



# Annual Customer Satisfaction Survey Report



December 2021

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# 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 2021 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 2021 period. In each of these (N=9) 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 2021 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. A separate Excel report contains the results by individual question.

## 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
<b>TOTAL</b>	<b>N=500</b>

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 29<sup>th</sup> to December 8<sup>th</sup>, 2021.

## Confidence

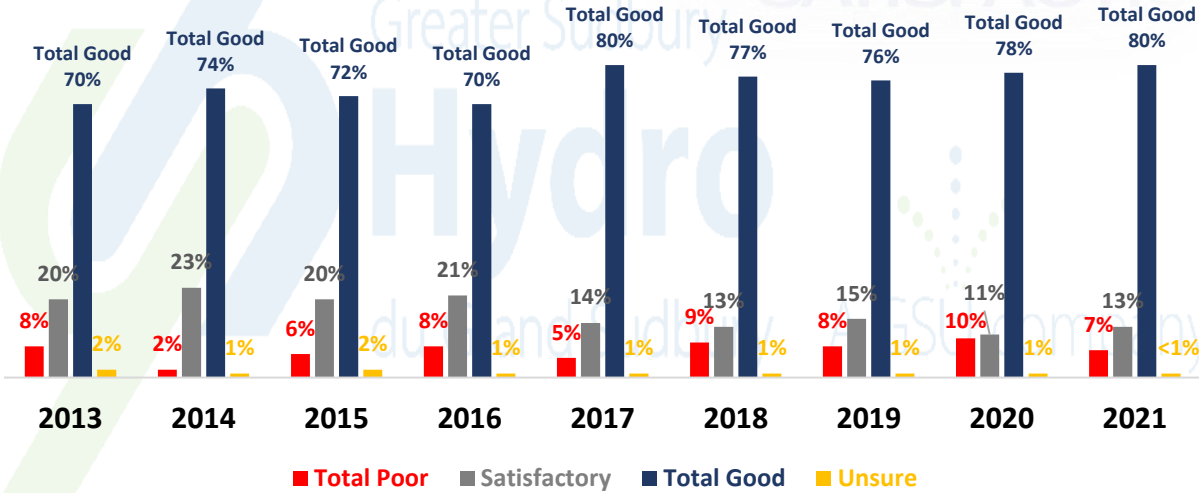
The margin of error for the N=400-person residential survey is  $\pm 4.9\%$ ,  $\frac{19}{20}$  times and  $\pm 9.8\%$ ,  $\frac{19}{20}$  times for the sample of N=100 businesses.

# EXECUTIVE SUMMARY – RESIDENTIAL

## Satisfaction

Residential customers were first asked an overall satisfaction question. The following graph compares the December 2021 results with the previous eight 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
<b>Male</b>	6%	14%	80%	<1%
<b>Female</b>	8%	11%	81%	<1%

	Total Poor	Satisf.	Total Good	Unsure
<b>18-34</b>	12%	17%	71%	-
<b>35-44</b>	6%	16%	79%	-
<b>45-54</b>	6%	9%	84%	1%
<b>55-64</b>	9%	9%	82%	-
<b>65+</b>	1%	12%	87%	-

	Total Poor	Satisf.	Total Good	Unsure
<b>Under \$50,000</b>	11%	12%	76%	-
<b>\$50,000 - \$74,999</b>	5%	15%	80%	1%
<b>\$75,000 - \$99,999</b>	4%	7%	89%	-
<b>\$100,000 or more</b>	5%	16%	79%	-

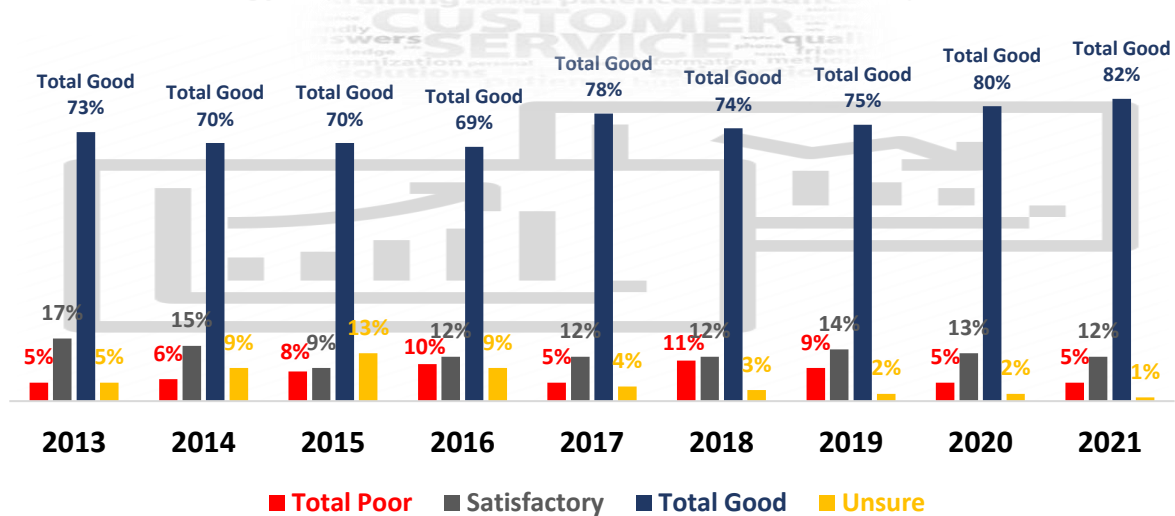
The total good (38%) and very good (42%) rating stands at 80%, up +2% from 2020, while 13% gave a “3” satisfactory score (+2%). The poor (2%) and very poor (5%) mark remains low at 7%, decreasing -2% over the previous survey period.

Satisfaction as evidenced by the total good score was highest among those 45-54, 55-64 and 65+ and with combined household incomes of \$75,000-\$99,999.

# 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	7%	19%	75%	-
35-44	3%	14%	80%	2%
45-54	1%	7%	91%	1%
55-64	6%	15%	79%	-
65+	5%	6%	89%	-

	Total Poor	Satisf.	Total Good	Unsure
Under \$50,000	10%	16%	73%	1%
\$50,000 - \$74,999	4%	4%	92%	-
\$75,000 - \$99,999	2%	6%	91%	1%
\$100,000 or more	2%	9%	86%	3%

Customers continue to view the customer service of Greater Sudbury Hydro more favourably in relation to other providers. Eighty-two percent gave a good (38%) or very good (44%) rating, up +2% compared to 2020, and the highest to date.

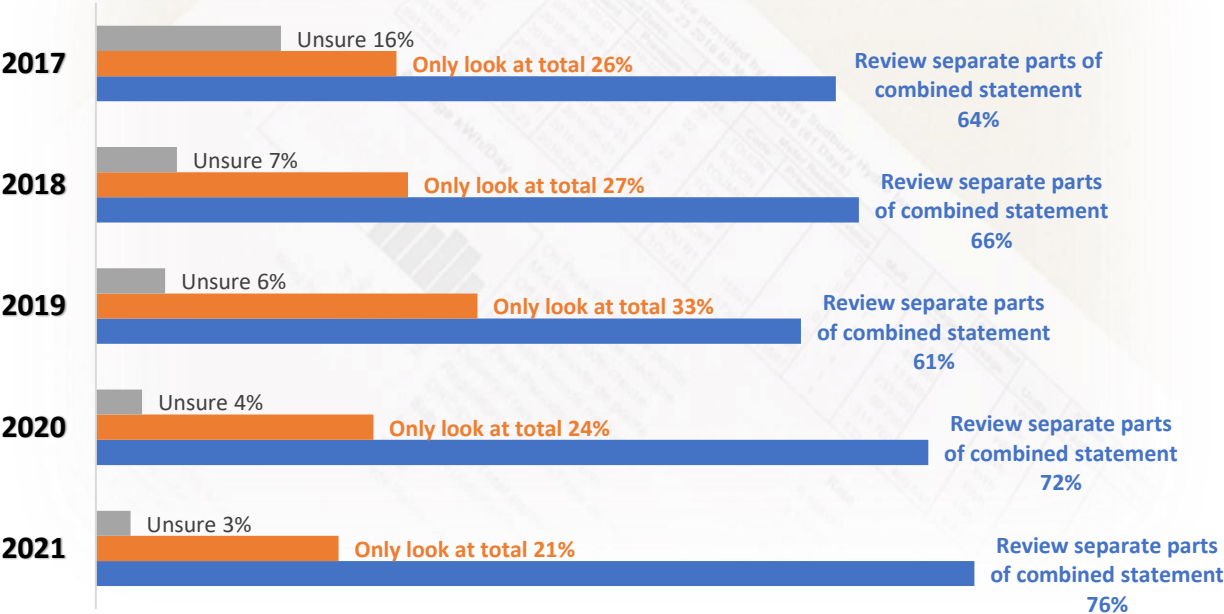
Females, mid-aged 45–54-year old's and middle-income earners in the \$50,000-\$74,999 and \$75,000-\$99,000 cohorts provided the highest good and very good ratings.

# 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 2021 survey period resulted in more customers reviewing the separate parts of their bill. More than three-quarters or 76% said they reviewed separate parts of the bill, a +4% increase compared to 2020. Results below reveal that interest in reviewing their bill in detail is driven by age.

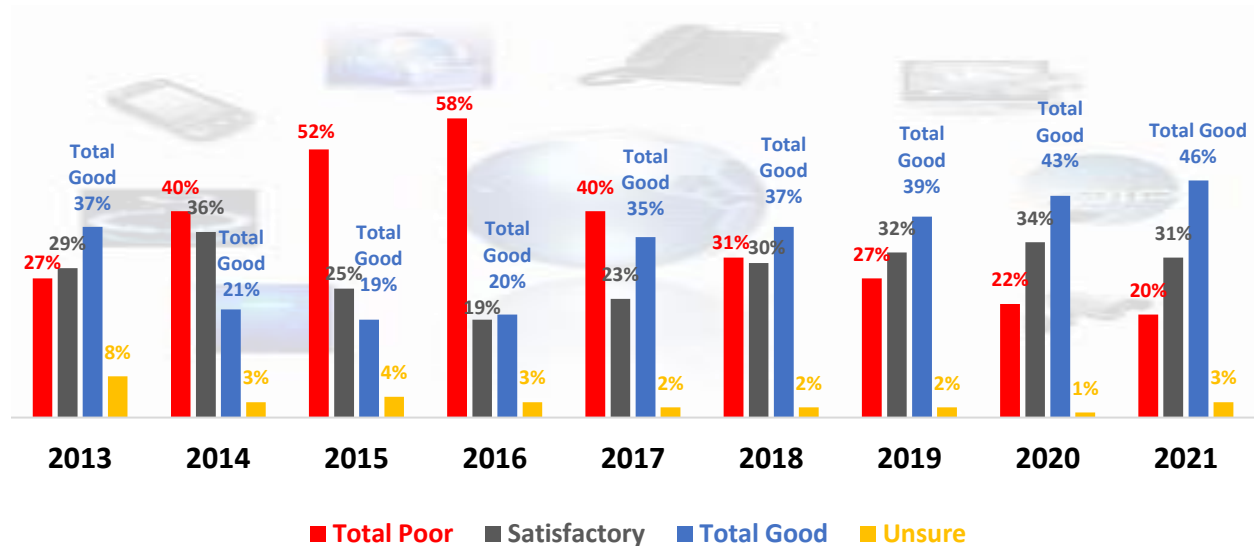
	<b>1-review separate parts of combined statement</b>	<b>2-only look at total</b>	<b>Don't know</b>
18-34	51%	41%	8%
35-44	69%	28%	3%
45-54	87%	10%	3%
55-64	91%	7%	1%
65 and over	91%	9%	

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)?”*

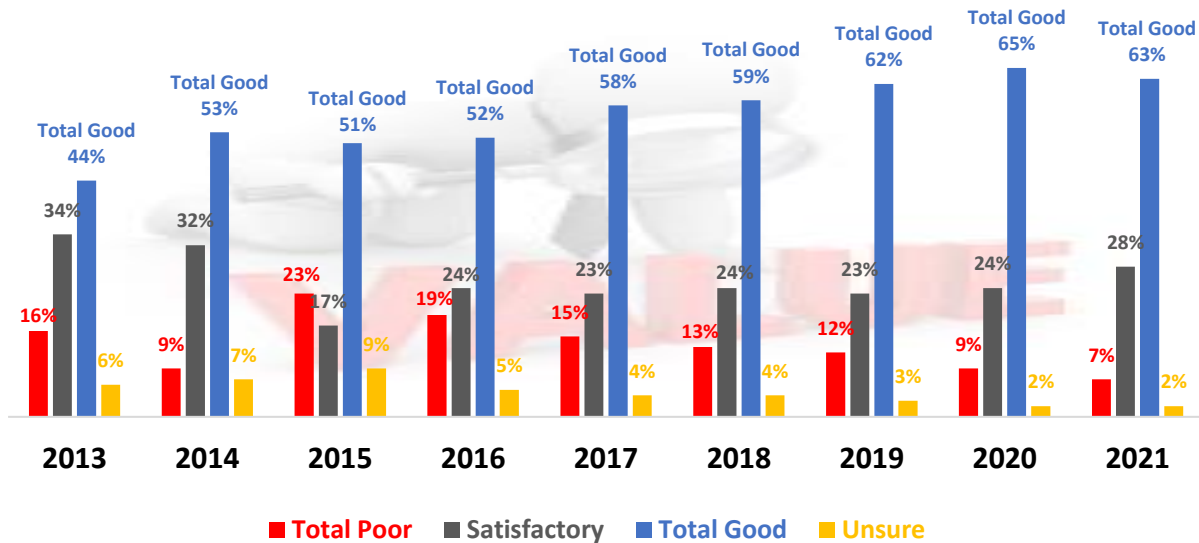


Forty-six percent gave a good or very good score, up +3% over 2020, and continuing the increase starting in 2017. The number of satisfactory responses decreased -2% to 31% and -2% fewer rated their satisfaction as poor or very poor.



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 dropped slightly -2% to 63%. The total poor score also fell by -2%, while the satisfactory rating increased +4% to 28%.

# 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	2021	
Q6. Greater Sudbury Hydro provides customers with reliable and good service.	77%	75%	73%	72%	79%	82%	82%	84%	85%	↑
Q7. Greater Sudbury Hydro is committed to effectively managing a balanced budget.	25%	33%	32%	29%	30%	40%	37%	32%	30%	↓
Q8. Greater Sudbury Hydro meets its commitment to customers.	80%	76%	75%	73%	78%	79%	81%	83%	84%	↑
Q9. GSH provides its customers with information about programs to help reduce their energy costs.	58%	71%	61%	59%	65%	72%	68%	63%	60%	↓
Q10. Greater Sudbury Hydro is concerned about public safety and safe work practices.	48%	63%	54%	60%	62%	63%	62%	60%	68%	↑
Q11. Greater Sudbury Hydro encourages efficient use of electricity among its customers.	62%	72%	74%	71%	75%	80%	74%	67%	62%	↓

GSH rated highest in terms of total agreement for providing customers with good service at 85% an increase of +1% over 2020, very closely followed by meeting its commitment to customers at 84%, also improving by +1%. Being concerned about public safety and safe work practices came in with the third highest agreement at 68% and witnessed the highest increase over 2020 (+6%).





Lower agreement was provided for the two indicators related to energy efficiency, namely encouraging the efficient use of electricity (62%) and providing information about programs to reduce costs (60%) that saw results drop -5% and -3% respectively.

The question on being committed to effectively managing a balanced budget had the lowest percentage of agree or strongly agree responses at 30% (-2%), while 45% 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	2021	
Q12. The reliability of power supply	83%	92%	90%	88%	89%	82%	85%	88%	86%	
Q13. Prompt responses to power outages when they occur	72%	82%	81%	84%	86%	80%	78%	80%	82%	
Q14. Effectively scheduling planned power outages	57%	54%	66%	64%	70%	68%	65%	63%	67%	
Q15. Effectively communicating with customers about planned power interruptions in your area	55%	56%	68%	66%	63%	61%	60%	54%	60%	

Despite a small drop (-2%), the highest rated performance indicator remains the one related to the reliability of the power supply at 86%.

Next best scored was the area of promptly responding to outages at 82%, up slightly +2% compared to the previous wave.

While effectively scheduling planned power outages rated lower at 67% there was a +4% improvement. There was also a +6% boost to 60% for the lowest scored indicator about effectively communicating with customers about planned power interruptions.

# 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	2021
1-lowest rates – regular outages	2%	4%	4%	3%	2%	1%	2%	4%	5%
2-low rates – occasional outages	15%	3%	8%	7%	5%	6%	10%	11%	12%
3-neutral – a balance between rates and outages	44%	55%	47%	54%	59%	61%	58%	62%	65%
4-high rates – only a few outages	15%	13%	11%	12%	11%	13%	12%	8%	7%
5-highest rates – no outages	3%	5%	6%	5%	8%	7%	4%	6%	5%
Don't know	22%	21%	24%	19%	15%	12%	14%	9%	6%

There is a continued increase in the percentage of customers that want a balance between rates and outages at 65%, +3% higher compared to 2020.

Seventeen percent of customers are willing to tolerate some form of outages (1 & 2 combined) for lower rates (+2% in relation to 2020) with 12% saying low rates with occasional outages and 5% the lowest rates and regular outages (+2%).

On the other hand, -1% fewer or 13% want diminished outages for some form of higher rates (4 & 5 combined) as 7% said high rates and no outages and 5% the highest rates and no outages (+2%). The number of undecided's also fell -3% to 6%.

# Payment Options & Online Management

Customers were asked about their preferred method of paying their utility bill. One response was accepted.

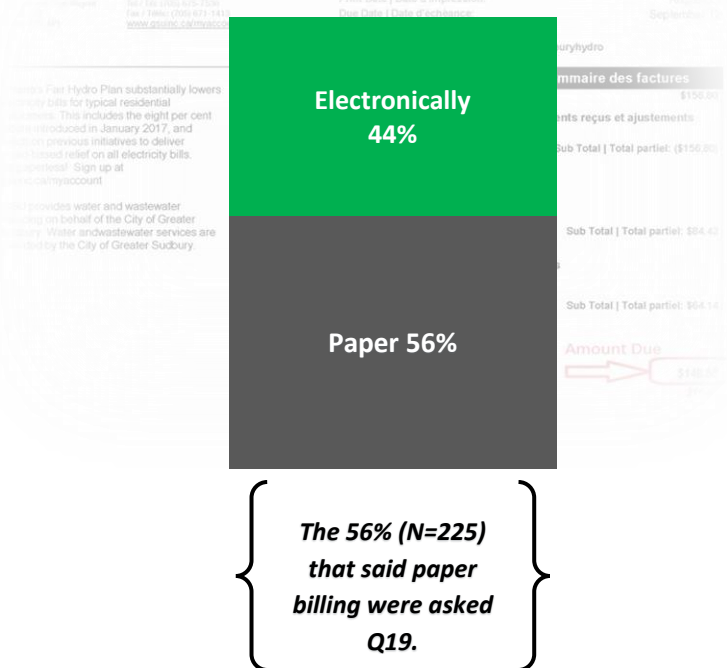
**Q17. "What is your preferred method of paying your bill?"**

	2019	2020	2021
Online/telephone banking through financial institution	64%	67%	64%
Automatic withdrawal from bank account (variable payment)	22%	21%	19%
Equal monthly payment plan (automatic withdrawal)	9%	10%	13%
Credit card	NA	NA	2%
Online at Sudbury Hydro Website	3%	1%	2%
Payment at the Greater Sudbury Hydro office	3%	1%	NA

Online banking remains the preferred method of paying bills by 64%, followed by 32% that named automatic withdrawal (19%) and equal monthly payments (13%).

Customers were then asked how they receive their bill from Greater Sudbury Hydro.

**Q18. "How do you currently receive your electricity bill from Greater Sudbury Hydro?"**



Forty-four percent of respondents to the survey said they now get their bill electronically, up 10% from 2020 and 21% from the onset of the pandemic in 2019.

E-bills are most used by 18-34 (66%), 35-44 (57%) and 45-54 (47%) year old's, and least by those 55-64 (30%) and 65+ (18%).

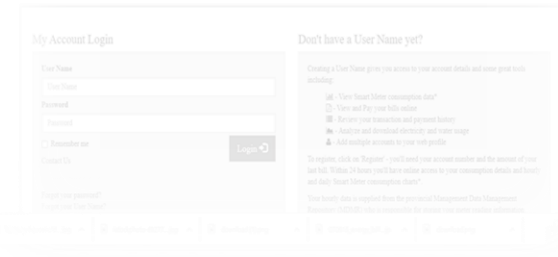
Respondents that said they receive a paper bill in Q18 (56%, N=225) were then asked an open-ended or unaided follow-up about what would get them to move to paperless billing.

**Q19. "What would most convince you to move to electronic or paperless billing?"**

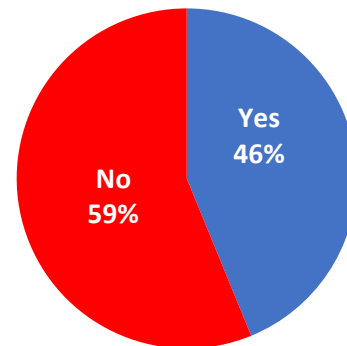
Everything is going online / no choice	16%
Don't know	12%
Offer the option / let customers know of option	11%
It would use less paper	10%
If it would have more information in it (details)	9%
Nothing no interest	9%
I plan to, just haven't done it yet	9%
If it would be easier / more convenient	8%
If i could receive bill quicker / on time	5%
If easy to set up / access	2%
As long as it is secure	2%
Better for environment	2%
If a discount / lower price was offered	1%
Nothing I prefer a hard copy	1%
If past bills can be accessed	1%
If i can view on phone	<1%

Only 10% expressed unwillingness to consider paperless billing (no interest, nothing), while 12% were unsure. One-quarter answered that they will have no choice to switch to online (16%) or that they just have not got around to it yet (9%). Other responses varied and included letting customers know about the option, using less paper, convenience, making the set up easy and security.

All N=400 customers were then asked if they manage their GSH account online of which 46% said they do. This compares to 41% in 2020 and 38% in 2019.



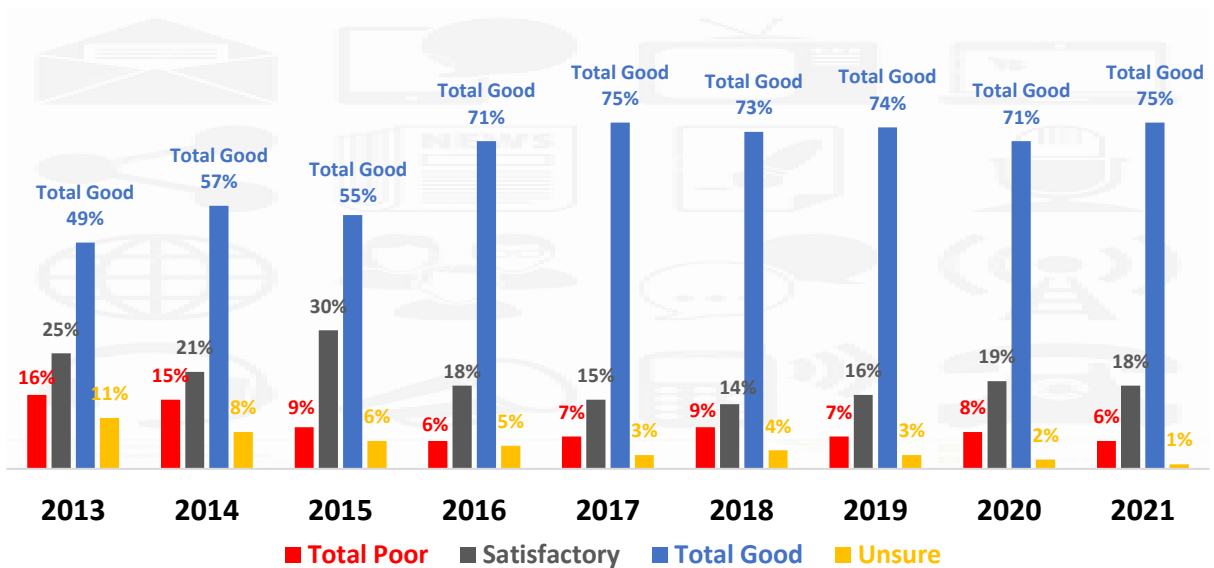
**Q21. "Do You currently manage your GSH account Online?"**



# Communication

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

*Q21. "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."*



**Total Good Response**

Male	74%
Female	76%

**Total Good Response**

18-34	69%
35-44	73%
45-54	75%
55-64	77%
65+	86%

**Total Good Response**

Under \$50,000	76%
\$50,000 - \$74,999	85%
\$75,000 - \$99,999	72%
\$100,000 or more	77%

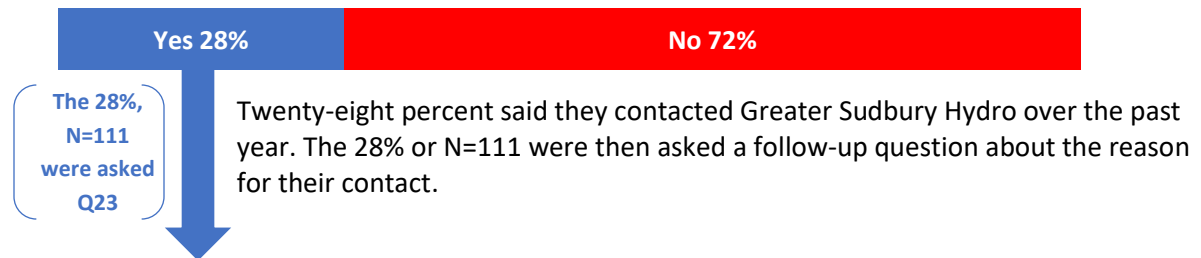
There was a +4% increase in the positive (good & very good) rating for communicating with customers in relation to 2020, with 75% providing a total positive score.

Older customers especially those 65+ provided the highest good and very good score as did those in the mid to lower \$50,000-\$74,999 cohort, while there was no significant gender split.

# Contact

In a new series of indicators, all N=400 respondents were asked about their recent contact with Greater Sudbury Hydro and communications with the utility. They were first asked if they have contacted Greater Sudbury Hydro in the past 12 months.

*Q22. "Over the past 12 months, have you contacted Greater Sudbury Hydro / Greater Sudbury Utilities?"*



Twenty-eight percent said they contacted Greater Sudbury Hydro over the past year. The 28% or N=111 were then asked a follow-up question about the reason for their contact.

**Q23. "What was the nature of your inquiry?"**

Billing issues / inquiry	38%
Outages / information	32%
Open or close account	14%
Change payment options / deferral	5%
Streetlights	4%
General inquiry	3%
Energy savings program	3%
Tree cutting	1%
Line locate	1%

Reasons for contacting Greater Sudbury Hydro related primarily to billing issues / inquiries and areas around outages or information about power interruptions.

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

**Q24. "How would you like to communicate with Greater Sudbury Hydro?"**

Email	47%
Telephone	28%
Social media	18%
Website form	3%
Texts	2%
Don't know/no preference	1%
Regular mail	<1%

Email is the preferred method (47%) customers want to communicate with Greater Sudbury Hydro, next by telephone (28%) and then social media (18%).



A new question asked customers to identify the communication option they would like to see Greater Sudbury Hydro offer.

*Q25. "What communication option would you like to see Greater Sudbury Hydro offer in the future?"*

Email	43%
Automated Chat/Virtual Assistant	18%
Text/SMS notifications	11%
Unsure	10%
Automated voice message	8%
Live Chat	7%
None	3%

Email was once again most named by 43%, while there was then interest in a wide range of options including automated chat (18%), text/SMS notifications (11%), automated voice messaging (8%) and live chat (7%).

# Greater Sudbury Hydro Website

A series of four questions were asked about the Greater Sudbury Hydro / Greater Sudbury Utilities website.

Q26. "Have you visited the Greater Sudbury Hydro or the Greater Sudbury Utilities website over the past 12 months?"

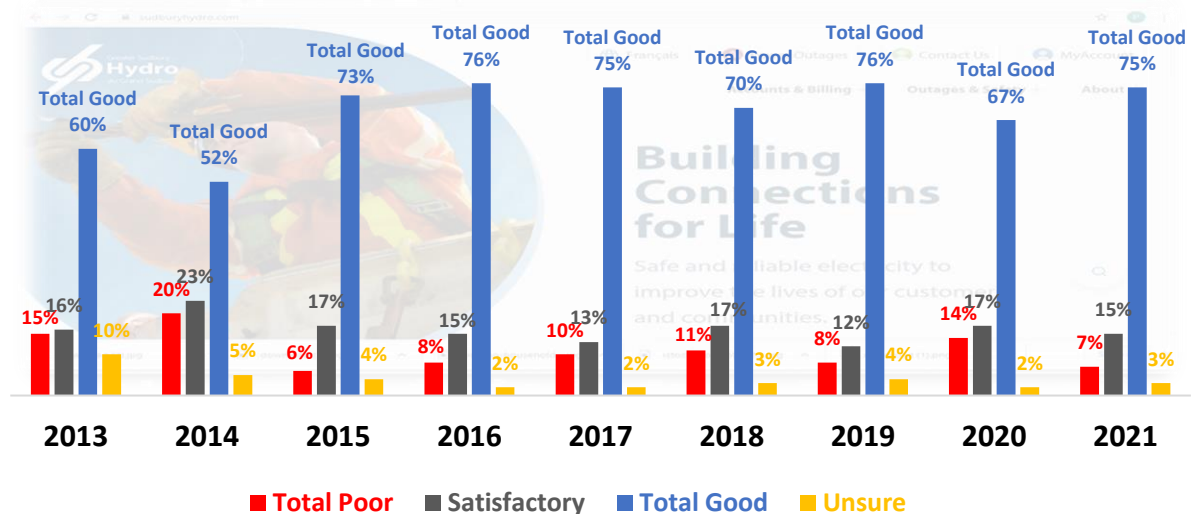
**53% Yes**  
(+5%)

Fifty-three percent said they have visited the website(s) in the last year, up from 48% in 2020 and 38% in 2019.



The 53% (N=213) that visited the site(s) were then asked three follow up questions on the information that the website(s) contain. In the first, they were asked to rate the quality of the information provided.

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



The total good and very good score for the quality of the information provided is 75% and back to its 2019 level after dropping in 2020.

The N=213 (53%) of website visitors were then asked about the information they were looking for. Multiple responses were accepted and below are the percent of cases or the percentage of respondents naming each individual category.

<i>Q28. "What information did you look for?"</i>	
Account information / billing / payments	47%
Energy conservation / programs / save money	26%
News or Developments	16%
Rates & Fees	14%
Outages / safety	13%
Environment/Safety	5%
Contact information	4%
Corporate info	2%
Don't know	<1%

Most website visitors were seeking information about their account, next followed by energy conservation, general news, rates, and outages.

In the final website question, the N=213 visitors were asked if they found the information on the website they were looking for. Seventy-three percent said yes or that they found the information, compared to 71% in 2020 and 82% in 2019.

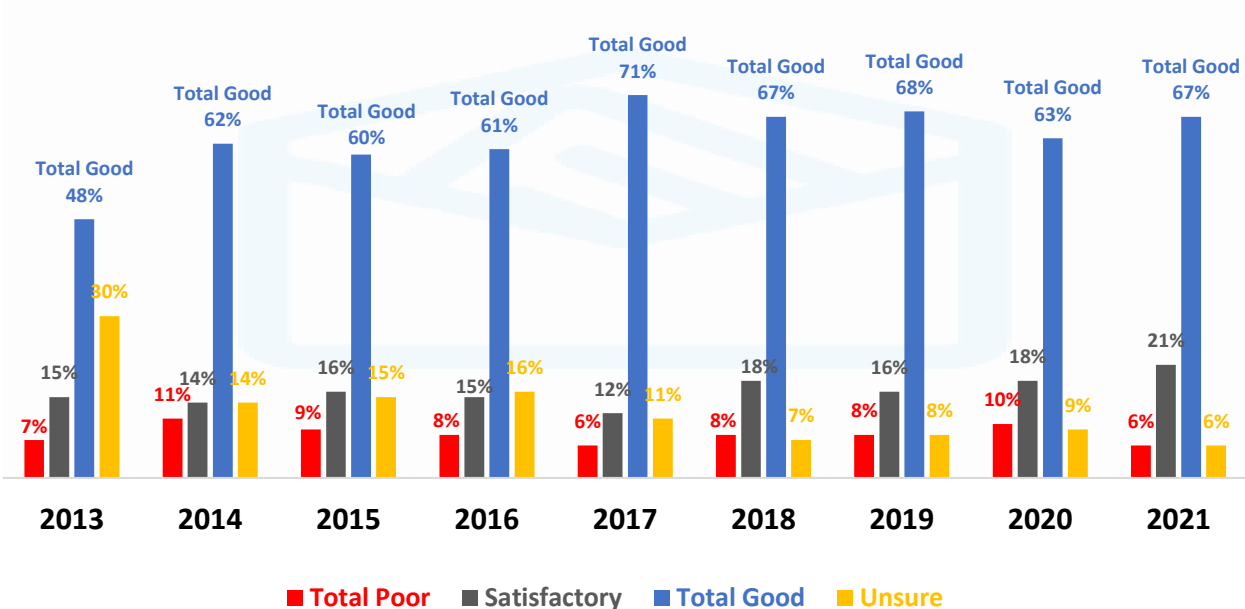


**73% Yes**  
**(+2%)**

# Rating Bill Inserts & Links

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

Q30. *“From time to time, Sudbury Hydro attaches information to your bill in the form of a bill insert, or for electronic bills, in the form of a link. Using a scale from one very poor to five very good, how you would rate the overall quality of the material you have received from Greater Sudbury Hydro? “*

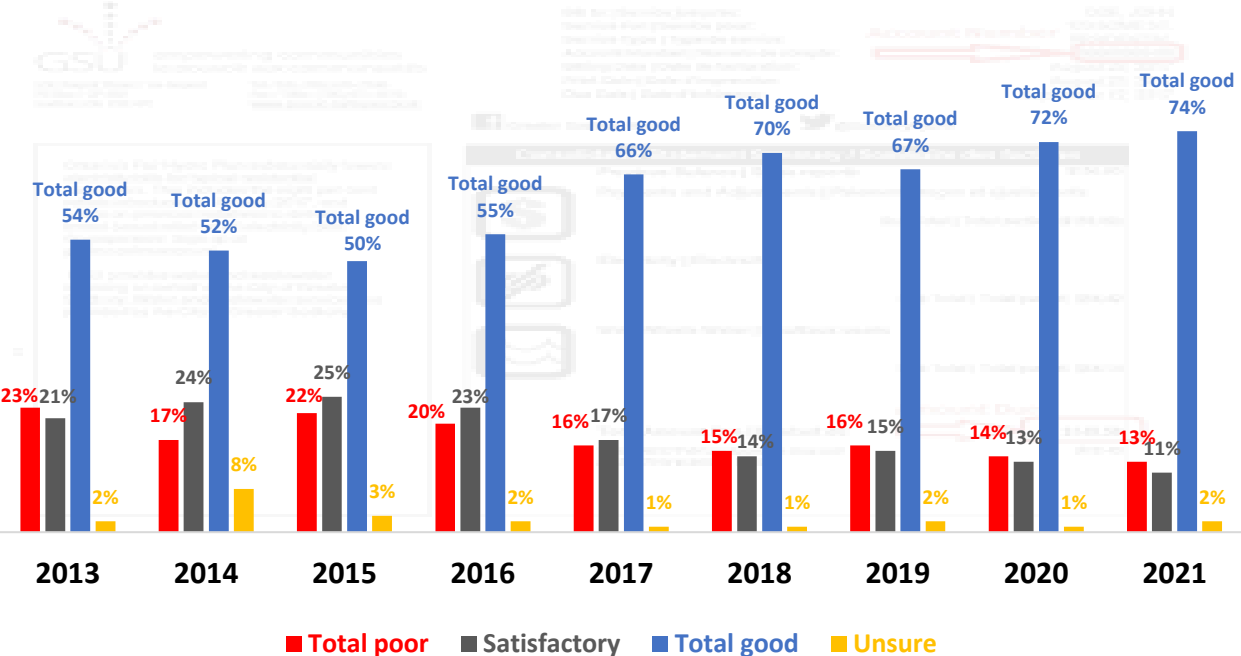


Four percent more or 67% (63% in 2020) provided a good or very good rating for the overall quality of bill inserts or electronic link information provided.

# Billing – Ease of Understanding

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

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



Almost three-quarters of customers or 74% provided a good or very good rating for the ease of understanding their bills, +2% higher than they did in 2020.

## Improvement Comments

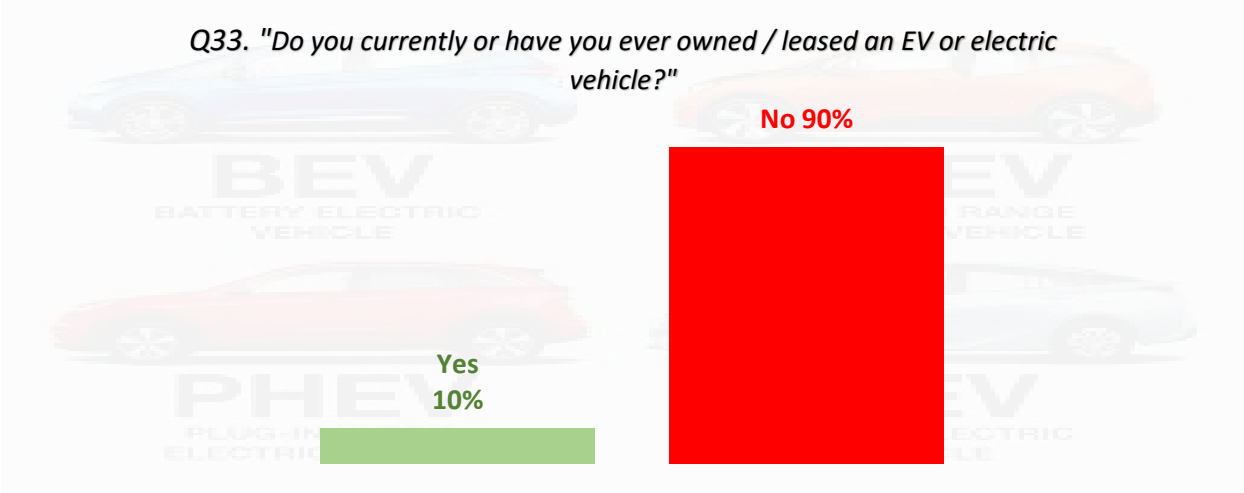
In an open-ended or unaided question, all residential customers were probed about what they felt Greater Sudbury Hydro could do to better service its customers. Most responses as illustrated below, related to cost issues including lower rates, maintaining them, and providing customers with solutions and incentives on how to save energy/money.

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

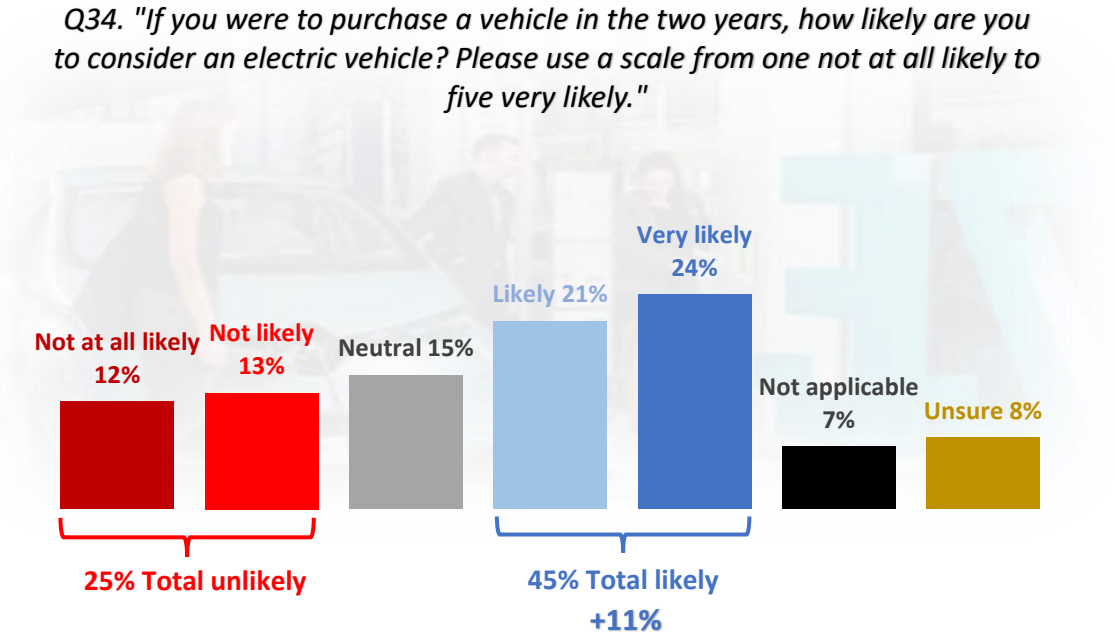
Don't know	30%
Lower rates	29%
Maintain rates / no increases / freeze	7%
Incentives / programs for reducing electricity	7%
More information on how to save / conserve energy	6%
Fewer outages / quicker response to outages	5%
Explain cost of energy on bills	4%
No interruptions / outages	2%
Information on what is involved in the price of hydro	2%
Make bills easier to understand / clearer	2%
More information on alternative energy options	1%
Be easier to contact	1%
Better communication	1%
Improve customer service	1%
Invest in alternative energy sources	1%
Lower delivery fees	1%
Improve the website / make it more user friendly	1%

# Electric Vehicles

The following two indicators asked to all (N=400) customers were about electric vehicles. In the first probe, they were questioned if they have ever owned or leased an electric vehicle of which 10% said yes.



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

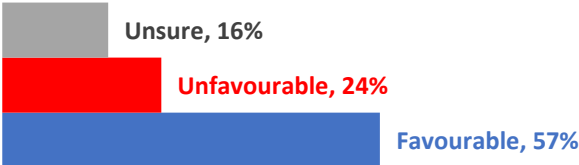


Forty-five percent said they are likely (21%) or very likely (24%) to consider the purchase of an electric vehicle over the next 24 months, an +11% increase compared to 2020.

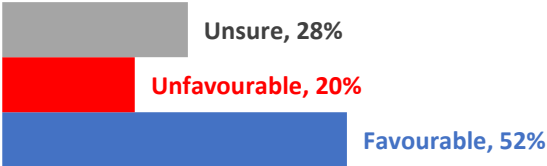
# Energy Self Generation & Storage

The final set of questions asked all N=400 respondents about their opinions of energy self generation and storage. They were first asked if they had a favourable or unfavourable opinion of each.

*Q35. Do you have a favourable or unfavourable opinion of energy self-generation such as solar panels, to meet, offset, or lower your energy consumption and costs?*



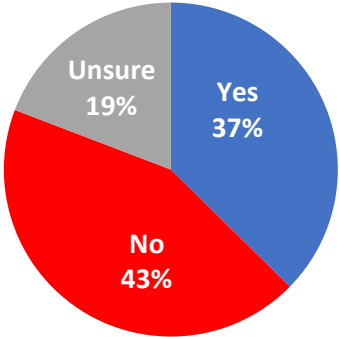
*Q36. "Do you have a favourable or unfavourable opinion of energy storage or the ability to store electricity generated" from rooftop solar panels?*



A 57% majority have a favourable opinion of energy self generation that would lower their energy consumption and energy costs. Only 25% have an unfavourable view and 16% were unsure. A smaller majority or 52% said they have a favourable opinion of energy storage, but the unfavourable number drops to 20%, while a higher 28% were unsure or unaware of the technology.

When then asked if they would be interested in generating and storing some or all of the electricity needed for their residence, there was a split with 37% saying yes and 43% no. Almost two in ten were unsure or undecided.

*Q37. "Would you be interested in generating, and potentially storing, some or all of your electricity needed for your residence?"*





In a final open-ended question, all respondents were asked to explain what would motivate them to install an energy generation and storage system for their residence. Issues related to cost, expected payback, lower bills and financing the project were most named.

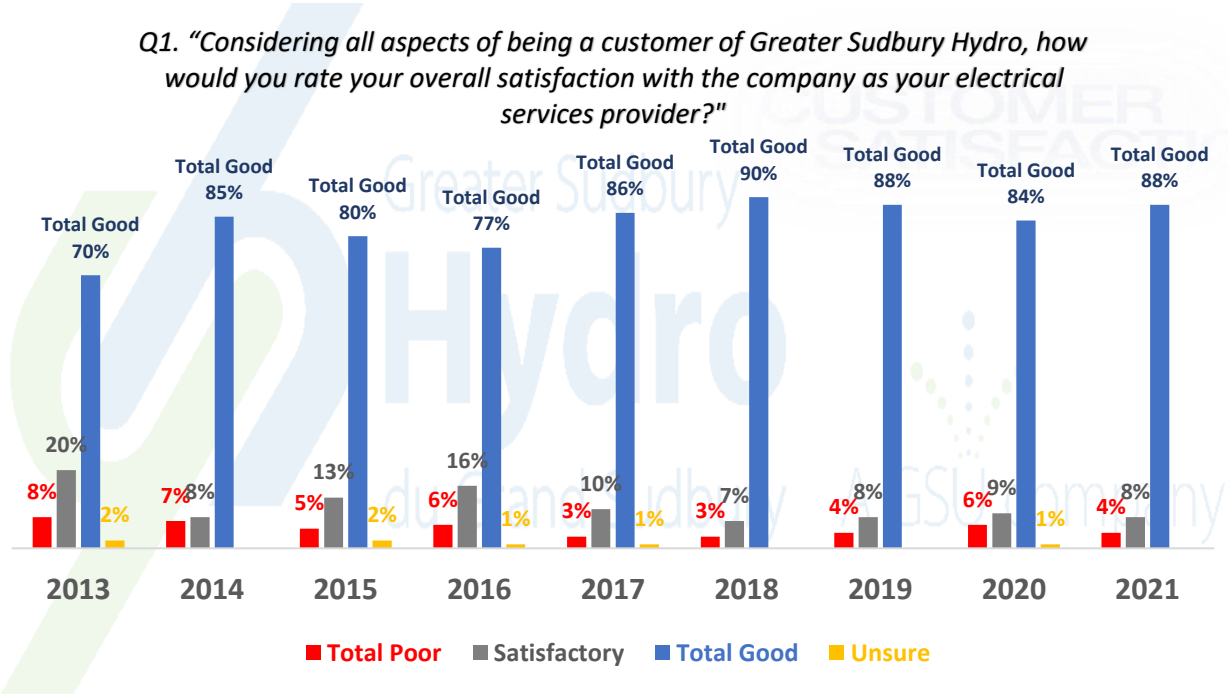
**Q38. *“What would motivate you to install an energy generation and or storage system for your residence?”***

Cost	25%
Nothing	23%
Unsure	21%
Lower utility bills	11%
What is the payback on investment	9%
Reliability	3%
Financing	2%
Need more information	2%
Help reduce GHG emissions	2%
Contractors (reputable)	1%
Impact on resale value	1%
If planned to stay in home	1%
Comfort	<1%

# EXECUTIVE SUMMARY – BUSINESS

## Satisfaction

Businesses were first asked an overall satisfaction question. The following graph compares the current 2021 results with the previous eight surveys. Results below combine the total poor (very poor & poor) and total good (good & very good) findings.

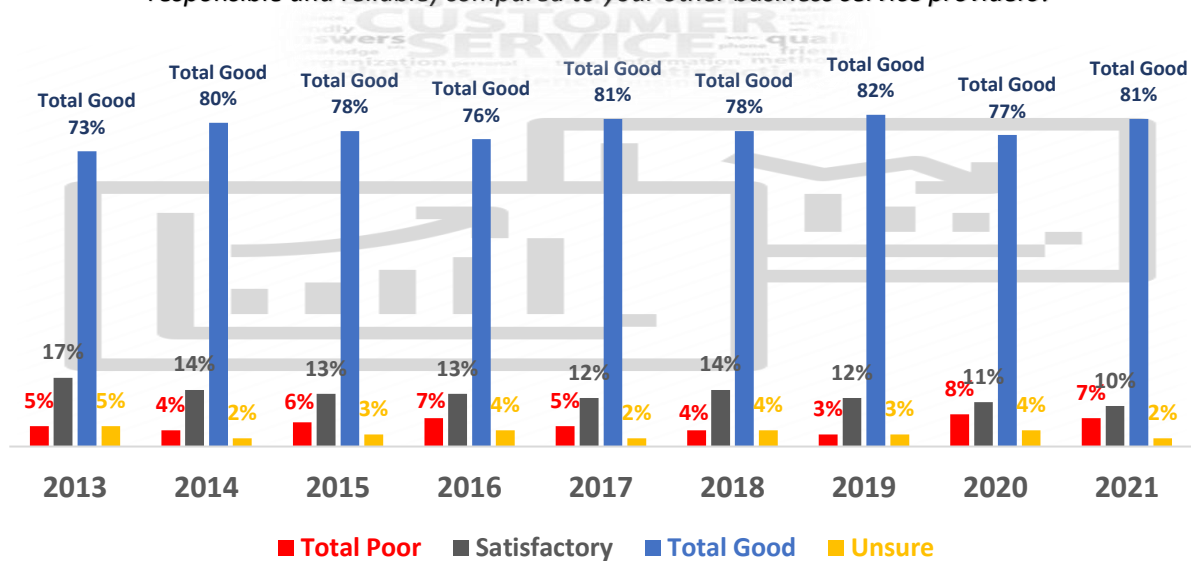


The overall satisfaction score as evidenced by the combined good and very good rating improved +4% over 2020 to 88%.

# 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?”*



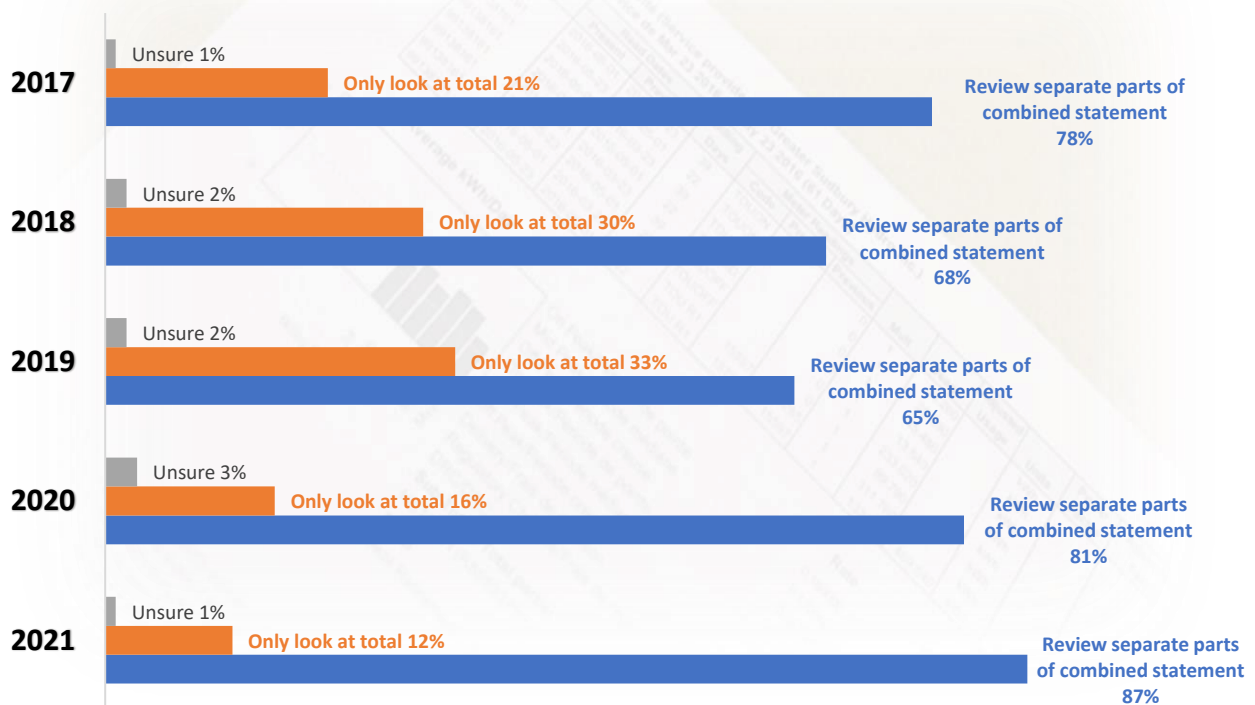
Among businesses, there was a +4% improvement in the comparative customer service score positive (good & very good) rating to 81% bringing the results in line with findings from 2019.

## 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?"*



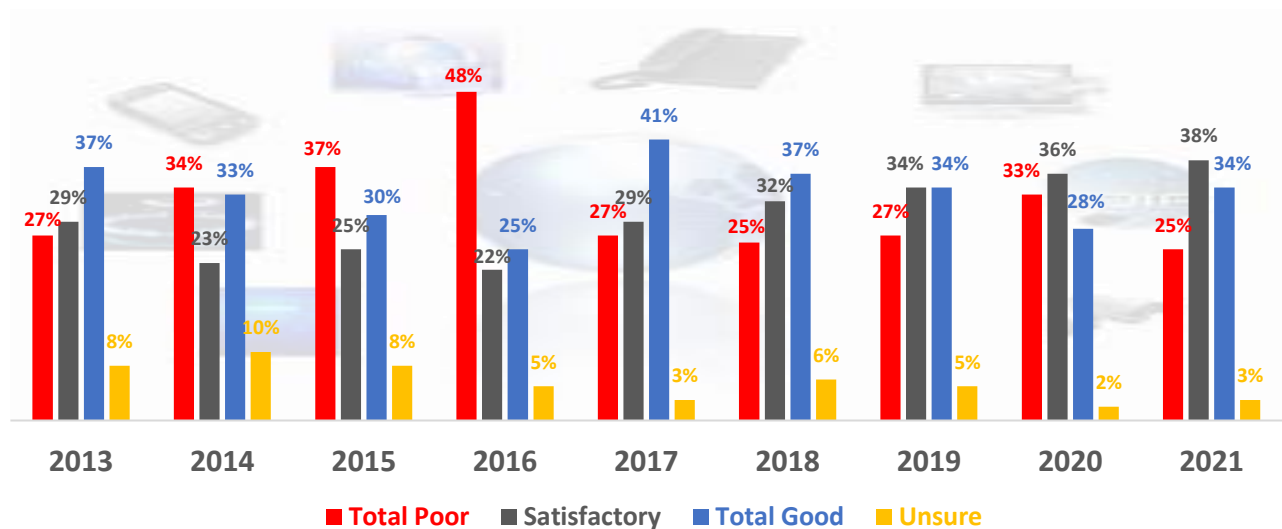
There was an increase of +6% in the number of businesses that are paying more attention to their bill or reviewing separate parts of the combined statement.

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.

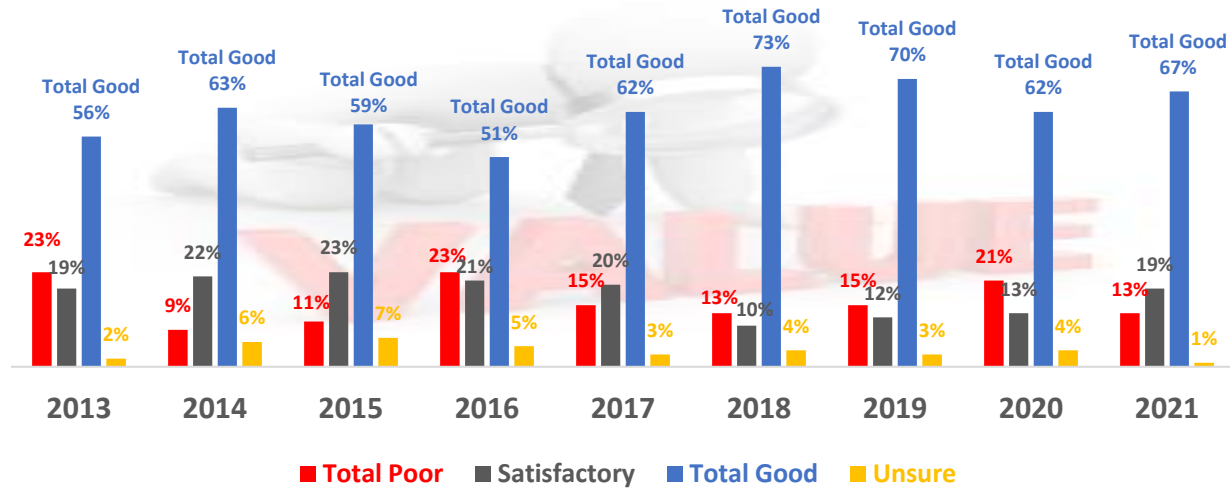
**Q4. “How would you rate your satisfaction with the price you pay for electricity compared to what you pay for other (essential) business services?”**



Satisfaction (good & very good ratings) with the comparative cost of electricity in relation to other essential services improved by +6% over 2020. The negative score decreased by -8%, while the number of businesses that provided a satisfactory rating increased (+2%). There were 3% unsure or that did not know.

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?”*



There was also an improvement with respect to the overall value that GSH provides, as 67% gave a good or very good score, +5% more than in the previous survey wave.

# 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	2021	
Q6. Greater Sudbury Hydro provides customers with reliable and good service.	69%	89%	85%	81%	84%	91%	90%	93%	94%	↑
Q7. Greater Sudbury Hydro is committed to effectively managing a balanced budget.	25%	21%	21%	19%	17%	27%	23%	20%	23%	↑
Q8. Greater Sudbury Hydro meets its commitment to customers.	69%	86%	83%	79%	85%	86%	80%	85%	87%	↑
Q9. GSH provides its customers with information about programs to help reduce their energy costs.	65%	71%	69%	76%	73%	70%	65%	54%	59%	↑
Q10. Greater Sudbury Hydro is concerned about public safety and safe work practices.	65%	58%	56%	64%	74%	72%	70%	56%	71%	↑
Q11. Greater Sudbury Hydro encourages efficient use of electricity among its customers.	55%	75%	71%	80%	82%	75%	73%	65%	69%	↑

The highest rated category in terms of agreement continues to be for Greater Sudbury Hydro providing good and reliable service at 94%, up +1% over 2020, followed by meeting its commitment to customers at 87%, also increasing +2%. Total agreement was next best for being concerned about public safety and safe work practices at 71%, an area that saw the largest improvement (+15%), and encouraging the efficient use of electricity at 69% (+4%). Agreement ratings were lower for providing customers with information / programs to reduce energy costs at 59% (+5%) and being committed to managing a balanced budget at 23% (+3%).

# 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	2021	
Q12. The reliability of power supply	91%	90%	87%	89%	86%	92%	91%	93%	90%	↓
Q13. Prompt responses to power outages when they occur	74%	73%	70%	72%	80%	82%	81%	86%	85%	↑
Q14. Effectively scheduling planned power outages	61%	59%	55%	41%	58%	53%	55%	51%	54%	↑
Q15. Effectively communicating with customers about planned power interruptions in your area	62%	53%	50%	40%	49%	45%	46%	47%	51%	↑

Although dropping slightly (-3%), highest scored once again was the reliability of power at 90%, followed by prompt response time to outages at 85% (-1%). While results improved, they remain lower for effectively scheduling planned outages at 51% (+3%) and for effectively communicating with customers about planned outages at 51% (+4%).



## 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	2021
1-lowest rates – regular outages	3%	4%	3%	3%	1%	1%	1%	2%	3%
2-low rates – occasional outages	6%	3%	5%	4%	2%	1%	1%	17%	11%
3-neutral – a balance between rates and outages	57%	58%	65%	69%	79%	75%	82%	76%	83%
4-high rates – only a few outages	12%	18%	14%	9%	7%	9%	8%	2%	1%
5-highest rates – no outages	9%	3%	2%	1%	2%	3%	2%	1%	1%
Don't know	13%	14%	11%	14%	9%	11%	6%	2%	1%

Most or 83% still want a balance between rates and outages, +7% more than in 2020. There was a -5% decrease to 14% in the number that want either low rates with occasional outages (11%) or the lowest rates with regular outages (3%). There was a slight drop in customers willing to accept high rates for a few outages (-1%).

# Payment Options & Online Management

Businesses were asked about their preferred method of paying their utility bill. One response was accepted.

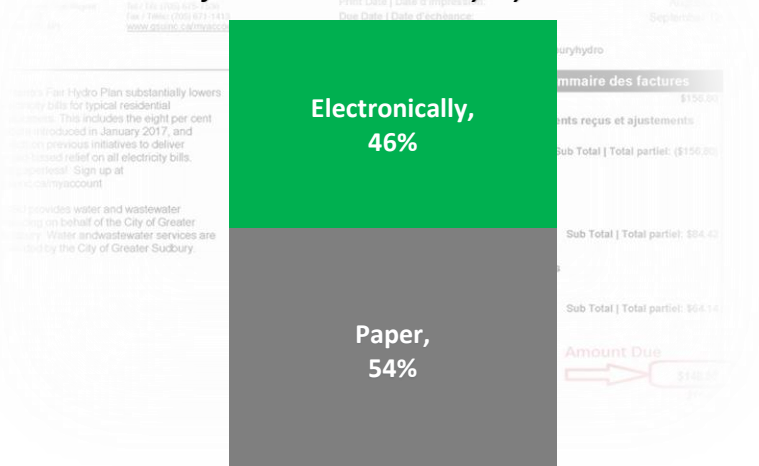
**Q17. "What is your preferred method of paying your bill?"**

	2019	2020	2021
Online/telephone banking through financial institution	66%	59%	65%
Equal monthly payment plan (automatic withdrawal)	21%	19%	17%
Automatic withdrawal from bank account (variable payment)	16%	15%	14%
Online at Sudbury Hydro Website	4%	6%	3%
Credit card	NA	NA	1%
Payment at the Greater Sudbury Hydro office	5%	1%	NA
Unsure	2%	-	-

Online banking remains the preferred method of paying bills by 65%, followed by 31% that named equal monthly payments (17%) and automatic withdrawal (14%).

Business customers were then asked how they receive their bill from Greater Sudbury Hydro.

**Q18. "How do you currently receive your electricity bill from Greater Sudbury Hydro?"**



Forty-six percent of businesses surveyed said they get a bill electronically, +9% higher than 2020 and +20% more compared to 2019.

**The 54% (N=54) that said paper billing were asked Q19.**

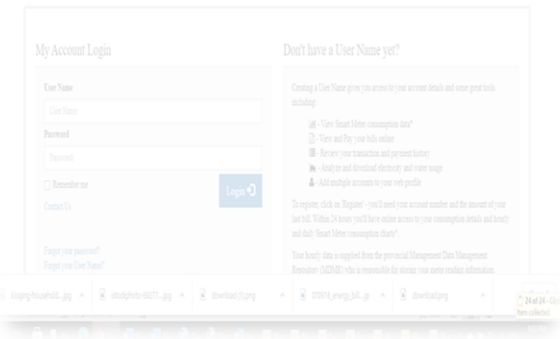
Respondents that said they receive a paper bill (54%, N=54) were then asked an open-ended or unaided follow-up about what would get them to move to paperless billing.

**Q19. "What would most convince you to move to electronic or paperless billing?"**

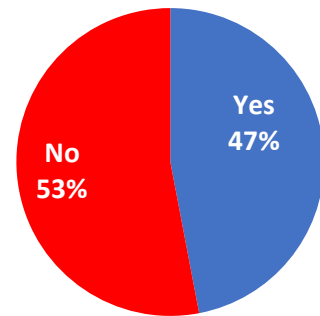
Everything is going online / no choice	19%
Offer the option / let customers know of option	15%
If it would be easier / more convenient	11%
If there was online security	11%
I plan to, just haven't done it yet	9%
If easy to set up / access	7%
Nothing no interest	7%
If past bills can be accessed	6%
Don't know	6%
If i could receive bill quicker / on time	4%
Nothing I prefer a hard copy	4%
If it would have more information in it (details)	2%

Comments reveal that there is a growing acceptance of online billing. They want to know more about e-bills, their benefits, and how the move over can be transitioned.

All N=100 business customers were then asked if they manage their GSH account online, of which 47% said yes (43% in 2020).



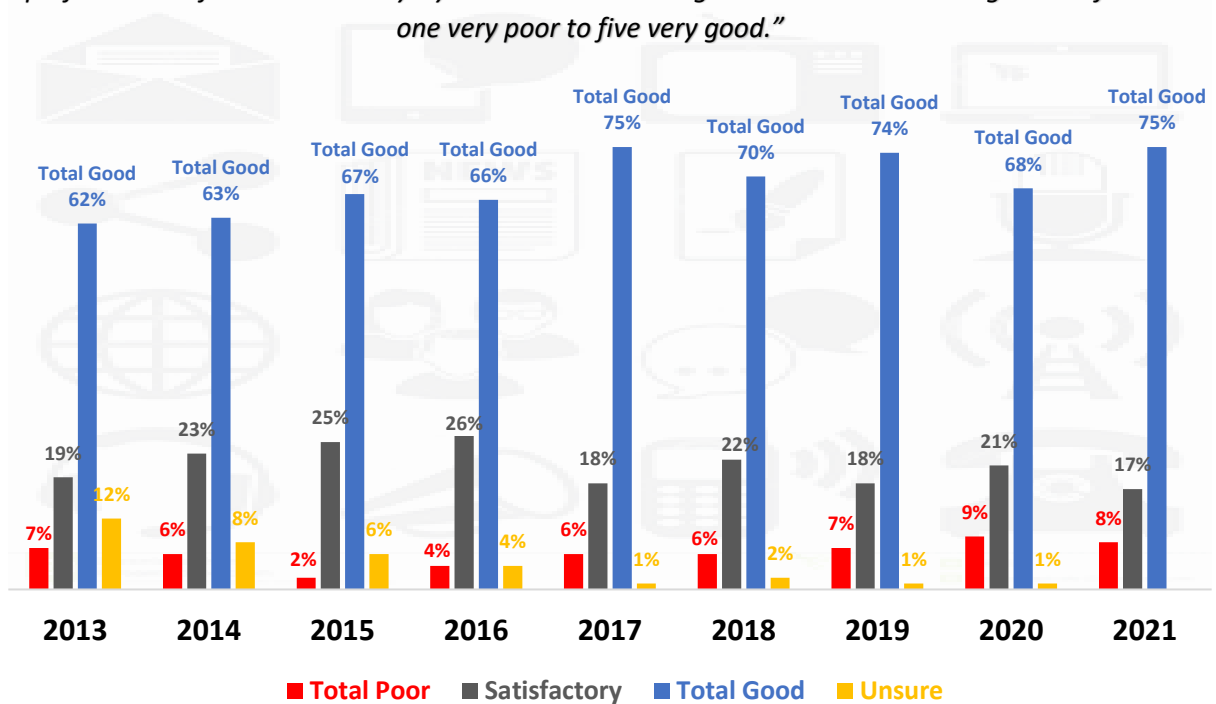
**Q20. "Do You currently manage your GSH account Online?"**



# Communication

Respondents were asked to rate how GSH communicates with its business customers.

Q21. "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."

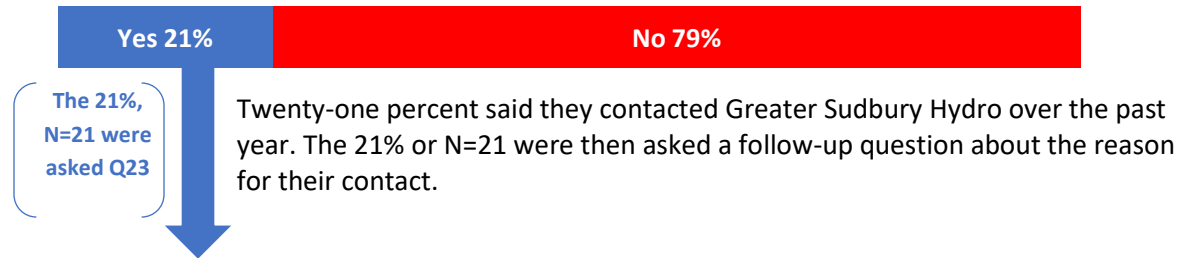


Three-quarters of businesses rated communications as being good or very good, an increase of +7% from 2020.

# Contact

In a new series of indicators, all N=100 respondents were asked about their recent contact with Greater Sudbury Hydro and their communications with the utility. They were first asked if they have contacted Greater Sudbury Hydro in the past 12 months.

*Q22. "Over the past 12 months, have you contacted Greater Sudbury Hydro / Greater Sudbury Utilities?"*



**Q23. "What was the nature of your inquiry?"**

Billing issues / inquiry	N=10	48%
Outages / information	N=6	29%
Open or close account	N=2	10%
General inquiry	N=1	5%
Energy savings program	N=1	5%
Change payment options / deferral	N=1	5%

Reasons for contacting Greater Sudbury Hydro related primarily to billing inquiries and areas around outages or information about power interruptions.

In a reworded open or unaided question, businesses were asked about how they would most like to communicate with Greater Sudbury Hydro.

**Q24. "How would you like to communicate with Greater Sudbury Hydro?"**

Email	64%
Telephone	30%
Website form	4%
Social media	2%

Email is the preferred method which 64% of business customers want to communicate with Greater Sudbury Hydro, next by telephone (30%).

A new question asked customers to identify the communication option they would like to see Greater Sudbury Hydro offer.

*Q25. "What communication option would you like to see Greater Sudbury Hydro offer in the future?"*

Email	60%
Automated Chat/Virtual Assistant	23%
Live Chat	9%
Text/SMS notifications	7%
Automated voice message	1%

Email was once again most named by 60%, while 23% were interested in automated chats, 9% live chats and 7% text notifications.

# Greater Sudbury Hydro Website

A series of four questions were asked about the Greater Sudbury Hydro / Greater Sudbury Utilities website.

Q26. "Have you visited the Greater Sudbury Hydro or the Greater Sudbury Utilities website over the past 12 months?"

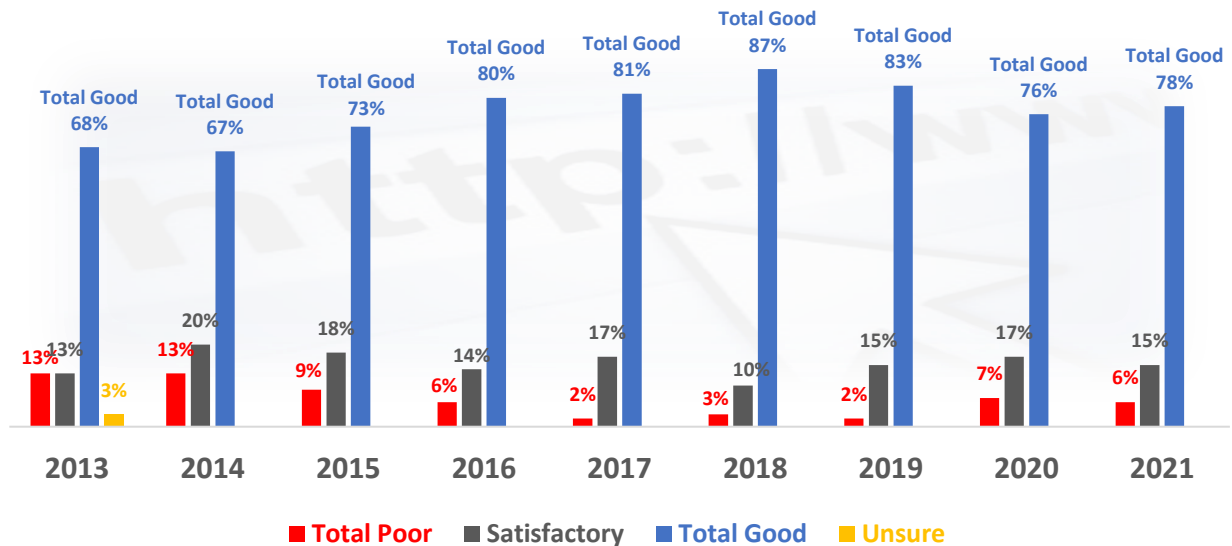
**59% Yes**  
(-7%)

Fifty-nine percent said they have visited the website(s) in the last year, down from 66% in 2020 and higher than the 48% in 2019.



The 59% (N=59) of visitors were then asked three follow up questions about the information the websites contain. In the first, they were asked to rate the quality of the information provided.

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



The total good and very good rating improved +2% compared to 2020 and is now 78%.

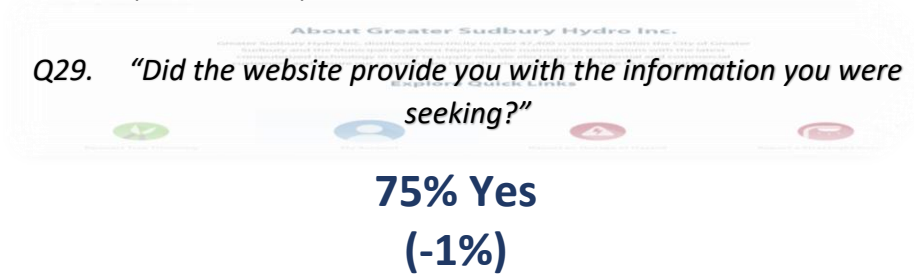
The N=59 website visitors were then asked about the information they were looking for. Multiple responses were accepted and below are the percent of cases or the percent of respondents naming each individual category.

**Q28. "What information did you look for?"**

Account information	42%
Energy conservation	27%
Rates & Fees	25%
News or Developments	14%
Outages	7%
Corporate info	5%
Contact information	3%
Report an issue	2%

Most named was accessing account information (42%), to find out about energy conservation initiatives (27%) and rates or fees (25%).

In the final website question, the N=59 visitors were asked if they found the information on the website they were looking for. Results are consistent with 2020 with 75% answering that they found the information (76% in 2020).

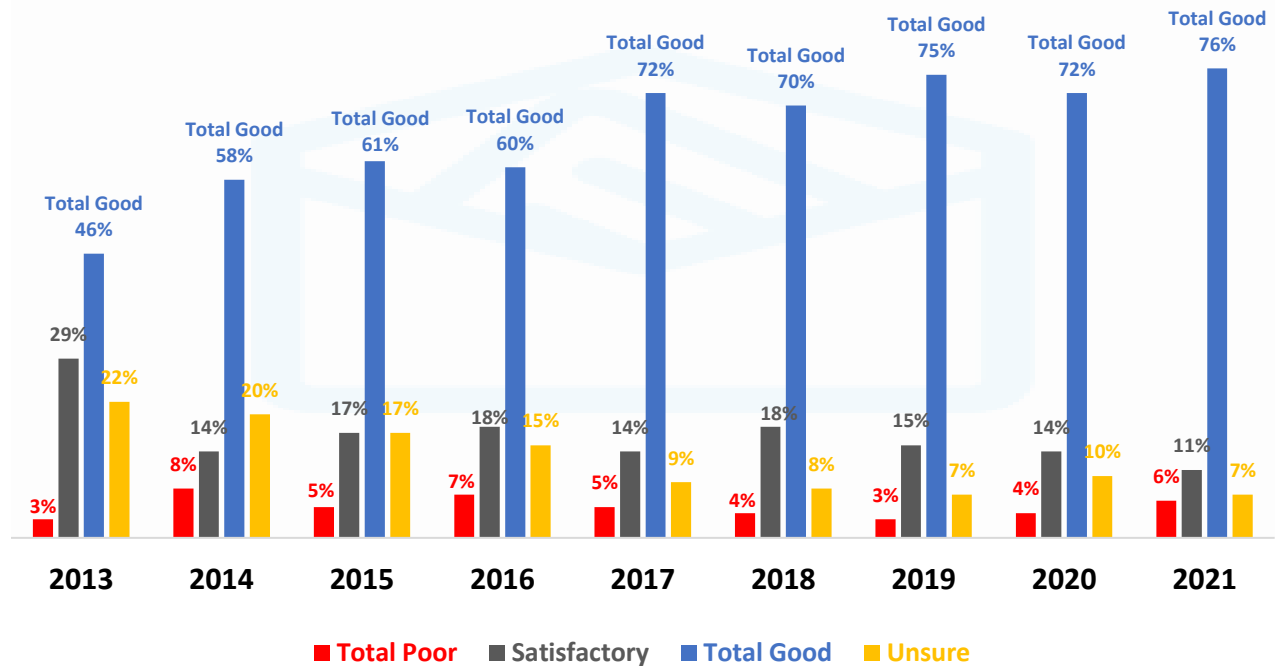




## Rating Bill Inserts & Links

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

Q30. “From time to time, Sudbury Hydro attaches information to your bill in the form of a bill insert, or for electronic bills, in the form of a link. Using a scale from one very poor to five very good, how you would rate the overall quality of the material you have received from Greater Sudbury Hydro? “

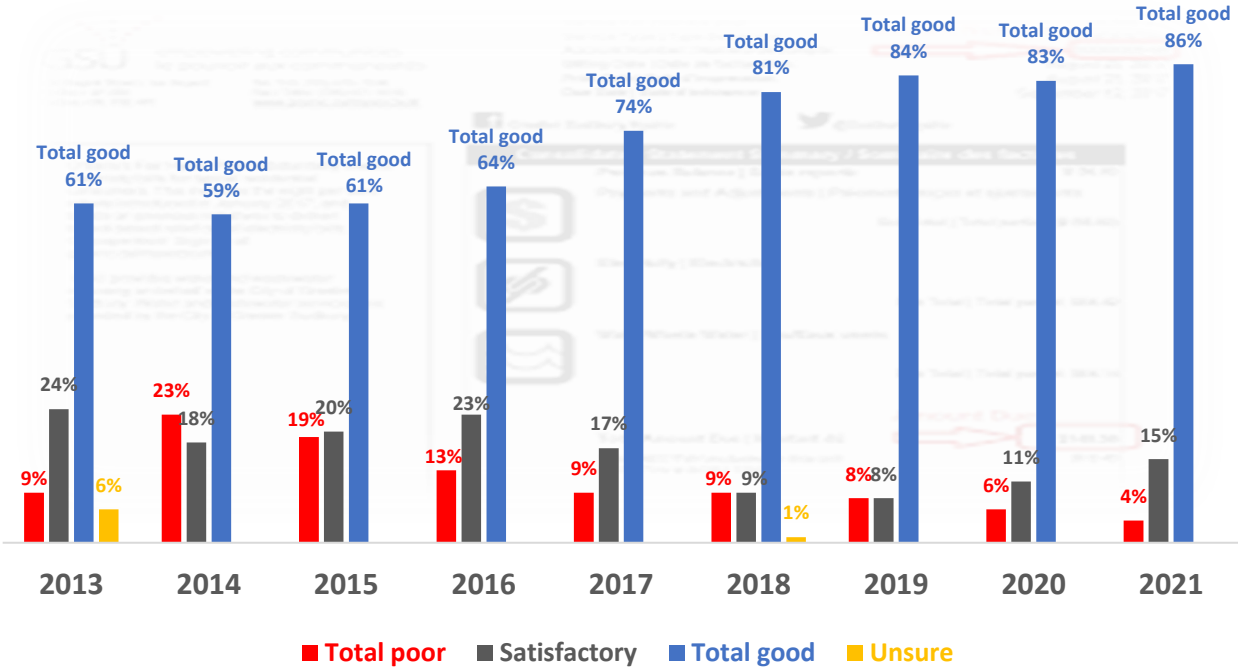


The good and very good rating provided for bill inserts or electronic bill links is 76%, up +4% from 2020.

# Billing – Ease of Understanding

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

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



Results are +3% higher over 2020 with 86% providing a good or very good rating for the ease of understanding their bill.

## Improvement Comments

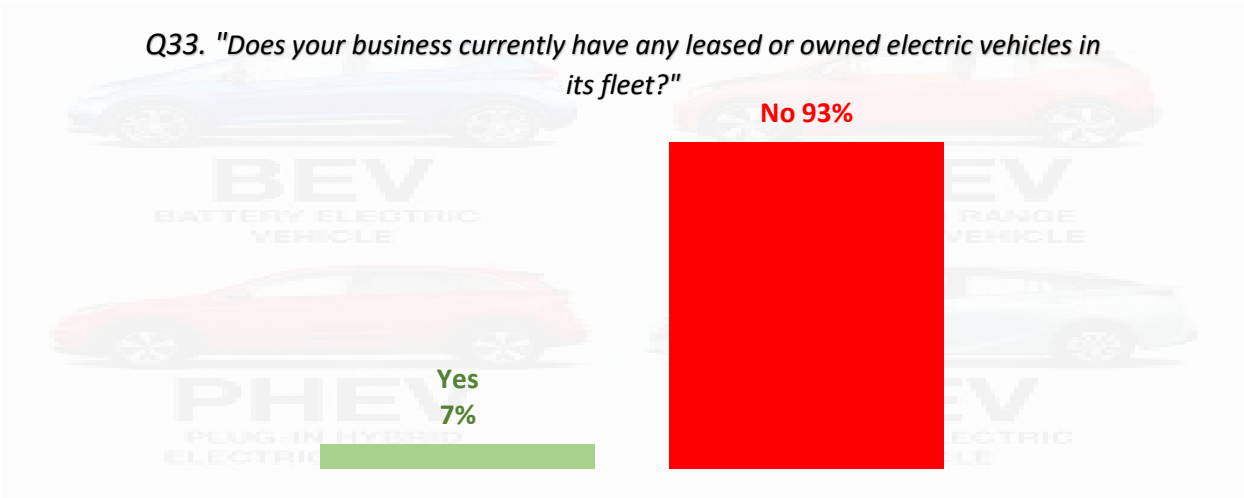
All business customers were asked what they felt Greater Sudbury Hydro could do to better service its customers. With one top of mind answer accepted, cost or price issues dominated.

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

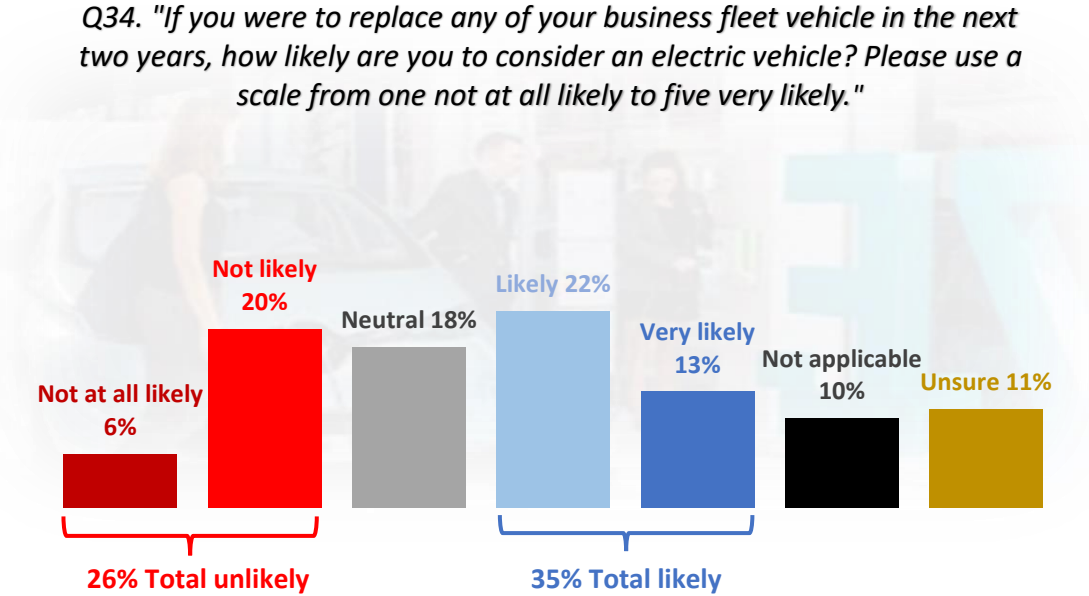
Lower rates	34%
Maintain rates / no increases / freeze	33%
Don't know	15%
Information on what is involved in the price of hydro	6%
No interruptions / outages	5%
Be easier to reach	4%
More information on how to save / conserve energy	1%
Incentives / programs for reducing electricity	1%
Fewer outages / quicker response to outages	1%

# Electric Vehicles

The following two survey questions, asked to all (N=100) business customers, were about electric vehicles. In the first probe, they were questioned if they currently own or lease an electric vehicle of which 7% said yes.



All N=100 respondents were then asked about the likelihood of them considering the purchase of an electric vehicle over the next 24 months?

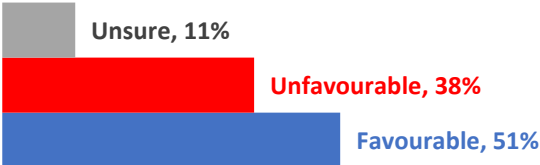


Thirty-five percent said they are likely (22%) or very likely (13%) to consider the purchase of an electric vehicle over the next 24 months.

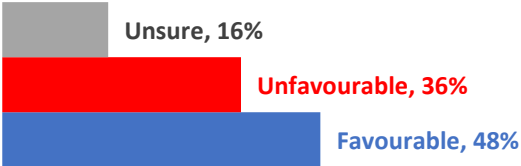
# Energy Self Generation & Storage

The final set of questions probed all N=100 respondents about their opinions of energy self generation and storage. They were first asked if they have a favourable or unfavourable opinions of each.

*Q35. "Do you have a favourable or unfavourable opinion of energy self-generation such as solar panels, to meet, offset, or lower your energy consumption and costs?"*



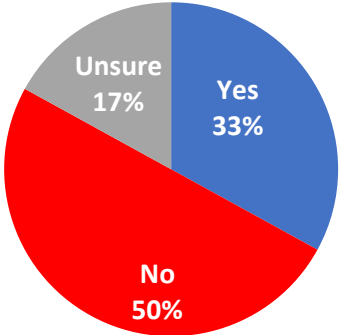
*Q36. "Do you have a favourable or unfavourable opinion of energy storage or the ability to store electricity generated from rooftop solar panels?"*



Slightly more than half or 51% have a favourable opinion of energy self generation that would lower their energy consumption and energy costs. Thirty-eight percent have an unfavourable view and 11% were unsure. A slightly reduced number or 48% said they have a favourable opinion of energy storage, while 36% answered unfavourable and 16% did not know.

When then asked if they would be interested in generating and storing some or all of the electricity needed for their business, one-third said yes, half no, while 17% were unsure.

*Q37. "Would you be interested in generating, and potentially storing, some or all of your electricity needed for your business?"*



In a final open-ended question, all respondents were asked to explain what would motivate them to install an energy generation and storage system for their business. Know more about the cost, payback and how bills would be lowered totalled 45% of responses, while 38% answered nothing or were unsure.

**Q38. *“What would motivate you to install an energy generation and or storage system for your business?”***

Cost	28%
Nothing	27%
Need more information	14%
Unsure	11%
Lower utility bills	9%
What is the payback on investment	8%
Financing	1%
Contractors (reputable)	1%
Reliability	1%