

December 2014 Customer Survey Report

Prepared by:



For:

Greater Sudbury Utilities

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METHODOLOGY & LOGISTICS

OVERVIEW

- This report represents the findings from a survey of Greater Sudbury Hydro (GSH) customers conducted by Oraclepoll Research Limited for Greater Sudbury Utilities (GSU).
- Greater Sudbury Utilities provided Oraclepoll with databases of their residential and business hydro customers to be surveyed.
- A total of 400 residential and 100 business surveys were conducted between the days of November 25th to December 1st 2014 using person to person live telephone interviewing.
- The margin of error for the 400-person residential survey is +/- 4.9%, 19/20 times and +/- 9.8%, 19/20 times for the business component.

SURVEY METHOD

- GSU provided Oraclepoll Research Limited with a customer list to be used as a sample frame from which a randomized sample was selected for interviewing.
- The survey was conducted using computer-assisted techniques of telephone interviewing (CATI) and random number selection. A total of 20% of all interviews were monitored and the management of Oraclepoll Research Limited supervised 100%.
- Some results may not add up to 100% as a result of rounding.

LOGISTICS

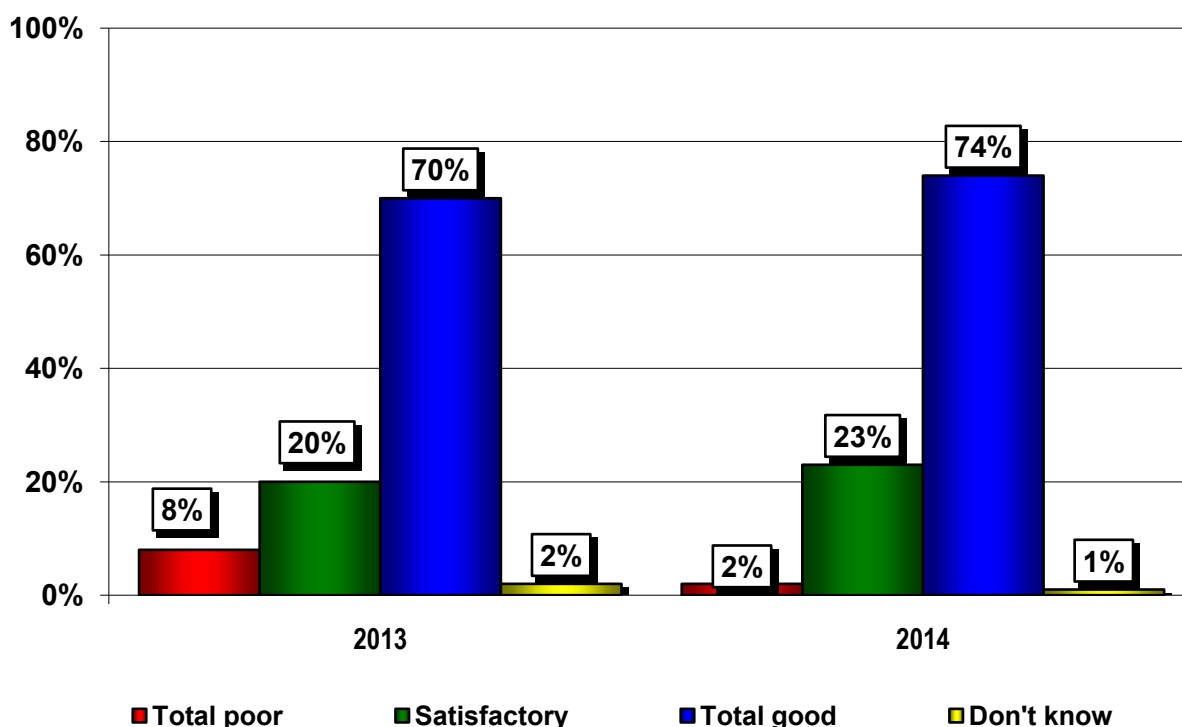
- Initial calls were made between the hours of 5 p.m. and 9 p.m. Subsequent callbacks of no-answers and busy numbers were made on a (staggered) daily rotating basis up to 5 times (from 10 a.m. to 9 p.m.) until contact was made. In addition, telephone interview appointments were attempted with those respondents unable to complete the survey at the time of contact.

EXECUTIVE SUMMARY-RESIDENTIAL

SATISFACTION

Respondents were first asked the following.

“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?”

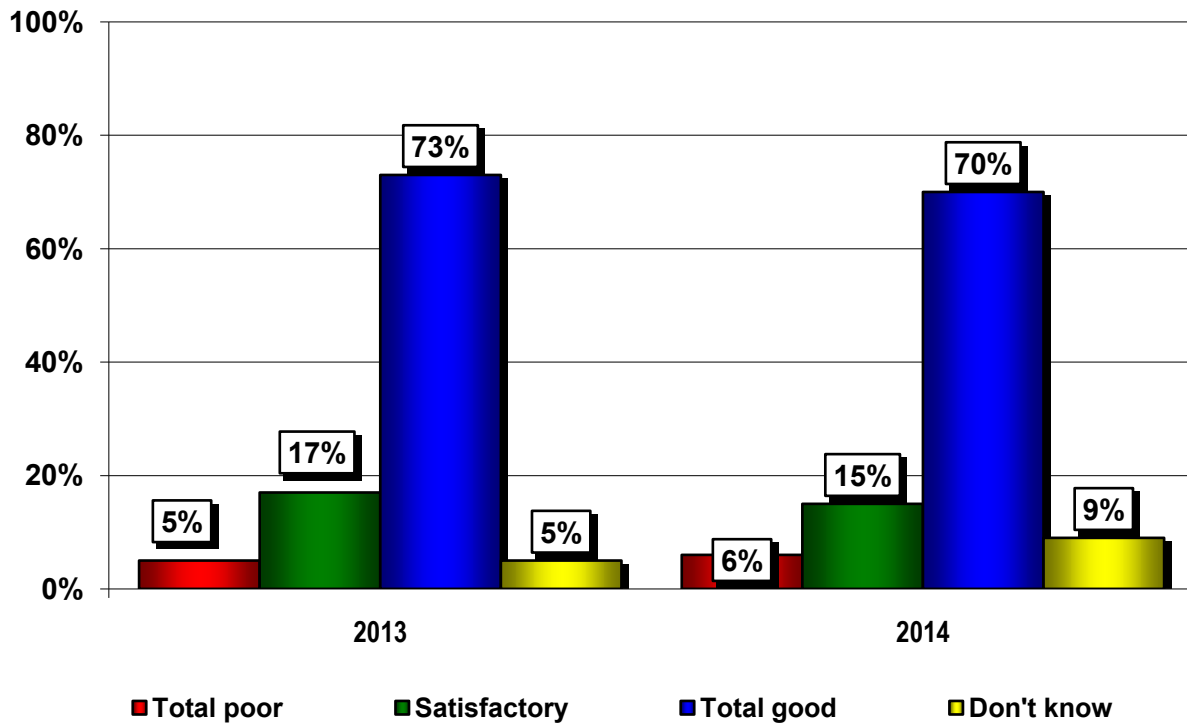


There was a hike in the good and very good combined score by 4% in 2014 compared to 2013 and a reduction in the poor rating by 6%. In addition there was an increase in the satisfactory / neutral invocator by 3% bringing the top three (satisfactory, good & very good)) rating to 97% and stronger than the 90% in 2013.

CUSTOMER SERVICE

Residential customers were then asked the following comparative service question.

“How would you rate Greater Sudbury Hydro's customer service (i.e. being responsible and reliable) compared to other service providers such as your heating fuel, Telephone Company or your cable TV or satellite provider?”

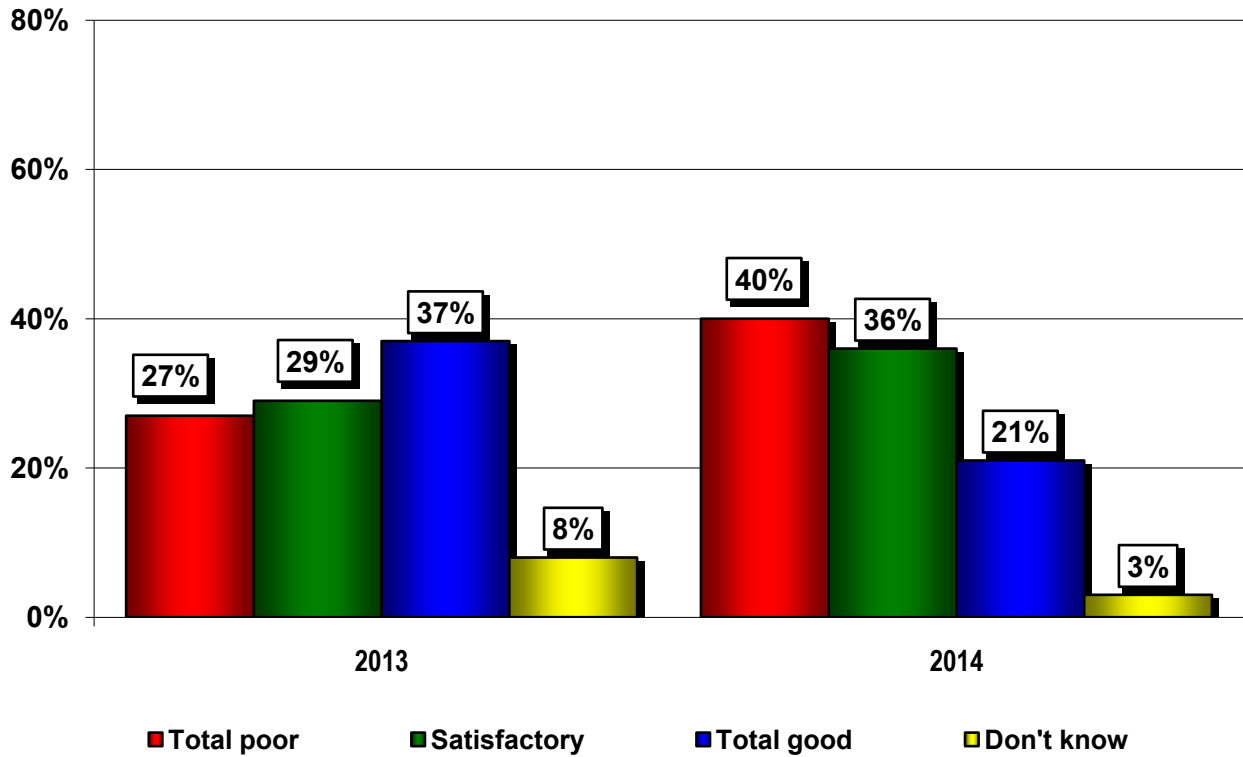


The comparative customer service ratings are similar for the most part with the poor and satisfactory scores remaining consistent. However, there was a slight drop in the total good score and a correspondent increase in the do not know or unsure category.

PRICE COMPARISON

A comparative price question was then asked.

“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, telephone company or your cable TV and satellite provider)?”

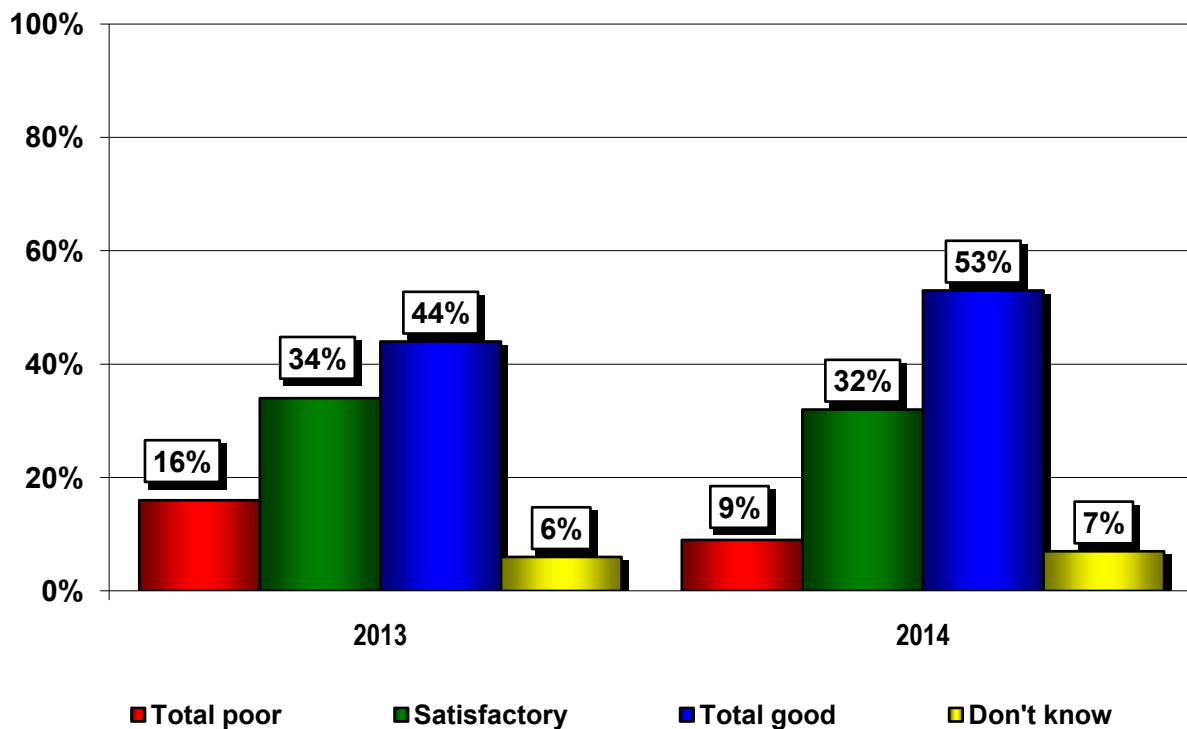


The one area or indicator that did see a drop in this survey period was related to cost or the price paid in relation to other essential services. There was a 16% decrease in the total good score and a 13% hike in the total poor category. In addition, the satisfactory rating also increased by 7% while the number of do not know answers dropped by 5%.

OVERALL VALUE

Customers also rated the overall value that Greater Sudbury Hydro provides.

“Using the same scale from one very poor to five very good, how would you rate the overall value that Greater Sudbury Hydro provides?”



Despite the drop in the comparative cost rating, more customers do see value in the service that their utility provides. More than half or 53% rated the value of what GSU provides them with as good or very good an increase of 9% over 2013, while only 9% rated this area as poor a drop of 7%. The satisfactory and unsure numbers have remained roughly consistent.

RATING GREATER SUDBURY HYDRO

Respondents were then asked to rate their level of agreement with a series of descriptive statements about Greater Sudbury Hydro.

“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.”

	TOTAL AGREE	
	2013	2014
Greater Sudbury Hydro meets its commitment to customers.	80%	76%
Greater Sudbury Hydro provides customers with reliable and good service.	77%	75%
Greater Sudbury Hydro encourages efficient use of electricity among its customers.	62%	72%
Greater Sudbury Hydro provides its customers with information about programs to help customers reduce their energy costs.	58%	71%
Greater Sudbury Hydro is concerned about public safety and safe work practices.	48%	63%
Greater Sudbury Hydro is committed to effectively managing a balanced budget.	25%	33%
Greater Sudbury Hydro invests in and gives back to the community (e.g. through sponsorship / donations; school safety program and support for other activities).	22%	28%

Five of the seven areas covered witnessed increases over the 2013 survey period. The highest levels of agreement continue to be with respect to meeting commitment to customers and providing reliable and good service, despite slight drops. There was a solid increase (total agreement) in the area related to conservation and energy efficiency as 10% more now agree that GSU encourages the efficient use of electricity. As well there was a 15% gain in agreement levels in the area of the GSU being concerned about public safety and safe work practices. The areas that continue to be rated lowest, despite increases in agreement compared to 2013, were for balancing the budget and giving back to the community. However, it should be noted that there were a high number of respondents that answered do not know to each (balancing budget - 45% and back to the community - 52%) revealing a lack of awareness among the public in both these areas.

RATING PERFORMANCE

Respondents were then asked to rate the performance of Greater Sudbury Hydro across four indicators.

“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.”

	TOTAL GOOD	
	2013	2014
The reliability of power supply	83%	92%
Prompt responses to power outages when they occur	72%	82%
Effectively communicating with customers about planned power interruptions in your area	55%	56%
Effectively scheduling planned power outages	57%	54%

In the key rating areas of keeping the lights on and restoring them when off, GSU customers are very satisfied. A high 92% rated the reliability of their power supply as good or very good, a 9% increase compared to 2013 and 82% provided a total good score for the prompt response to outages when they occur, a 10% improvement. Results are lower and consistent in the areas of communicating planned outages (56%) and scheduling planned outages (54%).

RATES VS OUTAGES

A question was asked related to the cost customers are willing to pay for electricity in relation to service delivery or keeping the lights on.

“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-OUTAGES	2013	2014
1-lowest rates – regular outages	2%	4%
2-low rates – occasional outages	15%	3%
3-neutral – a balance between rates and outages	44%	55%
4-high rates – only a few outages	15%	13%
5-highest rates – no outages	3%	5%
Don't know	22%	21%

Most customers or 55% continue to want a balance between rates and outages, as 11% more now prefer this option compared to the 2013 survey. Fewer or 3% now are willing to have low rates and occasional outages, a 12% drop over 2013, while a consistent 13% prefer high rates with a few outages.

PAYMENT OPTIONS

Respondents were asked about their interest in a series of payment options for their electricity bill payments.

“Please tell me if you are interested in each of the following payment methods for your electricity bills?”

PAYMENT METHODS	2013	2014
Automatic withdrawal from your bank account	43%	52%
Online / telephone banking through your financial institution	65%	48%
Equal monthly payment plan	40%	47%
Online at the Sudbury Hydro Website	20%	15%
Payment at the Greater Sudbury Hydro office	23%	10%

Automatic withdrawal, online banking and equal monthly payments were the most favoured options. More customers now have an interest in automatic withdrawal (+9%) and equal monthly payments (+7%), while 17% fewer prefer online or telephone banking. In addition, payment through the GSU website and at the GSU office remain low and lower than 2013.

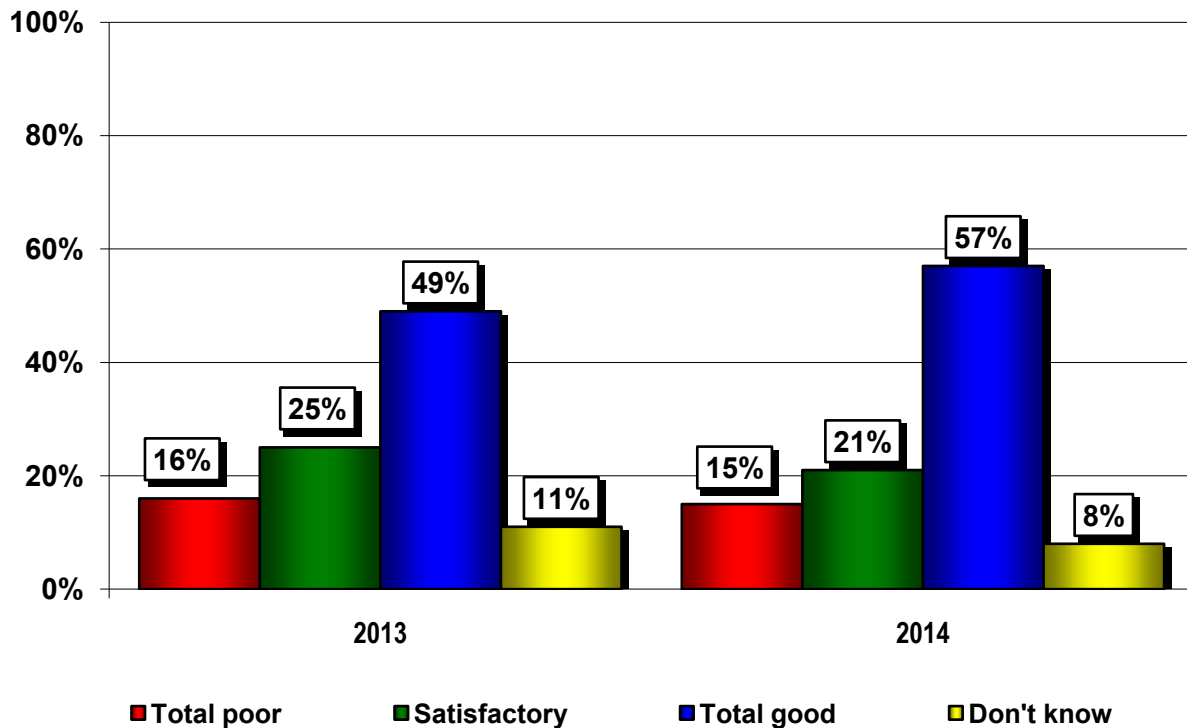
Those respondents that provided multiple responses of yes to each of the payment methods were then asked which one was their most preferred. Automatic withdrawal was most named as the top choice by 52%, followed by online or telephone banking by 31% and equal monthly payments by 11%.

A total of 15% of residential customers surveyed said that they currently receive their hydro bill electronically (7% in 2013). Among those that do not receive an electronic bill, 20% stated that they would be willing to obtain their bill via this method (21% in 2013).

COMMUNICATION

A series of questions were asked about communications starting off with an overall rating.

“Please rate the performance of Greater Sudbury Hydro in communicating with its customers using a scale from one very poor to five very good ?”



A total of 57% now rate the GSU as being very good or good in communicating with customers an 8% increase compared to 2013. While the negative rating remained similar, there were drops in the satisfactory (-4%) and do not know (-3%) scores.

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

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

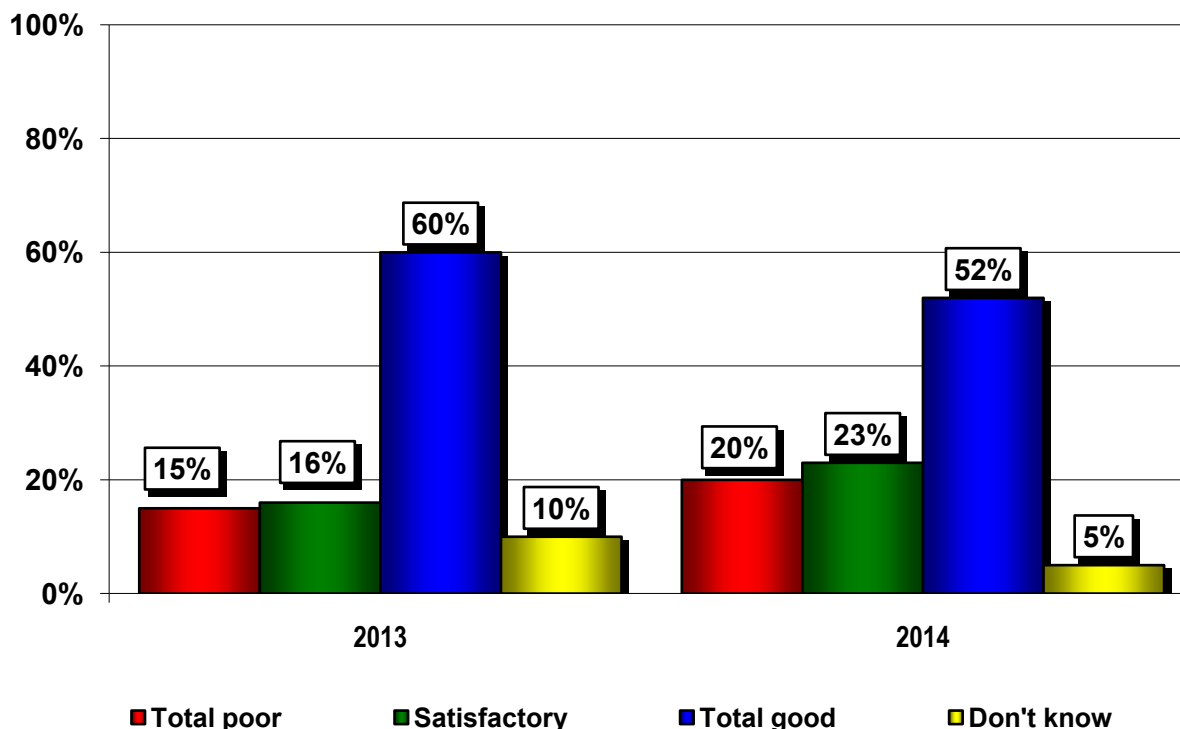
METHOD OF COMMUNICATION	2014
Bill inserts	31%
Direct mail	30%
Email from the company	21%
Don't know / no preference	6%
Customer newsletter	3%
Radio advertising	4%
Newspaper advertising	4%
Greater Sudbury Hydro Website	1%

Bill inserts, direct mail and emails from the GSU were the top or most preferred methods to be communicated with. Respondents were then asked about how that they would like to communicate with the utility. A 64% majority said by telephone, while other responses included email (15%), regular mail (8%), at the GSU office (5%), social media (3%) and a link on the GSU website (1%). A total of 4% did not know or were unsure.

WEBSITE

Respondents were first asked if they had visited the Greater Sudbury Hydro website over the course of the last year of which 27% said that they had (24% in 2013). Website visitors were then asked a follow up question.

“How would you rate the quality of the information provided on the Greater Sudbury Hydro website?”



Slightly more than half or 52% rated the quality of the information on the website as good or very good lower than the 60% in 2013.

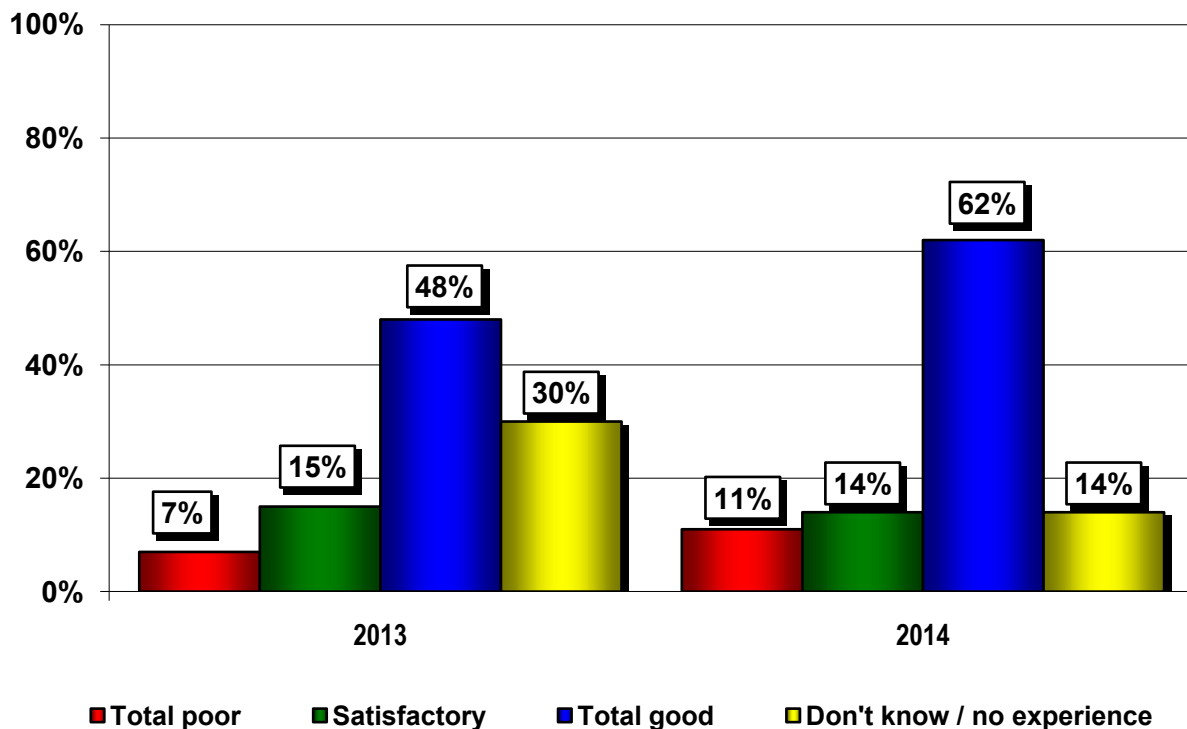
Website visitors were also asked about the information that they were looking for, with 50% naming account information, 25% something about rates or fees, 15% information on energy conservation and 6% corporate information. A high 71% did claim that they found the information that they were looking for (71% in 2013).

In addition, all respondents were asked if they would be interested in managing their account online with more than three in ten or 31% stating that they would.

PRINT MATERIAL

Respondents then rated the print material provided by Greater Sudbury Hydro.

“Using a scale from one very poor to five very good, how would you rate the overall quality of each of the bill inserts and other printed material you have received from Greater Sudbury Hydro?”

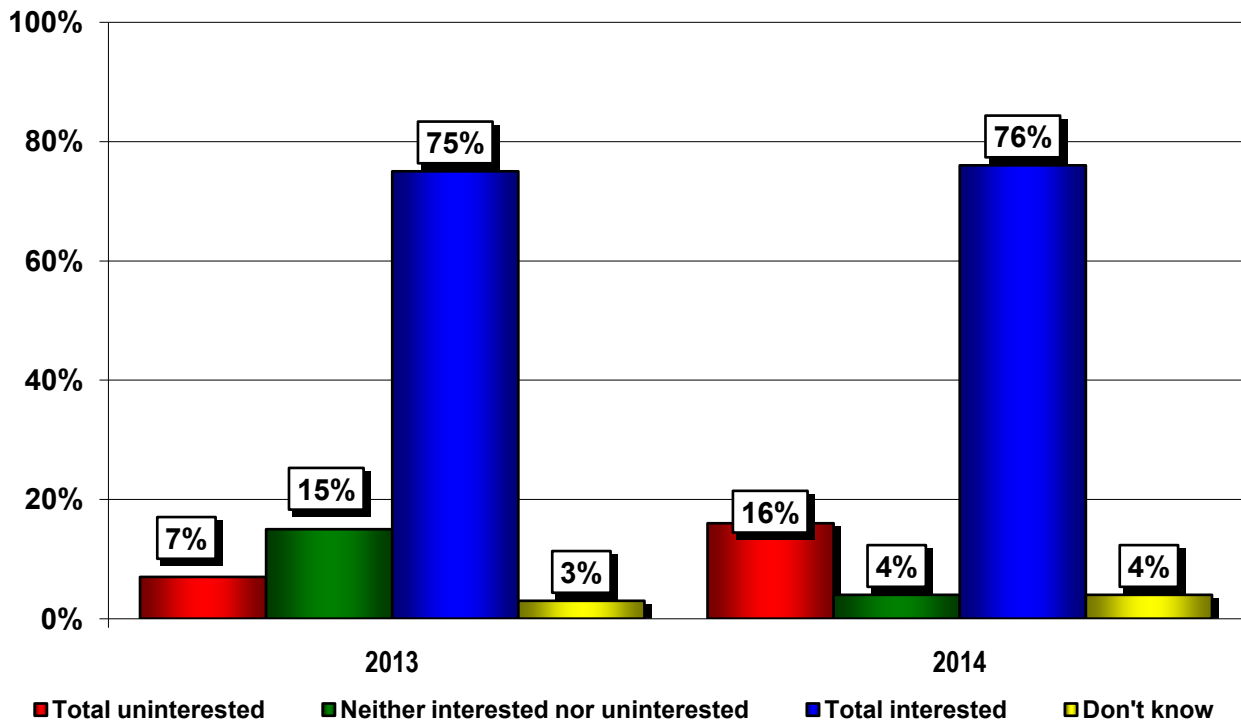


The quality of print material received a 62% good or very good rating, a solid 14% hike over the 48% one provided in 2013, while the percentage of do not know or no experience answers dropped significantly by 16%.

ENERGY EFFICIENCY

A question was then asked about consumer interest in information about home energy efficiency and cost savings.

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

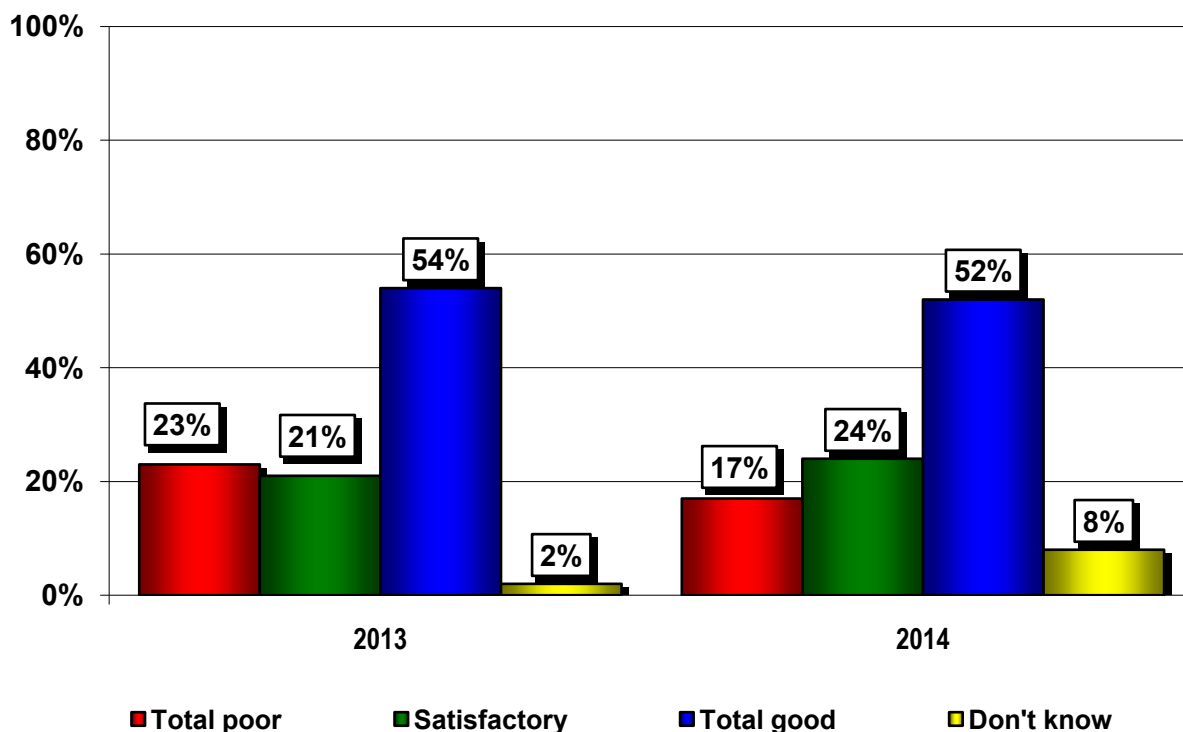


A strong 76% majority expressed interest in having Greater Sudbury Hydro provide them with information that can save them money by making their home more energy efficient, consistent with the last survey period.

BILLING – EASE OF UNDERSTANDING

Respondents were questioned about their energy bill.

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



A total of 52% of residential consumers provided a good or very good score for the ease of understanding or reading their utility bill, 17% a poor or very poor rating, 24% gave it a satisfactory grade and 8% answered do not know. While the positive rating remained similar, there was a drop in the negative score, but an increase in the satisfactory and do not know categories.

IMPROVEMENT COMMENTS

The following open ended question was asked to all respondents.

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

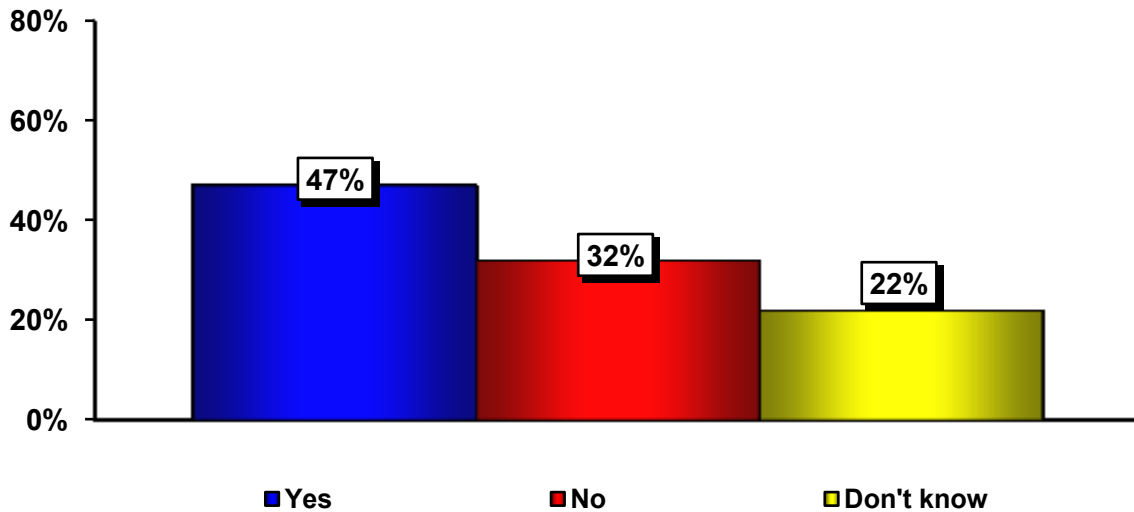
TOP TEN COMMENTS	2014
Don't know	45%
Lower rates	27%
Make bills easier to understand / more clearer	10%
More information on how to save / conserve energy	7%
Improve customer service	4%
Ability to bundle all utilities	2%
More information on alternative energy options	1%
Improve the website / make it more user friendly	1%
Difficult to reach	1%
Invest in alternative energy sources	1%

While 45% did not know what could be done, among those with an opinion lower rates was most named (27%), next followed by making bills clearer or easier to understand (10%), providing more information on conservation or how to save energy (7%) and improving customer service (4%).

ENERGY INSIGHTS REPORT

A series of new questions were asked to respondents about the Energy Insights Report.

"Did you receive an "Energy Insights" report from Greater Sudbury Hydro?"



A total of 47% of GSU customers surveyed stated that they received a copy of the Energy Insights report.

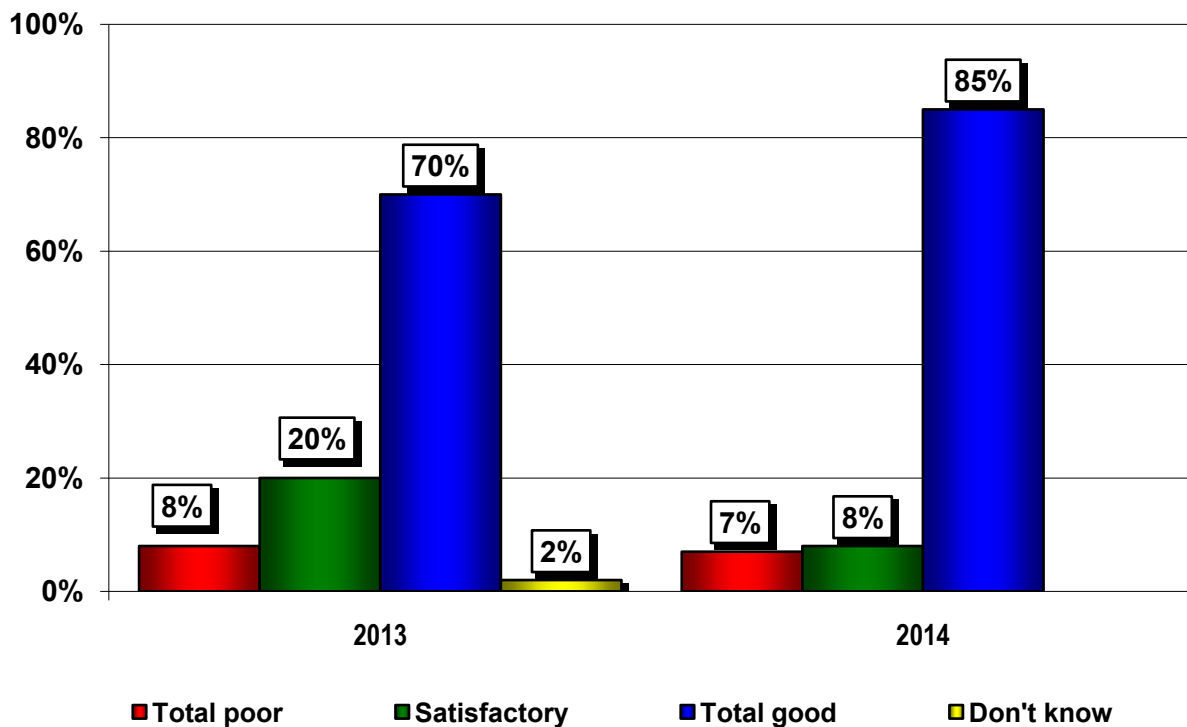
When the 47% that received a copy were asked if they acted on the information and suggestions in the report, 51% said that they did. Those that acted on the information and suggestions were then questioned as to whether they would like to see more information like this in the future with a high 89% saying that they would.

EXECUTIVE SUMMARY- BUSINESS

SATISFACTION

Business customers were first asked the following.

“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?”

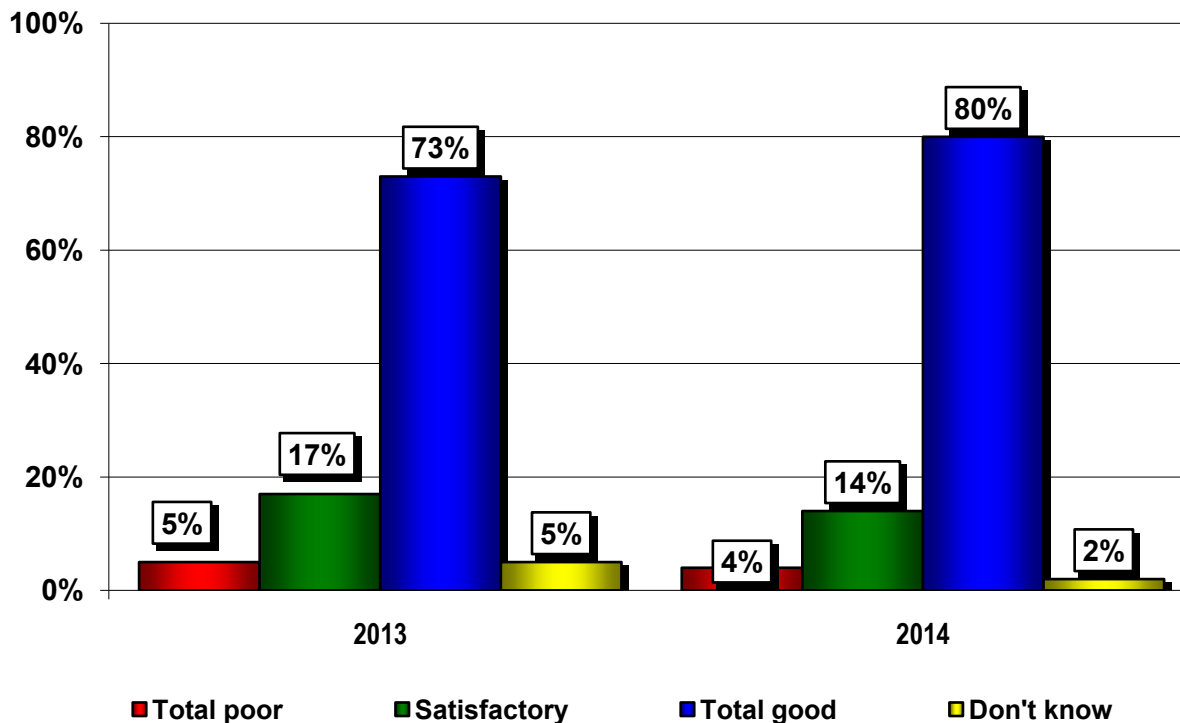


Among business customers there was a significant increase in the overall satisfaction score in this survey period by 15% compared to 2013. This gain was a result of a shift from the neutral or satisfactory rating to the positive category.

CUSTOMER SERVICE

Customers were then asked the following comparative service question.

“How would you rate Greater Sudbury Hydro's customer service (i.e. being responsible and reliable) compared to other service providers such as your heating fuel, Telephone Company or your cable TV or satellite provider?”

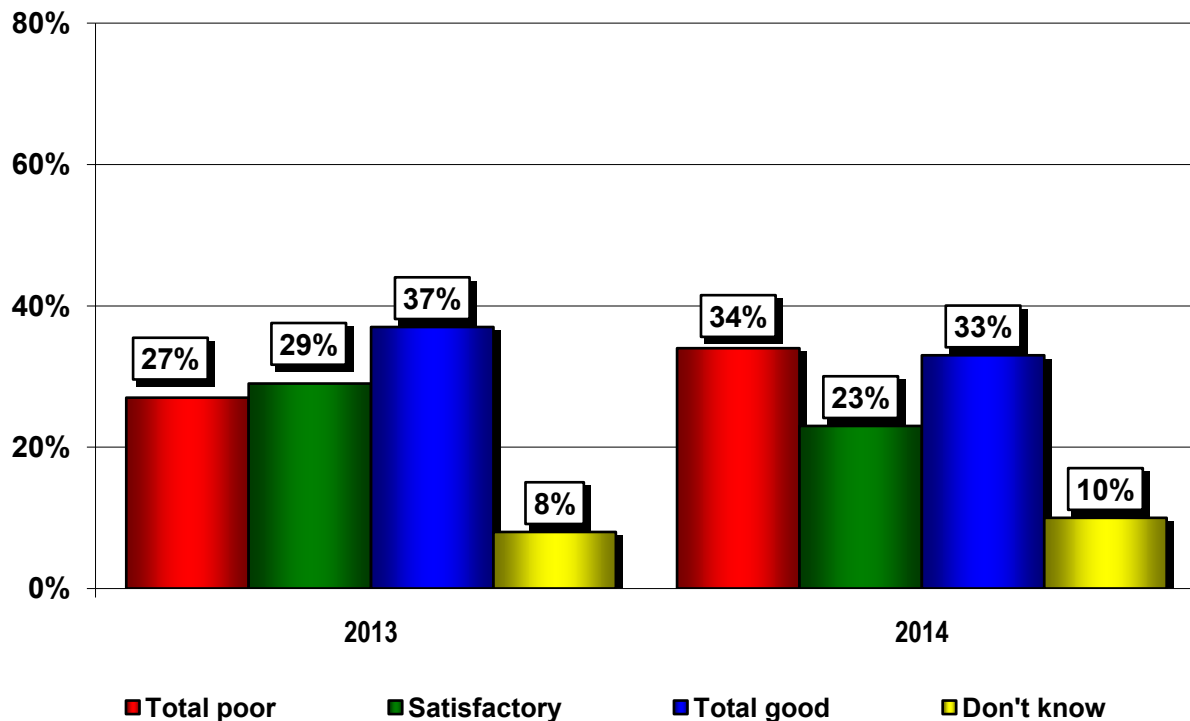


The business cohort also rates GSU high in the comparative customer service area with eight in ten or 80% providing a good or very good rating, a 7% spike over 2013.

PRICE COMPARISON

A comparative price question was then asked.

“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, telephone company or your cable TV and satellite provider)?”

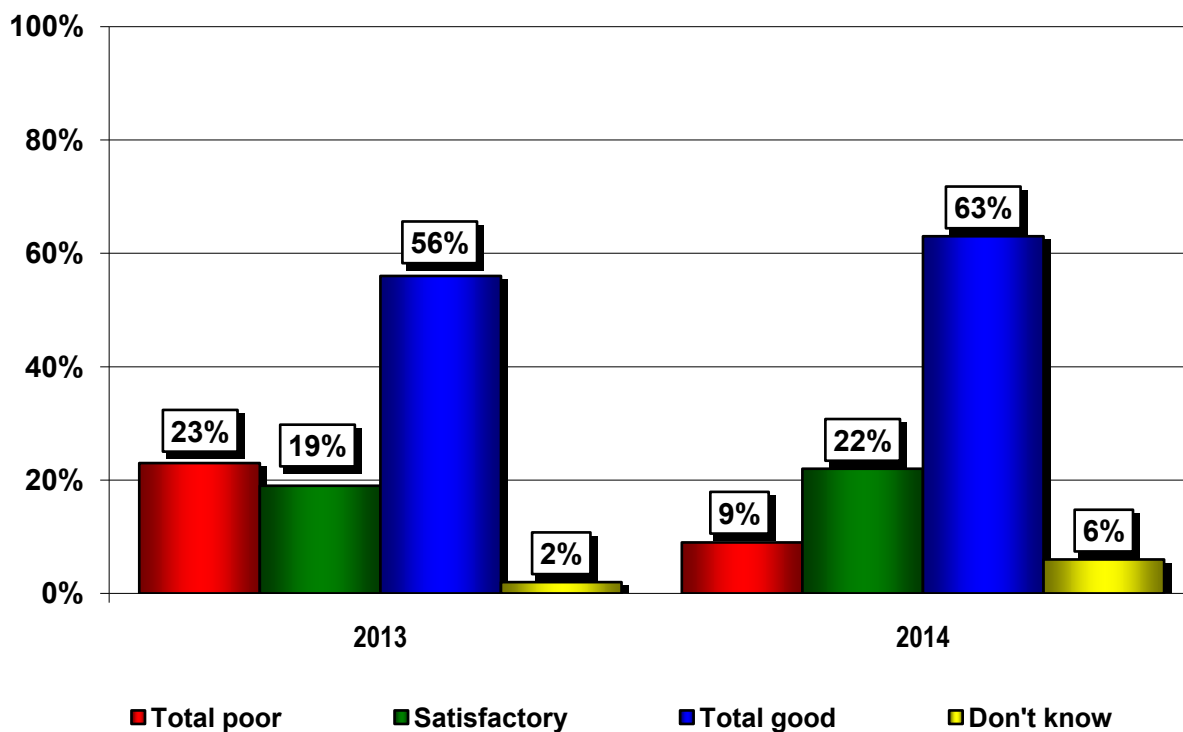


The comparative price indicator or the cost or the price paid in relation to other essential services continues to be weak with 33% providing a good or very good score a 4% drop over 2013. While the satisfactory rating fell by 6%, the negative total poor rating increased by 7%.

OVERALL VALUE

Customers also rated the overall value that Greater Sudbury Hydro provides.

“Using the same scale from one very poor to five very good, how would you rate the overall value that Greater Sudbury Hydro provides?”



Despite the low comparative cost rating, most have a positive or satisfactory opinion of the value that GSU provides. More than six in ten businesses or 63% rated the value of their utility as good or very good, a 7% increase compared to 2013, while only 9% rated it as poor or very poor, a 14% decrease.

RATING GREATER SUDBURY HYDRO

Business respondents were then asked to rate their level of agreement with a series of descriptive statements about Greater Sudbury Hydro.

“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.”

	TOTAL AGREE	
	2013	2014
Greater Sudbury Hydro provides customers with reliable and good service.	69%	89%
Greater Sudbury Hydro meets its commitment to customers.	69%	86%
Greater Sudbury Hydro is concerned about public safety and safe work practices.	65%	58%
Greater Sudbury Hydro encourages efficient use of electricity among its customers.	55%	75%
Greater Sudbury Hydro provides its customers with information about programs to help customers reduce their energy costs.	65%	71%
Greater Sudbury Hydro invests in and gives back to the community (e.g. through sponsorship / donations; school safety program and support for other activities).	38%	29%
Greater Sudbury Hydro is committed to effectively managing a balanced budget.	25%	21%

There were strong increases in agreement levels in four of the seven categories and a 7% decrease in terms of agreement for GSU's commitment to safety. The strongest agreement however was with respect to GSU providing good and reliable service (89%) a 20% increase compared to 2013, closely followed by meeting its commitment to customers (86%) a 17% gain. Also rated highly in terms of agreement were for encouraging the efficient use of electricity (+20) and providing information about programs to reduce energy costs (+6%). While there were low agreement numbers for investing in the community and effectively managing a balanced budget, a high number of respondents were unaware answering do not know to these questions (51% and 44% respectively).

RATING PERFORMANCE

Respondents were then asked to rate the performance of Greater Sudbury Hydro across four indicators.

“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.”

	<i>TOTAL GOOD</i>	
	2013	2014
The reliability of power supply	91%	90%
Prompt responses to power outages when they occur	74%	73%
Effectively scheduling planned power outages	61%	59%
Effectively communicating with customers about planned power interruptions in your area	62%	53%

Results are similar in the two survey touch points for responding to outages when they occur and for scheduling planned outages, but there was a drop in the communication with customers about planned outages indicator by 9%.

RATES VS OUTAGES

A question was asked related to the cost customers are willing to pay for electricity in relation to service delivery or keeping the lights on.

“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-OUTAGES	2013	2014
1-lowest rates – regular outages	3%	4%
2-low rates – occasional outages	6%	3%
3-neutral – a balance between rates and outages	57%	58%
4-high rates – only a few outages	12%	18%
5-highest rates – no outages	9%	3%
Don't know	13%	14%

Results are consistent in both surveys with most continuing to want a balance between rates and outages.

PAYMENT OPTIONS

Respondents were asked about their preferred payment options.

“Please tell me if you are interested in each of the following payment methods for your electricity bills?”

PAYMENT METHOD	2013	2014
Automatic withdrawal from your bank account	22%	43%
Online / telephone banking through your financial institution	51%	42%
Equal monthly payment plan	36%	41%
Payment at the Greater Sudbury Hydro office	25%	28%
Online at Sudbury Hydro Website	20%	16%

Automatic bank withdrawal, online or telephone banking and having equal monthly payment plans were the most preferred payment methods. More now prefer automatic withdrawal compared to 2013 (+21%) as well as having equal monthly payments (+5%), while fewer businesses want online or telephone banking (-9%). Demand continues to be lowest for payment at the GSU office and for online payments at the GSU website.

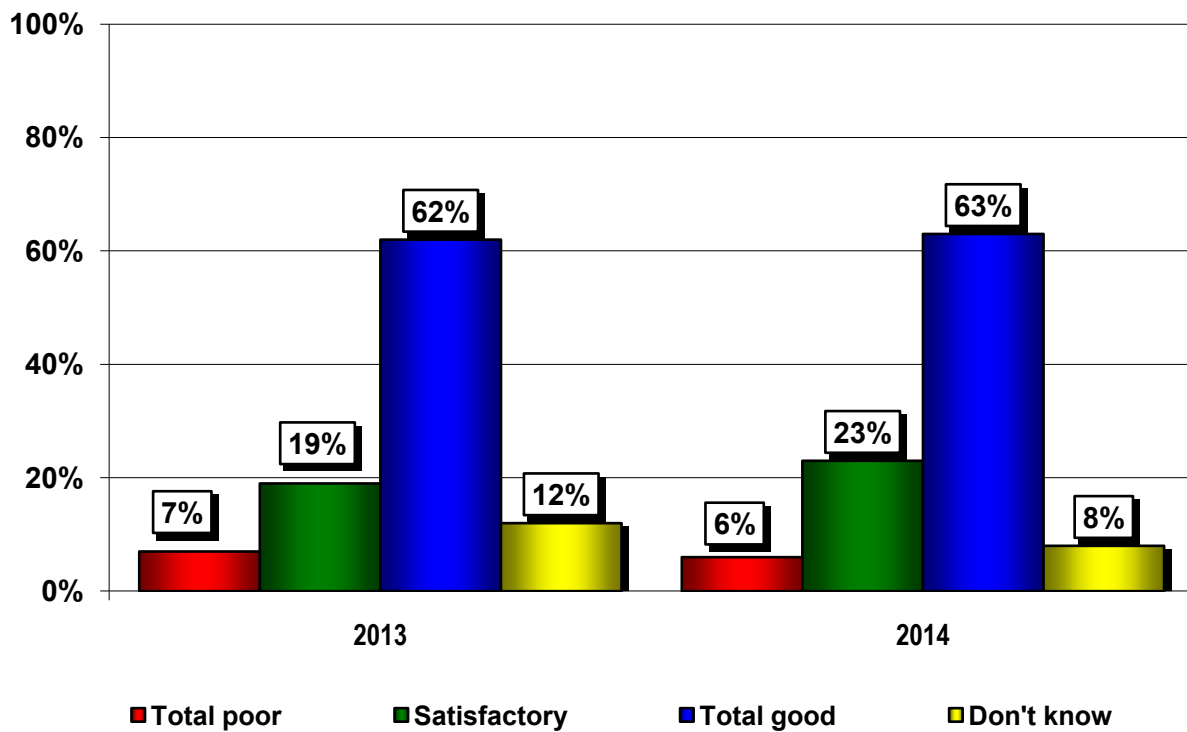
Those respondents that provided multiple responses of yes to the payment method question were then asked which one was their most preferred. Automatic bank withdrawal came up as the top choice by 41%, followed by online or telephone banking (23%), payment at the office (19%) and equal monthly payments (17%).

A total of 11% of business customers surveyed said that they currently receive their hydro bill electronically (6% in 2013). Among those that do not receive an electronic bill, 28% stated that they would be willing to obtain their bill via this method (33% in 2013)

COMMUNICATION

A series of questions were asked about communications, starting off with an overall rating.

“Please rate the performance of Greater Sudbury Hydro in communicating with its customers using a scale from one very poor to five very good?”



Results are consistent for the total good score in both surveys, while the total poor rating and do not know answers dropped to the favour of the satisfactory response category.

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

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

METHOD OF COMMUNICATION	2014
Bill inserts	35%
Direct mail	29%
Email	19%
Telephone	6%
Radio	4%
Customer newsletter	4%
Newspaper advertising	3%

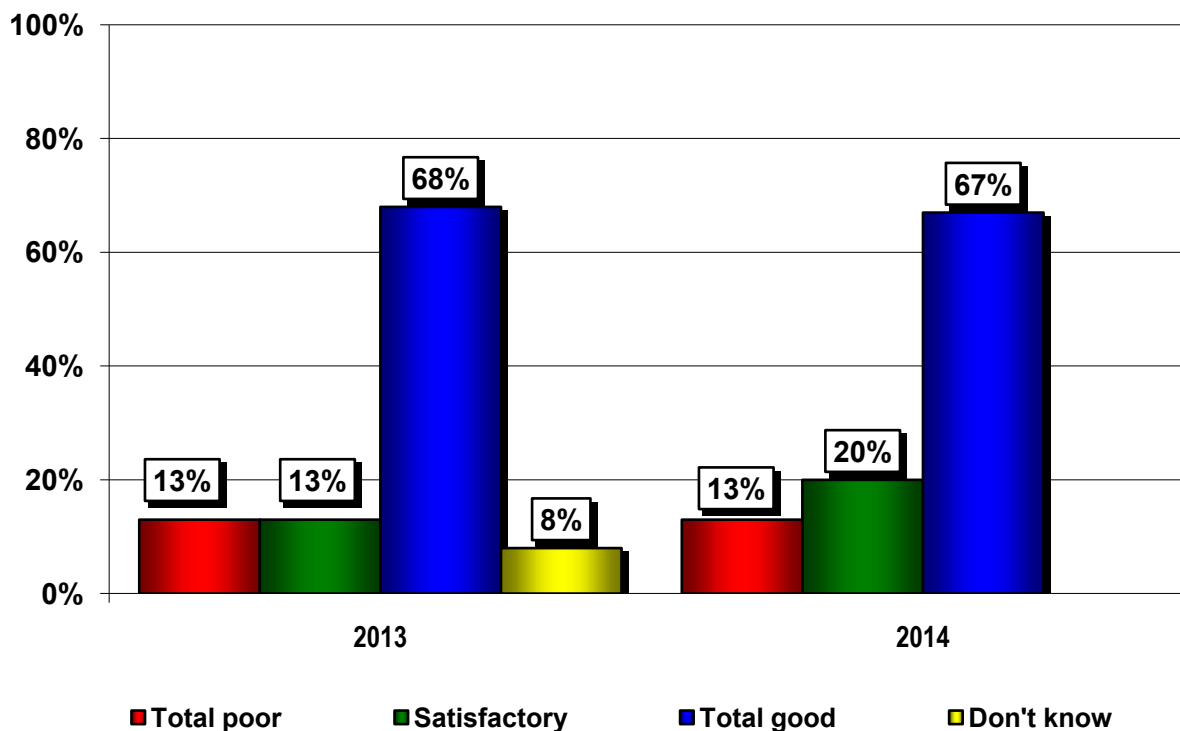
Business customers named bill inserts, direct mail and email as the top three ways by which they would like GSU to communicate with them.

Respondents were then asked about how that they would like to communicate with GSU, with most naming telephone (63%) and email (14%). Other comments included regular mail (7%), social media (4%), a link of the website (4%) and at the GSU office (4%), while 4% had no preference.

WEBSITE

Respondents were first asked if they had visited the Greater Sudbury Hydro website over the course of the last year of which 15% said that they had (24% in 2013). Website visitors were then asked follow up questions related to the information provided.

“How would you rate the quality of the information provided on the Greater Sudbury Hydro website?”



A total of 67% of website visitors rated the quality of the information provided as good or very good, a similar number as in 2013.

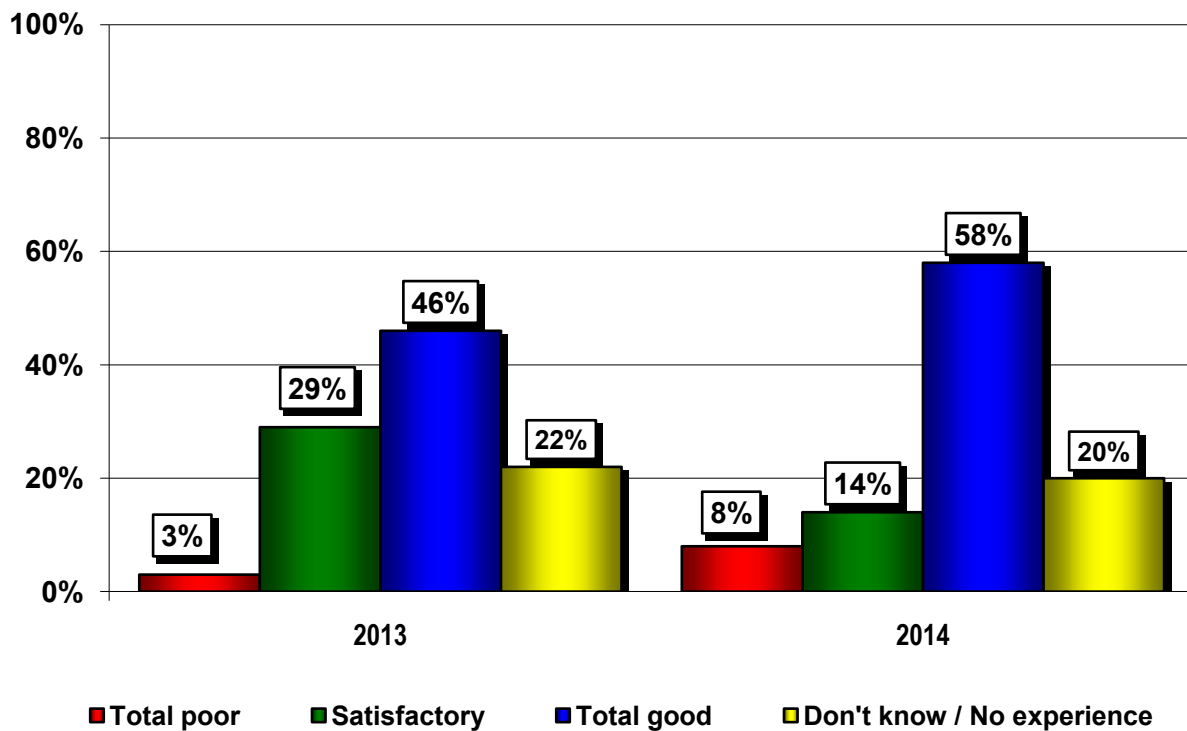
Website visitors were also asked about the information that they were looking for, with 53% naming account information, 27% information about conservation or saving energy and 20% rates and fees. A total of 60% did claim that they found the information that they were looking for (50% in 2013).

In addition, all respondents were asked if they would be interested in managing their account online of which more than four in ten or 44% said that they would (43% in 2013).

PRINT MATERIAL

Respondents then rated the print material provided by Greater Sudbury Hydro.

“Using a scale from one very poor to five very good, how would you rate the overall quality of each of the bill inserts and other printed material you have received from Greater Sudbury Hydro?”

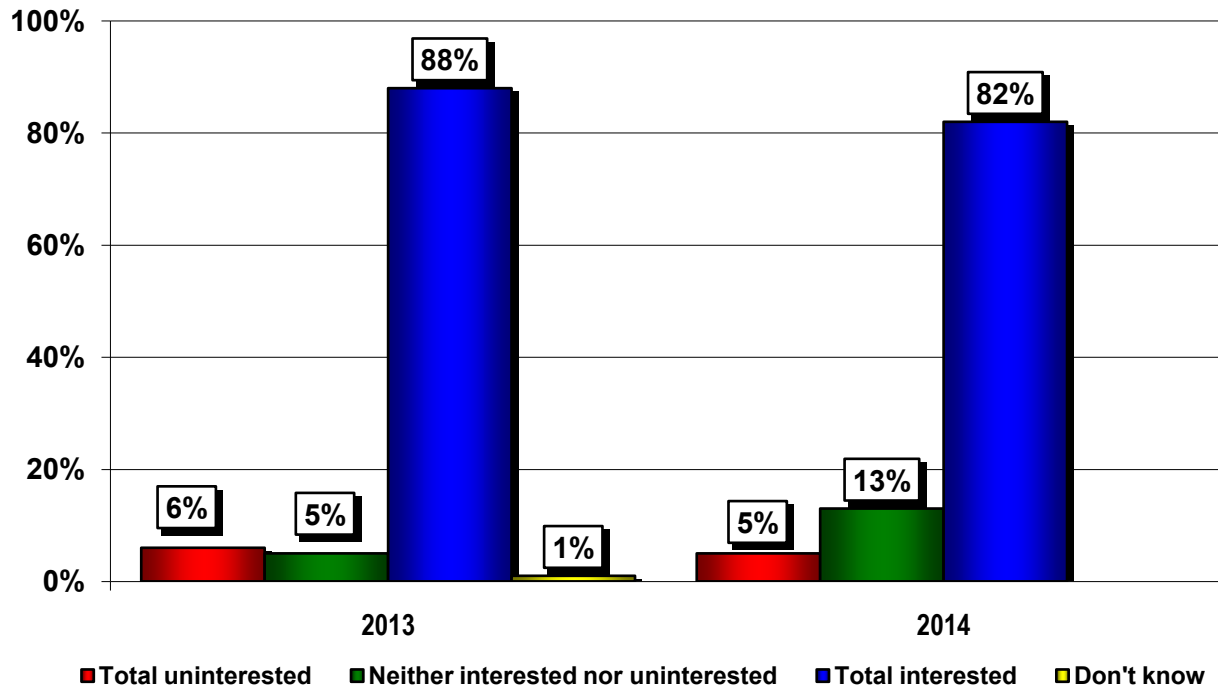


More businesses or 58% now have a positive opinion of the overall quality of bill inserts and printed material compared to the previous survey (+12%).

ENERGY EFFICIENCY

A question was then asked about consumer interest in information about energy efficiency and cost savings.

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

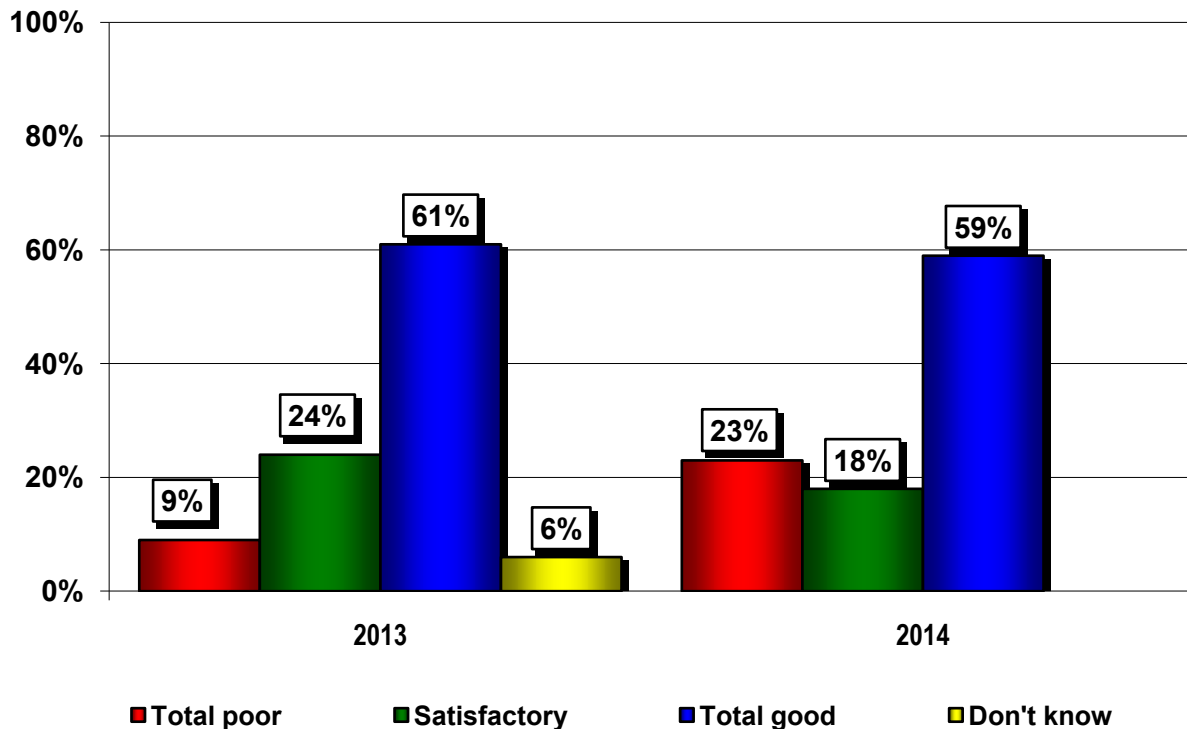


Interest remains high among businesses for having GSU provide them with information that can help them save money by being more energy efficient.

BILLING – EASE OF UNDERSTANDING

Respondents were questioned about their energy bill.

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



A total of 61% of business consumers continue to provide a good or very good score for the ease of understanding or reading their utility bill. There was a 14% drop in the total poor score and corresponding increasing in the satisfactory category.

IMPROVEMENT COMMENTS

In a final open ended question, business customers were asked what they felt that Greater Sudbury Hydro could do to provide better service.

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

<i>IMPROVEMENT COMMENTS</i>	<i>2014</i>
Don't know	54%
Lower rates	29%
Make bills easier to understand / more clearer	11%
Better hours of operation	3%
Do not raise the rates	2%
More information / notice about power outages	1%

While 54% did not know what could be done to improve service, among those with an opinion lower rates was most named by 29%, followed by making bills easier to understand (11%).