

Annual Customer Survey Report – 2018

Prepared by:



For:



November 2018

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METHODOLOGY & LOGISTICS

Overview

This report represents the findings from a December 2018 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 and then tracked in each subsequent December up to this current 2018 period. In each of these six (6) survey waves there was an N=400 residential customer sample segment and a N=100 business component.

Within this report, there are the findings from the December 2018 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. Separate Excel reports contain the result by question 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 20th to November 27th, 2018.

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

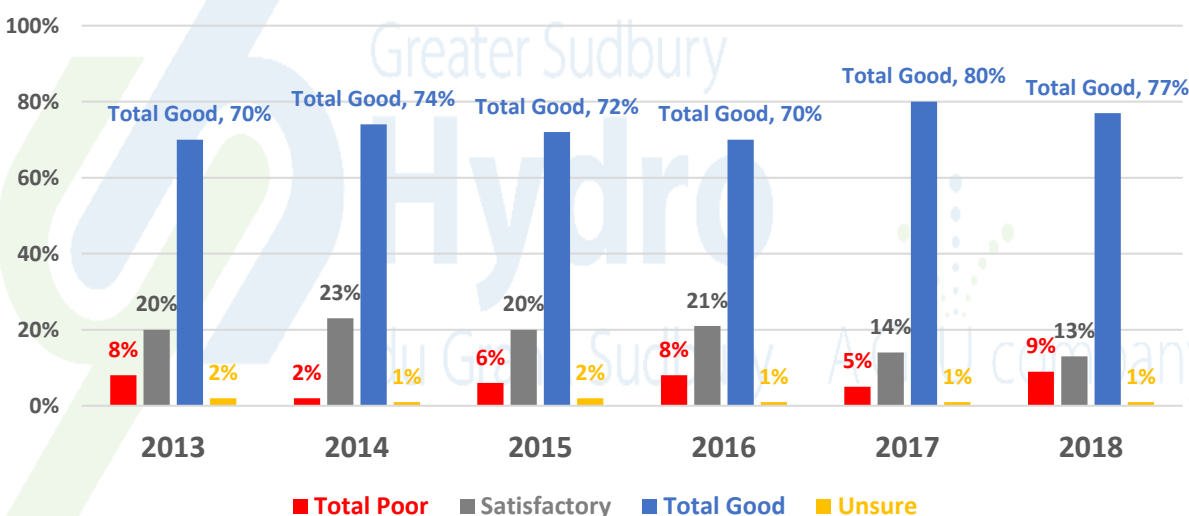
The margin of error for the N=400-person residential survey is $\pm 4.9\%$, 19/20 times and $\pm 9.8\%$, 19/20 times for the sample of N=100 businesses.

EXECUTIVE SUMMARY – RESIDENTIAL

Satisfaction

Business customers were first asked an overall satisfaction question. The following graph compares the December 2018 results with the previous five surveys. Results below combine the total poor (very poor & poor) and total good (good & very good) findings.

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?"



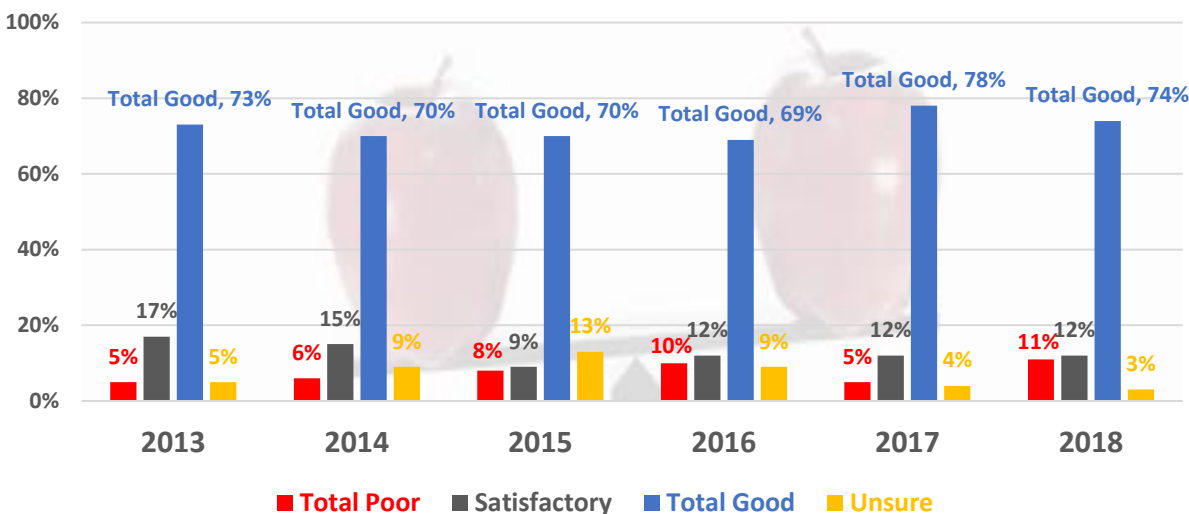
Results are similar but slightly lower (-3%) compared to 2017, with 77% of customers surveyed saying they were satisfied with GSH as their electrical service provider. This included 34% giving a response of good and 43% very good, compared to the total poor (dissatisfied) response of 9% (up +4% over 2017), while 13% (-1%) had a satisfactory opinion.

More females (80%) in relation to males (73%) provided a good or very good response as did older customers 55-64 at 84% and 65+ at 80% (18 to 34 – 75%, 35 to 44 – 70% & 45 to 54 – 72%). Mid-earners in the \$75,000-\$99,999 range gave the lowest good score (70%) and respondents in the under \$50,000 cohort the highest (83%).

Customer Service

Next residential customers were asked the following comparative service question, rating GSH's service against other providers. Results below combine the total poor (very poor & poor) and total good (good & very good) findings.

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 (36%) and very good (38%) is 74%, a marginal drop of -4% compared to 2017, but +5% higher than the low recorded in 2016. While the percentage of satisfactory responses has remained constant over three survey touch-points, there was a +6% increase in the poor score to 11% – this while the unsure mentions fell by -1% to 3%.

The lowest earners in the under \$50,000 cohort accorded the lowest good and very good rating at 67% along with the highest combined poor score at 26% – while those making \$100,000+ gave the best positive rating at 82%. Females (79%) were also inclined to provide a good rating in relation to males (68%) as were older customers 65+ (85%) and 55 to 64 (77%), compared to 18 to 34 (65%) and 35 to 54-year old's (68%).

Price & Value

In a question first asked in the 2017 survey, respondents were probed 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?”		2017	2018
	Review separate parts of combined statement	64%	66%
	Only look at total	26%	27%
	Don't know	10%	7%

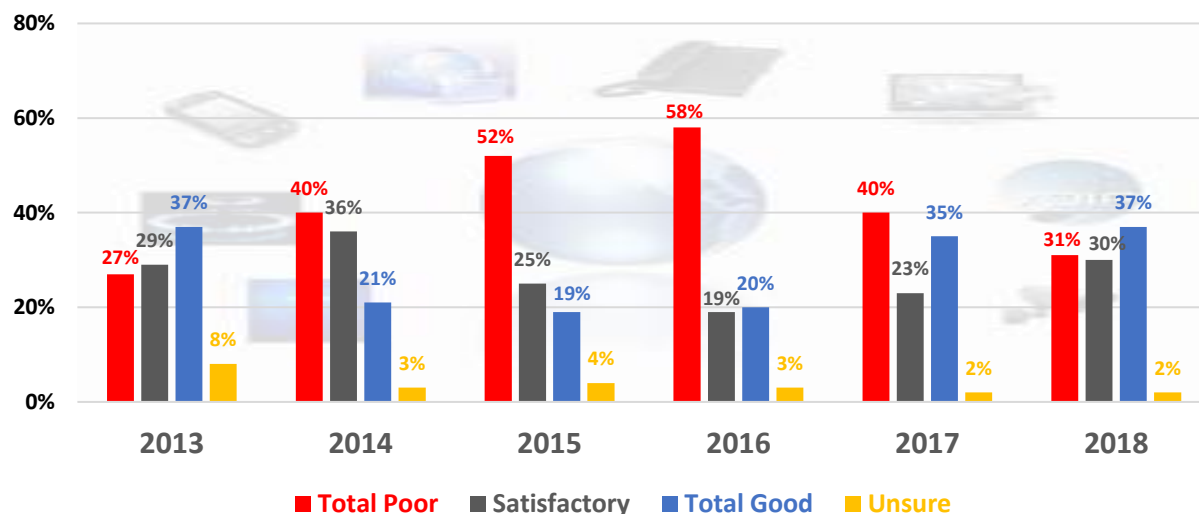
Results were similar over the two surveys with 66% claiming they review or analyze their bill statements for separate water and electricity costs (64% in 2017), while 27% (26% in 2017) said they look only at the total and 7% (10% in 2017) answered that they did not know. Those earning the least or under \$50,000 (77%) a year are most likely to review their bill in detail, as are customers 55 to 64 (71%) and 65+ (78%).

The following short statement was read to respondents and then they were asked questions related to the cost they pay for electricity.

“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. Results below combine the total poor (very poor & poor) and total good (good & very good) findings.

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)?”

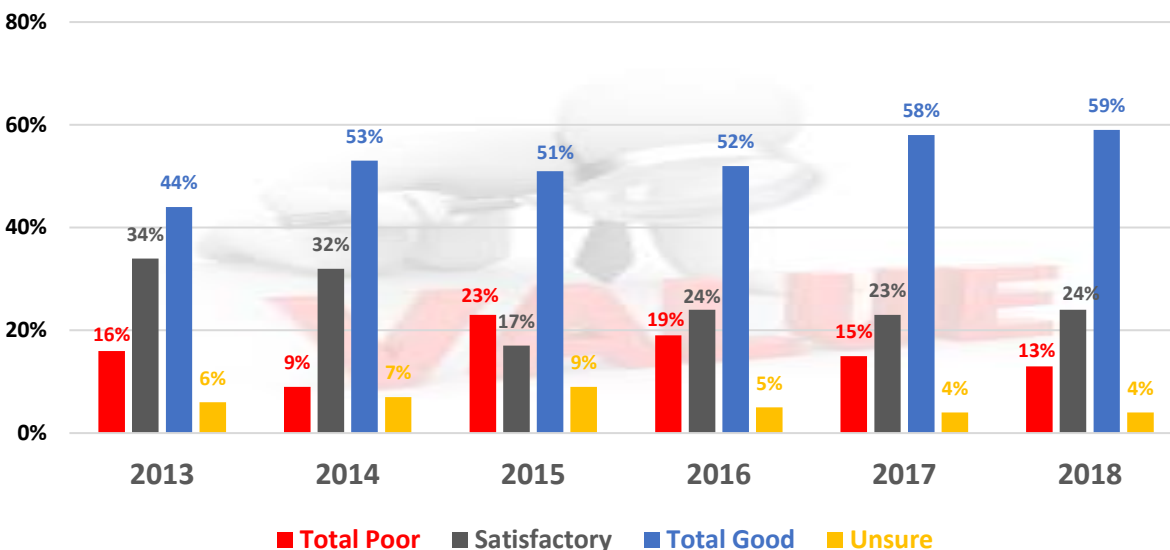


There has been a continuing decrease in the percentage of customers that are dissatisfied with the cost of electricity in relation to other services as -9% fewer in 2018 or 31% provided a poor or very poor score compare to 40% in 2017 – and 27% less than in 2016 (58%). Thirty-seven percent gave a good or very good score, up +2% over 2017 and the highest rating since 2013. The number of satisfactory responses also increased +7% to 30% over the previous survey and 2% remained undecided.

Poor results were highest among younger 18 to 34 (42%) and 35 to 44 (38%) year old’s as well as among lower earners in the under \$50,000 (46%) and \$50,000 to \$99,999 (43%) cohorts. Bigger earners making \$75,000 to \$99,999 (50%) and \$100,000+ (64%) provided the strongest good or very good scores.

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 improved slightly by +1% to almost six in ten or 59%. The total poor score is now at 13% (-2%), while a similar 24% (23% in 2017) accorded a satisfactory score and 4% (unchanged) were unsure. Most satisfied (total good) were those aged 55 to 64 (68%) and 65+ (70%), as well as respondents in the \$75,000 to \$99,999 (75%) and \$100,000+ cohorts (76%).

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 4-agree and 5-strongly agree and compares the results over time. Results are also ranked in terms of 2018 top two (4 & 5) agreement ratings 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."

GSH IMAGE STATEMENTS – TOTAL AGREE RESPONSES	2013	2014	2015	2016	2017	2018
Q6. Greater Sudbury Hydro provides customers with reliable and good service.	77%	75%	73%	72%	79%	82%
Q12. Greater Sudbury Hydro encourages efficient use of electricity among its customers.	62%	72%	74%	71%	75%	80%
Q8. Greater Sudbury Hydro meets its commitment to customers.	80%	76%	75%	73%	78%	79%
Q9. GSH provides its customers with information about programs to help reduce their energy costs.	58%	71%	61%	59%	65%	72%
Q10. Greater Sudbury Hydro is concerned about public safety and safe work practices.	48%	63%	54%	60%	62%	63%
Q7. Greater Sudbury Hydro is committed to effectively managing a balanced budget.	25%	33%	32%	29%	30%	40%
Q11. Greater Sudbury Hydro invests in and gives back to the community.	22%	28%	26%	30%	28%	29%

Respondents rated Greater Sudbury Hydro highest in terms of agreement for providing customers with reliable and good service at 82%, +3% higher compared to 2017 (79%). This was closely followed by the indicator related to encouraging the efficient use of electricity at 80%, also up +5% and for meeting its commitment to customers at 79% (+1%). The next strongest rated agreement area was for GSH providing customers with information about programs to reduce energy costs at 72%, which improved in this survey wave over the previous period by +7% and for being concerned about public safety and safe work practices at 63%, which saw a small gain of +1%.

The lowest agreement ratings continue to be the commitment to running a balanced budget at 40%, although this area saw a +10% improvement over 2017 and investing back in the community at 29% (+1%). With respect to the three lowest rated areas (public safety, balanced budget & investing back), a significant number of respondents were unaware of these activities and provided answers of do not know, resulting in lower positive overall scores (24% – safety, 32% – balanced budget & 43% investing back in community).

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 AREAS – TOTAL GOOD RESPONSES	2013	2014	2015	2016	2017	2018
Q13. The reliability of power supply	83%	92%	90%	88%	89%	82%
Q14. Prompt responses to power outages when they occur	72%	82%	81%	84%	86%	80%
Q15. Effectively scheduling planned power outages	57%	54%	66%	64%	70%	68%
Q16. Effectively communicating with customers about planned power interruptions in your area	55%	56%	68%	66%	63%	61%


The highest rated performance indicator remains the one related to the reliability of the power supply at 82%, although this number dropped over 2017 by -7%. Next best scored was the area of promptly responding to outages at 80% – which also fell in relation to 2017 by -6%.

In total, 68% accorded a good or very good score for effectively scheduling planned power outages, similar, but -2% lower than in 2017. Lowest rated again was effectively communicating about planned power interruptions at 61%, a slight -2% decline over the previous year.

Rates Versus Outages

A question was asked related to the cost customers are willing to pay for electricity system maintenance 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 OUTAGES TRADE OFF	2013	2014	2015	2016	2017	2018
	1-lowest rates – regular outages	2%	4%	4%	3%	2%	1%
	2-low rates – occasional outages	15%	3%	8%	7%	5%	6%
	3-neutral – a balance between rates and outages	44%	55%	47%	54%	59%	61%
	4-high rates – only a few outages	15%	13%	11%	12%	11%	13%
	5-highest rates – no outages	3%	5%	6%	5%	8%	7%
	Don't know	22%	21%	24%	19%	15%	12%

Customers continue to most want a balance between rates and outages at 61% (+2% over 2017). Only 7% want lower rates even if it means outages (6% low rates and occasional outages & 1% the lowest rates and regular outages) and a core 20% do not mind paying more if the chance of a power disruption is curtailed (13% high rates and a few interruptions & 7% the highest rates and no outages).

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?"

	PAYMENT OPTION INTEREST	2013	2014	2015	2016	2017	2018
	Online / telephone banking	65%	48%	54%	58%	65%	66%
	Automatic withdrawal from your bank account	43%	52%	49%	51%	53%	55%
	Equal monthly payment plan	40%	48%	46%	54%	56%	51%
	Online at the Sudbury Hydro Website	20%	15%	19%	25%	26%	27%
	Payment at the Greater Sudbury Hydro office	23%	10%	13%	12%	10%	11%

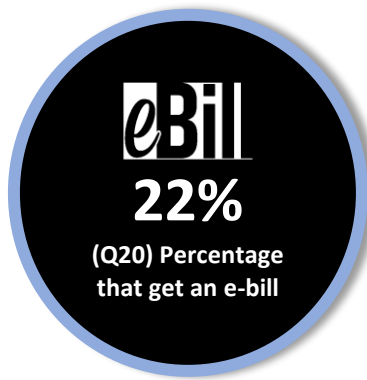
The payment method of most interest continues to be online or telephone banking by 66% (+1% over 2017) with interest in this option strongest among those 18 to 34 years old (89%), followed by those 35 to 44 (84%) and 45 to 54 (68%). Next most named was automatic bank withdrawals by 55% (-2%) and equal monthly payments by 51%, down -5% (equal payments most appeal to \$100,000+ earners – 63% & 45 to 54-year old's – 69%). Lesser named were payments through the GSH website at 27%, up +1% (higher among 18 to 34-year old's – 53% & \$100,000+ earners – 47%) and only 11% (+1%) identified the office as a preferred method.

Customers that expressed interest in multiple payment options in Q18 (N=274), 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?"

Preferred method of payment – Those with multiple responses in Q18 (N=274)	Automatic withdrawal from your bank account	39%
	Online/telephone banking through your financial institution	30%
	Equal monthly payment plan	18%
	Online at Sudbury Hydro Website	10%
	Payment at the Greater Sudbury Hydro office	3%

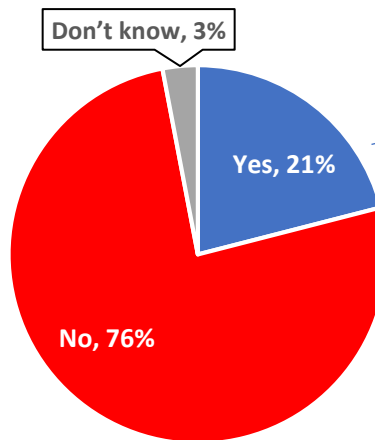
The most preferred options of payment were automatic withdrawal (39%) and online or telephone banking (30%), followed by equal monthly billing (18%). Lesser named was online through the GSH website by 10%, while only 3% said payment at the office.



E-bill usage is favoured among younger customers 18 to 34 – 43% & 35 to 44 – 30%, compared to those older 45 to 54 – 22%, 55 to 64 – 15% & 65 or over – 5%

The 78% (N=311) that do not currently receive an electronic statement were asked if they would be interested in receiving an E-bill.

Q21. "Would you be interested in receiving your bill electronically?"



A total of 21% claimed they would favour getting an electronic statement, with 18 to 34-year old's (38%) and 35 to 44-year old's (33%) being most interested, as well as the highest earners \$100,000+ (34%).

The 21% (N=65) that are interested in an e-bill (Q21) were asked what would further encourage them.

Q22a. "What would encourage you to switch to electronic or e-billing?"

It would use less paper	N=16	25%
Easier / more convenient	N=12	18%
Having more information (details)	N=10	15%
Offer option / let us know about it	N=9	14%
Don't know	N=6	9%
Receive bill quicker / on time	N=5	8%
Easier to access (current / past bills)	N=4	6%
Canada Post strike	N=3	5%

The 76% (N=237) not interested (Q21) and 3% (N=9) that are unsure were asked the following.

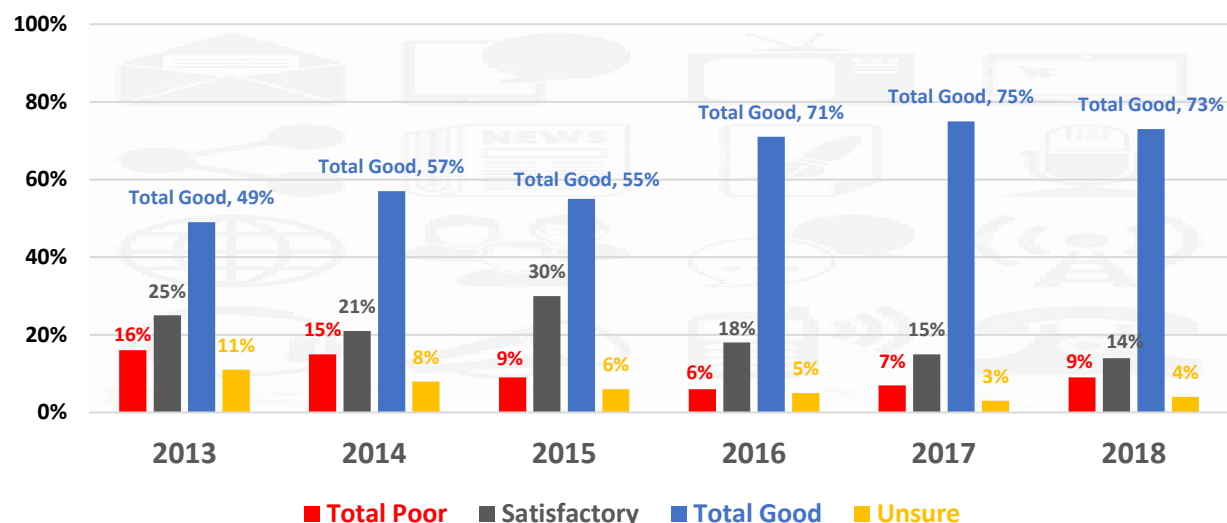
Q22b. "What reasons are preventing you from considering a switch to electronic or e-billing?"

Don't know	N=56	23%
Like having paper copy	N=52	21%
Prefer receiving them in mail	N=31	13%
Don't use / have computer, internet	N=25	10%
Habit / don't like change	N=19	8%
Easier to access / more convenient	N=18	7%
Get too many emails	N=14	6%
Can't remember all my passwords	N=11	4%
Never thought of / knew of option	N=11	4%
Poor past-experience with e-billing	N=9	4%

Communication

Respondents were asked a series of indicators about communications, starting with a rating question about how GSH communicates with its customers.










Q23. "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 cus"



The positive (good & very good) rating for communicating with customers is consistent over 2017 at 73%, but down slightly (-2%), while the negative (poor & very poor) score is up +2% to 9% and 14% accorded a satisfactory mark (-1%). There were 4% unsure compared to 3% in 2017. The youngest customers 18 to 34 provided the lowest positive rating at 67%, while the highest scores were given by 35 to 44 (81%) and 45 to 54-year old's (77%).

Respondents were asked in an open-ended unaided question about their preferred method to have Greater Sudbury Hydro communicate information to them.

Q24. "What is your preferred method to have Greater Sudbury Hydro communicate information to you?"







	E-mail from the company	N=100	25%
	Bill inserts	N=86	22%
	Direct mail	N=79	20%
	Social media	N=70	18%
	Greater Sudbury Hydro Website	N=36	9%
	Don't know/no preference	N=13	3%
	Radio	N=6	1%
	Newspapers	N=5	1%
	Telephone	N=5	1%

More than half or 52% of customers recalled some form of electronic or digital communications as a preference. This included an email by 25% (+2% over 2017), social media (unchanged) and the GSH website by 9% (+1%). Bill inserts (+2%) were named by 22% (N=7 or 2% said e-bill notices) and 20% direct mail (-1%), while 3% had no preference or didn't know and 1% stated each of radio, newspapers and a phone call.

Older customers favor bill inserts (55 to 64 – 35% & 65 or older – 36%) and direct mail (55 to 64 – 35% & 65 or older – 34%), while the youngest 18 to 34 tended to name emails (43%) and social media (39%). Those 35 to 44 most like emails (38%) and social media (25%) and 45 to 54-year old's emails (33%), social media (22%) and bill inserts (21%).

In another open or unaided question, residential customers were asked about how they would most like to communicate with Greater Sudbury Hydro.

Q25. "And as a customer, what is your preferred method that you would like to communicate with Greater Sudbury Hydro?"

	Telephone	N=232	58%
	Email	N=90	23%
	Social media	N=40	10%
	In person at office	N=19	5%
	Link or form on GSH website	N=14	3%
	Don't know/no preference	N=5	1%

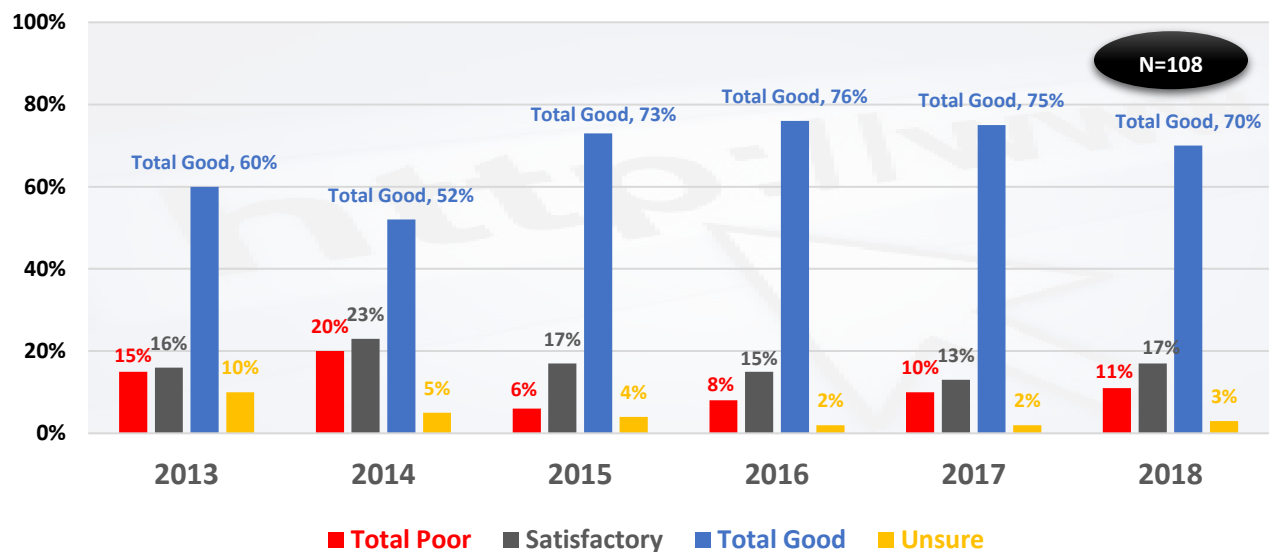
When wanting to initiate communication with GSH, telephone is the preferred approach by 58% (+7%). Next most named was an email by 23% (-2%), followed by social media by 10% (-2%), an in-person visit by 5% (-3%) and a website link by 3% (N/C).

Website

A total of 27% (34% in 2017) of customers answered in Q26 that they have visited the GSH website over the past 12 months . Younger respondents under age 55 were most likely to have visited (18 to 34 – 47%, 35 to 44 – 45%, 45-to 54 – 34%, 55-to 64 – 11%, & 65 and over – 6%).










The 27% (N=108) that visited the site were then asked three follow up questions on the information that the website contains.

Q27. "How would you rate the quality of the information provided on the Greater Sudbury Hydro website?"



Seven in ten rated the website quality of information as being good or very good, a -5% drop compared to 2017, while the negative score remained similar at 11% (-1%), but the satisfactory rating increased +4% to 17%.

The N=108 website visitors were then asked about the information they were looking for. Multiple responses were accepted and are illustrated below.

Q28. "What information did you look for?"			
	Account information	N=52	41%
	Energy conservation	N=26	21%
	Rates & Fees	N=22	17%
	News or Developments	N=10	8%
	Outage information	N=6	5%
	Contact information	N=4	3%
	Corporate info	N=2	2%
	Environment/Safety	N=2	2%
	Report an issue	N=2	2%

Seeking account information was most mentioned by 41% (+6% over 2017), followed by energy conservation by 21% (-5%) and looking for rates or fees by 17% (N/C).

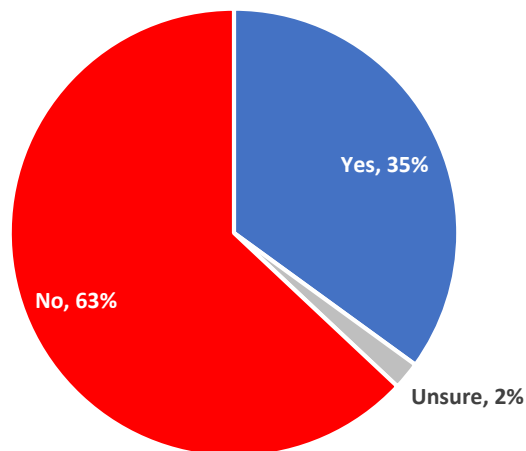
The N=108 website visitors were then asked a final question about the site.



Online Account Management

All N=400 respondents were next asked about managing their account online.

Q30. "Would you be interested in being able to manage your Greater Sudbury Hydro account online?"

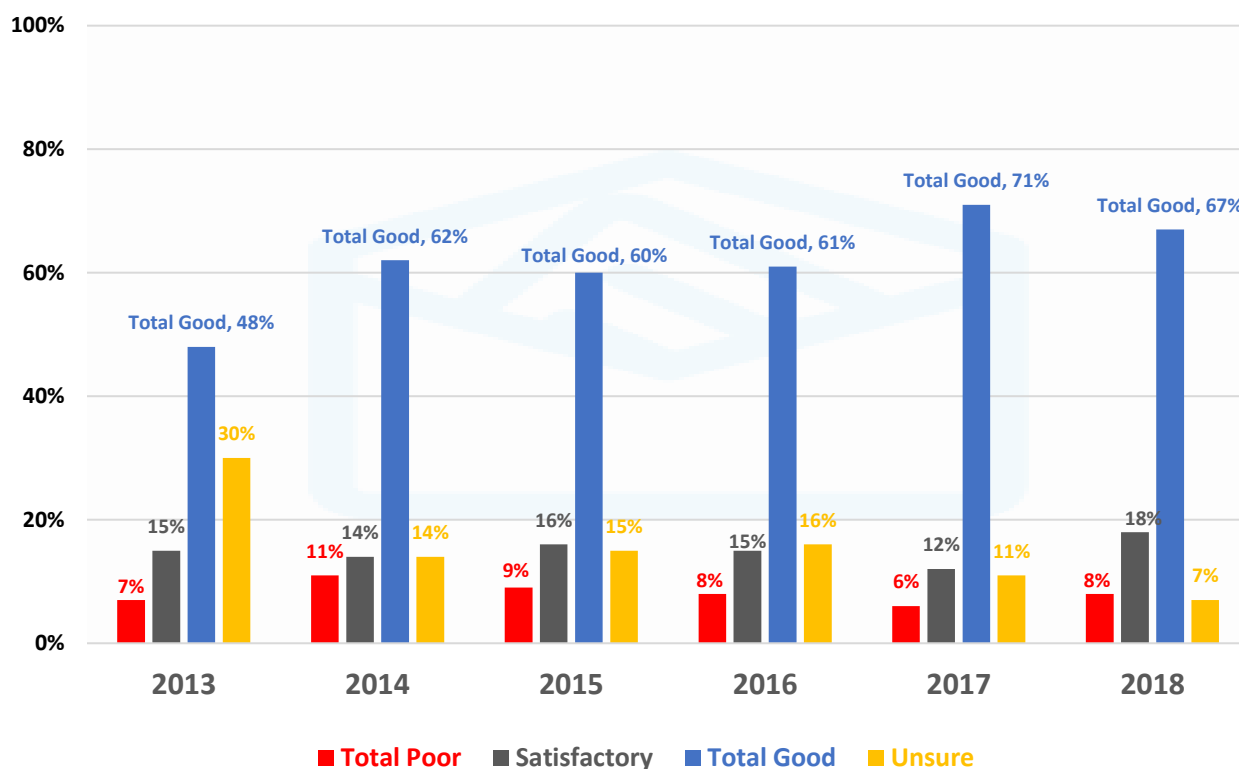


More than a third or 35% said they would be interested in managing their GSH account online (38% in 2017). Those most interested were aged 18 to 34 (68%) and 35 to 44 (54%), followed by 45 to 54 (36%). This compares to only 18% of customers 55 to 64 (18%) and 9% of seniors 65+.

Rating Bill Inserts & Links

All N=400 respondents then rated the bill insert or electronic link information provided by Greater Sudbury Hydro.

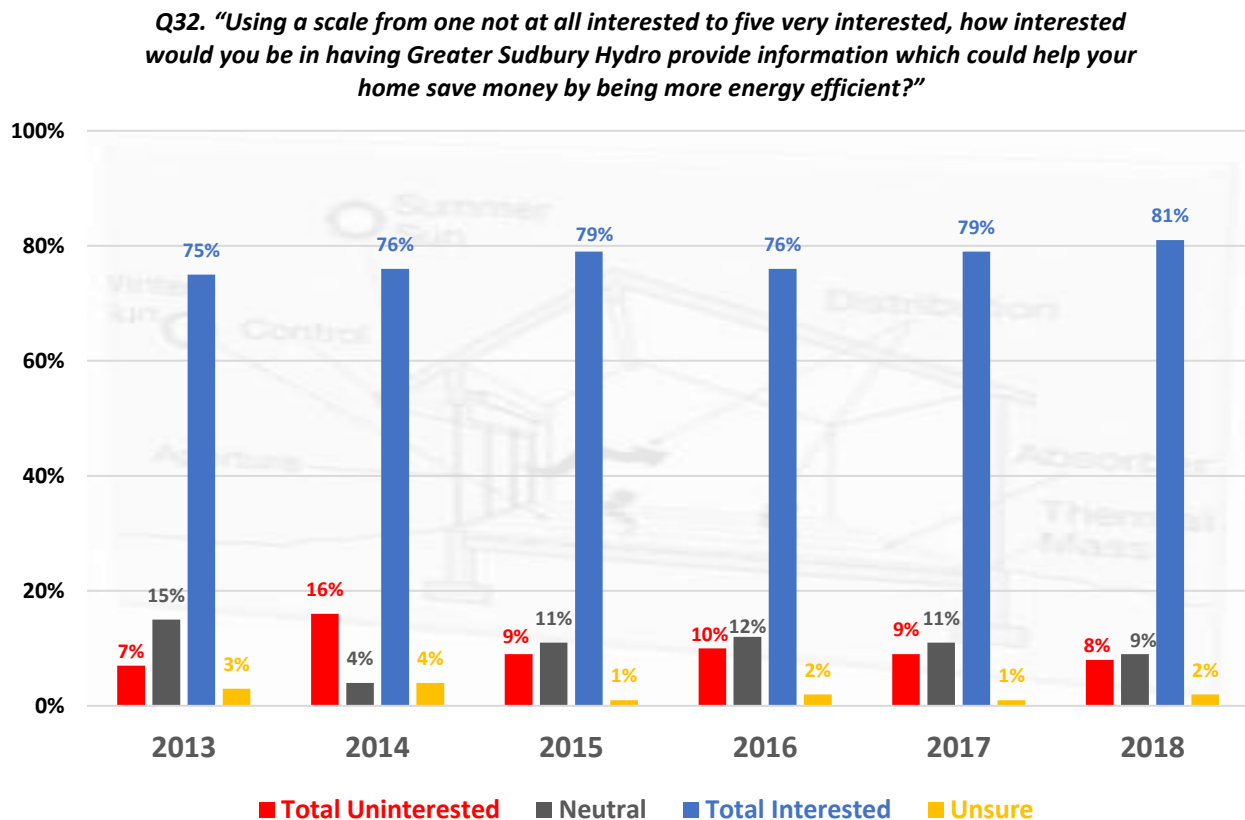
Q31. "From time to time, Sudbury Hydro attaches information to your bill in the form of a bill insert, or for electronic bills in the form of a link. Using a scale from one very poor to five very good, how would you rate the overall quality of each of the



Two-thirds provided a good or very good rating for the overall quality of the material, down -4% over 2017, but still better than the five-year (positive) average of 62%. There was a slight increase in the negative score (+2%) to 8%, while +6% more gave a satisfactory rating.

Energy Efficiency

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

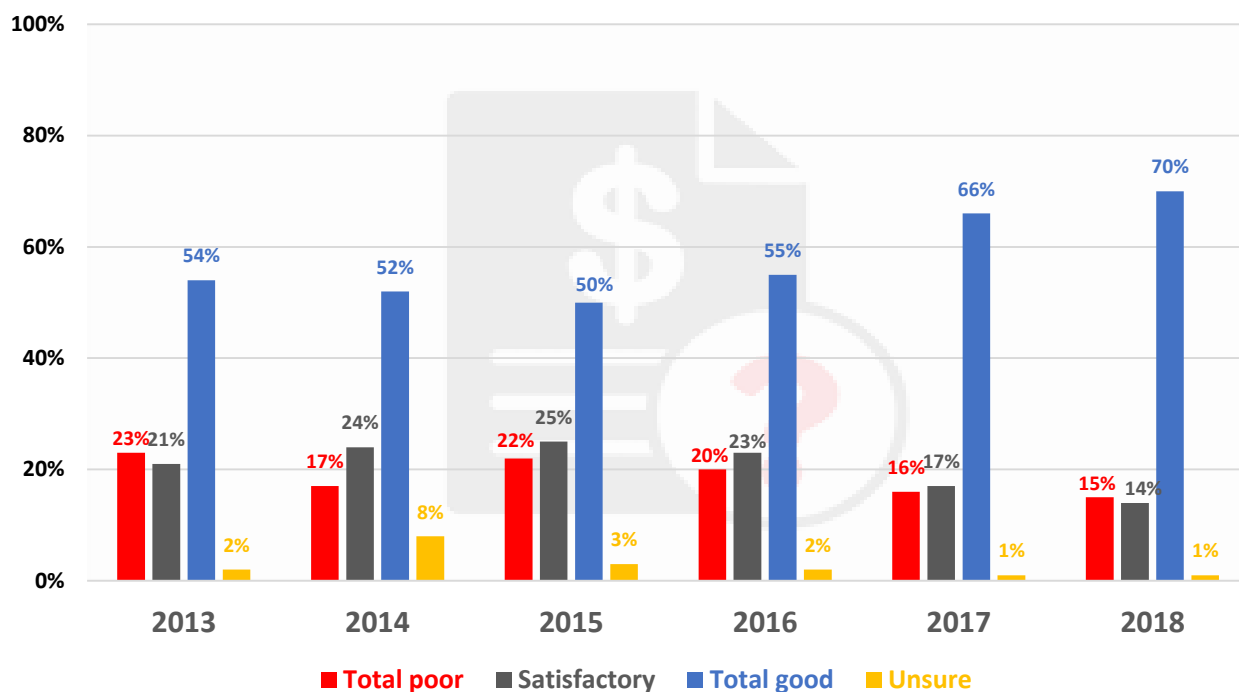


Demand is strong as more than eight in ten customers or 81% are interested in GSH providing them with information to help save money by being more energy efficient, slightly higher than in 2017 (79%).

Billing – Ease of Understanding

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




















Q33. “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?”



There has been a continued improvement in how consumers perceive their power bill as being easy to read and understand. Seven in ten (70%) rated their bill as good or very good in this survey period, up 4% over 2017 – the highest score since ratings commenced in this category in 2013.

Improvement Comments

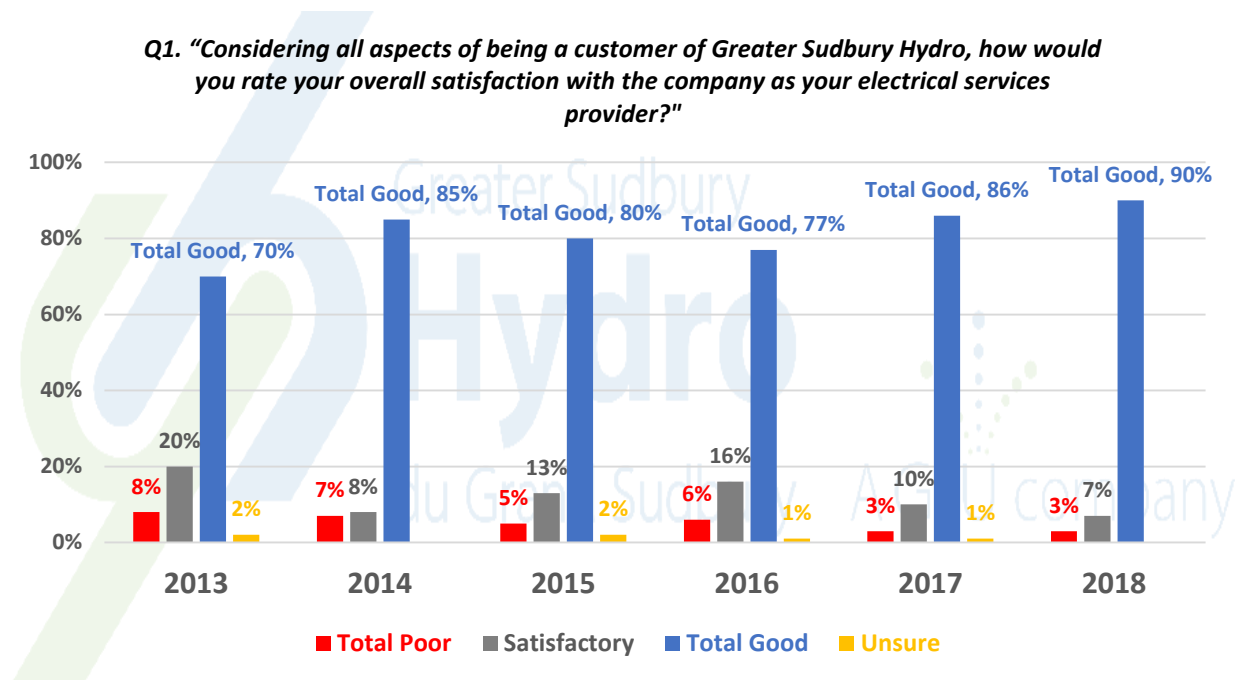
In a final open-ended or unaided question, all residential customers were probed about what they felt Greater Sudbury Hydro could do to better service its customers. Most responses as illustrated below, related to lowering or maintaining rates, providing more information about the costs associated with bills, having conservation initiatives and dealing with outages.

Q34. "What can Greater Sudbury Hydro do to better service its customers?"			
	<i>Don't know</i>	N=141	35%
	<i>Lower rates</i>	N=83	21%
	<i>Maintain rates / no increases</i>	N=51	13%
	<i>Explain cost of energy on bills</i>	N=27	7%
	<i>Fewer outages / quicker response to outages</i>	N=25	6%
	<i>More information on how to save / conserve energy</i>	N=18	5%
	<i>Information on what is involved in the price of hydro</i>	N=16	4%
	<i>Make bills easier to understand / clearer</i>	N=10	3%
	<i>Better communication</i>	N=8	2%
	<i>Incentives / programs for reducing electricity</i>	N=6	2%
	<i>More information on alternative energy options</i>	N=4	1%
	<i>More information / notice about power outages</i>	N=3	1%
	<i>Better hours of operation</i>	N=2	<1%
	<i>Earlier / monthly billing</i>	N=1	<1%
	<i>Improve the website / make it more user-friendly</i>	N=1	<1%
	<i>Improve customer service</i>	N=1	<1%
	<i>Invest in alternative energy sources</i>	N=1	<1%
	<i>Use less paper with bills</i>	N=1	<1%
	<i>End green energy programs (cost too much)</i>	N=1	<1%

EXECUTIVE SUMMARY – BUSINESS

Satisfaction

Respondents were first asked an overall satisfaction question. The following graph compares the December 2018 results with the previous five surveys. Result below combine the total poor (very poor & poor) and total good (good & very good) findings.

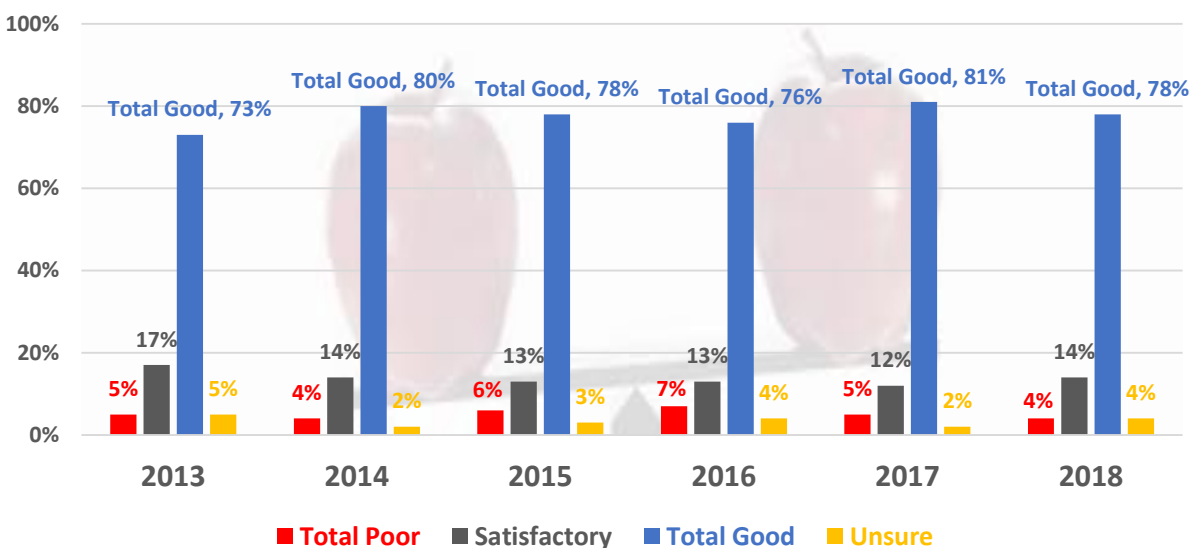


The overall satisfaction rating as represented by the combined good and very good responses increased by 4% compared to 2017 and is now at a very strong 90%. Total poor mentions remained at 3%, while the satisfactory score fell by -3%.

Customer Service

Next, business customers were asked the following comparative service question, rating GSH's service against other providers. Results below combine the total poor (very poor & poor) and total good (good & very good) findings.

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




Almost eight in ten or 78% of businesses provided a good or very good rating for GSH and its customer service in relation to other providers, a slight drop of -3% from the previous period. The negative score also dropped -1% while there were +2% increases for the satisfactory and do not know responses respectively.

Price & Value

Businesses were read the following short statement after which they were asked 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?"		2017	2018
	Review separate parts of combined statement	78%	68%
	Only look at total	21%	30%
	Don't know	1%	2%

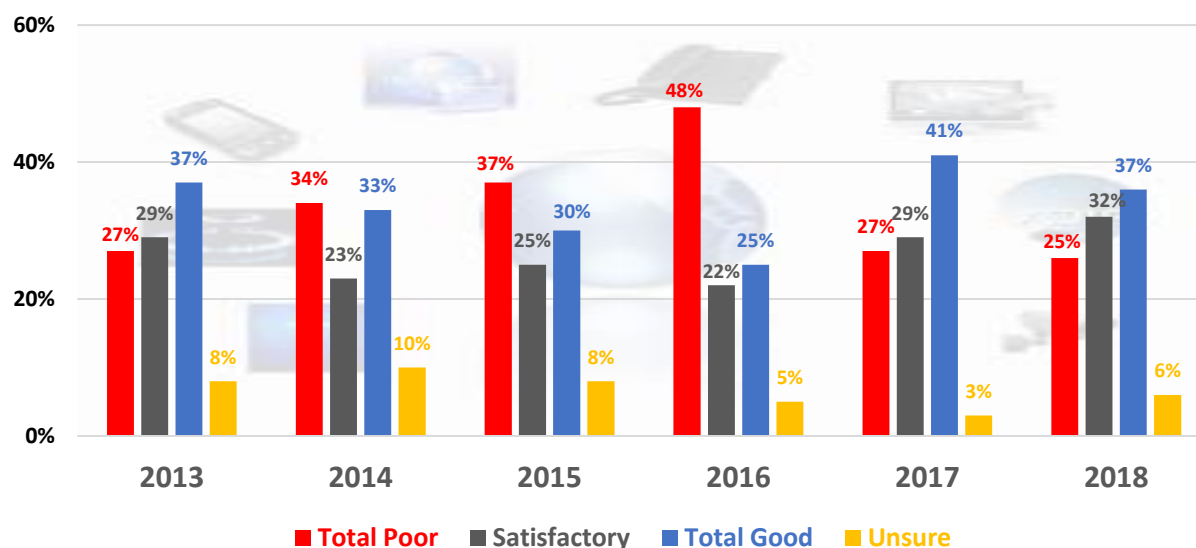
There were more business customers or 30% that said they only look at the total bill (+9%), however most or 68% (-10%) claimed to review separate parts of their combined statement, while 2% were unsure (+1%).

The following short statement was read to business respondents and then they were asked questions related to the cost they pay for electricity.

“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. Results below combine the total poor (very poor & poor) and total good (good & very good) findings.

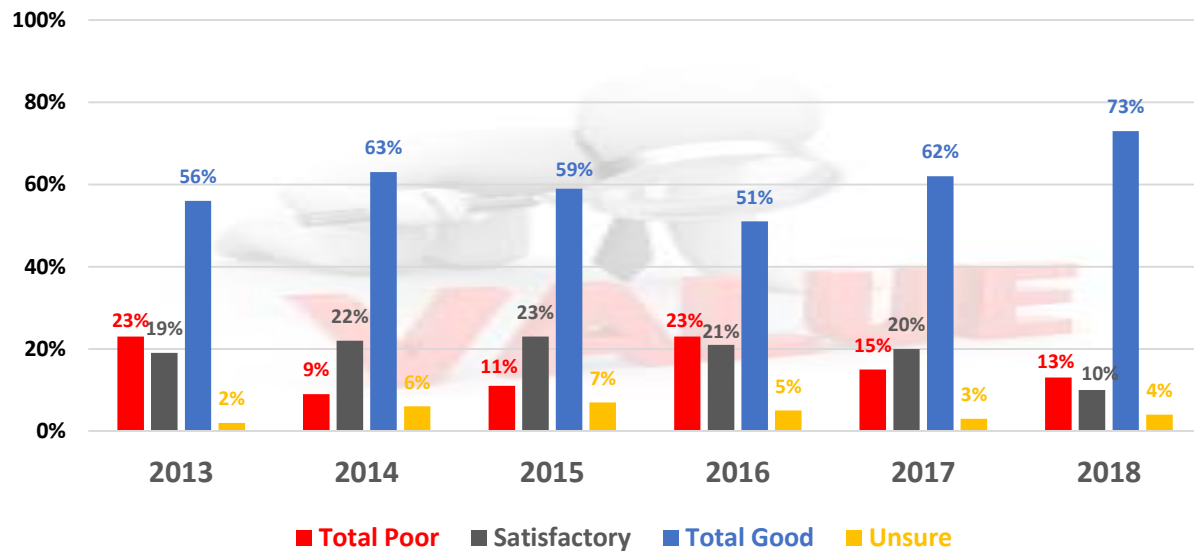
Q4. “How would you rate your satisfaction with the price you pay for electricity compared to what you pay for other (essential) business services?”



Satisfaction (good & very good ratings) with the comparative cost of electricity in relation to other essential services dropped by -4% over 2017. However, the negative score also fell by -2%, while there was an increase in the number of businesses that provided a satisfactory rating (+3%) or did not know (+3%).

Business 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 ratings has improved sharply by +11% to 73%. The total poor score is 13% (-2%), while -10% fewer gave a satisfactory score and 4% (+1%) were unsure.

Rating Greater Sudbury Hydro

Businesses 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 2018 top two (4 & 5) agreement ratings 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."

GSH IMAGE STATEMENTS – TOTAL AGREE RESPONSES	2013	2014	2015	2016	2017	2018
Q6. Greater Sudbury Hydro provides customers with reliable and good service.	69%	89%	85%	81%	84%	91%
Q8. Greater Sudbury Hydro meets its commitment to customers.	69%	86%	83%	79%	85%	86%
Q12. Greater Sudbury Hydro encourages efficient use of electricity among its customers.	55%	75%	71%	80%	82%	75%
Q10. Greater Sudbury Hydro is concerned about public safety and safe work practices.	65%	58%	56%	64%	74%	72%
Q9. GSH provides its customers with information about programs to help reduce their energy costs.	65%	71%	69%	76%	73%	70%
Q11. Greater Sudbury Hydro invests in and gives back to the community.	38%	29%	25%	31%	43%	42%
Q7. Greater Sudbury Hydro is committed to effectively managing a balanced budget.	25%	21%	21%	19%	17%	27%

The highest rated category in terms of agreement was for Greater Sudbury Hydro providing good and reliable service at 91%, a +7% improvement, followed by meeting its commitment to customers at 86% (+1%). Total agreement was next best for encouraging the efficient use of electricity by 75% – despite a -7% drop over 2017, followed by being concerned about public safety by 72% (-2%) and providing customers with information to help reduce energy costs by 70% (-2%).

Lowest scored were the areas of investing back in the community at 42% (-1% compared to 2017) and especially for being committed to effectively managing a balanced budget where 27% agreed, although this rating was up +10% over 2017.

There were a high number of businesses that answered do not know to questions about managing a balanced budget (55%), investing back in the community (36%) and to a lesser extent being concerned about safety (20%).

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 AREAS – TOTAL GOOD RESPONSES	2013	2014	2015	2016	2017	2018
Q13. The reliability of power supply	91%	90%	87%	89%	86%	92%
Q14. Prompt responses to power outages when they occur	74%	73%	70%	72%	80%	82%
Q15. Effectively scheduling planned power outages	61%	59%	55%	41%	58%	53%
Q16. Effectively communicating with customers about planned power interruptions in your area	62%	53%	50%	40%	49%	45%

The highest rated indicator continues to be for the reliability of the power supply at 92%, a +6% gain over 2017. Next best scored was the area of promptly responding to outages at 82% (+2%). Lower rated was the indicator related to scheduling planned outages at 53% (38% answered do not know), and for communicating with customers about planned interruption at 45% (42% responded do not know).

Rates Versus Outages

A question was asked related to the cost businesses are willing to pay for electricity system maintenance in relation to the security of service delivery or preventing outages.

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 OUTAGES TRADE OFF	2013	2014	2015	2016	2017	2018
	1-lowest rates – regular outages	3%	4%	3%	3%	1%	1%
	2-low rates – occasional outages	6%	3%	5%	4%	2%	1%
	3-neutral – a balance between rates and outages	57%	58%	65%	69%	79%	75%
	4-high rates – only a few outages	12%	18%	14%	9%	7%	9%
	5-highest rates – no outages	9%	3%	2%	1%	2%	3%
	Don't know	13%	14%	11%	14%	9%	11%

A three-quarters majority or 75% of businesses want a balance between rates and outages, consistent with, but -4% lower than in 2017. Only 2% (-1%) are willing to have lower prices at the cost of some form of outage, 12% (+3%) would tolerate a higher rate for fewer or no interruptions and 11% (+2%) did not know or were unsure.

Payment Options

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

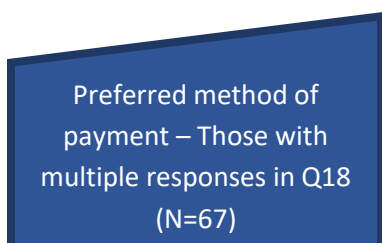
Q18. "Please tell me if you are interested in each of the following payment methods for your electricity bills?"

	PAYMENT OPTION INTEREST	2013	2014	2015	2016	2017	2018
	Online / telephone banking	51%	42%	47%	62%	70%	67%
	Equal monthly payment plan	36%	41%	43%	56%	59%	55%
	Automatic withdrawal from your bank account	22%	43%	42%	37%	40%	36%
	Online at the Sudbury Hydro Website	20%	16%	19%	22%	20%	19%
	Payment at the Greater Sudbury Hydro office	25%	28%	19%	16%	18%	14%

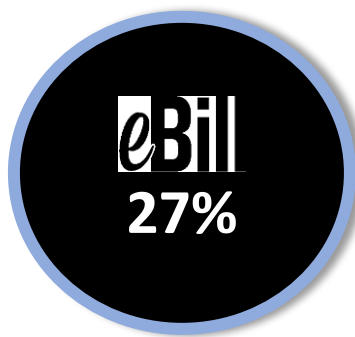
The payment option that remains of most interest to businesses is online or telephone banking at 67% (-3%), followed by 55% that favour an equal monthly payment plan (-4%). Interest was next strongest for automatic bank withdrawals at 36% (-4%), while it was low at 19% (-1%) for payment through the GSH website and lowest at 14% (-4%) for payment at the GSH office.

Business customers that expressed interest in multiple payment options in Q18 (N=67), 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?"

	Preferred method of payment – Those with multiple responses in Q18 (N=67)	
	Online/telephone banking through your financial institution	43%
	Equal monthly payment plan	25%
	Automatic withdrawal from your bank account	19%
	Payment at the Greater Sudbury Hydro office	9%
	Online at Sudbury Hydro Website	3%

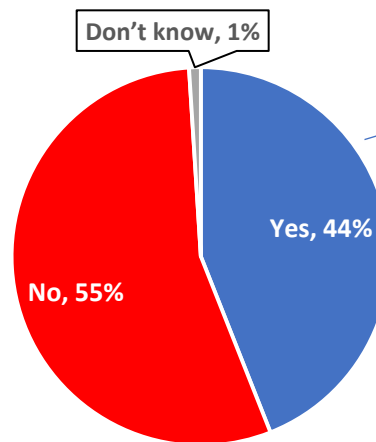
Online or telephone banking at their financial institution was most named by 43%, while an almost equal number then stated equal monthly payments (25%) and automatic withdrawal (19%). There is lower interest in payments at the GSH office and online transactions through the website.



Percentage of businesses surveyed that get an e-bill as identified in Q20

The 73% (N=73) that do not currently receive an electronic statement were asked if they would be interested in receiving an e-bill.

Q21. "Would you be interested in receiving your bill electronically?"



A total of 44% claimed that they have an interest in getting an electronic statement, 55% do not and 1% didn't know.

The 44% (N=32) interested in an e-bill (Q21) were asked what would further encourage them.

Q22a. "What would encourage you to switch to electronic or e-billing?"

It would use less paper	N=11	34%
Easier / more convenient	N=7	22%
Don't know	N=7	22%
Receive bill quicker / on time	N=4	13%
Having more information about it	N=2	6%
It's more manageable	N=1	3%

The 55% (N=40) not interested (Q21) and 1% (N=1) unsure were asked the following.

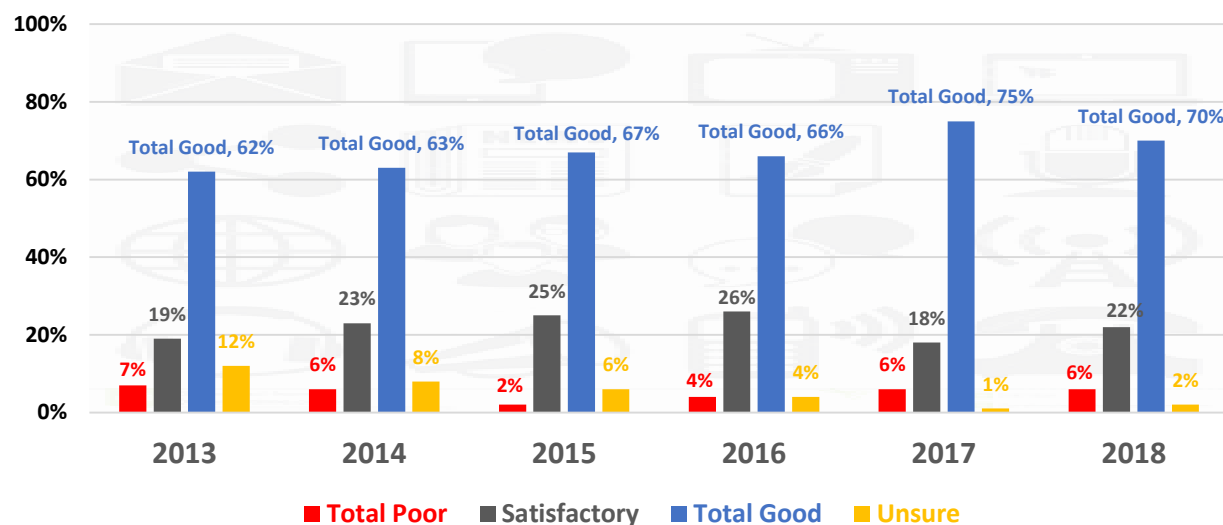
Q22b. "What reasons are preventing you from considering a switch to electronic or e-billing?"

Get too many emails	N=11	27%
Like having paper copy	N=9	22%
Don't know	N=8	20%
Poor past experience with e-billing	N=4	10%
Prefer receiving them in mail	N=3	7%
Habit / don't like change	N=2	5%
Not tech knowledgeable	N=2	5%
Can't remember all passwords	N=1	2%
We don't have an email address	N=1	2%

Communication

Business respondents were asked a series of indicators about communications, starting with a rating question about how GSH communicates with its business customers.








Q23. "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 cus"



Seventy-percent of businesses rated communications as being good or very good, down -5% from 2017, while the poor or very poor rating remains low at 6%. Slightly more (+4%) feel performance in this area is satisfactory and 2% were unsure (+1%).

Businesses were asked in an open-ended unaided question about their preferred method to have Greater Sudbury Hydro communicate information to them.






Q24. "What is your preferred method to have Greater Sudbury Hydro communicate information to you?"

	E-mail from the company	N=58	58%
	Bill inserts	N=12	12%
	Social Media	N=11	11%
	Direct mail	N=10	10%
	GSH Website	N=6	6%
	Don't know/no preference	N=2	2%
	Telephone	N=1	1%

Email is the preferred method by which most or 58% want to have the utility communicate with them, while the remaining responses were spread among bill inserts, social media, mailings and thorough the GSH website.

In another open or unaided question, business customers were asked about how they would most like to communicate with Greater Sudbury Hydro.

Q25. "And as a customer, what is your preferred method that you would like to communicate with Greater Sudbury Hydro?"

	Telephone	N=59	59%
	Email	N=34	34%
	Social media	N=5	5%
	Link or form on GSH website	N=1	1%
	Don't know/no preference	N=1	1%

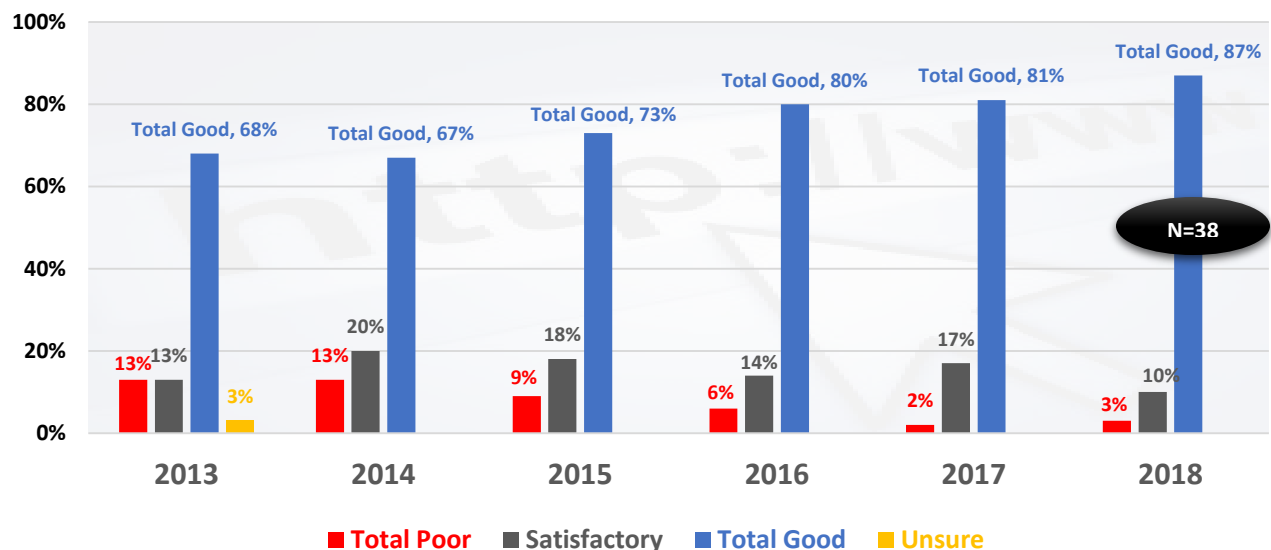
Telephone and email are the preferred ways that businesses want to be able to reach out to Greater Sudbury Hydro.

Website

A total of 38% (42% in 2017) of business customers answered in Q26 that they have visited the GSH website over the past 12 months .









The 38% (N=38) that visited the site were then asked three follow up questions on the information that the website contains.

Q27. "How would you rate the quality of the information provided on the Greater Sudbury Hydro website?"



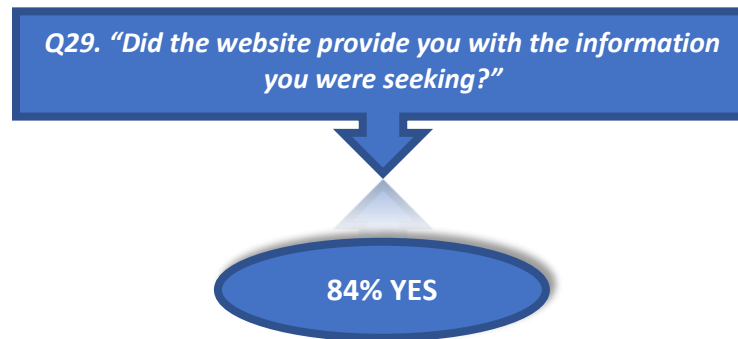
There is very high satisfaction among businesses that have visited the GSH site with 87% saying the quality of the information was good or very good (+6% over 2017).

The N=38 website visitors were then asked about the information they were looking for. Multiple responses were accepted and are illustrated below.

Q28. "What information did you look for?"			
	Account information	N=13	28%
	Energy conservation	N=10	21%
	Rates & Fees	N=9	19%
	Outage information	N=5	11%
	Corporate info	N=3	6%
	Report an issue	N=3	6%
	News or Developments	N=2	4%
	Contact information	N=2	4%

Businesses visited the website for a variety of reasons, but mostly for account information, to find out about conservation initiatives and to inquire about rates or fees and outages.

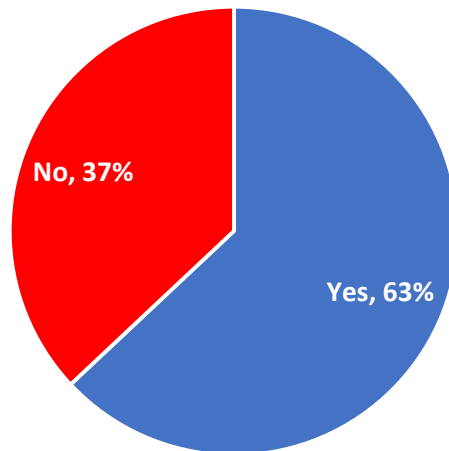
The N=38 website visitors were then asked a final question about the site – namely if they found what they were looking for.



Online Account Management

All N=100 business respondents were next asked about managing their account online.

Q30. "Would you be interested in being able to manage your Greater Sudbury Hydro account online?"

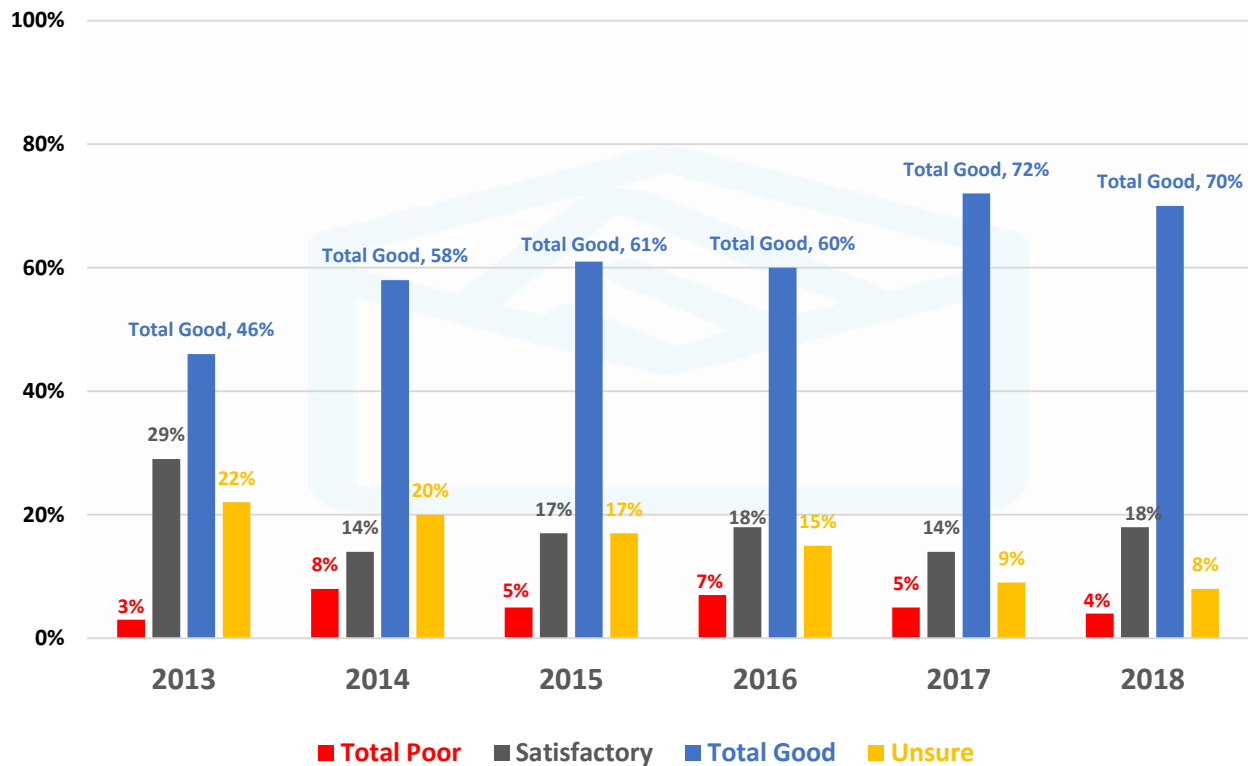


More than six in ten or 63% said they would be interested in managing their account online, compared to 67% in 2017.

Rating Bill Inserts & Links

All N=100 businesses then rated the bill insert or electronic link information provided by Greater Sudbury Hydro.

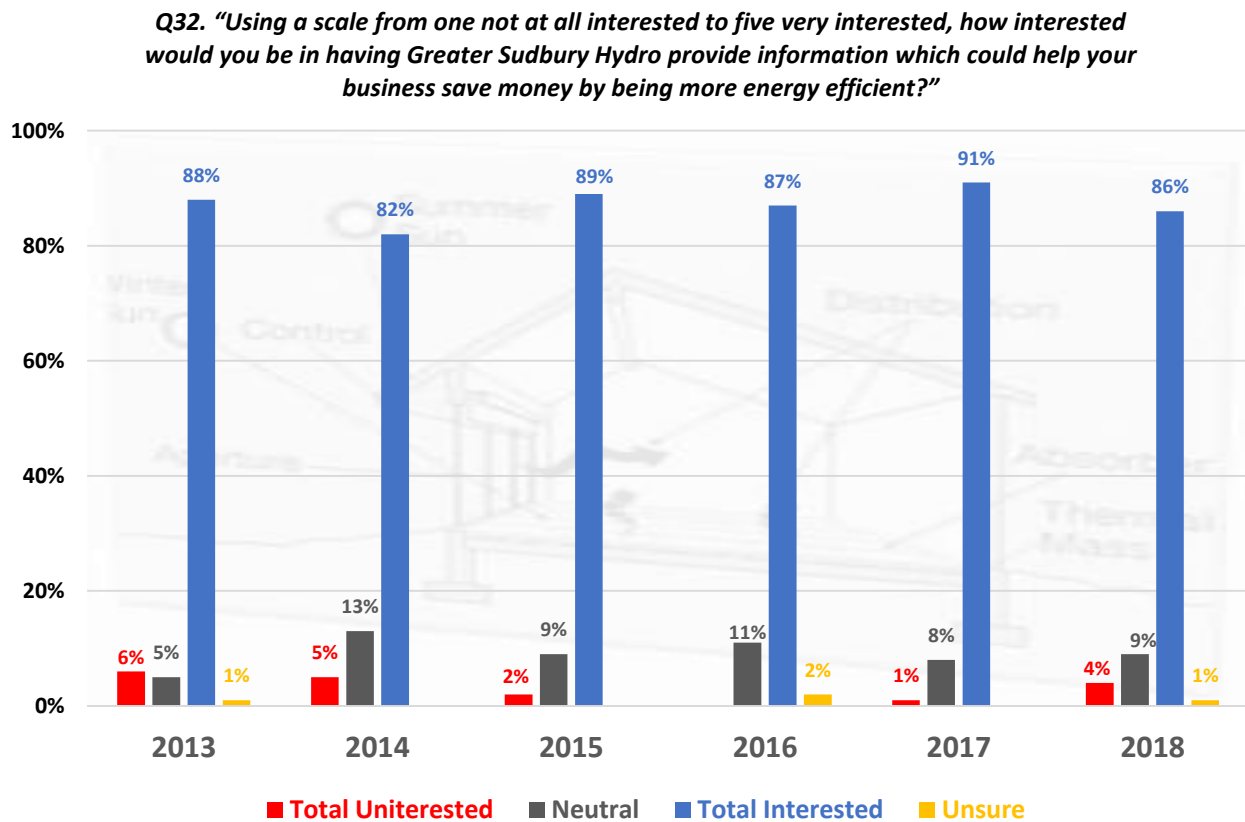
Q31. "From time to time, Sudbury Hydro attaches information to your bill in the form of a bill insert, or for electronic bills in the form of a link. Using a scale from one very poor to five very good, how would you rate the overall quality of each of the



The good and very good rating provided for bill inserts or electronic bill links is consistent in this survey period at 70%, compared to 72% in the previous poll.

Energy Efficiency

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

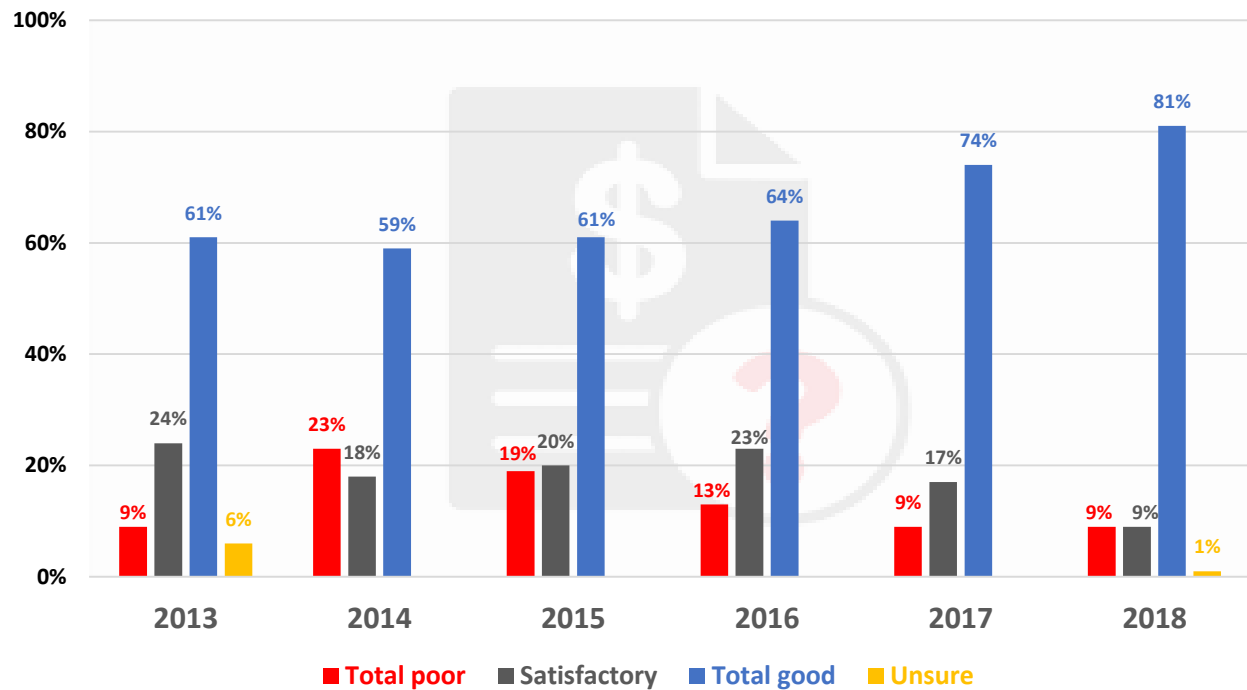


Consumer interest in obtaining energy efficiency information remains very strong at 86%.

Billing – Ease of Understanding

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














Q33. “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?”



There has been a steady and solid improvement since 2016 in the area of bills being easy to read and understand. Eighty-one percent provided a good or very good rating – up 7% from 2017 and +17% over 2016.

Improvement Comments

In a final open ended or unaided question, all business customers were asked what they felt Greater Sudbury Hydro could do to better service its customers.

Q34. "What can Greater Sudbury Hydro do to better service its customers?"			
	<i>Don't know</i>	<i>N=32</i>	<i>32%</i>
	<i>Maintain rates / no increases</i>	<i>N=28</i>	<i>28%</i>
	<i>Lower rates</i>	<i>N=17</i>	<i>17%</i>
	<i>Information on what is involved in the price of hydro</i>	<i>N=9</i>	<i>9%</i>
	<i>Make bills easier to understand / clearer</i>	<i>N=3</i>	<i>3%</i>
	<i>Better communication</i>	<i>N=2</i>	<i>2%</i>
	<i>Improve the website / make it user-friendly</i>	<i>N=2</i>	<i>2%</i>
	<i>Easier to reach someone at office</i>	<i>N=2</i>	<i>2%</i>
	<i>Better hours of operation</i>	<i>N=1</i>	<i>1%</i>
	<i>No interruptions / outages</i>	<i>N=1</i>	<i>1%</i>
	<i>More information on how to save / conserve energy</i>	<i>N=1</i>	<i>1%</i>
	<i>Accept Visa Payments</i>	<i>N=1</i>	<i>1%</i>
	<i>Credits should be refunded instead of going towards next bill</i>	<i>N=1</i>	<i>1%</i>

While one-third had no comments to add, most mentions related to maintaining rates, lowering them and providing more information about what constitutes a power bill.