



Annual Customer Survey Report – 2019



December 2019

TABLE OF CONTENTS

METHODOLOGY & LOGISTICS	2
EXECUTIVE SUMMARY – RESIDENTIAL	4
Satisfaction	4
Customer Service	5
Price & Value	6
Rating Greater Sudbury Hydro – Image Areas	9
Rating Performance	11
Rates vs Outages	12
Payment Options & Online Management	13
Communication	15
Website	17
Rating Bill Inserts & Links	19
Energy Efficiency	20
Billing – Ease of Understanding	21
Improvement Comments	22
EXECUTIVE SUMMARY – BUSINESS	23
Satisfaction	23
Customer Service	24
Price & Value	25
Rating Greater Sudbury Hydro – Image Areas	28
Rating Performance	30
Rates vs Outages	31
Payment Options & Online Management	32
Communication	34
Website	36
Rating Bill Inserts & Links	38
Energy Efficiency	39
Billing – Ease of Understanding	40
Improvement Comments	41

METHODOLOGY & LOGISTICS

Overview

Greater Sudbury Hydro (GSH) commissioned Oraclepoll to conduct a telephone satisfaction survey of its customers. The purpose of this survey process was to obtain customer input across a range of indicators related to customer satisfaction.

This report represents the findings from the current December 2019 customer satisfaction survey of Greater Sudbury Hydro (GSH) customers. Baseline survey data was first benchmarked by Oraclepoll in December 2013 and then tracked in each subsequent December up to this current 2019 period. In each of these seven (N=7) survey waves there has been a N=400 residential customer sample segment and a N=100 business component.

Within this report, there are the findings from the December 2019 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%.

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.

Logistics

Interviews were completed between the days of December 1st to December 13th, 2019.

Confidence

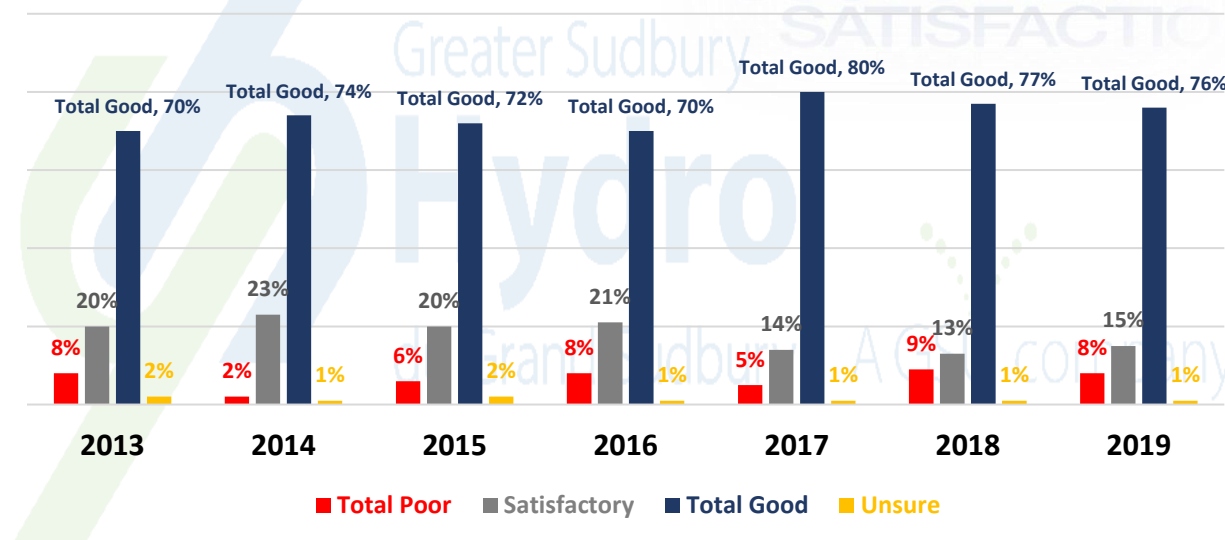
The margin of error for the N=400-person residential survey is $\pm 4.9\%$, 19/20 times and $\pm 9.8\%$, 19/20 times for the sample of N=100 businesses.

EXECUTIVE SUMMARY – RESIDENTIAL

Satisfaction

Residential customers were first asked an overall satisfaction question. The following graph compares the December 2019 results with the previous six 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?”



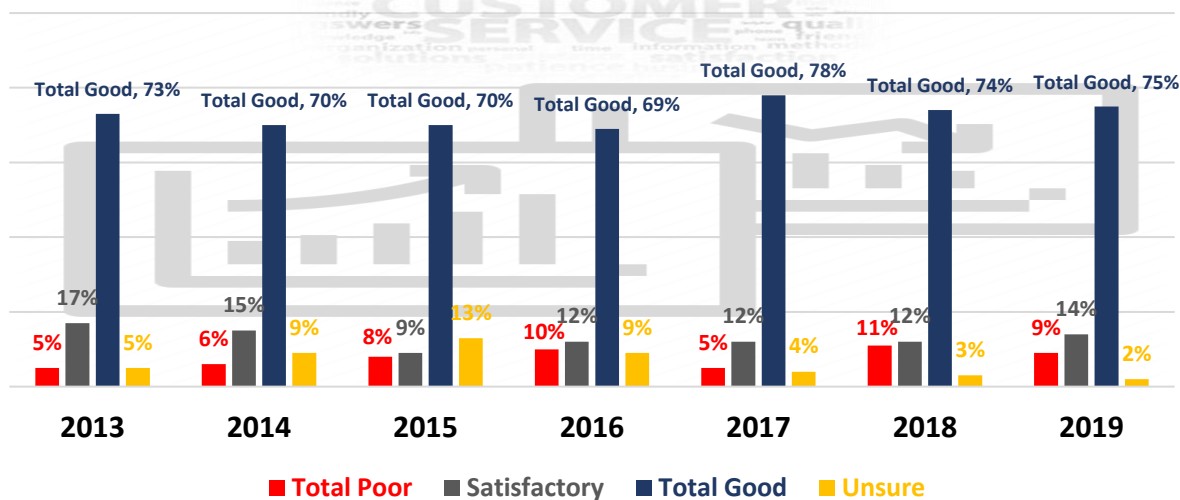
Current results are consistent with 2018 as 76% accorded a total good response (38% good & 38% very good) for their overall satisfaction, as did 77% in the previous wave. While higher than findings from 2013 to 2016, they are off slightly from the peak result in 2017. The total poor or dissatisfied response was down -1% to 8% (2% very poor & 6% poor), while 15% (+2%) had a satisfactory opinion.

Higher total good ratings were provided by females (79%) compared to males (71%), those 55-64 (81%) in relation to 18-34-year old's (70%) and the income cohorts of under \$50,000 (79%) and \$50,000-\$74,999 (79%).

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 (39%) and very good (36%) is 75%, a slight improvement of +1% compared to 2018. While the percentage of satisfactory responses also increased +2 to 14%, there was a -2% drop in the poor score to 9%. Two percent were unsure (-1%).

The lowest earners in the under \$50,000 cohort accorded the lowest good and very good rating at 65% along with the highest combined poor score at 17% – while those making \$50,000-\$74,999 (83%) and \$75,000-\$99,999 (83%) gave the best positive rating. Females (79%) were also inclined to provide a good rating in relation to males (73%) as were older customers 65+ (81%).

Price & Value

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	2019
	Review separate parts of combined statement	64%	66%	61%
	Only look at total	26%	27%	33%
	Don't know / not applicable	10%	7%	6%

Sixty-one percent of customers said they review separate parts of their bill, a -5% drop compared to 2018. One-third only look at the total (+6%) and 6% were unsure or said this did not apply to them.

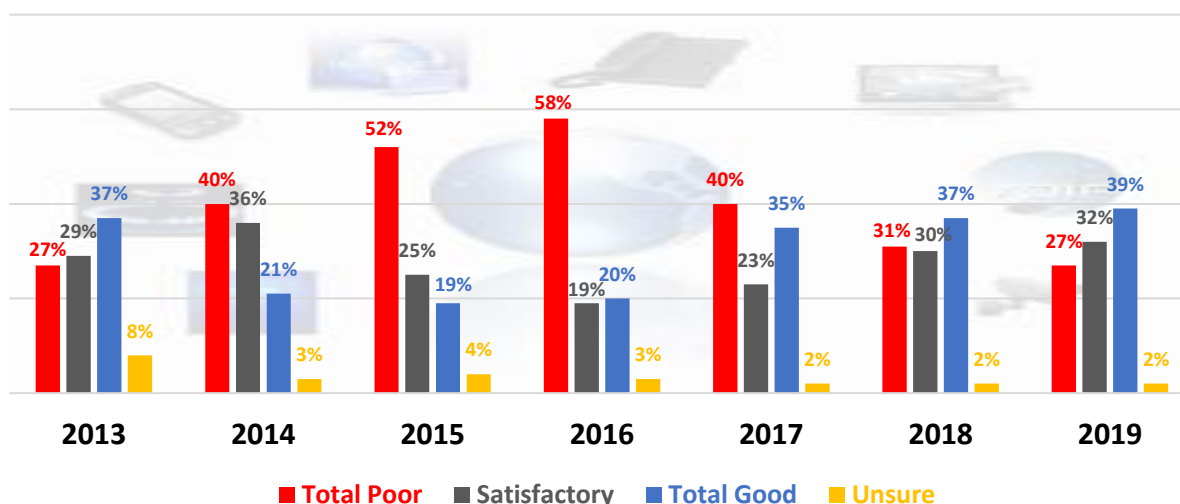
Lower and mid-earners making under \$50,000 (65%) and \$50,000-\$74,999 (64%), as well as seniors 65+ years of age (72%) were most likely to review separate parts of the combined statement. More females (63%) also review separate parts in relation to males (57%).

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 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)?”

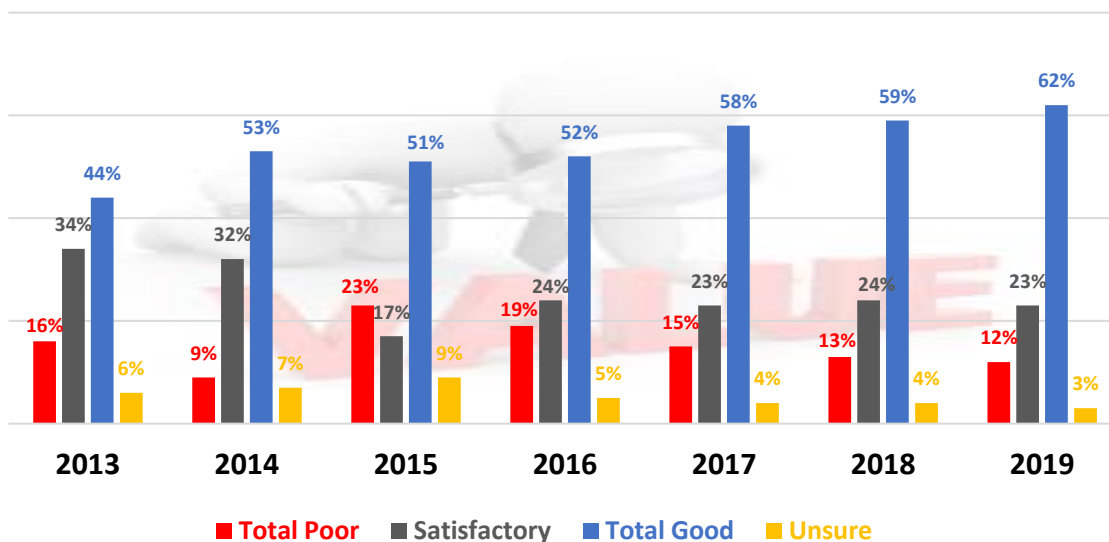


Thirty-nine percent gave a good or very good score, up +2% over 2018 and this is the highest rating recorded. The number of satisfactory responses also increased +2% to 32% over the previous survey and 2% remained undecided. There has been a continuing decrease in the percentage of customers that are dissatisfied with the cost of electricity in relation to other services as -4% fewer in this wave or 27% provided a poor or very poor score compare to 31% in 2018.

The strongest total good results were provided by customers aged 45-54 (44%) and 55-64 (39%), the highest earners in the \$100,000+ bracket (62%) and males (44%) in relation to females (33%).

Customers next 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 once again in this survey period by +3% to 62% – the strongest showing since data collection began in 2013. The total poor score is now at 12% (-1% over 2018), while a similar 23% (24% in 2018) accorded a satisfactory score and 3% (-1%) were unsure.

Most satisfied (total good) were males (67% versus 58% females), those aged 55 to 64 (69%) and 65+ (70%), as well as respondents in the \$75,000 to \$99,999 (75%) and \$100,000+ cohorts (79%).

Rating Greater Sudbury Hydro – Image Areas

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.

“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.”

IMAGE STATEMENTS – TOTAL AGREE RESPONSES	2013	2014	2015	2016	2017	2018	2019
Q6. Greater Sudbury Hydro provides customers with reliable and good service.	77%	75%	73%	72%	79%	82%	82%
Q7. Greater Sudbury Hydro is committed to effectively managing a balanced budget.	25%	33%	32%	29%	30%	40%	37%
Q8. Greater Sudbury Hydro meets its commitment to customers.	80%	76%	75%	73%	78%	79%	81%
Q9. GSH provides its customers with information about programs to help reduce their energy costs.	58%	71%	61%	59%	65%	72%	68%
Q10. Greater Sudbury Hydro is concerned about public safety and safe work practices.	48%	63%	54%	60%	62%	63%	62%
Q11. Greater Sudbury Hydro encourages efficient use of electricity among its customers.	62%	72%	74%	71%	75%	80%	74%
Q12. Greater Sudbury Hydro invests in and gives back to the community.	22%	28%	26%	30%	28%	29%	43%

As in 2018, GSH rated highest in terms of total agreement for providing customers with good service at 82% (unchanged over 2018), closely followed by meeting its commitment to customers at 81%, a slight +2% improvement.

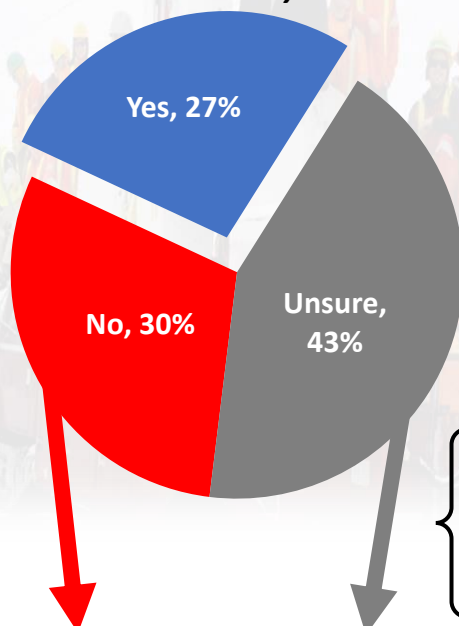
The two indicators related to energy efficiency, including encouraging efficient use (74%) and providing information about programs to reduce costs (68%) followed, although results for both dropped -6% and -4% respectively.

Concern about public safety and safe work practises was rated lower at 62% (24% were unsure), but findings are similar to 2018 (-1%). While only 43% agreed GSH invests or gives back to the community, this represents a +14% gain over the previous survey period – 40% were unsure.

The question on being committed to effectively managing a balanced budget had the fewest respondents giving an agree or strongly agree response at 37% (-3%), a high 36% were unsure or did not know.

Two new questions were asked in the 2019 survey period. The first probed customers if they thought GSH is doing enough to give back to the community. A follow-up was then asked to those respondents that answered no (30%, N=120) or unsure (43%, N=172) about the areas they would like to see GSH give back.

Q13. "Do you think Greater Sudbury Hydro does enough to invest in or give back to the community?"



In question Q12 there were 43% that agreed GSH invests in and gives back to the community. However, Q13 identified that a lesser 27% feel that it is doing enough. Three in ten said it is not doing enough and a significant 43% were unsure or did not know.

Q14. "In what areas would you like to see GSH invest in or give back?"

<i>Don't know</i>	31%
<i>Food Bank</i>	14%
<i>Lower the cost (for those in need)</i>	12%
<i>Health care / hospital</i>	10%
<i>School programs / education</i>	9%
<i>Homeless / shelters</i>	7%
<i>Community programs / sports / arts / culture</i>	5%
<i>Help people reduce energy costs</i>	4%
<i>Help low income families</i>	3%
<i>Addiction programs / help with opioid crisis</i>	2%
<i>Updated lines / streetlights / underground wires</i>	2%

While slightly more than three in ten were unsure of the areas to be invested, mentions from those with opinions varied. They included helping those in need through food banks, homeless shelters and assisting low income families, including with their energy costs. Other mentions related to health care, school or education supports and community programs (arts, culture, sports etc.).

Rating Performance

Respondents were then asked to rate the performance of Greater Sudbury Hydro across four indicators using a five-point scale (1-very poor to 5-very good). 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	2019
Q15. The reliability of power supply	83%	92%	90%	88%	89%	82%	85%
Q16. Prompt responses to power outages when they occur	72%	82%	81%	84%	86%	80%	78%
Q17. Effectively scheduling planned power outages	57%	54%	66%	64%	70%	68%	65%
Q18. Effectively communicating with customers about planned power interruptions in your area	55%	56%	68%	66%	63%	61%	60%

The highest rated performance indicator remains the one related to the reliability of the power supply at 85%, an increase of +3% over 2018. Next best scored was the area of promptly responding to outages at 78% – similar but slightly lower compared to the previous wave by -2%.

Lower rated by 65% was for effectively scheduling planned power outages (-3% lower than 2018) and for effectively communicating with customers about planned power interruptions in their area by 60% (-1%). While the good and very good scores were for the most part consistent over 2018, a high 23% answered do not know or unsure for each.

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.

Q19. "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	2019
1-lowest rates – regular outages	2%	4%	4%	3%	2%	1%	2%
2-low rates – occasional outages	15%	3%	8%	7%	5%	6%	10%
3-neutral – a balance between rates and outages	44%	55%	47%	54%	59%	61%	58%
4-high rates – only a few outages	15%	13%	11%	12%	11%	13%	12%
5-highest rates – no outages	3%	5%	6%	5%	8%	7%	4%
Don't know	22%	21%	24%	19%	15%	12%	14%

Customers continue to most want a balance between rates and outages at 58%, although marginally -3% lower than in 2018. There was an increase in the number of customers willing tolerate outages for lower rates (12% or +5%) compared to 2018 with 10% saying low rates with occasional outages (+4%) and 2% the lowest rates and regular outages (+1%). Conversely, fewer or 16% (-4%) want diminished outages for some form of higher rates – 12% high rates and no outages (-1%) and 4% the highest rates and no outages (-3%). Fourteen percent were undecided or unsure (+2%).

Payment Options & Online Management

A series of new questions were asked about payments, the first of which probes about current methods for paying their GSH bill. Options were read, and multiple responses were accepted.

Q20. "Which of the following methods do you currently use to pay your GSH bill?"

READ OPTIONS

64%	Online/telephone banking through your financial institution
37%	Equal monthly payment plan
32%	Automatic withdrawal from your bank account
8%	Online at Sudbury Hydro Website
3%	Payment at the Greater Sudbury Hydro office

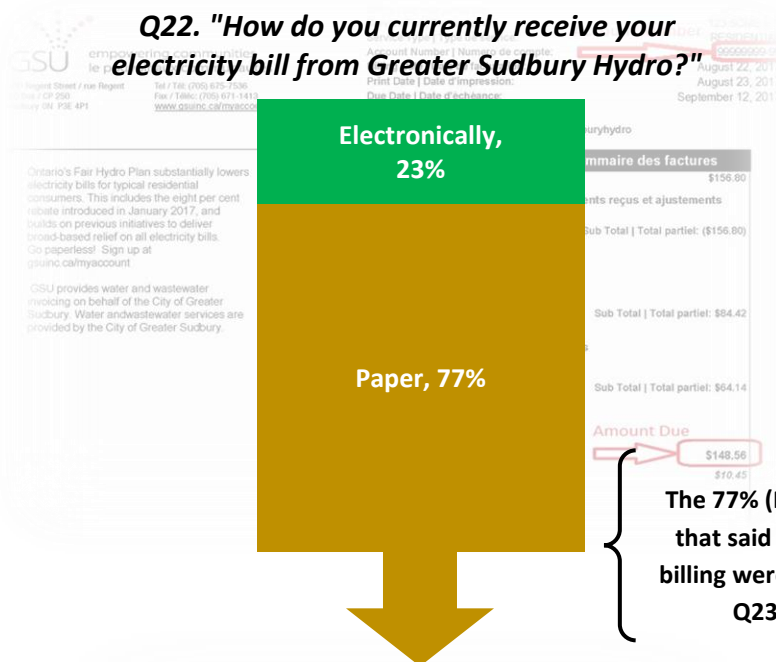
Online or telephone banking was most named by 64% as a method of payment, followed by automatic withdrawal at 32%, while only 8% pay through the GSH website and 3% at the office. There are 37% that claim they are on an equal monthly plan in addition to paying through one of the aforementioned methods.

They were next asked about their preferred method of payment asking the same options. One response was accepted.

Q21. "What would be your preferred method of payment?"		
	Online/telephone banking through your financial institution	64%
	Automatic withdrawal from your bank account	22%
	Equal monthly payment plan	9%
	Payment at the Greater Sudbury Hydro office	3%
	Online at Sudbury Hydro Website	3%

Online banking was once again most named by 64%, followed by automatic withdrawal at 22%, while only 3% cited each of the office and website. Nine percent referenced equal monthly billing.

Customers were then asked how they receive their bill from Greater Sudbury Hydro. Respondents that said paper (77%, N=308) were then asked an open-ended or unaided follow-up about what would get them to move to paperless billing.



Twenty-three percent said they get a bill electronically (22% in 2018). Those most likely to get an electronic bill are 18-34-year old's (36%) and higher earners making \$100,000+ (32%). Least likely were seniors 65+ (6%) and those making the least under \$50,000 (19%).

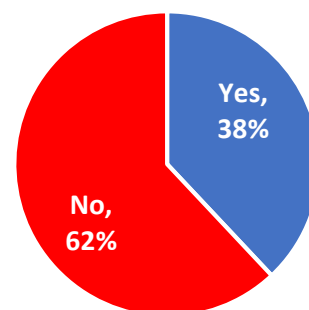
Q23. "What would most convince you to move to electronic or paperless billing?"

Don't know	21%
It would use less paper	15%
If it would be easier / more convenient	14%
If it would have more information in it (details)	11%
Offer the option / let customers know of option	9%
Nothing no interest	8%
If I could receive bill quicker / on time	7%
If easy to access (current / past bills)	5%
I plan to, just haven't done it yet	3%
If a discount / lower price was offered	2%
Nothing I prefer a hard copy	2%
Keep forgetting passwords	1%
If there was online security	1%

Responses varied but themes included using less paper, ease or convenience and getting quicker more detailed information. There were 21% that answered don't know and 10% that have no interest or said nothing would convince them, preferring paper.

All N=400 customers were then asked if they manage their GSH account online of which 38% said they yes.

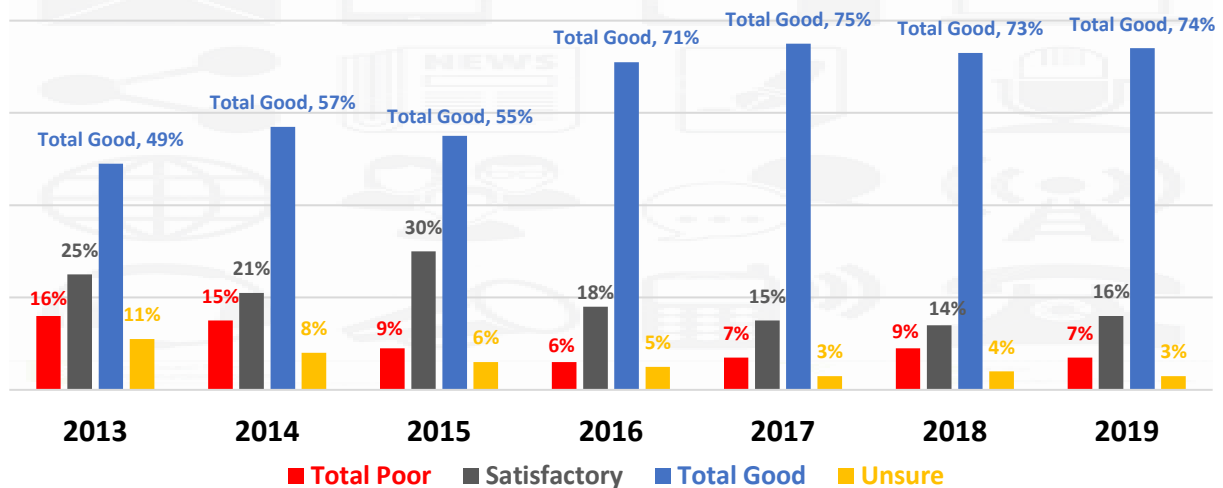
Q24. "Do You currently manage your GSH account Online?"



Communication

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

Q25. "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."



The positive (good & very good) rating for communicating with customers has been consistent over the past three touch points with 74% rating it as good or very good, up slightly +1% over 2018. The poor rating dropped -2%, while the satisfactory picked up +2% and those unsure remained the same. Those aged 35-44 (80%) and earning \$100,000+ provided higher scores.

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

Q26. "What is your preferred method to have Greater Sudbury Hydro communicate information to you?"

<i>E-mail from the company</i>	33%
<i>Bill inserts / attachments to e-bill</i>	20%
<i>Social media, such as Facebook or Twitter</i>	18%
<i>Direct mail</i>	15%
<i>Greater Sudbury Hydro Website</i>	8%
<i>Don't know/no preference</i>	4%
<i>Radio</i>	1%
<i>Telephone</i>	1%
<i>Newspaper advertising</i>	1%

An email from the company was most named by 33% (18 to 34 – 55%, 35 to 44 – 43% & 45 to 54 – 40%), followed by bill inserts (55 to 64 – 32 & 65 or older – 36%), social media (18 to 34 – 31%, 35 to 44 – 23% & 45 to 54 – 24%) and direct mail (55 to 64 – 27% & 65 or older – 33%).

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

Q27. "And as a customer, what is your preferred method that you would like to communicate with Greater Sudbury Hydro?"

<i>Telephone</i>	56%
<i>Email</i>	24%
<i>Social media</i>	12%
<i>In person at office</i>	4%
<i>Link or form on GSH Website</i>	2%
<i>Don't know/no preference</i>	2%
<i>Regular mail</i>	1%

When wanting to initiate communication with GSH, telephone is the preferred approach by 56%. Next most named was an email by 24%, followed by social media by 12%, an in-person visit by 4%, a website link by 2% and regular mail by 1%.

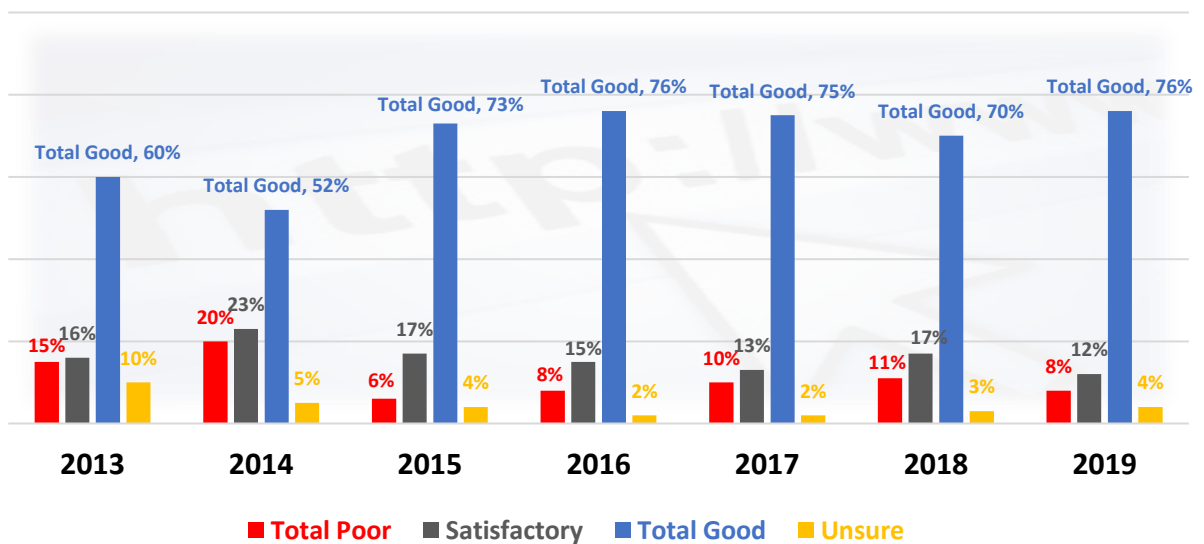
Website



A total of 38% (N=152) of customers, compared to 27% in 2018, said they have visited the GSH website over the past 12 months .

The 38% (N=152) that visited the site were then asked three follow up questions on the information that the website contains.

Q29. "How would you rate the quality of the information provided on the Greater Sudbury Hydro website?"



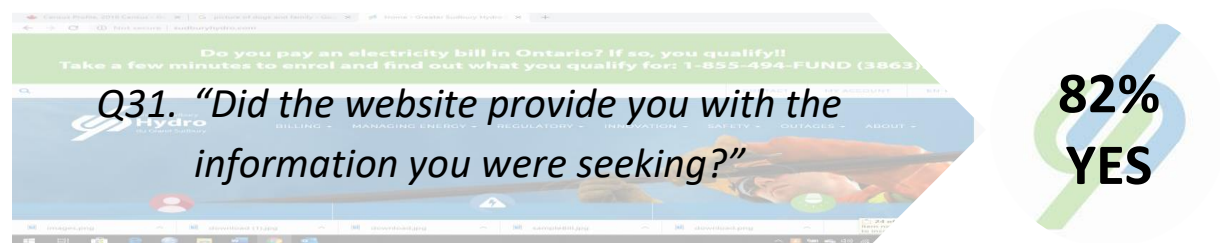
More than three quarters or 76% rated the website quality of information as being good or very good, a +6% hike compared to 2018, while the negative score dropped to 8% (-3%), as did the satisfactory rating to 12% (-5%). Four percent were unsure (-1%).

The N=152 (38%) of website visitors were then asked about the information they were looking for. Multiple responses were accepted and are illustrated below.

Q30. "What information did you look for?"	
<i>Account information</i>	36%
<i>Energy conservation</i>	21%
<i>News or Developments</i>	16%
<i>Rates & Fees</i>	12%
<i>Environment/Safety</i>	6%
<i>Contact information</i>	4%
<i>Outages</i>	3%
<i>Corporate info</i>	2%

Seeking account information was most mentioned, followed by information on energy conservation, news and updates on rates and fees.

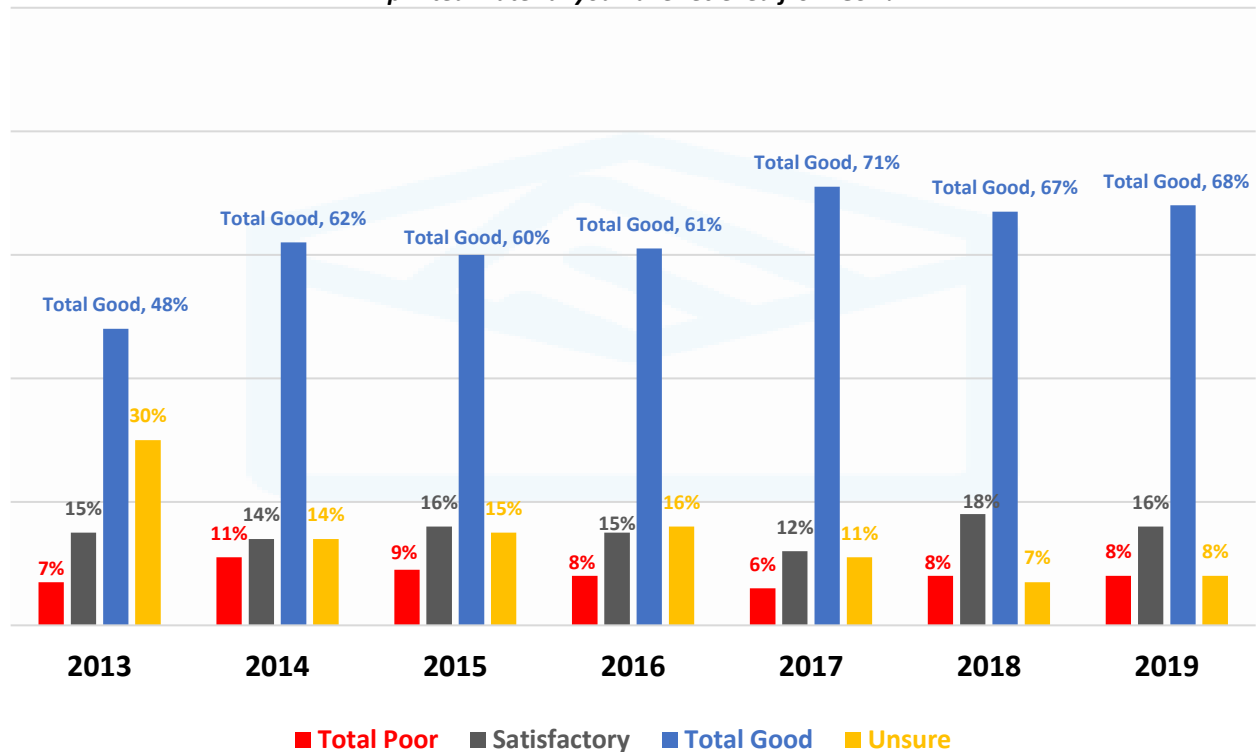
The N=152 website visitors were then asked if they found the information on the website they were looking for. Eighty-two said yes, they found the information, compared to 79% in 2018.



Rating Bill Inserts & Links

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

Q32. "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 and other printed material you have recieved from GSH?"

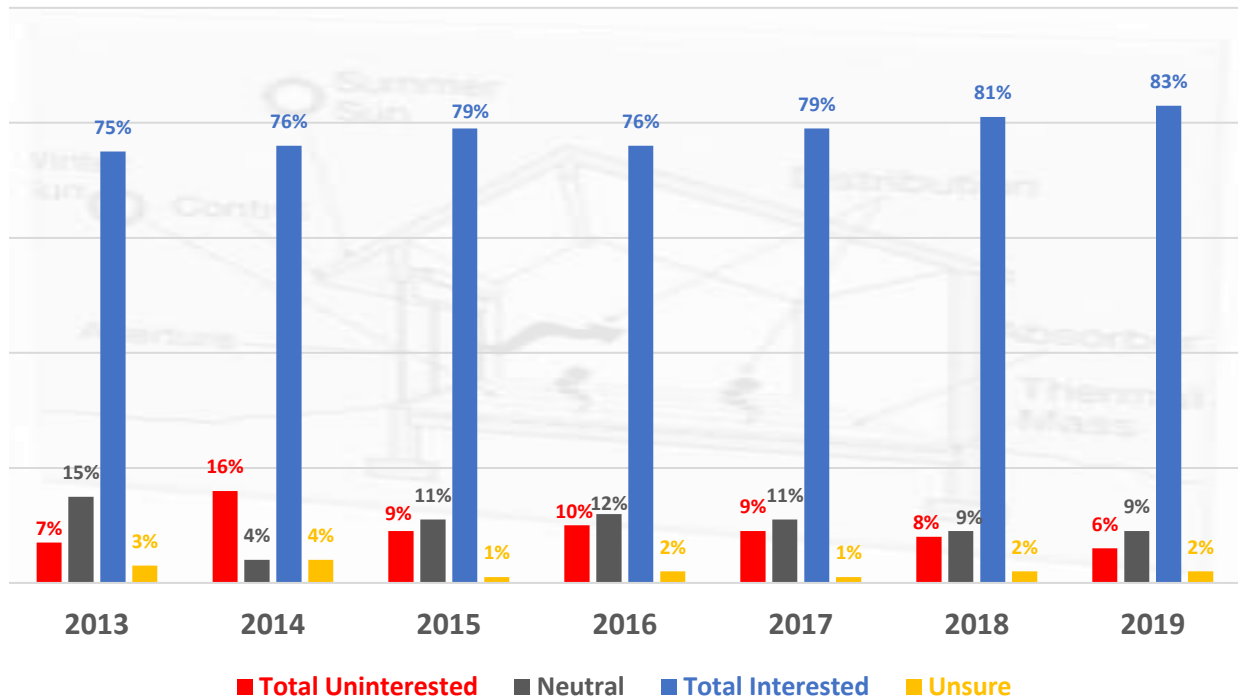


More than two-thirds or 68% provided a good or very good rating for the overall quality of the material, +1% over 2018. There was a slight increase in the satisfactory score (+2%) to 16%, while the negative mark remained constant and the do not know responses were up +1%.

Energy Efficiency

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

Q33. "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?"

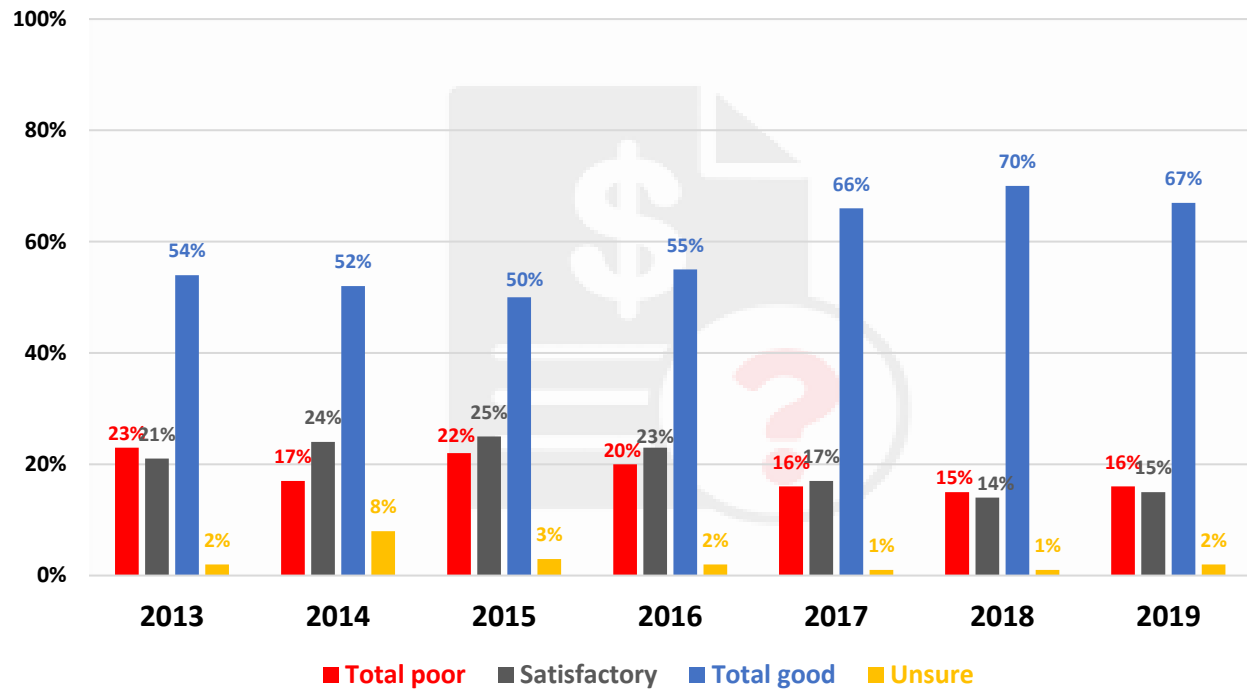


Demand is strong and has been increasing over the past three survey periods as 83% (+2% over 2018) are interested in GSH providing them information which could help their home save money by being more energy efficient.

Billing – Ease of Understanding

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

Q34. "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 was a small -3% decrease in the total good rating to 67% from the peak score of 70% recorded last year in 2018.

Improvement Comments

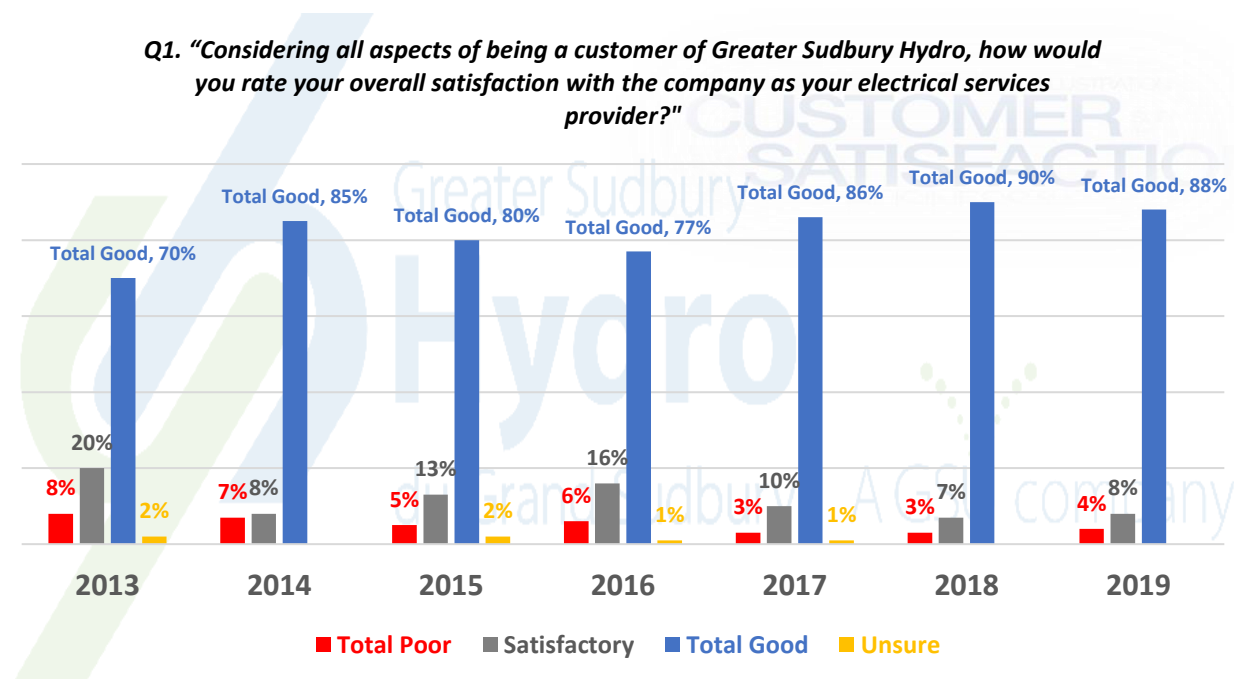
In a final open-ended or unaided question, all residential customers were probed about what they felt Greater Sudbury Hydro could do to better service its customers. Most responses as illustrated below, related to lowering or maintaining rates, outage response times/information, providing more information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

Q34. "What can Greater Sudbury Hydro do to better service its customers?"	
<i>Don't know</i>	37%
<i>Lower rates</i>	18%
<i>Maintain rates / no increases</i>	10%
<i>Incentives / programs for reducing electricity</i>	6%
<i>Fewer outages / quicker response to outages</i>	5%
<i>Explain cost of energy on bills</i>	5%
<i>More information on how to save / conserve energy</i>	4%
<i>Lower delivery fees</i>	4%
<i>Information on what is involved in the price of hydro</i>	4%
<i>Better communication</i>	2%
<i>Make bills easier to understand / clearer</i>	2%
<i>More information on alternative energy options</i>	1%
<i>More information / notice about power outages</i>	1%
<i>Lower costs / overhead / salaries</i>	1%
<i>Improve the website / make it more user friendly</i>	1%
<i>Improve customer service</i>	1%
<i>Better hours of operation</i>	<1%
<i>Use less paper with Bills</i>	<1%
<i>More consistent with tree removal</i>	<1%

EXECUTIVE SUMMARY – BUSINESS

Satisfaction

Businesses were first asked an overall satisfaction question. The following graph compares the December 2019 results with the previous six surveys. Result below combine the total poor (very poor & poor) and total good (good & very good) findings.

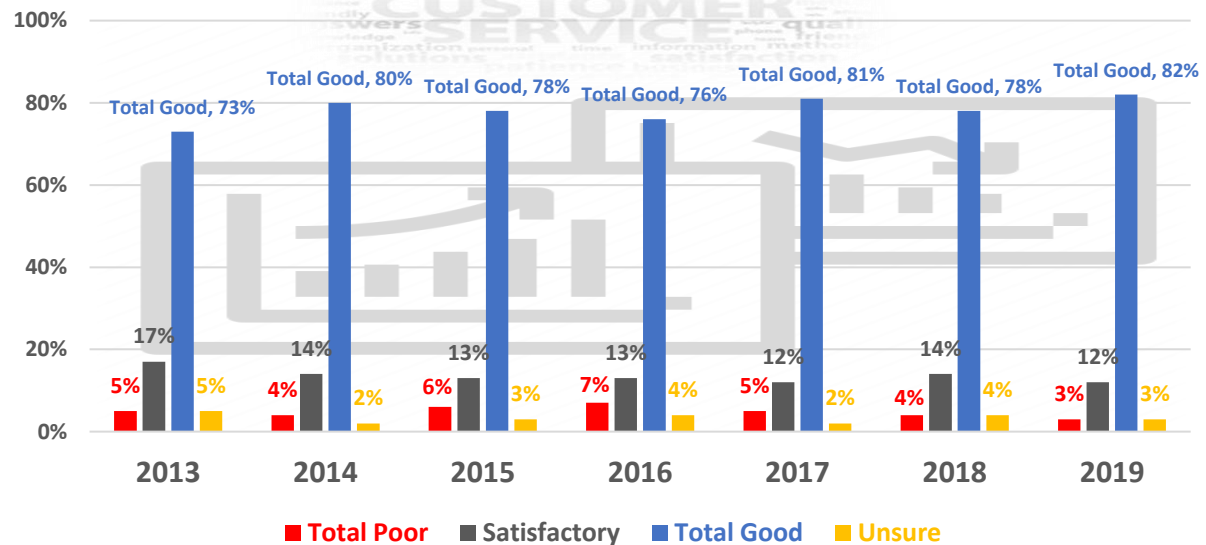


The overall satisfaction rating as represented by the combined good and very good responses has remained consistent over the past three years and is currently at 88%, down slightly -2% over 2018.

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?"




More than eight in ten or 82% of businesses provided a good or very good rating for GSH and its customer service in relation to other providers, a +4% improvement from the previous 2018 period. The negative score also dropped -1% as did the satisfactory (-1%) and do not know responses (-1%).

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	2019
	Review separate parts of combined statement	78%	68%	65%
	Only look at total	21%	30%	33%
	Don't know / not applicable	1%	2%	2%

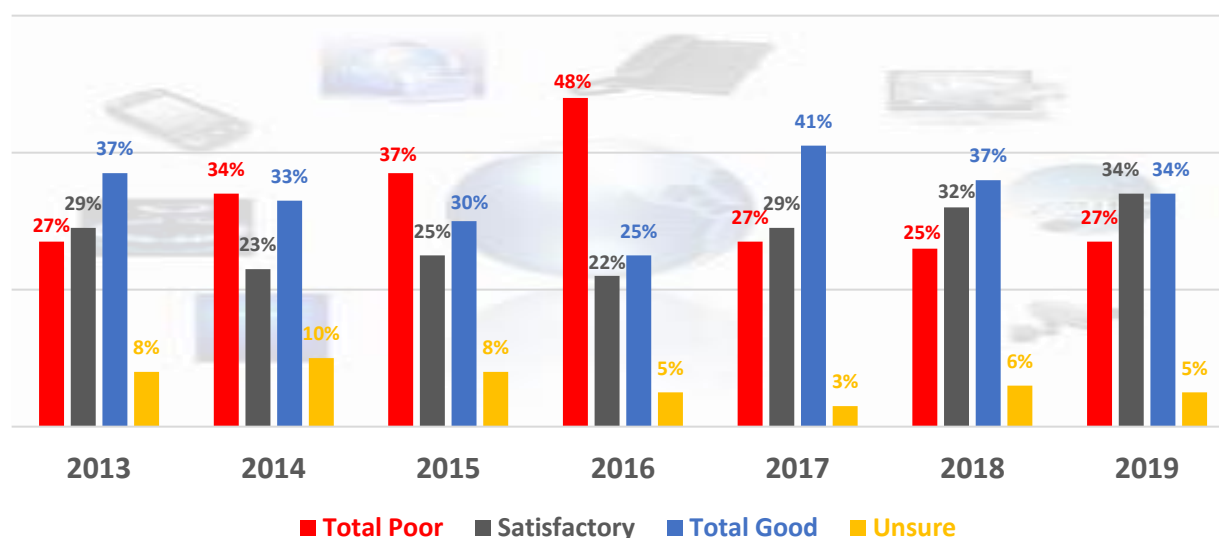
There was an increase in the percentage of business customers or 33% that said they only look at the total bill (+3% over 2018), however most or 65% (-3%) claimed to review separate parts of their combined statement, while 2% were unsure (unchanged).

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 asked comparing GSH to other essential services. Results below combine the total poor (very poor & poor) and total good (good & very good) findings.

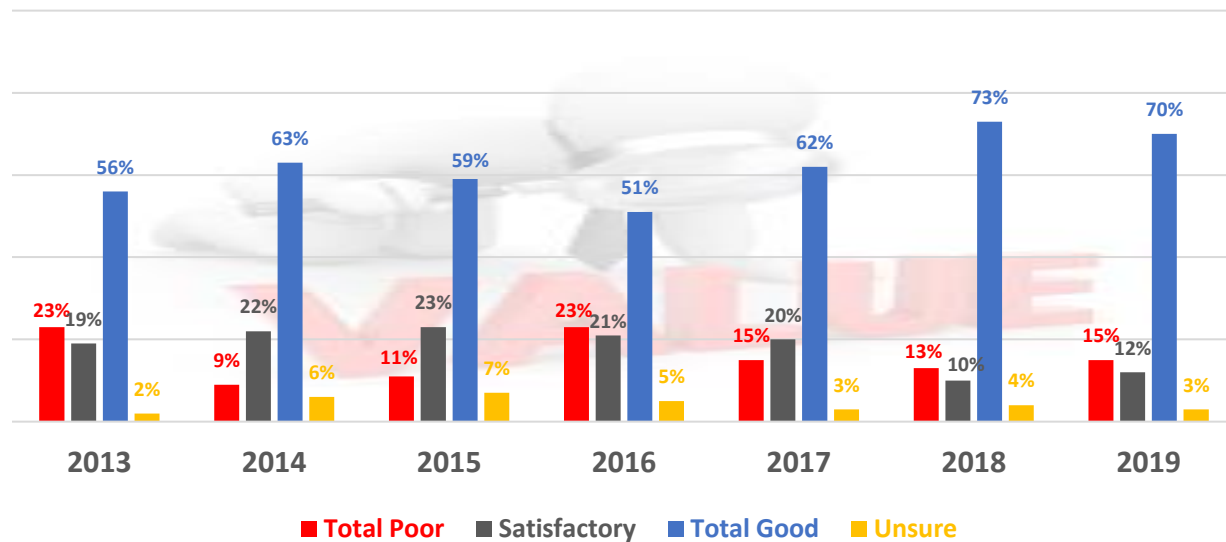
Q4. “How would you rate your satisfaction with the price you pay for electricity compared to what you pay for other (essential) business services?”



Satisfaction (good & very good ratings) with the comparative cost of electricity in relation to other essential services dropped by -3% over 2018. The negative score increased by +2%, as did the number of businesses that provided a satisfactory rating (+2%). There were 5% unsure or that did not know (-1%).

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 is at seven in ten, off -3% from the high mark established in 2018. Total poor and satisfactory numbers were consistent but up slightly (+2% for both) and the number of those unsure was down -1% to 3%.

Rating Greater Sudbury Hydro – Image Areas

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	2019
Q6. Greater Sudbury Hydro provides customers with reliable and good service.	69%	89%	85%	81%	84%	91%	90%
Q7. Greater Sudbury Hydro is committed to effectively managing a balanced budget.	25%	21%	21%	19%	17%	27%	23%
Q8. Greater Sudbury Hydro meets its commitment to customers.	69%	86%	83%	79%	85%	86%	80%
Q9. GSH provides its customers with information about programs to help reduce their energy costs.	65%	71%	69%	76%	73%	70%	65%
Q10. Greater Sudbury Hydro is concerned about public safety and safe work practices.	65%	58%	56%	64%	74%	72%	70%
Q11. Greater Sudbury Hydro encourages efficient use of electricity among its customers.	55%	75%	71%	80%	82%	75%	73%
Q12. Greater Sudbury Hydro invests in and gives back to the community.	38%	29%	25%	31%	43%	42%	44%

The highest rated category in terms of agreement was for Greater Sudbury Hydro providing good and reliable service at 90%, consistent but off slightly (-1%), next by meeting its commitment to customers at 80%, down -6% over 2018.

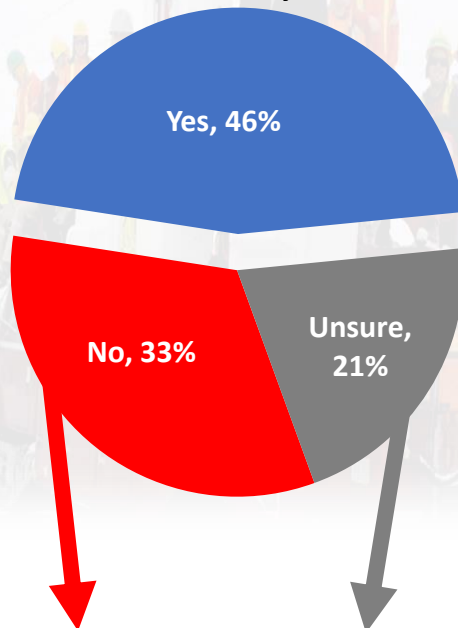
Total agreement was next best for encouraging the efficient use of electricity by 73% a -2% dip over 2018, followed by being concerned about public safety and safe work practises by 70% (-2%) and providing customers with information to help reduce energy costs by 65% (-5%).

Lowest scored were the areas of investing back in the community at 44% (+2% compared to 2018) and especially for being committed to effectively managing a balanced budget where 23% agreed (-4%).

There were a high number of businesses that answered do not know to questions about managing a balanced budget (58%), investing back in the community (34%) and to a lesser extent being concerned about public safety and safe work practises (20%).

Two new questions were asked in the 2019 survey period. The first probed customers if they thought GSH is doing enough to give back to the community. A follow-up was then asked to those respondents that answered no (33%, N=33) or unsure (21%, N=21) about the areas they would like to see GSH give back.

Q13. "Do you think Greater Sudbury Hydro does enough to invest in or give back to the community?"



Forty-six percent of businesses feel GSH does enough to invest or give back to the community, compared to only one-third that do not. There were 21% unsure.

The 54% (N=54) that said no or unsure were asked Q14.

Q14. "In what areas would you like to see GSH invest in or give back?"

Don't know	N=10	19%
Health care / hospital	N=8	15%
School programs / education	N=7	13%
Food Bank	N=6	11%
Homeless / shelters	N=6	11%
Help people reduce energy costs	N=5	9%
Community programs / sports / arts / culture	N=5	9%
Update lines / streetlights / underground wires	N=3	6%
Help low income families	N=2	4%
Lower the cost (for those in need)	N=1	2%
Addiction programs / help with opioid crisis	N=1	2%

Mentions varied and ranged from health care, education, helping the less fortunate (food banks, shelters) to community arts, culture or sports programs and support for low income families.

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	2019
Q15. The reliability of power supply	91%	90%	87%	89%	86%	92%	91%
Q16. Prompt responses to power outages when they occur	74%	73%	70%	72%	80%	82%	81%
Q17. Effectively scheduling planned power outages	61%	59%	55%	41%	58%	53%	55%
Q18. Effectively communicating with customers about planned power interruptions in your area	62%	53%	50%	40%	49%	45%	46%

Results for the four performance indicators have remained stable over 2018, with fluctuations with a $\pm 2\%$ range. Highest scored was once again the reliability of power at 91% and then prompt response time to outages. Results fall when it comes to effectively scheduling planned outages at 55% (35% answered unsure) and for effectively communicating with customers about planned outages at 46% – 40% answered 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.

Q19. "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	2019
1-lowest rates – regular outages	3%	4%	3%	3%	1%	1%	1%
2-low rates – occasional outages	6%	3%	5%	4%	2%	1%	1%
3-neutral – a balance between rates and outages	57%	58%	65%	69%	79%	75%	82%
4-high rates – only a few outages	12%	18%	14%	9%	7%	9%	8%
5-highest rates – no outages	9%	3%	2%	1%	2%	3%	2%
Don't know	13%	14%	11%	14%	9%	11%	6%

More than eight in ten or 82% of businesses want a balance between rates and outages, +7% higher than in 2018. Only 2% are willing to have lower prices at the cost of some form of outage, 10% would tolerate a higher rate for fewer or no interruptions and 6% did not know or were unsure.

Payment Options & Online Management

A series of new questions were asked about payments, the first of which probes about current methods for paying their business GSH bill. Options were read, and multiple responses were accepted.

Q20. "Which of the following methods do you currently use to pay your GSH bill?"

READ OPTIONS

58%	Online/telephone banking through your financial institution
32%	Equal monthly payment plan
27%	Automatic withdrawal from your bank account
11%	Online at Sudbury Hydro Website
5%	Payment at the Greater Sudbury Hydro office

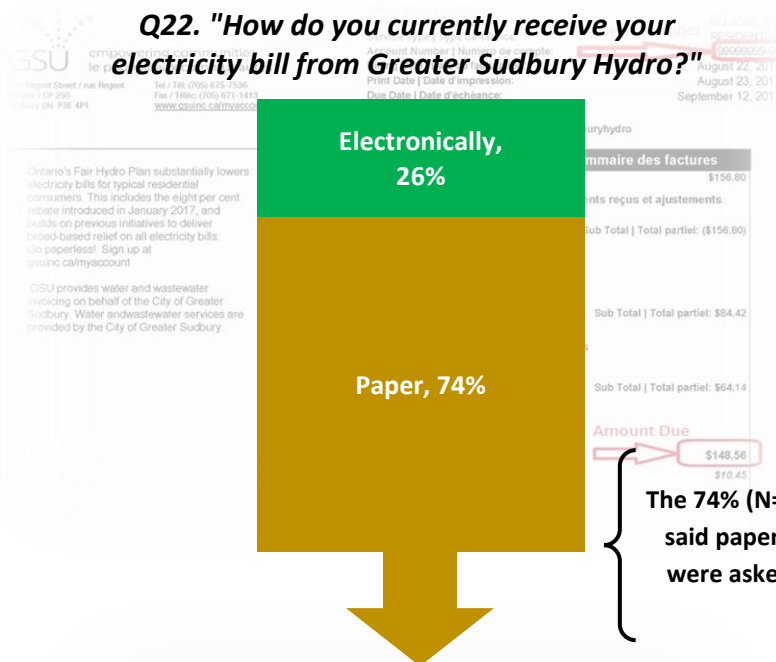
Online or telephone banking was most named by 58% as a method of payment, followed by automatic withdrawal at 27%, while only 11% pay through the GSH website and 5% at the office. There are 32% that claim they are on an equal monthly plan in addition to paying through one of the aforementioned methods.

They were next asked about their preferred method of business GSH bill payment asking the same options. One response was accepted.

Q21. "What would be your preferred method of payment?"		
	Online/telephone banking through your financial institution	52%
	Equal monthly payment plan	21%
	Automatic withdrawal from your bank account	16%
	Payment at the Greater Sudbury Hydro office	2%
	Online at Sudbury Hydro Website	4%
	Unsure	2%

Online banking was once again most named by 52%, followed by automatic withdrawal at 16%, while only 2% cited the office and 4% the website. Twenty-one percent referenced equal monthly billing.

Businesses were then asked how they receive their bill from Greater Sudbury Hydro. Respondents that said paper (74%, N=74) were then asked an open-ended or unaided follow-up about what would get them to move to paperless billing.



Twenty-six percent of businesses said they get a bill electronically, while the majority or 74% continue to receive a paper statement.

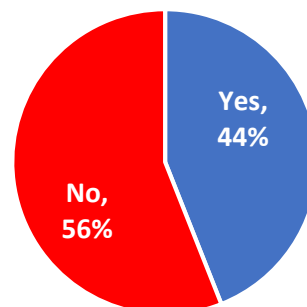
Q23. "What would most convince you to move to electronic or paperless billing?"

<i>If it would be easier / more convenient</i>	19%
<i>It would use less paper</i>	16%
<i>Nothing no interest</i>	14%
<i>If there was online security</i>	12%
<i>Don't know</i>	9%
<i>If I could receive bill quicker / on time</i>	7%
<i>I plan to, just haven't done it yet</i>	7%
<i>Need hard copies / paper record</i>	5%
<i>If it would have more information in it (details)</i>	3%
<i>If easy to access (current / past bills)</i>	3%
<i>If a discount / lower price was offered</i>	3%
<i>Offer the option / let customers know of option</i>	1%
<i>Nothing I prefer a hard copy</i>	1%

Convenience, quicker access and using less paper were most named, while there were some that want to be assured of security, the ability to access past bills as well as have a record of them.

All N=100 business customers were then asked if they manage their GSH account online of which 44% said they yes.

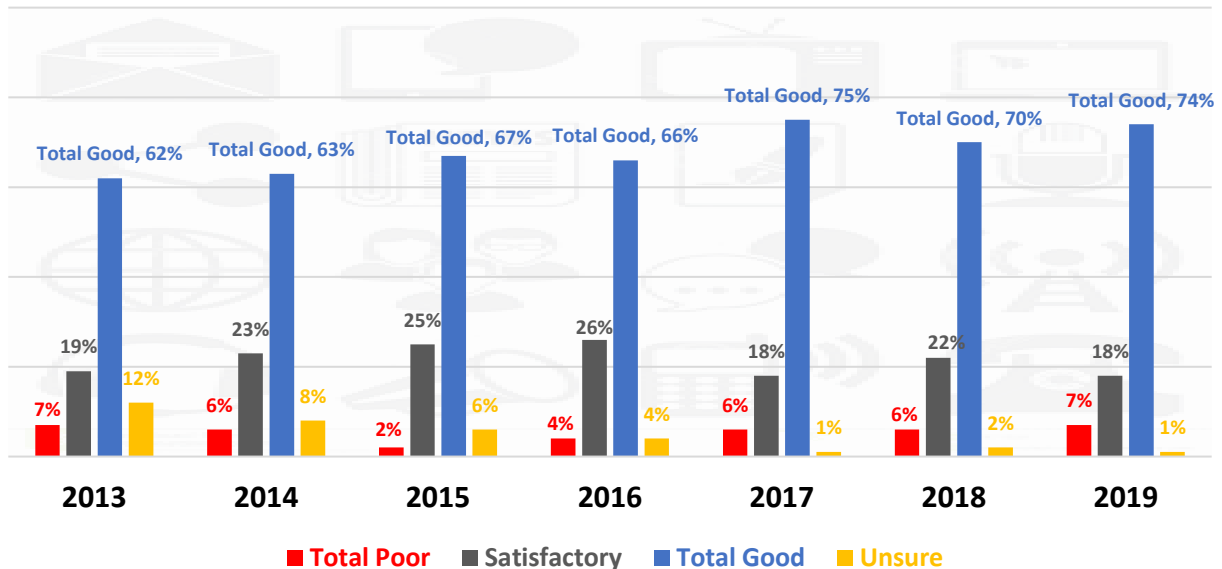
Q24. "Do You currently manage your GSH account Online?"



Communication

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

Q25. "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."



Seventy-four percent of businesses rated communications as being good or very good, an increase of +4% from 2018.

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

Q26. "What is your preferred method to have Greater Sudbury Hydro communicate information to you?"

<i>E-mail from the company</i>	<i>57%</i>
<i>Bill inserts / attachments to e-bill</i>	<i>14%</i>
<i>Social media, such as Facebook or Twitter</i>	<i>12%</i>
<i>Direct mail</i>	<i>10%</i>
<i>Greater Sudbury Hydro Website</i>	<i>6%</i>
<i>Newspaper advertising</i>	<i>1%</i>

Email is the preferred method by which most or 57% want to have the utility communicate with them, while the remaining responses were spread among bill inserts (14%), social media (12%), mailings (10%) and through the GSH website (6%).

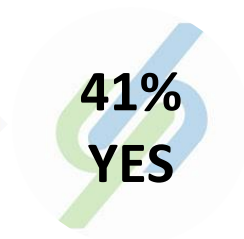
In another open or unaided question, business customers were asked about how they would most like to communicate with Greater Sudbury Hydro.

Q27. "And as a customer, what is your preferred method that you would like to communicate with Greater Sudbury Hydro?"

<i>Email</i>	<i>50%</i>
<i>Telephone</i>	<i>44%</i>
<i>Social media</i>	<i>4%</i>
<i>Link or form on GSH Website</i>	<i>1%</i>
<i>Don't know/no preference</i>	<i>1%</i>

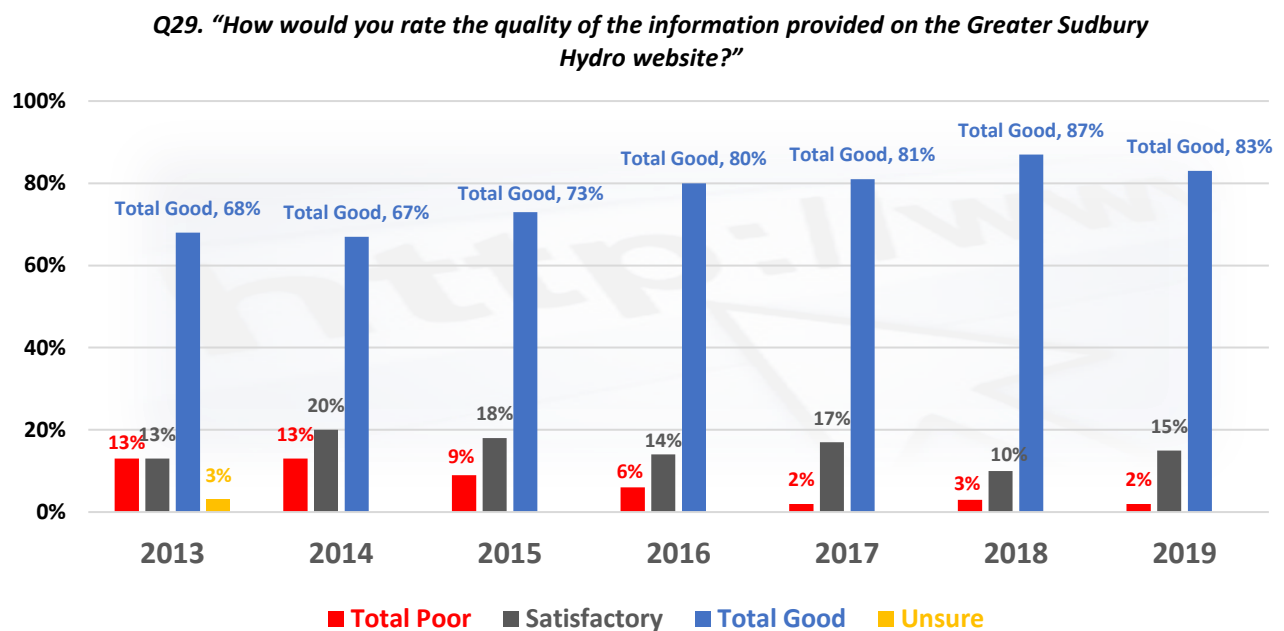
Email is the preferred method by half of businesses surveyed, while a telephone call is a close second at 44%.

Website



A total of 41% (N=41) of businesses, compared to 38% in 2018, said they have visited the GSH website over the past 12 months .

The 41% (N=41) that visited the site were then asked three follow up questions on the information that the website contains.



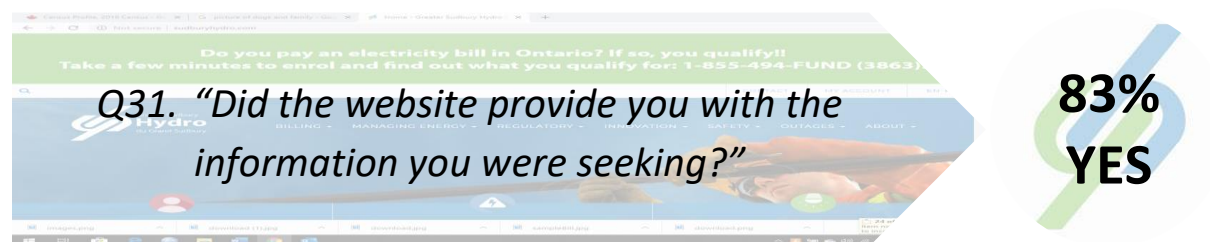
Satisfaction with the quality of information on the website is high at 83%, although -5 lower in relation to 2018.

The N=41 website visitors were then asked about the information they were looking for. Multiple responses were accepted and are illustrated below.

Q30. "What information did you look for?"	
<i>Account information</i>	30%
<i>Rates & Fees</i>	26%
<i>Energy conservation</i>	24%
<i>News or Developments</i>	6%
<i>Outages</i>	6%
<i>Corporate info</i>	4%
<i>Contact information</i>	2%
<i>Report an issue</i>	2%

Most named was accessing account information, getting updates on rates or fees and to find out about energy conservation initiatives.

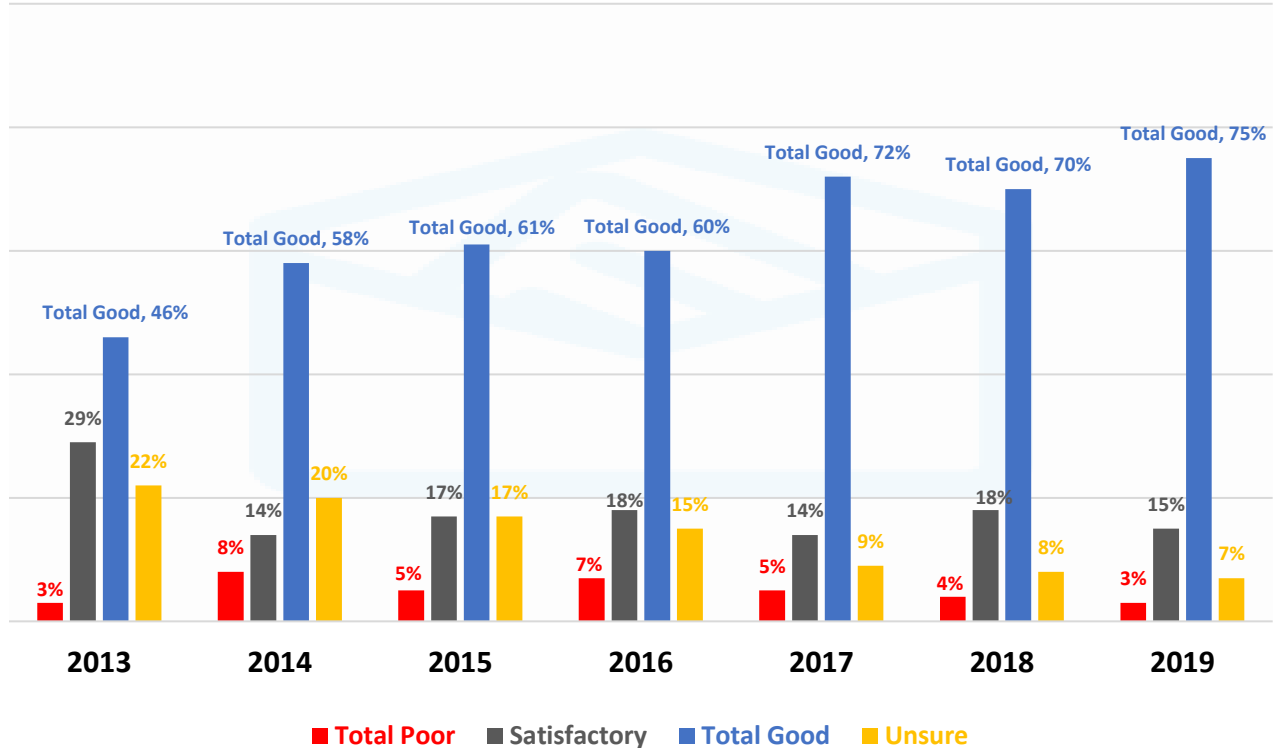
The N=41 website visitors were then asked if they found the information on the website they were looking for. Eighty-three percent said yes, they found the information, compared to 82% in 2018.



Rating Bill Inserts & Links

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

Q32. "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 the bill inserts and other printed material you have recieved from GSH?"

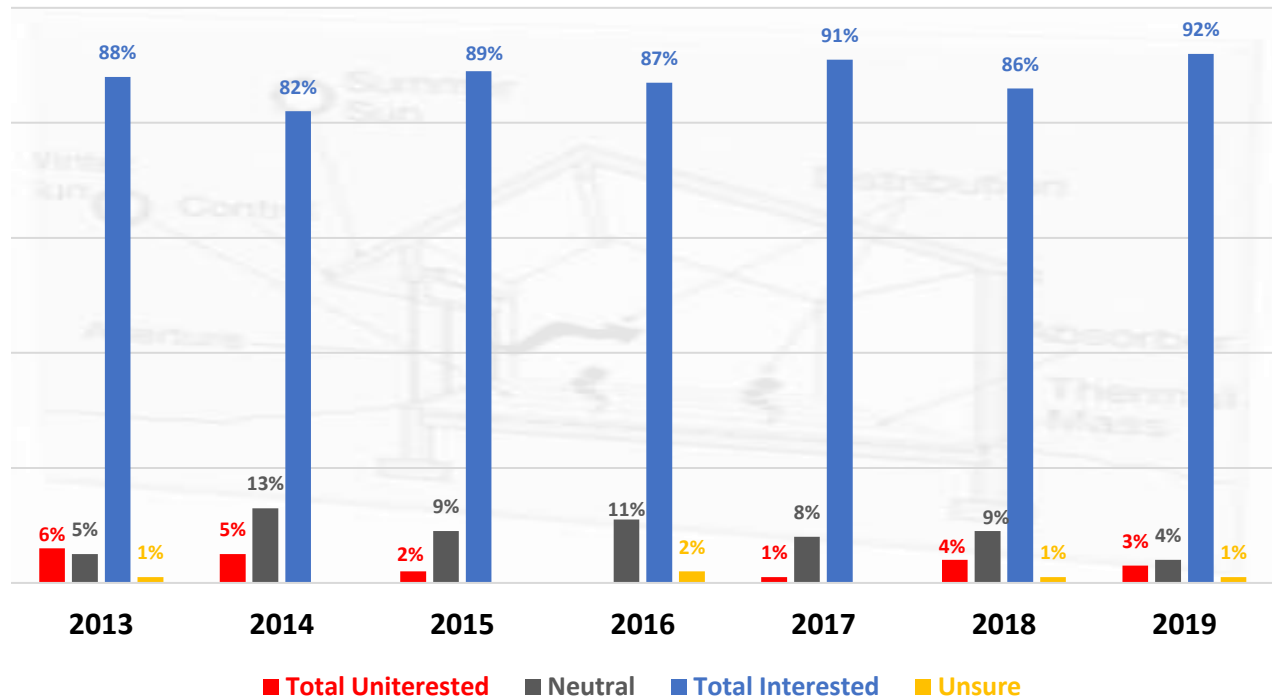


The good and very good rating provided for bill inserts or electronic bill links is 75%, +5r% higher than in 2018 and the highest recorded since baseline data has been collected.

Energy Efficiency

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

Q33. "Using a scale from one not at all interested to five very interested, how interested would you be in having Greater Sudbury Hydro provide information which could help your business save money by being more energy efficient?"

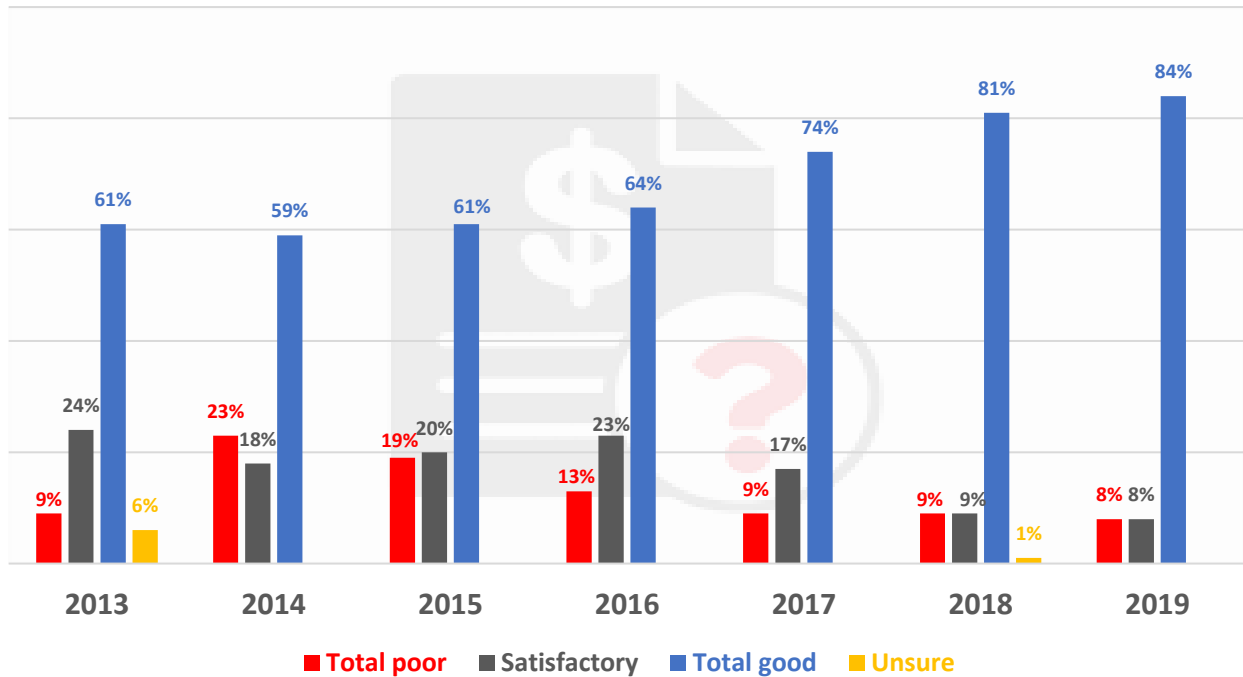


Consumer interest among businesses in obtaining energy efficiency information remains very strong at 92%.

Billing – Ease of Understanding

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

Q34. “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 strong majority of business customers continue to find it easy to read and understand their bills, as evidenced by an 84% positive score in this area.

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.

Q35. "What can Greater Sudbury Hydro do to better service its customers?"	
<i>Maintain rates / no increases</i>	35%
<i>Don't know</i>	33%
<i>Lower rates</i>	11%
<i>Information on what is involved in the price of hydro</i>	8%
<i>Be easier to reach</i>	3%
<i>Make bills easier to understand / more clearer</i>	2%
<i>More information on how to save / conserve energy</i>	2%
<i>Better hours of operation</i>	1%
<i>Better communication</i>	1%
<i>No interruptions / outages</i>	1%
<i>Improve the website / make it more user friendly</i>	1%
<i>Incentives / programs for reducing electricity</i>	1%
<i>Fewer outages / quicker response to outages</i>	1%

While more than 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.