



Greater Sudbury
Hydro
du Grand Sudbury

Customer Satisfaction Survey *2022 Report*



December 2022

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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 2022 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 2022 period. In each of these (N=10) 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 2022 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.

SAMPLE BREAKDOWN	
Residential	N=400
Business	N=100
TOTAL	N=500

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 25th to December 4th, 2021.

Confidence

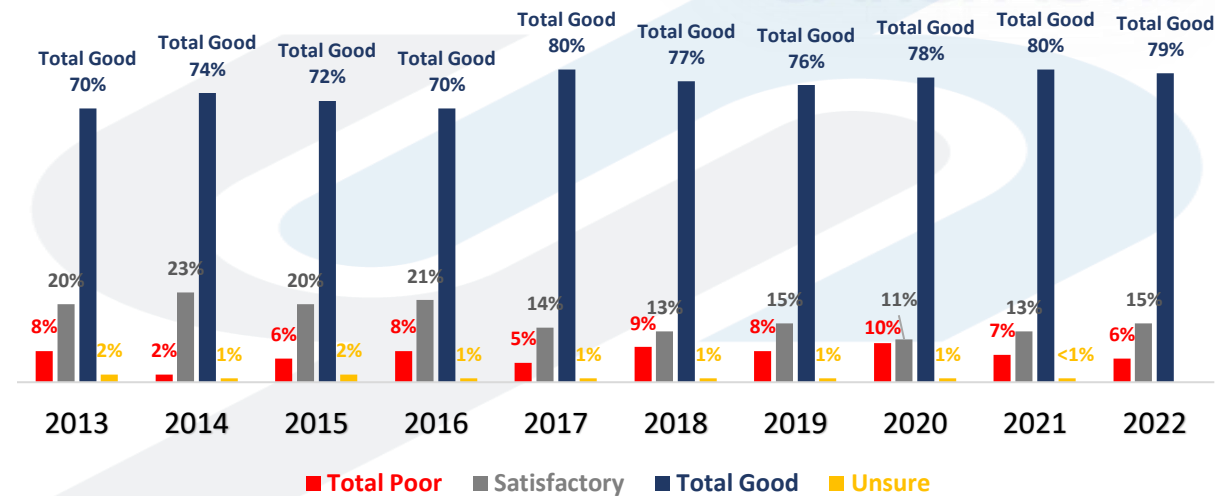
The margin of error for the N=400-person residential survey is $\pm 4.9\%$, $\frac{19}{20}$ times and $\pm 9.8\%$, $\frac{19}{20}$ times for the sample of N=100 businesses.

EXECUTIVE SUMMARY – RESIDENTIAL

Satisfaction

Residential customers were first asked an overall satisfaction question. The following graph compares the December 2022 results with the previous 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
Male	4%	16%	80%
Female	8%	14%	77%

	Total Poor	Satisf.	Total Good
18-34	11%	17%	72%
35-44	5%	17%	77%
45-54	4%	7%	89%
55-64	5%	12%	83%
65+	5%	19%	74%

	Total Poor	Satisf.	Total Good
Under \$50,000	16%	22%	62%
\$50,000 - \$74,999	2%	14%	84%
\$75,000 - \$99,999	4%	8%	88%
\$100,000 or more	4%	13%	83%

Satisfaction scores in terms of good and very good responses have remained consistent over the past three survey touchpoints in the 78% to 80% range.

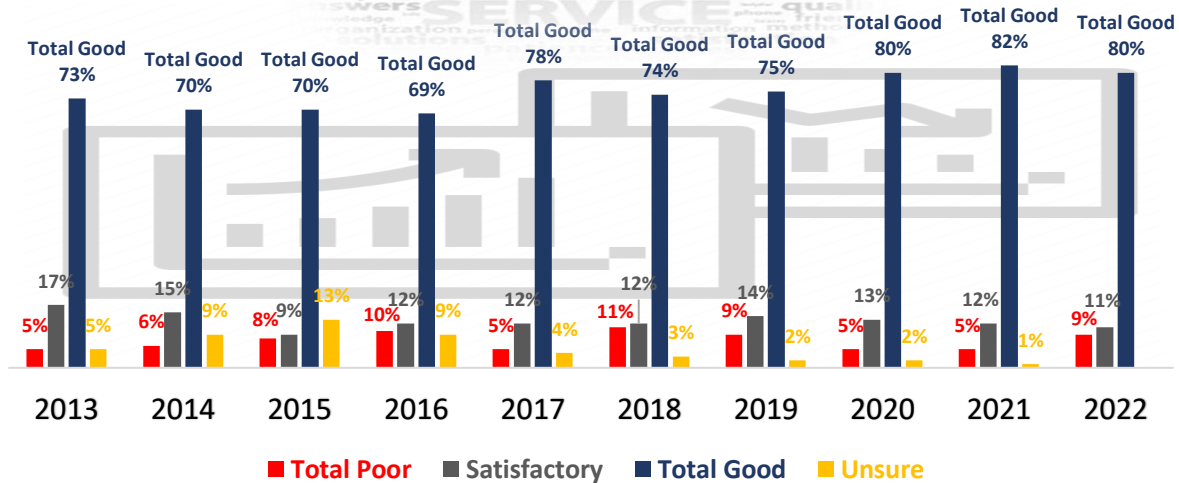
The total good (38%) and very good (41%) rating stands at 79%, down only slightly from 2021. While the total poor rating also fell, there was a slight increase in the satisfactory response.

Good and very good scores were strong across all categories but were lower among those earning the least (under \$50,000) as well as the youngest (18-34) and oldest (65+) customers.

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
Male	7%	11%	82%
Female	11%	11%	78%

	Total Poor	Satisf.	Total Good
18-34	15%	15%	70%
35-44	8%	14%	78%
45-54	6%	9%	85%
55-64	8%	12%	80%
65+	9%	4%	91%

	Total Poor	Satisf.	Total Good
Under \$50,000	19%	15%	66%
\$50,000 - \$74,999	4%	3%	93%
\$75,000 - \$99,999	6%	4%	90%
\$100,000 or more	5%	6%	89%

Eight in ten customers view the customer service of Greater Sudbury Hydro more favourably in relation to other providers. Total good results are down slightly -2% compared to 2021 and are at 2020 levels. There was a +4% increase in those that responded poor or very poor (9%).

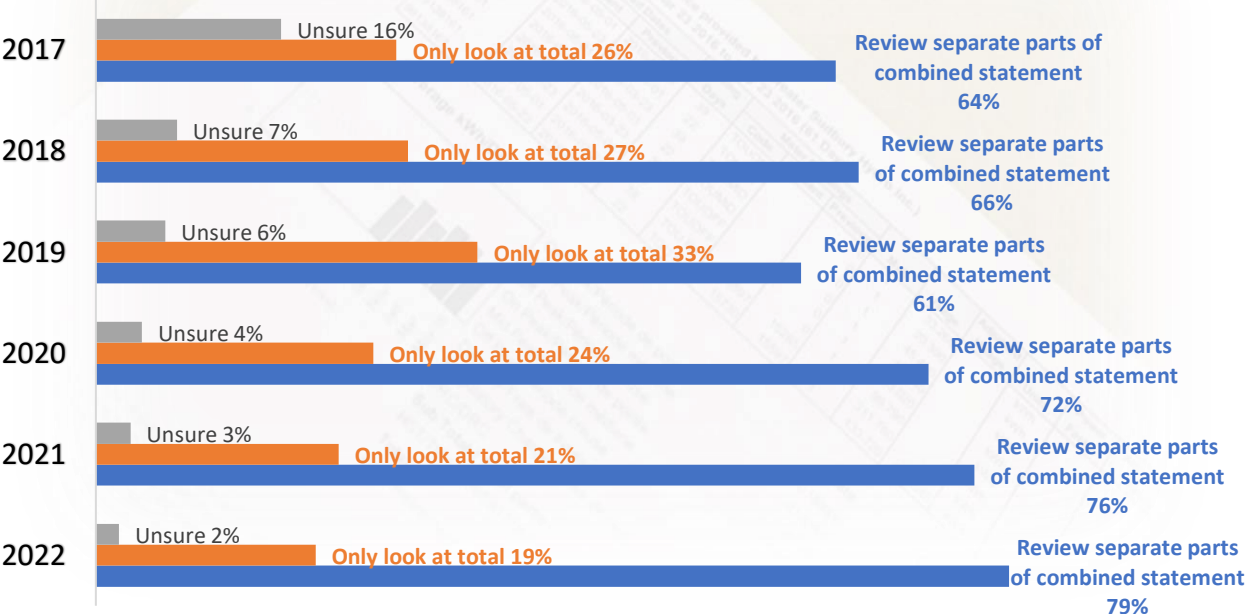
The youngest (18-34) and especially those earning the least (under \$50,000) provided the lowest total good ratings and the highest total poor scores.

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 2022 survey period resulted in more customers reviewing the separate parts of their bill. Almost eight in ten or 79% said they reviewed separate parts of the bill, a +3% increase compared to 2021. Results below reveal that interest in reviewing their bill in detail is driven by age.

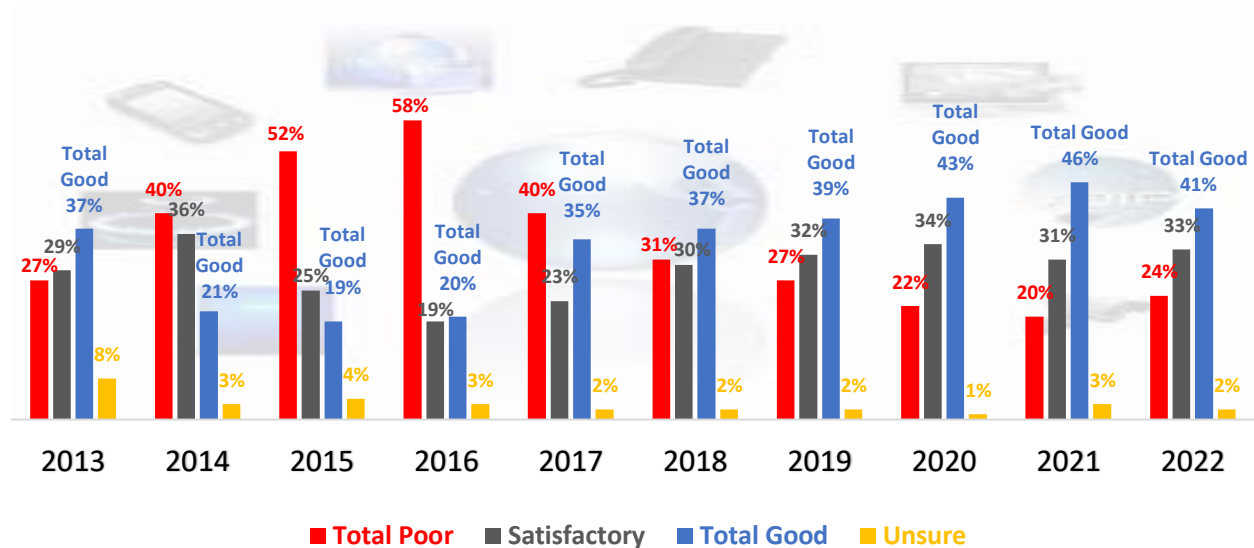
	1-review separate parts of combined statement	2-only look at total	Don't know
18-34	59%	36%	5%
35-44	71%	26%	3%
45-54	88%	10%	1%
55-64	92%	8%	-
65 and over	91%	9%	-

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.

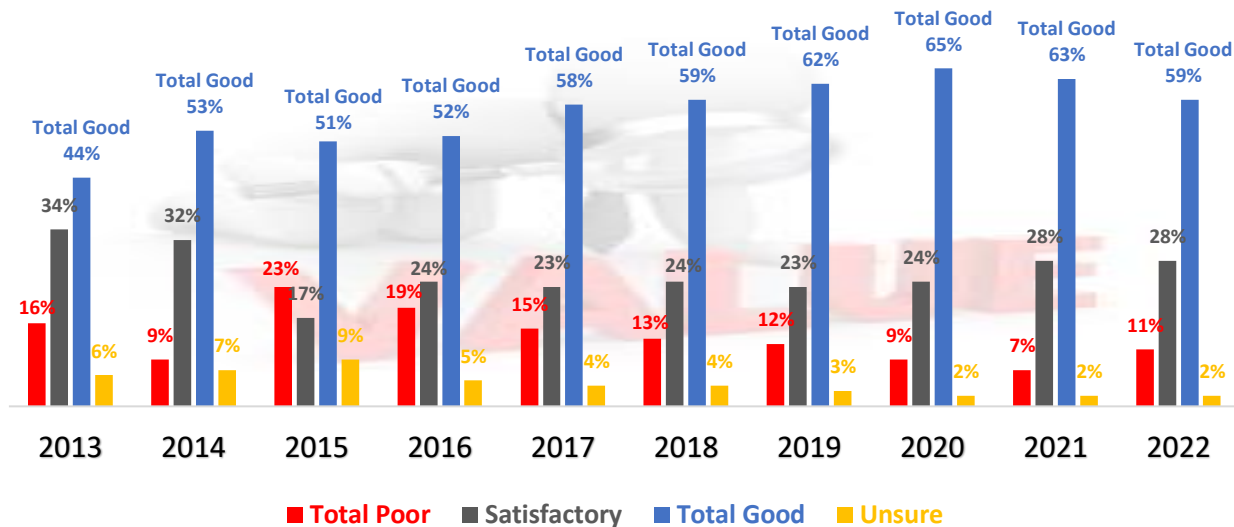
Q4. “How would you rate your satisfaction with the price you pay for electricity compared to what you pay for other (essential) services in your area (heating fuel, phone provider or your cable TV and satellite companies)?”



There was a decrease of -5% in the percentage of customers that rated the comparative price they pay for electricity as good or very good compared to the previous 2021 survey period. Total good results are now in line with 2019 findings.

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?"



The overall value indicator also dropped in relation to 2021 as consumer concerns over rising costs are also impacting views on electricity pricing. Fifty-nine percent rated the value GSH provides as good or very good, down -4% from the 63% in 2021.

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	2022
Q6. Greater Sudbury Hydro provides customers with reliable and good service.	77%	75%	73%	72%	79%	82%	82%	84%	85%	87%
Q7. Greater Sudbury Hydro is committed to effectively managing a balanced budget.	25%	33%	32%	29%	30%	40%	37%	32%	30%	31%
Q8. Greater Sudbury Hydro meets its commitment to customers.	80%	76%	75%	73%	78%	79%	81%	83%	84%	86%
Q9. GSH provides its customers with information about programs to help reduce their energy costs.	58%	71%	61%	59%	65%	72%	68%	63%	60%	56%
Q10. Greater Sudbury Hydro is concerned about public safety and safe work practices.	48%	63%	54%	60%	62%	63%	62%	60%	68%	69%
Q11. Greater Sudbury Hydro encourages efficient use of electricity among its customers.	62%	72%	74%	71%	75%	80%	74%	67%	62%	58%

GSH rated strong and highest in terms of total agreement for providing customers with good service at 87% a slight increase of +2% over 2021. This was very closely followed by meeting its commitment to customers at 86%, a +2% improvement over the previous poll. Being concerned about public safety and safe work practices came in with the third highest agreement at 69%, +1% higher compared to 2021.

Lower agreement and decreases from the 2021 survey were provided for the two indicators related to energy efficiency and energy costs. This included encouraging the efficient use of electricity at 58% and providing information about programs to reduce costs at 56% both of which decreased by -4%.

The question on being committed to effectively managing a balanced budget continues to have the lowest percentage of agree or strongly agree responses at 31% (+1%), while a significant 43% (45% in 2021) 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 AREAS – TOTAL GOOD RESPONSES	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Q12. The reliability of power supply	83%	92%	90%	88%	89%	82%	85%	88%	86%	87%
Q13. Prompt responses to power outages when they occur	72%	82%	81%	84%	86%	80%	78%	80%	82%	79%
Q14. Effectively scheduling planned power outages	57%	54%	66%	64%	70%	68%	65%	63%	67%	63%
Q15. Effectively communicating with customers about planned power interruptions in your area	55%	56%	68%	66%	63%	61%	60%	54%	60%	57%

The reliability of the power supply indicator remains the highest rated in terms of combined good and very good responses at a strong 87%, up slightly (+1%) from 2021. Next best scored was the area of promptly responding to outages at 79%, despite a dip of -3% over the previous poll.

Effectively scheduling planned power outages rated lower at 63% dropping -4% (22% were unsure), while the lowest scored at 57% was for effectively communicating with customers about planned power interruptions, dropping -3% (24% 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	2021	2022
1-lowest rates – regular outages	2%	4%	4%	3%	2%	1%	2%	4%	5%	6%
2-low rates – occasional outages	15%	3%	8%	7%	5%	6%	10%	11%	12%	15%
3-neutral – a balance between rates and outages	44%	55%	47%	54%	59%	61%	58%	62%	65%	67%
4-high rates – only a few outages	15%	13%	11%	12%	11%	13%	12%	8%	7%	5%
5-highest rates – no outages	3%	5%	6%	5%	8%	7%	4%	6%	5%	3%
Don't know	22%	21%	24%	19%	15%	12%	14%	9%	6%	4%

There is a continued increase in the percentage of customers that want a balance between rates and outages at 67%, +2% higher compared to 2021.

Twenty-one percent of customers are now willing to tolerate some form of outages compared to a lower 17% in 2021. This includes 15% that answered low rates with occasional outages and 6% the lowest rates and regular outages.

Only 5% prefer high rates with only a few outages and 3% the highest rates and no outages (8% combined), lower than the 12% that wanted few or no outages in 2021. The number of undecided's also fell -2% to 4%.

Payment Options & Online Management

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

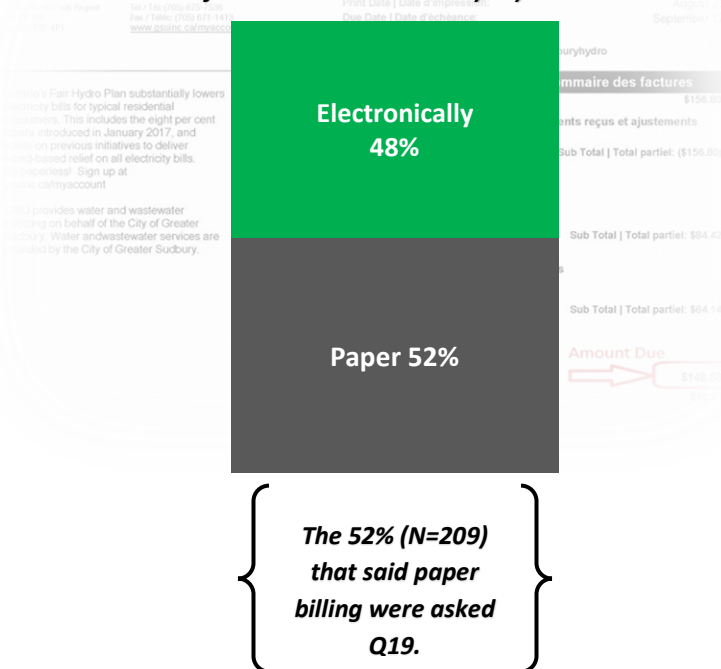
Q17. "What is your preferred method of paying your bill?"

	2019	2020	2021	2022
Online/telephone banking	64%	67%	64%	66%
Automatic withdrawal bank acct (variable payment)	22%	21%	19%	17%
Equal monthly payment plan (automatic withdrawal)	9%	10%	13%	13%
Credit card	NA	NA	2%	1%
Online at Sudbury Hydro Website	3%	1%	2%	2%
Payment at Greater Sudbury Hydro	3%	1%	-	<1%
Payment in person at Citizen Service Centre	NA	NA	NA	<1%

Online banking remains the preferred method of paying bills by 66%, followed by 17% that named automatic withdrawal and 13% equal monthly payments.

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-eight percent of respondents to the survey said they now get their bill electronically, up 4% from 2021.

E-bills are most used by 18-34 (72%), 35-44 (65%) and 45-54 (44%) year old's, and least by those 55-64 (29%) and 65+ (17%). The highest earners (\$100,000+) were also most likely to receive their bill electronically (65%), followed by those in the \$75,000-\$99,999 cohort (54%).

Respondents that said they receive a paper bill in Q18 (52%, N=209) 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?”

I plan to, just haven't done it yet	13%
Nothing no interest	13%
Offer the option / let customers know of option	12%
Everything is going online / no choice	11%
If it would have more information in it (details)	10%
If it would be easier / more convenient	9%
Don't know	8%
It would use less paper	8%
If i could receive bill quicker / on time	3%
If easy to set up / access	3%
Saves money	3%
Nothing I prefer a hard copy	2%
As long as it is secure	2%
If a discount / lower price was offered	1%

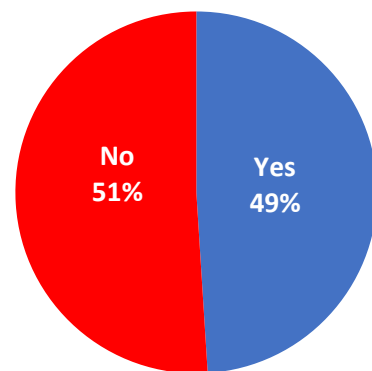
There is a willingness to move to electronic billing as the top mentions related to just not getting around to it yet (13%), wanting to know that the option exists (12%) as well as needing more information (10%) and that everything is going online (11%). Only 15% said they have no interest (13%) or that nothing would convince them as they prefer paper (2%).

All N=400 customers were then asked if they manage their Greater Sudbury Hydro account online.

Q20. “Do You currently manage your GSH account Online?”

Almost half or 49% of customers said that they manage their Greater Sudbury Hydro account online. This compares to 46% in 2021, 41% in 2020 and 38% in 2019.

Those that manage their account online were then asked a series of follow-up questions related to their usage.



The 49% (N=195) that manage their account online were asked Q21 to Q23 as follow-ups.

The 49% (N=195) that manage their account online were first asked in an unaided probe about the information they use on the online portal.

Q21. "What information do you use on the online portal?"

View bill / amount owing / pay bill	59%
Transaction history / payments	14%
Usage / consumption	12%
Account profile / details	6%
Smart meter	5%
Unsure / do not recall	3%
Rates	1%

They (49%, N=195) were next asked in another unaided question about what information they would like to see added to the online portal.

Q22. "What information would you like to see added to the online portal?"

Unsure	51%
No others	27%
Change payment options	6%
Payment deferral / arrangements	5%
Ways to save	3%
Moving (in/out)	3%
Disconnection / reconnection info	3%
Outages	2%

The final unaided question asked to the 49% (N=195) that manage their account online was about the self serve options they would like to see added to the portal.

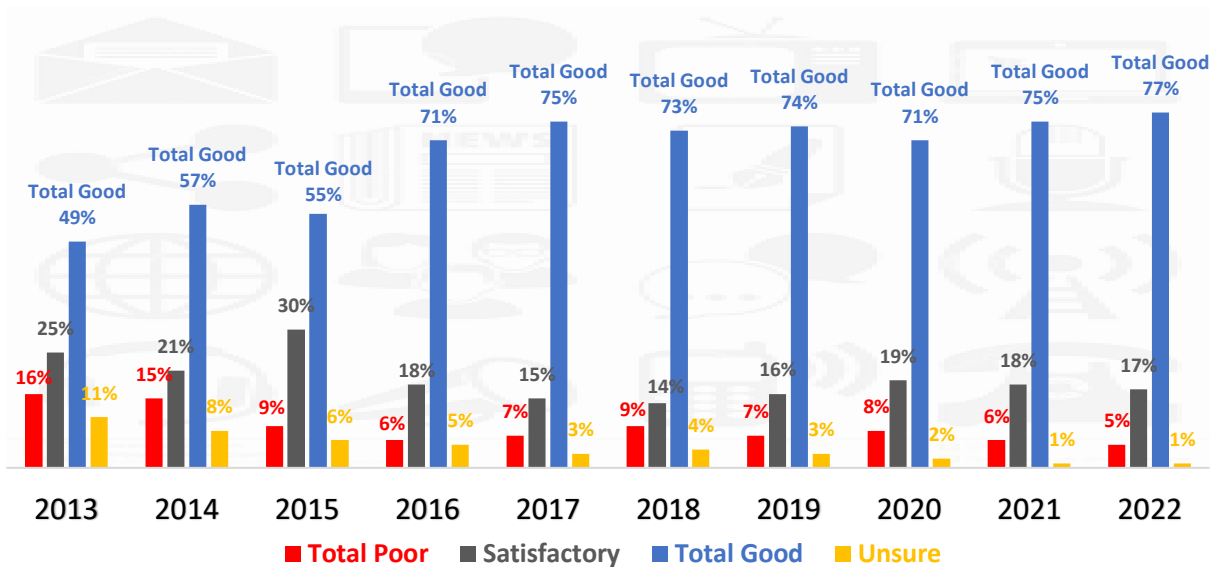
Q23. "What self-serve options would you like to see added to the online portal?"

Unsure	46%
No other	34%
Pre-authorized payments / other options	8%
Move-in/move-out	4%
Payment deferral / arrangements	4%
Change payment options	3%
Disconnection / reconnection	2%

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."



Total Good Response

Male	77%
Female	77%

There was a +2% increase in the positive (good & very good) rating for communicating with customers in relation to 2021. In total, 77% providing a good or very good rating, the highest result to date.

Total Good Response

18-34	71%
35-44	76%
45-54	79%
55-64	77%
65+	84%

While results were solid across all demographic categories, the best good or very good rating was provided by those 65+ and among those with incomes of between \$50,000 to \$74,999.

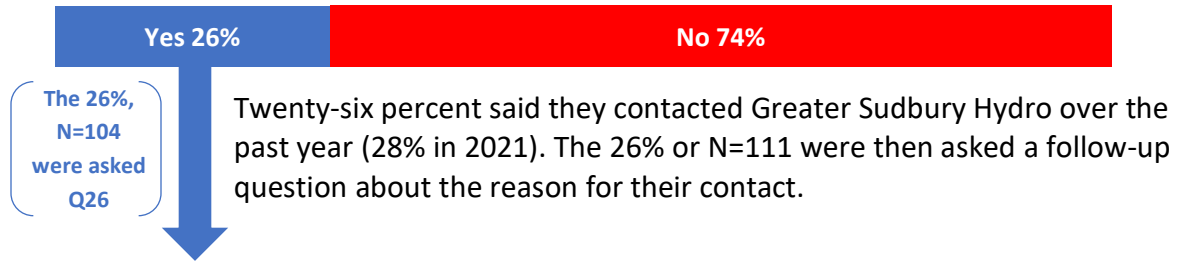
Total Good Response

Under \$50,000	76%
\$50,000 - \$74,999	87%
\$75,000 - \$99,999	81%
\$100,000 or more	78%

Contact

Customers were next probed about 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.

Q25. "Over the past 12 months, have you contacted Greater Sudbury Hydro / Greater Sudbury Utilities?"



Q26. "What was the nature of your inquiry?"

Outages / information	36%
Billing issues / inquiry	32%
Open or close account / change account info	13%
Streetlights	6%
Energy savings program	6%
Change payment options / deferral	4%
General inquiry	2%
Tree cutting	1%
Line locates	1%

The main reasons for contacting Greater Sudbury Hydro related primarily to issues related to outages, billing issues / inquiries and general account information or changes.

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

Q27. "How would you like to communicate with Greater Sudbury Hydro?"

Email	46%
Social media	22%
Telephone	20%
Texts	6%
Website form	5%
Don't know/no preference	1%
Regular mail	1%

Email is the preferred method at 46% (-1% compared to 2021), followed by social media at 22% (+4%), telephone (-8%), texts (+4%) and a website form (+2%).

Customers were then asked to identify the communication option they would like to see Greater Sudbury Hydro offer.

Q28. *“What communication option would you like to see Greater Sudbury Hydro offer in the future?”*

Email	47%
Automated Chat/Virtual Assistant	17%
Text/SMS notifications	12%
Live Chat	9%
Automated voice message	9%
Unsure	5%
None	2%

Email was most named (+4% over 2021), followed by automated chat/virtual assistant (-1%), text/SMS notification (+1%), live chat (+2%) and automated voice messages (+1%).

Greater Sudbury Hydro Website

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

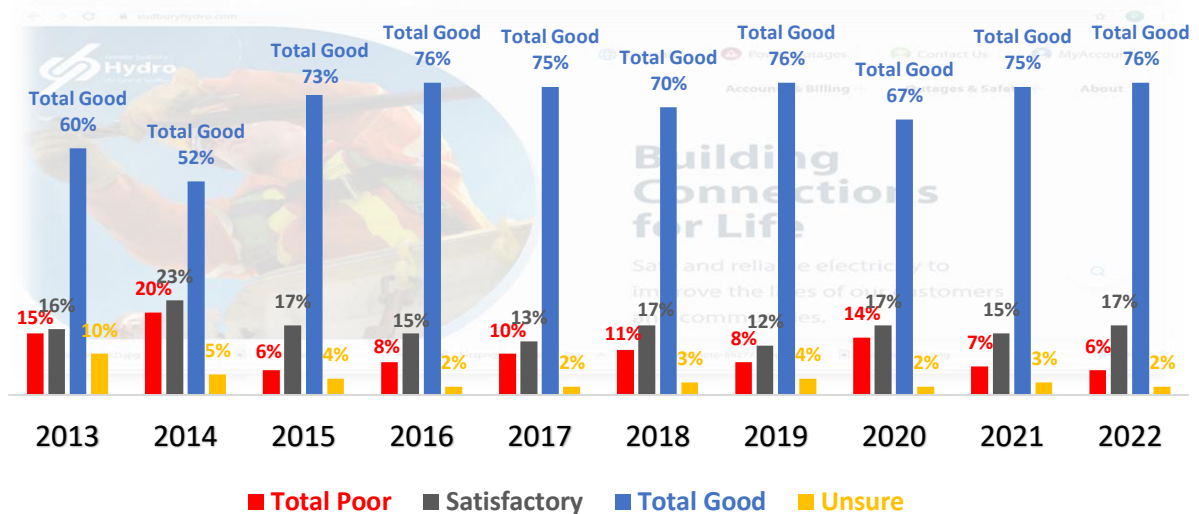
Q29. "Have you visited the Greater Sudbury Hydro or the Greater Sudbury Utilities website over the past 12 months?"



Fifty-five percent said they have visited the website(s) in the last year, up from 53% in 2021, 48% in 2020 and 38% in 2019.

The 55% (N=221) 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.

Q30. "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 consistent at 76%, up slightly +1% from 2021.

The N=221 (55%) 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.

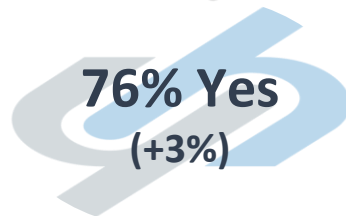
Q31. "What information did you look for?"

Account information / billing / payments	45%
Energy conservation / programs / save money	25%
News or Developments	21%
Rates & Fees	16%
Outages / safety	14%
Contact information	7%
Environment/Safety	4%
Corporate info	3%

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=221 visitors were asked if they found the information on the website they were looking for.

Q32. "Did the website provide you with the information you were seeking?"

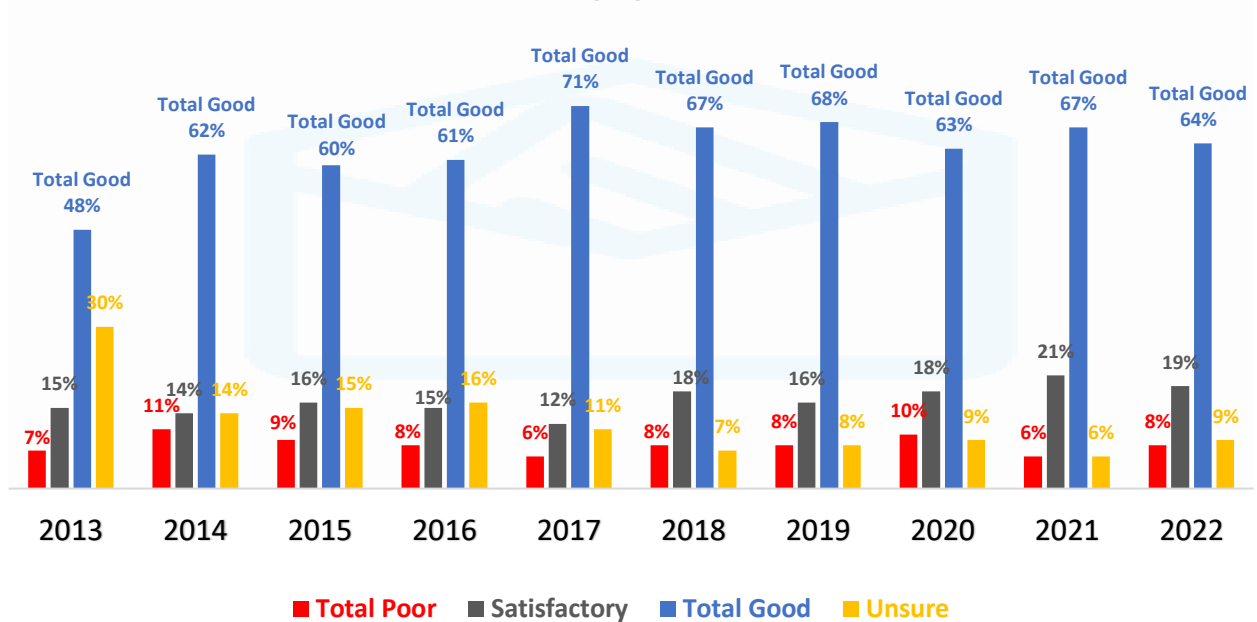


Seventy-six percent said yes or that they found the information, compared to 73% in 2021, 71% in 2020 and 82% in 2019.

Rating Bill Inserts & Links

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

Q33. “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? “

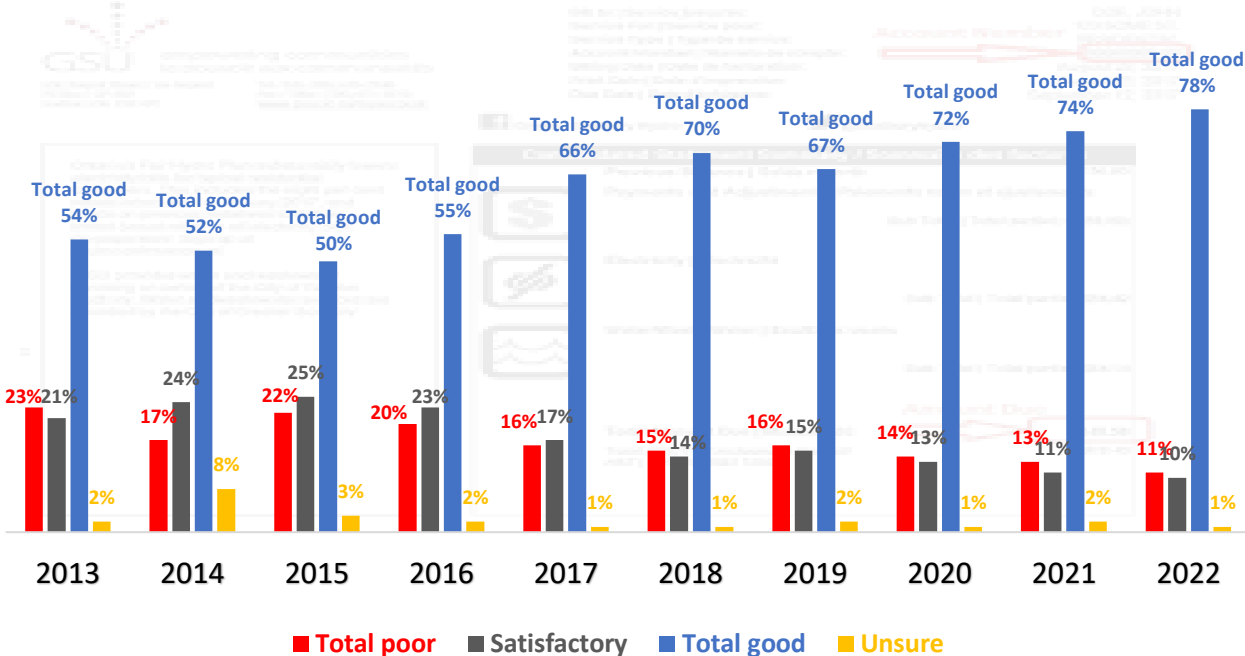


Three percent fewer or 64% (67% in 2021) provided a good or very good rating for the overall quality of bill inserts or electronic link information provided.

Billing – Ease of Understanding

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

Q34. “Using a scale from one very poor to five very good, how would you rate how easy it is to read and understand your power or utility bill?”



Almost eight in ten or 78% provided a good or very good rating for the ease of understanding their bills, +4% higher than they did in 2021.

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.

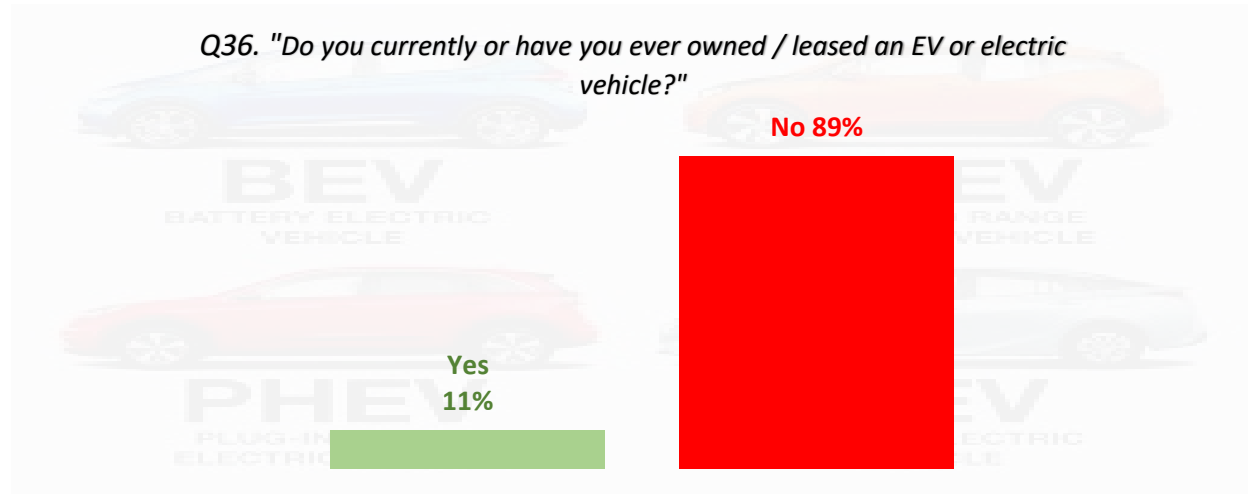
Q35. “What can Greater Sudbury Hydro do to better service its customers?”

Lower rates	34%
Don't know	21%
Fewer outages / quicker response to outages	10%
Maintain rates / no increases / freeze	10%
Incentives / programs for reducing electricity	8%
More information on how to save / conserve energy	6%
More information on alternative energy options	3%
Explain cost of energy on bills	3%
Be easier to contact	2%
Information on what is involved in the price of hydro	1%
Make bills easier to understand / clearer	1%
Better communication	1%
Invest in alternative energy sources	1%
Lower delivery fees	1%
Improved peak times	<1%

Most responses related to cost issues including lower rates or maintaining them and providing customers with solutions on conservation and incentives on how to save energy/money.

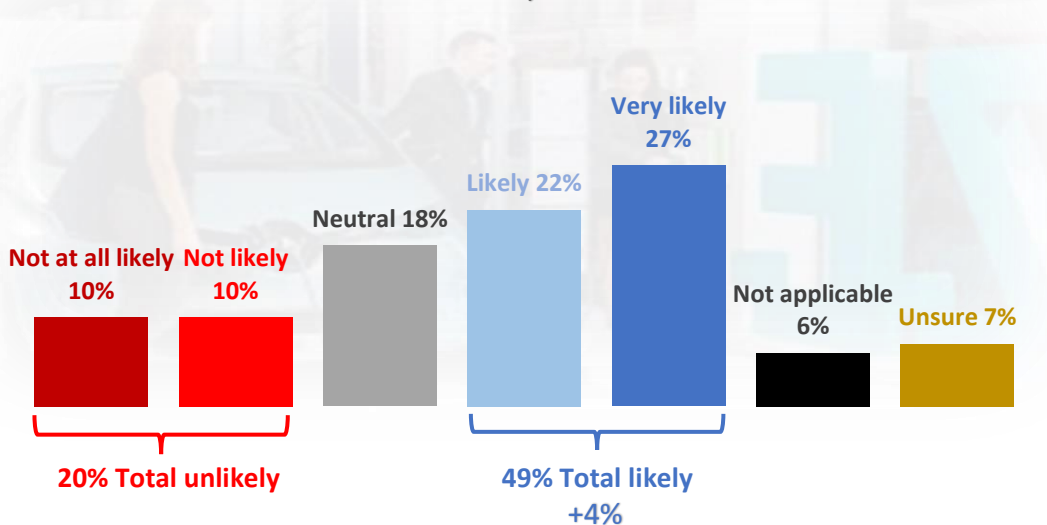
Electric Vehicles

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 11% said yes (10% in 2021).



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

Q37. "If you were to purchase a vehicle in the next 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."

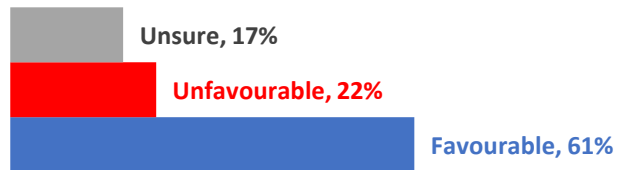


Forty-nine percent said they are likely (22%) or very likely (27%) to consider the purchase of an electric vehicle over the next 24 months, a 4% increase compared to 2021 and +11% in relation to 2020.

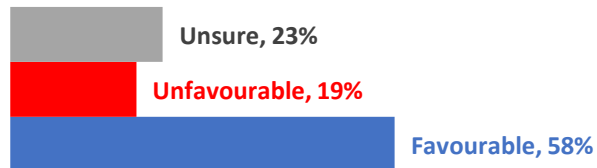
Energy Self Generation & Storage

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 and then about their interest in generating and storing electricity.

Q38. "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?"



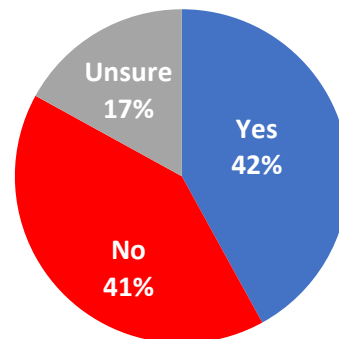
Q39. "Do you have a favourable or unfavourable opinion of energy storage or the ability to store electricity generated from rooftop solar panels?"



A 61% majority have a favourable opinion of energy self generation that would lower their energy consumption and energy costs, an increase of +4% from 2021. While slightly fewer or 58% said they have a favourable opinion of energy storage, this represents an increase of +6% over the previous poll.

When 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 42% saying yes (37% in 2021) and 41% no (43% in 2021). Seventeen percent were unsure or undecided (19% in 2021).

Q40. "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, lowering bills and the expected payback period were most named.

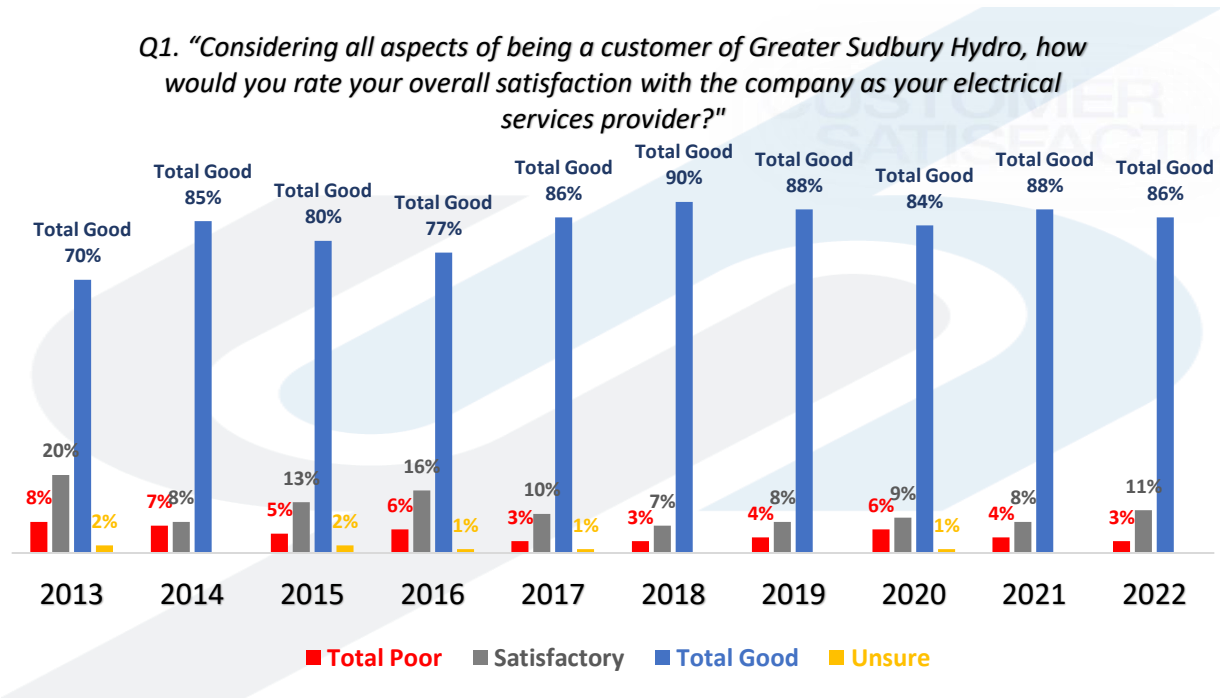
Q41. "What would motivate you to install an energy generation and or storage system for your residence?"

Cost	27%
Nothing	25%
Unsure	18%
Lower utility bills	14%
What is the payback on investment	10%
Help reduce GHG emissions	3%
Reliability	2%
Need more information	1%
Financing	1%

EXECUTIVE SUMMARY – BUSINESS

Satisfaction

Businesses were first asked an overall satisfaction question. The following graph compares the current 2022 results with the previous surveys. Results below combine the total poor (very poor & poor) and total good (good & very good) findings.

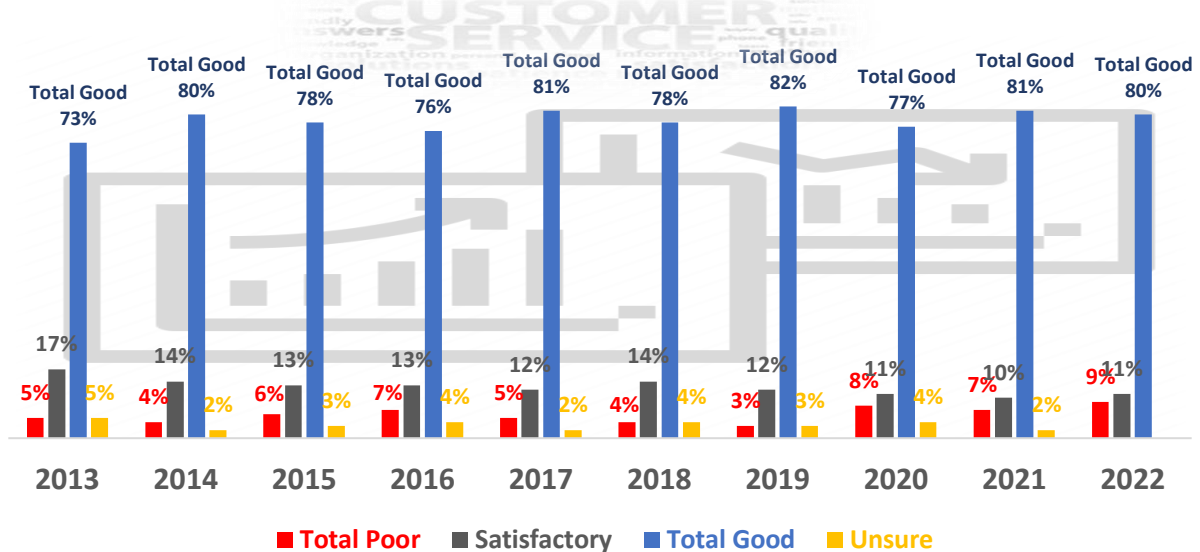


The overall satisfaction score as evidenced by the combined good and very good rating remains consistent at 86%, despite a slight drop of -2% over the previous 2021 poll.

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?"



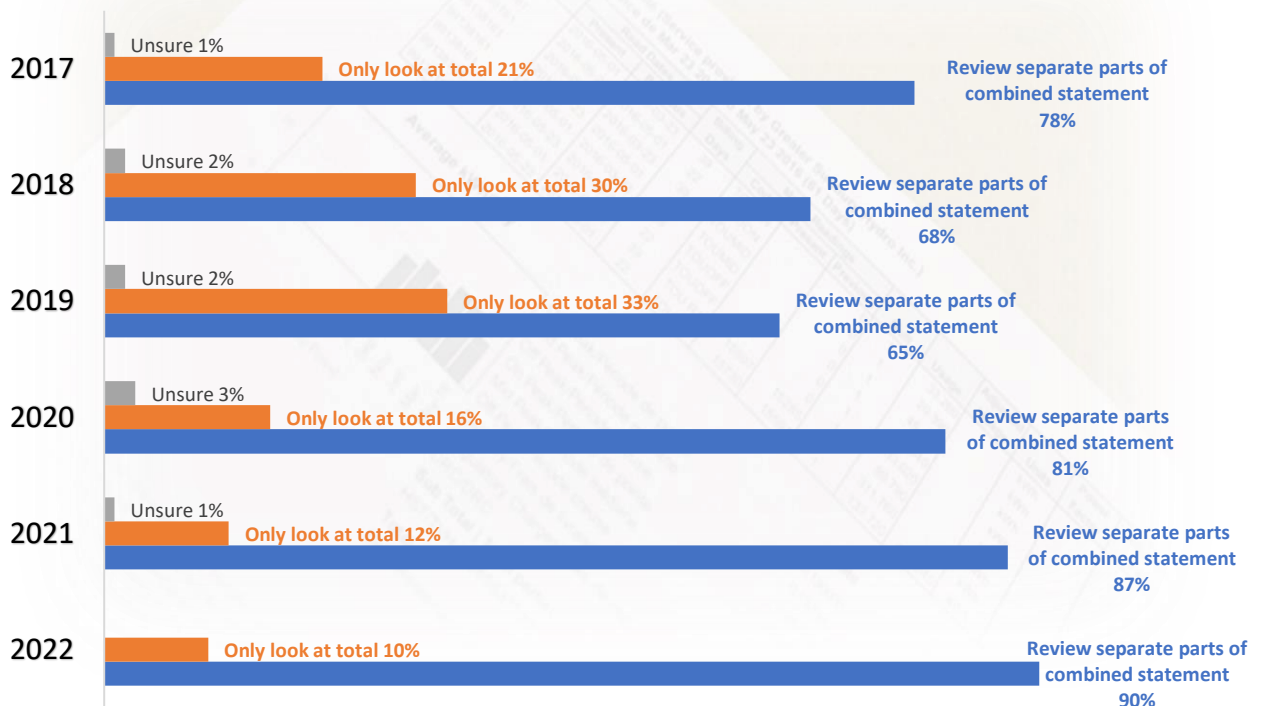
Results are also stable with respect to the comparative customer service score, as the positive rating (good & very good) is 80%, in relation to 81% in 2021.

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?"



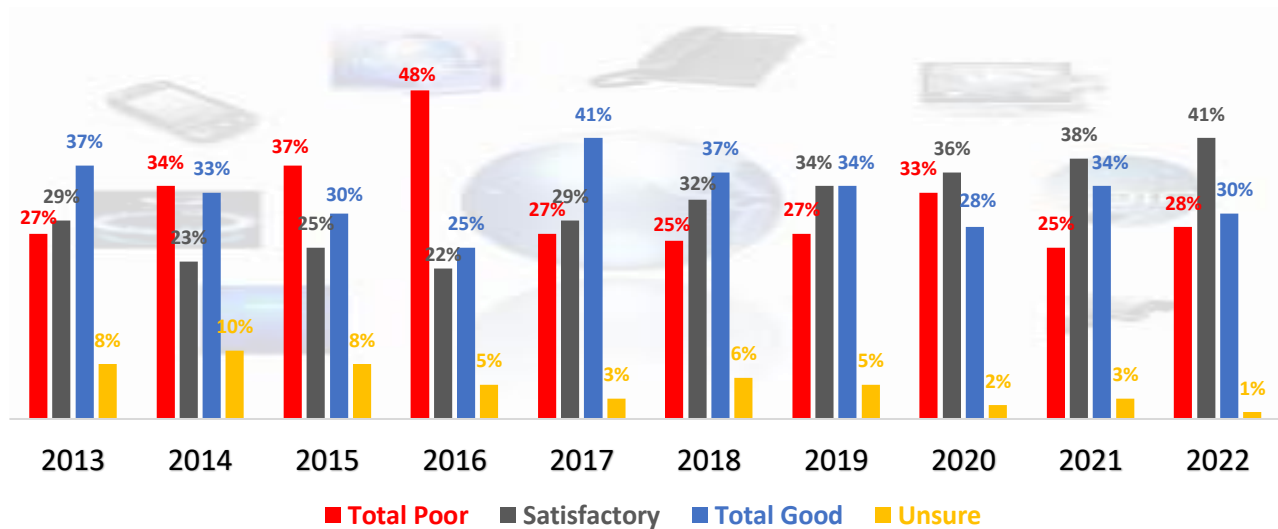
There was an increase of +3% to 90% in the number of businesses that are paying more attention to their bill or reviewing separate parts of the combined statement.

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.

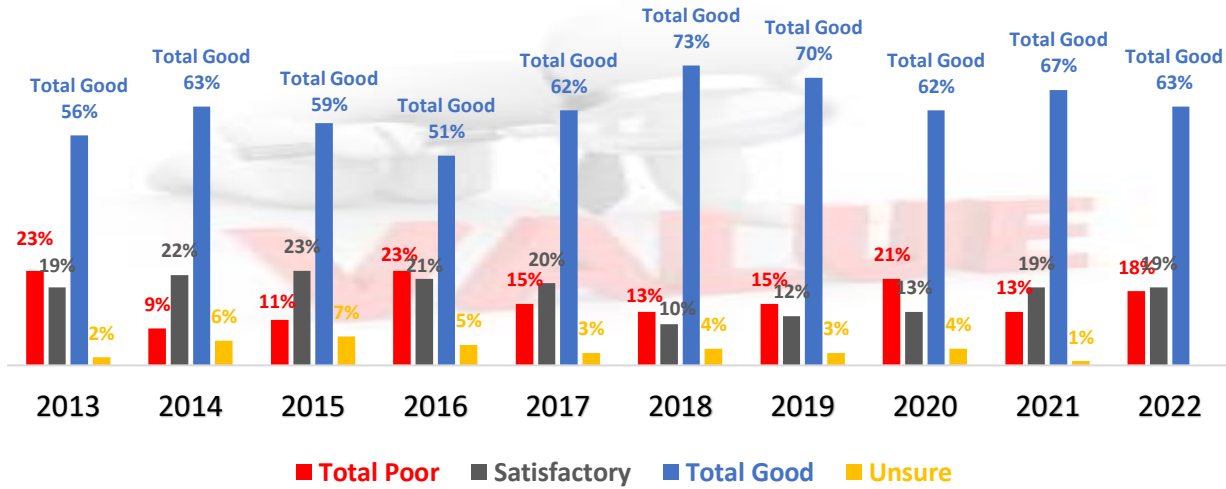
Q4. “How would you rate your satisfaction with the price you pay for electricity compared to what you pay for other (essential) business services?”



Satisfaction (good & very good ratings) with the comparative cost of electricity in relation to other essential services dropped by -4% in relation to 2021. The negative score increased by +3%, while the number of businesses that provided a satisfactory rating also went up (+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?"



There was also a drop with respect to the overall value that GSH provides, as 63% gave a good or very good score, -4% fewer 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	2022
Q6. Greater Sudbury Hydro provides customers with reliable and good service.	69%	89%	85%	81%	84%	91%	90%	93%	94%	92%
Q7. Greater Sudbury Hydro is committed to effectively managing a balanced budget.	25%	21%	21%	19%	17%	27%	23%	20%	23%	20%
Q8. Greater Sudbury Hydro meets its commitment to customers.	69%	86%	83%	79%	85%	86%	80%	85%	87%	89%
Q9. GSH provides its customers with information about programs to help reduce their energy costs.	65%	71%	69%	76%	73%	70%	65%	54%	59%	53%
Q10. Greater Sudbury Hydro is concerned about public safety and safe work practices.	65%	58%	56%	64%	74%	72%	70%	56%	71%	73%
Q11. Greater Sudbury Hydro encourages efficient use of electricity among its customers.	55%	75%	71%	80%	82%	75%	73%	65%	69%	64%

The highest rated category in terms of agreement continues to be for Greater Sudbury Hydro providing good and reliable service at 92%, consistent with 2021 only down slightly (-2%). This was next followed by meeting its commitment to customers at 89%, which increased by +2%.

Total agreement was next best for being concerned about public safety and safe work practices at 73%, (+2%), and encouraging the efficient use of electricity at 64% (-5%). Agreement ratings were lower for providing customers with information / programs to reduce energy costs at 53% (-6%) and being committed to managing a balanced budget at 20% (-3%) with 34% being unsure or answering 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 AREAS – TOTAL GOOD RESPONSES	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Q12. The reliability of power supply	91%	90%	87%	89%	86%	92%	91%	93%	90%	92%
Q13. Prompt responses to power outages when they occur	74%	73%	70%	72%	80%	82%	81%	86%	85%	87%
Q14. Effectively scheduling planned power outages	61%	59%	55%	41%	58%	53%	55%	51%	54%	52%
Q15. Effectively communicating with customers about planned power interruptions in your area	62%	53%	50%	40%	49%	45%	46%	47%	51%	49%

Highest scored once again was the reliability of power at 92% (+2%), followed by prompt response time to outages at 87% (+2%). They remain lower for effectively scheduling planned outages at 52% (-2%) and for effectively communicating with customers about planned outages at 49% (-2%).

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	2022
1-lowest rates – regular outages	3%	4%	3%	3%	1%	1%	1%	2%	3%	4%
2-low rates – occasional outages	6%	3%	5%	4%	2%	1%	1%	17%	11%	16%
3-neutral – a balance between rates and outages	57%	58%	65%	69%	79%	75%	82%	76%	83%	78%
4-high rates – only a few outages	12%	18%	14%	9%	7%	9%	8%	2%	1%	1%
5-highest rates – no outages	9%	3%	2%	1%	2%	3%	2%	1%	1%	1%
Don’t know	13%	14%	11%	14%	9%	11%	6%	2%	1%	-

Most or 78% still want a balance between rates and outages, although -5% fewer compared to 2021. There was a +6% increase to 20% in the number that want either low rates with occasional outages (16%) or the lowest rates with regular outages (4%). There was no change in the percentage of customers willing to accept high rates for a few outages, or the highest rates and no outages.

Payment Options & Online Management

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

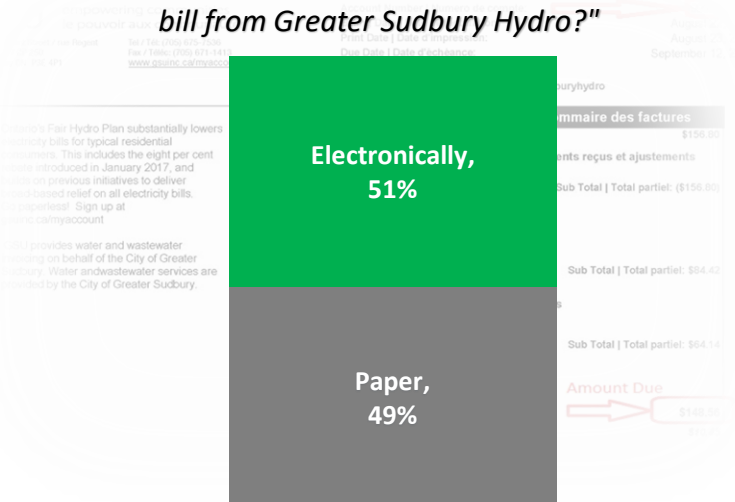
Q17. "What is your preferred method of paying your bill?"

	2019	2020	2021	2022
Online/telephone banking through financial institution	66%	59%	65%	69%
Equal monthly payment plan (automatic withdrawal)	21%	19%	17%	15%
Automatic withdrawal from bank account	16%	15%	14%	11%
Online at Sudbury Hydro Website	4%	6%	3%	5%
Credit card	NA	NA	1%	-
Payment at the Greater Sudbury Hydro office	5%	1%	-	-
Payment in person at Citizen Service Centre	NA	NA	NA	-
Unsure	2%	-	-	-

Online banking remains the preferred method of paying bills by 69%, an increase of 4% over 2022.

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?"



Fifty-one percent of businesses surveyed said they get a bill electronically, +5% higher than in 2021.

The 49% (N=49) that said paper billing were asked Q19.

Respondents that said they receive a paper bill (49%, N=49) 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?"

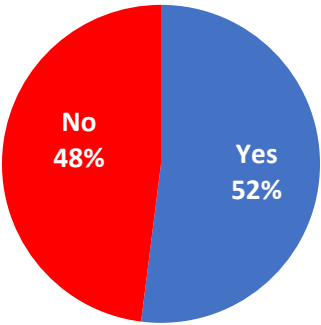
Saves money	16%
If a discount / lower price was offered	14%
If it would be easier / more convenient	12%
Nothing no interest	12%
Offer the option / let customers know of option	10%
I plan to, just haven't done it yet	10%
Everything is going online / no choice	8%
If easy to set up / access	6%
If there was online security	6%
Don't know	4%

Saving money, being offered a discount as well as issues related to convenience and being offered the option were most recalled.

All N=100 business customers were then asked if they manage their Greater Sudbury Hydro account online.

Q20. "Do you currently manage your GSH account Online?"

When asked if they manage their GSH account online, 52% said yes compared to the 47% in 2021 (43% in 2020).



The 52% (N=52) that manage their account online were asked Q21 to Q23 as follow-ups.

The 52% (N=52) that manage their account online were first asked in an unaided probe about the information they use on the online portal.

Q21. "What information do you use on the online portal?"

View bill / amount owing	71%
Transaction history / payments	8%
Usage / consumption	8%
Rates	6%
Account profile / details	4%
Smart meter	2%
Unsure / do not recall	2%

They (52%, N=52) were next asked in another unaided question about what information they would like to see added to the online portal.

Q22. "What information would you like to see added to the online portal?"

Unsure	63%
No others	19%
Change payment options	6%
Ways to save	6%
Outages	4%
Disconnection / reconnection	2%

The final unaided question asked to the 52% (N=52) that manage their account online was about the self serve options they would like to see added to the portal.

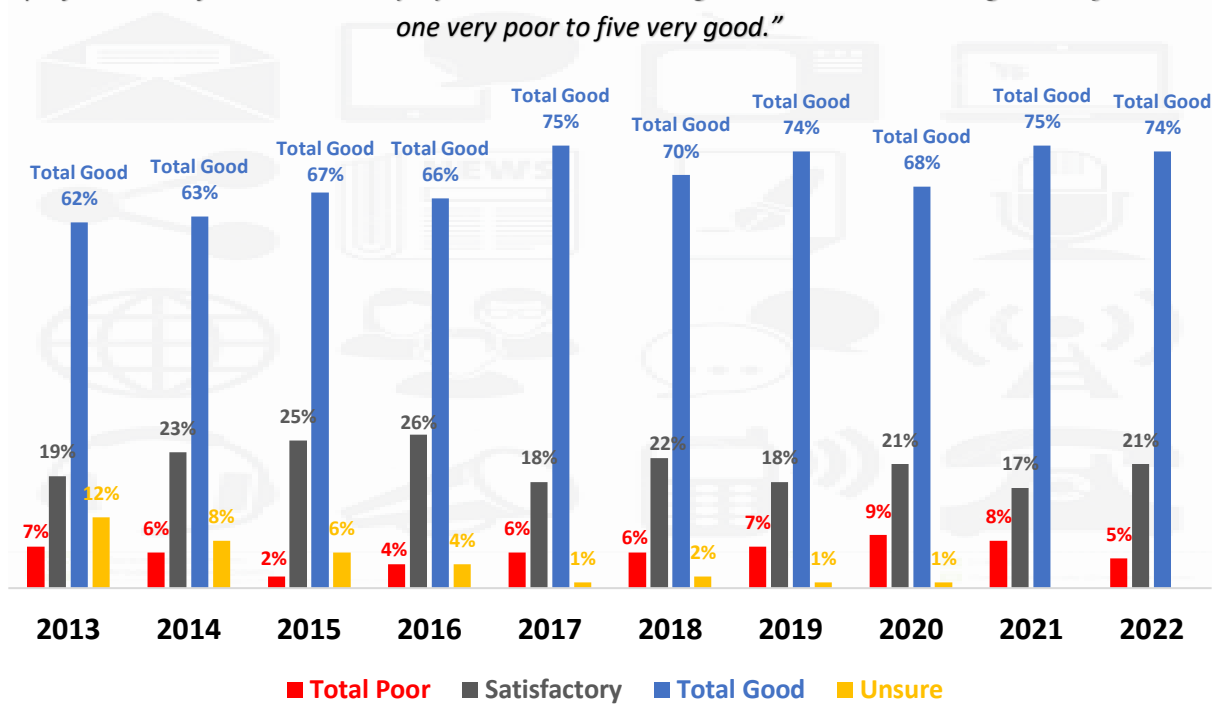
Q23. "What self-serve options would you like to see added to the online portal?"

Unsure	56%
No other	35%
Change payment options	6%
Pre-authorized payment enrollment	2%
Payment deferral / arrangements	2%

Communication

Respondents were asked to rate 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."

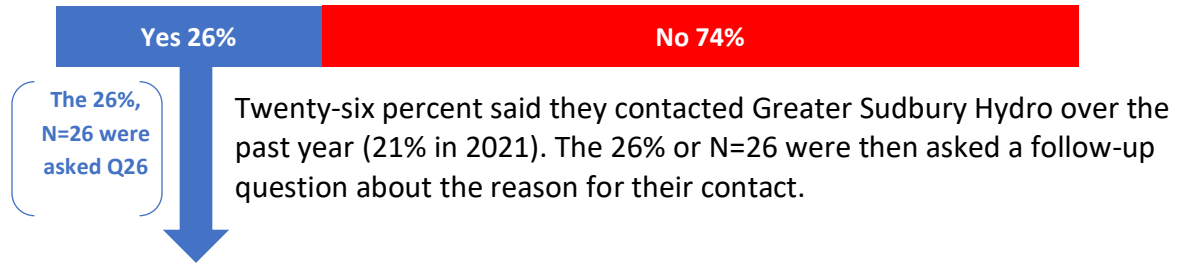


Nearly three-quarters of businesses rated communications as being good or very good, consistent with 2021.

Contact

The next set of probes were about recent contact with Greater Sudbury Hydro and communications with the utility. Businesses were first asked if they have contacted Greater Sudbury Hydro in the past 12 months.

Q25. "Over the past 12 months, have you contacted Greater Sudbury Hydro / Greater Sudbury Utilities?"



Q26. "What was the nature of your inquiry?"

Billing issues / inquiry	42%
Outages / information	27%
Change payment options / deferral	12%
Open or close account	8%
Energy savings program	8%
General inquiry	4%

Reasons for contacting Greater Sudbury Hydro related primarily to billing inquiries, areas around outages and account changes.

In an open or unaided question, all N=100 businesses were asked about how they would most like to communicate with Greater Sudbury Hydro.

Q27. "How would you like to communicate with Greater Sudbury Hydro?"

Email	67%
Telephone	28%
Social media	3%
Website form	1%
Text	1%

Email is the preferred method which 67% of business customers want to communicate with Greater Sudbury Hydro, next by telephone (28%).

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

Q28. “What communication option would you like to see Greater Sudbury Hydro offer in the future?”

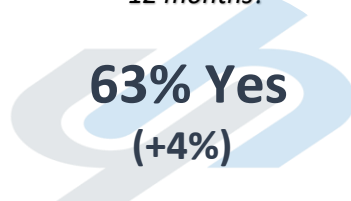
Email	56%
Text/SMS notifications	17%
Automated Chat/Virtual Assistant	17%
Live Chat	7%
Automated voice message	3%

Email was most named followed by text/SMS notifications and automated chat/virtual assistant.

Greater Sudbury Hydro Website

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

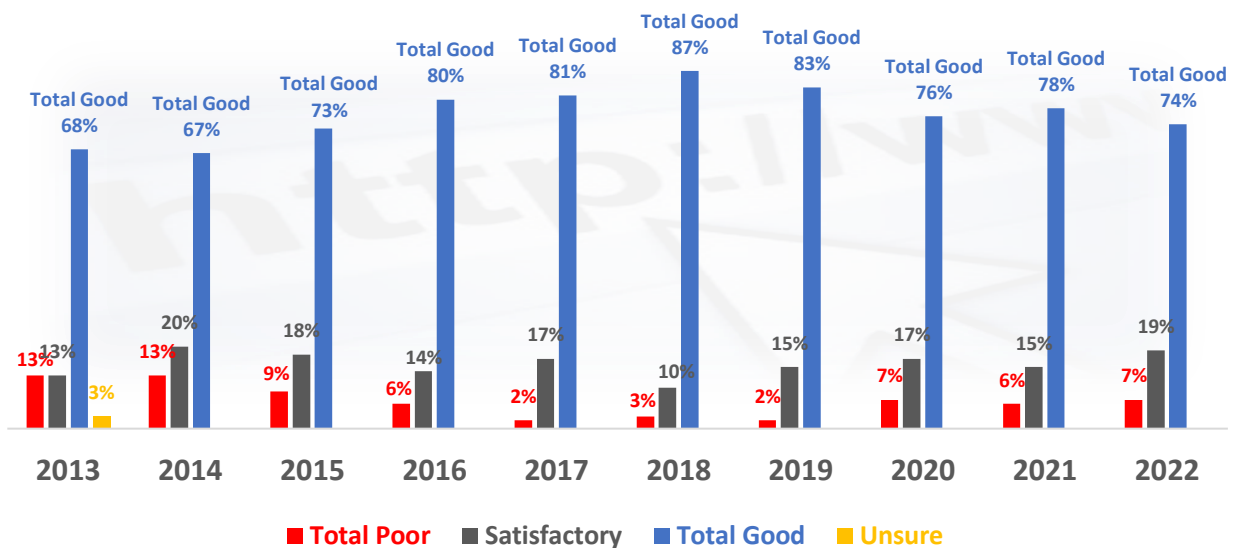
Q29. "Have you visited the Greater Sudbury Hydro or the Greater Sudbury Utilities website over the past 12 months?"



Sixty-three percent said they have visited the website(s) in the last year, up from 59% in 2021 (66% in 2020 & 48% in 2019).

The 63% (N=63) of visitors were then asked three follow up questions about the information the website contain. In the first, they were asked to rate the quality of the information provided.

Q30. "How would you rate the quality of the information provided on the Greater Sudbury Hydro website?"



The total good and very good rating for the quality of information on the website is 74% (-4%).

The N=63 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.

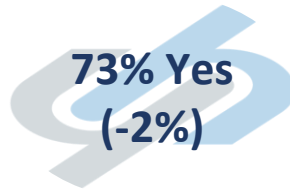
Q31. "What information did you look for?"

Account information	46%
Rates & Fees	30%
Energy conservation	24%
News or Developments	21%
Outages	10%
Corporate info	5%
Contact information	3%
Report an issue	2%

Most named was accessing account information, to find out about rates or fees, energy conservation and general news or developments.

In the final website question, the N=63 visitors were asked if they found the information on the website they were looking for. Results are consistent with 73% (75% in 2021) answering that they found the information they were look for.

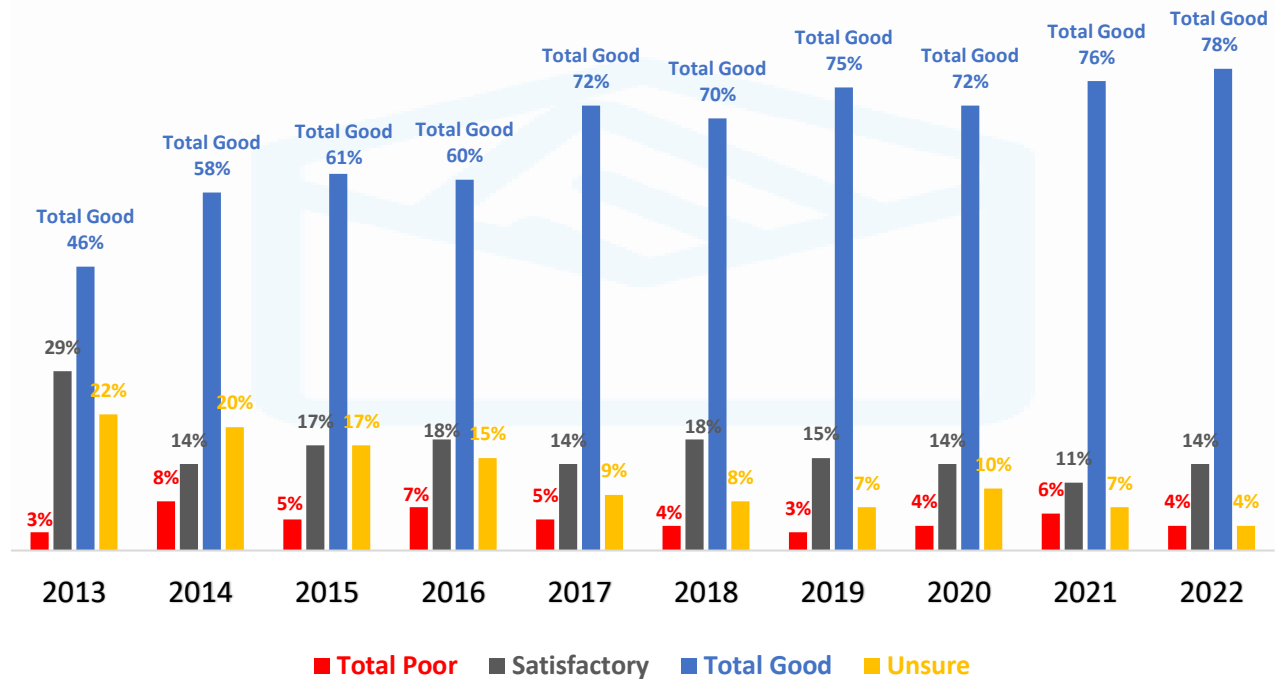
Q32. "Did the website provide you with the information you were seeking?"



Rating Bill Inserts & Links

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

Q33. "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? "

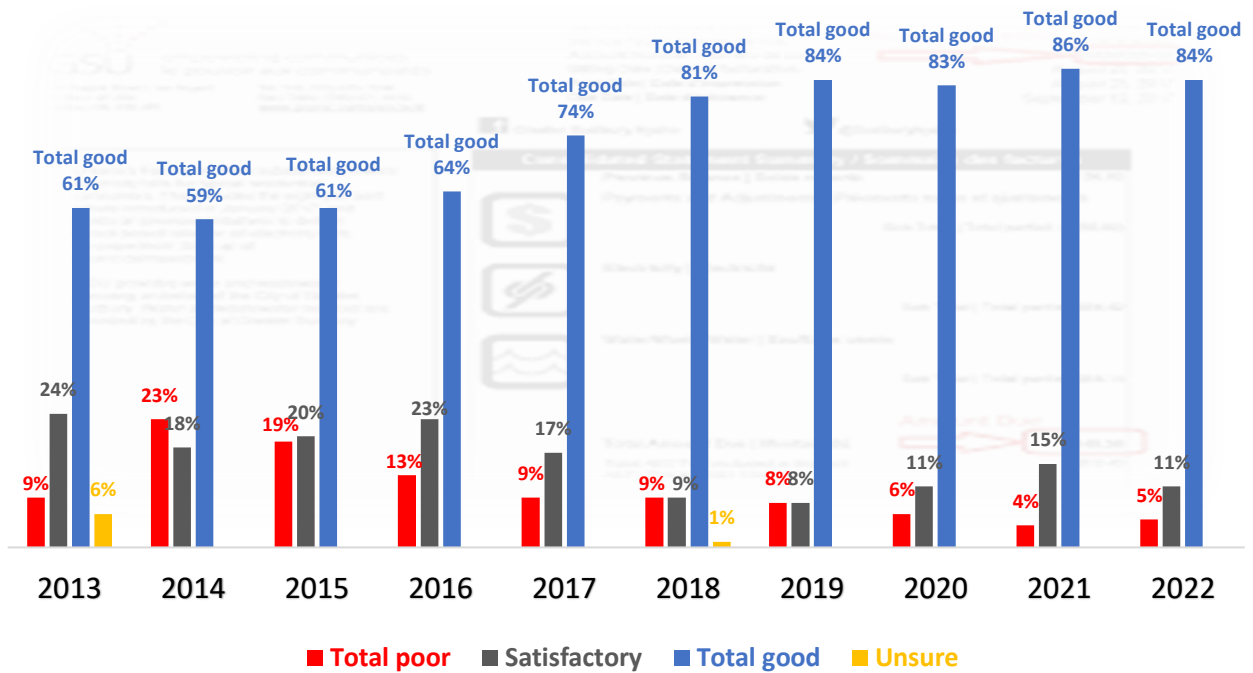


The good and very good rating provided for bill inserts or electronic bill links is 78%, up +2% from 2021.

Billing – Ease of Understanding

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

Q34. “Using a scale from one very poor to five very good, how would you rate how easy it is to read and understand your power or utility bill?”



Results are consistent over the past four survey periods with 84% 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.

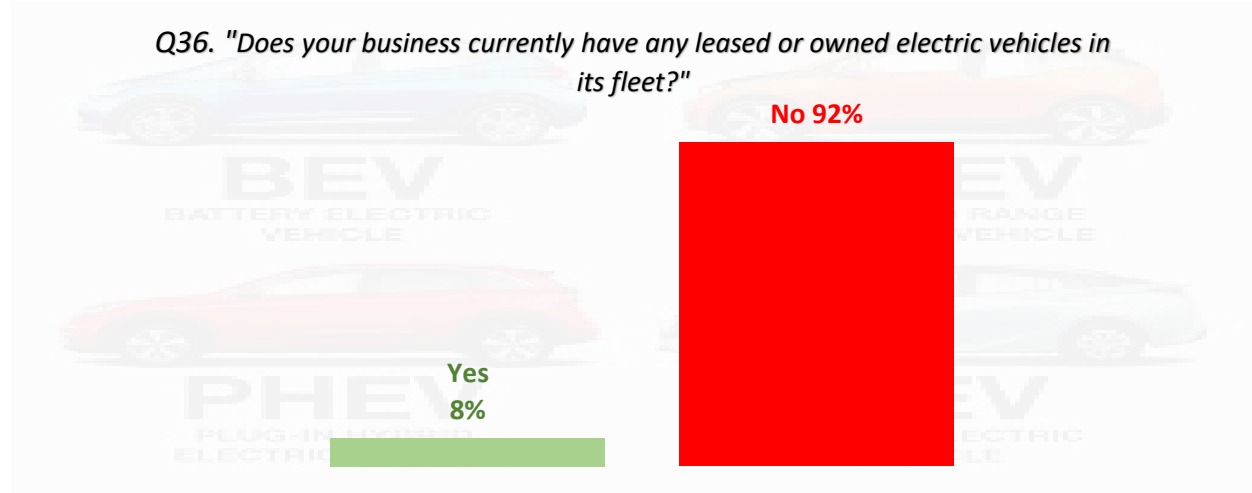
Q35. “What can Greater Sudbury Hydro do to better service its customers?”

Lower rates	42%
Maintain rates / no increases / freeze	23%
Don't know	18%
Fewer outages / quicker response to outages	5%
More information on how to save / conserve energy	4%
Incentives / programs for reducing electricity	4%
Information on what is involved in the price of hydro	2%
Be easier to reach	2%

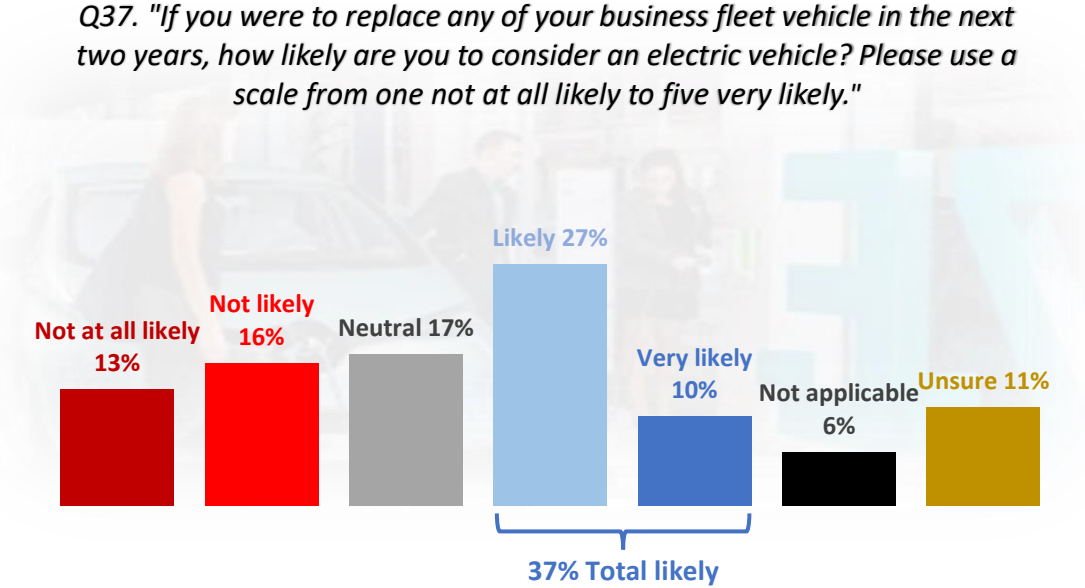
With one top of mind answer accepted, cost or price issues including have lower prices and no rate increases were most named.

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 8% said yes (7% in 2021).



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-seven percent said they are likely or very likely to consider the purchase of an electric vehicle over the next 24 months (35% in 2021).

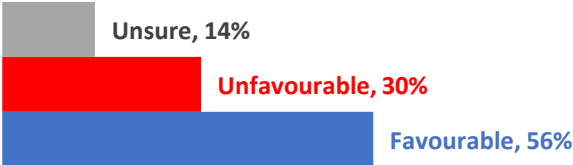
Energy Self Generation & Storage

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 had a favourable or unfavourable opinion of each and then about their interest in generating and storing electricity.

Q38. "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?"



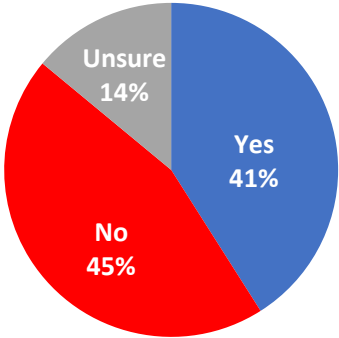
Q39. "Do you have a favourable or unfavourable opinion of energy storage or the ability to store electricity generated from rooftop solar panels?"



Fifty-nine percent or (51% in 2021) have a favourable opinion of energy self generation that would lower their energy consumption and energy costs while 56% (48% in 2021) said they have a favourable opinion of energy storage.

When then asked if they would be interested in generating and storing some or all of the electricity needed for their business, 41% said yes (33% in 2021).

Q40. "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.

Q41. "What would motivate you to install an energy generation and or storage system for your business?"

Cost	34%
Nothing	24%
Need more information	15%
What is the payback on investment	14%
Unsure	7%
Lower utility bills	6%

Knowing more about the cost, payback, and how bills would be lowered were the main motivators mentioned.