

# Annual Customer Survey Report – 2017

*Prepared by:*



*For:*



*December 2017*

# TABLE OF CONTENTS

|  |    |           |
|--|----|-----------|
| <b>METHODOLOGY &amp; LOGISTICS</b>     |    | <b>2</b>  |
| <b>EXECUTIVE SUMMARY – RESIDENTIAL</b> |    | <b>3</b>  |
| SATISFACTION                           | 3  |           |
| CUSTOMER SERVICE                       | 4  |           |
| PRICE & VALUE                          | 5  |           |
| RATING GREATER SUDBURY HYDRO           | 8  |           |
| RATING PERFORMANCE                     | 9  |           |
| RATES VS OUTAGES                       | 10 |           |
| PAYMENT OPTIONS                        | 11 |           |
| COMMUNICATION                          | 13 |           |
| WEBSITE                                | 15 |           |
| BILL INSERTS / LINKS                   | 17 |           |
| ENERGY EFFICIENCY                      | 18 |           |
| BILLING – EASE OF UNDERSTANDING        | 19 |           |
| IMPROVEMENT COMMENTS                   | 20 |           |
| DISTRIBUTION SYSTEM PLANNING           | 21 |           |
| <b>EXECUTIVE SUMMARY – BUSINESS</b>    |    | <b>23</b> |
| SATISFACTION                           | 23 |           |
| CUSTOMER SERVICE                       | 24 |           |
| PRICE & VALUE                          | 25 |           |
| RATING GREATER SUDBURY HYDRO           | 28 |           |
| RATING PERFORMANCE                     | 29 |           |
| RATES VS OUTAGES                       | 30 |           |
| PAYMENT OPTIONS                        | 31 |           |
| COMMUNICATION                          | 32 |           |
| WEBSITE                                | 34 |           |
| BILL INSERTS / LINKS                   | 36 |           |
| ENERGY EFFICIENCY                      | 37 |           |
| BILLING – EASE OF UNDERSTANDING        | 38 |           |
| IMPROVEMENT COMMENTS                   | 39 |           |
| DISTRIBUTION SYSTEM PLANNING           | 40 |           |

# METHODOLOGY & LOGISTICS

## OVERVIEW

- This report represents the findings from a December 2017 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, December 2015 and December 2016 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 November 16<sup>th</sup> to November 30<sup>th</sup>, 2017.
- 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

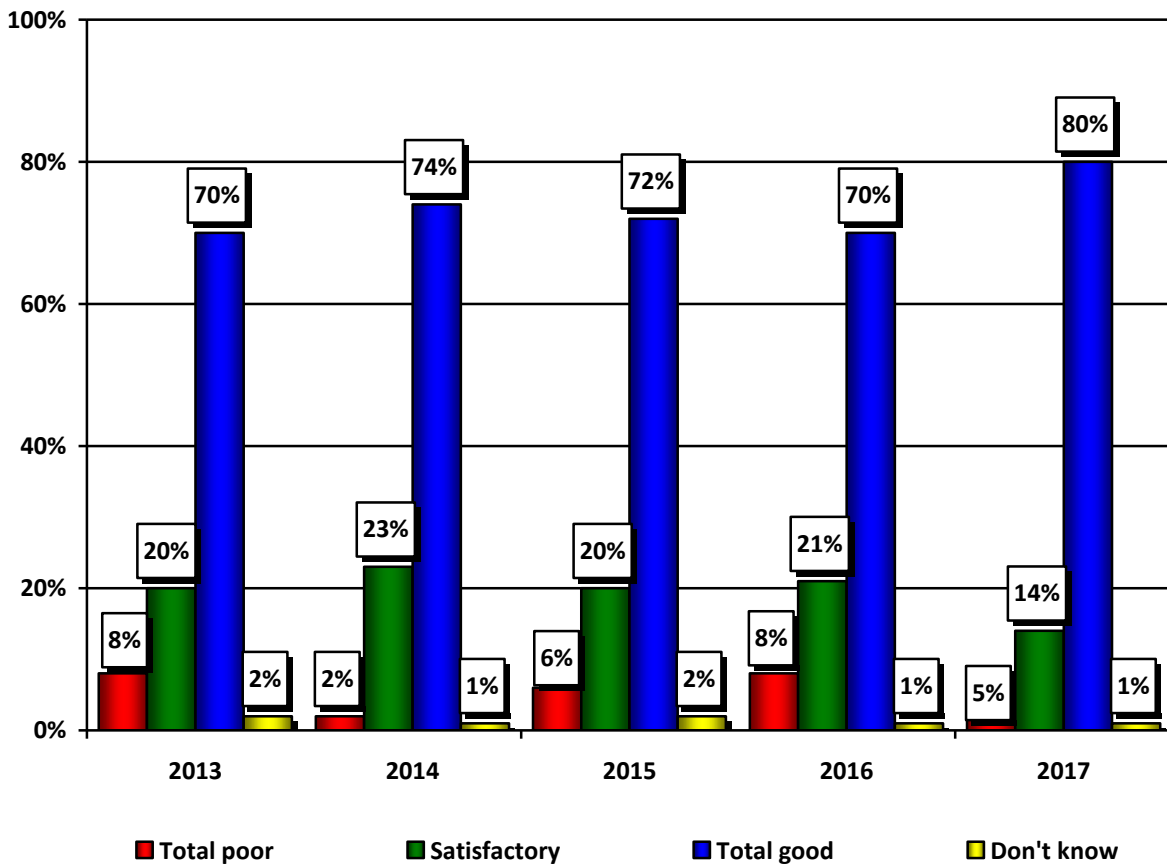
- The margin of error for the N=400-person residential survey is  $\pm 4.9\%$ , 19/20 times and  $\pm 9.8\%$ , 19/20 times for the sample of N=100 businesses.

# RESIDENTIAL EXECUTIVE SUMMARY

## SATISFACTION

Respondents were first asked the following overall satisfaction question. The following graph compares the December 2017 results with the previous four 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?"**



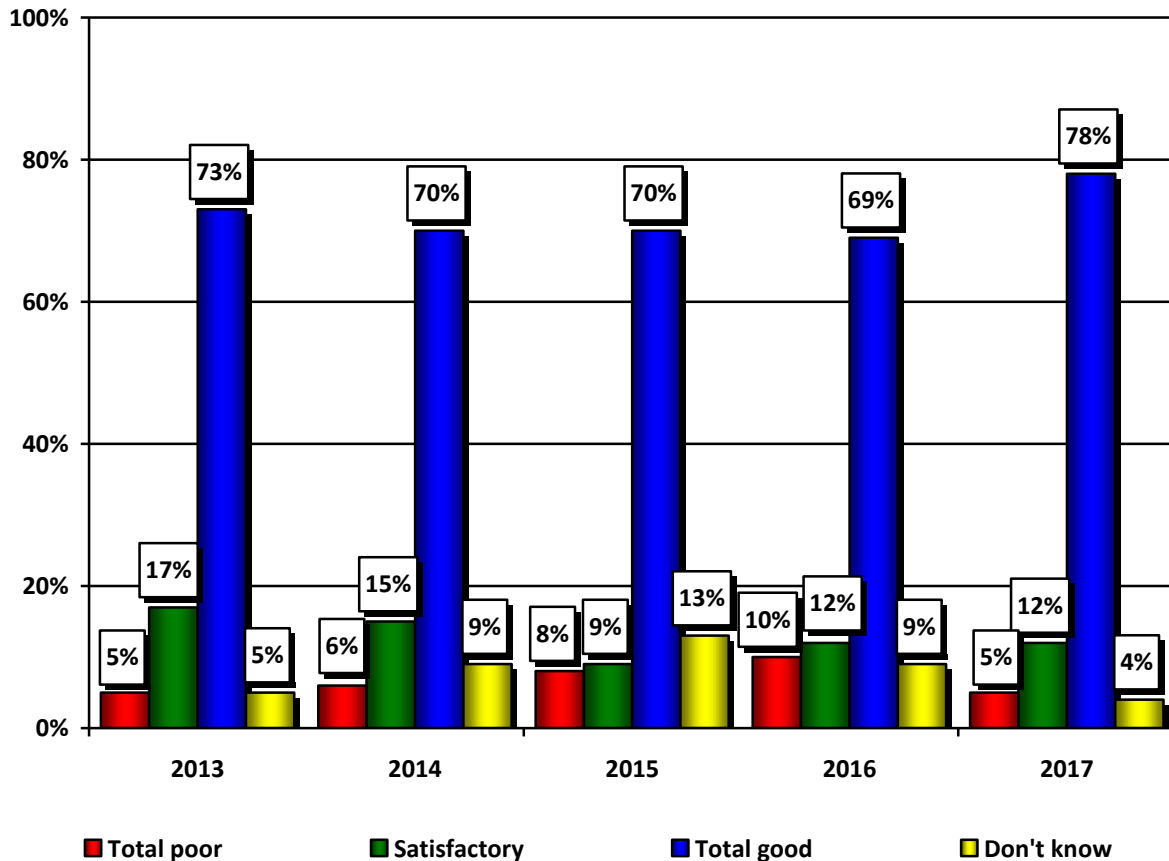
Eight in ten or 80% of customers surveyed are satisfied with GSH as their electrical service provider, with 38% giving a response of good and 42% very good, compared to the total poor (dissatisfied) response of 5%, while 14% had a neutral or satisfactory opinion. This represents a significant 10% improvement over the 2016 positive (good and very good) rating.

The lowest earners (under \$50,000) were most satisfied at 87% in relation to those earning \$50,000-\$74,999 (76%), \$75,000-\$99,999 (73%) and over \$100,000 (79%) per annum, as were the oldest 55+ (86%) and youngest 18-34 (80%), compared to those 35-54 (74%).

## 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, phone providers or your cable TV or satellite companies?"**



The comparative service indicator total positive score of good (39%) and very good (39%) is 78%, an increase of 8% compared to 2016. While the percentage of undecided's (don't know) fell by -5% over 2016 and the poor or very poor score dropped to 5% (-5%), the neutral or satisfactory rating of 12% remained stable.

The lowest earners in the under \$50,000 cohort were most satisfied (83%), next by those in the \$100,000+ range (79%) and then respondents in the \$50,000-\$74,999 (73%) and \$75,000-\$99,000 (72%) income ranges. Older customers 55+ provided the highest positive score (88%), in relation to those 18-34 (74%) and 35-54 (71%). More females (85%) were also more likely to provide a good or very good rating in relation to males (72%).

## PRICE & VALUE

In a new question in this 2017 survey, respondents were asked about how they review their monthly bill. They were first read the following short statement after which they were asked how closely they look at their statement.

*“In addition to providing you with your monthly Greater Sudbury Hydro electricity bill, Greater Sudbury Utilities also bills water and wastewater on behalf of the City of Greater Sudbury.”*

**Q3. “Do you review this combined statement to analyze its separate electricity and water costs, or only look at the total, which combines both electricity and water/wastewater charges?”**

|  |   | Percent |
|--|---|---------|
|  | Review separate parts of combined statement | 64%     |
|  | Only look at total                          | 26%     |
|  | Don't know                                  | 10%     |

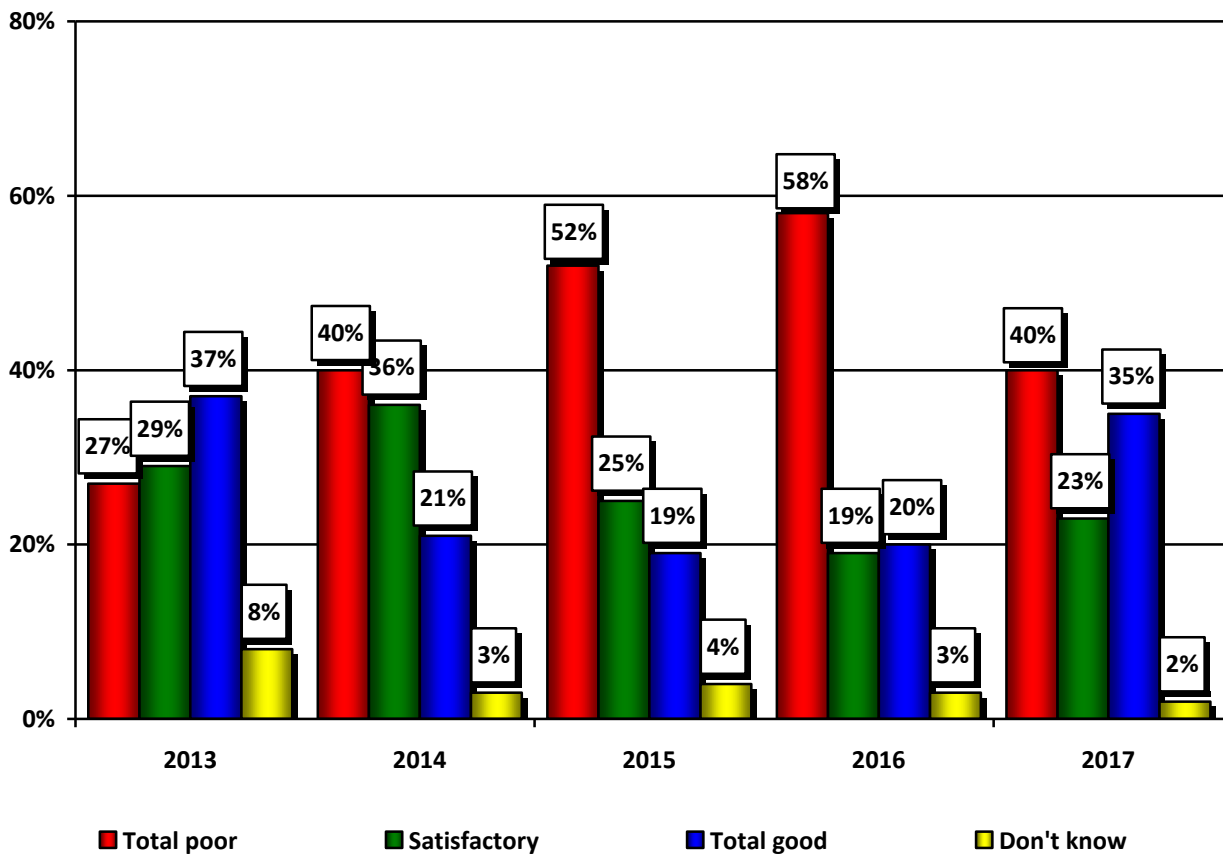
In total, 64% claim that they review or analyze their billing statements for separate water and electricity costs, while 26% said they look only at the total and 10% answered that they did not know. Those earning the least or under \$50,000 (71%) a year are most likely to review their bill in detail, as are customers 55+ (73%) and 35-54 (68%), compared to younger respondents 18-34 (43%).

Prior to questions related to the cost of electricity that were asked, respondents were read the following short statement.

*“When answering the next two questions, I would like you to only consider the electricity cost you pay on your monthly utility bill.”*

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

**Q4.** *“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, phone provider or your cable TV and satellite companies)?”*

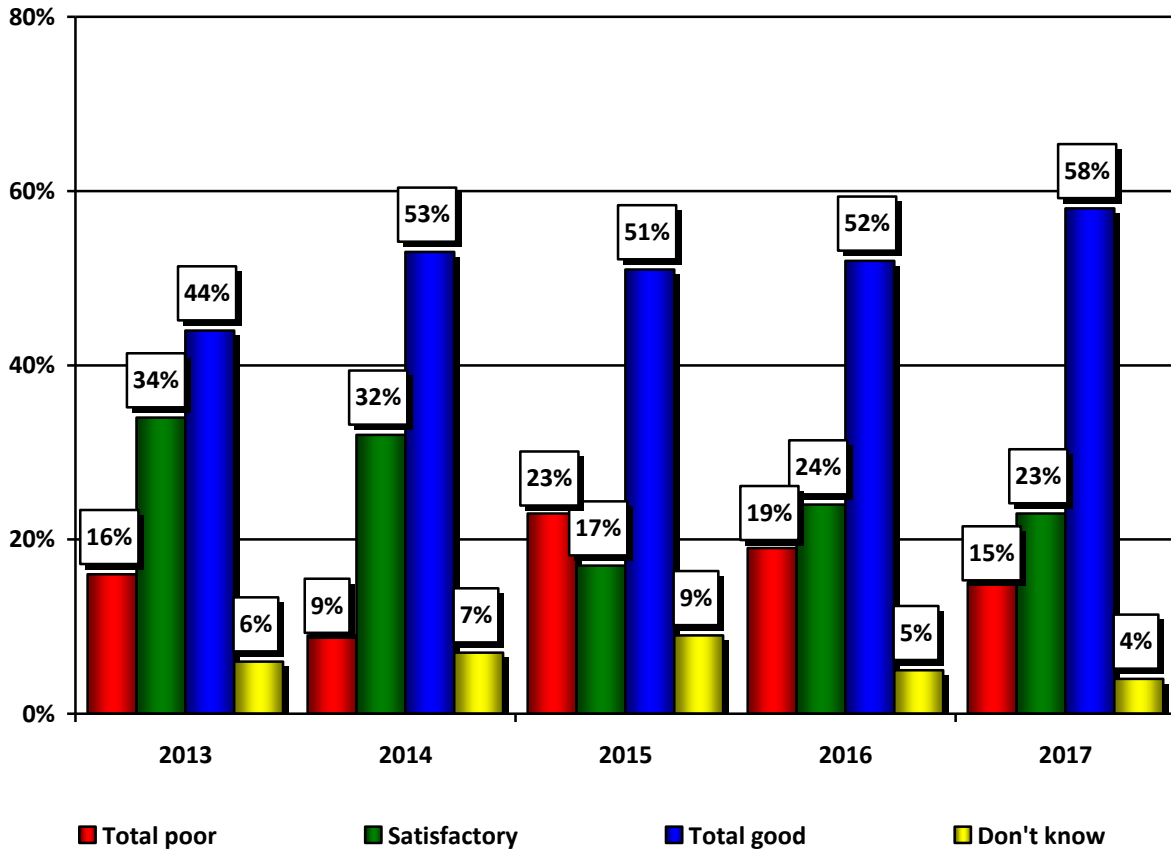


There has been a significant decrease of -18% in the percentage of customers that are dissatisfied with the cost of electricity in relation to other services in this 2017 survey period (40%), compared to 2016 (58%). As well, a corresponding +15% improvement in the good and very good score was registered (35% versus 20% in 2016), while the neutral rating also increased +4% to 23% and the unsure responses remained consistent as 2%

Satisfaction or total good replies were highest among those 55+ at 42% (35 to 54 – 31% & 18 to 34 – 27%) and lower earners in the under \$50,000 (45%) and \$50,000-\$74,999 (45%) ranges and among more males (42%) in relation to females (28%).

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

**Q5. "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 also improved as almost six in ten or 58% provided a positive rating compared to 52% in 2016 (+6%). The total poor score is now at a five year low at 15% (-4%), while a similar 23% (24% in 2016) accorded a neutral score and 4% (-1%) were unsure.

Most satisfied (total good) were those 55+ (71%), respondents in the \$75,000 to \$99,000 cohort (74%) and more males (64%) than females (52%).



## RATING GREATER SADBURY 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 4-agree and 5-strongly agree and compares the results over time. Results are also ranked in terms of 2017 level of agreement – from highest to lowest.

*“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<br>(Somewhat & Strongly)   | 2013 | 2014 | 2015 | 2016 | 2017       |
|---|------|------|------|------|------------|
| Q6. Greater Sudbury Hydro provides customers with reliable and good service.                                | 77%  | 75%  | 73%  | 72%  | <b>79%</b> |
| Q8. Greater Sudbury Hydro meets its commitment to customers.  | 80%  | 76%  | 75%  | 73%  | <b>78%</b> |
| Q12. Greater Sudbury Hydro encourages efficient use of electricity among its customers.                     | 62%  | 72%  | 74%  | 71%  | <b>75%</b> |
| Q9. GSH provides its customers with information about programs to help customers reduce their energy costs. | 58%  | 71%  | 61%  | 59%  | <b>65%</b> |
| Q10. Greater Sudbury Hydro is concerned about public safety and safe work practices.                        | 48%  | 63%  | 54%  | 60%  | <b>62%</b> |
| Q7. Greater Sudbury Hydro is committed to effectively managing a balanced budget.                           | 25%  | 33%  | 32%  | 29%  | <b>30%</b> |
| Q11. Greater Sudbury Hydro invests in and gives back to the community.                                      | 22%  | 28%  | 26%  | 30%  | <b>28%</b> |

Respondents rated Greater Sudbury Hydro highest in terms of agreement at 79% for providing customers with reliable and good service, 7% higher (79%) compared to 2016, closely followed by providing meeting its commitment to customers at 78% (+5% in relation to 2016) and for encouraging the efficient use of electricity at 75% (+4% over 2016). The next strongest rated agreement area was for GSH providing customers with information about programs to reduce energy costs (65%), which also increased in this survey period over the previous by +6% (65%) and for being concerned about public safety and safe work practises at 62%, which saw a positive gain of +2%, but 26% answered do not know (unsure) to the safety indicator. The lowest agreement ratings continue to be for investing in and giving back to the community at 28%, a 2% decrease compared to 2015 and for effectively managing a balanced budget at 30% (+1%). 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 (44% and 37% 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 | 2017       |
|--|------|------|------|------|------------|
| Q13. The reliability of power supply   | 83%  | 92%  | 90%  | 88%  | <b>89%</b> |
| Q14. Prompt responses to power outages when they occur                                       | 72%  | 82%  | 81%  | 84%  | <b>86%</b> |
| Q15. Effectively scheduling planned power outages  | 57%  | 54%  | 66%  | 64%  | <b>70%</b> |
| Q16. Effectively communicating with customers about planned power interruptions in your area | 55%  | 56%  | 68%  | 66%  | <b>63%</b> |

The highest rated indicator continues to be for the reliability of the power supply at 89% consistent with 2016, although slightly higher (+1%), next for providing prompt responses to outages at 86% which increased compared to 2016 by +2%. In total, 70% accorded a good or very good score for effectively scheduling planned power outages, a 6% gain and lowest at 63% for communicating about planned power interruptions, a -3% drop. While the poor or very poor results for communicating (6%) and scheduling planned outages (3%) were low, answers of do not know were elevated for these two areas (24% and 23% 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.

**Q17. "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 | 2017 |
|---|------|------|------|------|------|
| 1-lowest rates – regular outages                | 2%   | 4%   | 4%   | 3%   | 2%   |
| 2-low rates – occasional outages                | 15%  | 3%   | 8%   | 7%   | 5%   |
| 3-neutral – a balance between rates and outages | 44%  | 55%  | 47%  | 54%  | 59%  |
| 4-high rates – only a few outages               | 15%  | 13%  | 11%  | 12%  | 11%  |
| 5-highest rates – no outages                    | 3%   | 5%   | 6%   | 5%   | 8%   |
| Don't know                                      | 22%  | 21%  | 24%  | 19%  | 15%  |

With the cost of electricity less of a concern to GSH customers, more are now willing to have balance between rates and outages (+5% compared to 2016) at 59%. Slightly fewer in this survey period said that they want the lowest or low rates with some form of acceptable outage (-3%), more claimed that high or the highest rates with fewer or no outages is their preference (+2%) and less or -4% were unsure.

## PAYMENT OPTIONS

Respondents were read a series of five payment options and were asked about their interest in each one.

**Q18. "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 | 2017 |
|---|------|------|------|------|------|
| Online / telephone banking                  | 65%  | 48%  | 54%  | 58%  | 65%  |
| Equal monthly payment plan                  | 40%  | 47%  | 46%  | 54%  | 56%  |
| Automatic withdrawal from your bank account | 43%  | 52%  | 49%  | 51%  | 53%  |
| Online at the Sudbury Hydro Website         | 20%  | 15%  | 19%  | 25%  | 26%  |
| Payment at the Greater Sudbury Hydro office | 23%  | 10%  | 13%  | 12%  | 10%  |

The payment method of most interest was online or telephone banking by 65%, a 7% increase over 2016, with interest in this option strongest among those 18-34 years old's (86%), followed by those 35-54 (71%), but by a lesser 46% of respondents 55+. The option of next highest interest was for an equal monthly payment plan by 56% (+2%), followed by automatic withdrawal at 53% (+2%). Equal payments most appealed to those 35-54 (61%) and 18-34 (56%), while automatic withdrawal was most popular with older customers 55+ (57%). A lesser 26% said that they prefer payment online through the GSH website – consistent with 2016, but interest in payment at the GSH office remains low at 10% (-2%). Younger 18-34-year olds were more inclined to express interest in payment through the website (44%) and the oldest 55+ in making a payment at the GSH office (16%).

Customers that expressed interest in multiple payment options in Q18 (N=272), were then asked a follow-up question (Q19) about their most preferred method of payment.

**Q19. "Of those options what would be your preferred method of payment?"**

|   | Percent |
|---|---------|
| Online/telephone banking through your financial institution | 36%     |
| Automatic withdrawal from your bank account                 | 35%     |
| Equal monthly payment plan                                  | 22%     |
| Payment at the Greater Sudbury Hydro office                 | 4%      |
| Online at Sudbury Hydro Website                             | 3%      |

The most preferred options of payment were online or telephone banking (36%) and automatic withdrawal (35%), followed by equal monthly payments, while only 4% named an GSH office payment and 3% the GSH website.

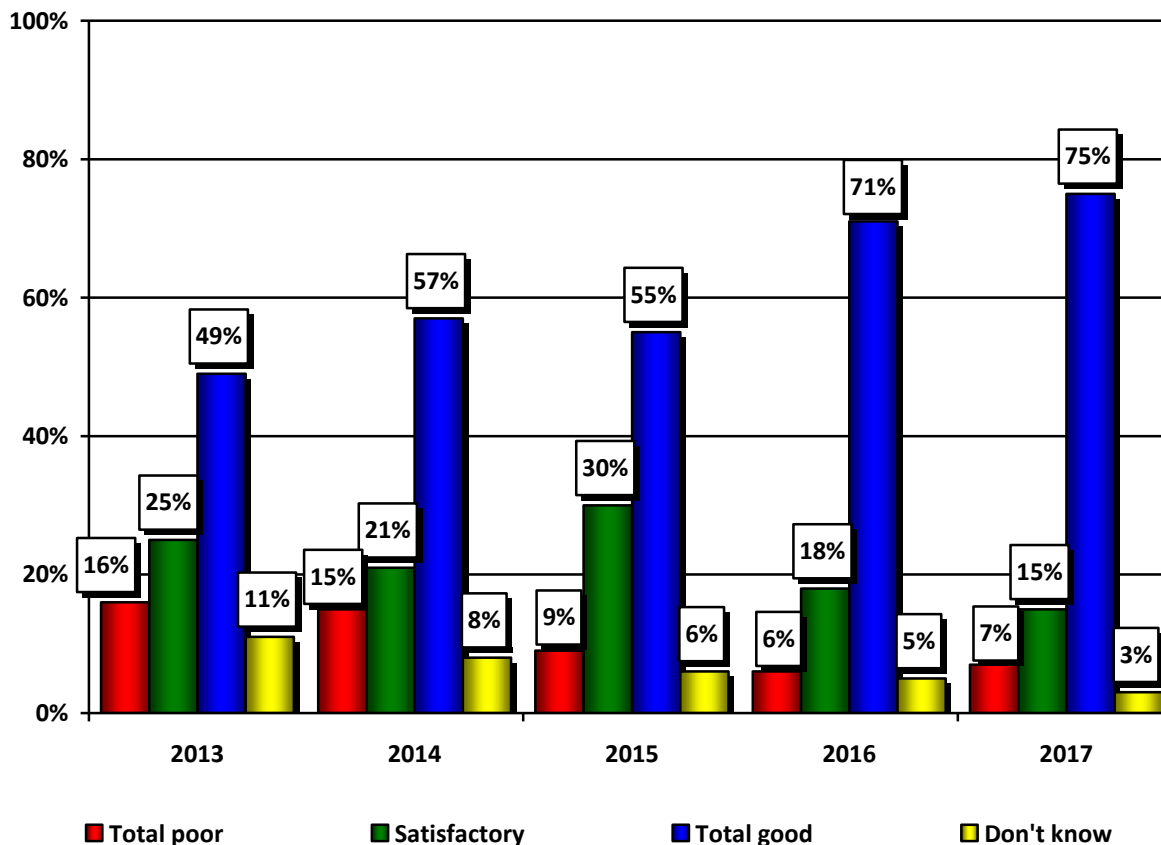
When asked **if they currently receive their hydro bill electronically (Q20)**, 26% said that they do, compared to 20% in 2016, 17% in 2015 and 15% in 2014. Younger customers 18-34 (44%) most get an electronic bill as do higher earners in the under \$100,000-\$75,000 (33%) and \$100,000+ (35%) income ranges.

**The 74% (N=295) that do not currently receive an electronic statement were asked if they would be interested in receiving an E-bill (Q21)**. A total of 22% claimed that they would favour getting an electronic statement (24% in 2016), with 18-34-year olds being most interested (43%).

## COMMUNICATION

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

**Q22. "Greater Sudbury Hydro communicates to its customers through a variety of methods including bill inserts, direct mail, social media, 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 another improvement in the overall communications rating in this survey wave as three-quarters or 75% provided a good or very good rating, an increase of 4% compared to 2016. While the negative or total poor score slightly increased to 7% (+1%), fewer answered do not know (-2%) or neutral or satisfactory (-3%). Those in the mid-aged cohort of 35-54 expressed the highest satisfaction (82%), followed by those 55 or older (72%) and then millennials aged 18-34 (68%).

Respondents were asked in an open ended unaided question about their **preferred method to have Greater Sudbury Hydro communicate information to them (Q23)**. One top of mind response was accepted with the top mentions including email by 27% (26% in 2016), next by bill inserts by 20% (-5% lower than 2016), direct mail by 19% (also -5% lower) and social media by 18% (+8% higher than the 10% in 2016). The GSH website was named by 8% (7% in 2016), with the remaining responses spread among the customer newsletter (2%), newspapers (1%), radio (1%) and telephone (1%), while 4% did not know or had no preference. Customers 18-34 years old most preferred emails (42%) and social media (37%), those 35-54 emails (39%) and social media (19%), while clients 55+ tended to favour bill inserts (37%) and direct mail (33%).

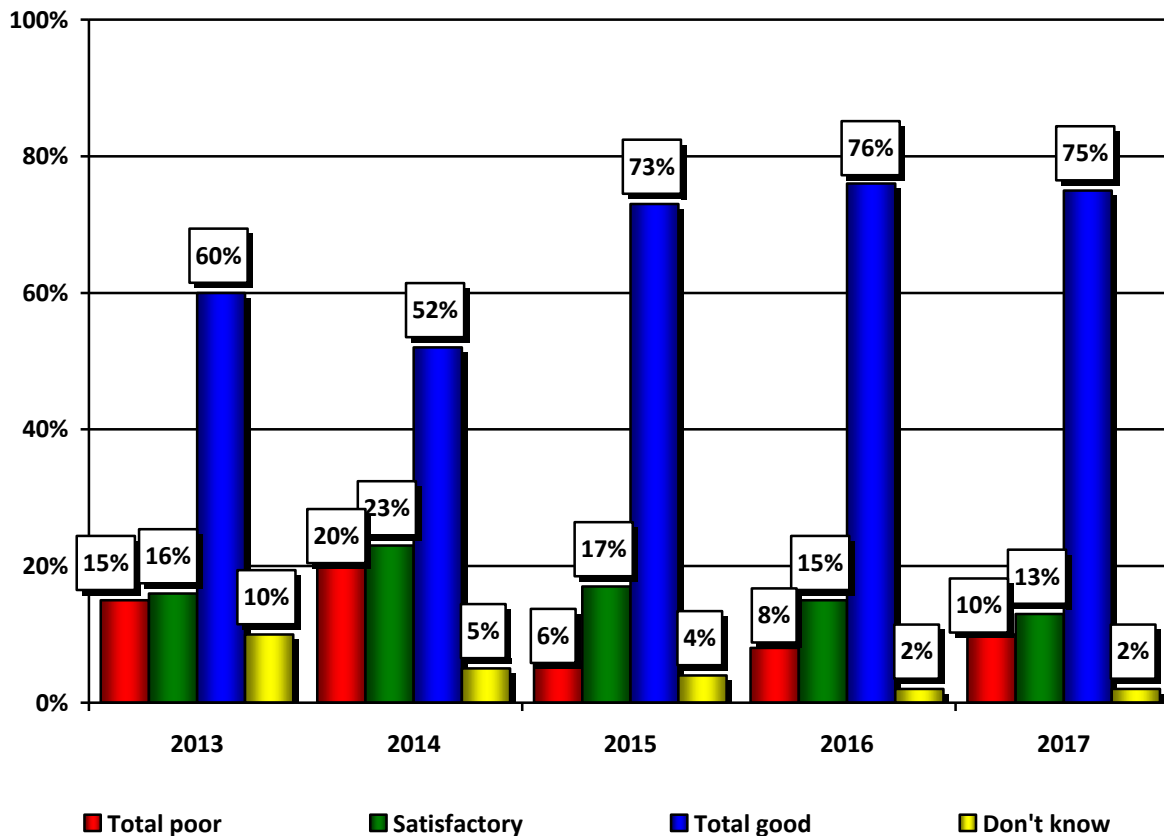
In another open or unaided question, residential customers were asked about **how they would most like to communicate with GSH (Q24)**. When wanting to initiate communication with GSH, telephone remains the preferred approach by 51% albeit -5% lower compared to 2016 (56%). Email was next most named by 25% (+3%), followed by social media at 12% (+4%) and in person at the GSH office by 8% (9% in 2016). Other lesser named options included a link through the GSH website (3%) and regular mail (1%), while 1% were unsure or had no preference. Those 55+ tended to name telephone (59%) and in person visits (18%), 35-54-year olds the telephone (59%) and emails (24%), while 18-34-year olds a mix of email (45%), social media (28%) and telephone (25%).

## 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 (Q25)**. More than one-third or 34% claimed to have been to the website in the last year, compared to 32% in 2016, 21% in 2015 and 27% in 2014. Those in the 18-34 (47%) and 35-54 year-old cohorts (40%) were most likely to have visited compared to customers 55+ (21%).

The 34% (N=136) that visited the site were then asked three follow up questions on the information that it contains.

**Q26. "How would you rate the quality of the information provided on the Greater Sudbury Hydro website?"**



Website quality of information results have remained consistent over the past three survey touch points satisfaction or good and very good scores ranging from 73% to 76% – with this year being in the mid-point at 75%.



In a question allowing for multiple responses, website visitors (34% N=136) were also asked **about the information that they were looking for (Q27)**. Account information represented 35% of the combined N=161 responses, followed by energy conservation (26%) and rates and fees (17%). Other mentions included information about outages (7%), news / developments (6%), contact information (4%), corporate information (2%), reporting an issue (3%) and info on the environment or safety (1%).

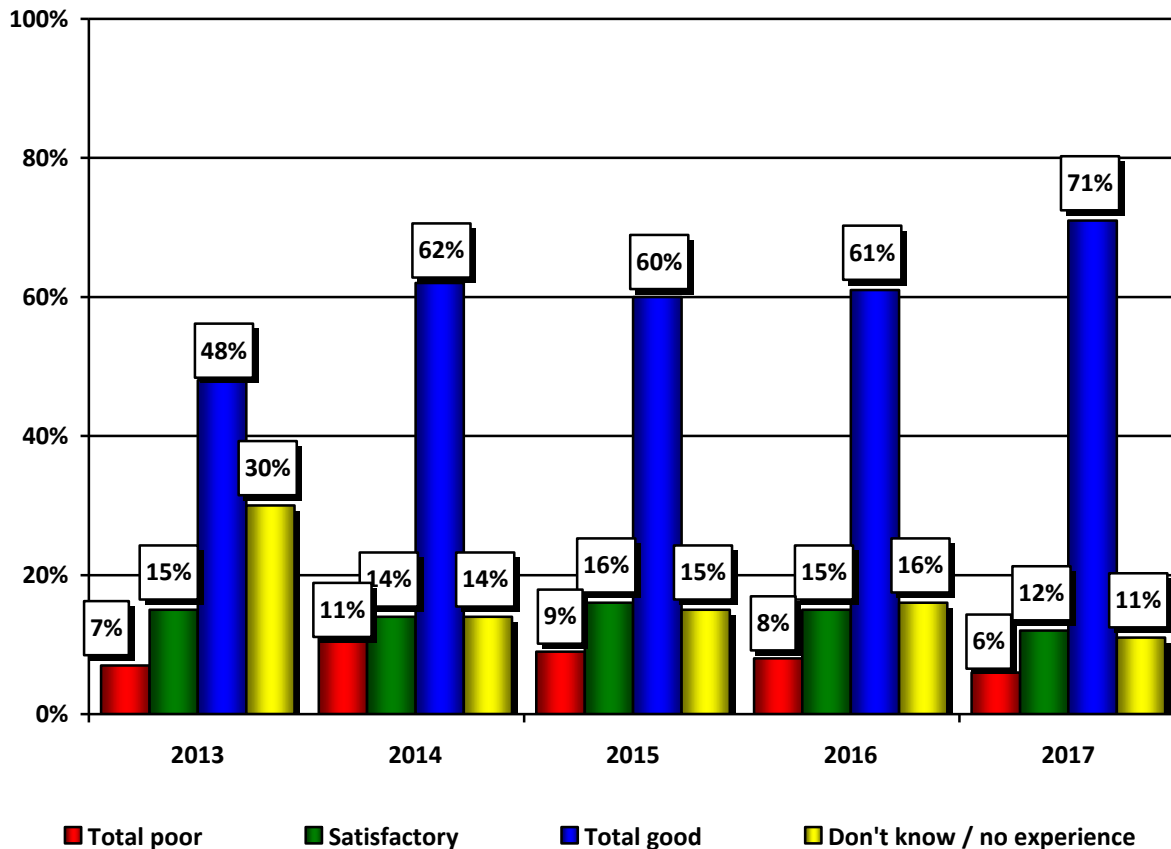
In a final website rating question, visitors (N=127) were asked **if they found the information that they were looking for (Q28)**, of which 74% said that they did, compared to 76% in 2016, 81% in 2015 and 71% in 2014.

All residential respondents (N=400) were then questioned as to whether **they would be interested in managing their GSH account online (Q29)**. In total, 38% of customers would be interested in managing their accounts online (36% in 2016), 61% would not and 2% were unsure. Interest was highest among 18-34 year old's (69%), followed by those 35-54 (42%), but lower among customers 55 or older (14%).

## BILL INSERTS / LINKS

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

**Q30. "From time to time, Sudbury Hydro attaches information to your bill in the form of a bill insert, or for electronic bills 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 / links and other material you have received from Greater Sudbury Hydro?"**

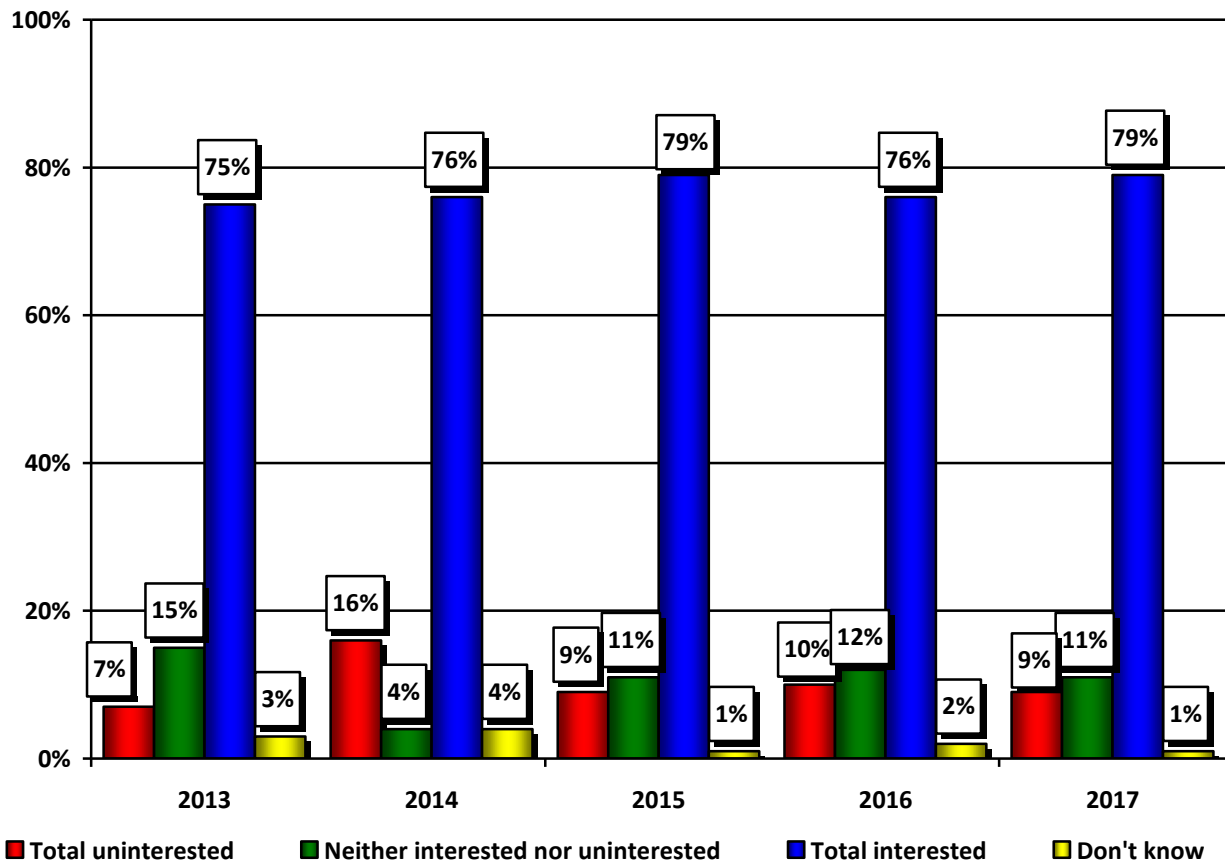


There was a significant 10% improvement in the top two positive rating of good and very good in this survey to 71% from 61% in 2016. There were corresponding decreases in the poor or very poor score (-2%) and the neutral or satisfactory scores (-3%) as well as for do not know / no experience (-5%).

## ENERGY EFFICIENCY

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

**Q31. "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?"**

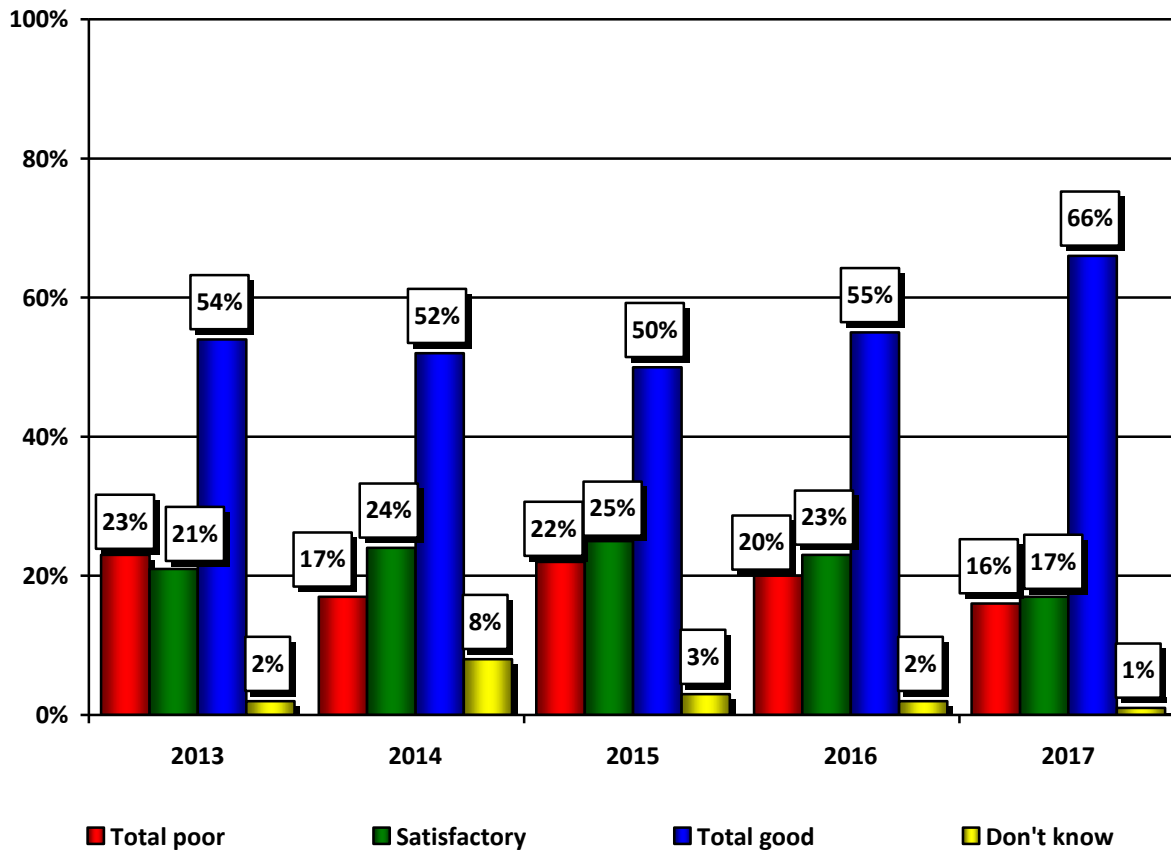


Almost eight in ten customers or 79% are interested in GSH providing them with information to help them save money by being more energy efficient, slightly higher than in 2016 (76%) but the same as 2015 (79%).

## BILLING – EASE OF UNDERSTANDING

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

*Q32. "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?"*



Almost two-thirds or 66% of customers provided a good or very good rating for the ease of understanding or reading their GSH bill, 11% higher than in 2016 and the best rating over the course of the five survey waves. There were -4% fewer that have a poor or very poor rating (16%) and -6% a neutral or satisfactory score.

## 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 (Q33)**.

While the most named issue among those with an opinion was to have lower rates at 23%, this is significantly lower (-12%) than the 35% that provided the same comment in 2016. Rather, there was a +7% increase in the percentage of customers that named maintain current rates / do not increase rates in this survey at 14% compared to the last (7%). Other mentions included explaining the cost of energy on bills (7%), providing information on what is involved in the cost of hydro (6%), make bills easier to understand (6%) and provide more info on how to conserve (5%). There were 5% that named outage issues including fewer or quicker response times (4%) and more notice about outages (1%), 3% want better communication in general, while 1% named each of having incentives to reduce consumption, better hours of operation and alternative energy options. A total of 28% did not know or had no further comment.

## DISTRIBUTION SYSTEM PLANNING

A series of four questions was asked that related to “Distribution System Planning” with the following descriptive preamble (relating to the cost of electricity) being first read to respondents.

***“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.”***

Respondents were then asked the first question, which also contained an information statement about their awareness of the percentage of their bill that stays with GSH.

***DSPQ1. Only the cost of the distribution or “local delivery”, stays with Greater Sudbury Hydro to cover the cost of distributing electricity to your home / business. For instance, in 2016, Greater Sudbury Hydro collected the whole bill from its customers but only kept 14%, while the other 86% was passed through to other agencies.***

***“Would you say the 14% that stays with Greater Sudbury Hydro to operate the local distribution system is:”***

|                              | Percent |
|------------------------------|---------|
| Much less than you expected  | 29%     |
| A bit less than you expected | 26%     |
| About what you expected      | 15%     |
| More than you expected       | 6%      |
| A lot more than you expected | 5%      |
| Don't know (not read)        | 20%     |

A 55% majority felt that the percentage of their bill (14%) that stays with GSH was either much less than what they expected at 29% or a bit less at 26%. There were 15% that said it was about what they thought, with only 11% claiming it was more (6%) or much more (5%). There were two in ten that answered do not know or were unsure or had no opinion.

Another descriptive statement about the GSH five-year DSP plan was read to respondents.

***“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.”***

Respondents were then asked to rate the level of importance to them, using a five-point scale, with three aspects of the plan. These indicators were baselined in 2016 and the results below contain the combined important (4-important & 5-very important) results.

***“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 Important 2016 | Total Important 2017 |
|---|----------------------|----------------------|
| DSP Q2. “To maintain or improve on the <b>current level of system reliability</b> , keeping outages to as few as possible and as short as possible” | 84%                  | 89%                  |
| DSP Q3. “To maintain or improve on the <b>current level of safety</b> for it’s employees and the public”  | 74%                  | 85%                  |
| DSP Q4. “To enable the <b>connection of renewable energy sources</b> such as solar panels and wind generation to the electricity system”            | 51%                  | 60%                  |

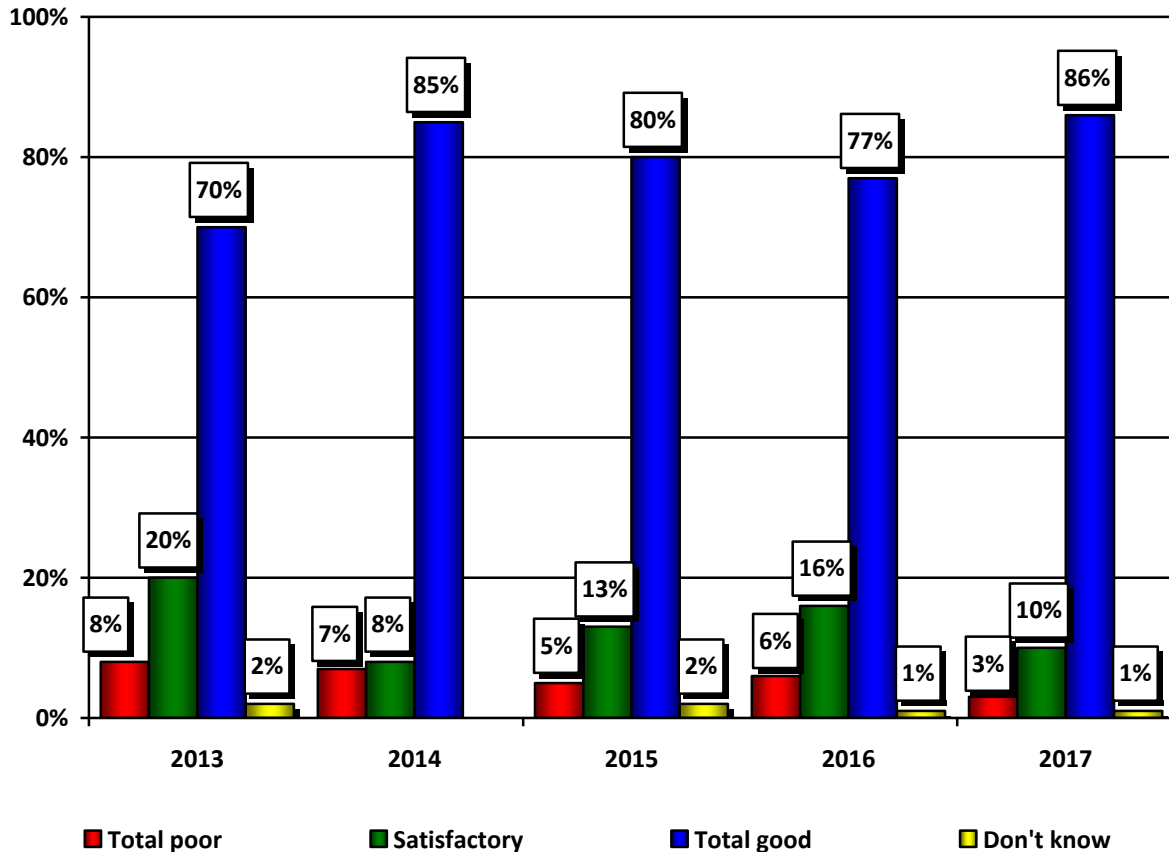
The most important aspect of the plan to a strong 89% majority of customers is to maintain or improve reliability in order to reduce outages, a 5% increase over 2016. The next highest area in terms of importance as rated by a high 85% is to maintain or improve the current level of safety for employees and the public, a significant 11% gain over 2016. The enabling of the connection of renewable energy sources rated lower at 60%, but this is still 9% higher than in 2016 (51%).

# BUSINESS EXECUTIVE SUMMARY

## 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?"*



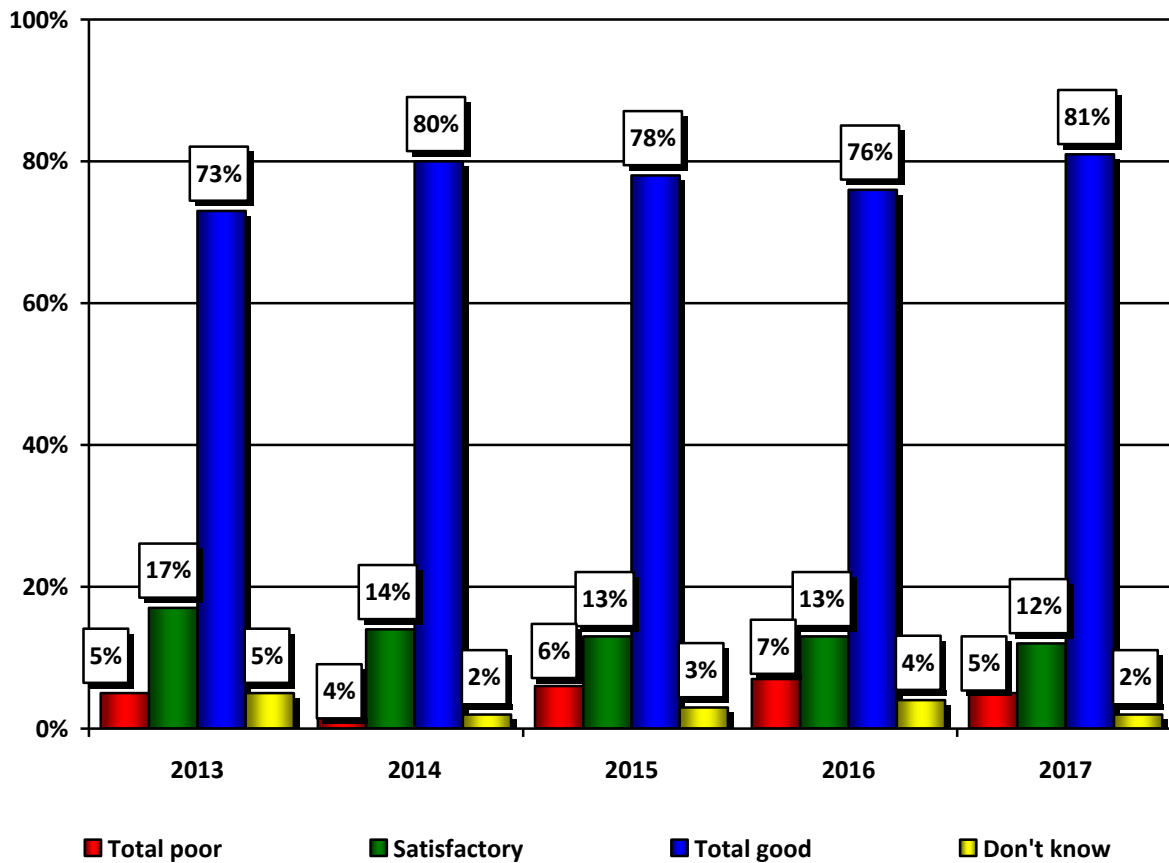
The overall satisfaction rating as represented by the combined good and very good responses increased by 9% compared to 2015 and is now at 85%. Total poor mentions dropped -3% as did those that provided a neutral or satisfactory score (-3%), while the do not know number remained at 1%.



## CUSTOMER SERVICE

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

**Q2. "How would you rate Greater Sudbury Hydro's customer service (i.e. being responsible and reliable) compared to your other business service providers?"**



A total of 81% of businesses provided a good or very good rating for GSH and its service in relation to other providers, a +5% higher result compared to 2016 (76%) and the best finding since data was first collected in 2013.

## PRICE & VALUE

Businesses were read the following short statement after which they were asked a new question about how closely they look at their statement.

*“In addition to providing you with your monthly Greater Sudbury Hydro electricity bill, Greater Sudbury Utilities also bills water and wastewater on behalf of the City of Greater Sudbury.”*

**Q3. “Do you review this combined statement to analyze its separate electricity and water costs, or only look at the total, which combines both electricity and water/wastewater charges?”**

|  |   | Percent |
|--|---|---------|
|  | Review separate parts of combined statement | 78%     |
|  | Only look at total                          | 21%     |
|  | Don't know                                  | 1%      |

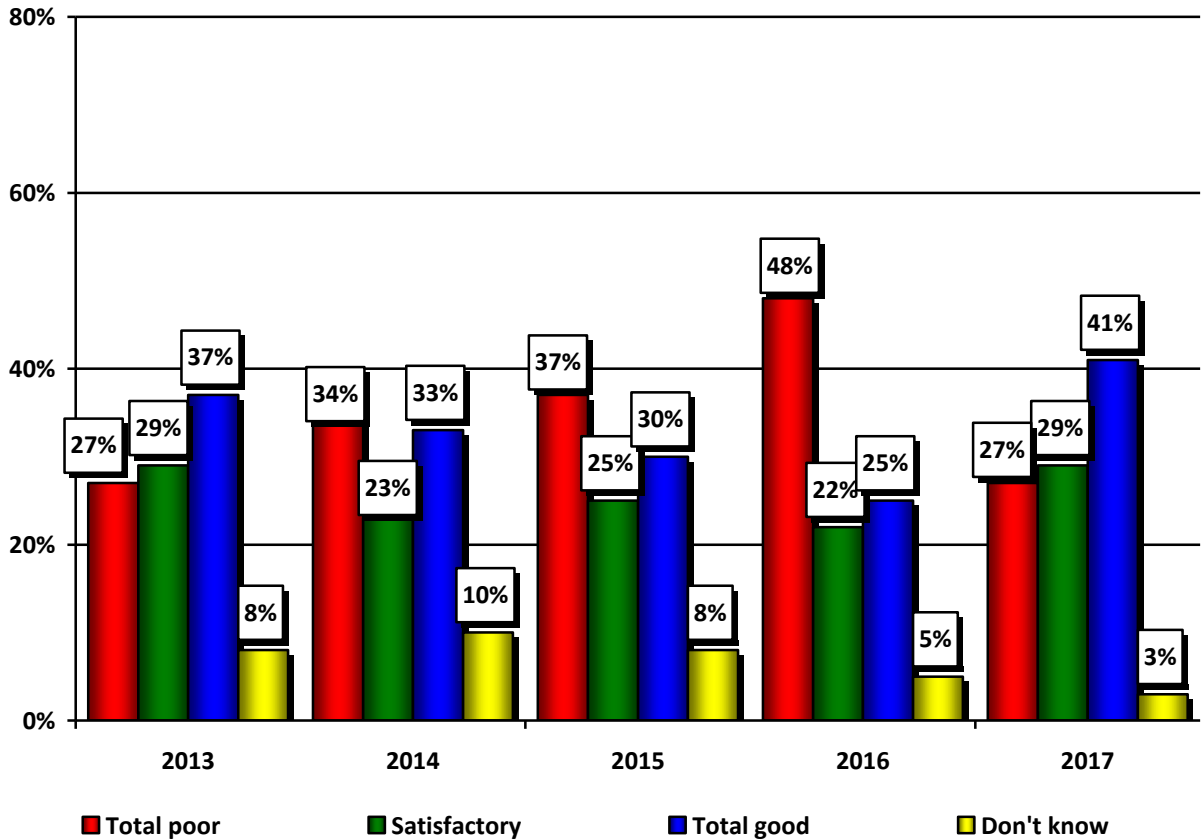
Almost eight in ten commercial respondents or 78% said that they review separate parts of their combined statements, 21% only look at the total and only 1% or N=1 answered do not know.

Prior to questions related to the cost of electricity that were asked, respondents were read the following short statement.

*“When answering the next two questions, I would like you to only consider the electricity cost you pay on your monthly utility bill.”*

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

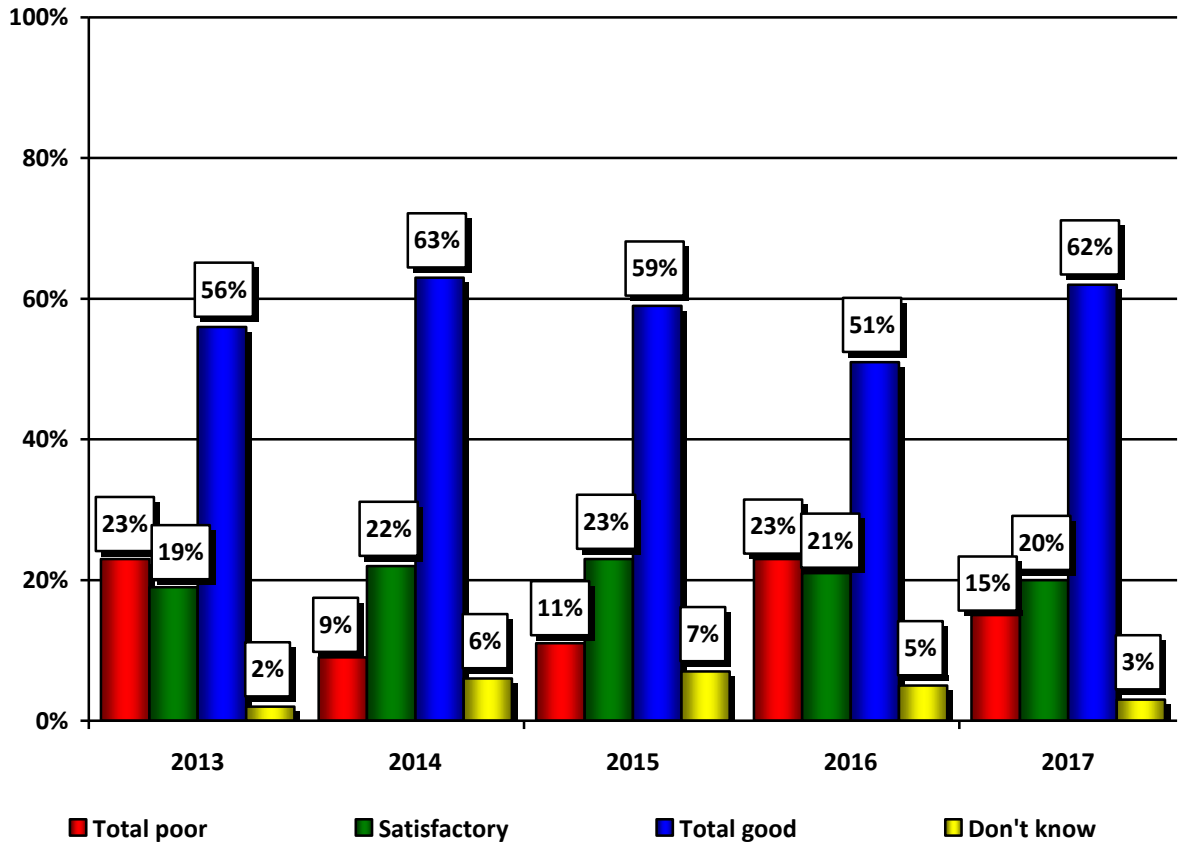
**Q4. “How would you rate your satisfaction with the price you pay for electricity compared to what you pay for other (essential) business services?”**



Satisfaction with the comparative cost of electricity in relation to other essential services witnessed a sharp +16% increase compared to the previous 2016 survey, as more than four in ten businesses or 41% provided a good or very good score in this area. There was also a significant -21% decrease in the combined poor rating to 21%, while +7% more held a neutral opinion and -2% less were unsure.

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

**Q5. "Using the same scale from one very poor to five very good, how would you rate the overall value that Greater Sudbury Hydro provides?"**



After witnessing a sharp drop in 2016, the perceived value indicators of good and very good improved in this wave by 11% to 62%, coming back into line with 2014 and 2015 results.

## 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. Results are also ranked in terms of 2017 level of agreement – from highest to lowest.

*“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 | 2017       |
|---|------|------|------|------|------------|
| Q8. Greater Sudbury Hydro meets its commitment to customers.  | 69%  | 86%  | 83%  | 79%  | <b>85%</b> |
| Q6. Greater Sudbury Hydro provides customers with reliable and good service.                                | 69%  | 89%  | 85%  | 81%  | <b>84%</b> |
| Q12. Greater Sudbury Hydro encourages efficient use of electricity among its customers.                     | 55%  | 75%  | 71%  | 80%  | <b>82%</b> |
| Q10. Greater Sudbury Hydro is concerned about public safety and safe work practices.                        | 65%  | 58%  | 56%  | 64%  | <b>74%</b> |
| Q9. GSH provides its customers with information about programs to help customers reduce their energy costs. | 65%  | 71%  | 69%  | 76%  | <b>73%</b> |
| Q11. Greater Sudbury Hydro invests in and gives back to the community                                       | 38%  | 29%  | 25%  | 31%  | <b>43%</b> |
| Q7. Greater Sudbury Hydro is committed to effectively managing a balanced budget.                           | 25%  | 21%  | 21%  | 19%  | <b>17%</b> |

The highest rated category in terms of agreement was for Greater Sudbury Hydro meeting its commitment to customers at 85% – a 6% improvement over 2016. This was closely followed by 84% that agreed that GSH provides its customers with reliable and good service (+3%) and by 82% that somewhat or strongly agreed that GSH encourages the efficient use of electricity. (+2%). The next highest rated areas were for GSH being concerned with public safety at 74%, a significant 10% increase and for providing information about programs to reduce energy costs (-3%).

Lowest scored were the areas of investing back in the community by 43% (although a +12% increase) and especially for being committed to effectively managing a balanced budget where only 17% agreed (-2%). While the negatives or total disagree responses were low for these two indicators (7% each), there were a very high number that answered do not know or were unaware (32% & 57% 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 | 2017       |
|--|------|------|------|------|------------|
| Q13. The reliability of power supply   | 91%  | 90%  | 87%  | 89%  | <b>86%</b> |
| Q14. Prompt responses to power outages when they occur                                       | 74%  | 73%  | 70%  | 72%  | <b>80%</b> |
| Q15. Effectively scheduling planned power outages  | 61%  | 59%  | 55%  | 41%  | <b>58%</b> |
| Q16. Effectively communicating with customers about planned power interruptions in your area | 62%  | 53%  | 50%  | 40%  | <b>49%</b> |

Good and very good scores remain highest for the reliability of the power supply at 86% (-3%), followed by the prompt response to outages at 80% – an +8% increase compared to 2016. There were positive (good & very good) rating increases for effectively scheduling planned outages (+17% to 58%) and communicating with customers about planned outages (+9% to 49%).

## 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.

**Q17. “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 | 2017 |
|---|------|------|------|------|------|
| 1-lowest rates – regular outages                | 3%   | 4%   | 3%   | 3%   | 1%   |
| 2-low rates – occasional outages                | 6%   | 3%   | 5%   | 4%   | 2%   |
| 3-neutral – a balance between rates and outages | 57%  | 58%  | 65%  | 69%  | 79%  |
| 4-high rates – only a few outages               | 12%  | 18%  | 14%  | 9%   | 7%   |
| 5-highest rates – no outages                    | 9%   | 3%   | 2%   | 1%   | 2%   |
| Don’t know                                      | 13%  | 14%  | 11%  | 14%  | 9%   |

Almost eight in ten or 79% of businesses and 10% more than in 2016 want a balance between rates and outages. Only 3% are willing to have lower prices at the cost of some form of outage, 9% would tolerate a higher rates for fewer or no interruptions and 9% did not know or were unsure.

## PAYMENT OPTIONS

Respondents were asked about their interest in a series of options for their electricity bill payments.

**Q18. "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 | 2017 |
|---|------|------|------|------|------|
| Online / telephone banking                  | 51%  | 42%  | 47%  | 62%  | 70%  |
| Equal monthly payment plan                  | 36%  | 41%  | 43%  | 56%  | 59%  |
| Automatic withdrawal from your bank account | 22%  | 43%  | 42%  | 37%  | 40%  |
| Online at Sudbury Hydro Website             | 20%  | 16%  | 19%  | 22%  | 20%  |
| Payment at the Greater Sudbury Hydro office | 25%  | 28%  | 19%  | 16%  | 18%  |

Seven in ten businesses or 70% have an interest in online or telephone banking up 8% over the last survey period, followed by 59% that favour an equal monthly payment plan, 3% higher than in 2016. Interest was next strongest for automatic bank withdrawals at 40% (+3%), while it was low at 20% for payment through the GSH website and lowest at 18% for payment at the GSH office.

Those respondents that provided **multiple responses of yes for methods to the payment method question (N=70) were then asked which one was their most preferred (Q19)**. Online or telephone payment was most cited by 39%, followed by equal monthly payments at 26% and automatic withdrawals at 23%. A total of 10% named payment at the GSH office and only 3% online at Sudbury Hydro Website.

In total 34% of business customers surveyed **currently receive their hydro bill electronically (Q20)** compared to 23% in 2016.

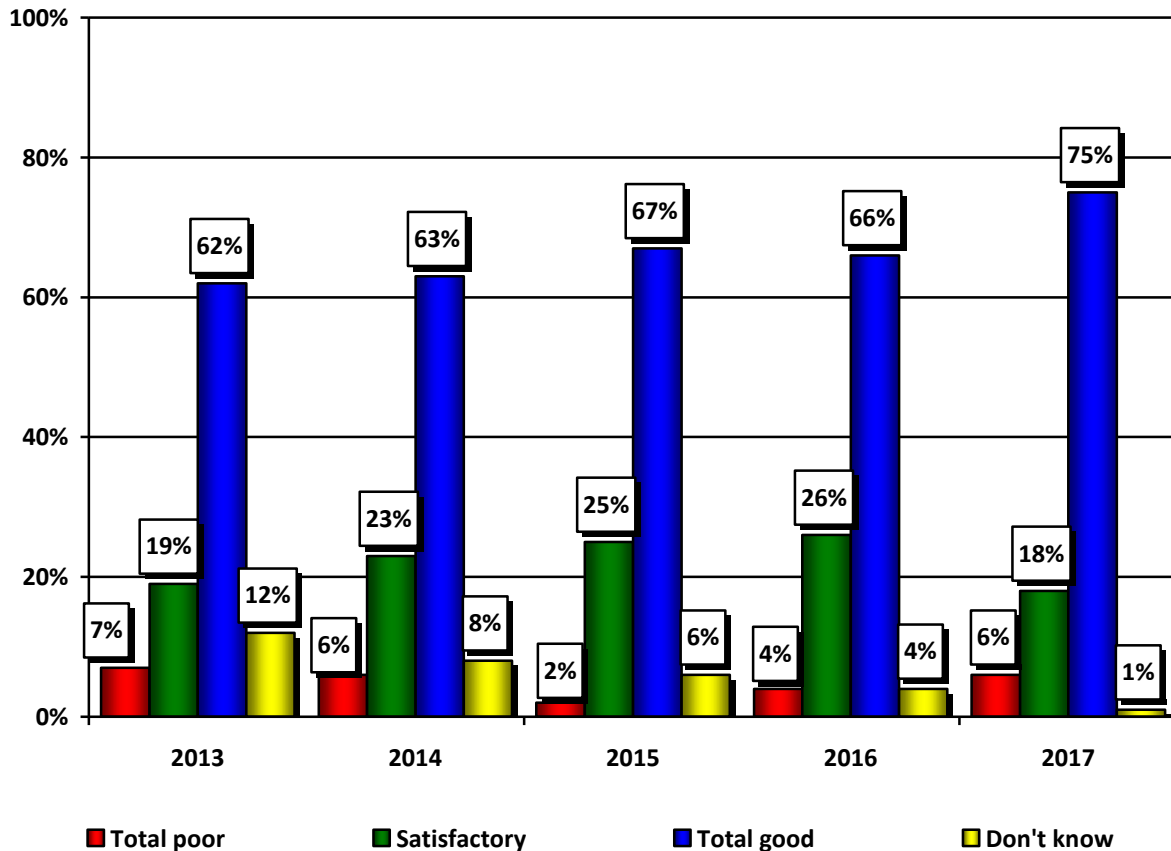
**The (N=66) that do not currently receive an electronic statement were asked if they would be interested in receiving an E-bill (Q21)**. A total of 49% claimed that they would favour getting an electronic statement (45% in 2016).



## COMMUNICATION

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

**Q22. "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?"**



Three-quarters or 75% provided a good or very good rating for how GSH communicates with its clients, a 9% increase compared to the 2016 survey and the highest score over the five touch points.

Businesses were asked in an open ended unaided question about their **preferred method to have Greater Sudbury Hydro communicate information to them (Q23)**. Email was the preferred method by over half or 53% (+15% compared to 2016), followed by bill inserts at 13% (-9%), social media at 13% (+10%), direct mail by 8% (-9%), the GSH website at 8% (-2%), telephone by 2% (-3%) and the customer newsletter by 1% (-1%). There were N=2 or 2% that did not know or had no preference.

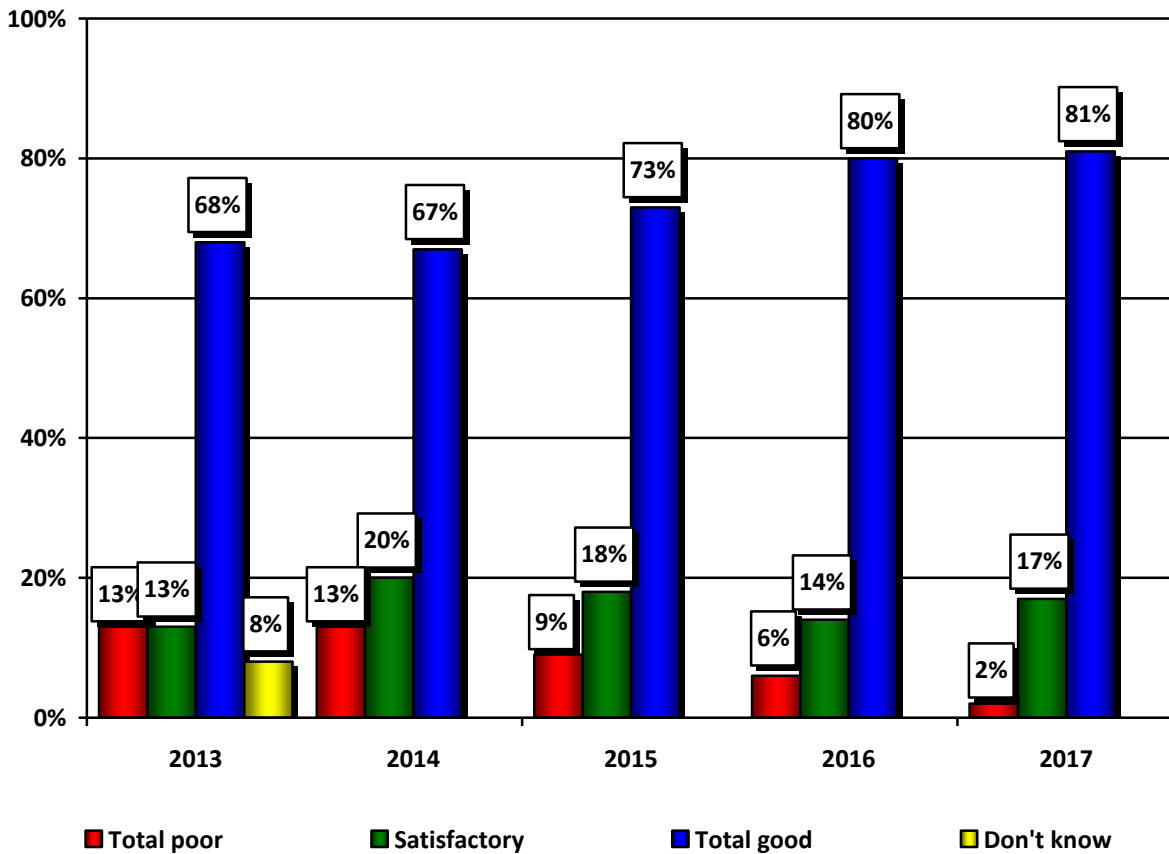
In another open or unaided question, businesses were asked about **how they would most like to communicate with GSH (Q24)**. Telephone was most named by 44% (-11% in relation to 2016) of those surveyed, followed by an email by 40% (+8%), social media by 9% (+3%) and a link or form on the GSH website by 5% (-1%), while 2% 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 (Q25)** of which 42% said that they have (36% in 2016, 22% in 2015 & 15% in 2014).

The N=42 of GSH website visitors were then asked follow-up questions related to the site and the information it provides.

**Q26. "How would you rate the quality of the information provided on the Greater Sudbury Hydro website?"**



Satisfaction (good & very good score) with the website has remained constant at 81% compared to 2016 (80%).

Website visitors (N=42) were also asked in a question allowing for multiple responses about **the information they were looking for (Q27)**. In total, 34% of all combined multiple responses related to account information, 24% energy conservation, 20% rates or fees, 10% power outages, 8% contact information, 2% corporate information and 2% grants for energy efficiency upgrades.

In a final website rating question, the N=42 (site visitors) were asked **if they found the information they were looking for (Q28)** of which 79% said that they did (75% in 2016, 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 (Q29)**.

**Q29.** *“Would you be interested in being able to manage your Greater Sudbury Hydro account online?”*

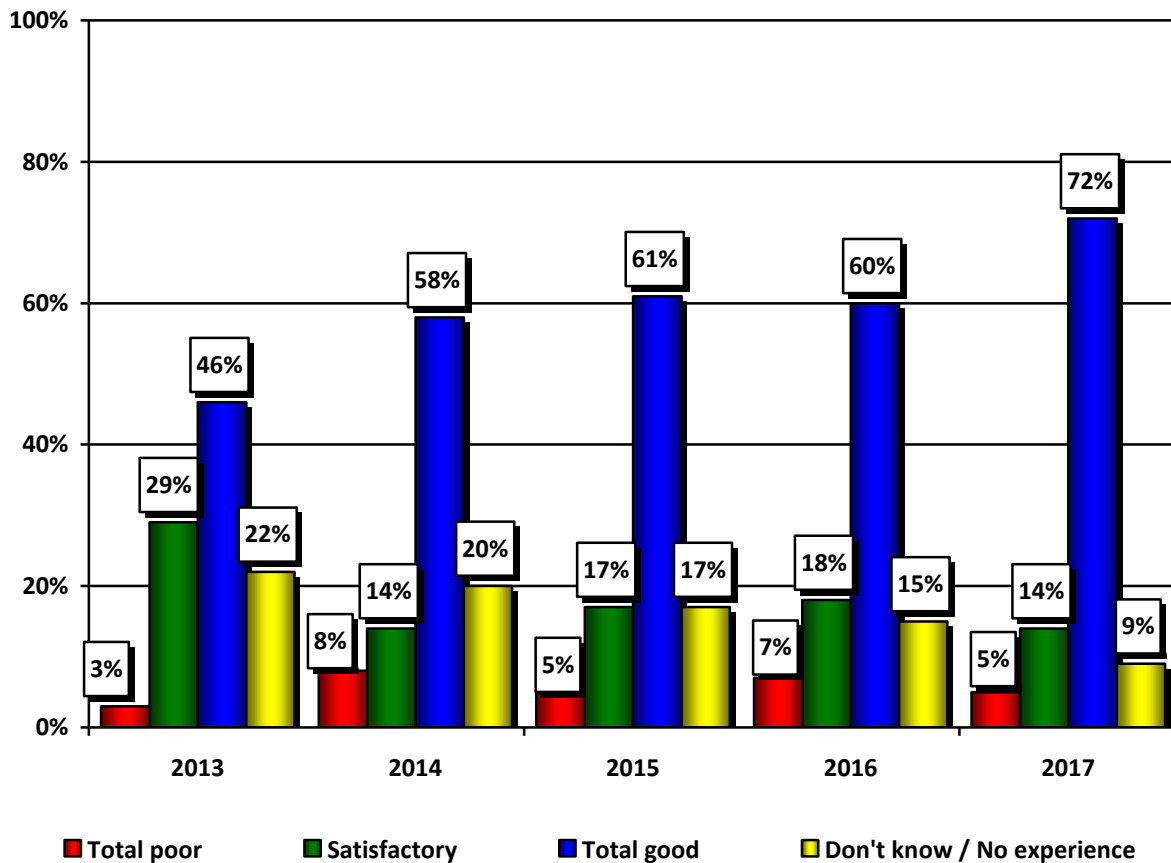
|  |     | Percent |
|--|-----|---------|
|  | Yes | 67%     |
|  | No  | 33%     |

Two-thirds or 67% claimed that they would be interested, compared to 64% in 2016, 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.

**Q30. "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?"**

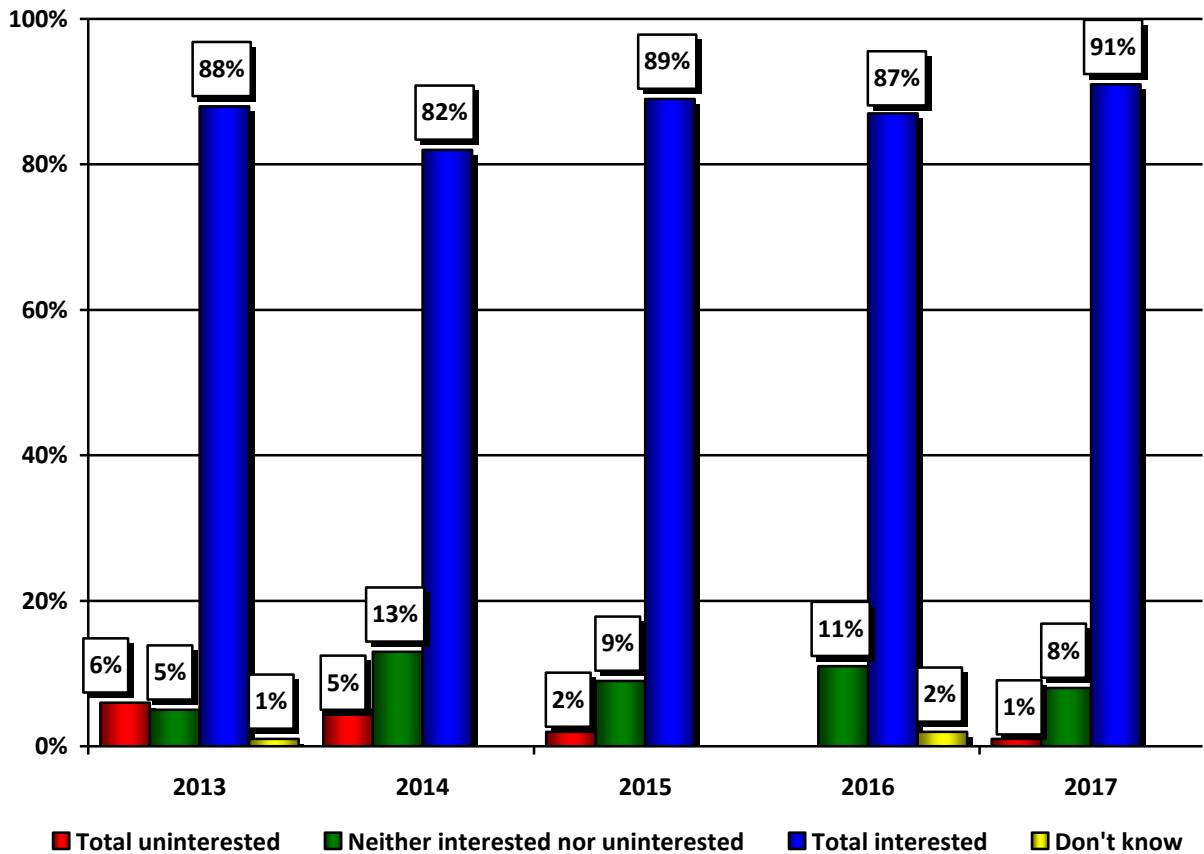


The good and very good rating provided for bill inserts or electronic bill links improved to 72% in this survey wave, a gain of 12% in relation to 2016 and the best result over the five year period.

## ENERGY EFFICIENCY

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

*Q31. "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?"*

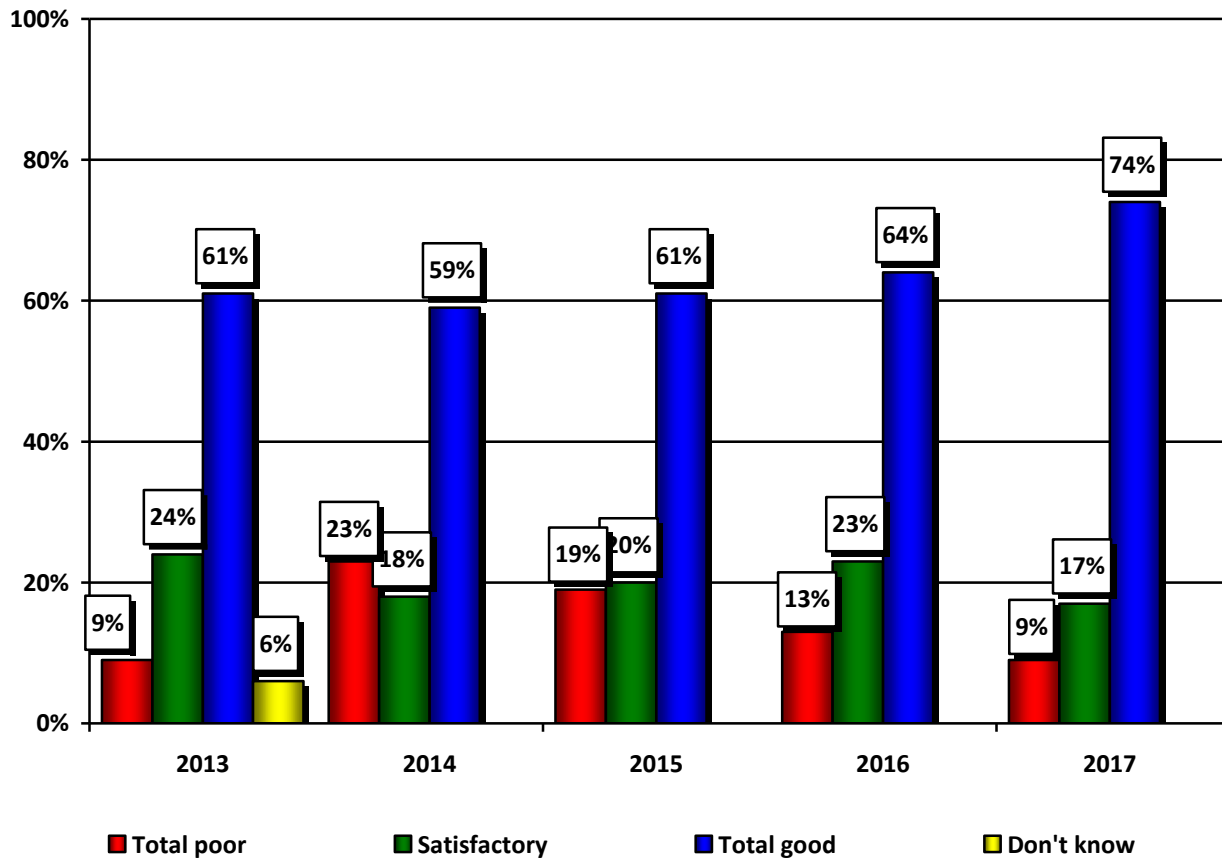


Consumer interest in obtaining energy efficiency information is very strong at 91% and the highest over the five survey waves.

## 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.

**Q32. "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 74% of customers provided a good or very good score for the ease of understanding or reading their utility bill, 10% more than in 2016 (61%). Only 9% gave a poor or very poor response (-4%) and 17% (-6%) 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 (Q33)**.

While in 2016 the issue of lower rates was named by 36%, in this survey period the number dropped to 18%. Rather, the most named mention related to maintaining rates or having no increases by 31%, compared to 12% that stated the same in 2016. Other notable comments related to billing and wanting to understand how pricing works, such as what is involved in the price of hydro (11%), having bills easier to understand (7%) and having the cost of energy explained (7%). There were 4% that named fewer outages or surges, 2% quicker response times, while 1% cited each of better hours of operation, better communication and improved notification of planned outages.



## DISTRIBUTION SYSTEM PLANNING

A series of four questions was asked that related to “Distribution System Planning”, with the following descriptive preamble (relating to the cost of electricity) being first read to respondents.

***“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.”***

They were then asked the first question which also contained an information statement about their awareness of the percentage of their bill that stays with GSH.

***DSPQ1. Only the cost of the distribution or “local delivery”, stays with Greater Sudbury Hydro to cover the cost of distributing electricity to your home / business. For instance, in 2016, Greater Sudbury Hydro collected the whole bill from its customers but only kept 14%, while the other 86% was passed through to other agencies.***

***“Would you say the 14% that stays with Greater Sudbury Hydro to operate the local distribution system is:”***

|                              | Percent |
|------------------------------|---------|
| Much less than you expected  | 31%     |
| A bit less than you expected | 35%     |
| About what you expected      | 8%      |
| More than you expected       | 7%      |
| A lot more than you expected | 6%      |
| Don't know (not read)        | 13%     |

A 66% majority of businesses feel that the percentage of their bill that stays with GSH is either much less than what they expected at 31% or a bit less at 35%. There were 8% that said it was about what they thought, with only 13% claiming it was more (7%) or much more (6%). 13% did not know or were unsure.

Another descriptive statement about the GSH five-year DSP plan was read to businesses.

***“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.”***

Respondents were then asked to rate the level of importance to them, using a five-point scale, with three aspects of the plan. These indicators were baselined in 2016 and the results below contain the combined important (4-important & 5-very important) results.

***“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 Important 2016 | Total Important 2017 |
|---|----------------------|----------------------|
| DSP Q2. “To maintain or improve on the <u>current level of system reliability</u> , keeping outages to as few as possible and as short as possible” | 93%                  | 95%                  |
| DSP Q3. “To maintain or improve on the <u>current level of safety</u> for it’s employees and the public”  | 85%                  | 91%                  |
| DSP Q4. “To enable the <u>connection of renewable energy sources</u> such as solar panels and wind generation to the electricity system”            | 44%                  | 42%                  |

The most important aspect of the plan to most or 95% is to maintain or improve reliability to reduce outages, a 2% increase over 2016. The next highest area in terms of importance as rated by a very high 91% is to maintain or improve the current level of safety for employees and the public, a 6% gain over 2016. The enabling of the connection of renewable energy sources rated lower at 42%, or 2% lower than in 2016.