudbury Hydro to cover the cost of providing electricity to your home / business. Would you say that this amount is...?” [READ]

		Percent
	Under 20%	16%
	20% to 40%	19%
	41% to 60%	15%
	61% to 80%	6%
	Or more than 80%	4%
	Don't know (not read)	40%

Four in ten or 40% of customers surveyed were unsure or were unable to name a percentage amount, while half stated percentages of 60% or less with 16% saying under 20%, almost two in ten (19%) 20% to 40% and 15% the range of 41% to 60%. Only 6% recalled 61% to 80% and 4% more than 80%.

A final statement was read outlining Greater Sudbury Hydro’s five-year Distribution System Plan. Customers then rated the importance of four aspects of the plan.

“Greater Sudbury Hydro is currently developing a five-year Distribution System Plan (DSP) that will assist in managing investments in all aspects of the electricity system that they operate. The Plan covers everything from replacing or upgrading parts of the system such as poles and transformers, ensuring access for new customers, providing new sources of green energy for homes / businesses, improving the system to manage outages more effectively and determining how resources will be most efficiently spent on equipment.”

“Using a scale from one not at all important to five very important please rate the importance of each of the following aspects of the plan to you as a customer.”[READ / ROTATE LIST]

DSP IMPORTANCE INDICATORS	Total unimportant	Neither Important Nor Unimportant	Total Important	Don't Know
DSP Q3. “To maintain or improve on the current level of system reliability , keeping outages to as few as possible and as short as possible”	3%	9%	84%	4%
DSP Q4. “To maintain or improve on the current level of safety for it’s employees and the public”	5%	12%	74%	9%
DSP Q5. “To enable the connection of renewable energy sources such as solar panels and wind generation to the electricity system”	25%	17%	51%	7%
DSP Q6. “To make efficient investments in the system to keep the cost of the local delivery of electricity as low as possible ”	4%	8%	86%	2%

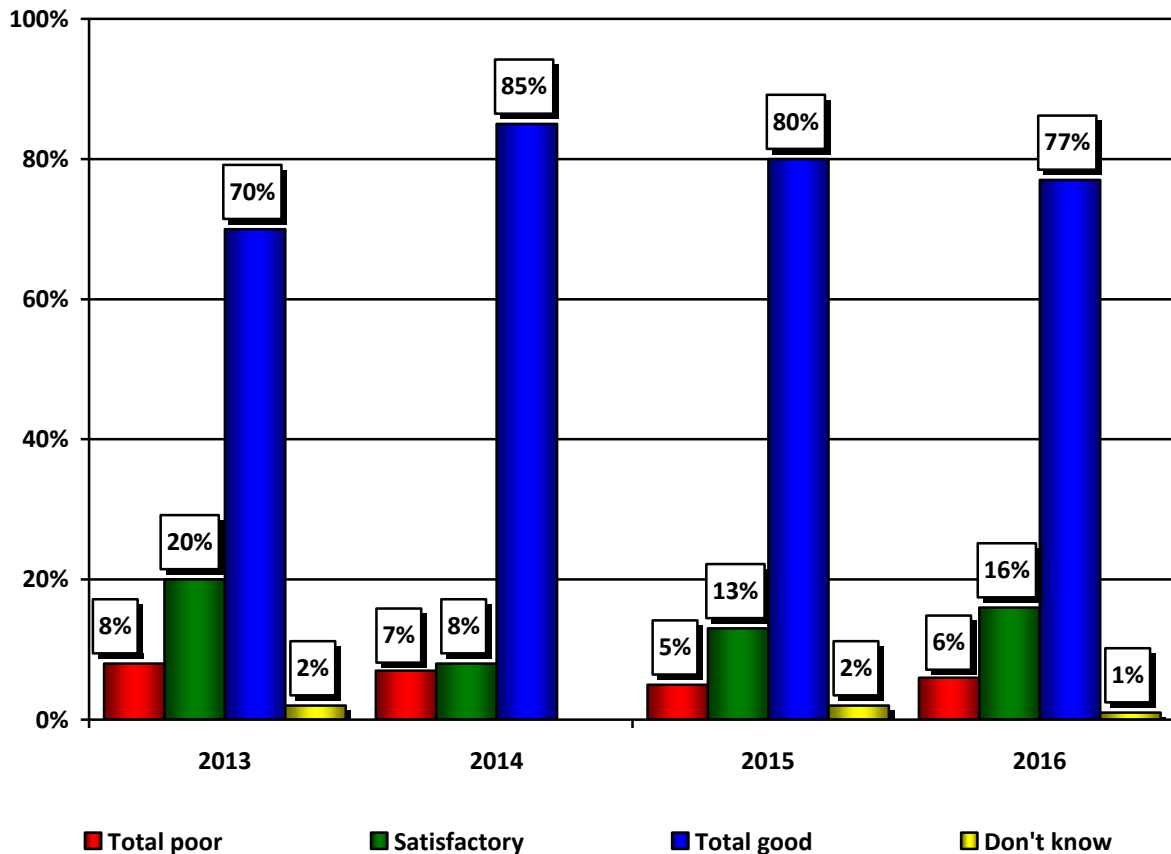
The most important aspect of the plan to a strong 86% majority of customers is to make investments to keep the cost of delivery as low as possible, closely followed by 84% that feel it is important to maintain or improve reliability in order to reduce outages. A lesser but still significant 74% feel it is important to maintain or improve the current level of safety, but only 51% are of the opinion that it is important to enable the connection of renewable energy sources.

EXECUTIVE SUMMARY- BUSINESS

SATISFACTION

Business customers were first asked the following overall satisfaction question.

Q1. "Considering all aspects of being a customer of Greater Sudbury Hydro, how would you rate your overall satisfaction with the company as your electrical services provider?"

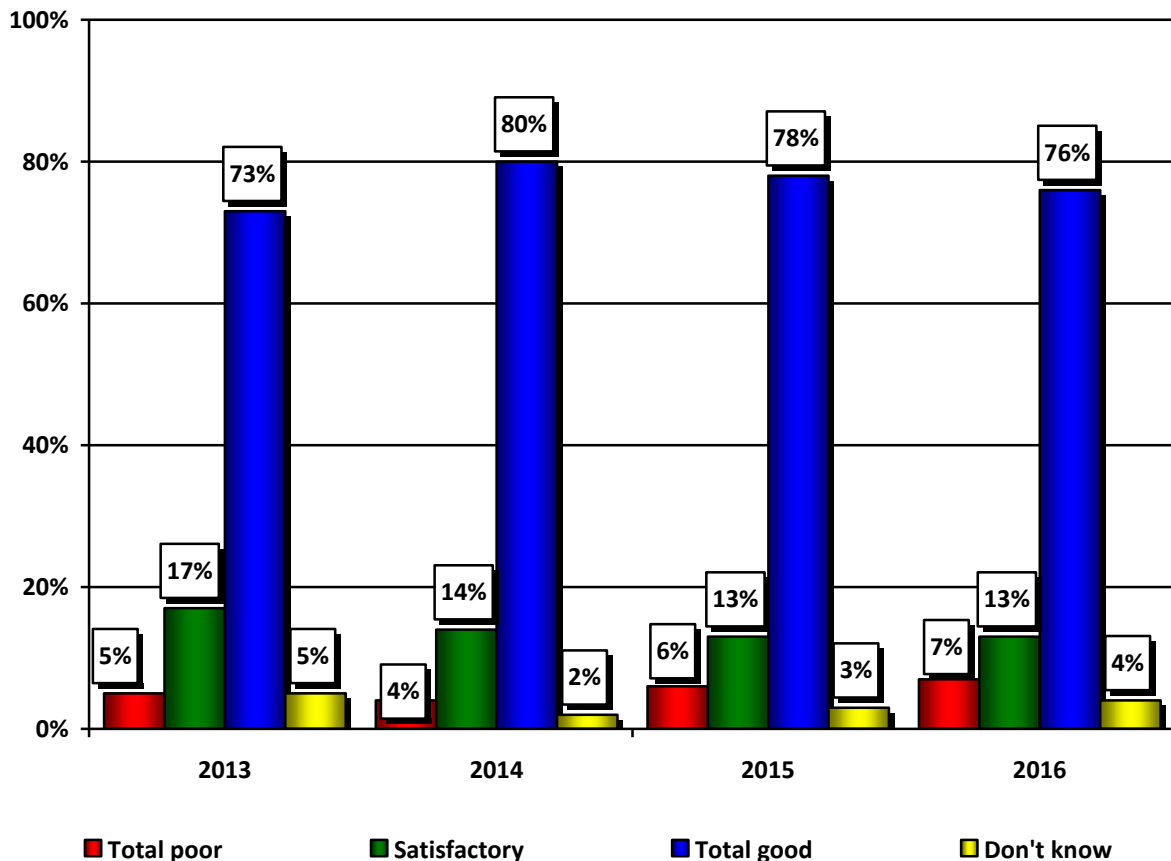


Overall satisfaction as represented by the combined good and very good responses is 77%, a slight drop of 3% compared to 2015, while there was a corresponding increase of 3% in the neutral or satisfactory rating to 16%. Total poor mentions were consistent at 6% up only slightly (+1%) as were the number of those that answered do not know at 1% (+1%).

CUSTOMER SERVICE

Businesses were then asked the following comparative service question, rating GSH's service against other providers.

Q2. "How would you rate Greater Sudbury Hydro's customer service (i.e. being responsible and reliable) compared to other service providers such as your heating fuel, Telephone Company or your cable TV or satellite provider?"

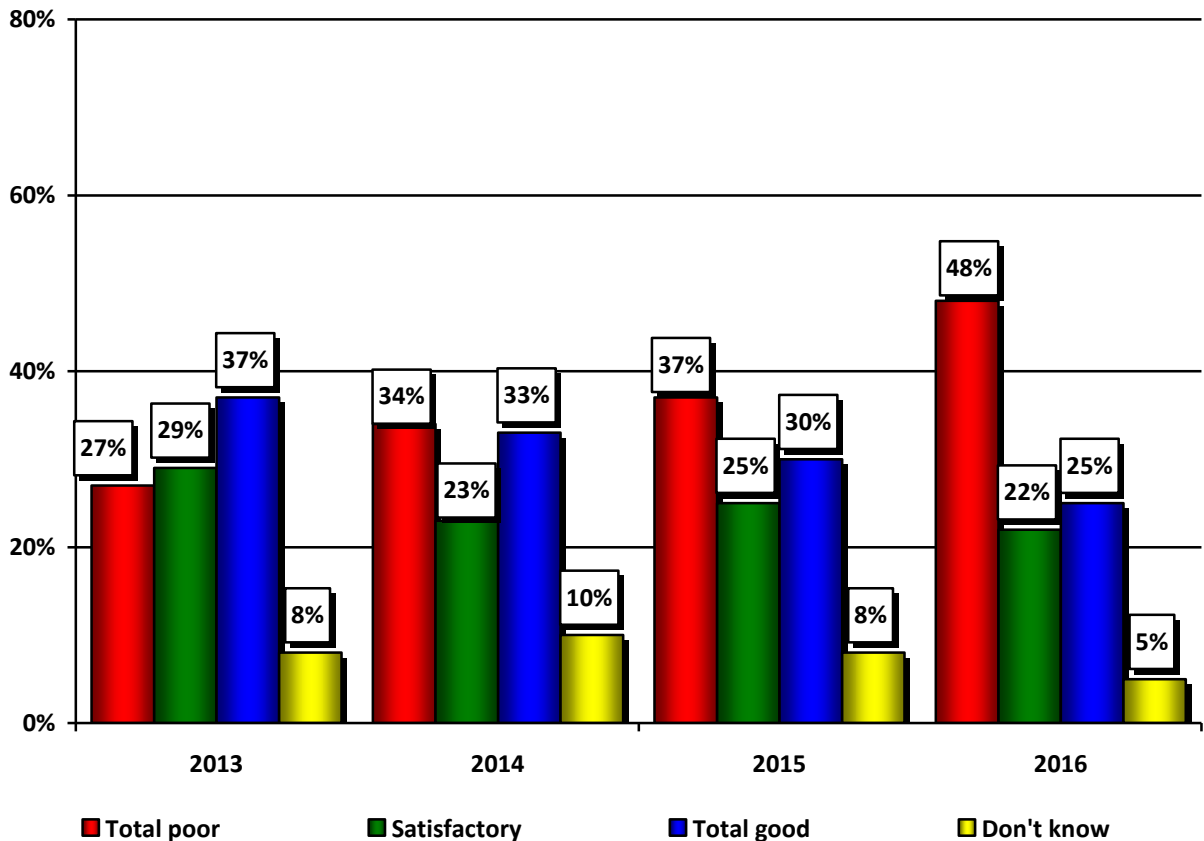


A total of 76% of businesses provided a good or very good rating for GSH and its service in relation to other providers, a similar but lower result compared to 2015 (78%) and 2014 (80%), but still higher than the baseline 2013 figure (73%). The satisfactory rating is the same as 2015 (13%), while there were marginal increases in the total poor (+1%) and do not know responses (+1%).

PRICE COMPARISON

A comparative price question was then asked comparing GSH to other essential services.

Q3. "How would you rate your satisfaction with the price you pay for electricity compared to what you pay for other (essential) services in your area (heating fuel, telephone company or your cable TV and satellite provider)?"

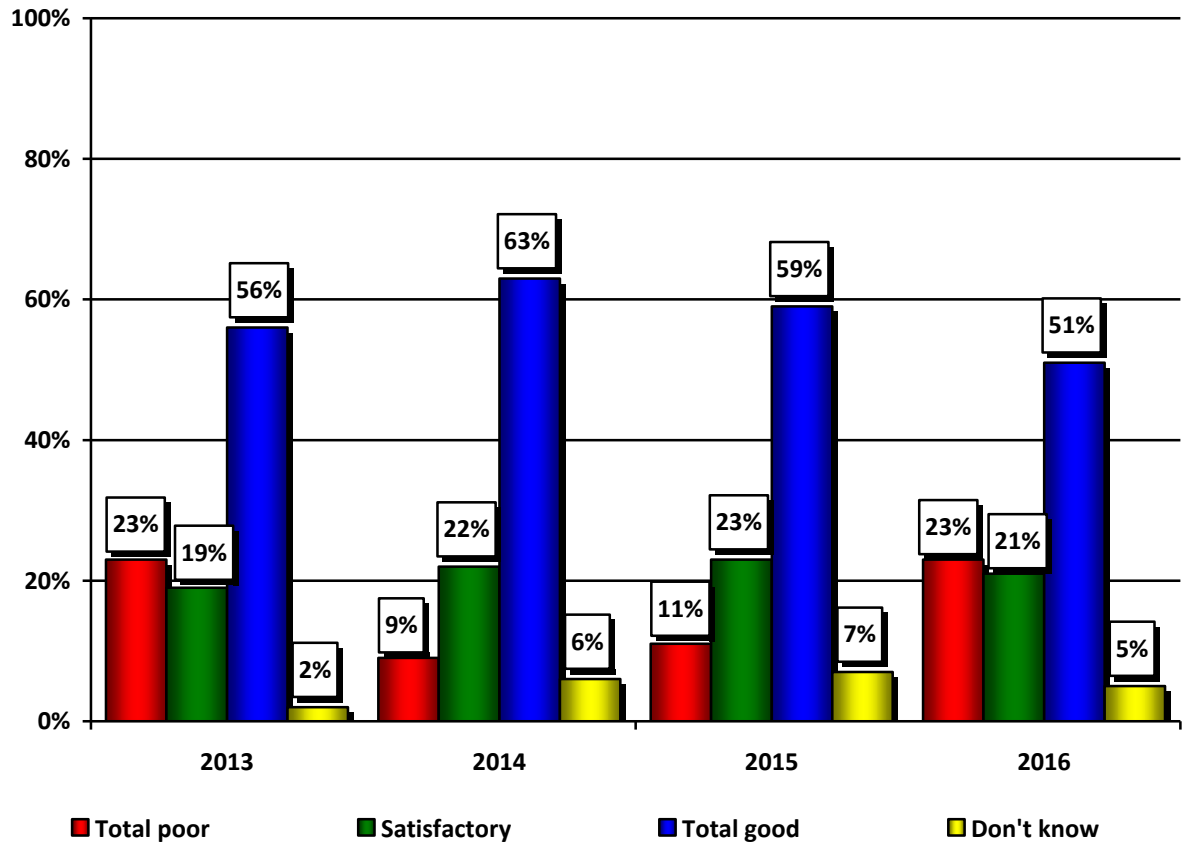


Dissatisfaction (poor and very poor) with the comparative cost of electricity in relation to other essential services witnessed a sharp increase compared to the previous 2015 survey, as almost half of businesses or 48% provided a poor or very poor score in this area, up 11%. The total positive or combined good rating dropped 5% to 25%, while there were also decreases in the satisfactory (-3%) and do not know areas (-3%).

OVERALL VALUE

Customers also rated the overall value that Greater Sudbury Hydro provides.

Q4. "Using the same scale from one very poor to five very good, how would you rate the overall value that Greater Sudbury Hydro provides?"



The perceived value indicator also saw a drop of 8% compared to 2015 as only slightly more than half or 51% gave a good or very good rating, while 12% more or 23% accorded a poor or very poor score.

RATING GREATER SUDBURY HYDRO

Business respondents were then asked to rate their level of agreement with a series of descriptive statements about Greater Sudbury Hydro. The table below combines the responses of agree and strongly agree and compares the results over time.

“I am now going to read some brief statements that may be used to describe Greater Sudbury Hydro. Using a scale from one strongly disagree to five strongly agree, please respond to each statement after it is read.”

STATEMENTS – TOTAL AGREE (Somewhat & Strongly)	2013	2014	2015	2016
Q5. Greater Sudbury Hydro provides customers with reliable and good service.	69%	89%	85%	81%
Q11 Greater Sudbury Hydro encourages efficient use of electricity among its customers.	55%	75%	71%	80%
Q7. Greater Sudbury Hydro meets its commitment to customers.	69%	86%	83%	79%
Q8. Greater Sudbury Hydro provides its customers with information about programs to help customers reduce their energy costs.	65%	71%	69%	76%
Q9. Greater Sudbury Hydro is concerned about public safety and safe work practices.	65%	58%	56%	64%
Q10. Greater Sudbury Hydro invests in and gives back to the community (e.g. through sponsorship / donations; school safety program and support for other activities).	38%	29%	25%	31%
Q6. Greater Sudbury Hydro is committed to effectively managing a balanced budget.	25%	21%	21%	19%

Total agreement (somewhat & strongly agree) remains highest for providing good and reliable service at 81% despite a 4% drop over 2015, closely followed by the indicator related to encouraging the efficient use of electricity at 80% which saw a 9% gain and meeting commitment to customers at 79% (-4% compared to 2015). There was also a 7% improvement in terms of total agreement for GSH providing customers with information about programs to reduce energy costs (76%) and +8% for being concerned about public safety (64%). The remaining two areas of investing back in the community (31%) and especially for being committed to a balanced budget (19%) had the lowest agreement scores, but a high number of business customers were unsure of the performance of GSH responding do not know (39% & 54% respectively).

RATING PERFORMANCE

Businesses were then asked to rate the performance of Greater Sudbury Hydro across four indicators. The table below combines the positive responses of good and very good while tracking the results over time.

“Using a scale from one very poor to five very good, please rate the performance of Greater Sudbury Hydro in each of the following areas.”

PERFORMANCE RATING (Good & Very Good)	2013	2014	2015	2016
Q12. The reliability of power supply	91%	90%	87%	89%
Q13. Prompt responses to power outages when they occur	74%	73%	70%	72%
Q14. Effectively scheduling planned power outages	61%	59%	55%	41%
Q15. Effectively communicating with customers about planned power interruptions in your area	62%	53%	50%	40%

Good and very good scores remain highest for the reliability of the power supply at 89%, followed by the prompt response to outages at 72% – both areas that improved +2% each. There were positive (good & very good) rating decreases for effectively scheduling planned outages (-14%) and communicating with customers about planned outages (-10%). While the scheduling (41%) and communicating about outage (40%) positive scores were low, the unsure or no experience answers for each were high at 46% & 49% respectively.

RATES VS OUTAGES

A question was asked about the cost customers are willing to pay for electricity in relation to the security of service delivery or keeping the lights on.

Q16. "I am going to ask your opinion on the issue of balancing the price you pay for maintenance and renewal of your local electricity infrastructure with the security of your electricity service delivery or "keeping the lights on". Please respond on a scale from one having the lowest rates possible with regular outages to five having the highest rates possible with no outages – 3 would be a balance between rates and outages."

RATES VERSUS OUTAGE TRADE OFF	2013	2014	2015	2016
1-lowest rates – regular outages	3%	4%	3%	3%
2-low rates – occasional outages	6%	3%	5%	4%
3-neutral – a balance between rates and outages	57%	58%	65%	69%
4-high rates – only a few outages	12%	18%	14%	9%
5-highest rates – no outages	9%	3%	2%	1%
Don't know	13%	14%	11%	14%

A 69% majority of businesses and 4% more than in 2015 want a balance between rates and outages. Only 7% are willing to have lower prices at the cost of some form of outage, and 10% would tolerate a higher rates for fewer or no interruptions. 14% did not know or were unsure.

PAYMENT OPTIONS

Respondents were asked about their interest in a series of options for their electricity bill payments and were asked for responses of either yes or no for each.

Q17. “Please tell me if you are interested in each of the following payment methods for your electricity bills?”

INTEREST IN PAYMENT OPTIONS	2013	2014	2015	2016
Online / telephone banking through your financial institution	51%	42%	47%	62%
Equal monthly payment plan	36%	41%	43%	56%
Automatic withdrawal from your bank account	22%	43%	42%	37%
Online at Sudbury Hydro Website	20%	16%	19%	22%
Payment at the Greater Sudbury Hydro office	25%	28%	19%	16%

More than six in ten businesses or 62% have a preference for online or telephone banking up 15% over the last survey period, followed by 56% that favour an equal monthly payment plan also 13% greater than in 2015. Interest was next strongest for automatic bank withdrawals at 37% (-5%), while it was low at 22% for payment through the GSH website and lowest at 16% for payment at the GSH office.

Those respondents that provided **multiple responses of yes to the payment method question (N=65) were then asked which one was their most preferred (Q18)**. Online or telephone payment was most cited by 40%, followed by automatic withdrawals at 28% and equal monthly payments at 25%. Only 6% named online through the GSH website and 1% an in person office transaction.

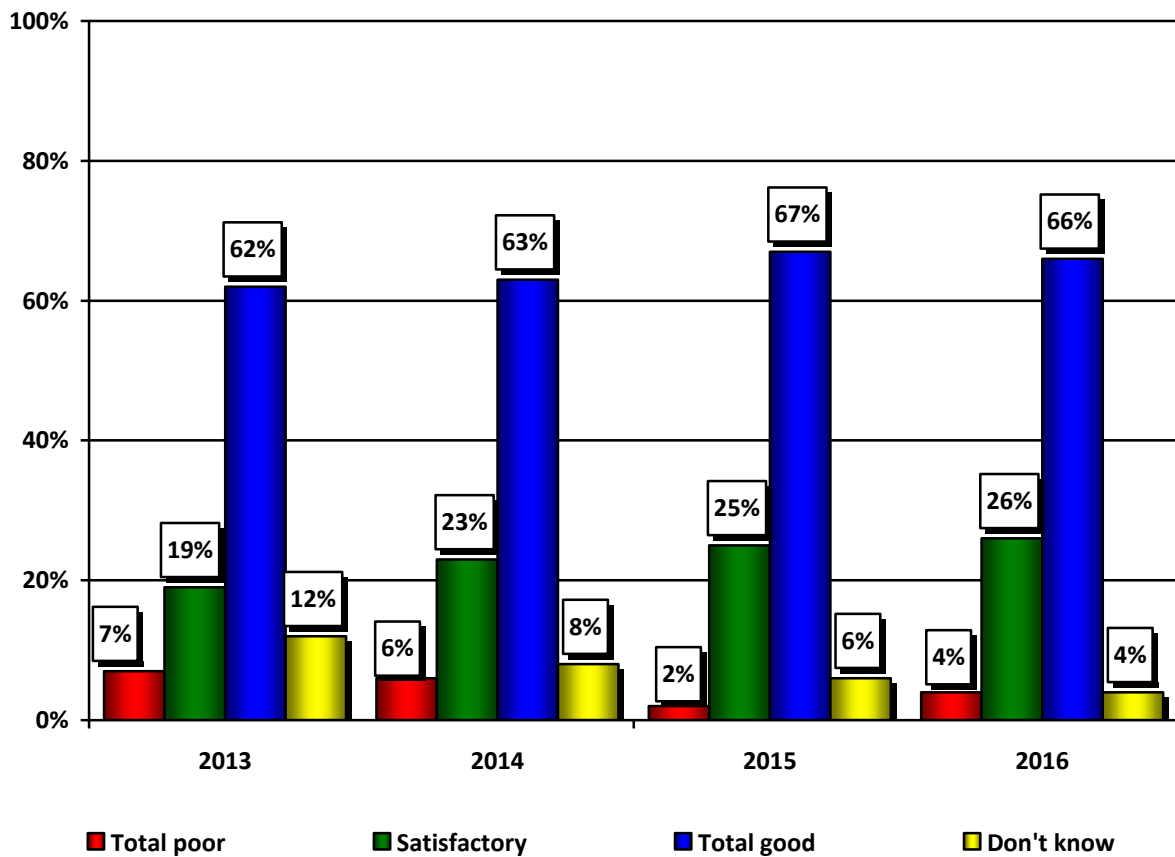
In total 23% of business customers surveyed **currently receive their hydro bill electronically (Q19)** compared to 16% in 2015.

The (N=77) that do not currently receive an electronic statement were asked if they would be interested in receiving an E-bill (Q20). A total of 45% claimed that they would favour getting an electronic statement (36% in 2015) and 55% would not.

COMMUNICATION

Customers were asked a series of questions were asked about communications starting with the following overall rating.

Q21. "Greater Sudbury Hydro communicates to its customers through a variety of methods including bill inserts, direct mail, its website, newspapers and radio. Please rate the performance of Greater Sudbury Hydro in communicating with its customers using a scale from one very poor to five very good?"



The overall communications positive rating of good and very good is 66%, consistent with findings from 2015.

Businesses were asked in an open ended unaided question about their **preferred method to have Greater Sudbury Hydro communicate information to them (Q22)**. Email was the preferred method of 38% (+11% over 2015), followed by bill inserts at 22% (-3%) and direct mail at 17% (-5%). Other mentions included the GSH website by 10% (-1%), telephone by 5% (-2%), social media by 3% (+2%), a newsletter by 2% (-2%), while 3% had no preference.

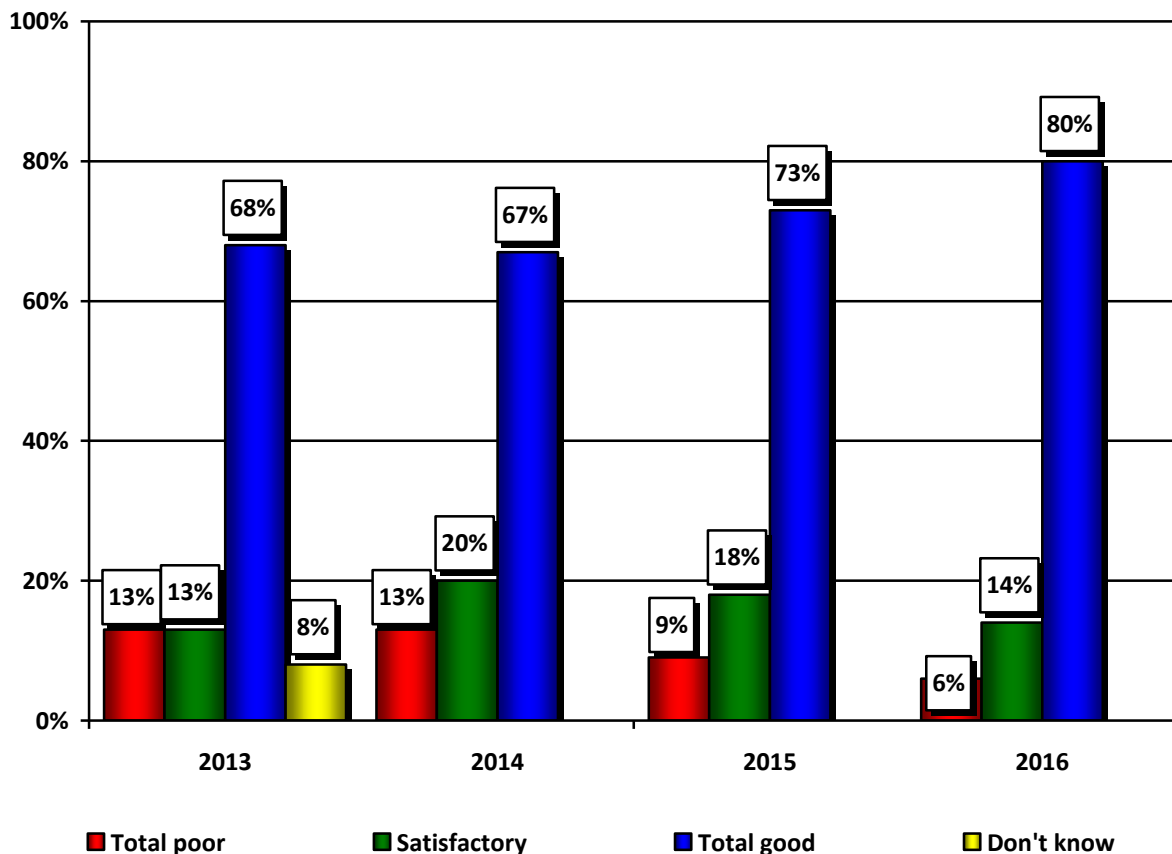
In another open or unaided question, businesses were asked about **how that they would most like to communicate with GSH (Q23)**. The direct approach by telephone was most named by 55% (+3%) of those surveyed, followed by an email by 32% (+3%), social media by 6% (+2%) and a link or form on the GSH website by 6% (-2%), while 1% had no preference.

WEBSITE

In a lead question, businesses were asked if they **had visited the Greater Sudbury Hydro website over the course of the last year (Q24)** of which 36% said that they have (22% in 2015 % & 15% in 2014).

The N=36 of GSH website visitors were then asked follow up questions related to the site and the information it provides.

Q25. "How would you rate the quality of the information provided on the Greater Sudbury Hydro website?"



Satisfaction (good & very good score) with the website increased 7% over 2015 to 80%, the poor or very poor rating fell 3% to 6% and the satisfactory mark dropped 4% to 14% in relation to last year.

Website visitors were also asked in a question allowing for multiple responses about **the information that they were looking for (Q26)**. In total, 37% of all combined multiple responses related to account information, 24% energy conservation, 17% rates or fees, 9% corporate information, 7% power outages, 4% contact information and 2% grant information for upgrades.

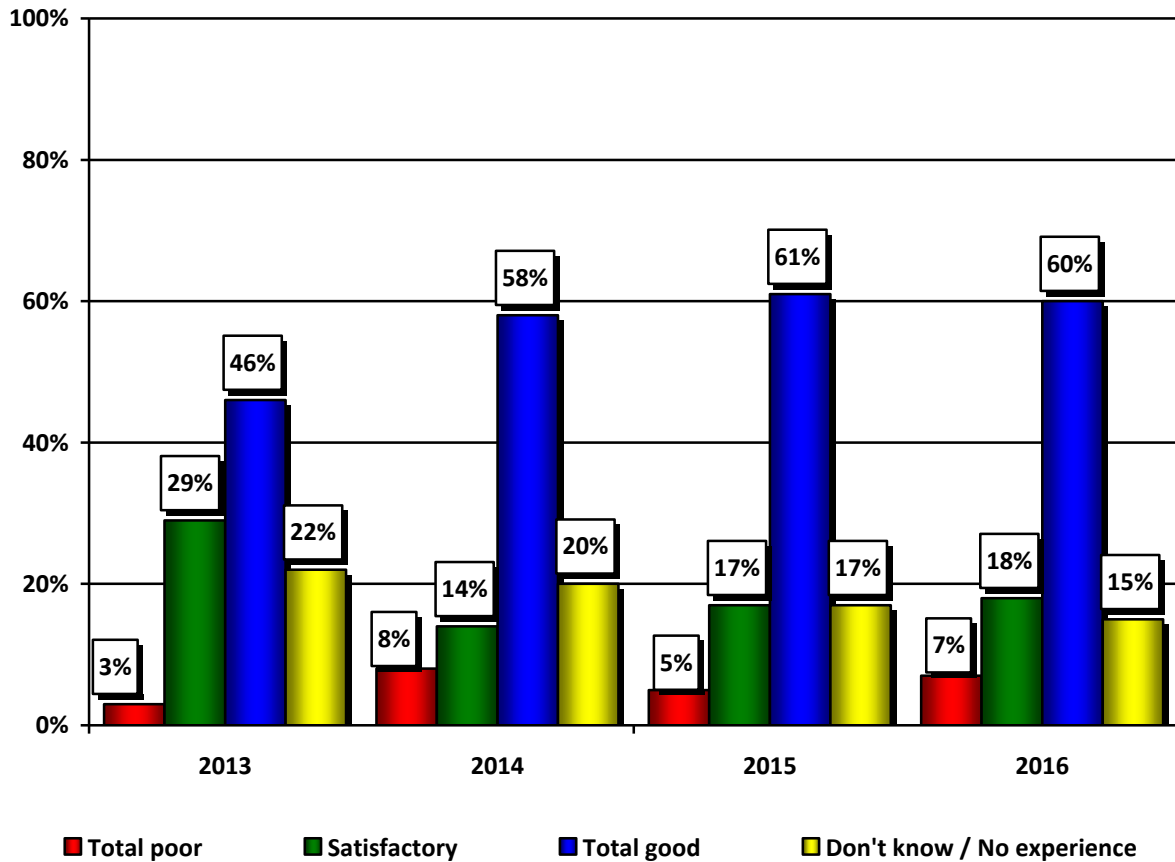
In a final website rating question, business visitors were asked **if they found the information that they were looking for (Q27)** of which 75% said that they did (77% in 2015 & 60% in 2014).

All business respondents (N=100) were then questioned as to whether **they would be interested in managing their GSH account online (Q28)**. More than six in ten or 64% claimed that they would be interested, compared to 58% in 2015 and 44% in 2014.

BILL INSERTS / LINKS

Respondents then rated the information provided by Greater Sudbury Hydro in bill inserts or electronic links.

Q29. "From time to time, Sudbury Hydro attaches information to your bill in the form of a bill insert, or for electronic bill, in the form of a link. Using a scale from one very poor to five very good, how would you rate the overall quality of each of the bill inserts and other printed material you have received from Greater Sudbury Hydro?"

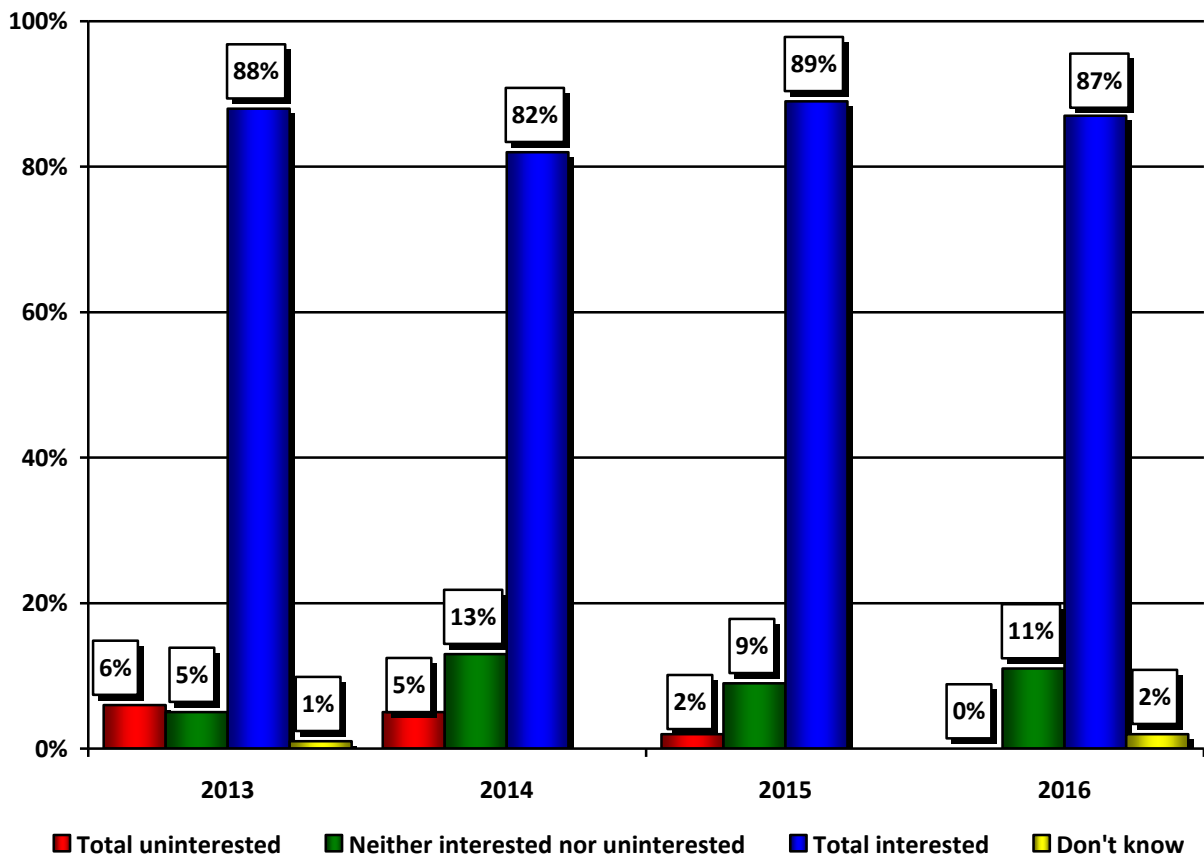


The good and very good rating provided for bill inserts or electronic bill links remains stable at 60% compared to 2015 (61%).

ENERGY EFFICIENCY

A question about interest in information to help them save money by being more energy efficient was asked.

Q30. "Using a scale from one not at all interested to five very interested, how interested would you be in having Greater Sudbury Hydro provide information which could help you save money by being more energy efficient?"

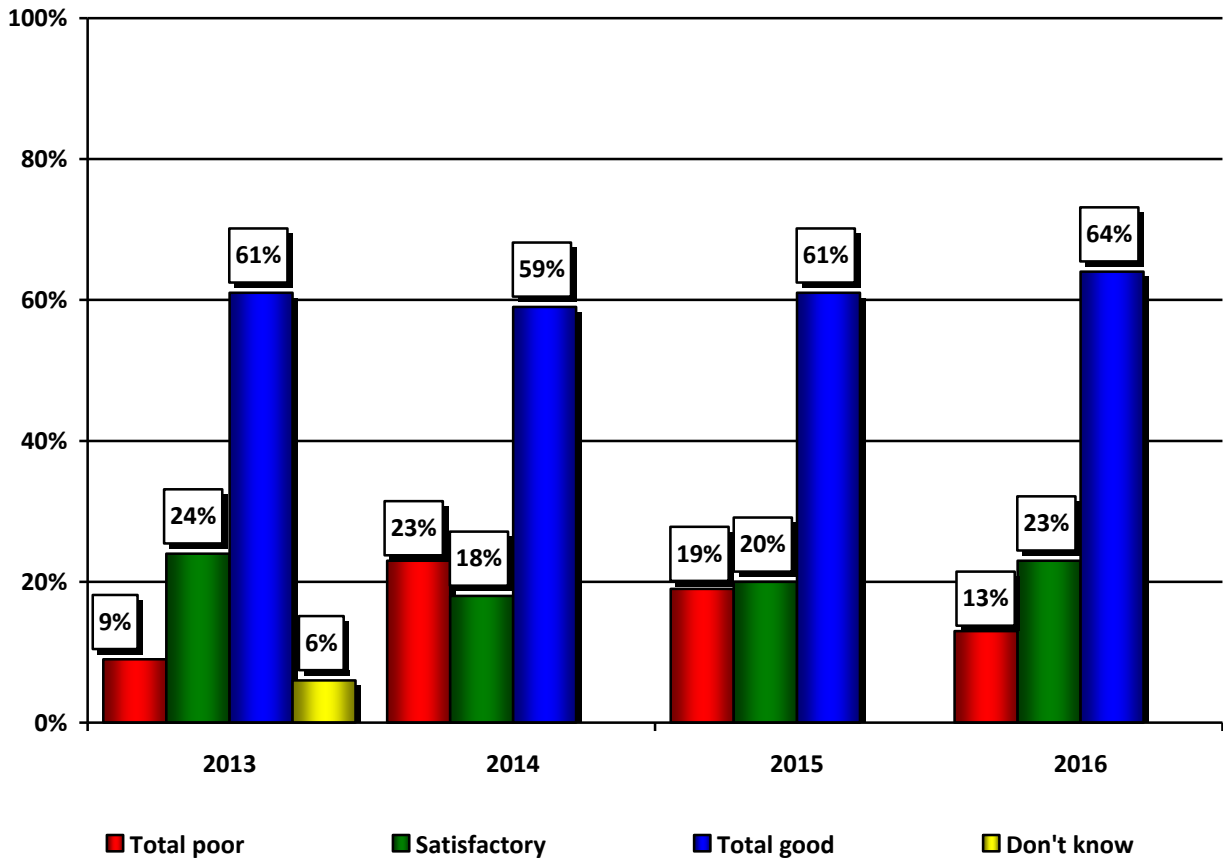


Consumer interest in obtaining energy efficiency information remains strong at 87% (89% in 2015), while no businesses were disinterested, 11% had a neutral opinion (neither interested nor uninterested) and 2% were unsure.

BILLING – EASE OF UNDERSTANDING

In the last rating question that has been tracked over time, businesses rated the ease of reading or understanding their energy bill.

Q31. “Using a scale from one very poor to five very good, how would you rate how easy it is to read and understand your power or utility bill?”



A total of 64% of customers provided a good or very good score for the ease of understanding or reading their utility bill, 3% more than in 2015 (61%). Only 13% gave a poor or very poor response (-6%) and 23% (+3%) a satisfactory one.

IMPROVEMENT COMMENTS

In an open ended or unaided question asked to all businesses, they were asked **what they felt Greater Sudbury Hydro could do to better service its customers (Q32)**. The issue of cost or price was the dominant theme among half with 38% naming lower rates and 12% maintaining rates or no increases. Almost one-quarter also want to know more about what is involved in the price of hydro (13%) or would like the cost explained better on their bill (10%), while an additional 6% want their bills clearer or easier to understand. Other mentions included having fewer outages (2%), quicker or faster services (2%), improved hours of operation (1%), more notice about outages (1%) and better communication in general (1%).

DISTRIBUTION SYSTEM PLANNING

Six new questions were asked to businesses in this survey period about “Distribution System Planning”. The following descriptive preamble was first read to respondents after which they were asked the first question about what they feel accounts for the biggest part of their electricity bill.

“The money you pay for electricity goes to pay for three things including, 1) generating electricity at source, 2) transmitting electricity from where it is generated to Greater Sudbury Hydro and 3) locally delivering or distributing electricity from Greater Sudbury Hydro to your home / business.”

DSP Q1. “Which of these do you think accounts for the greatest part of your bill?” [READ]

		Percent
	Generation	15%
	Transmission	40%
	Local delivery	32%
	Don't know (not read)	13%

Business customers were split on the issue with 40% being of the opinion that transmission represents the biggest part of their bill and 32% local delivery (32%). Only 15% claimed generation and 13% were unsure.

Another short descriptive preface explained local delivery costs, with a follow up question asking customers about the percentage that they felt stayed with GSH.

DSP Q2. “Only the cost of the distribution, which is the local delivery, stays with Greater Sudbury Hydro to cover the cost of providing electricity to your home / business. Would you say that this amount is...?” [READ]

		Percent
	Under 20%	7%
	20% to 40%	17%
	41% to 60%	30%
	61% to 80%	15%
	Or more than 80%	9%
	Don't know (not read)	22%

The range of 41% to 60% was the most named (30%), followed by 20% to 40% (17%) and 61% to 80% (15%), while only 7% stated under 20% and 9% more than 80%. There were 22% that did not know.

A final statement was read outlining Greater Sudbury Hydro’s five-year Distribution System Plan. Customers then rated the importance of four aspects of the plan.

“Greater Sudbury Hydro is currently developing a five-year Distribution System Plan (DSP) that will assist in managing investments in all aspects of the electricity system that they operate. The Plan covers everything from replacing or upgrading parts of the system such as poles and transformers, ensuring access for new customers, providing new sources of green energy for homes / businesses, improving the system to manage outages more effectively and determining how resources will be most efficiently spent on equipment.”

“Using a scale from one not at all important to five very important please rate the importance of each of the following aspects of the plan to you as a customer.”[READ / ROTATE LIST]

DSP IMPORTANCE INDICATORS	Total unimportant	Neither Important Nor Unimportant	Total Important	Don't Know
DSP Q3. “To maintain or improve on the current level of system reliability , keeping outages to as few as possible and as short as possible”	0%	5%	93%	2%
DSP Q4. “To maintain or improve on the current level of safety for it’s employees and the public”	3%	7%	85%	5%
DSP Q5. “To enable the connection of renewable energy sources such as solar panels and wind generation to the electricity system”	30%	19%	44%	7%
DSP Q6. “To make efficient investments in the system to keep the cost of the local delivery of electricity as low as possible ”	0%	2%	97%	1%

Almost all of business respondents or 97% are of the opinion that it is important to make investments to keep the cost of delivery as low as possible, followed by a significant 93% that feel it is important to maintain or improve reliability in order to reduce outages. Also rated strongly in terms of importance was the area of maintaining or improving the current level of safety, however only 44% said that it is important to enable the connection of renewable energy sources.

RESULTS BY QUESTION – RESIDENTIAL

Q1. Considering all aspects of being a customer of Greater Sudbury Hydro, how would you rate your overall satisfaction with the company as your electrical services provider? Please respond using a scale from one very poor to five very good.

	Frequency	Percent
1-very poor	9	2.3
2-poor	21	5.3
3-satisfactory	85	21.3
4-good	117	29.3
5-very good	163	40.8
Don't know	5	1.3
Total	400	100.0

Q2. Using a scale from one very poor to five very good, how would you rate Greater Sudbury Hydro's customer service (i.e. being responsible and reliable) compared to other service providers such as your heating fuel, Telephone Company or your cable TV or or satellite provider?

	Frequency	Percent
1-very poor	15	3.8
2-poor	24	6.0
3-satisfactory	49	12.3
4-good	135	33.8
5-very good	142	35.5
Don't know	35	8.8
Total	400	100.0

Q3. Using a scale from one very poor to five very good, how would you rate your satisfaction with the price that you pay for electricity compared to what you pay for other [essential] services in your area [heating fuel, telephone company or your cable TV and satellite provider]?

	Frequency	Percent
1-very poor	128	32.0
2-poor	104	26.0
3-satisfactory	77	19.3
4-good	64	16.0
5-very good	16	4.0
Don't know	11	2.8
Total	400	100.0

Q4. Using the same scale from one very poor to five very good, how would you rate the overall value that Greater Sudbury Hydro provides?

	Frequency	Percent
1-very poor	33	8.3
2-poor	44	11.0
3-satisfactory	95	23.8
4-good	123	30.8
5-very good	85	21.3
Don't know	20	5.0
Total	400	100.0

I am now going to read some brief statements that may be used to describe Greater Sudbury Hydro. Using a scale from one strongly disagree to five strongly agree, please respond to each statement after it is read.

Q5. Greater Sudbury Hydro provides customers with reliable and good service

	Frequency	Percent
1-strongly disagree	12	3.0
2-somewhat disagree	26	6.5
3-neither agree nor disagree	70	17.5
4-somewhat agree	110	27.5
5-strongly agree	177	44.3
Don't know	5	1.3
Total	400	100.0

Q6. Greater Sudbury Hydro is committed to effectively managing a balanced budget

	Frequency	Percent
1-strongly disagree	42	10.5
2-somewhat disagree	26	6.5
3-neither agree nor disagree	76	19.0
4-somewhat agree	70	17.5
5-strongly agree	46	11.5
Don't know	140	35.0
Total	400	100.0

Q7. Greater Sudbury Hydro meets its commitment to customers

	Frequency	Percent
1-strongly disagree	29	7.3
2-somewhat disagree	13	3.3
3-neither agree nor disagree	51	12.8
4-somewhat agree	132	33.0
5-strongly agree	158	39.5
Don't know	17	4.3
Total	400	100.0

Q8. Greater Sudbury Hydro provides its customers with information about programs to help customers reduce their energy costs .

	Frequency	Percent
1-strongly disagree	46	11.5
2-somewhat disagree	37	9.3
3-neither agree nor disagree	64	16.0
4-somewhat agree	127	31.8
5-strongly agree	110	27.5
Don't know	16	4.0
Total	400	100.0

Q9. Greater Sudbury Hydro is concerned about public safety and safe work practices

	Frequency	Percent
1-strongly disagree	6	1.5
2-somewhat disagree	11	2.8
3-neither agree nor disagree	27	6.8
4-somewhat agree	109	27.3
5-strongly agree	132	33.0
Don't know	115	28.8
Total	400	100.0

Q10. Greater Sudbury Hydro invests in and gives back to the community (e.g. through sponsorship/donations; school safety program and support for other activities)

	Frequency	Percent
1-strongly disagree	30	7.5
2-somewhat disagree	27	6.8
3-neither agree nor disagree	55	13.8
4-somewhat agree	45	11.3
5-strongly agree	73	18.3
Don't know	170	42.5
Total	400	100.0

**Q11. Greater Sudbury Hydro encourages efficient use of electricity
among its customers**

	Frequency	Percent
1-strongly disagree	11	2.8
2-somewhat disagree	27	6.8
3-neither agree nor disagree	69	17.3
4-somewhat agree	159	39.8
5-strongly agree	125	31.3
Don't know	9	2.3
Total	400	100.0

Using a scale from one very poor to five very good, please rate the performance of Greater Sudbury Hydro in each of the following areas.

Q12. The reliability of power supply

	Frequency	Percent
1-very poor	5	1.3
2-poor	9	2.3
3-satisfactory	26	6.5
4-good	148	37.0
5-very good	203	50.8
Don't know	9	2.3
Total	400	100.0

**Q13. Prompt response(s) to power outages when
they occur**

	Frequency	Percent
1-very poor	3	.8
2-poor	5	1.3
3-satisfactory	52	13.0
4-good	161	40.3
5-very good	173	43.3
Don't know	6	1.5
Total	400	100.0

Q14. Effectively scheduling planned power outages

	Frequency	Percent
1-very poor	5	1.3
2-poor	5	1.3
3-satisfactory	17	4.3
4-good	141	35.3
5-very good	115	28.8
Don't know	117	29.3
Total	400	100.0

Q15. Effectively communicating with customers about planned power interruptions in your area

	Frequency	Percent
1-very poor	6	1.5
2-poor	13	3.3
3-satisfactory	28	7.0
4-good	133	33.3
5-very good	130	32.5
Don't know	90	22.5
Total	400	100.0

Q16. I am going to ask your opinion on the issue of balancing the price you pay for maintenance and renewal of your local electricity infrastructure with the security of your electricity service delivery or "keeping the lights on".

Please respond on a scale from one having the lowest rates possible with regular outages to five having the highest rates possible with no outages – 3 would be a balance between rates and outages.”

	Frequency	Percent
1-lowest rates regular outages	13	3.3
2-low rates occasional outages	29	7.3
3-balance between rates and outages	215	53.8
4-high rates only a few outages	48	12.0
5-highest rates no outages	19	4.8
Don't know	76	19.0
Total	400	100.0

Q17. Please tell me if you are interested in each of the following payment options for your electricity bills.

**Q17a. Online/telephone banking through
your financial institution**

	Frequency	Percent
Yes	233	58.3
No	167	41.8
Total	400	100.0

Q17b. Online at Sudbury Hydro Website

	Frequency	Percent
Yes	101	25.3
No	299	74.8
Total	400	100.0

**Q17c. Automatic withdrawal from your bank
account**

	Frequency	Percent
Yes	203	50.8
No	197	49.3
Total	400	100.0

Q17d. Equal monthly payment plan

	Frequency	Percent
Yes	216	54.0
No	184	46.0
Total	400	100.0

**Q17e. Payment at the Greater Sudbury Hydro
office**

	Frequency	Percent
Yes	48	12.0
No	352	88.0
Total	400	100.0

IF MULTIPLE RESPONSES PROVIDED IN Q17a – Q17e ASK Q18

Q18. Of those options what would be your preferred method of payment

	Frequency	Percent
Online/telephone banking through your financial institution	98	37.7
Online at Sudbury Hydro Website	10	3.8
Automatic withdrawal from your bank account	105	40.4
Equal monthly payment plan	37	14.2
Payment at the Greater Sudbury Hydro office	10	3.8
Total	260	100.0

Q19. Do you currently receive your hydro bill electronically?

	Frequency	Percent
Yes	80	20.0
No	320	80.0
Total	400	100.0

IF NO ASK Q20 / YES SKIP TO Q21

Q20. Would you be interested in receiving your bill electronically?

	Frequency	Percent
Yes	78	24.4
No	237	74.1
Don't know	5	1.6
Total	320	100.0

Q21. Greater Sudbury Hydro communicates to its customers through a variety of methods including bill inserts, direct mail, its website, newspapers and radio. Please rate the performance of Greater Sudbury Hydro in communicating with its customers using a scale from one very poor to five very good.

	Frequency	Percent
1-very poor	5	1.3
2-poor	20	5.0
3-satisfactory	70	17.5
4-good	173	43.3
5-very good	113	28.3
Don't know	19	4.8
Total	400	100.0

Q22. What is your preferred method to have Greater Sudbury Hydro communicate information to you?

	Frequency	Percent
E-mail from the company	102	25.5
Bill inserts	101	25.3
Direct mail	95	23.8
Social media	38	9.5
Greater Sudbury Hydro Website	29	7.3
Don't know/no preference	12	3.0
Radio	10	2.5
Customer newsletter	8	2.0
Newspaper advertising	5	1.3
Total	400	100.0

Q23. And as a customer, what is your preferred method that you would like to communicate with Greater Sudbury Hydro?

	Frequency	Percent
Telephone	223	55.8
Email	89	22.3
In person / face to face	36	9.0
Social media	30	7.5
Link or form on Greater Sudbury Hydro Website	13	3.3
Regular mail	9	2.3
Total	400	100.0

Q24. Have you visited the Greater Sudbury Hydro website within the past 12 months?

	Frequency	Percent
Yes	127	31.8
No	273	68.3
Total	400	100.0

IF YES ASK Q25 / IF NO SKIP TO Q27

Q25. How would you rate the quality of the information provided on the Greater Sudbury Hydro website?

	Frequency	Percent
1-very poor	4	3.1
2-poor	6	4.7
3-satisfactory	19	15.0
4-good	61	48.0
5-very good	35	27.6
Don't know	2	1.6
Total	127	100.0

Q26. What information did you look for?

(Multiple Responses Accepted)

	Responses	
	N	Percent
Account information	51	33.1%
Rates & Fees	33	21.4%
Corporate info	6	3.9%
Energy conservation	37	24.0%
Environment/Safety	2	1.3%
News or Developments	7	4.5%
Contact information	6	3.9%
Outage information	8	5.2%
Report an issue	4	2.6%
Total	154	100.0%

Q27. Did the website provide you with the information you were seeking?

	Frequency	Valid Percent
Yes	97	76.4
No	27	21.3
Don't know	3	2.4
Total	127	100.0

Q28. Would you be interested in being able to manage your Greater Sudbury Hydro account online?

	Frequency	Percent
Yes	143	35.8
No	248	62.0
Don't know	9	2.3
Total	400	100.0

Q29. From time to time, Sudbury Hydro attaches information to your bill in the form of a bill insert, or for electronic bill, in the form of a link. Using a scale from one very poor to five very good, how you would rate the overall quality of each of each of the bill inserts and other printed material you have received from Greater Sudbury Hydro?

	Frequency	Percent
1-very poor	12	3.0
2-poor	21	5.3
3-satisfactory	59	14.8
4-good	139	34.8
5-very good	106	26.5
No experience	39	9.8
Don't know	24	6.0
Total	400	100.0

Q30. Using a scale from one not at all interested to five very interested, how interested would you be in having Greater Sudbury Hydro provide information which could help your home save money by being more energy efficient?

	Frequency	Percent
1-not at all interested	18	4.5
2-not very interested	21	5.3
3-neither interested nor uninterested	48	12.0
4-somewhat interested	116	29.0
5-very interested	190	47.5
Don't know	7	1.8
Total	400	100.0

Q31. Using a scale from one very poor to five very good, how would you rate how easy it is to read and understand your power or utility bill?

	Frequency	Percent
1-very poor	35	8.8
2-poor	43	10.8
3-satisfactory	92	23.0
4-good	126	31.5
5-very good	96	24.0
Don't know	8	2.0
Total	400	100.0

Q32. What can Greater Sudbury Hydro do to better service its customers?

	Frequency	Percent
Lower rates	140	35.0
Don't know	102	25.5
Explain cost of energy on bills	29	7.3
Maintain rates / no increases	27	6.8
Make bills easier to understand / more clearer	23	5.8
Information on what is involved in the price of hydro	22	5.5
More information on how to save / conserve energy	21	5.3
Better communication	15	3.8
More information on alternative energy options	6	1.5
Incentives for reducing electricity	5	1.3
Fewer outages / quicker response to outages	5	1.3
Better hours of operation	3	.8
Improved peak times	2	.5
Total	400	100.0

“The money you pay for electricity goes to pay for three things including, 1) generating electricity at source, 2) transmitting electricity from where it is generated to Greater Sudbury Hydro and 3) locally delivering or distributing electricity from Greater Sudbury Hydro to your home / business.”

DSP Q1. Which of these do you think accounts for the greatest part of your bill?

	Frequency	Valid Percent
Generation,	75	18.8
Transmission	95	23.8
Local delivery	164	41.0
Don't know (not read)	66	16.5
Total	400	100.0

DSP Q2. Only the cost of the distribution, which is the local delivery, stays with Greater Sudbury Hydro to cover the cost of providing electricity to your home / business. Would you say that this amount is READ

	Frequency	Valid Percent
Under 20%	63	15.8
20% to 40%	77	19.3
41% to 60%;	60	15.0
61% to 80%	23	5.8
Or more than 80%	18	4.5
Don't know (not read)	159	39.8
Total	400	100.0

“Greater Sudbury Hydro is currently developing a five-year Distribution System Plan (DSP) that will assist in managing investments in all aspects of the electricity system that they operate. The Plan covers everything from replacing or upgrading parts of the system such as poles and transformers, ensuring access for new customers, providing new sources of green energy for homes / businesses, improving the system to manage outages more effectively and determining how resources will be most efficiently spent on equipment.”

“Using a scale from one not at all important to five very important please rate the importance of each of the following aspects of the plan to you as a customer.”[READ / ROTATE LIST]

DSP Q3. To maintain or improve on the current level of system reliability, keeping outages to as few as possible and as short as possible

	Frequency	Percent
1-Not at all important	4	1.0
2-Not important	7	1.8
3-Neither important nor unimportant	36	9.0
4-Important	122	30.5
5-Very important	213	53.3
Don't know	18	4.5
Total	400	100.0

DSP Q4. To maintain or improve on the current level of safety for it's employees and the public

	Frequency	Percent
1-Not at all important	14	3.5
2-Not important	5	1.3
3-Neither important nor unimportant	48	12.0
4-Important	75	18.8
5-Very important	221	55.3
Don't know	37	9.3
Total	400	100.0

DSP Q5. To enable the connection of renewable energy sources such as solar panels and wind generation to the electricity system

	Frequency	Percent
1-Not at all important	56	14.0
2-Not important	44	11.0
3-Neither important nor unimportant	69	17.3
4-Important	73	18.3
5-Very important	131	32.8
Don't know	27	6.8
Total	400	100.0

DSP Q6. To make efficient investments in the system to keep the cost of the local delivery of electricity as low as possible

	Frequency	Percent
1-Not at all important	9	2.3
2-Not important	6	1.5
3-Neither important nor unimportant	34	8.5
4-Important	72	18.0
5-Very important	270	67.5
Don't know	9	2.3
Total	400	100.0

The following final few questions involve collecting some personal [demographic] information. This information is statistically important for this survey and please be assured, once again, that all individual responses are kept in strict confidence.

D1. Which of the following age groups may I place you in?

	Frequency	Percent
18-34	97	24.3
35-54	144	36.0
55 or older	159	39.8
Total	400	100.0

D2. What is your combined family income?

	Frequency	Percent
Under \$50,000	110	27.5
Under \$75,000-\$50,000	103	25.8
Under \$100,000-\$75,000	82	20.5
\$100,000 or more	81	20.3
Refused	24	6.0
Total	400	100.0

D3. Gender (Do not ask)

	Frequency	Percent
Male	193	48.3
Female	207	51.8
Total	400	100.0

RESULTS BY QUESTION – BUSINESS

Q1. Considering all aspects of being a customer of Greater Sudbury Hydro, how would you rate your overall satisfaction with the company as your electrical services provider? Please respond using a scale from one very poor to five very good.

	Frequency	Percent
1-very poor	3	3.0
2-poor	3	3.0
3-satisfactory	16	16.0
4-good	36	36.0
5-very good	41	41.0
Don't know	1	1.0
Total	100	100.0

Q2. Using a scale from one very poor to five very good, how would you rate Greater Sudbury Hydro's customer service (i.e. being responsible and reliable) compared to other service providers such as your heating fuel, telephone company or your cable TV and satellite provider]?

	Frequency	Percent
1-very poor	4	4.0
2-poor	3	3.0
3-satisfactory	13	13.0
4-good	33	33.0
5-very good	43	43.0
Don't know	4	4.0
Total	100	100.0

Q3. Using a scale from one very poor to five very good, how would you rate your satisfaction with the price that you pay for electricity compared to what you pay for other [essential] services in your area [heating fuel, telephone company or your cable TV and satellite provider]?

	Frequency	Percent
1-very poor	19	19.0
2-poor	29	29.0
3-satisfactory	22	22.0
4-good	15	15.0
5-very good	10	10.0
Don't know	5	5.0
Total	100	100.0

Q4. Using the same scale from one very poor to five very good, how would you rate the overall value that Greater Sudbury Hydro provides?

	Frequency	Percent
1-very poor	7	7.0
2-poor	16	16.0
3-satisfactory	21	21.0
4-good	27	27.0
5-very good	24	24.0
Don't know	5	5.0
Total	100	100.0

I am now going to read some brief statements that may be used to describe Greater Sudbury Hydro. Using a scale from one strongly disagree to five strongly agree, please respond to each statement after it is read.

Q5. Greater Sudbury Hydro provides customers with reliable and good service

	Frequency	Percent
1-strongly disagree	2	2.0
2-somewhat disagree	4	4.0
3-neither agree nor disagree	13	13.0
4-somewhat agree	27	27.0
5-strongly agree	54	54.0
Total	100	100.0

Q6. Greater Sudbury Hydro is committed to effectively managing a balanced budget

	Frequency	Percent
1-strongly disagree	3	3.0
2-somewhat disagree	6	6.0
3-neither agree nor disagree	18	18.0
4-somewhat agree	14	14.0
5-strongly agree	5	5.0
Don't know	54	54.0
Total	100	100.0

Q7. Greater Sudbury Hydro meets its commitment to customers

	Frequency	Percent
1-strongly disagree	1	1.0
2-somewhat disagree	2	2.0
3-neither agree nor disagree	18	18.0
4-somewhat agree	49	49.0
5-strongly agree	30	30.0
Total	100	100.0

Q8. Greater Sudbury Hydro provides its customers with information about programs to help customers reduce their energy costs .

	Frequency	Percent
1-strongly disagree	4	4.0
2-somewhat disagree	6	6.0
3-neither agree nor disagree	13	13.0
4-somewhat agree	38	38.0
5-strongly agree	38	38.0
Don't know	1	1.0
Total	100	100.0

Q9. Greater Sudbury Hydro is concerned about public safety and safe work practices

	Frequency	Percent
1-strongly disagree	2	2.0
2-somewhat disagree	4	4.0
3-neither agree nor disagree	8	8.0
4-somewhat agree	20	20.0
5-strongly agree	44	44.0
Don't know	22	22.0
Total	100	100.0

Q10. Greater Sudbury Hydro invests in and gives back to the community (e.g. through sponsorship/donations; school safety program and support for other activities)

	Frequency	Percent
1-strongly disagree	4	4.0
2-somewhat disagree	7	7.0
3-neither agree nor disagree	19	19.0
4-somewhat agree	19	19.0
5-strongly agree	12	12.0
Don't know	39	39.0
Total	100	100.0

**Q11. Greater Sudbury Hydro encourages efficient use of electricity
among its customers**

	Frequency	Percent
1-strongly disagree	2	2.0
2-somewhat disagree	1	1.0
3-neither agree nor disagree	15	15.0
4-somewhat agree	30	30.0
5-strongly agree	50	50.0
Don't know	2	2.0
Total	100	100.0

Using a scale from one very poor to five very good, please rate the performance of Greater Sudbury Hydro in each of the following areas.

Q12. The reliability of power supply

	Frequency	Percent
1-very poor	2	2.0
2-poor	1	1.0
3-satisfactory	8	8.0
4-good	30	30.0
5-very good	59	59.0
Total	100	100.0

**Q13. Prompt response(s) to power outages when
they occur**

	Frequency	Percent
1-very poor	2	2.0
2-poor	3	3.0
3-satisfactory	11	11.0
4-good	41	41.0
5-very good	31	31.0
Don't know	12	12.0
Total	100	100.0

Q14. Effectively scheduling planned power outages

	Frequency	Valid Percent
1-very poor	3	3.0
2-poor	3	3.0
3-satisfactory	7	7.0
4-good	11	11.0
5-very good	30	30.0
Don't know	46	46.0
Total	100	100.0

**Q15. Effectively communicating with customers
about planned power interruptions in your area**

	Frequency	Percent
1-very poor	1	1.0
2-poor	1	1.0
3-satisfactory	9	9.0
4-good	14	14.0
5-very good	26	26.0
Don't know	49	49.0
Total	100	100.0

Q16. I am going to ask your opinion on the issue of balancing the price you pay for maintenance and renewal of your local electricity infrastructure with the security of your electricity service delivery or "keeping the lights on".

Please respond on a scale from one having the lowest rates possible with regular outages to five having the highest rates possible with no outages – 3 would be a balance between rates and outages.”

	Frequency	Percent
1-lowest rates regular outages	3	3.0
2-low rates occasional outages	4	4.0
3-balance between rates and outages	69	69.0
4-high rates only a few outages	9	9.0
5-highest rates no outages	1	1.0
Don't know	14	14.0
Total	100	100.0

Please tell me if you are interested in each of the following payment options for your electricity bills.

Q17A. Online/telephone banking through your financial institution

	Frequency	Percent
Yes	62	62.0
No	38	38.0
Total	100	100.0

Q17B. Online at Sudbury Hydro Website

	Frequency	Percent
Yes	22	22.0
No	78	78.0
Total	100	100.0

Q17D Automatic withdrawal from your bank account

	Frequency	Percent
Yes	37	37.0
No	63	63.0
Total	100	100.0

Q17E. Equal monthly payment plan

	Frequency	Percent
Yes	56	56.0
No	44	44.0
Total	100	100.0

Q17E. Payment at the Greater Sudbury

Hydro office

	Frequency	Percent
Yes	16	16.0
No	84	84.0
Total	100	100.0

IF MULTIPLE RESPONSES PROVIDED IN Q17 ASK Q18

Q18. Of those options what would be your preferred method of payment

	Frequency	Percent
Online/telephone banking through your financial institution	26	40.0
Online at Sudbury Hydro Website	4	6.2
Automatic withdrawal from your bank account	18	27.7
Equal monthly payment plan	16	24.6
Payment at the Greater Sudbury Hydro office	1	1.5
Total	65	100.0

Q19. Do you currently receive your hydro bill electronically?

	Frequency	Percent
Yes	23	23.0
No	77	77.0
Total	100	100.0

IF NO ASK Q20 / IF YES SKIP TO Q21

Q20. Would you be interested in receiving your bill electronically?

	Frequency	Percent
Yes	35	45.5
No	42	54.5
Total	77	100.0

Q21. Greater Sudbury Hydro communicates to its customers through a variety of methods including bill inserts, direct mail, its website, newspapers and radio. Please rate the performance of Greater Sudbury Hydro in communicating with its customers using a scale from one very poor to five very good?

	Frequency	Percent
1-very poor	3	3.0
2-poor	1	1.0
3-satisfactory	26	26.0
4-good	46	46.0
5-very good	20	20.0
Don't know	4	4.0
Total	100	100.0

Q22. What is your preferred method to have Greater Sudbury Hydro communicate information to you?

	Frequency	Percent
E-mail from the company	38	38.0
Bill inserts	22	22.0
Direct mail	17	17.0
Greater Sudbury Hydro Website	10	10.0
Telephone	5	5.0
Social Media	3	3.0
Don't know/no preference	3	3.0
Customer newsletter	2	2.0
Total	100	100.0

Q23. And as a customer, what is your preferred method that you would like to communicate with Greater Sudbury Hydro?

	Frequency	Valid Percent
Telephone	55	55.0
Email	32	32.0
Social media	6	6.0
Link or form on Greater Sudbury Hydro Website	6	6.0
Don't know/no preference	1	1.0
Total	100	100.0

Q24. Have you visited the Greater Sudbury Hydro website within the past 12 months?

	Frequency	Percent
Yes	36	36.0
No	64	64.0
Total	100	100.0

IF YES ASK Q25 / IF NO SKIP TO Q28

Q25. How would you rate the quality of the information provided on the Greater Sudbury Hydro website?

	Frequency	Percent
1-very poor	1	2.8
2-poor	1	2.8
3-satisfactory	5	13.9
4-good	16	44.4
5-very good	13	36.1
Total	36	100.0

Q26. What information did you look for?

(Multiple Responses Accepted)

	Responses	
	N	Percent
Account information	17	37.0%
Rates & Fees	8	17.4%
Corporate info	4	8.7%
Energy conservation	11	23.9%
Contact information	2	4.3%
Power outages	3	6.5%
Grants for energy efficiency upgrades	1	2.2%
Total	46	100.0%

Q27. Did the website provide you with the information you were seeking?

	Frequency	Percent
Yes	27	75.0
No	9	25.0
Total	36	100.0

Q28. Would you be interested in being able to manage your Greater Sudbury Hydro account online?

	Frequency	Percent
Yes	64	64.0
No	33	33.0
Don't know	3	3.0
Total	100	100.0

Q29. From time to time, Sudbury Hydro attaches information to your bill in the form of a bill insert, or for electronic bill, in the form of a link. Using a scale from one very poor to five very good, how you would rate the overall quality of each of the bill inserts and other printed material you have received from Greater

Sudbury Hydro?

	Frequency	Percent
1-very poor	3	3.0
2-poor	4	4.0
3-satisfactory	18	18.0
4-good	29	29.0
5-very good	31	31.0
No experience	11	11.0
Don't know	4	4.0
Total	100	100.0

Q30. Using a scale from one not at all interested to five very interested, how interested would you be in having Greater Sudbury Hydro provide Information which could help your business save money by being more energy efficient

	Frequency	Percent
3-neither interested nor uninterested	11	11.0
4-somewhat interested	23	23.0
5-very interested	64	64.0
Don't know	2	2.0
Total	100	100.0

Q31. Using a scale from one very poor to five very good, how would you rate how easy it is to read and understand your power or utility bill?

	Frequency	Percent
1-very poor	4	4.0
2-poor	9	9.0
3-satisfactory	23	23.0
4-good	30	30.0
5-very good	34	34.0
Total	100	100.0

Q32. What can Greater Sudbury Hydro do to better service its customers?

	Frequency	Percent
Lower rates	38	38.0
Don't know	14	14.0
Information on what is involved in the price of hydro	13	13.0
Maintain rates / no increases	12	12.0
Explain cost of energy on bills	10	10.0
Make bills easier to understand / more clearer	6	6.0
Fewer outages / surges	2	2.0
Quicker response times / faster service	2	2.0
Better hours of operation	1	1.0
More information / notice about power outages	1	1.0
Better communication	1	1.0
Total	100	100.0

“The money you pay for electricity goes to pay for three things including, 1) generating electricity at source, 2) transmitting electricity from where it is generated to Greater Sudbury Hydro and 3) locally delivering or distributing electricity from Greater Sudbury Hydro to your home / business.”

DSP Q1. Which of these do you think accounts for the greatest part of your bill?

	Frequency	Percent
Generation,	15	15.0
Transmission	40	40.0
Local delivery	32	32.0
Don't know (not read)	13	13.0
Total	100	100.0

DSP Q2. Only the cost of the distribution, which is the local delivery, stays with Greater Sudbury Hydro to cover the cost of providing electricity to your home / business. Would you say that this amount is READ

	Frequency	Percent
Under 20%	7	7.0
20% to 40%	17	17.0
41% to 60%;	30	30.0
61% to 80%	15	15.0
Or more than 80%	9	9.0
Don't know (not read)	22	22.0
Total	100	100.0

“Greater Sudbury Hydro is currently developing a five-year Distribution System Plan (DSP) that will assist in managing investments in all aspects of the electricity system that they operate. The Plan covers everything from replacing or upgrading parts of the system such as poles and transformers, ensuring access for new customers, providing new sources of green energy for homes / businesses, improving the system to manage outages more effectively and determining how resources will be most efficiently spent on equipment.”

“Using a scale from one not at all important to five very important please rate the importance of each of the following aspects of the plan to you as a customer.”[READ / ROTATE LIST]

DSP Q3. To maintain or improve on the current level of system reliability, keeping outages to as few as possible and as short as possible

	Frequency	Percent
3-Neither important nor unimportant	5	5.0
4-Important	36	36.0
5-Very important	57	57.0
Don't know	2	2.0
Total	100	100.0

DSP Q4. To maintain or improve on the current level of safety for it's employees and the public

	Frequency	Valid Percent
1-Not at all important	1	1.0
2-Not important	2	2.0
3-Neither important nor unimportant	7	7.0
4-Important	50	50.0
5-Very important	35	35.0
Don't know	5	5.0
Total	100	100.0

DSP Q5. To enable the connection of renewable energy sources such as solar panels and wind generation to the electricity system

	Frequency	Percent
1-Not at all important	13	13.0
2-Not important	17	17.0
3-Neither important nor unimportant	19	19.0
4-Important	28	28.0
5-Very important	16	16.0
Don't know	7	7.0
Total	100	100.0

DSP Q6. To make efficient investments in the system to keep the cost of the local delivery of electricity as low as possible

	Frequency	Percent
3-Neither important nor unimportant	2	2.0
4-Important	40	40.0
5-Very important	57	57.0
Don't know	1	1.0
Total	100	100.0