



Annual Customer Satisfaction Survey Report



December 2020

TABLE OF CONTENTS

METHODOLOGY & LOGISTICS	2
EXECUTIVE SUMMARY – RESIDENTIAL	4
Satisfaction	4
Comparative Customer Service	5
Price & Value	6
Greater Sudbury Hydro Image Areas	9
Rating Performance	10
Rates vs Outages	11
Payment Options & Online Management	12
Covid-19 & Customer Service	14
Communication	15
GSH Website	17
Rating Bill Inserts & Links	19
Billing – Ease of Understanding	20
Improvement Comments	21
Electric Vehicles	22
EXECUTIVE SUMMARY – BUSINESS	23
Satisfaction	23
Comparative Customer Service	24
Price & Value	25
Greater Sudbury Hydro Image Areas	28
Rating Performance	29
Rates vs Outages	30
Payment Options & Online Management	31
Covid-19 & Customer Service	33
Communication	34
GSH Website	36
Rating Bill Inserts & Links	38
Billing – Ease of Understanding	39
Improvement Comments	40
RESIDENTIAL RESULTS BY QUESTION	41
BUSINESS RESULTS BY QUESTION	54

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 2020 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 2020 period. In each of these eight (N=8) 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 2020 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 as well as a results by individual question section.

Study Sample

Greater Sudbury Hydro provided Oraclepoll with a database of their residential and business customers to be interviewed. Numbers were randomly selected and a total of N=500 customers in total were polled by telephone.

Residential	N=400
Business	N=100

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. Bi-lingual interviewers were employed, and surveys were conducted in English or French depending on the preference of the respondent.

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.

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 27th to December 6th, 2020.

Confidence

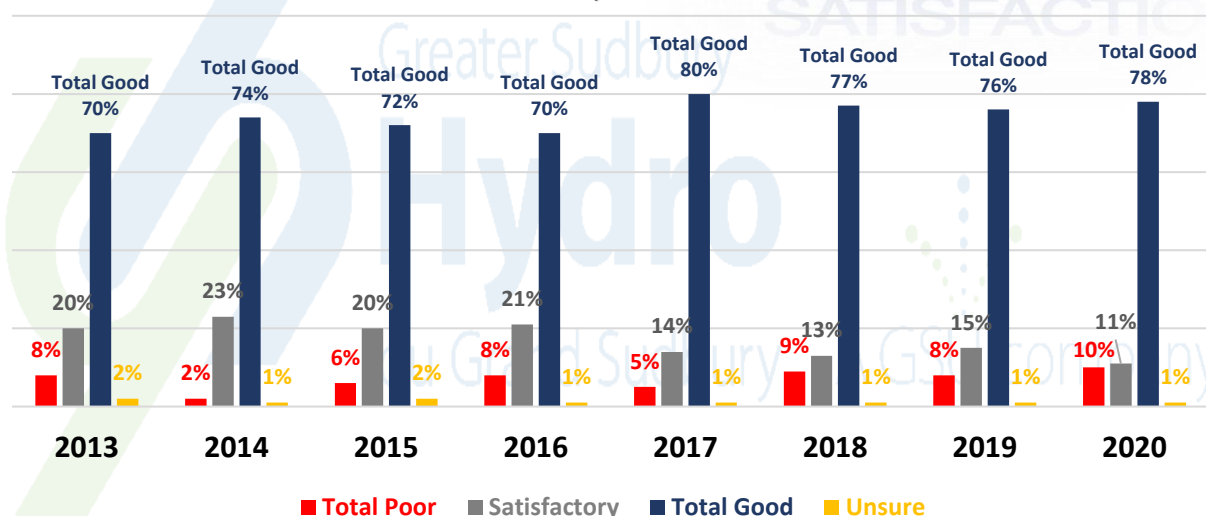
The margin of error for the N=400-person residential survey is $\pm 4.9\%$, $\frac{19}{20}$ times and $\pm 9.8\%$, $\frac{19}{20}$ times for the sample of N=100 businesses.

EXECUTIVE SUMMARY – RESIDENTIAL

Satisfaction

Residential customers were first asked an overall satisfaction question. The following graph compares the December 2020 results with the previous seven 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?"



	Total Poor	Satisf.	Total Good	Unsure
Male	11%	14%	74%	2%
Female	9%	9%	81%	<1%

	Total Poor	Satisf.	Total Good	Unsure
18-34	15%	17%	68%	-
35-44	8%	9%	81%	1%
45-54	11%	7%	82%	-
55-64	7%	9%	82%	1%
65+	4%	11%	83%	1%

	Total Poor	Satisf.	Total Good	Unsure
Under \$50,000	16%	10%	73%	1%
\$50,000 - \$74,999	9%	13%	78%	1%
\$75,000 - \$99,999	7%	5%	87%	1%
\$100,000 or more	3%	15%	80%	2%

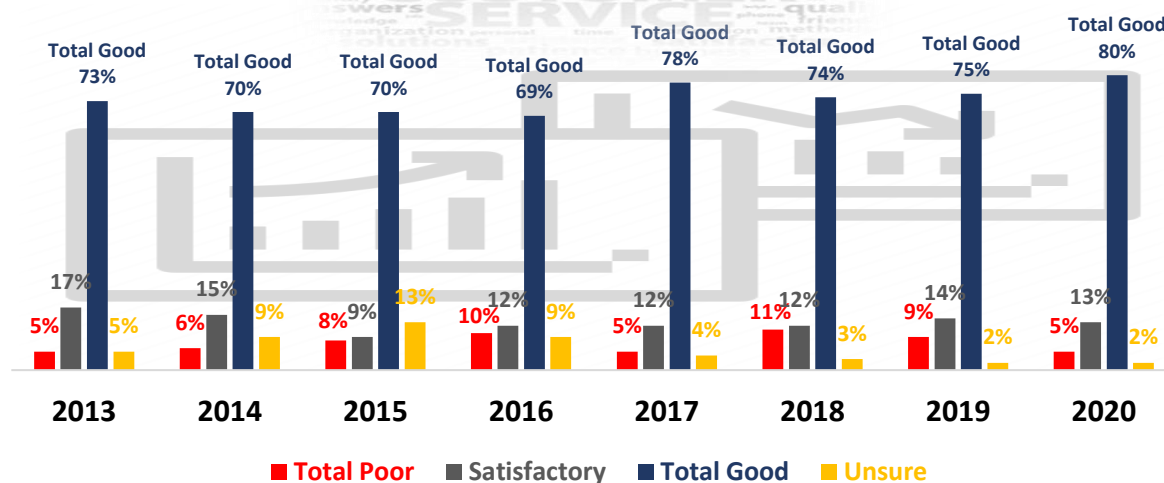
The total good (37%) and very good (41%) rating stands at 78%, up +2% from 2019, while 11% gave a "3" satisfactory score (-4%). The poor (3%) and very poor (7%) mark remains low at 10%, but it increased +2% over the previous survey period.

Females were more likely to respond good or very good in relation to males. The youngest 18-34 and with the lowest household incomes of under \$50,000 per annum were also less satisfied and had higher negative responses of poor or very poor.

Comparative 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?"



	Total Poor	Satisf.	Total Good	Unsure
Male	6%	14%	77%	3%
Female	6%	11%	82%	1%

	Total Poor	Satisf.	Total Good	Unsure
18-34	9%	14%	76%	1%
35-44	5%	13%	77%	5%
45-54	2%	9%	85%	4%
55-64	5%	13%	81%	1%
65+	5%	10%	84%	1%

	Total Poor	Satisf.	Total Good	Unsure
Under \$50,000	11%	17%	70%	3%
\$50,000 - \$74,999	4%	4%	90%	2%
\$75,000 - \$99,999	-	8%	92%	-
\$100,000 or more	3%	5%	90%	2%

More customers during the survey period covering the Covid-19 pandemic view the customer service of Greater Sudbury Hydro more favourably in relation to other providers. Eight in ten gave a good (43%) or very good (37%) rating, up +5% compared to 2019 and the highest to date.

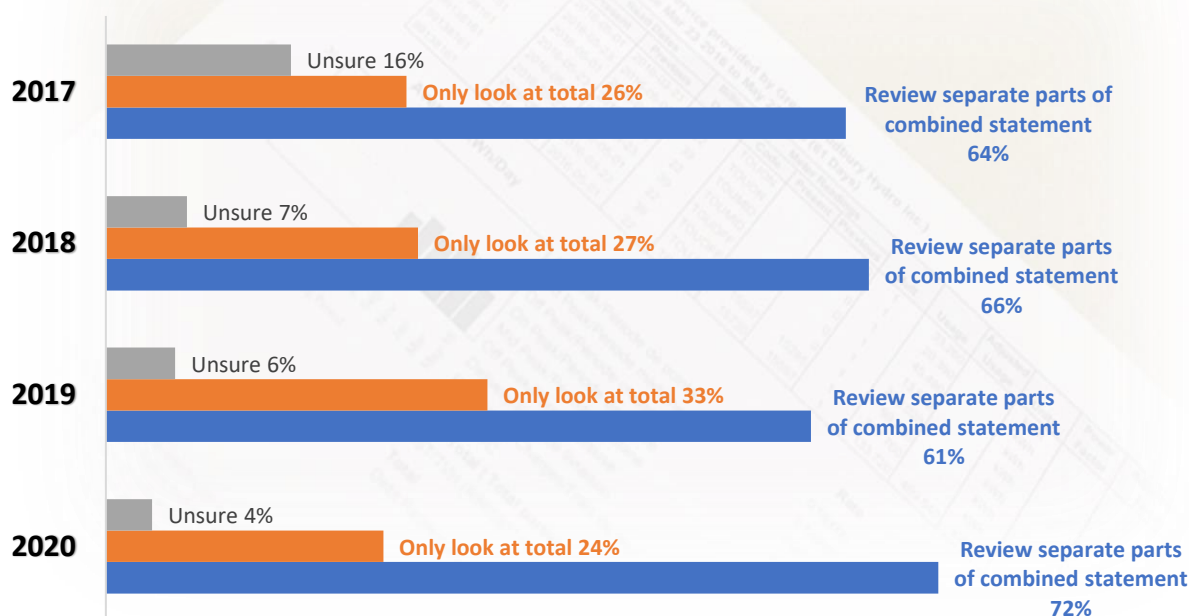
Females, older customers in age cohorts 45 or older and earner making \$50,000 or more were most satisfied. The lowest earners in the under \$50,000 range had the lowest combined response of good or very good.

Price & Value

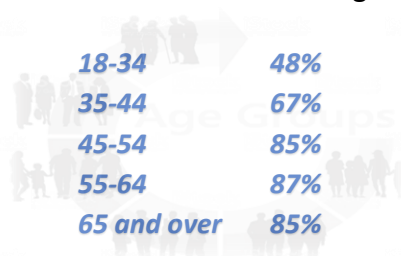
Respondents were probed about their monthly bill. They were first read a short statement describing their combined utility bill after which they were asked how closely they look at their statement.

"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?"



The 2020 survey period resulted in more customers reviewing the separate parts of their bill. More than seven in ten or 72% said they reviewed separate parts of the bill an +11% increase compared to 2019. Results reveal that interest in reviewing their bill in detail is driven by age.

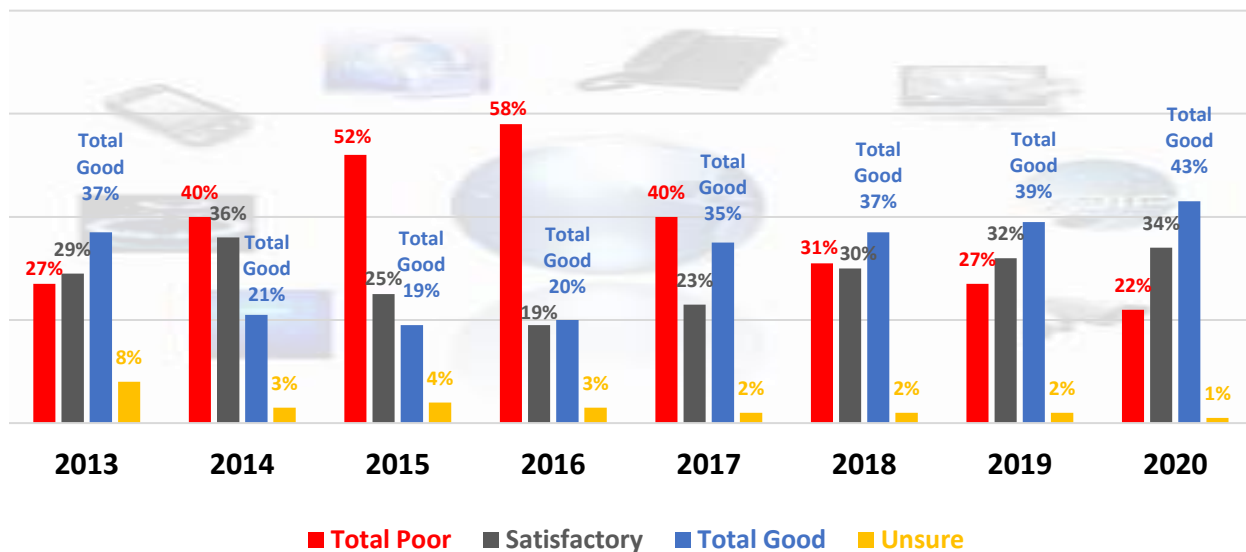


The following short statement was read to respondents and then they were asked questions related to the cost they pay for electricity.

“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)?”

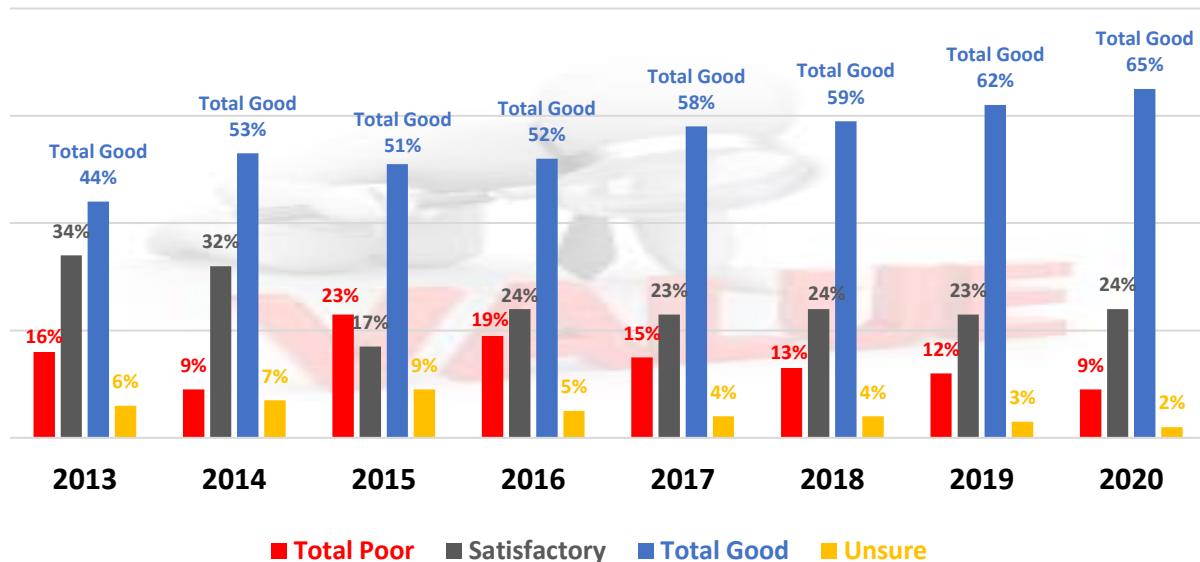


Forty-three percent gave a good or very good score, up +4% over 2019, the fourth increase in a row and the highest rating recorded. The number of satisfactory responses also increased +2% to 34% over the previous survey and -5% fewer rated their satisfaction as poor or very poor. Total good responses as evidenced below, can be seen as primarily being a function of combined household income.

Under \$50,000	37%
\$50,000 - \$74,999	36%
\$75,000 - \$99,999	46%
\$100,000 or more	62%

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 (good & very good) rating has improved once again in this survey period by +3% to 65%, the fourth consecutive gain. This positive gain corresponded with drops in the total poor and unsure categories. Once again, variances in positive results are most significant by household income.

Under \$50,000	54%
\$50,000 - \$74,999	55%
\$75,000 - \$99,999	70%
\$100,000 or more	89%

Greater Sudbury Hydro Image Areas

Respondents were then asked to rate their level of agreement with a series of statements about the image of 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	2020	
Q6. Greater Sudbury Hydro provides customers with reliable and good service.	77%	75%	73%	72%	79%	82%	82%	84%	↑
Q7. Greater Sudbury Hydro is committed to effectively managing a balanced budget.	25%	33%	32%	29%	30%	40%	37%	32%	↓
Q8. Greater Sudbury Hydro meets its commitment to customers.	80%	76%	75%	73%	78%	79%	81%	83%	↑
Q9. GSH provides its customers with information about programs to help reduce their energy costs.	58%	71%	61%	59%	65%	72%	68%	63%	↓
Q10. Greater Sudbury Hydro is concerned about public safety and safe work practices.	48%	63%	54%	60%	62%	63%	62%	60%	↓
Q11. Greater Sudbury Hydro encourages efficient use of electricity among its customers.	62%	72%	74%	71%	75%	80%	74%	67%	↓

GSH rated highest in terms of total agreement for providing customers with good service at 84% an increase of +2% over 2019, very closely followed by meeting its commitment to customers at 83%, also improving by +2%; but the remaining areas saw ratings decreases.

The two indicators related to energy efficiency, including encouraging the efficient use of electricity (67%) and providing information about programs to reduce costs (63%) followed, with results for both dropping -7% and -5% respectively.

Concern about public safety and safe work practises rated lower at 60%, down -2%, with a significant 29% being unsure or answering do not know. The question on being committed to effectively managing a balanced budget had the fewest respondents giving an agree or strongly agree response at 32% (-4%), while more than four in ten or 43% did not know or were uncertain.

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	2020	
Q12. The reliability of power supply	83%	92%	90%	88%	89%	82%	85%	88%	↑
Q13. Prompt responses to power outages when they occur	72%	82%	81%	84%	86%	80%	78%	80%	↑
Q14. Effectively scheduling planned power outages	57%	54%	66%	64%	70%	68%	65%	63%	↓
Q15. Effectively communicating with customers about planned power interruptions in your area	55%	56%	68%	66%	63%	61%	60%	54%	↓

The highest rated performance indicator remains the one related to the reliability of the power supply at 88%, an increase of +3% over 2018. Next best scored was the area of promptly responding to outages at 80% – similar but slightly higher compared to the previous wave by +2%.

Lower rated by 63% was for effectively scheduling planned power outages -2% lower than 2019 (25% were unsure) and especially for effectively communicating with customers about planned power interruptions in their area by 54%, a -6% drop, with a high 31% saying they did not know or were unsure.

Rates Versus Outages

A trade-off 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.

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

RATES VERSUS OUTAGES TRADE OFF	2013	2014	2015	2016	2017	2018	2019	2020
1-lowest rates – regular outages	2%	4%	4%	3%	2%	1%	2%	4%
2-low rates – occasional outages	15%	3%	8%	7%	5%	6%	10%	11%
3-neutral – a balance between rates and outages	44%	55%	47%	54%	59%	61%	58%	62%
4-high rates – only a few outages	15%	13%	11%	12%	11%	13%	12%	8%
5-highest rates – no outages	3%	5%	6%	5%	8%	7%	4%	6%
Don't know	22%	21%	24%	19%	15%	12%	14%	9%

More customers now want a balance between rates and outages at 62%, +4% higher compared to 2019). There was an increase in the number of customers willing to tolerate some form of outages (1 & 2 combined) for lower rates (15% or +4%) in relation to 2018 with 11% saying low rates with occasional outages (+1%) and 4% the lowest rates and regular outages (+2%). On the other hand, -2% fewer or 14% want diminished outages for some form of higher rates (4 & 5 combined) as 8% said high rates and no outages (-4%) and 6% the highest rates and no outages (+2%). The number of undecided's also fell -5% to 9%.

Payment Options & Online Management

Customers were asked about their bill payments, with the first question probing about current methods for paying their GSH bill. Options were read, and multiple responses were accepted.

Q17. "Which of the following methods do you currently use to pay your GSH bill?"

READ OPTIONS

70% Online/telephone banking through your financial institution (+6%)

38% Equal monthly payment plan (+1%)

33% Automatic withdrawal from your bank account (+1%)

7% Online at Sudbury Hydro Website (-1%)

1% Payment at the Greater Sudbury Hydro Office (-2%)

Online or telephone banking is the most used payment method and the percentage of those using it has increased by +6% over last year. Equal payments and automatic withdrawals followed with consistent findings, while lesser used was payment through the GSU website. The number of those citing payment at the Office declined and is now at a minimal 1%.

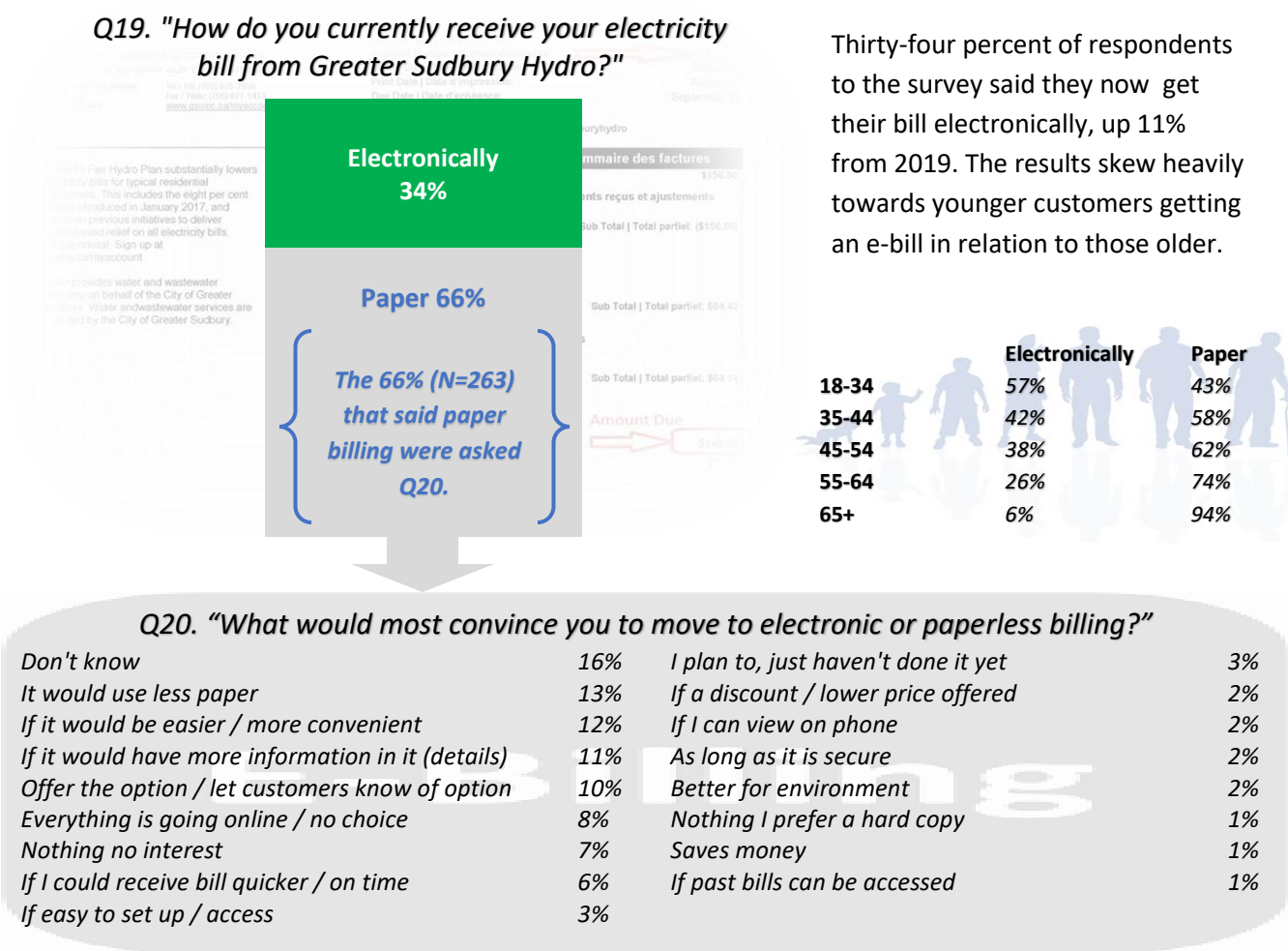
They were next asked about their preferred method of payment asking the same options. One response was accepted.

Q18. "What would be your preferred method of payment?"

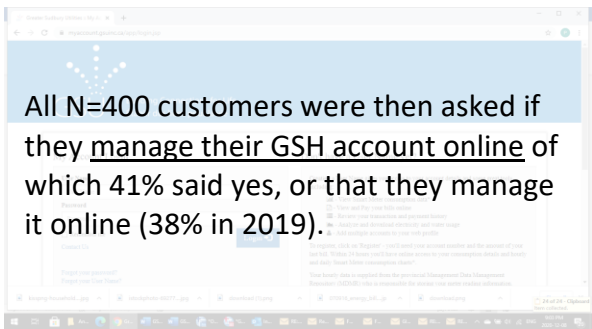
	Online/telephone banking through your financial institution	67% (+3%)
	Automatic withdrawal from your bank account	21% (-1%)
	Equal monthly payment plan	10% (+1%)
	Payment at the Greater Sudbury Hydro office	1% (-2%)
	Online at Sudbury Hydro Website	1% (-2%)

Online banking is also the preferred method of paying by two-thirds and +3% more named it in this survey. Automatic withdrawal and equal monthly payments rounded out the top three, while few and less than in 2019 stated payment at the Office or through the GSU website.

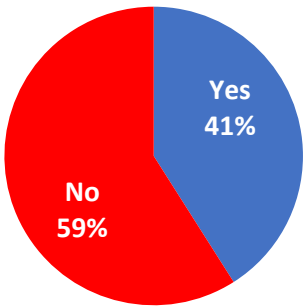
Customers were then asked how they receive their bill from Greater Sudbury Hydro. Respondents that said paper (66%, N=263) were then asked an open-ended or unaided follow-up about what would get them to move to paperless billing.



Only 8% expressed unwillingness to consider paperless billing (no interest, nothing), while 16% were unsure. The responses from others varied and included using less paper which would be eco-friendly, convenience and the realization that things are now moving online. There are others who want more information and a confirmation that the process will be easy, secure and all information will be included.



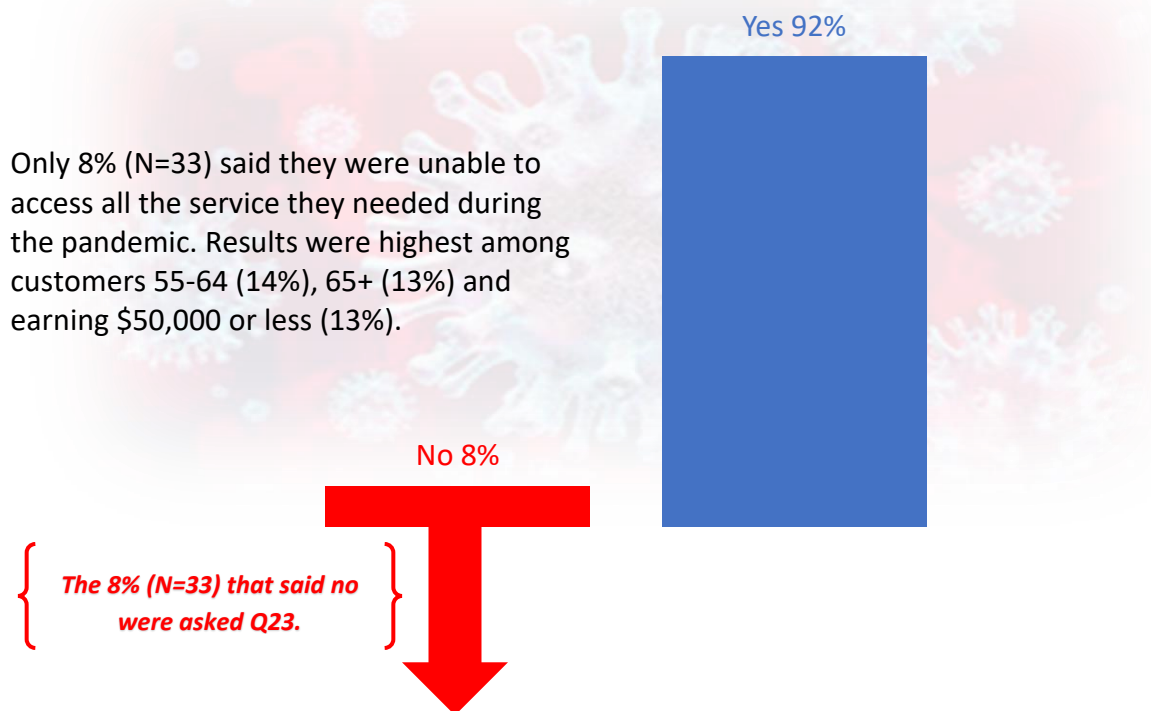
Q21. "Do You currently manage your GSH account Online?"



Covid-19 & Service

Two new questions about accessing services from Greater Sudbury Hydro during the Covid-19 pandemic were asked. The first probed if customers were able to access all the services they needed, and if they answered no, an open-ended question asking for details followed.

Q22. "Have you been able to access all the services you need from Greater Sudbury Hydro during the COVID pandemic?"



Only 8% (N=33) said they were unable to access all the service they needed during the pandemic. Results were highest among customers 55-64 (14%), 65+ (13%) and earning \$50,000 or less (13%).

Q23. "What services have you not been able to access?"

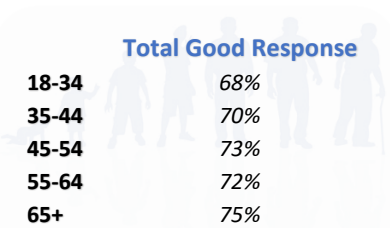
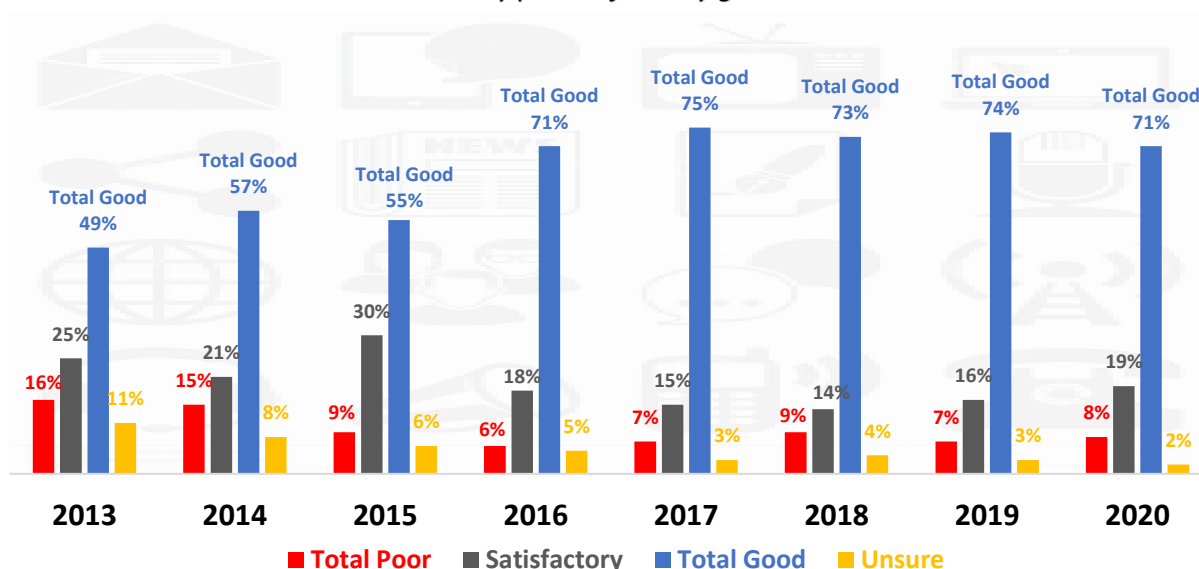
Billing inquiries	N=11	33%
Assistance with relief programs	N=5	15%
Payment deferrals	N=5	15%
Payments at office	N=4	12%
Waits / on hold too long	N=4	12%
Outage information / update	N=3	9%
Streetlight out	N=1	3%

Most claiming difficulties had issues getting to customer service for billing issues as well as seeking payment relief or deferrals and information regarding subsidies or programs available.

Communication

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

Q24. "Greater Sudbury Hydro communicates to its customers through a variety of methods including bill inserts, direct mail, social media, its website, newspapers and radio. Please rate the performance of Greater Sudbury Hydro in communicating with its customers using a scale from one very poor to five very good."



There was a -3% drop in the positive (good & very good) rating for communicating with customers in relation to 2019, with 71% providing a total positive score. There were also slight increases for the negative and satisfactory numbers.

Older customers and females provided higher total satisfied ratings. The mid-income cohort of \$75,000-\$99,999 had the lowest good results compared to other income ranges.

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

Q25. “What is your preferred method to have Greater Sudbury Hydro communicate information to you?”

E-mail from the company	32%	-1%
Social media, such as Facebook or Twitter	28%	+10%
Bill inserts	15%	-5%
Direct mail	10%	-5%
Greater Sudbury Hydro Website	6%	+2%
Don't know/no preference	4%	n/c
Texts / Phone app	3%	+3%
Newspaper advertising	1%	n/c
Radio	1%	n/c
Telephone	<1%	-<1%
Customer newsletter	<1%	+<1%

While email is still the top mention, it dipped slightly and Social Media after seeing a large gain is now almost tied for being the preferred method. Bill inserts and direct mail followed, but with decreasing numbers, then by the GSH website. While there is the ongoing shift where a segment of all age groups now reference Social Media and email, traditional methods such as direct mail (28%) and inserts (34%) are primarily still favoured by the oldest 65+.

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

Q26. “And as a customer, what is your preferred method that you would like to communicate with Greater Sudbury Hydro?”

Email	44%	+20%
Telephone	33%	-23%
Social media	15%	+3%
Texts	4%	+4%
Link / form on Greater Sudbury Hydro Website	2%	n/c
Don't know/no preference	2%	n/c
In person at office	1%	-3%
Regular mail	<1%	-<1%

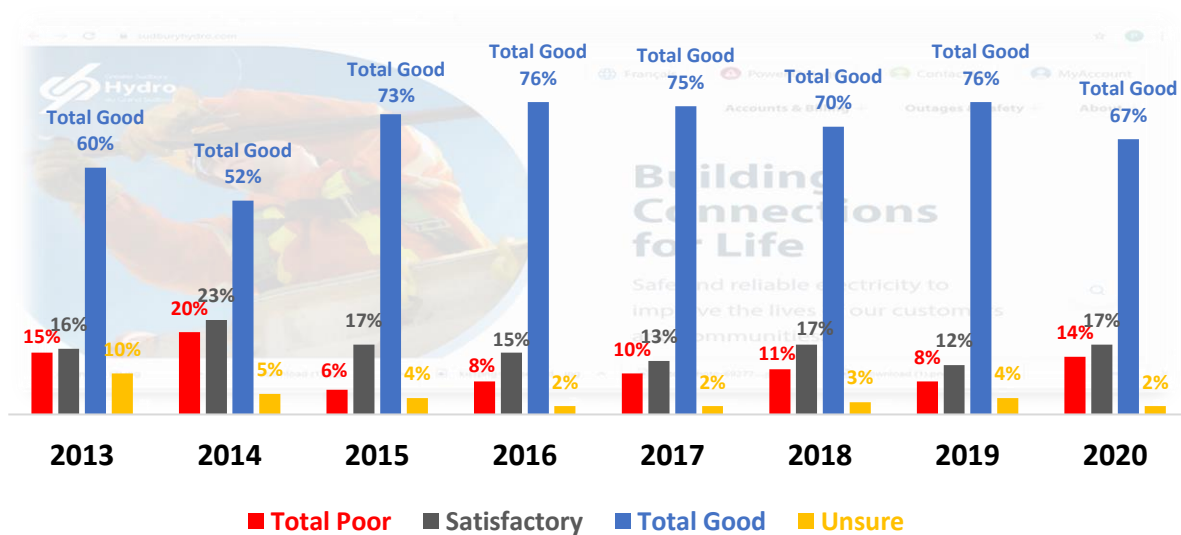
The Covid-19 survey period has seen a significant shift in the way that customers want to communicate with Greater Sudbury Hydro. Most (65%) now want to connect electronically using email, a +20% increase, Social Media, up +3%, texts (+4%) and a link on the website compared to more traditional methods. While a third still named telephone, the number was down by -23% as were the results for in person and regular mail.

Greater Sudbury Hydro Website



The 48% (N=191) that visited the site were then asked three follow up questions on the information that the website contains. In the first, they were asked to rate the quality of the information provided.

Q28. "How would you rate the quality of the information provided on the Greater Sudbury Hydro website?"



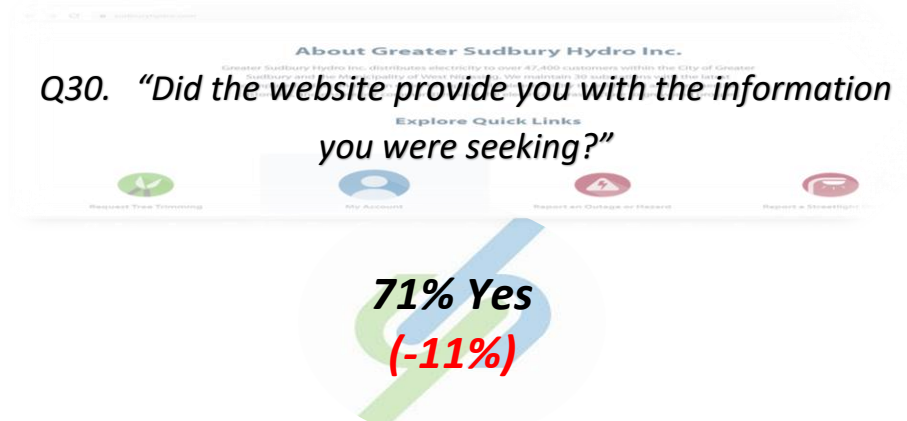
With the increased traffic to the website, there was also a drop of -9% in the percentage of customers that rated the information provided as good or very good from 2020. The total poor score rose +6% as did the neutral or satisfactory mark (+5%).

The N=191 (48%) of website visitors were then asked about the information they were looking for. Multiple responses were accepted with N=257 provided and the percentage of cases or times each category was referenced are below.

Q29. "What information did you look for?"	
<i>Account information / billing / payments</i>	44%
<i>Energy conservation / programs / save money</i>	26%
<i>News or Developments</i>	24%
<i>Rates & Fees</i>	14%
<i>Payment deferrals / Covid-19 support programs</i>	8%
<i>Corporate info</i>	3%
<i>Environment/Safety</i>	6%
<i>Contact information</i>	5%
<i>Outages / safety</i>	5%

Most visitors were seeking information about their bill, rates, how to save money through conservation as well as Covid-19 support programs, payment deferrals and general news.

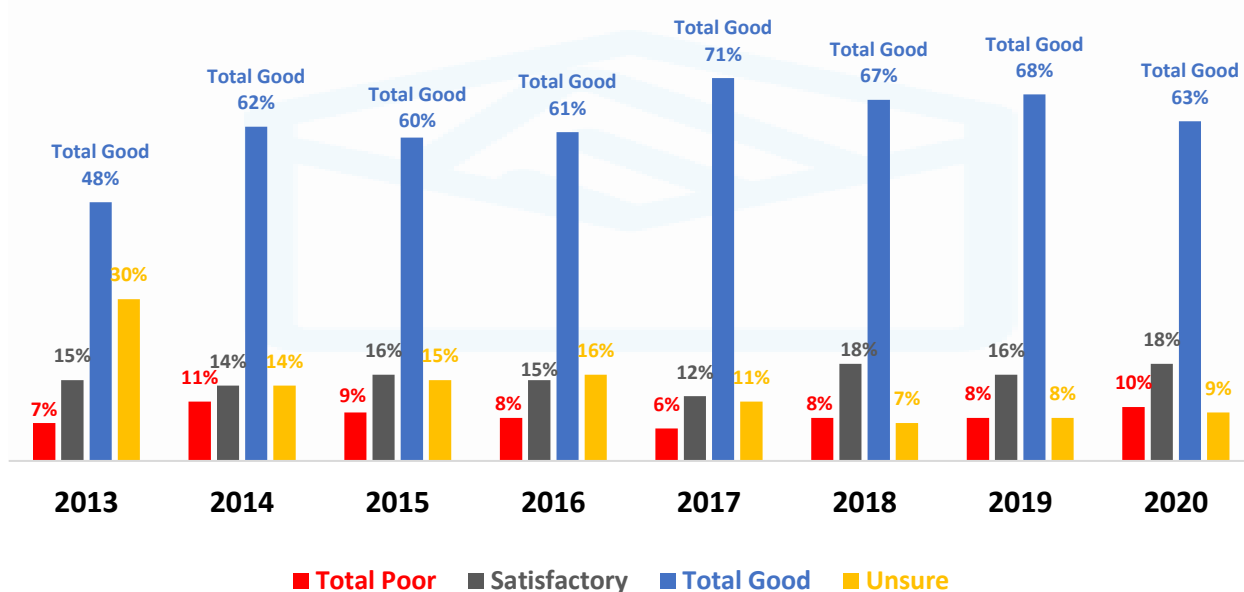
In the final website question, the N=191 visitors were asked if they found the information on the website they were looking for. Seventy-one percent said yes or that they found the information, compared to 82% in 2019 and 79% in 2018.



Rating Bill Inserts & Links

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

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 you would rate the overall quality of the material you have received from Greater Sudbury Hydro? “*

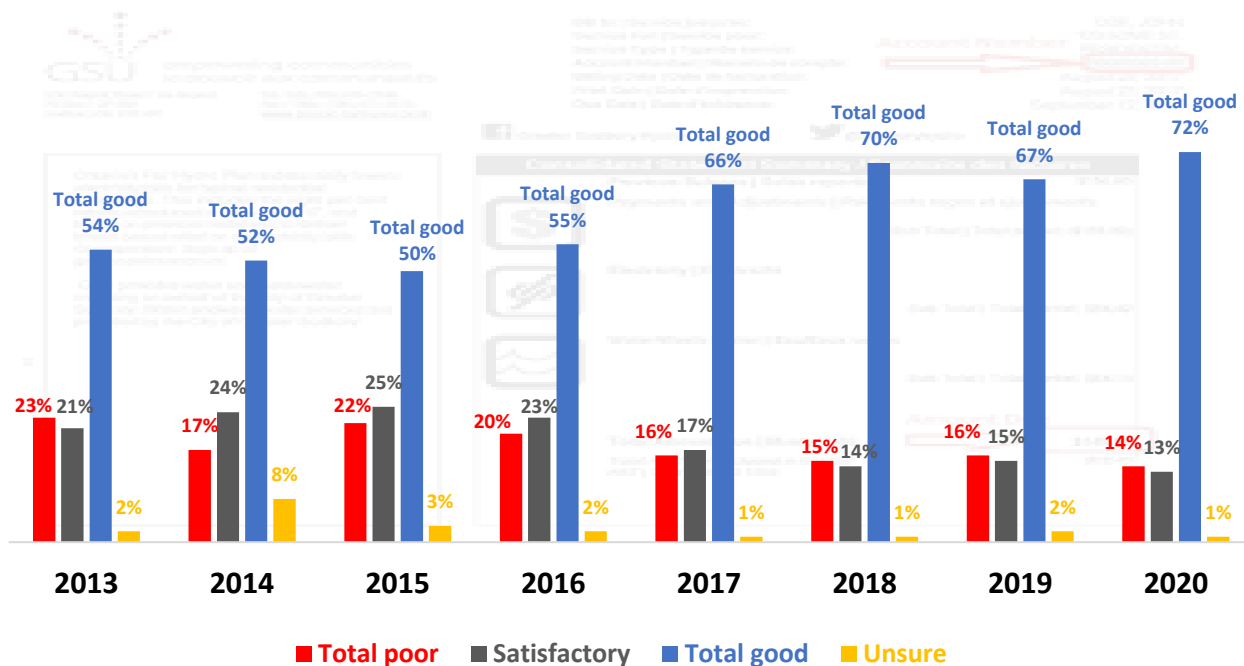


Five percent fewer or 63% (68% in 2019) provided a good or very good rating for the overall quality of bill insert or electronic link information provided.

Billing – Ease of Understanding

Residential customers rated the ease of reading or understanding their power or utility bill.

Q32. “Using a scale from one very poor to five very good, how would you rate how easy it is to read and understand your power or utility bill?”



More than seven in ten customers or 72% provided a good or very good rating for the ease of understanding their bills, +5% higher than they did in 2019 (67%).

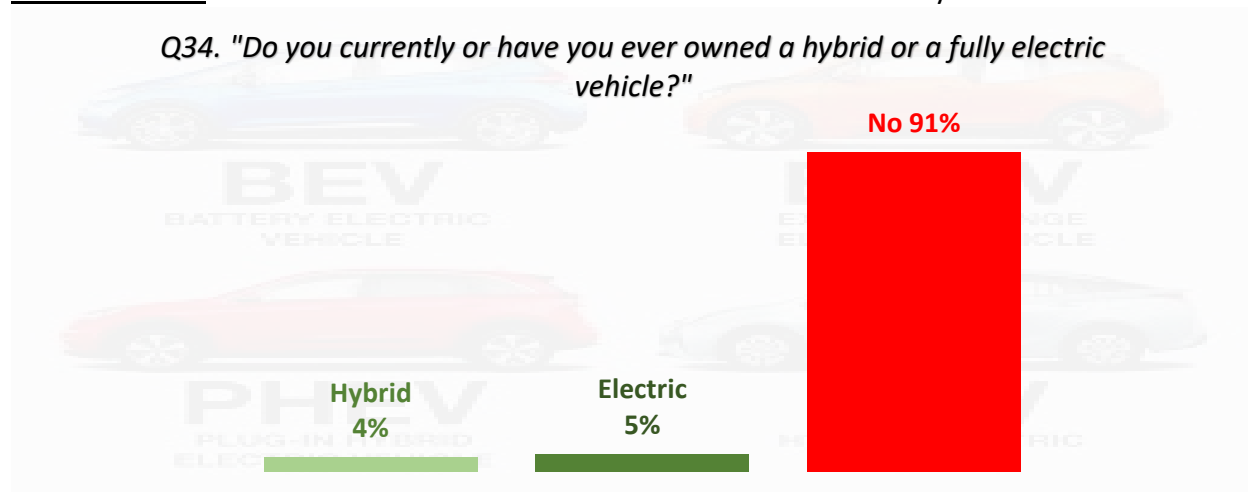
Improvement Comments

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 cost issues including lower rates, maintaining them, offering payment relief during the pandemic, and providing customers with solutions on how to save energy/money.

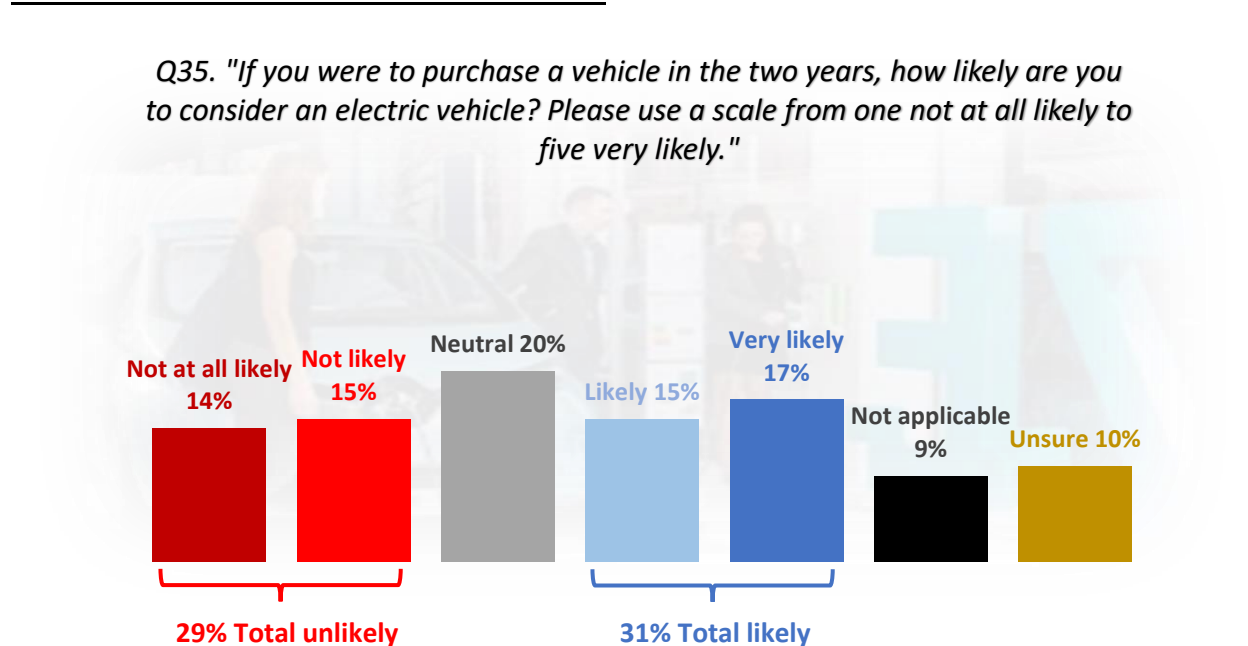
Q33. "What can Greater Sudbury Hydro do to better service its customers?"	
<i>Don't know</i>	33%
<i>Lower rates</i>	21%
<i>Maintain rates / no increases / freeze</i>	9%
<i>Bill / payment relief / flexibility during Covid-19</i>	6%
<i>More information on how to save / conserve energy</i>	6%
<i>Incentives / programs for reducing electricity</i>	5%
<i>Fewer outages / quicker response to outages</i>	5%
<i>Explain cost of energy on bills</i>	4%
<i>Information on what is involved in the price of hydro</i>	3%
<i>Lower delivery fees</i>	2%
<i>Better communication</i>	2%
<i>Make bills easier to understand / clearer</i>	1%
<i>More information on alternative energy options</i>	1%
<i>Be easier to contact</i>	1%
<i>Improve customer service</i>	1%
<i>Improve the website / make it more user friendly</i>	1%

Electric Vehicles

The final two survey questions are new to this survey wave and asked customers (N=400) about electric vehicles. In the first probe, they were questioned if they have ever owned a hybrid or electric vehicle of which 5% own or have owned an electric and 4% a hybrid vehicle.



All N=400 respondents were then asked about the likelihood of them considering the purchase of an electric vehicle over the next 24 months?

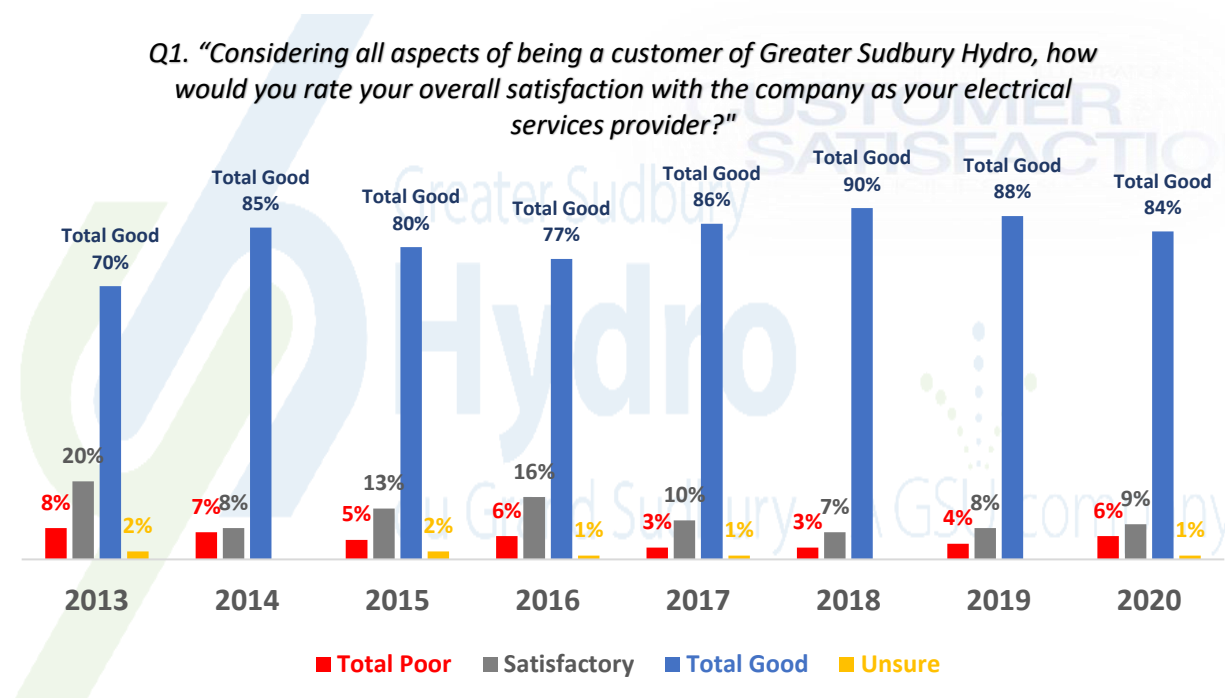


Thirty-one percent are likely (15%) or very likely (17%) to consider the purchase of an electric vehicle. Given the cost or perceived higher cost of an EV, those with higher incomes of \$100,000+ (70%) and \$75,000-\$99,999 (46%) are most likely to consider this option compared to respondents earning \$50,000-74,999 (33%) and under \$50,000 (8%). This market also tends to attract those aged 35-44 (48%), 45-54 (43%) and 55-64 (44%), compared to younger 18-34 (28%) and especially the oldest 65+ (7%).

EXECUTIVE SUMMARY – BUSINESS

Satisfaction

Businesses were first asked an overall satisfaction question. The following graph compares the current 2020 results with the previous seven surveys. Results below combine the total poor (very poor & poor) and total good (good & very good) findings.

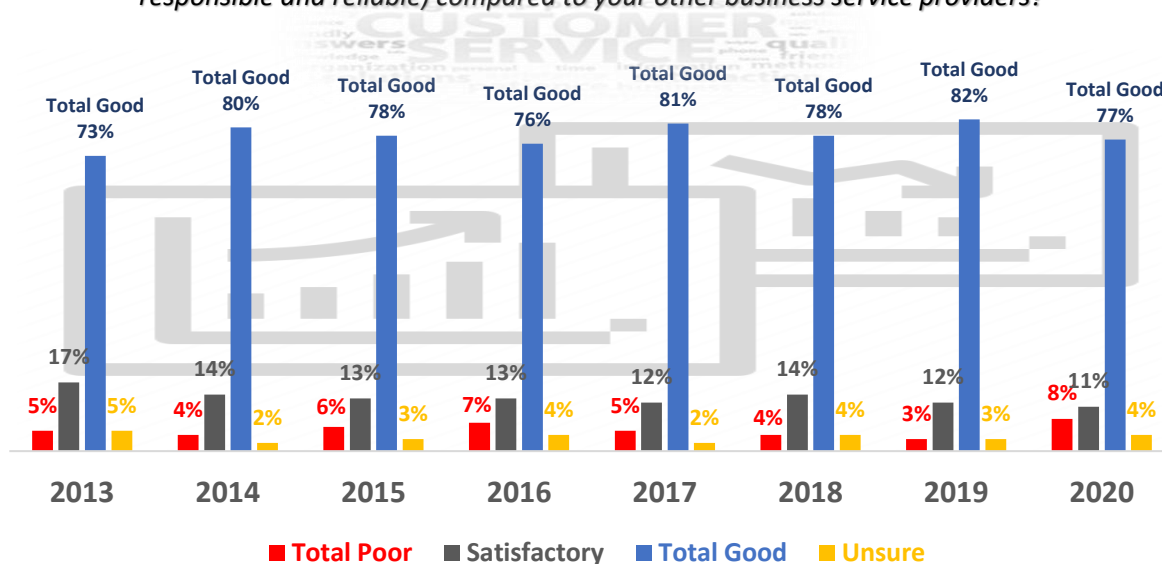


Despite dipping -4%, the overall satisfaction score as evidenced by the combined good and very good rating is still strong at 84%.

Comparative 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?"



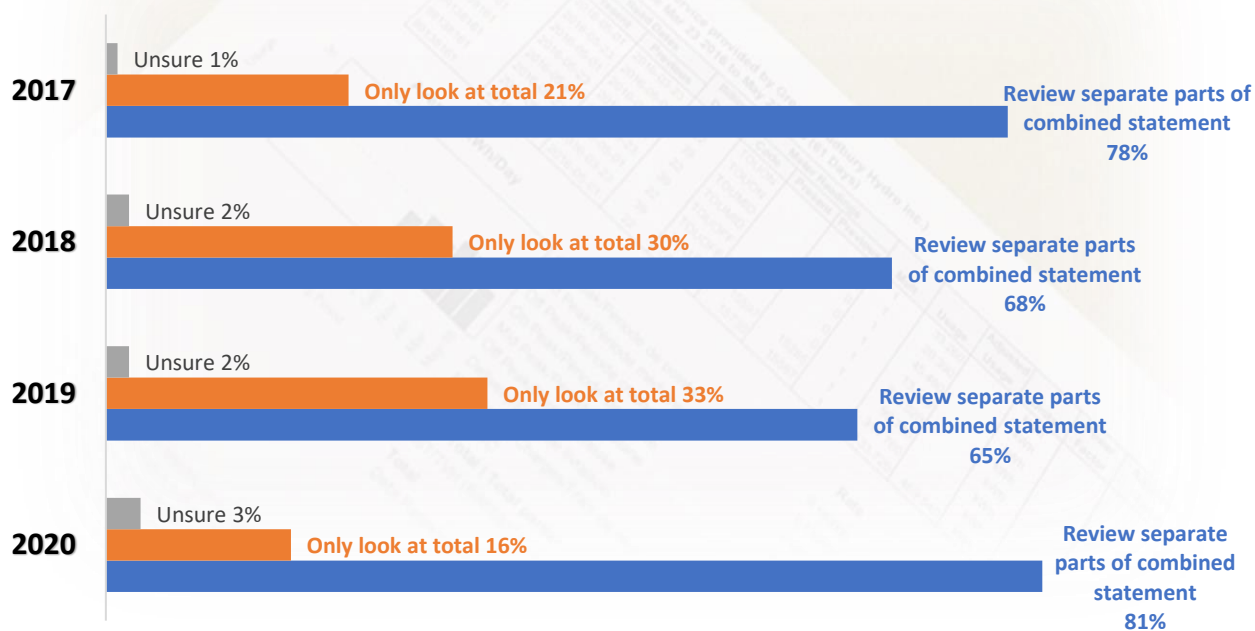
Among businesses, there was a -5% drop in the comparative customer service score positive (good & very good) rating to 77% bringing the results in line with findings from 2018.

Price & Value

Business respondents were probed about their monthly bill. They were first read a short statement describing their combined utility bill 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?"



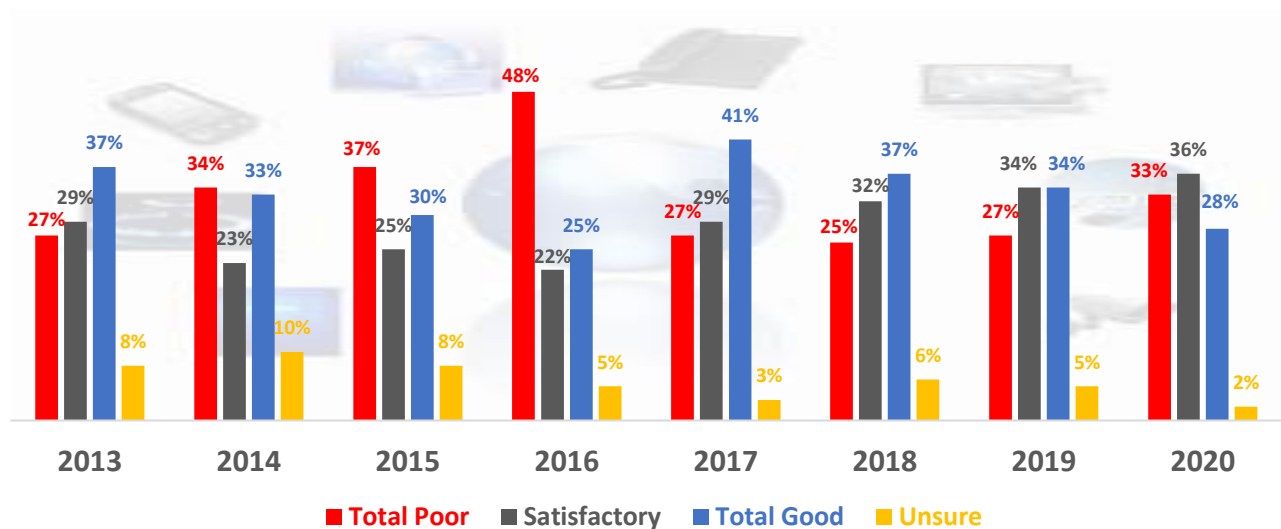
As was the case with residential customers, the year 2020 saw a sharp increase of +16% in the number of businesses that are paying more attention to their bill or reviewing separate parts of the combined statement.

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.

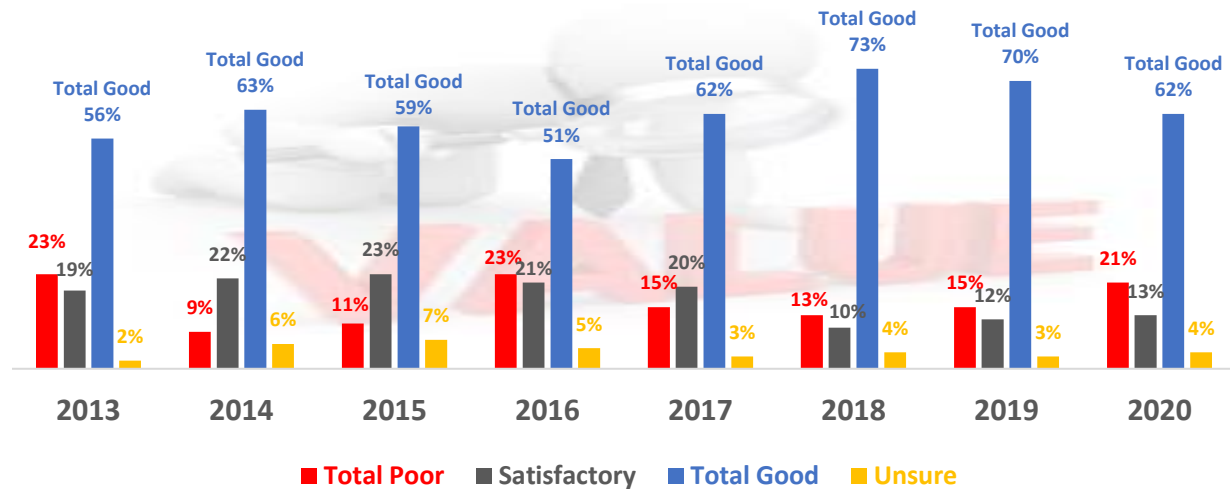
Q4. “How would you rate your satisfaction with the price you pay for electricity compared to what you pay for other (essential) business services?”



Satisfaction (good & very good ratings) with the comparative cost of electricity in relation to other essential services dropped by -6% over 2019. The negative score increased by +6%, as did the number of businesses that provided a satisfactory rating (+2%). There were 2% unsure or that 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?"



As with other cost indicators among businesses, there was a drop with respect to the overall value that GSH provides, as 62% gave a good or very good score, down -8% from the 70% in 2019.

Greater Sudbury Hydro Image Areas

Respondents were then asked to rate their level of agreement with a series of statements about the image of 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	2020	
Q6. Greater Sudbury Hydro provides customers with reliable and good service.	69%	89%	85%	81%	84%	91%	90%	93%	↑
Q7. Greater Sudbury Hydro is committed to effectively managing a balanced budget.	25%	21%	21%	19%	17%	27%	23%	20%	↓
Q8. Greater Sudbury Hydro meets its commitment to customers.	69%	86%	83%	79%	85%	86%	80%	85%	↑
Q9. GSH provides its customers with information about programs to help reduce their energy costs.	65%	71%	69%	76%	73%	70%	65%	54%	↓
Q10. Greater Sudbury Hydro is concerned about public safety and safe work practices.	65%	58%	56%	64%	74%	72%	70%	56%	↓
Q11. Greater Sudbury Hydro encourages efficient use of electricity among its customers.	55%	75%	71%	80%	82%	75%	73%	65%	↓

The highest rated category in terms of agreement continues to be for Greater Sudbury Hydro providing good and reliable service at 93%, up +3% over 2019, followed by meeting its commitment to customers at 85%, a +5% improvement. Total agreement was next best for encouraging the efficient use of electricity at 65% despite an -8% decrease.

Agreement ratings were lower for being concerned about public safety and safe work practises at 56%, dropping a significant -14% (30% answered do not know) and providing customers with information / programs to reduce energy costs at 54%, also down -11%. Lowest scored in terms of total agreement was for GSH being committed to managing a balanced budget at 20% (-3%), but most or six in ten responded do not know.

Rating Performance

Businesses were then asked to rate the performance of Greater Sudbury Hydro across four indicators related to reliability/outages. 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	2020	
Q12. The reliability of power supply	91%	90%	87%	89%	86%	92%	91%	93%	↑
Q13. Prompt responses to power outages when they occur	74%	73%	70%	72%	80%	82%	81%	86%	↑
Q14. Effectively scheduling planned power outages	61%	59%	55%	41%	58%	53%	55%	51%	↓
Q15. Effectively communicating with customers about planned power interruptions in your area	62%	53%	50%	40%	49%	45%	46%	47%	↑

Highest scored was once again the reliability of power at 93% (+2%) and then prompt response time to outages at 86% (+5%). Results fall when it comes to effectively scheduling planned outages at 51%, down -4% (42% answered unsure) and for effectively communicating with customers about planned outages at 47%, up +1% (37% answered do not know).

Rates Versus Outages

A trade-off 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.

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

RATES VERSUS OUTAGES TRADE OFF	2013	2014	2015	2016	2017	2018	2019	2019
1-lowest rates – regular outages	3%	4%	3%	3%	1%	1%	1%	2%
2-low rates – occasional outages	6%	3%	5%	4%	2%	1%	1%	17%
3-neutral – a balance between rates and outages	57%	58%	65%	69%	79%	75%	82%	76%
4-high rates – only a few outages	12%	18%	14%	9%	7%	9%	8%	2%
5-highest rates – no outages	9%	3%	2%	1%	2%	3%	2%	1%
Don't know	13%	14%	11%	14%	9%	11%	6%	2%

Most or 76% still want a balance between rates and outages, although -6% fewer than in 2019. There was a +17% increase to 19% in the number that want either low rates with occasional outages (17%) or the lowest rates with regular outages (2%). There was a corresponding drop in customers willing to accept high rates for a few outages or the highets rates and no outages.

Payment Options & Online Management

Customers were asked about their bill payments, with the first question probing about current methods for paying their GSH bill. Options were read, and multiple responses were accepted.

Q17. "Which of the following methods do you currently use to pay your GSH bill?"

READ OPTIONS

67% Online/telephone banking through your financial institution (+9%)

37% Equal monthly payment plan (+5%)

26% Automatic withdrawal from your bank account (-1%)

11% Online at Sudbury Hydro Website (n/c)

1% Payment at the Greater Sudbury Hydro office (-4%)

Online or telephone banking was most named and by an additional +9% in this survey period. Five percent more are now on an equal payment plan and results for automatic withdrawal and payment through the website were unchanged for the most part. Only 1% (-4%) said the GSH Office.

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

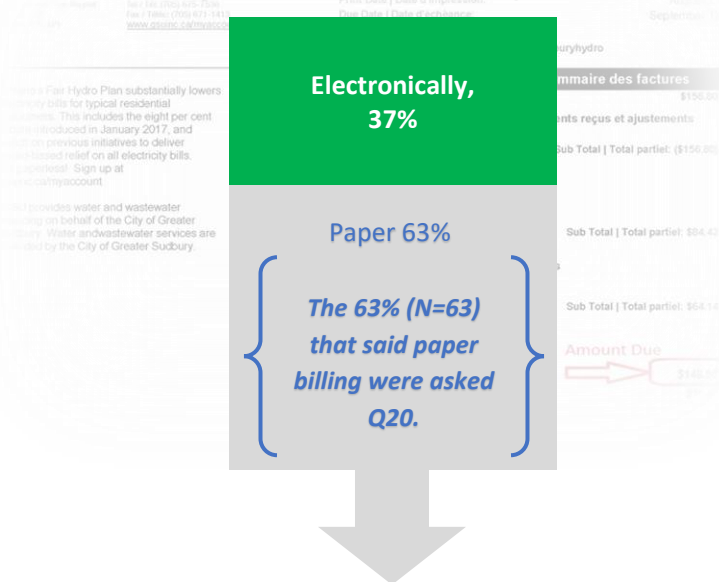
Q18. "What would be your preferred method of payment?"

	Online/telephone banking through your financial institution	59% (+7%)
	Equal monthly payment plan	19% (-2%)
	Automatic withdrawal from your bank account	15% (-1%)
	Online at Greater Sudbury Hydro website	6% (+2%)
	Payment at Greater Sudbury Hydro Office	1% (-4%)
	Unsure	0% (-2%)

Online banking was once again most named and by +7% more than in 2019, while -4% fewer said payment at the Office. The remaining results were consistent with the previous survey wave.

Business customers were then asked how they receive their bill from Greater Sudbury Hydro. Respondents that said paper (63%, N=63) were then asked an open-ended or unaided follow-up about what would get them to move to paperless billing.

Q19. "How do you currently receive your electricity bill from Greater Sudbury Hydro?"



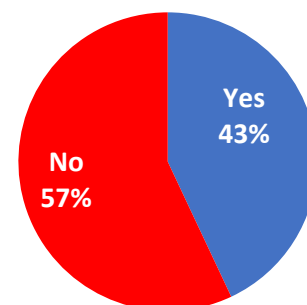
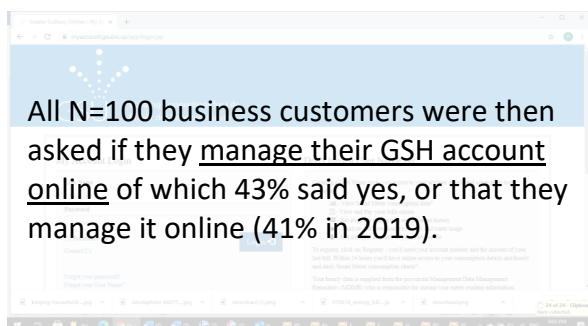
Thirty-seven percent of businesses said they get a bill electronically, +11% higher than the 26% in 2019.

With respect to getting businesses to move from paper billing, there is a sense things are all moving online. However, they still want to be assured of convenience, security, ease of set-up and access to account information.

Q20. "What would most convince you to move to electronic or paperless billing?"

Everything is going online / no choice	N=11	17%	If past bills can be accessed	N=3	5%
If it would be easier / more convenient	N=9	14%	If I could receive bill quicker / on time	N=2	3%
Don't know	N=8	13%	If it would have more info in it (details)	N=2	3%
If there was online security	N=7	11%	Offer option / let customers know	N=2	3%
Nothing no interest	N=7	11%	It would use less paper	N=1	2%
I plan to, just haven't done it yet	N=5	8%	We need hard copies / paper record	N=1	2%
If easy to set up / access	N=4	6%	If a discount / lower price was offered	N=1	2%

Q21. "Do You currently manage your GSH account Online?"

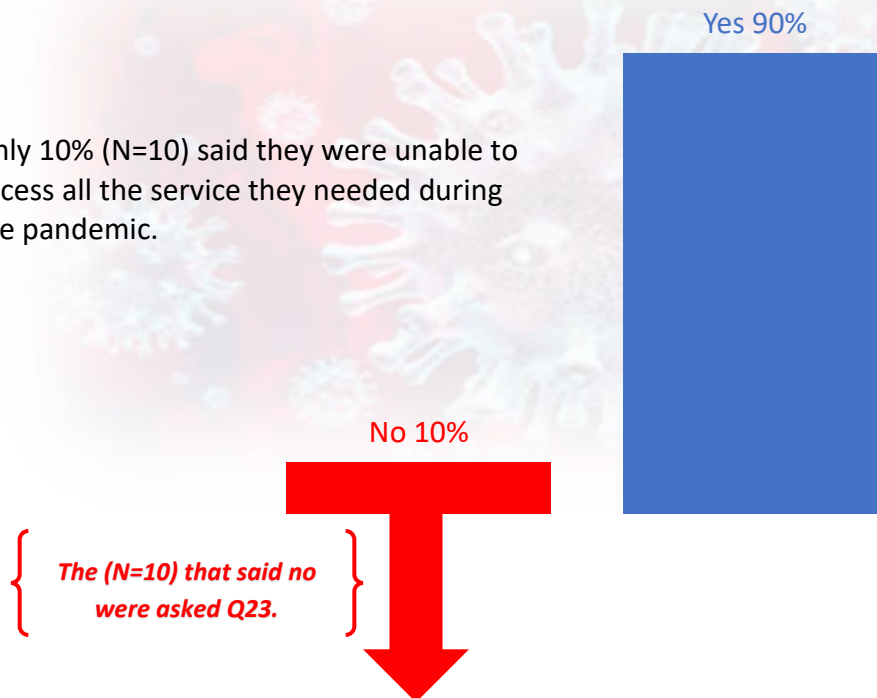


Covid-19 & Service

Two new questions about accessing services from Greater Sudbury Hydro during the Covid-19 pandemic were asked. The first probed if customers were able to access all the services they needed, and if they answered no, an open-ended question asking for details followed.

Q22. "Have you been able to access all the services you need from Greater Sudbury Hydro during the COVID pandemic?"

Only 10% (N=10) said they were unable to access all the service they needed during the pandemic.



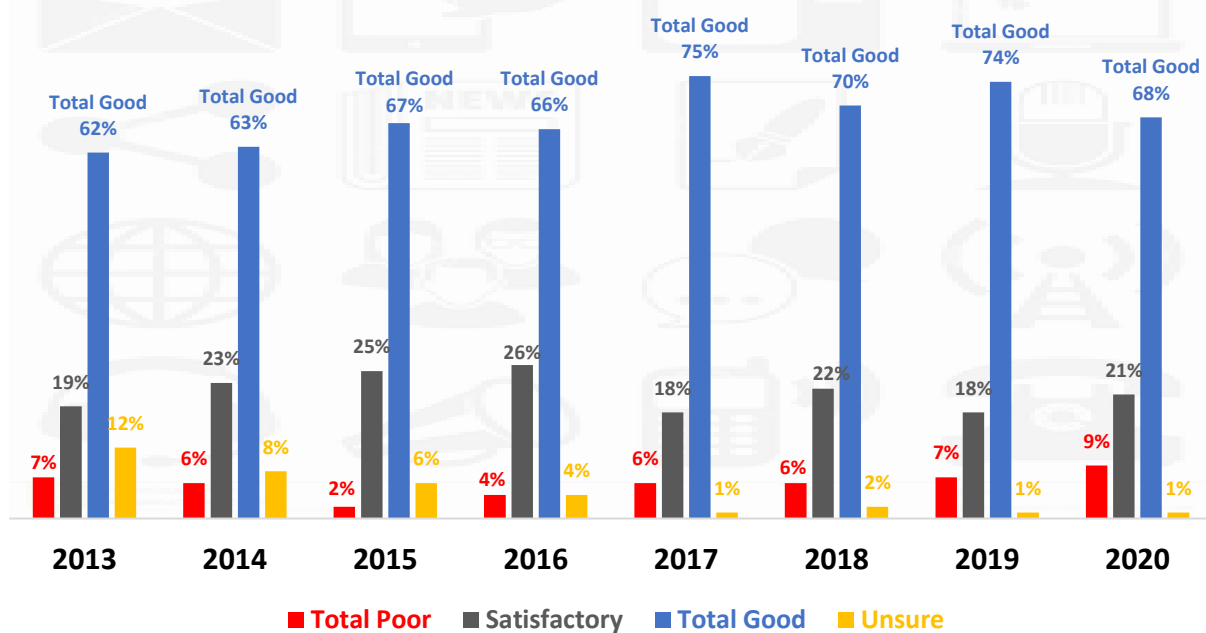
Q23. "What services have you not been able to access?"

Billing inquiries	N=3
Information / assistance with relief programs	N=3
Outage information / update	N=2
Payment deferrals	N=1
Energy conservation program information	N=1

Communication

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

Q24. "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."



Sixty-eight percent of businesses rated communications as being good or very good, a decrease of -6% from 2019.

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

Q25. “What is your preferred method to have Greater Sudbury Hydro communicate information to you?”

<i>E-mail from the company</i>	65% (+8%)
<i>Social media, such as Facebook or Twitter</i>	13% (+1%)
<i>Bill inserts / attachments to e-bill</i>	12% (-2%)
<i>Direct mail</i>	4% (-6%)
<i>Greater Sudbury Hydro Website</i>	5% (-1%)
<i>Newspaper advertising</i>	1% (n/c)

Email is the preferred method by which most want to have the utility communicate with them, while more traditional methods such as direct mail continue to decline in importance.

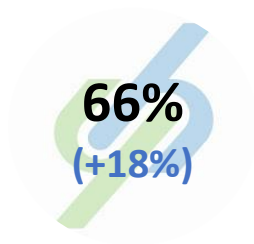
In another open or unaided question, business customers were asked about how they would most like to communicate with Greater Sudbury Hydro.

Q26. “And as a customer, what is your preferred method that you would like to communicate with Greater Sudbury Hydro?”

<i>Email</i>	70% (+20%)
<i>Telephone</i>	23% (-21%)
<i>Social media</i>	6% (+2%)
<i>Link or form on GSH Website</i>	2% (+1%)

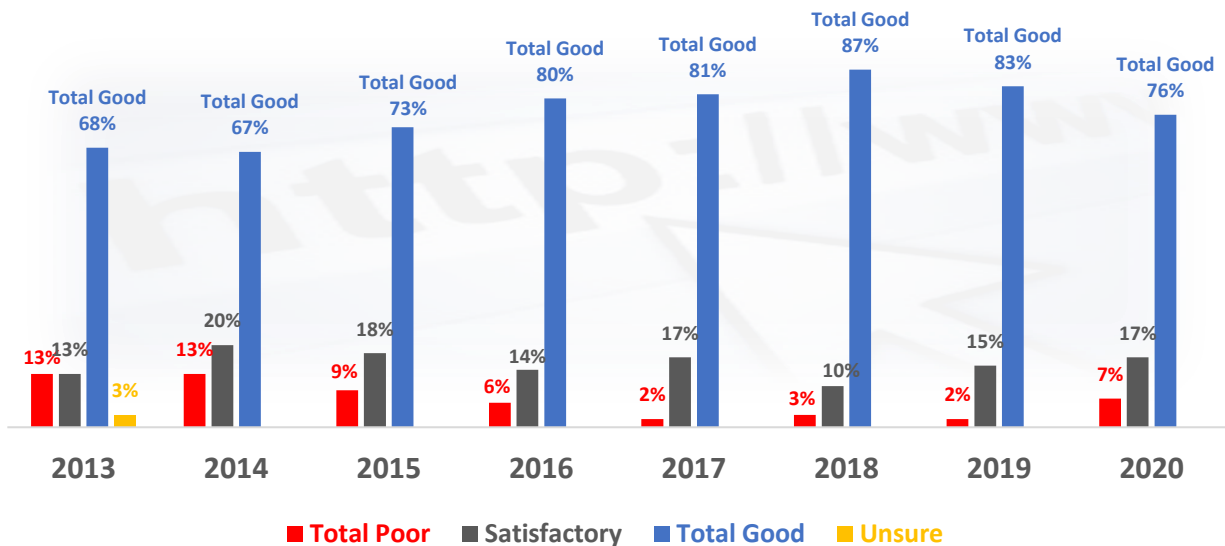
The pandemic survey period has also resulted in most businesses now wanting to communicate electronically.

Greater Sudbury Hydro Website



The 66% (N=66) that visited the site were then asked three follow up questions on the information that the website contains. In the first, they were asked to rate the quality of the information provided.

Q28. "How would you rate the quality of the information provided on the Greater Sudbury Hydro website?"



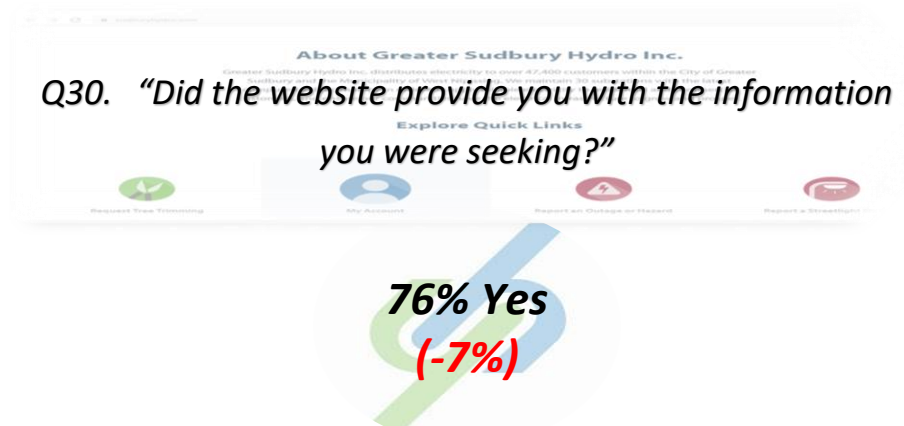
The total good and very good rating fell -7%, with +2% more giving a mid range score and +5% a poor or very poor mark.

The N=66 website visitors were then asked about the information they were looking for. Multiple responses were accepted with N=81 provided and the percentage of cases or times each category was referenced are below.

Q30. "What information did you look for?"	
<i>Account information</i>	39%
<i>Rates & Fees</i>	26%
<i>Energy conservation</i>	26%
<i>News or Developments</i>	9%
<i>Outages</i>	8%
<i>Payment deferrals / Covid-19 support programs</i>	6%
<i>Corporate info</i>	5%
<i>Report an issue</i>	3%
<i>Contact information</i>	2%

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

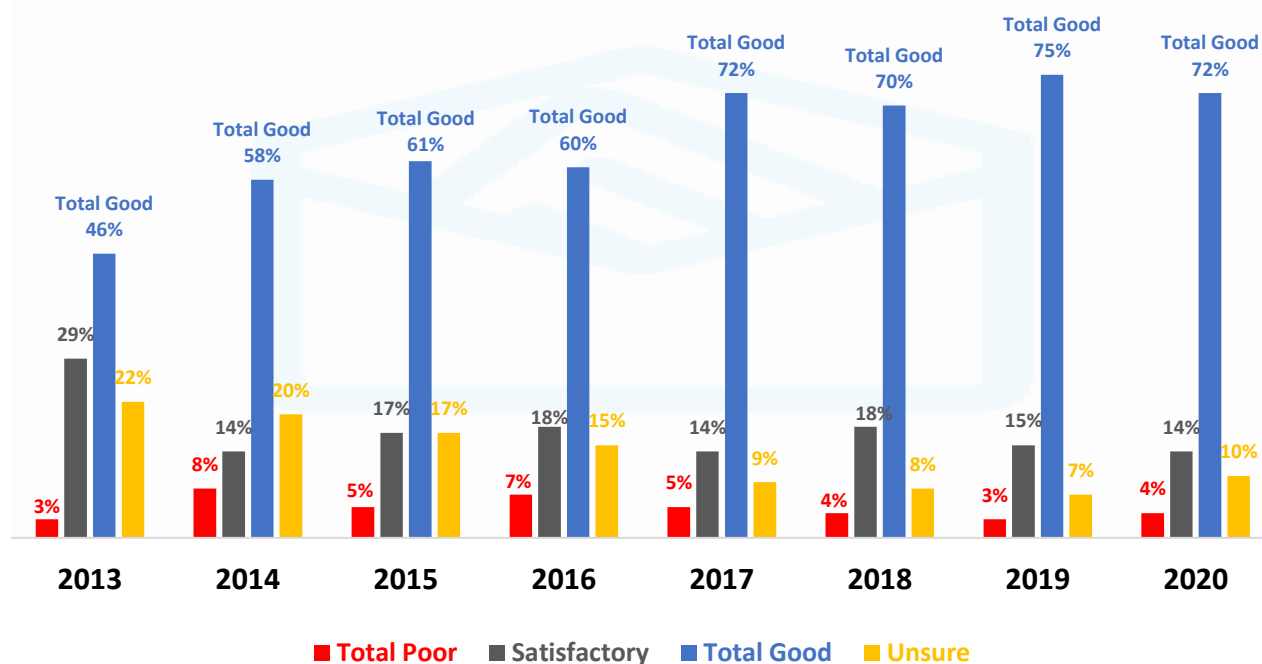
In the final website question, the N=66 visitors were asked if they found the information on the website they were looking for. Seventy-six percent said yes or that they found the information, compared to 83% in 2019.



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 you would rate the overall quality of the material you have received from Greater Sudbury Hydro? “

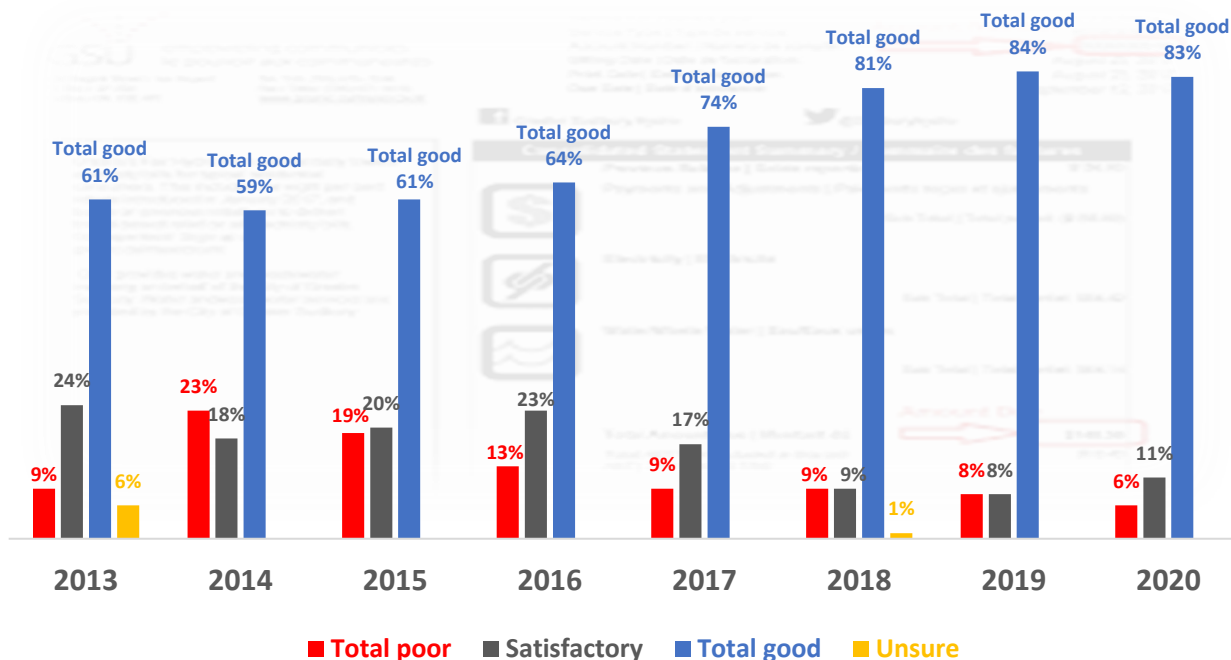


The good and very good rating provided for bill inserts or electronic bill links is 72%, down -3% from 2019.

Billing – Ease of Understanding

Businesses rated the ease of reading or understanding their power bill.

Q32. “Using a scale from one very poor to five very good, how would you rate how easy it is to read and understand your power or utility bill?”



Results are consistent with a strong majority providing a good or very good rating for the ease of understanding their bill.

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, with cost or price issues dominating.

Q33. "What can Greater Sudbury Hydro do to better service its customers?"

<i>Lower rates</i>	<i>29%</i>
<i>Maintain rates / no increases / freeze</i>	<i>27%</i>
<i>Don't know</i>	<i>20%</i>
<i>Information on what is involved in the price of hydro</i>	<i>6%</i>
<i>Be easier to reach</i>	<i>6%</i>
<i>Bill / payment relief / flexibility during Covid-19</i>	<i>4%</i>
<i>Make bills easier to understand / more clearer</i>	<i>2%</i>
<i>Better communication</i>	<i>1%</i>
<i>No interruptions / outages</i>	<i>1%</i>
<i>More information on how to save / conserve energy</i>	<i>1%</i>
<i>Improve the website / make it more user friendly</i>	<i>1%</i>
<i>Incentives / programs for reducing electricity</i>	<i>1%</i>
<i>Fewer outages / quicker response to outages</i>	<i>1%</i>

RESIDENTIAL RESULT BY QUESTION

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

		Frequency	Percent
	1-very poor	11	2.8
	2-poor	27	6.8
	3-satisfactory	45	11.3
	4-good	148	37.0
	5-very good	165	41.3
	Don't know	4	1.0
	Total	400	100.0

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

		Frequency	Percent
	1-very poor	8	2.0
	2-poor	15	3.8
	3-satisfactory	48	12.0
	4-good	171	42.8
	5-very good	149	37.3
	Don't know	9	2.3
	Total	400	100.0

“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?

		Frequency	Percent
	1-review separate parts of combined statement	287	71.8
	2-only look at total	95	23.8
	Don't know	18	4.5
	Total	400	100.0

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

Q4. Using a scale from one very poor to five very good, how would you rate your satisfaction with the price that you pay for electricity compared to what you pay for other [essential] services in your area?			
		Frequency	Percent
	1-very poor	52	13.0
	2-poor	38	9.5
	3-satisfactory	135	33.8
	4-good	109	27.3
	5-very good	61	15.3
	Don't know	5	1.3
	Total	400	100.0

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?			
		Frequency	Percent
	1-very poor	13	3.3
	2-poor	23	5.8
	3-satisfactory	95	23.8
	4-good	151	37.8
	5-very good	108	27.0
	Don't know	10	2.5
	Total	400	100.0

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

Q6. Greater Sudbury Hydro provides customers with reliable and good service			
		Frequency	Percent
	1-strongly disagree	8	2.0
	2-somewhat disagree	15	3.8
	3-neither agree nor disagree	39	9.8
	4-somewhat agree	154	38.5
	5-strongly agree	180	45.0
	Don't know	4	1.0
	Total	400	100.0

Q7. Greater Sudbury Hydro is committed to effectively managing a balanced budget			
		Frequency	Valid Percent
	1-strongly disagree	27	6.8
	2-somewhat disagree	14	3.5
	3-neither agree nor disagree	58	14.5
	4-somewhat agree	83	20.8
	5-strongly agree	45	11.3
	Don't know	173	43.3
	Total	400	100.0

Q8. Greater Sudbury Hydro meets its commitment to customers			
		Frequency	Valid Percent
	1-strongly disagree	16	4.0
	2-somewhat disagree	13	3.3
	3-neither agree nor disagree	35	8.8
	4-somewhat agree	156	39.0
	5-strongly agree	168	42.0
	Don't know	12	3.0
	Total	400	100.0

Q9. Greater Sudbury Hydro provides its customers with information about programs to help customers reduce their energy costs			
		Frequency	Valid Percent
	1-strongly disagree	23	5.8
	2-somewhat disagree	31	7.8
	3-neither agree nor disagree	83	20.8
	4-somewhat agree	145	36.3
	5-strongly agree	107	26.8
	Don't know	11	2.8
	Total	400	100.0

Q10. Greater Sudbury Hydro is concerned about public safety and safe work practices			
		Frequency	Percent
	1-strongly disagree	6	1.5
	2-somewhat disagree	6	1.5
	3-neither agree nor disagree	35	8.8
	4-somewhat agree	115	28.8
	5-strongly agree	124	31.0
	Don't know	114	28.5
	Total	400	100.0

Q11. Greater Sudbury Hydro encourages efficient use of electricity among its customers			
		Frequency	Percent
	1-strongly disagree	10	2.5
	2-somewhat disagree	19	4.8
	3-neither agree nor disagree	88	22.0
	4-somewhat agree	146	36.5
	5-strongly agree	119	29.8
	Don't know	18	4.5
	Total	400	100.0

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

Q12. The reliability of electricity supply			
		Frequency	Valid Percent
	1-very poor	4	1.0
	2-poor	4	1.0
	3-satisfactory	33	8.3
	4-good	156	39.0
	5-very good	199	49.8
	Don't know	4	1.0
	Total	400	100.0

Q13. Prompt response(s) to electricity outages when they occur			
		Frequency	Percent
	1-very poor	6	1.5
	2-poor	7	1.8
	3-satisfactory	56	14.0
	4-good	157	39.3
	5-very good	164	41.0
	Don't know	10	2.5
	Total	400	100.0

Q14. Effectively scheduling planned electricity outages			
		Frequency	Percent
	1-very poor	13	3.3
	2-poor	4	1.0
	3-satisfactory	32	8.0
	4-good	140	35.0
	5-very good	111	27.8
	Don't know	100	25.0
	Total	400	100.0

Q15. Effectively communicating with customers about planned electricity interruptions in your area			
		Frequency	Percent
	1-very poor	15	3.8
	2-poor	14	3.5
	3-satisfactory	32	8.0
	4-good	114	28.5
	5-very good	100	25.0
	Don't know	125	31.3
	Total	400	100.0

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

		Frequency	Percent
	1-lowest rates regular outages	15	3.8
	2-low rates occasional outages	44	11.0
	3-balance between rates and outages	248	62.0
	4-high rates only a few outages	33	8.3
	5-highest rates no outages	24	6.0
	Don't know	36	9.0
	Total	400	100.0

Q17. Which of the following methods do you currently use to pay your GSH bill? READ

Q17a. Online/telephone banking through your financial institution			
		Frequency	Percent
	Yes	280	70.0

Q17b. Online at Sudbury Hydro Website			
		Frequency	Percent
	Yes	30	7.5

Q17c. Automatic withdrawal from your bank account			
		Frequency	Percent
	Yes	130	32.5

Q17d. Equal monthly payment plan			
		Frequency	Percent
	Yes	151	37.8

Q17e. Payment at the Greater Sudbury Hydro office			
		Frequency	Percent
	Yes	5	1.3

Q18. What would be your preferred method of payment?			
		Frequency	Percent
	Online/telephone banking through your financial institution	268	67%
	Automatic withdrawal from your bank account	84	21%
	Equal monthly payment plan	38	10%
	Online at Sudbury Hydro Website	5	1%
	Payment at the Greater Sudbury Hydro office	5	1%
	Total	400	100.0

Q19. How do you currently receive your electricity bill from Greater Sudbury Hydro?			
		Frequency	Percent
	Paper	263	65.8
	Electronically	137	34.3
	Total	400	100.0

IF YES ASK Q20 / OTHERS SKIP TO Q21

Q20.What would most convince you to move to electronic or paperless billing?			
		Frequency	Percent
	Don't know	43	16.3
	It would use less paper	34	12.9
	If it would be easier / more convenient	32	12.2
	If it would have more information in it (details)	28	10.6
	Offer the option / let customers know of option	25	9.5
	Everything is going online / no choice	21	8.0
	Nothing no interest	18	6.8
	If I could receive bill quicker / on time	17	6.5
	If easy to set up / access	9	3.4
	I plan to, just haven't done it yet	8	3.0
	If a discount / lower price was offered	6	2.3
	If I can view on phone	5	1.9
	As long as it is secure	5	1.9
	Better for environment	4	1.5
	Nothing I prefer a hard copy	3	1.1
	Saves money	3	1.1
	If past bills can be accessed	2	.8
	Total	263	100.0

Q21. Do You currently manage your GSH account Online?			
		Frequency	Percent
	No	231	57.8
	Yes	169	42.3
	Total	400	100.0

Q22. Have you been able to access all the services you need from Greater Sudbury Hydro during the COVID pandemic?			
		Frequency	Percent
	Yes	367	91.8
	No	33	8.3
	Total	400	100.0

IF YES ASK Q23

Q23. What services have you not able to access?			
		Frequency	Percent
	Billing inquiries	11	33.3
	Information / assistance with relief programs	5	15.2
	Payment deferrals	5	15.2
	Payments at office	4	12.1
	Waits / on hold too long	4	12.1
	Outage information / update	3	9.1
	Streetlight out	1	3.0
	Total	33	100.0

Q24. 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...

		Frequency	Percent
	4-good	159	39.8
	5-very good	123	30.8
	3-satisfactory	78	19.5
	2-poor	20	5.0
	1-very poor	11	2.8
	Don't know	9	2.3
	Total	400	100.0

Q25. What is your preferred method to have Greater Sudbury Hydro communicate information to you?

		Frequency	Percent
	E-mail from the company	126	31.5
	Social media, such as Facebook or Twitter	112	28.0
	Bill inserts	59	14.8
	Direct mail	41	10.3
	Greater Sudbury Hydro Website	22	5.5
	Don't know/no preference	16	4.0
	Texts / Phone app	12	3.0
	Newspaper advertising	5	1.3
	Radio	4	1.0
	Telephone	2	.5
	Customer newsletter	1	.3
	Total	400	100.0

Q26. And as a customer, what is your preferred method that you would like to communicate with Greater Sudbury Hydro?			
		Frequency	Percent
	Email	174	43.5
	Telephone	131	32.8
	Social media	59	14.8
	Texts	14	3.5
	Link or form on Greater Sudbury Hydro Website	9	2.3
	Don't know/no preference	7	1.8
	In person at office	5	1.3
	Regular mail	1	.3
	Total	400	100.0

Q27. Have you visited the Greater Sudbury Hydro website within the past 12 months?			
		Frequency	Percent
	Yes	191	47.8
	No	209	52.3
	Total	400	100.0

IF YES ASK Q28 / NO SKIP TO Q31

Q28. How would you rate the quality of the information provided on the Greater Sudbury Hydro website?			
		Frequency	Percent
	1-very poor	5	2.6
	2-poor	21	11.0
	3-satisfactory	33	17.3
	4-good	78	40.8
	5-very good	50	26.2
	Don't know	4	2.1
	Total	191	100.0

Q29. What information did you look for?		Responses		Percent of
		N	Percent	Cases
	Account information / billing / payments	84	32.7%	44.0%
	Rates & Fees	27	10.5%	14.1%
	Corporate info	5	1.9%	2.6%
	Energy conservation / programs / save money	50	19.5%	26.2%
	Environment/Safety	12	4.7%	6.3%
	News or Developments	46	17.9%	24.1%
	Contact information	9	3.5%	4.7%
	Outages / safety	9	3.5%	4.7%
	Payment deferrals / Covid-19 support programs	15	5.8%	7.9%
Total		257	100.0%	134.6%

Q30. Did the website provide you with the information you were seeking?			
		Frequency	Percent
	Yes	135	70.7
	No	56	29.3
	Total	191	100.0

Q31. From time to time, Sudbury Hydro attaches information to your bill in the form of a bill insert, or for electronic bill, in the form of a link. Using a scale from one very poor to five very good, how you would rate the overall quality of this material...			
		Frequency	Percent
	1-very poor	18	4.5
	2-poor	22	5.5
	3-satisfactory	69	17.3
	4-good	156	39.0
	5-very good	99	24.8
	Don't know	36	9.0
	Total	400	100.0

**Q32.Using a scale from one very poor to five very good,
how would you rate how easy it is to read and
understand your electricity or utility bill?**

		Frequency	Percent
	1-very poor	21	5.3
	2-poor	37	9.3
	3-satisfactory	51	12.8
	4-good	172	43.0
	5-very good	115	28.8
	Don't know	4	1.0
	Total	400	100.0

Q33.What can Greater Sudbury Hydro do to better service its customers?

		Frequency	Percent
	Don't know	133	33.3
	Lower rates	85	21.3
	Maintain rates / no increases / freeze	36	9.0
	Bill / payment relief / flexibility during Covid-19	24	6.0
	More information on how to save / conserve energy	23	5.8
	Incentives / programs for reducing electricity	21	5.3
	Fewer outages / quicker response to outages	21	5.3
	Explain cost of energy on bills	14	3.5
	Information on what is involved in the price of hydro	11	2.8
	Lower delivery fees	8	2.0
	Better communication	6	1.5
	Make bills easier to understand / clearer	5	1.3
	More information on alternative energy options	4	1.0
	Be easier to contact	4	1.0
	Improve customer service	3	.8
	Improve the website / make it more user friendly	2	.5
	Total	400	100.0

**Q34. Do you currently or have you ever owned a hybrid or a
fully electric vehicle?**

		Frequency	Percent
	Yes - hybrid	15	3.8
	Fully electric	21	5.3
	No	364	91.0
	Total	400	100.0

Q35. If you were to purchase a vehicle in the two years, how likely are you to consider an electric vehicle? Please use a scale from one not at all likely to five very likely.			
		Frequency	Percent
	Not at all likely	55	13.8
	Not likely	60	15.0
	Neutral	80	20.0
	Likely	60	15.0
	Very likely	71	17.8
	Not applicable	35	8.8
	Unsure	39	9.8
	Total	400	100.0

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

D1. Which of the following age groups may I place you in?			
		Frequency	Percent
	18-34	108	27.0
	35-44	67	16.8
	45-54	53	13.3
	55-64	78	19.5
	65 and over	79	19.8
	Refused	15	3.8
	Total	400	100.0

D2. What is your combined family income?			
		Frequency	Percent
	Under \$50,000	114	28.5
	\$50,000-\$74,999	80	20.0
	\$75,000-\$99,999	75	18.8
	\$100,000 & over	61	15.3
	Refused	70	17.5
	Total	400	100.0

D3. Gender			
		Frequency	Percent
	Male	182	45.5
	Female	218	54.5
	Total	400	100.0

BUSINESS RESULTS BY QUESTION

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

		Frequency	Percent
	1-very poor	3	3.0
	2-poor	3	3.0
	3-satisfactory	9	9.0
	4-good	43	43.0
	5-very good	41	41.0
	Don't know	1	1.0
	Total	100	100.0

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

		Frequency	Percent
	1-very poor	4	4.0
	2-poor	4	4.0
	3-satisfactory	11	11.0
	4-good	32	32.0
	5-very good	45	45.0
	Don't know	4	4.0
	Total	100	100.0

“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?

		Frequency	Percent
	1-review separate parts of combined statement	81	81.0
	2-only look at total	16	16.0
	Don't know	3	3.0
	Total	100	100.0

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

Q4. Using a scale from one very poor to five very good, how would you rate your satisfaction with the price that you pay for electricity compared to what you pay for other [essential] services in your area ...			
		Frequency	Percent
	1-very poor	11	11.0
	2-poor	23	23.0
	3-satisfactory	36	36.0
	4-good	19	19.0
	5-very good	9	9.0
	Don't know	2	2.0
	Total	100	100.0

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?			
		Frequency	Percent
	1-very poor	11	11.0
	2-poor	10	10.0
	3-satisfactory	13	13.0
	4-good	38	38.0
	5-very good	24	24.0
	Don't know	4	4.0
	Total	100	100.0

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

Q6. Greater Sudbury Hydro provides customers with reliable and good service			
		Frequency	Percent
	1-strongly disagree	2	2.0
	2-somewhat disagree	2	2.0
	3-neither agree nor disagree	3	3.0
	4-somewhat agree	41	41.0
	5-strongly agree	52	52.0
	Total	100	100.0

Q7. Greater Sudbury Hydro is committed to effectively managing a balanced budget			
		Frequency	Percent
	1-strongly disagree	3	3.0
	2-somewhat disagree	9	9.0
	3-neither agree nor disagree	8	8.0
	4-somewhat agree	14	14.0
	5-strongly agree	6	6.0
	Don't know	60	60.0
	Total	100	100.0

Q8. Greater Sudbury Hydro meets its commitment to customers			
		Frequency	Percent
	1-strongly disagree	2	2.0
	2-somewhat disagree	1	1.0
	3-neither agree nor disagree	11	11.0
	4-somewhat agree	35	35.0
	5-strongly agree	50	50.0
	Don't know	1	1.0
	Total	100	100.0

Q9. Greater Sudbury Hydro provides its customers with information about programs to help customer			
		Frequency	Percent
	1-strongly disagree	8	8.0
	2-somewhat disagree	8	8.0
	3-neither agree nor disagree	27	27.0
	4-somewhat agree	30	30.0
	5-strongly agree	24	24.0
	Don't know	3	3.0
	Total	100	100.0

Q10. Greater Sudbury Hydro is concerned about public safety and safe work practices			
		Frequency	Percent
	1-strongly disagree	2	2.0
	2-somewhat disagree	4	4.0
	3-neither agree nor disagree	6	6.0
	4-somewhat agree	29	29.0
	5-strongly agree	27	27.0
	Don't know	32	32.0
	Total	100	100.0

Q11. Greater Sudbury Hydro encourages efficient use of electricity among its customers			
		Frequency	Percent
	1-strongly disagree	4	4.0
	2-somewhat disagree	5	5.0
	3-neither agree nor disagree	20	20.0
	4-somewhat agree	28	28.0
	5-strongly agree	37	37.0
	Don't know	6	6.0
	Total	100	100.0

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

Q12. The reliability of electricity supply			
		Frequency	Percent
	2-poor	3	3.0
	3-satisfactory	4	4.0
	4-good	59	59.0
	5-very good	34	34.0
	Total	100	100.0

Q13. Prompt response(s) to electricity outages when they occur			
		Frequency	Percent
	1-very poor	2	2.0
	2-poor	1	1.0
	3-satisfactory	8	8.0
	4-good	54	54.0
	5-very good	32	32.0
	Don't know	3	3.0
	Total	100	100.0

Q14. Effectively scheduling planned electricity outages			
		Frequency	Percent
	1-very poor	1	1.0
	2-poor	2	2.0
	3-satisfactory	4	4.0
	4-good	26	26.0
	5-very good	25	25.0
	Don't know	42	42.0
	Total	100	100.0

Q15. Effectively communicating with customers about planned electricity interruptions in your area			
		Frequency	Percent
	1-very poor	2	2.0
	2-poor	2	2.0
	3-satisfactory	12	12.0
	4-good	35	35.0
	5-very good	12	12.0
	Don't know	37	37.0
	Total	100	100.0

Q16. I am going to ask your opinion on the issue of balancing the price you pay for maintenance and renewal of your local electricity infrastructure with the security of your electricity service delivery or "keeping the lights on".			
		Frequency	Percent
	1-lowest rates regular outages	2	2.0
	2-low rates occasional outages	17	17.0
	3-balance between rates and outages	76	76.0
	4-high rates only a few outages	2	2.0
	5-highest rates no outages	1	1.0
	Don't know	2	2.0
	Total	100	100.0

Q17. "Which of the following methods do you currently use to pay your GSH bill?" READ

Q17a. Online/telephone banking through your financial institution			
		Frequency	Percent
	Yes	67	67.0

Q17b. Online at Sudbury Hydro Website			
		Frequency	Valid Percent
	Yes	11	11.0

Q17c. Automatic withdrawal from your bank account			
		Frequency	Percent
	Yes	26	26.0

Q17d. Equal monthly payment plan			
		Frequency	Percent
	Yes	37	37.0

Q17e. Payment at the Greater Sudbury Hydro office			
		Frequency	Percent
	Yes	1	1.0

Q18. What would be your preferred method of payment?			
		Frequency	Percent
	Online/telephone banking through your financial institution	59	59.0
	Equal monthly payment plan	19	19.0
	Automatic withdrawal from your bank account	15	15.0
	Online at Sudbury Hydro Website	6	6.0
	Payment at the Greater Sudbury Hydro office	1	1.0
	Total	100	100.0

Q19. How do you currently receive your electricity bill from Greater Sudbury Hydro?			
		Frequency	Percent
	Paper	63	63.0
	Electronically	37	37.0
	Total	100	100.0

IF PAPER ASK Q20 / OTHERS SKIP TO Q21

Q20.What would most convince you to move to electronic or paperless billing?			
		Frequency	Percent
	Everything is going online / no choice	11	17.5
	If it would be easier / more convenient	9	14.3
	Don't know	8	12.7
	If there was online security	7	11.1
	Nothing no interest	7	11.1
	I plan to, just haven't done it yet	5	7.9
	If easy to set up / access	4	6.3
	If past bills can be accessed	3	4.8
	If I could receive bill quicker / on time	2	3.2
	If it would have more information in it (details)	2	3.2
	Offer the option / let customers know of option	2	3.2
	It would use less paper	1	1.6
	We need hard copies / paper record	1	1.6
	If a discount / lower price was offered	1	1.6
	Total	63	100.0

Q21. Do You currently manage your GSH account Online?			
		Frequency	Percent
	No	57	57.0
	Yes	43	43.0
	Total	100	100.0

Q22. Have you been able to access all the services you need from Greater Sudbury Hydro during the COVID pandemic?			
		Frequency	Percent
	Yes	90	90.0
	No	10	10.0
	Total	100	100.0

IF NO ASK Q23 / YES SKIP TO Q24

Q23. What services have you not able to access?			
		Frequency	Percent
	Billing inquiries	3	30.0
	Information / assistance with relief programs	3	30.0
	Outage information / update	2	20.0
	Payment deferrals	1	10.0
	Energy conservation program information	1	10.0
	Total	10	100.0

Q24. 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...			
		Frequency	Percent
	1-very poor	2	2.0
	2-poor	7	7.0
	3-satisfactory	21	21.0
	4-good	55	55.0
	5-very good	14	14.0
	Don't know	1	1.0
	Total	100	100.0

Q25. What is your preferred method to have Greater Sudbury Hydro communicate information to you?			
		Frequency	Percent
	E-mail from the company	65	65.0
	Social media, such as Facebook or Twitter	13	13.0
	Bill inserts	12	12.0
	Greater Sudbury Hydro Website	5	5.0
	Direct mail	4	4.0
	Newspaper advertising	1	1.0
	Total	100	100.0

Q26. And as a customer, what is your preferred method that you would like to communicate with Greater Sudbury Hydro?			
		Frequency	Percent
	Email	70	70.0
	Telephone	22	22.0
	Social media	6	6.0
	Link or form on Greater Sudbury Hydro Website	2	2.0
	Total	100	100.0

Q27. Have you visited the Greater Sudbury Hydro website within the past 12 months?			
		Frequency	Percent
	Yes	66	66.0
	No	34	34.0
	Total	100	100.0

IF YES ASK Q28 / NO SKIP TO Q31

Q28.How would you rate the quality of the information provided on the Greater Sudbury Hydro website?			
		Frequency	Percent
	1-very poor	1	1.5
	2-poor	4	6.1
	3-satisfactory	11	16.7
	4-good	37	56.1
	5-very good	13	19.7
	Total	66	100.0

Q29. What information did you look for?				
		Responses		Percent of Cases
		N	Percent	
	Account information	26	32.1%	39.4%
	Rates & Fees	17	21.0%	25.8%
	Corporate info	3	3.7%	4.5%
	Energy conservation	17	21.0%	25.8%
	News or Developments	6	7.4%	9.1%
	Contact information	1	1.2%	1.5%
	Outages	5	6.2%	7.6%
	Report an issue	2	2.5%	3.0%
	Payment deferrals / Covid-19 support programs	4	4.9%	6.1%
Total		81	100.0%	122.7%

Q30. Did the website provide you with the information you were seeking?			
		Frequency	Percent
	Yes	50	75.8
	No	16	24.2
	Total	66	100.0

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 you would rate the overall quality ...			
		Frequency	Percent
	1-very poor	2	2.0
	2-poor	2	2.0
	3-satisfactory	14	14.0
	4-good	39	39.0
	5-very good	33	33.0
	Don't know	10	10.0
	Total	100	100.0

Q32. Using a scale from one very poor to five very good, how would you rate how easy it is to read and understand your electricity or utility bill?			
		Frequency	Percent
	1-very poor	3	3.0
	2-poor	3	3.0
	3-satisfactory	11	11.0
	4-good	49	49.0
	5-very good	34	34.0
	Total	100	100.0

Q33.What can Greater Sudbury Hydro do to better service its customers?		
	Frequency	Percent
Lower rates	29	29.0
Maintain rates / no increases / freeze	27	27.0
Don't know	20	20.0
Information on what is involved in the price of hydro	6	6.0
Be easier to reach	6	6.0
Bill / payment relief / flexibility during Covid-19	4	4.0
Make bills easier to understand / clearer	2	2.0
Better communication	1	1.0
No interruptions / outages	1	1.0
More information on how to save / conserve energy	1	1.0
Improve the website / make it more user friendly	1	1.0
Incentives / programs for reducing electricity	1	1.0
Fewer outages / quicker response to outages	1	1.0
Total	100	100.0