Appendix A – DSP Customer Engagement

Appendix A-1 – 2016 Customer Survey

Tillsonburg Hydro

UtilityPULSE

Electric Utility
Customer Satisfaction Survey

The purpose of this report is to profile the connection between Tillsonburg Hydro Inc. (Tillsonburg Hydro) and its customers.

The primary objective of the Electric Utility Customer Satisfaction Survey is to provide information that will support discussions about improving customer care at every level in your utility and in making investments in Capital and Operational expenditures.

The UtilityPULSE Report Card® and survey analysis contained in this report do not merely capture state of mind or perceptions about your customers' needs and wants - the information contained in this survey provides actionable and measurable feedback from your customers.

All comments and questions should be addressed to:

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Survey Observations & Insights

We don't know what we don't know – and that is a primary purpose for investing time and energy into various Customer engagement activities. Trust in institutions is eroding – the good news is 90% of Tillsonburg Hydro's customers agree that you are trusted and trustworthy -- customers want to know more about the companies, and their people, they are dealing with. Today's heroes, when customers have problems or issues are "everyday people" whose actions show that they understand and are doing everything in their power to solve the problem. We've said this to our clients many times: "where understanding stops, stress, irritation, anger and conflict begin".

Attributes strongly linked to Credibility & Trust			
	Tillsonburg Hydro	National	Ontario
Keeps its promises to customers and the community	87%	79%	80%
Customer-focused and treats customers as if they're valued	87%	74%	76%
Is a trusted and trustworthy company	90%	81%	81%

Base: total respondents with an opinion who agree the statement applies to their utility

We have seen a social shift in the customer base, wherein there is a high expectation that they will be involved in the decisions that affect them. 89% of 1,269 Residential customers, located throughout Ontario agree somewhat + agree strongly that their LDC should solicit feedback about customer satisfaction.

Customer engagement is not about making customers “happy” with the costs or the service that is being provided by their LDC. Nor is customer engagement about making the industry regulator “happy”. The purpose of feedback from customers is to assist decision-makers as they make decisions about investments (capital and maintenance) and operational/service quality improvements.

Regardless of what Tillsonburg Hydro needs to do, or their rationale for doing so, the reality is about 1 in 4 customers are not willing to pay anything for any capital item. While it would seem logical to make Capital expenditures, particularly as it relates to replacing aging equipment for reliability and to keep equipment safe and up-to-date, for a significant number of customers there would be resistance of any increase regardless of the rationale to do so. It is interesting to note, about 1 in 4 respondents were not willing to support any increase for any operational item.

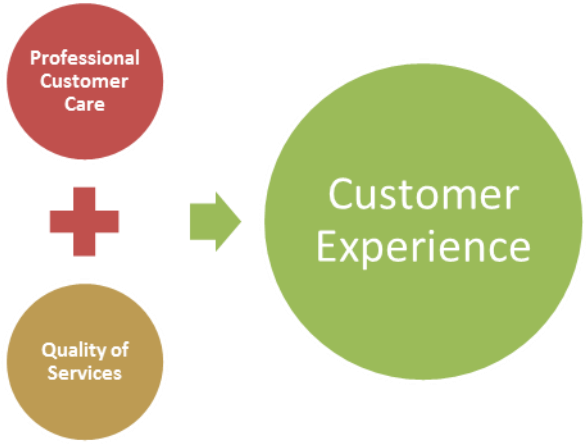
Customer engagement is not about getting agreement (though that would be nice), customer engagement is about ensuring there is an understanding of customer wants and needs; particularly when the possibility of an increase cost is involved.

Utility Customer Centric Engagement Index (CCEI)			
	Tillsonburg Hydro	**National**	**Ontario**
CCEI	84%	83%	81%

Base: total respondents

Engagement is how customers think, feel and act towards the organization. Ensuring that customers respond in a positive way requires that they are rationally satisfied with the services provided AND emotionally connected to your LDC and its brand.

The Customer Experience Performance rating (CEPr) score is an effectiveness rating and is affected by many dimensions of service. Every touch point with customers on the phone, website or in-person influences what customers think and feel about the organization. While an excellent transaction today creates a positive experience today, the perception created is, future transactions will be excellent too. Of course a negative transaction creates the perception, future transactions will be negative.



Customer Experience Performance rating (CEPr)			
	Tillsonburg Hydro	**National**	**Ontario**
CEPr: all respondents	88%	83%	82%

Base: total respondents

Providing great customer service is actually only one part of the equation for creating more satisfied and connected (loyal) customers. Customers have expectations which are becoming more diverse and complex with each passing year. The types of expectations that customers have include: Explicit

expectations i.e., constant availability of electricity; Implicit expectations i.e., safety when doing the work is a priority; Static performance expectations i.e., the billing will be done right; and, Interpersonal expectations ie., they will be dealt with in a courteous and professional manner.

Numbers at a Glance

	Tillsonburg Hydro 2016	National 2016	Ontario 2016
Customer Satisfaction: Initial	90%	89%	88%
Customer Satisfaction: Post	93%	88%	86%
Overall Satisfaction with most recent experience	66%	79%	69%
Problem Solved: YES	66%	81%	69%
Customer Experience Performance Rating (CEPr)	88%	83%	82%
Customer Centric Engagement Index (CCEI)	84%	83%	81%
Credibility & Trust Index	84%	83%	80%
UtilityPulse Report Card©	A	A	B+

Willingness to Pay

How much are customers willing to pay? Much has been written and reported in regards to the cost of electricity. A goal of customer engagement, in addition to understanding wants & needs, is to reduce the worry customers have about the reliability and future costs of electricity. What readers may not

know is that Tillsonburg Hydro has to focus on day-to day operations while it builds, re-builds, re-furbishes and prepares the organization for a changed future. In addition, LDCs need to think in terms of decades, not just today, this week, this month, or this quarter. They need to do so in a regulated environment that is a 5 year planning environment.

Respondents were asked about their willingness to pay more for 4 Capital items and 5 Operational items. The data tells us the amounts people are willing to pay are affected by things such as income and affinity levels. That is, higher income earners are willing to pay more. Customers who have a stronger connection with the LDC are willing to pay more when compared to customers who are "At Risk."

A higher percentage of respondents are willing to support an increase for items that directly affect them and/or items to which they have an emotional attachment. The reality is, personal circumstances affect a person's willingness to pay. This creates a broad range of viewpoints.

Respondents have a perception about the electricity industry as a whole. That image influences support for increases. We asked respondents*: "Are Customers served well by the electricity system in Ontario?"* 22% Agree strongly with the statement, 34% Agree somewhat, 12% Neither, 13% Disagree somewhat, 14% Disagree strongly and 5% had no opinion The range of views about the industry impacts the support levels for an increase. There is no statistical difference between the views of Tillsonburg respondents and those in the UtilityPULSE database.

Based on our work with LDCs in Ontario, if Tillsonburg Hydro tries to “sell” an increase in rates, it will be met with some cynicism and resistance. Explaining “how” decisions are made coupled with an explanation on “which” Capital and Operational expenditures are needed, will help people understand “why” there is an increase. People don’t want to pay more, though when a worthy case is made for an increase they can be accepting about the rationale to do so.

We’ve often been asked: “What does it take to be seen as having great customer service?” Our answer continues to be “have genuine empathy for customers.” If you and your fellow employees don’t have it, then your organization will not achieve the highest levels of customer engagement and affinity as may be possible. This requires Tillsonburg Hydro to ensure it is truly embracing the strategic intent of being “customer centric” AND it requires the establishment of a corporate culture which supports both customer and employee engagement.

We recommend having meaningful two-way dialogue with employees (and others) to leverage the results from your 2016 customer satisfaction survey derived from speaking with 415 Tillsonburg Hydro customers [July 11 – July 19, 2016]. After-all, people cannot care about things they don’t know about.

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Table of contents

Table of contents

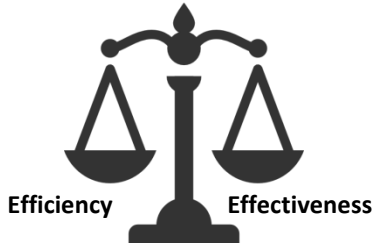
Satisfaction (pre & post)

In Ontario, the Ontario Energy Board (OEB) has made it clear Customer Satisfaction measurement will be part of an Electricity Distributor's reporting. Measuring satisfaction is the bedrock, or starting point, for the creation of loyal customers. One has to do the job as expected before there is an opportunity to emotionally connect in a positive way.

A focus on satisfaction prompts an organization to continue to evolve in ways that make sense to those who pay the bills. A focus on satisfaction is a focus on effectiveness in the delivery of service to the customer. Satisfied customers who trust their LDC may be more likely to seek advice i.e. energy efficiency methods, and may be more receptive to important messages i.e. safety, new capital projects, etc.

About ratings/measures:

- Satisfaction is not a program, it is an outcome.
- ***Efficiency*** *is about achieving objectives with the minimum amount of people, time, money and other resources.*
- ***Effectiveness*** *ratings are measures keeping the organization and its people more future focused than efficiency ratings*



Finding the right balance between efficiency and effectiveness measures is difficult.

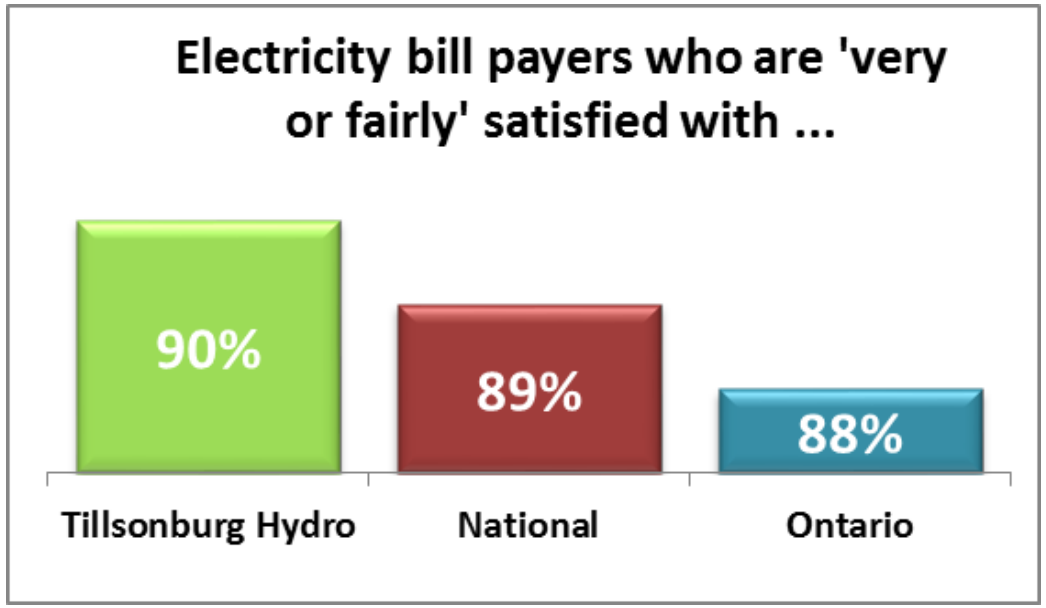
Efficiency ratings won't lead to satisfaction but they can lead to dissatisfaction. Taking 90 seconds to answer the phone will create an agitated customer who, for the most part starts off being dissatisfied with the service – before you've even had a chance to deal with or solve their problem. Answering the phone in 20 seconds but not solving the customer's problem is not going to ameliorate the customer's perception about the transaction.

Customer expectations of their electricity LDC have evolved past the "provide electricity reliably, safely and billed both accurately with fair pricing". They do expect their LDC to be ethical, forward-thinking, competent and trustworthy.

- **Satisfaction** happens when utility core services meet or exceed customer's needs, wants, or expectations.

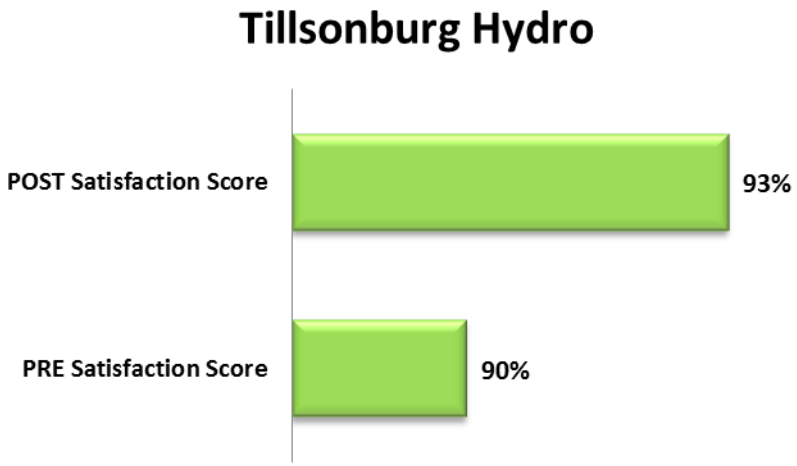
- **Loyalty** occurs when a customer makes an emotional connection with their electric utility on a diverse range of expectations beyond core services.

Satisfaction alone does not make a customer loyal; a willingness to commit and advocate for a company along with satisfaction identifies the three basic customer attitudes



which underpin loyalty profiles. While satisfaction is an important component of loyalty, the loyalty definition needs to incorporate more attitudinal and emotive components.

In the Simul/UtilityPULSE Customer Satisfaction survey, the overall satisfaction question is asked both at the beginning (PRE) and the end (POST). Asking the general satisfaction question at the start of the survey avoids bias and we obtain a spontaneous rating. This allows measurement of customers' overall impressions of the utility prior to prompting them to think of specific aspects of the relationship. After we have asked about specific aspects of the customer experience, we gain a more *considered* (or conditioned) response.



Base: total respondents

As with any enterprise, Tillsonburg Hydro has an obligation to satisfy its customers. But the rewards for satisfying customers go far beyond "obligation". Customers with high levels of satisfaction handle problem far better than customers with low satisfaction. For employees, serving customers who are very satisfied are more enjoyable interactions than with customers who are very dissatisfied. Satisfied and engaged employees who work in an organizational culture which promotes service excellence is key for completing the job both efficiently and effectively.

SATISFACTION SCORES – Electricity customers' satisfaction			
Top 2 Boxes: 'very + fairly satisfied'	**Tillsonburg Hydro**	**National**	**Ontario**
PRE: Initial Satisfaction Scores	90%	89%	88%
POST: End of Interview	93%	88%	86%

Base: total respondents

Organizations are not successful; it is the people who work in the organization that are successful. They will move it forward, stall it, or move it backwards. As UtilityPULSE consultants have learned by working with executives and managers, it is the employees' skills, quality of interpersonal relationships and willingness to work as a team that creates value for the organization and its customers.

SATISFACTION SCORES – Electricity customers' satisfaction			
Top 2 Boxes: 'very + fairly satisfied'	**Residential**	**Small Commercial**	**Large Commercial**
Satisfaction Scores	88%	97%	100%

Base: total respondents

SATISFACTION SCORES – Electricity customers' satisfaction [kwh usage]			
Top 2 Boxes: 'very + fairly satisfied'	**kWh Group 1**	**kWh Group 2**	**kWh Group 3**
Satisfaction Scores	95%	90%	83%

Base: total respondents

SATISFACTION SCORES – Electricity customers' satisfaction [Income]			
Top 2 Boxes: 'very + fairly satisfied'	**<$40K**	**$40 – 70K**	**$70K +**
Satisfaction Scores	88%	92%	84%

Base: total respondents

SATISFACTION SCORES – Electricity customers' satisfaction [Age]			
Top 2 Boxes: 'very + fairly satisfied'	**Age: 18-34**	**Age: 35-54**	**Age: 55 +**
Satisfaction Scores	80%	85%	90%

Base: total respondents

Electricity bill payers who are 'very or fairly' satisfied with…					
Top 2 Boxes: 'very + fairly satisfied'	**2016**	**2015**	**2014**	**2013**	**2012**
Tillsonburg Hydro	90%	-	-	-	-
National	89%	89%	89%	90%	88%
Ontario	88%	86%	83%	90%	86%

Base: total respondents / (-) not a participant of the survey year

Group 1 represents 25% of the customer base derived from segmenting the customer data file into the first quartile of kWh usage. Group 2 represents the middle 50% of the customer base; and Group 3 represents the top quartile of kWh customers

Customer Service

For the past 25 years or so, certainly during our 18 years as providers of the UtilityPULSE survey, companies and utilities struggle to find the right balance between cost-effective, technology-enabled approaches to customer service and person-to-person contact. In addition the utility's customer base has an uneven level of interest and skill in using technology-enabling processes. While personal approaches have advantages for many people, such as an ability to respond in a dynamic way to a customer inquiry, they do require much more training, and cost more.

While many things have changed over the years, the keys to good customer service have not. Customers want someone to understand their problem and then respond in a in a professional, knowledgeable, and timely manner. It is the customer, not the LDC, who determines whether customer service met expectations..

Respondents, were asked about six aspects of their most recent experience with a representative from Tillsonburg Hydro.

- Information – quality of information provided
- Staff attitude – level of courtesy
- Professionalism – the knowledge of staff
- Delivery – helpfulness of staff
- Timeliness – the length of time it took to get what they needed
- Accessibility – how easy it was to contact someone

1. *Their problem solved quickly*
2. *To have personal interaction with a customer care representative*
3. *To speak with a knowledgeable and courteous customer care representative*

Base: total respondents who contacted the utility

Satisfaction with Customer Service			
Top 2 Boxes: 'very + fairly satisfied'	**Tillsonburg Hydro**	**National**	**Ontario**
The time it took to contact someone	83%	76%	70%
The time it took someone to deal with your problem	71%	74%	66%
The helpfulness of the staff who dealt with you	83%	73%	70%
The knowledge of the staff who dealt with you	83%	73%	70%
The level of courtesy of the staff who dealt with you	86%	72%	80%
The quality of information provided by the staff who dealt with you	71%	71%	69%

Base: total respondents who contacted the utility

Overall satisfaction with most recent experience			
	Tillsonburg Hydro	National	Ontario
Top 2 Boxes: 'very + fairly satisfied'	66%	79%	69%

Base: total respondents who contacted the utility

Every interaction with a customer is an opportunity to generate higher levels of affinity. It is fool-hardy to view the ratings shown above as ratings for the "call-centre" because every person in Tillsonburg Hydro interacts with a customer or supports those who do have person-to-person contact with a customer. Most of the items listed are intangible which means it is the customer who determines the measurement to be used. What might be a high level of courtesy to one customer is not necessarily a high level of courtesy from another. The inability to put hard measures on an important customer expectation frustrates many in the electric utility business – a business very used to hard measures of performance. Everyone in the organization has to learn it is the intangibles not the tangibles which create satisfied customers. While Customer Service scores are above the Ontario benchmark, the satisfaction with the most recent experience is not. We know that the habit of summarizing an interaction e.g., call with a customer improves customer scoring.

Customer Focus – Service Quality

Current measures in the LDC scorecard are: New Residential Services Connected on Time; Scheduled Appointments Met on Time; and, Telephone Calls Answered on Time. These are good examples of efficiency measures as all are time based. Showing up on time may not create satisfaction, not showing up on time will cause dissatisfaction.

UtilityPULSE findings from working with many LDCs over the past few years indicate it is much harder to get great ratings from customers who may not know much about their utility. Despite this, service quality ratings for Tillsonburg Hydro are very good and above the Ontario benchmark.

Current measures in the LDC scorecard are: New Residential Services Connected on Time; Scheduled Appointments Met on Time; and, Telephone Calls Answered on Time. These are good examples of efficiency measures as all are time based. Showing up on time may not create satisfaction, not showing up on time will cause dissatisfaction.

Other dimensions of Service Quality which customers value include:

Customer Service Quality			
Top 2 boxes, 'strongly + somewhat agree'	**Tillsonburg Hydro**	**National**	**Ontario**
Deals professionally with customers' problems	90%	82%	82%
Customer-focused and treats customers as if they're valued	87%	74%	76%
Is a company that is 'easy to do business with'	90%	81%	81%

Base: total respondents with an opinion

When time-pressed customers get their questions and issues dealt with professionally ***AND*** they are treated as important people the reward is inevitably higher levels of satisfied customers.

Bill Payers' Problems and Problem Resolution

Outages and billing problems, we call them the "Killer B's", the two issues that are most likely to cause grief to utility customers.

At one time, if the power went off for a few minutes, it was considered annoying and inconvenient. However, with the onset of computers and smart appliances in homes and businesses, a power outage is now unbearable. Customers have little tolerance for an interruption in their flow of electricity.

1 in 3 (33%) Tillsonburg Hydro respondents claimed they experienced a problem (outage, billing or other) in the past 12 months.

26% of those respondents with a problem did contact Tillsonburg Hydro to deal with the problem.

Respondents who said they contacted the utility were also asked "Do you consider the problem solved or not solved?" 66% of your LDC's respondents said the problem was solved. The Ontario benchmark rating is 69%. It is important to note with a small data sample, there are greater swings in scores.

Problems aggravate customers. It could be said, some problems can actually anger customers. As a minimum, a problem is an inconvenience to the customer – and they want it solved/resolved.

First Contact Resolution (FCR), as it is conventionally understood, remains an important metric for LDC performance. When a call or email is routed to a Tillsonburg Hydro representative, it's important that the representative is able to resolve the issue right then and there. Otherwise, the cost for handling the issue goes up—and the quality of the customer's experience starts going down.

When the problem is solved with the first interaction overall customer satisfaction improves. That higher level of satisfaction delivers more than just incremental reductions in call center costs. It actually enables your company to build a stronger brand, and bolster customer affinity levels. When customer satisfaction and loyalty improve the utility benefits.

Percentage of Respondents who contacted their utility and had their problem solved in the last 12 months			
	Tillsonburg Hydro	**National**	**Ontario**
Yes	66%	81%	69%
No	31%	17%	27%

Base: total respondents with a problem

FCR rates are an important metric for improving call center performance. The first step in improving "FCR" is to survey your front-line customer touch-points and understand what kind of assistance and information customers are seeking in these situations. Once you clearly understand what kinds of interactions are taking place at each of your initial customer touch-points, you can then take steps to improve those interactions.

Interestingly when customers do have a problem, contact their LDC, and get the problem solved their satisfaction ratings are very similar to the overall level of satisfaction that exists.

SATISFACTION SCORES – Electricity customers' satisfaction			
	Overall	**Problems Solved**	**Problems Not Solved**
Top 2 Boxes: 'very + fairly satisfied'	89%	88%	60%
Bottom 2 Boxes: 'fairly + very dissatisfied'	7%	8%	37%

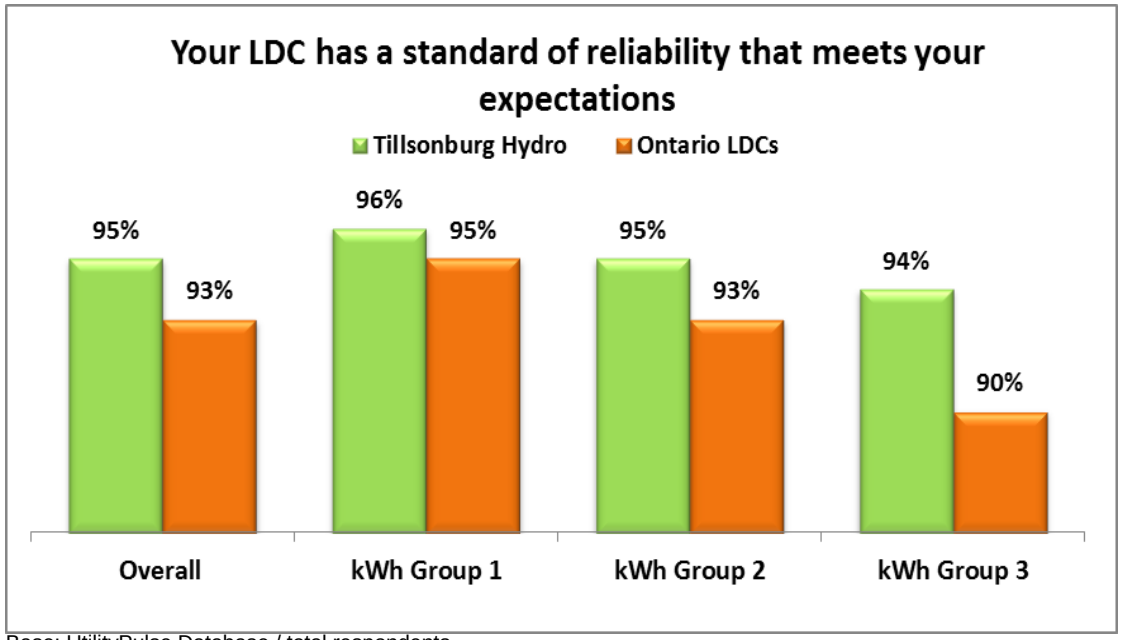
Base: total respondents from the UtilityPulse database (12 month period ending July 2016)

Outage Management

Customers have increased their expectations as it relates to getting information about outages. What makes the dissemination of information challenging for the LDC is the need to provide the information via multiple media channels and in a timely manner whilst trying to get the power restored. The perception of competency and value of the LDC are certainly linked to the frequency and duration of power outages.

Recognizing the importance of this topic to customers, a question about LDC reliability standards was asked in the survey.

Scores for Tillsonburg Hydro indicate the vast majority of customers feel the utility is consistent in meeting their expectations.



Base: UtilityPulse Database / total respondents

Has a standard of reliability that meets expectations…			
Tillsonburg Hydro	**Residential**	**Small Commercial**	**Large Commercial**
Top 2 Boxes: 'agree strongly + agree somewhat'	95%	95%	93%

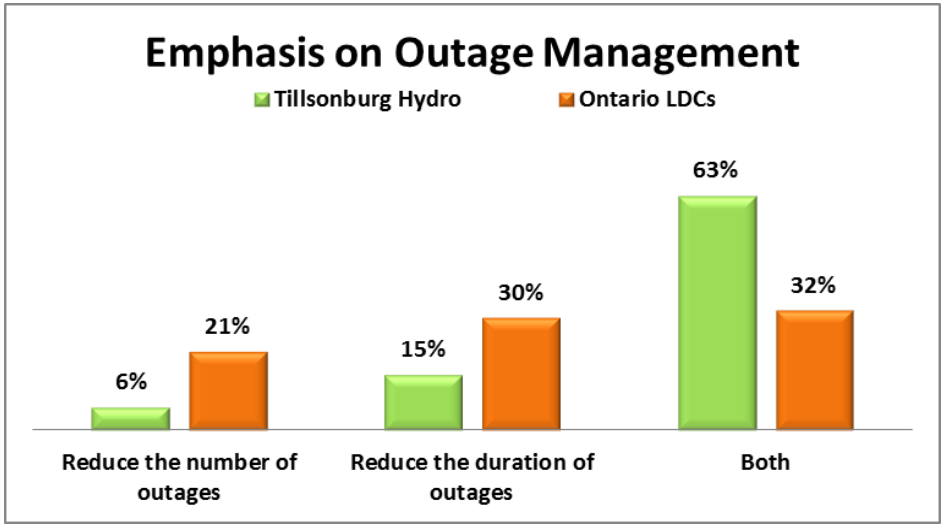
Base: total respondents

Has a standard of reliability that meets expectations…			
Tillsonburg Hydro	**kWh Group 1**	**kWh Group 2**	**kWh Group 3**
Top 2 Boxes: 'agree strongly + agree somewhat'	96%	95%	94%

Base: total respondents / Group 1 represents 25% of the customer base derived from segmenting the customer data file into the first quartile of kWh usage. Group 2 represents the middle 50% of the customer base; and Group 3 represents the top quartile of kWh customers

Knowing, and communicating, the reason(s) for the outage whether they are planned or unplanned would be welcomed information.

If the utility were to improve reliability should they put more emphasis on reducing the number of unplanned outages or reducing the duration of the unplanned outage? Or both which requires an increase in costs and potentially rates.



Base: UtilityPulse Database / total respondents

Emphasis on Outage Management			
Tillsonburg Hydro	**Residential**	**Small Commercial**	**Large Commercial**
Reduce the number of outages	5%	7%	20%
Reduce the duration of outages	14%	20%	7%
Both	63%	65%	60%
Don't know	17%	8%	13%

Base: total respondents

Quantifiable data from the telephone interviews show duration of outages presents more of a concern than the number of outages across different customer groupings and about 6in 10 customers want both issues addressed.

Emphasis on Outage Management			
Tillsonburg Hydro	**<$40K**	**$40 – 70K**	**$70K +**
Reduce the number of outages	4%	8%	2%
Reduce the duration of outages	9%	16%	19%
Both	60%	71%	63%
Don't know	26%	6%	16%

Base: total respondents

Outages: Frequency and Duration

20% of respondents believe there should be no outages in a year; somewhat unrealistic as nothing in business or life is 100% guaranteed.

How many outages are acceptable in a year?				
	Total	Residential	Small Commercial	Large Commercial
None	20%	17%	23%	60%
One	11%	12%	7%	0%
Two	24%	24%	25%	27%
Three	16%	16%	18%	0%
Four	6%	6%	2%	7%
Five or more	13%	12%	18%	7%
Don't Know	11%	12%	7%	0%

Base: total respondents

What is a reasonable amount of time for a typical outage?	
	Tillsonburg Hydro
15 minutes or less	10%
16 to 30 minutes	14%
31 to 60 minutes	19%
1 to less than 3 hours	39%
3 to less than 6 hours	7%
6 to 12 hours	1%
More than 12 hours	1%
Don't Know	7%

Base: total respondents

… believe 1 to less than 3 hours is a reasonable amount of time for a typical outage.

Communication during an outage

Which communication channel do customers prefer to use? The UtilityPULSE database information from over 10,000 residential and small commercial customer interviews, shows the telephone is still the most used and preferred method to contact the LDC to communicate with customer care representatives.

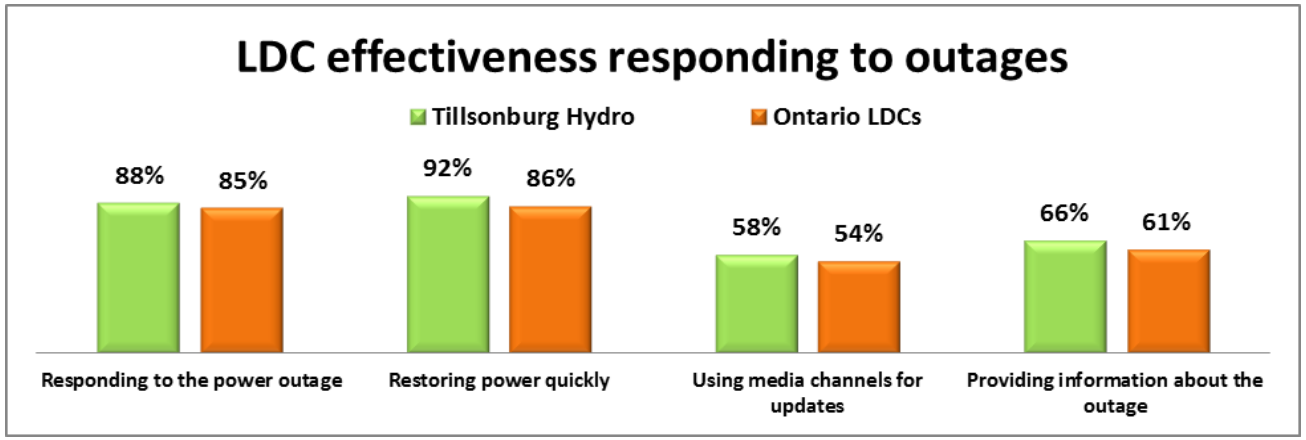
While the telephone is still the communication channel most would prefer to use to communicate with or to be communicated to, customers do have an expectation for the LDC to use varied methods to contact them. Communication channels other than the telephone received higher preference scores when asked about the utility contacting the customer versus the customer's use of such channels to contact the utility. This indicates the onus is on the utility to find a way to contact a customer when necessary and it should use various means/channels to ensure the message is communicated. Proactive communication channels which include recorded calls, emails and SMS (text messaging) are increasingly being used by utilities to reach customers affected by outages.

Being seen as effective during an outage situation from the point of view of a customer requires:

- timely information on outages is provided
- utilities understand that even a short outage in duration is impactful
- in large scale events, utilities should proactively provide tips on how to prepare for extended outages
- being kept informed about what is going on during an outage makes customers feel valued.

LDC effectiveness responding to outages: Top 2 Boxes: "Very + Somewhat effective"		
	Ontario LDCs	Tillsonburg Hydro
Responding to the power outage	85%	88%
Restoring power quickly	86%	92%
Using media channels for updates	54%	58%
Providing information about the outage	61%	66%

Base: UtilityPulse Database / total respondents



Base: UtilityPulse Database / total respondents

The types of information customers require during an outage include:

- *When will their power be restored?*
- *What areas are affected?*
- *How many customers are impacted?*
- *Have work crews been dispatched to the affected area and is the utility working to restore power?*
- *What was the cause of the power outage?*
- *What can customers do to cope during the outage?*

LDC effectiveness responding to outages: Top 2 Boxes: "Very + Somewhat effective"			
Tillsonburg Hydro	**Residential**	**Small Commercial**	**Large Commercial**
Responding to the power outage	88%	85%	87%
Restoring power quickly	92%	93%	93%
Using media channels for updates	60%	45%	53%
Providing information about the outage	66%	58%	73%

Base: total respondents

Customer Experience Performance rating (CEPr)

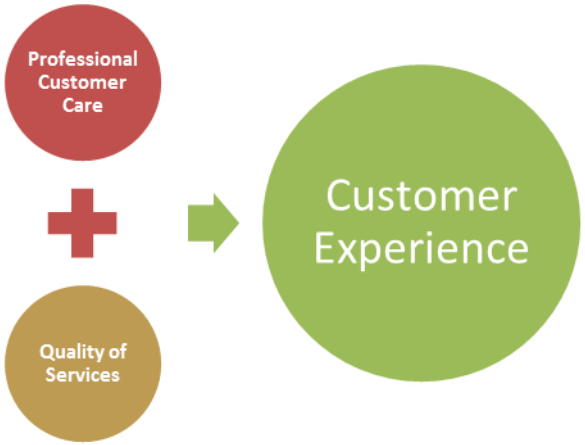
The CEPr score is an effectiveness rating and is affected by many dimensions of service. Every touch point with customers on the phone, website or in-person influences what customers think and feel about the organization. While an excellent transaction today creates a positive experience today, the perception created is, future transactions will be excellent too. Of course a negative transaction creates the perception, future transactions will be negative.

When the customer experience is strong, the opportunity to build loyalty is great. When the experience is a negative one, customers often conclude the organization doesn't care. When a customer believes the organization doesn't care, outrage and anger are a very real possibility.

Understanding your customer's expectations for service is the first step in providing an amazing customer experience. It is essential customer care call centers develop a comprehensive understanding of what

At the heart of the CEPr are 4 central questions:

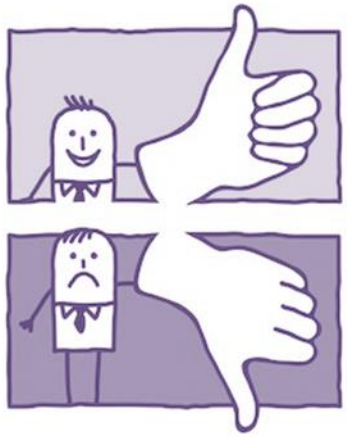
1. *Are interactions with the organization professional and productive?*
2. *Is the organization 'easy to deal with'?*
3. *Does the organization effectively meet your needs?*
4. *Does the organization provide high quality services?*



customers expect from them, whether or not their needs are being met and how they can improve their service to meet their expectations.

Some of the factors which contribute to the overall customer experience:

- Delivering accessible and consistent customer service (multi-channel)
- Understanding customer expectations
- Maintaining timely resolution timelines
- Providing effective communication(s) according to customer needs
- Demonstrating responsiveness
- Speeding up problem resolution
- Conducting problem analysis to prevent recurring issues
- Easy to do business with
- Seeking customer feedback and following through on recommendations



Customer Experience Performance rating (CEPr)			
	Tillsonburg Hydro	**National**	**Ontario**
CEPr: all respondents	88%	83%	82%

Base: total respondents

The CEPr for Tillsonburg Hydro is 88%. This rating would suggest a very large majority of customers have a belief they will have a good to excellent experience dealing with Tillsonburg Hydro professionals.

Customer Centric Engagement Index (CCEI)

Customer engagement is often thought of as a series of activities involving the customer such as conducting a survey, holding town hall type meetings, focus groups, etc. One could call these types of activities as the behaviour side of engagement. However there is an emotional side to engagement.

This survey also provides you with an emotional look at engagement. The UtilityPULSE CCEI is a gauge of the amount of goodwill that has been generated. High numbers in CCEI suggest there is a high level of goodwill amongst your customers – this is important for two reasons. First when something goes awry for the utility, goodwill helps the utility to be resilient. Second, goodwill encourages active participation in requests to participate in engagement activities or program offerings from the utility.

The CCEI is a metric designed to get a more in-depth look at the attachment a customer has with your LDC and its brand. High levels of customer engagement (emotional) correlate strongly to high levels of Secure and Favourable customer numbers.

Engagement is how customers think, feel and act towards the organization. As such, ensuring customers respond in a positive way requires that they are rationally satisfied with the services provided AND emotionally connected to your LDC and its brand. The more frequently and consistently an organization's products and services can connect with a customer, especially on an emotional level, the stronger and deeper the customer becomes engaged with the organization.

UtilityPULSE has identified the six key dimensions of what defines customer engagement. They are: empowered, valued, connected, inspired, future oriented and performance oriented.

UtilityPulse Customer Centric Engagement Index (CCEI)			
	Tillsonburg Hydro	**National**	**Ontario**
CCEI	84%	83%	81%

Base: total respondents

Customer centric engagement is a measure of "goodwill" towards the utility. Customers who are less engaged, as measured by the CCEI are more likely to let costs and/or price impact their perceptions of their LDC. Customers who are highly engaged are more inclined to look past costs and money issues and use a rational approach to make values-based decisions. Highly engaged customers have a stronger emotional connection to your utility. It's this emotional connection that will drive commitment, loyalty and advocacy.

UtilityPULSE Report Card®

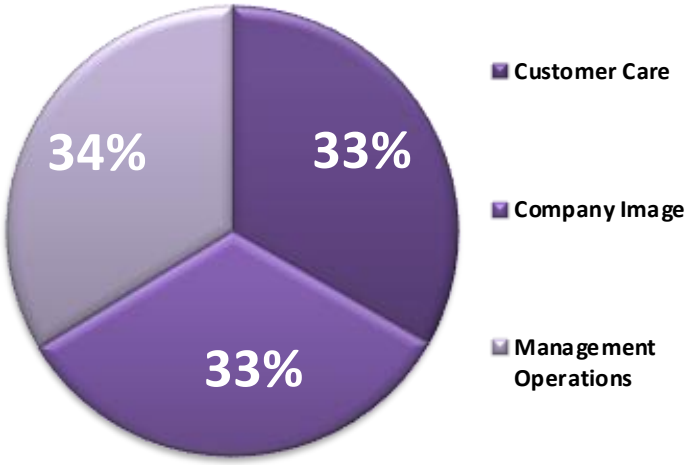
Simul's UtilityPULSE Report Card® is based on tens of thousands of customer interviews gathered over seventeen years. The purpose of the UtilityPULSE Report Card® is to provide electric utilities with a snapshot of performance – on the things customers deem to be important. Research has identified over 20 attributes, sorted into six topic categories (we call these drivers), that customers have used to describe their utility when they have been satisfied or very satisfied with their utility. These attributes form the nucleus, or base, from which "scores" are assigned. Customer satisfaction and loyalty also play a major role in the calculations.

There are two main dimensions of the UtilityPULSE Report Card® the first is customer psyche and the other is customer perceptions about how the utility executes its business.

The Psyche of Customers

Every utility has virtually the same responsibility – provide safe and reliable electricity – yet not all customers are the same. The following chart shows the weight or significance of each category to the customer when forming their overall impression of the utility. Three major themes, each with two major categories make up the UtilityPULSE Report Card®. In effect the Report Card provides feedback about your customers' perception on the importance of each category and driver – as it relates to the benchmark.

UtilityPULSE Report Card® for Tillsonburg Hydro



The UtilityPULSE Report Card is a zero sum game. As customer interest/concern in one area goes up, the others go down.

Base: total respondents

The UtilityPULSE Report Card® also provides customer perceptions about how your utility executes or performs its responsibilities. This is different, very different, from what a customer might say about a major concern or worry they have about electricity. As our survey has shown since its inception the primary suggestion for improvement is “reduce prices”, which is also a major concern which your customers have about municipal taxes, gas for the vehicle, and other utilities.

Readers of this report should note, the categories and drivers are interdependent. Which means, for example, failure to provide high levels of power quality and reliability will have a negative impact on customer perceptions as it relates to customer service. Customer care, when it doesn’t meet customer expectations has a negative impact on Company Image, etc.

Defining the categories and major drivers:

Category: Customer Care

Drivers: Price and Value; Customer Service

Just because everyone likes good customer care, that in and by itself, is not a reason to provide it – though it may be important to do so. In highly competitive industries good customer service may be a differentiating factor. The case for electric utilities is simple, high levels of customer care result in less work (hence cost) of responding to customer inquiries and higher levels of acceptance of the utility's actions.

Price and Value:

Customers have to purchase electricity because life and lifestyle depend on it. This driver measures customer perceptions as to whether the total costs of electricity represent good value and whether the utility is seen as working in the best interests of its customers as it relates to keeping costs affordable.

Customer Service:

Customers do have needs and every now and again have to interface with their utility. How the utility handles various customers' requests and concerns is what this driver is all about. Promptly answering inquiries, providing sound information, keeping customers informed and doing so in a professional manner are the major components of this driver.

Category: Company Image

Drivers: Company Leadership; Corporate Stewardship

Utilities have an image even if they do not undertake any activities to try to build it. A company's image is both a simple and complex concept. It is simple because companies do create images that are easily described and recognized by their target customers. It is complex because it takes many discrete elements to create an image which includes, but is not limited to: advertising, marketing communications, publicity, service offering and pricing.

An electric utility trying to manage its image has one more challenge to deal with, and is the electric industry itself. There are so many players, residential customers (in particular) don't know who does what or who is responsible for what. So when there are political or regulatory announcements, the local utility is often swept up into the collective reaction of the population.

Company Leadership

This driver is comprised of customer perceptions as it relates to industry leadership, keeping promises and being a respected company in the community.

Corporate Stewardship

Customers rely on electricity and want to know their utility is both a trusted and credible organization and that is well managed, is accountable, is socially responsible and has its financial house in order.

Category: Management Operations

Drivers: Operational Effectiveness; Power Quality and Reliability

Electrical power is the primary product which utilities provide their customers and, they have very high expectations the power will be there when they need it. Customers have little tolerance for outages. The reality is, every utility has to get this part right…no excuses. It is the utility's core business. This category and its drivers are clearly the most important for fulfilling the rational needs of a utility's customers.

Operational Effectiveness

This driver measures customers' perceptions as they relate to ensuring their utility runs smoothly. Attributes such as: accurate billing and meter reading, completing service work in a professional and timely manner and maintaining equipment in good repair are deemed as important to customers.

Power Quality and Reliability

Power outages are a fact of life – and, customers know it. They expect their utility to provide consistent, reliable electricity, handle outages and restore power quickly and make using electricity safely an important priority.

Tillsonburg Hydro's UtilityPULSE Report Card®

Performance

	CATEGORY	Tillsonburg Hydro	National	Ontario
1	**Customer Care**	**B+**	**B+**	**B**
	Price and Value	B+	B+	B
	Customer Service	A	B+	B+
2	**Company Image**	**A**	**A**	**B+**
	Company Leadership	A	B+	B+
	Corporate Stewardship	A	A	A
3	**Management Operations**	**A+**	**A**	**A**
	Operational Effectiveness	A+	A	A
	Power Quality and Reliability	A+	A	A
	OVERALL	**A**	**A**	**B+**

Base: total respondents

As the UtilityPULSE Report Card® shows, the total customer experience with an electric utility is defined as more than “keeping the lights on”. Customers deal with your utility every day for a variety of reasons, most likely because they need someone to help them solve a problem, answer a question or take their order for service. All your employees, from customer service representatives to linemen, leave a lasting impression on the customers they interact with. In effect there are many moments of truth. Moments of truth are every customer touch point a utility has with their customers. Therefore, managing these moments of truth creates higher levels of Secure customers while reducing the number of At Risk customers that exist.

It's the small things done consistently that matter: Things like greeting every customer, whether on the phone or in person, in a friendly and helpful manner. Things like listening to the customer's needs, providing solutions to their problems and showing appreciation to the customer for their business.

Utilities now recognize customer communications as a valuable aspect of their business. The better a utility communicates with customers in a manner that speaks to them, the more satisfied they are with their overall service. “Sending out information” is not the same as having a “conversation” with a customer. We believe it is increasingly important to channel your communications to the various customer segments which exist.

Obviously employees – in every area – play a critical role in customer service success. Consequently how they feel about their job responsibilities and role in the company will be communicated indirectly through the level of service which they actually provide customers with whom they interact. The reality is engaged employees are the key to excellent customer care.

Our survey work with employees shows there are many elements of an organizational culture to support the people model needed to achieve high levels of engagement.

Our research has identified 6 main drivers which promote and support people giving their best:

- **Empowered**
- **Valued**
- **Connected**
- **Inspired**
- **Growing**
- **Performance oriented**

There are 12 key processes from “attracting employees” to “saying goodbye to employees” are part of your people model to get the best performance from every employee.

We believe taking the time to understand the difference between employee satisfaction and organizational culture is worthwhile from a resourcing perspective and from a people development perspective. Every organization has a culture – we believe it is a leadership imperative to install and maintain a culture that ensures you will attain the achievements and successes of your utility’s many investments in people, technology and equipment. It is true, organization culture affects everyone and everyone affects organization culture.

The Loyalty Factor

If a customer is satisfied, it doesn't necessarily mean he or she is loyal. Satisfaction is about fulfilling promises/expectations; loyalty goes way beyond that by creating exceptional experiences and long-lasting relationships. There is a reason why marketing campaigns strive to build brand loyalty, not brand satisfaction. Measuring customer loyalty in an industry where many customers don't have a choice of providers doesn't make sense. Or does it?

The answer depends on how you define "customer loyalty."

Private industry often equates customer loyalty with basic customer retention. If a customer continues to do business with a company, the customer is, by definition, considered to be loyal. If this definition were applied to many companies in the utility industry, all customers would automatically be considered loyal. As such, measuring customer loyalty would appear to be unnecessary.

Natural monopolies (like LDCs) are not really different in what they should measure except that trying to determine which customers are "loyal" or "at risk" is not about their future behaviour but more about their "attitudinal" loyalty (are they advocates?).

Whether a customer is loyal and/or satisfied will be determined by an alignment of the emotion, experience and expectation of both the customer and the LDC.

Perhaps a better or more relevant way for utilities to approach the definition of customer loyalty is to further expand how they think about loyalty. Consider the following definition: Customer loyalty is an emotional disposition on the part of the customer that affects the way(s) in which the customer (consistently) interacts, responds or reacts towards the company – its products & services and its brand.

So what does it mean to respond favourably to a company? At a basic level, this can mean choosing to remain a customer. As previously mentioned however, this is essentially a non-issue for many utility companies. It then becomes necessary to think beyond just customer retention. One needs to consider other ways in which customers can respond favourably toward a company.

Other favourable responses or behaviours can be classified into one of three categories that reflect the concept of customer loyalty:

- Participation
- Compliance or Influence
- Advocacy

Some Tips to build loyalty:

- ✓ **Solve problems quickly**
- ✓ **Treat customers right**
- ✓ **Listen to complaints**
- ✓ **Be personal; create a great experience**
- ✓ **Friendly customer service**
- ✓ **Accessible information or help**
- ✓ **Good reputation**
- ✓ **Demonstrate you care**

Specific examples of potential participatory behaviour in the electric utility industry include:

- Signing up for programs that help the customer reduce or manage their energy consumption
- Using the utility as a consultant when selecting energy products and services from a third party
- Participating in pilot programs or research studies.

Specific examples of potential compliance or influence behaviours utility customers might exhibit include:

- Seeking the utility's advice or expertise on an energy-related issue
- Voluntarily cutting back on electricity usage if the utility advised the customer to do so
- Accepting the utility's energy advice or referrals to energy contractors or equipment
- Being influenced by the utility's opinion regarding energy- management advice, equipment, or technologies
- Providing personal information which enables the utility to better serve the customer
- Paying bills online.

Creating customer advocates can be especially important for a company in a regulated industry. In the absence of customer advocates, or worse, in a situation where customers speak unfavourably about a company or actively work to support issues that are counter to those the company supports, companies can suffer a variety of negative consequences like increased business costs, lawsuits, fines and construction delays. For an electric utility, specific examples of potential advocacy behaviour include:

- Supporting the utility's positions or actions on energy-related public issues, including the environment
- Supporting the utility's position on the location and construction of facilities
- Providing testimonials about positive experiences with the utility.

In sum, loyal behaviour in the utility industry may not be as evident as it is in a more competitive environment. Measuring customer loyalty in a generally non-competitive industry requires one to think about loyalty in non-

traditional ways. Customer loyalty is an intangible asset which has positive consequences or outcomes associated with it no matter what the industry. Properly measuring loyalty among utility customers requires thoughtful probing to thoroughly identify the range of participation, compliance, and advocacy behaviours which will ultimately benefit the company in meaningful ways, and foster happier and more loyal customers.

The UtilityPULSE Customer Loyalty Performance Score segments customers into four groups: **Secure** – the most loyal - **Still Favorable**, **Indifferent**, and **At risk**.

Secure customers are "very satisfied" overall with their local electricity utility. They have a very high emotional connection with their utility and definitely would recommend their local utility.

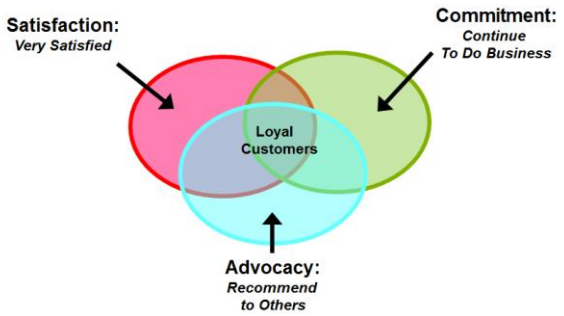
Still favorable customers are "very satisfied" overall, "definitely" or "probably" would recommend their local utility and not switch if they could.

Indifferent customers are less satisfied overall than secure and still-favorable customers and less inclined to recommend their local utility or say they would not switch.

At risk customers, who are "very dissatisfied" with their electricity utility, "definitely" would switch and "definitely" would not recommend it.

Loyalty is driven primarily by a company's interaction with its customers and how well it delivers on their wants and needs.

Customer Loyalty Model

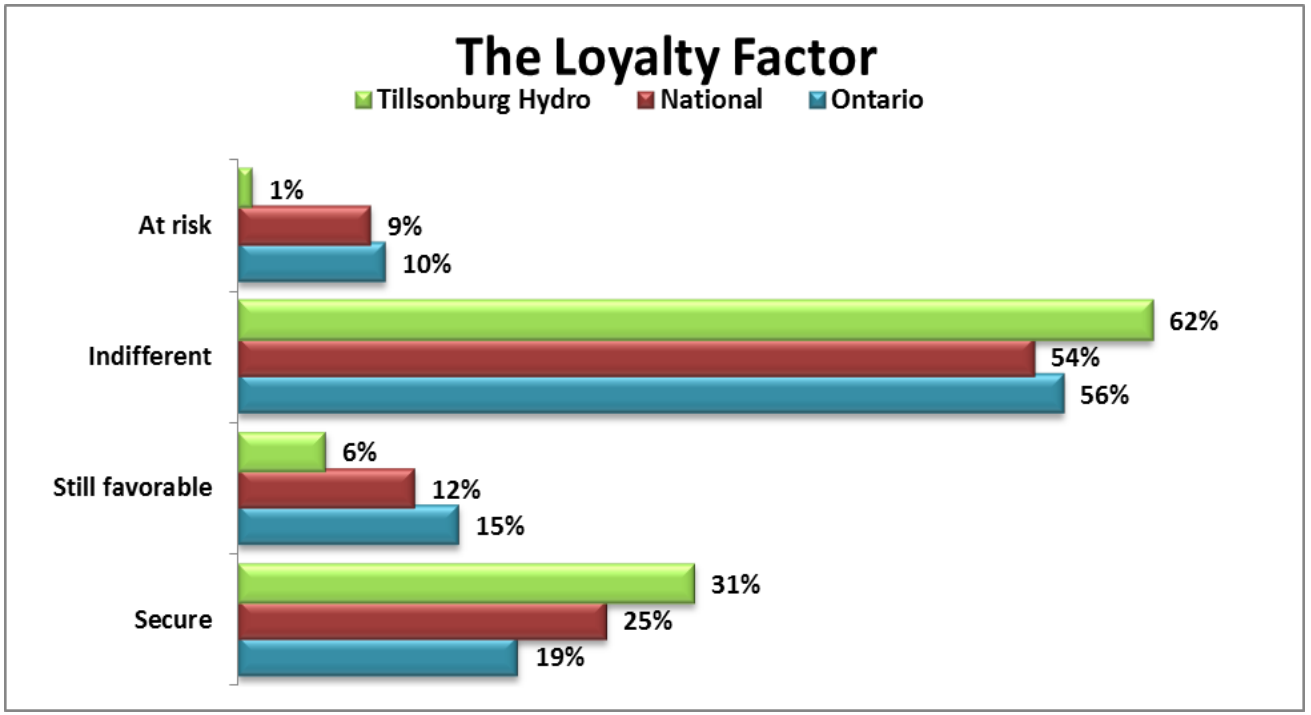


Loyalty is based on likelihood to:

- ***Satisfaction: overall satisfaction***
- ***Commitment: continue as a customer***
- ***Advocacy: willingness to recommend***

Customer Loyalty Groups				
	Secure	**Favorable**	**Indifferent**	**At Risk**
Tillsonburg Hydro				
2016	31%	6%	62%	1%

Base: total respondents

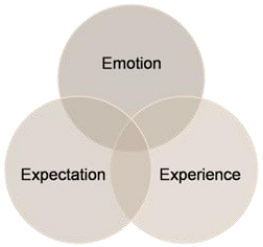


Base: total respondents

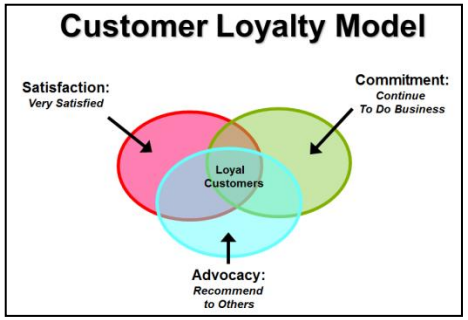
Customer Loyalty Groups				
	Secure	**Favorable**	**Indifferent**	**At Risk**
Ontario				
2016	19%	15%	56%	10%
2015	17%	11%	61%	11%
2014	17%	10%	57%	17%
2013	24%	15%	51%	11%
2012	20%	13%	53%	14%
National				
2016	25%	12%	54%	9%
2015	18%	11%	61%	10%
2014	20%	11%	56%	13%
2013	26%	17%	47%	10%
2012	30%	13%	46%	11%

Base: total respondents

Whether a customer is loyal and/or satisfied will be determined by an alignment of the emotion, experience and expectation of both the customer and the LDC.



Customer commitment



Customer loyalty is a term that can be used to embrace a range of customer attitudes and behaviours. One of the metrics used to gauge loyalty is the measure of **retention,** or intention to buy again; this loyalty attitude is termed **commitment.**

Customer commitment to the local electricity supplier is a very important driver of customer loyalty in the electricity service industry. In a similar way to trust, commitment is considered an important ingredient in successful relationships. In simpler terms, commitment refers to the motivation to continue to do business with and maintain a relationship with a business partner i.e. the local utility.

For electric utilities, this measurement is about identifying the number of customers who feel that they “want to” vs “have to” do business with you. Potential benefits of commitment may include word of mouth communications - an important aspect of attitudinal loyalty. Committed customers have been known to demonstrate a number of beneficial behaviours, for example committed customers tend to:

- Come to you. One of the key benefits of establishing a good level of customer loyalty is that customers will come to you when they need a product or service.

- Validate information received from 3rd parties with information and expertise that you have.
- Try new products/initiatives.
- Perhaps they will even trust you when recommendations are made.
- Be more price tolerant.
- More receptivity of utility viewpoints on various issues.
- More tolerance of errors or issues that inevitably take a swipe at the utility.
- Stronger levels of perception regarding how the utility is managed.

Though customers can not physically leave you, they can emotionally leave you and when they do, it becomes an extreme challenge to garner their participation or support for utility initiatives.

Electricity customers' loyalty – … Is a company that you would like to continue to do business with			
	Tillsonburg Hydro	**National**	**Ontario**
Top 2 Boxes: 'Definitely + Probably' would continue	89%	75%	77%
Definitely would continue	67%	42%	43%
Probably would continue	22%	33%	33%
Might or might not continue	2%	4%	4%
Probably would not continue	2%	6%	6%
Definitely would not continue	2%	5%	5%

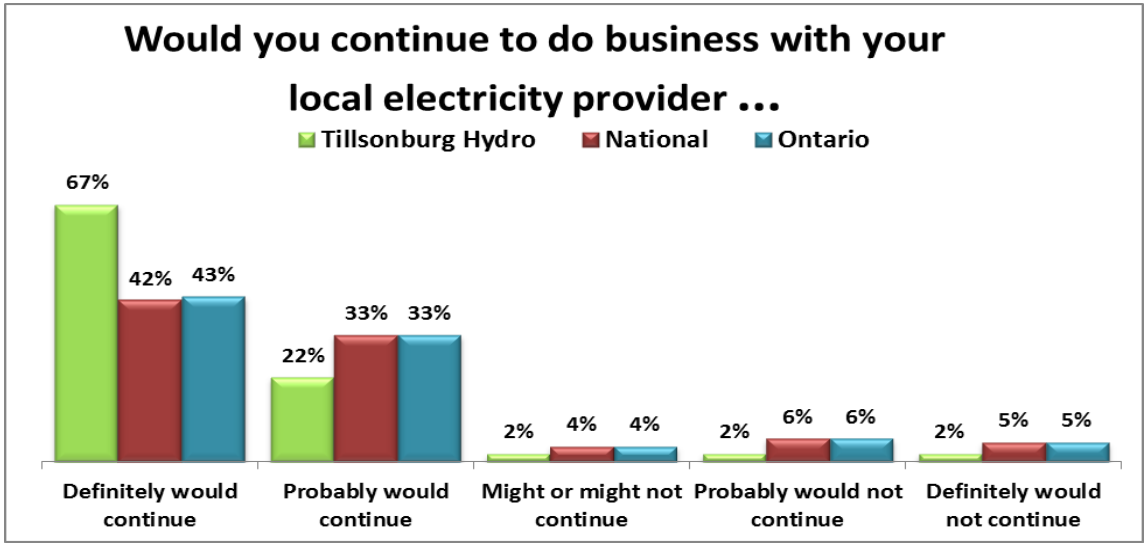
Base: total respondents

Electricity customers' loyalty – … Is a company that you would like to continue to do business with				
Tillsonburg Hydro	**<$40K**	**$70K+**	**18-34**	**55+**
Top 2 Boxes: 'Definitely + Probably' would continue	89%	85%	85%	90%

Base: total respondents

Electricity customers' loyalty – Is a company that you would like to continue to do business with			
Tillsonburg Hydro	**kWh Group 1**	**kWh Group 2**	**kWh Group 3**
Top 2 boxes: 'Definitely + Probably' would continue	90%	92%	82%

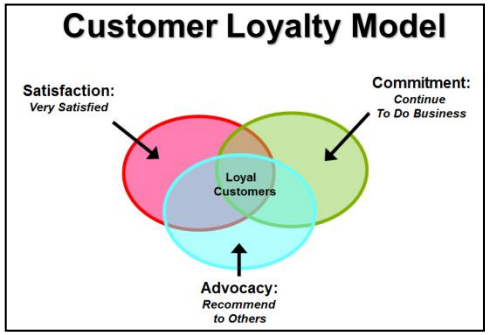
Base: total respondents / Group 1 represents 25% of the customer base derived from segmenting the customer data file into the first quartile of kWh usage. Group 2 represents the middle 50% of the customer base; and Group 3 represents the top quartile of kWh customers.



Base: total respondents

Word of mouth

Advocacy is one of the metrics measured in determining customer loyalty. Essentially, experts believe a loyal customer is one that is spreading the value of the business to others, leading new people to the business and helping the company grow. Customer referrals, endorsements and spreading the word are extremely important forms of customer behaviour. For LDCs this is about generating positive referants about the LDC as a relevant and valuable enterprise.



When customers are loyal to a company, product or service, they not only are more likely to purchase from that company again, but they are more likely to recommend it to others – to openly share their positive feelings and experiences with others. In today's world, thanks to the Internet, they can tell and influence millions of people. That equates to new customers and revenue. The same holds true, if not more, when customers are disloyal. Disgruntled customers could share their negative experiences with an ever-widening audience, jeopardizing a company's reputation and resulting in fewer engaged customers and/or customers who are Favourable or Secure. Secure customers, typically are advocates and they are deeply connected and brand-involved.

There are two forms of word of mouth which utilities need to understand. The first is Experience-based word of mouth which is the most common and most powerful form. It results from a customer's direct experience with the utility or the re-statement of a direct experience from a trusted source.

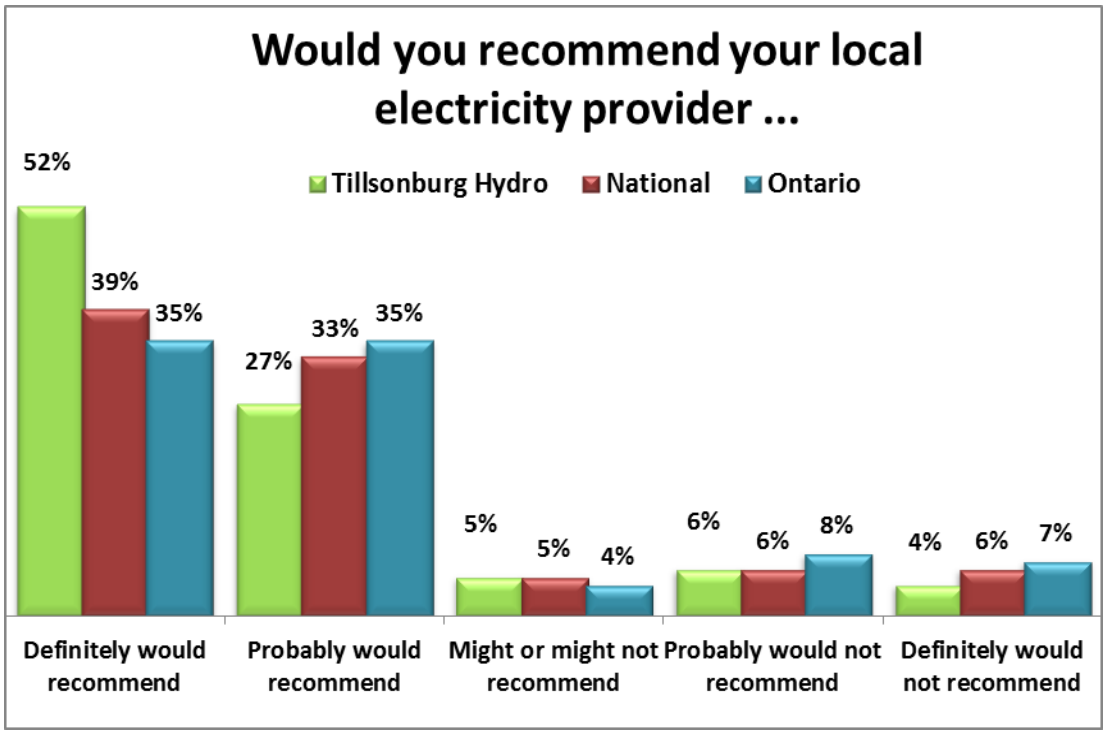
The second is Relay-based word of mouth. This is when customers pass along important messages to others based on what they have learned through the more traditional forms of communications. For example, if the utility was communicating an offer for "free LED lights" chances are high that the offer will be "relayed" to others through word of mouth.

For an electric utility, specific examples of potential positive advocacy behaviour include:

Recommending that other customers specifically locate in the geographic area that is serviced by that utility

- *Supporting the utility's positions or actions on energy-related public issues, including the environment*
- *Supporting the utility's position on the location and construction of facilities*
- *Providing testimonials about positive experiences with the utility*

Would you tell me if you agree or disagree with the following statement? Tillsonburg Hydro is a company that you would recommend to a friend or colleague …



Base: total respondents

Word of mouth communication is a very powerful form of communication and influence. When customers are speaking to other customers (or their peers) it is more credible, goes through less perceptual filters and can enhance the view of services or products provided better than marketing communication.

Electricity customers' loyalty – … is a company you would recommend to a friend or colleague			
	Tillsonburg Hydro	**National**	**Ontario**
Top 2 boxes: 'Definitely + Probably' would recommend	79%	72%	71%
Definitely would recommend	52%	39%	35%
Probably would recommend	27%	33%	35%
Might or might not recommend	5%	5%	4%
Probably would not recommend	6%	6%	8%
Definitely would not recommend	4%	6%	7%

Base: total respondents

Electricity customers' loyalty – is a company you would recommend to a friend or colleague				
Tillsonburg Hydro	**<$40K**	**$70K+**	**18-34**	**55+**
Top 2 boxes: 'Definitely + Probably' would recommend	78%	72%	76%	81%

Base: total respondents

Electricity customers' loyalty – is a company you would recommend to a friend or colleague			
Tillsonburg Hydro	**kWh Group 1**	**kWh Group 2**	**kWh Group 3**
Top 2 boxes: 'Definitely + Probably' would recommend	84%	80%	71%

Base: total respondents / Group 1 represents 25% of the customer base derived from segmenting the customer data file into the first quartile of kWh usage. Group 2 represents the middle 50% of the customer base; and Group 3 represents the top quartile of kWh customers.

Corporate Credibility & Trust

In today's world, with the Internet and twenty-four-hour media/news coverage on TV, corporate reputations which take decades to build can be destroyed in one news cycle. With disgraced executives making headlines everywhere, corporations must demonstrate social and moral responsibility as a matter of their own survival. Reputation matters, now more than ever. Corporate behaviours and corporate social responsibilities has always been the central point of corporate reputation. Trust is an indispensable part of corporate reputation and is also an important prerequisite for the formation of customer loyalty.

Based on economic and other societal impacts many Canadians have been using words such as credibility and trust to describe their place of work or the place(s) where they do business. Yet if you ask 5 people for a definition of credibility and trust chances are you'll get 5 definitions. Trust and credibility are indicators of the degree of confidence stakeholders have in your organization's ability to deliver on its commitments. Trust and credibility are outcomes based on what your utility actually does, not what it might be doing.

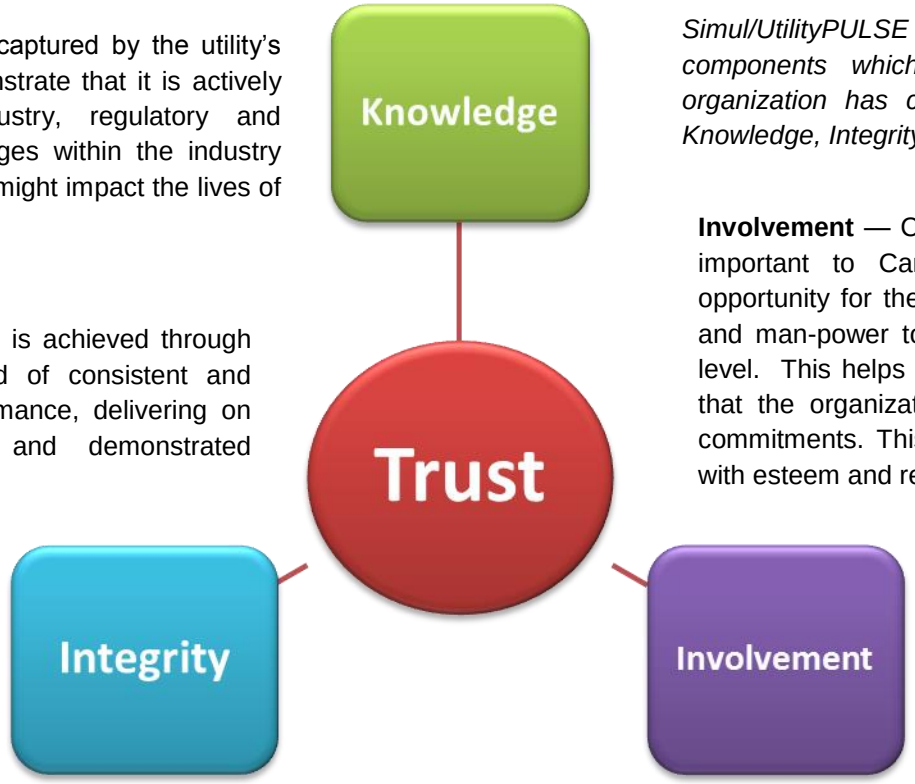
Attributes strongly linked to Credibility & Trust			
	Tillsonburg Hydro	National	Ontario
Keeps its promises to customers and the community	87%	79%	80%
Customer-focused and treats customers as if they're valued	87%	74%	76%
Is a trusted and trustworthy company	90%	81%	81%

Base: total respondents with an opinion

Knowledge is captured by the utility's ability to demonstrate that it is actively aware of industry, regulatory and economic changes within the industry and how these might impact the lives of customers.

Trust — Trust is achieved through a track record of consistent and reliable performance, delivering on commitments and demonstrated accountability.

Integrity is established by demonstrating adherence to a code of conduct. It requires consistently acting in accordance with the values and goals that have been communicated to customers.



Simul/UtilityPULSE research shows the under-pinning components which lead customers to believe an organization has credibility and can be trusted are: Knowledge, Integrity, Involvement and Trust.

Involvement — Corporate Involvement is increasingly important to Canadian communities as it is an opportunity for their local utility to use their resources and man-power to benefit people at the community level. This helps to build credibility as customers see that the organization is acting and delivering on its commitments. This helps customers regard the utility with esteem and respect.

Credibility and Trust Index

Tillsonburg Hydro 84%

Ontario 80%

National 83%

How can service to customers be improved?

Every business, even natural monopolies, need to keep a focus on its customers, its standards of operations and in being responsive to problems. Insights into what isn't working or what can be done to improve often come from customers. Continuous improvement is the new normal.

Customers are more informed, more aware, more conscious of what's going on around them and in this age of internet and social media, they are better equipped to influence service quality and outcomes. They have learned to compare products and services, to document and monitor customer service and satisfaction, and to request or demand higher quality. And, when things go wrong, customers also know they are "one click" away from the world knowing about it.

As a further way to identify pressure points and areas of concern, respondents were asked to give their top one or two priorities for improvement to their local utility's service.

Over the last couple of years there is heightened awareness for the need to maintain equipment, keep things up to date, improve reliability, and communicate effectively, but true to historical form the number one suggestion remains "better prices/lower rates".

And we are interested in knowing what you think are the one or two most important things Tillsonburg Hydro could do to improve service to their customers?

One or two most important things 'your local utility' could do to improve service	
Tillsonburg Hydro	**% of all suggestions**
Lower rates/ cut costs, save money	16%
Better communication with customers	4%
Upgrade equipment	2%
Improve/simplify/clarify billing	2%
Improve reliability of power	2%
Cut costs/save money	2%
Be more efficient/ more prompt	1%
Satisfied with service	7%
No improvements/other	14%
Don't know	37%

Base: total respondents with suggestions

What do customers think about electricity costs?

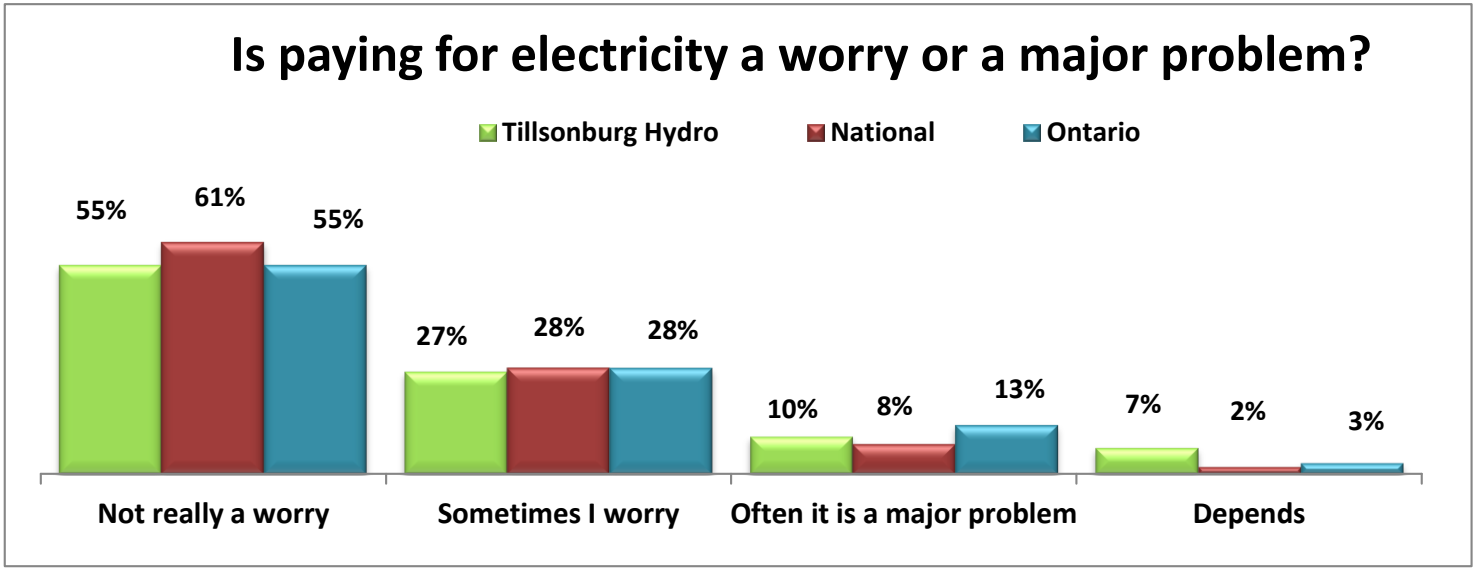
A conversation with almost any LDC customer will migrate into a conversation around cost. The concern around cost has little to do with age or income, or whether the customer uses a little or a lot of electricity – they all have a concern over costs. Unfortunately very few customers actually realize their LDC, (in a residential setting) is only taking about 18-20% of the total electricity bill. A customer concern over costs is first and foremost a concern over the total bill. It doesn't help that there have been industry issues, outside the control of the LDC, or the fact that rates for the commodity portion of the bill have gone up over 100%. Inflation over the same time frame is less than 25% and for many Ontarians salary increases have been very very low.

Beginning in 1999, our first year of dedicated research for the electric utility industry, and continuing on to 2016, there was a very high correlation between ability to pay and satisfaction. A truism about human nature is, when there is an absence of a value proposition the only thing people will focus on is price.

Next I am going to read a number of statements people might use about paying for their electricity. Which one comes closest to your own feelings, even if none is exactly right? Paying for electricity is not really a worry, Sometimes I worry about finding the money to pay for electricity, or Paying for electricity is often a major problem?

Is paying for electricity a worry or a major problem?				
	Not a worry	Sometimes	Often	Depends
Tillsonburg Hydro				
Tillsonburg Hydro 2016	55%	27%	10%	7%
National 2016	61%	28%	8%	2%
Ontario 2016	55%	28%	13%	3%

Base: total respondents



Base: total respondents

Is paying for electricity a worry or a major problem?				
	Not a worry	Sometimes	Often	Depends
Tillsonburg Hydro				
<$40,000	43%	37%	15%	4%
$40<$70,000	57%	26%	8%	9%
$70,000+	67%	22%	8%	0%

Base: total respondents

UtilityPULSE segmented respondents into 3 “average kWh groups”. Group 1 represents 25% of the customer base derived from segmenting the customer data file into the first quartile of kWh usage. Group 2 represents the middle 50% of the customer base; and Group 3 represents the top quartile of kWh customers. Group 1 uses the least amount of electricity on average, while Group 3 uses the most.

Is paying for electricity a worry or a major problem?			
	kWh Group 1	kWh Group 2	kWh Group 3
Not really a worry	60%	56%	49%
Sometimes I worry	27%	26%	29%
Often it is a major problem	2%	12%	12%
Depends	8%	5%	10%

Base: total respondents

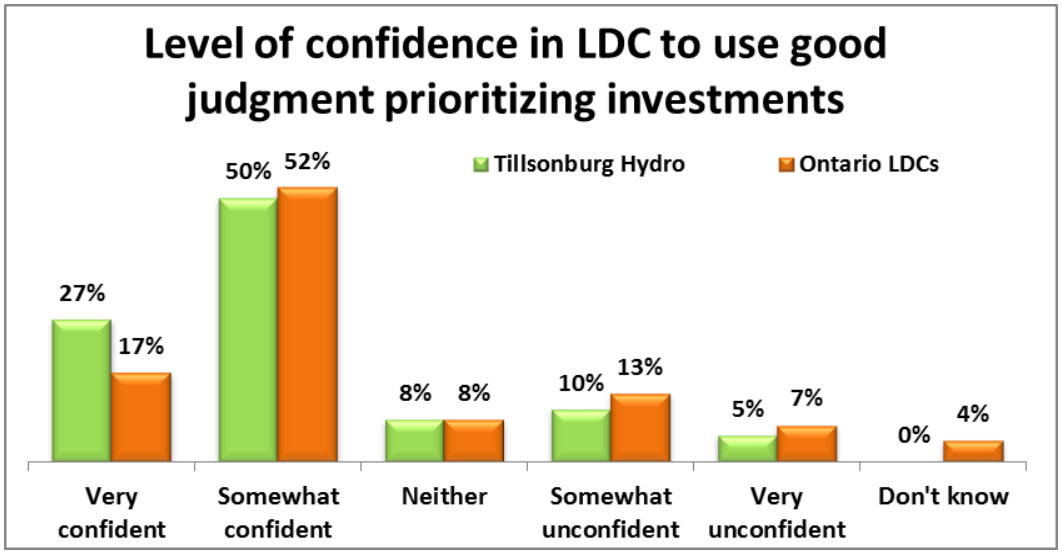
Is paying for electricity a worry or a major problem?				
	Not a worry	**Sometimes**	**Often**	**Depends**
Ontario				
2016	55%	28%	13%	3%
2015	59%	25%	10%	2%
2014	59%	26%	11%	2%
2013	66%	21%	11%	1%
2012	59%	27%	11%	2%
National				
2016	61%	28%	8%	2%
2015	67%	22%	8%	2%
2014	69%	20%	7%	3%
2013	70%	18%	8%	2%
2012	67%	22%	8%	2%

Base: Ontario and National benchmark surveys

Confidence Prioritizing Investments

Understanding customer expectations, concerns, and desires does help an LDC to build their plans to ensure they remain relevant, viable, and valuable to customers, employees and other stakeholders.

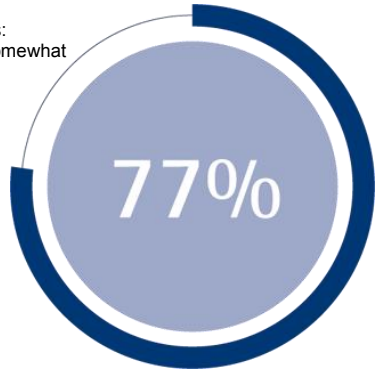
Responding customers really don't know how much things cost or even what it takes to complete various operational tasks or capital projects. However, customers recognize decisions made affect the bottom line which in turn affects pricing and 'pricing' affects customers. Therefore it is important to have confidence in LDC decision-makers. We have heard customers tell us "we expect those who are being paid will make good decisions." On the question of "level of confidence", Tillsonburg Hydro gets very good ratings.



Base: UtilityPulse Database / total respondents

Are Confident that Tillsonburg Hydro is using good judgment to prioritize investments

Base: total respondents:
Top 2 Boxes: 'very + somewhat confident'



Level of confidence in LDC to use good judgment prioritizing investments			
Tillsonburg Hydro	**Residential**	**Small Commercial**	**Large Commercial**
Top 2 Boxes: 'very + somewhat confident'	76%	80%	87%
Bottom 2 Boxes: 'very + somewhat unconfident'	16%	13%	0%

Base: total respondents

Level of confidence in LDC to use good judgment prioritizing investments			
Tillsonburg Hydro	**kWh Group 1**	**kWh Group 2**	**kWh Group 3**
Top 2 Boxes: 'very + somewhat confident'	76%	77%	76%
Bottom 2 Boxes: 'very + somewhat unconfident'	8%	18%	19%

Base: total respondents Base: total respondents / Group 1 represents 25% of the customer base derived from segmenting the customer data file into the first quartile of kWh usage. Group 2 represents the middle 50% of the customer base; and Group 3 represents the top quartile of kWh customers.

Level of confidence in LDC to use good judgment prioritizing investments			
Tillsonburg Hydro	**<$40K**	**$40 – 70K**	**$70K +**
Top 2 Boxes: 'very + somewhat confident'	77%	81%	74%
Bottom 2 Boxes: 'very + somewhat unconfident'	14%	13%	20%

Base: total respondents

Capital Expenses

UtilityPULSE has been conducting research in the LDC industry in Ontario for 18 years. However, members of UtilityPULSE have been doing customer research for much longer. It is true, customers (but not all) can tell you what they want, but they have a very difficult time telling you what they need.

On the one hand many customers "want" lower prices, but they "need" reliability and responsiveness. Hence, it is up to the professionals in the LDC to use their experience and judgment to determine what needs to be done and when it should be done. No easy task.

UtilityPULSE asked customers: *"As it relates to replacing equipment electric utilities typically follow 2 main practices which are: let equipment run-to-failure OR pro-actively replace equipment. Which of the following best represents your view on equipment replacement?"*

Strategy for replacing equipment		
	Ontario LDCs	**Tillsonburg Hydro**
Run-to-failure when there are limited customers affected ensures full-value is received from the equipment	27%	29%
Pro-active replacement, even though it may cost more, should ensure reliable power	65%	59%
Don't Know	8%	12%

Base: Extract from UtilityPULSE database Ontario LDCs / total respondents

55% of Residential and 75% of Tillsonburg Hydro small commercial respondents chose the statement “Pro-active replacement, even though it may cost more…” as the statement best describing their view about replacing equipment. 87% of Large commercial customers also subscribed to pro-active replacement.

Strategy for replacing equipment			
Tillsonburg Hydro	**Residential**	**Small Commercial**	**Large Commercial**
Run-to-failure when there are limited customers affected ensures full-value is received from the equipment	31%	22%	13%
Pro-active replacement, even though it may cost more, should ensure reliable power	55%	75%	87%
Don’t know	14%	3%	0%

Base: total respondents

Strategy for replacing equipment			
Tillsonburg Hydro	**kWh Group 1**	**kWh Group 2**	**kWh Group 3**
Run-to-failure when there are limited customers affected ensures full-value is received from the equipment	26%	32%	30%
Pro-active replacement, even though it may cost more, should ensure reliable power	55%	60%	58%
Don’t know	19%	8%	12%

Base: total respondents / Group 1 represents 25% of the customer base derived from segmenting the customer data file into the first quartile of kWh usage. Group 2 represents the middle 50% of the customer base; and Group 3 represents the top quartile of kWh customers.

Strategy for replacing equipment			
Tillsonburg Hydro	**<$40K**	**$40 – 70K**	**$70K +**
Run-to-failure when there are limited customers affected ensures full-value is received from the equipment	32%	40%	26%
Pro-active replacement, even though it may cost more, should ensure reliable power	49%	53%	66%
Don't know	19%	7%	8%

Base: total respondents

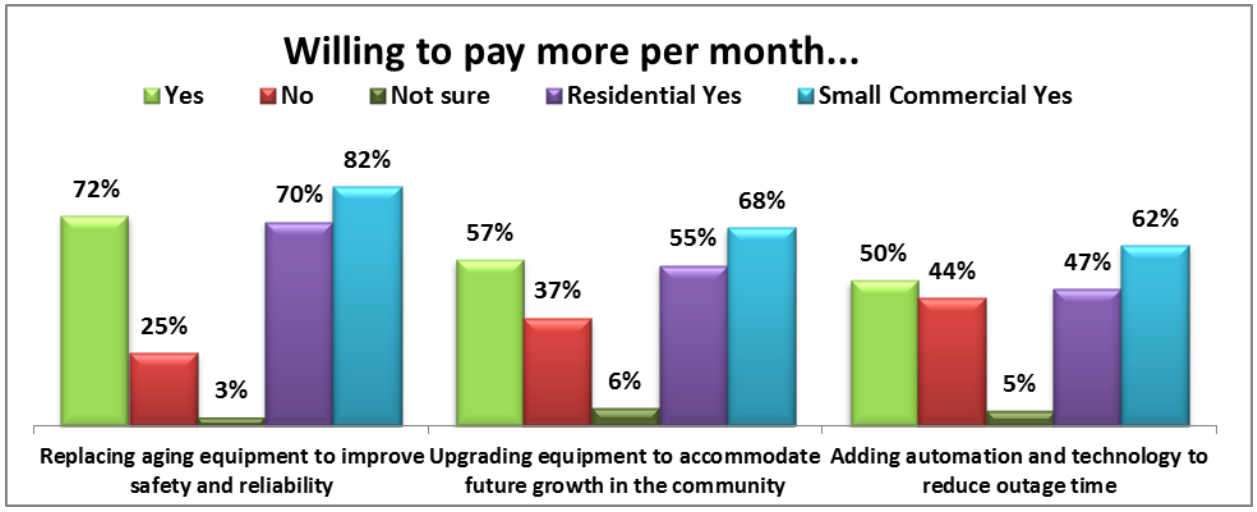
The drive to reduce capital expenditures is strong and understandably so, given the pressure on capital budgets. Many organizations, when faced with budget challenges, put off capital expenditures by trying to lengthen equipment/hardware life cycles. This pattern of stretching the useful life cycle of equipment has a number of near-term benefits for customers in terms of depreciating assets over a long period of time or prolonging an existing lease. But if a transition to new equipment or technologies has been deferred too long, then the time comes when the system has fallen far behind the performance and cost-efficiency levels.

Many residential customers have an understanding of their own household equipment requirements but do not necessarily know what fulfilling those requirements in terms of an LDC is worth to them. Preventive maintenance has been more popular in principle than in practice. It gets hard to argue with the idea of keeping equipment well maintained to extend its expected life and avoid future repair costs. Less clear is an understanding of the actual relationship between the cost of preventive maintenance and the returns such activities can be expected to deliver. Commercial customers on the other hand face the same predicaments in

the operation of their respective businesses, so have a better appreciation of what capital expenditures mean to the business operations. Customers were asked about their willingness to pay more for the following capital expenditures:

Which of the following items are you willing to pay more for per month…Capital items					
Tillsonburg Hydro	**Yes**	**No**	**Not sure**	**Residential Yes**	**Small Commercial Yes**
Replacing aging equipment to improve safety and reliability	72%	25%	3%	70%	82%
Upgrading equipment to accommodate future growth in the community	57%	37%	6%	55%	68%
Adding automation and technology to reduce outage time	50%	44%	5%	47%	62%

Base: total respondents



Base: total respondents

Which of the following items are you willing to pay more for per month…Capital items			
Tillsonburg Hydro	**kWh Group 1**	**kWh Group 2**	**kWh Group 3**
Replacing aging equipment to improve safety and reliability	72%	74%	68%
Upgrading equipment to accommodate future growth in the community	56%	58%	56%
Adding automation and technology to reduce outage time	55%	48%	46%

Base: total respondents

Which of the following items are you willing to pay more for per month…Capital items			
Tillsonburg Hydro	**<$40K**	**$40 – 70K**	**$70K +**
Replacing aging equipment to improve safety and reliability	62%	80%	71%
Upgrading equipment to accommodate future growth in the community	45%	62%	60%
Adding automation and technology to reduce outage time	39%	55%	49%

Base: total respondents

How much more per month – 1 Capital item				
Tillsonburg Hydro	**Overall**	**Residential**	**Small Commercial**	**Large Commercial**
$0.50 or less	51%	53%	40%	0%
$0.51 - $1.00	13%	12%	0%	100%
$1.01 - $2.00	11%	10%	20%	0%
$2.01 - $3.00	2%	2%	0%	0%
$3.01 - $5.00	11%	10%	20%	0%
$5.01+	13%	12%	20%	0%

Base: total respondents willing to pay more, small data sample creates larger data swings

How much more per month -- 2 Capital items				
Tillsonburg Hydro	**Overall**	**Residential**	**Small Commercial**	**Large Commercial**
$0.50 or less	32%	35%	15%	20%
$0.51 - $1.00	11%	13%	0%	0%
$1.01 - $2.00	7%	7%	8%	0%
$2.01 - $3.00	4%	4%	8%	0%
$3.01 - $5.00	11%	11%	15%	0%
$5.01+	36%	30%	54%	80%

How much more per month -- 3 Capital items				
Tillsonburg Hydro	**Overall**	**Residential**	**Small Commercial**	**Large Commercial**
$0.50 or less	28%	32%	16%	17%
$0.51 - $1.00	6%	5%	9%	17%
$1.01 - $2.00	7%	7%	9%	0%
$2.01 - $3.00	4%	4%	6%	0%
$3.01 - $5.00	7%	8%	3%	17%
$5.01+	46%	44%	56%	50%

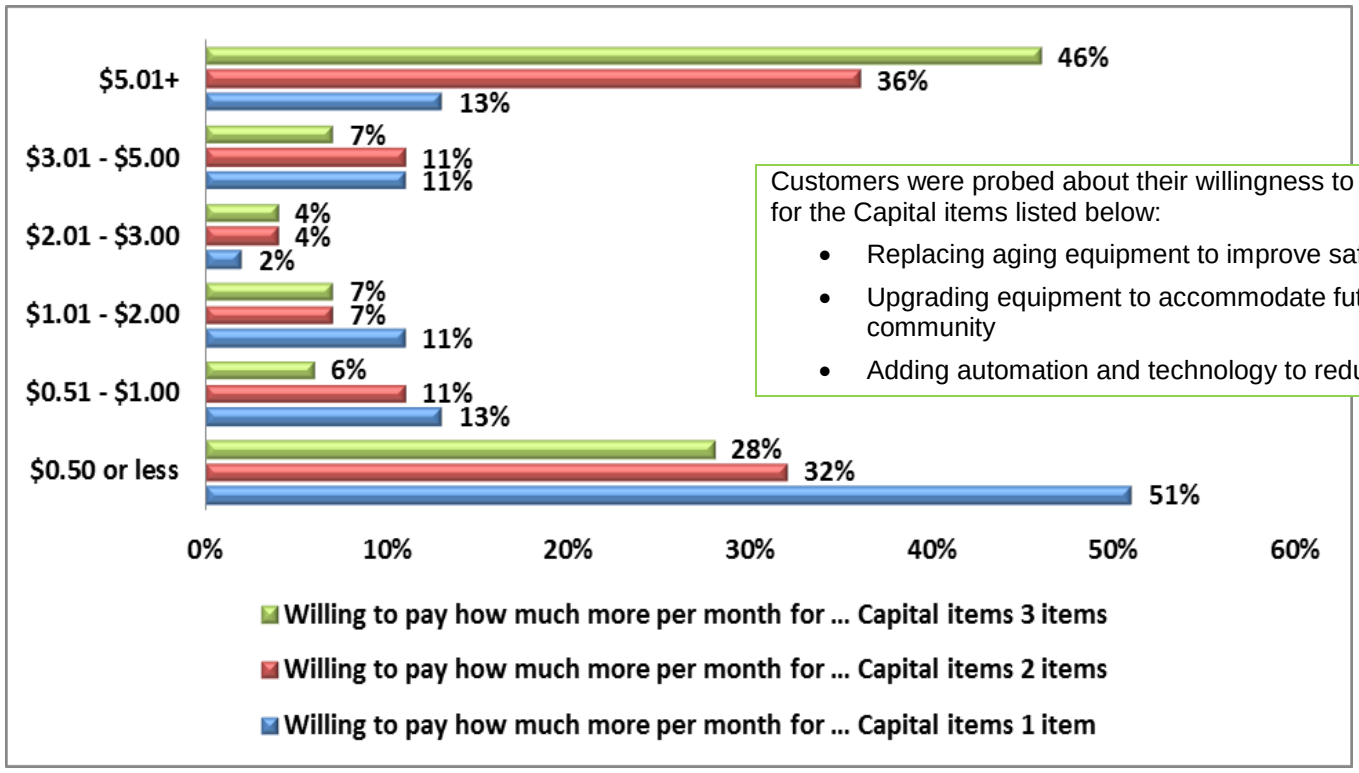
Base: total respondents willing to pay more, small data sample creates larger data swings

The amount customers are willing to pay for 1 item versus 3 items did not translate into a proportional increase. While customers recognize 3 items would necessitate more money than 1 item, fewer customers were willing to pay exponentially more for 3 items. However, they are more willing to pay for items providing a direct benefit to themselves.

Quantifiable data from the telephone survey about paying more for capital items indicates:

- 13% respondents were willing to pay more for 1 item
- 24% willing to pay more for 2 items
- 39% willing to pay more for 3 items
- 24% were not willing to pay more for any items.

Regardless of what Tillsonburg Hydro needs to do, or their rationale for doing so, the reality is about 1 in 4 customers are not willing to pay anything for any capital item. While it would seem logical to make Capital expenditures, particularly as it relates to replacing aging equipment for reliability & to keep equipment safe and up-to-date, for a significant number of customers there would be resistance of any increase regardless of the rationale to do so. It is interesting to note, 24% of respondents were not willing to support any increase for any capital item.



Customers were probed about their willingness to pay more per month for the Capital items listed below:

- Replacing aging equipment to improve safety and reliability
- Upgrading equipment to accommodate future growth in the community
- Adding automation and technology to reduce outage time

Base: total respondents

Operating Expenses

Much has been written and reported in regards to the cost of electricity. A goal of customer engagement, in addition to understanding wants & needs, is to reduce the worry customers have about the reliability and future costs of electricity. What readers may not know is, Tillsonburg Hydro has to focus on day-to-day operations while it builds, re-builds, re-furbishes and prepares the organization for a changed future. In addition, LDCs need to think in terms of decades, not just today, this week, this month, or this quarter. They need to do so in a regulated environment that is a 5 year planning environment. Respondents were asked to identify the items they were willing to pay more for and, they were asked "how much" they would be willing to pay.

Which of the following items are you willing to pay more for per month …			
Tillsonburg Hydro	**Yes**	**No**	**Not sure**
A proactive outage management system	46%	49%	5%
Increased self-service options on the website	25%	67%	8%
Extended office hours	11%	85%	4%
Increased tree trimming to improve reliability	54%	43%	3%
Educating customers about energy conservation	41%	56%	3%
Educating customers and the public about electrical safety	37%	62%	2%

Base: total respondents

Tillsonburg Hydro customers responding to the telephone survey showed lower levels of willingness to pay for various operational items compared to the UtilityPULSE Database.

For those who said they would pay more, the following illustrates the amounts they would be willing to pay:

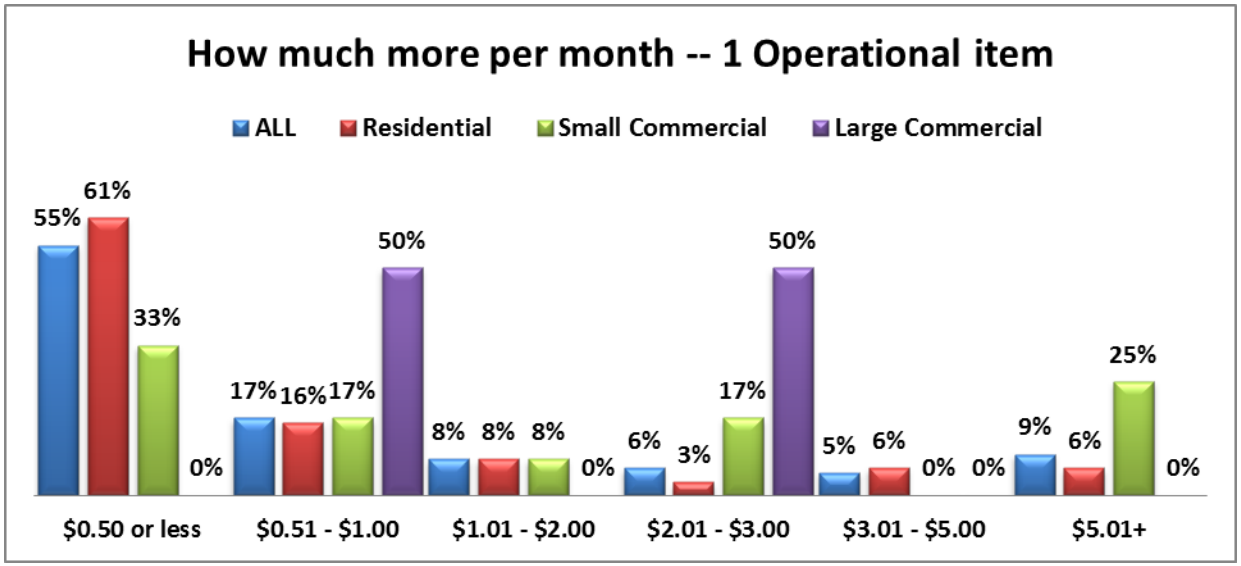
Willing to pay how much more per month for … Operational items			
Tillsonburg Hydro	**1 item**	**2 items**	**3 or more items**
$0.50 or less	55%	40%	33%
$0.51 – $1.00	17%	12%	9%
$1.01 – $2.00	8%	11%	11%
$2.01 – $3.00	6%	2%	3%
$3.01 – $5.00	5%	11%	9%
$5.01+	9%	25%	36%

Base: total respondents willing to pay more

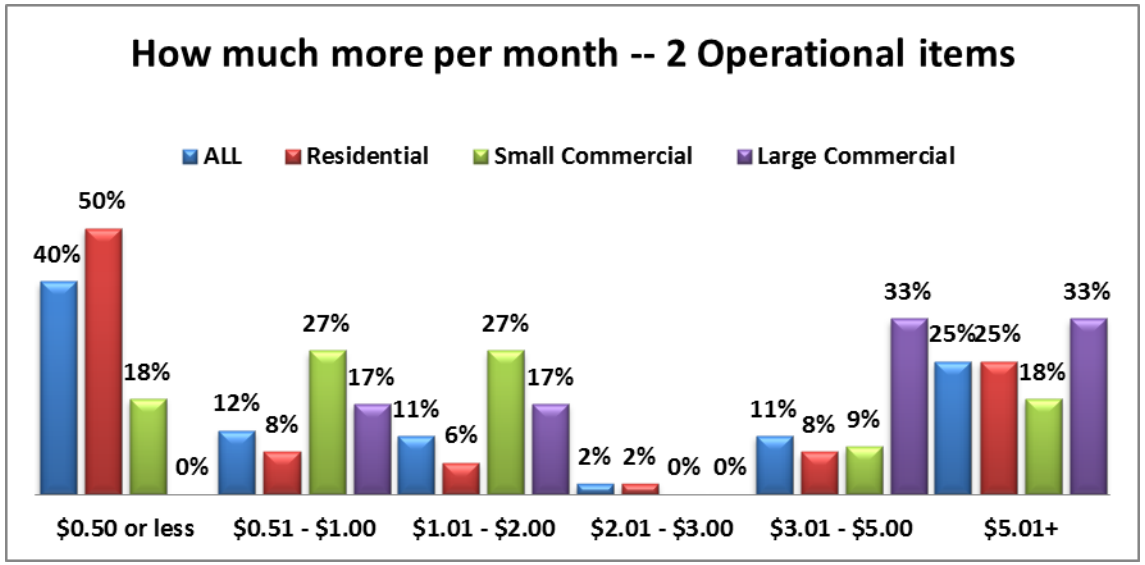
Respondents were not guided by the interviewer providing various ranges of rates.

Respondents were simply asked to give an amount of $.

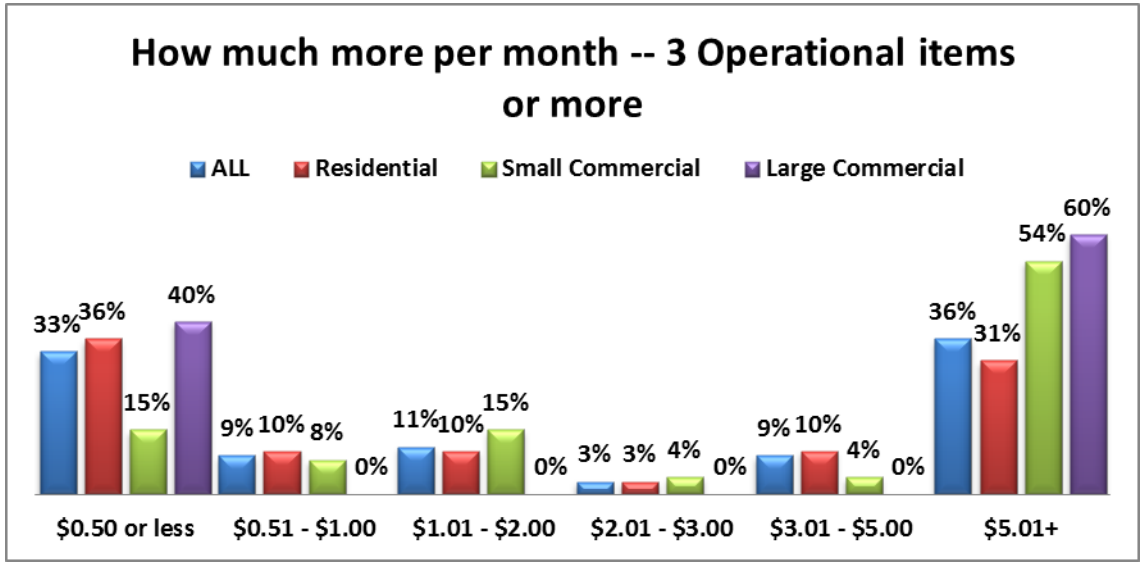
Their answers were categorized into one of the rate ranges shown in the table.



Base: total respondents willing to pay more



Base: total respondents willing to pay more



Base: total respondents willing to pay more

How much more per month -- 3 or more Operational items			
Tillsonburg Hydro	**Residential**	**Small Commercial**	**Large Commercial**
$0.50 or less	36%	15%	40%
$0.51 - $1.00	10%	8%	0%
$1.01 - $2.00	10%	15%	0%
$2.01 - $3.00	3%	4%	0%
$3.01 - $5.00	10%	4%	0%
$5.01+	31%	54%	60%

Base: total respondents willing to pay more

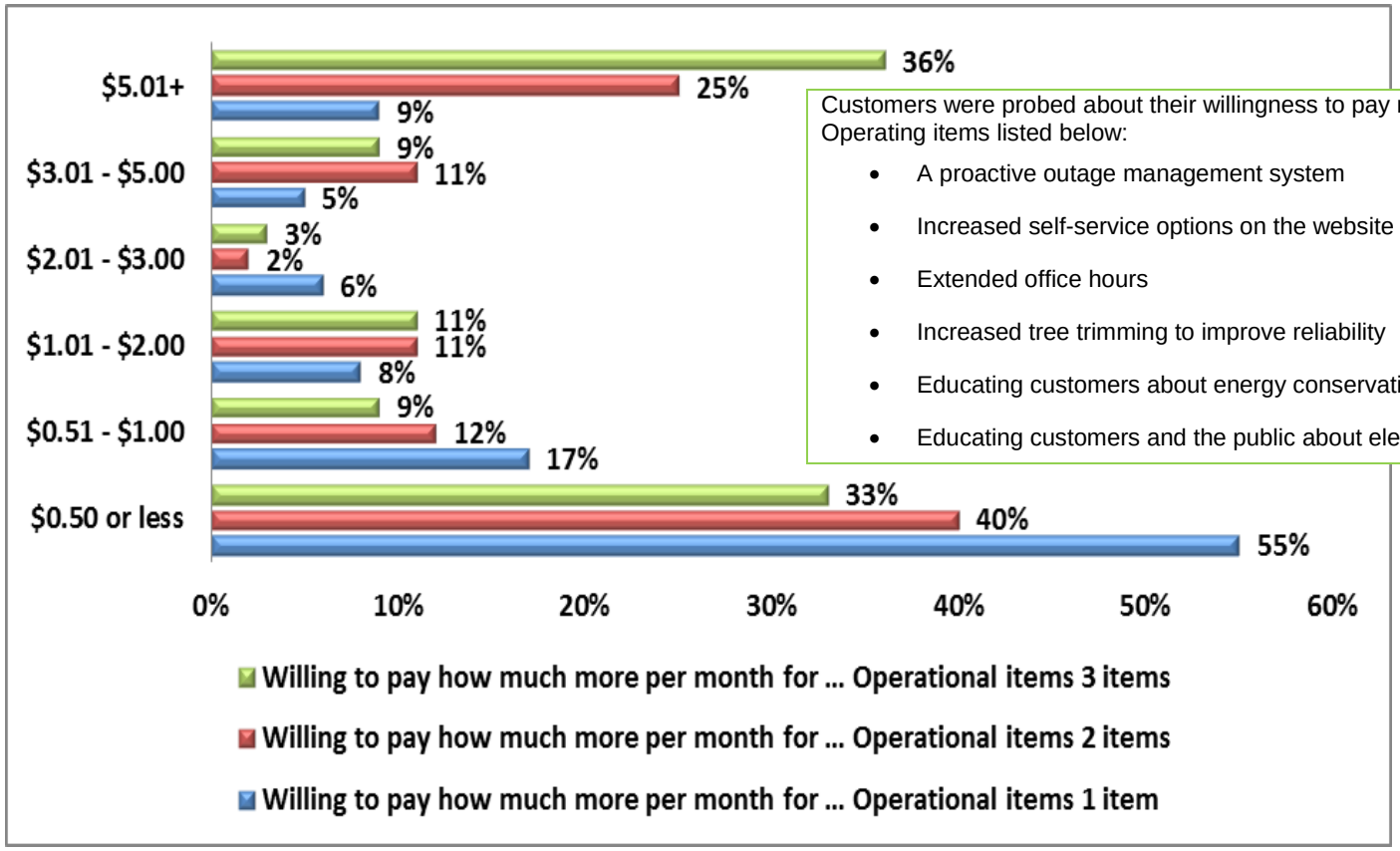
How much more per month -- 3 or more Operational items			
Tillsonburg Hydro	**kWh Group 1**	**kWh Group 2**	**kWh Group 3**
$0.50 or less	29%	30%	40%
$0.51 - $1.00	10%	10%	8%
$1.01 - $2.00	5%	14%	12%
$2.01 - $3.00	2%	3%	5%
$3.01 - $5.00	19%	6%	5%
$5.01+	36%	37%	30%

Base: total respondents willing to pay more

Not surprisingly lower income respondents identified lower amounts. The threshold for lower income respondents favoured 50 cents or less, for example, 42% of respondents <40K who were willing to pay for three operational items identified a number less than 50 cents, it was 28% for respondents 70K+. However for the threshold of $5.01 or more, only 32% of respondents <40K who were willing to pay for three operational items compared to 42% of those in the higher income bracket of $70K+.

The UtilityPULSE Ontario database shows Secure customers identified a willingness to pay higher amounts more frequently than At Risk customers. When three or more operational items were involved, At Risk

customers pick a number less than 50 cents, 66% of the time; Secure customers was 37%. Said a different way, only 34% of At Risk customers are willing to pay more than 50 cents for three or more operational items, while 66% of Secure customers would be willing to do so. This proves price increase receptivity is linked to customer affinity.



Customers were probed about their willingness to pay more per month for the Operating items listed below:

- A proactive outage management system
- Increased self-service options on the website
- Extended office hours
- Increased tree trimming to improve reliability
- Educating customers about energy conservation
- Educating customers and the public about electricity safety

Base: total respondents willing to pay more

Quantifiable data from the telephone survey about paying more for operational items indicates:

- 19% respondents were willing to pay more for 1 item
- 16% willing to pay more for 2 items
- 40% willing to pay more for 3 items
- 25% were not willing to pay more for any items.

The above data and charts can certainly fuel debate between industry professionals, regulators, interveners and customers. Could an LDC ignore investing in self-service options on their website? Do the raw scores from the survey represent what the LDC needs to do? If the LDC didn't invest in increased self-service options what might happen to operational costs? What might happen to the perceived brand of the LDC i.e., being seen as a modern enterprise?

Elasticity in willingness to pay more per month

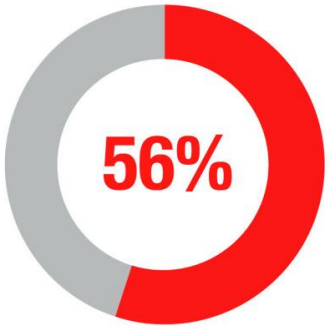
It is true; self-interest will drive the choices people make. If an operational or capital item directly affects the respondent, then there is a willingness to support paying more per month. For example, 54% said they would pay more for tree-trimming. If a customer can see a benefit then there is higher level of support for paying more money. For example, respondents in the 18-34 age range are much more likely to be willing to pay more for "a pro-active outage management communication system" than respondents in the 55+ age range. Receptivity for paying more increases when there is a direct benefit to the customer or the customer sees the cost as a means to avoid adverse consequences (pain).

Data from respondents of Tillsonburg Hydro' telephone survey who were asked if they were willing to pay more for any of the operational items, 25% were not willing to pay more for ANY of the operational items, 24% for capital items. Proof there is a significant number of people not willing to pay more for anything. It is extremely important increases in rates are tied to customer benefits.

It is also important to note, data from all sources shows survey respondents do not have a sense of what things cost. Telling a customer an item/project costs $750,000 means little, but telling them it would increase their bill by $2.00 puts it in a context the customer can certainly understand. It is not the amount of the investment rather it is the impact of the investment that matters most.

As stated earlier about 1 in 4 customer respondents indicated they do not support any increase for any capital expense item or any operational expense item. This is a significant level of resistance.

‘Customers are well served by the electricity system in Ontario’ – do you agree?



- 56% Agree (‘strongly + somewhat’) customers are well served by the electricity system in Ontario
- 12% neither agree or disagree
- 27% Disagree (‘strongly + somewhat’) they are well served
- 6% did not render an opinion or did not know

‘Customers are well served by the electricity system in Ontario’ – do you agree?				
Tillsonburg Hydro	**Overall**	**< $40k**	**$40k < $70k**	**$70k+**
Strongly Agree	22%	29%	26%	20%
Somewhat Agree	34%	38%	30%	37%
Neither	12%	3%	9%	9%
Somewhat disagree	13%	12%	17%	12%
Strongly disagree	14%	8%	17%	20%

Base: total respondents

‘Customers are well served by the electricity system in Ontario’ – do you agree?				
Tillsonburg Hydro	**Overall**	**Residential**	**Small Commercial**	**Large Commercial**
Strongly Agree	22%	24%	15%	7%
Somewhat Agree	34%	34%	33%	40%
Neither	12%	9%	2%	40%
Somewhat disagree	13%	13%	12%	7%
Strongly disagree	14%	14%	17%	7%

Base: total respondents

Electric Utility Industry Knowledge

Beyond knowing that electricity is needed to maintain their day to day activities, does the average person feel they are actually knowledgeable about the electric utility industry?

Knowledge level about the electric utility industry				
Tillsonburg Hydro	**Overall**	**Residential**	**Small Commercial**	**Large Commercial**
Extremely knowledgeable	4%	4%	2%	7%
Very knowledgeable	10%	9%	15%	7%
Moderately knowledgeable	47%	48%	45%	53%
Slightly knowledgeable	23%	23%	28%	20%
Not very knowledgeable	14%	15%	10%	13%
Don't know	1%	1%	0%	0%

Base: total respondents

Two-thirds (61%) of those polled considered themselves moderately to extremely knowledgeable about the electric industry. 61% of residential respondents considered themselves moderately to extremely knowledgeable about the electric industry, versus 62% Small Commercial customers and 67% of Large Commercial customers.

Tillsonburg Hydro and a Merge

A merger might present a wide variety of cost-containment, product line and economies of scale benefits for two or more LDCs, but whether the union is a good idea also comes down to how the public accepts it.

How favourable would you look on Tillsonburg Hydro merging with other utilities in the area?				
Tillsonburg Hydro	**Overall**	**Residential**	**Small Commercial**	**Large Commercial**
Very favourable	10%	10%	7%	20%
Somewhat favourable	26%	22%	45%	33%
Neither	1%	1%	0%	0%
Somewhat unfavourable	20%	20%	17%	33%
Very unfavourable	38%	41%	30%	13%
Don't know	1%	1%	0%	0%

Base: total respondents

Favourable towards Tillsonburg Hydro merging with other utilities

Base: total respondents:
Top 2 Boxes: 'very + somewhat favourable'

Unfavourable towards Tillsonburg Hydro merging with other utilities

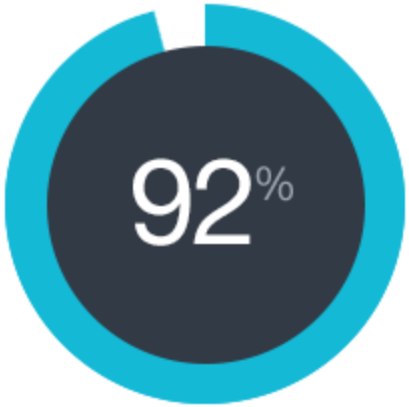
Base: total respondents:
Top 2 Boxes: 'very + somewhat unfavourable'

Tillsonburg Hydro and the Public Interest

Importance of Tillsonburg Hydro remaining a local distributor of electricity to the community

Tillsonburg Hydro serves more than 6,500 customers covering 22 square kilometres in the Town of Tillsonburg. If Tillsonburg Hydro were to be acquired and merged into a regional distributor, how would this change affect the local autonomy of the town over its own utility services? An earlier survey question probing around the favourability of a merger found 36% of respondents were favourable versus a majority 58% looking upon a merger unfavourably.

Tillsonburg Hydro respondents were also asked how important it was to them that Tillsonburg Hydro remain a local distributor of electricity to the community. An overwhelming 92% of respondents felt it is important Tillsonburg Hydro remain the local distributor of electricity.



Feel it is important Tillsonburg Hydro remain a local distributor of electricity to the community

Base: total respondents:
Top 2 Boxes: 'very + somewhat important'

Importance of Tillsonburg Hydro remaining a local distributor of electricity to the community				
Tillsonburg Hydro	**Overall**	**Residential**	**Small Commercial**	**Large Commercial**
Very important	67%	68%	68%	40%
Somewhat important	25%	25%	22%	40%
Neither important or unimportant	0%	0%	0%	0%
Somewhat unimportant	3%	3%	5%	13%
Very unimportant	2%	1%	5%	7%
Don't know	2%	3%	0%	0%

Base: total respondents

Importance of Tillsonburg Hydro remaining a local distributor of electricity to the community						
Tillsonburg Hydro	**<$40K**	**$40K < $70K**	**$70K+**	**18-34**	**35-54**	**55+**
Top 2 Boxes: 'very + somewhat important'	96%	93%	87%	98%	91%	93%
Bottom 2 Boxes: 'very + somewhat unimportant'	2%	6%	8%	2%	5%	4%

Base: total respondents

No matter from which demographic slice this question is viewed from, the results indicate that the people of Tillsonburg want Tillsonburg Hydro to remain their LDC.

Importance of Tillsonburg Hydro to support local programs and events

Feel it is important for Tillsonburg Hydro to support local programs and events

Base: total respondents:
Top 2 Boxes: 'very + somewhat important'

There is a shift in views of importance between older respondents 55+ (68%) versus younger respondents aged 18-34 (83%), as well as, high income bracket of $70K+ (63%) versus medium (81%) to low income bracket of less than $40K (72%).

Importance of Tillsonburg Hydro supporting local programs and events				
Tillsonburg Hydro	**Overall**	**Residential**	**Small Commercial**	**Large Commercial**
Very important	34%	35%	32%	27%
Somewhat important	35%	35%	35%	27%
Neither important or unimportant	1%	1%	0%	0%
Somewhat unimportant	14%	11%	27%	33%
Very unimportant	12%	13%	7%	13%
Don't know	3%	4%	0%	0%

Base: total respondents

Importance of Tillsonburg Hydro supporting local programs and events						
Tillsonburg Hydro	**<$40K**	**$40K < $70K**	**$70K+**	**18-34**	**35-54**	**55+**
Top 2 Boxes: 'very + somewhat important'	72%	81%	63%	83%	69%	68%
Bottom 2 Boxes: 'very + somewhat unimportant'	19%	19%	35%	17%	27%	24%

Base: total respondents

Importance of Tillsonburg Hydro to provide good jobs in the community

Feel it is important for Tillsonburg Hydro to provide good jobs in the community

Base: total respondents:
Top 2 Boxes: 'very + somewhat important'

Importance of Tillsonburg Hydro providing good jobs in the community				
Tillsonburg Hydro	**Overall**	**Residential**	**Small Commercial**	**Large Commercial**
Very important	69%	70%	68%	60%
Somewhat important	25%	25%	22%	33%
Neither important or unimportant	0%	1%	0%	0%
Somewhat unimportant	2%	1%	8%	7%
Very unimportant	2%	2%	2%	0%
Don't know	1%	1%	0%	0%

Base: total respondents

Importance of Tillsonburg Hydro providing good jobs in the community						
Tillsonburg Hydro	**<$40K**	**$40K < $70K**	**$70K+**	**18-34**	**35-54**	**55+**
Top 2 Boxes: 'very + somewhat important'	95%	100%	90%	98%	98%	94%
Bottom 2 Boxes: 'very + somewhat unimportant'	3%	0%	8%	2%	2%	4%

Base: total respondents

Importance of Tillsonburg Hydro to provide a dividend out of profits that the town can use for community projects, or to reduce taxes

82%

Feel it is important for Tillsonburg Hydro to provide a dividend out of profits that the town can use for the community

Base: total respondents:
Top 2 Boxes: 'very + somewhat important'

Importance of Tillsonburg Hydro providing a dividend out of profits that the town can use for the community				
Tillsonburg Hydro	**Overall**	**Residential**	**Small Commercial**	**Large Commercial**
Very important	49%	51%	47%	27%
Somewhat important	32%	32%	33%	33%
Neither important or unimportant	0%	1%	0%	0%
Somewhat unimportant	5%	4%	8%	20%
Very unimportant	9%	8%	10%	20%
Don't know	3%	4%	2%	0%

Base: total respondents

Importance of Tillsonburg Hydro providing a dividend out of profits that the town can use for the community						
Tillsonburg Hydro	**<$40K**	**$40K < $70K**	**$70K+**	**18-34**	**35-54**	**55+**
Top 2 Boxes: 'very + somewhat important'	81%	89%	83%	95%	93%	77%
Bottom 2 Boxes: 'very + somewhat unimportant'	9%	9%	16%	5%	7%	16%

Base: total respondents

Importance of Tillsonburg Hydro to provide tools and information to help customers reduce electricity consumption

Feel it is important for Tillsonburg Hydro to provide tools and information to help customers reduce electricity consumption

Base: total respondents:
Top 2 Boxes: 'very + somewhat important'

Importance of Tillsonburg Hydro providing tools and information to help customers reduce electricity consumption				
Tillsonburg Hydro	**Overall**	**Residential**	**Small Commercial**	**Large Commercial**
Very important	42%	44%	37%	40%
Somewhat important	38%	37%	42%	33%
Neither important or unimportant	1%	1%	0%	0%
Somewhat unimportant	11%	11%	15%	13%
Very unimportant	6%	6%	7%	13%
Don't know	1%	1%	0%	0%

Base: total respondents

Importance of Tillsonburg Hydro providing tools and information to help customers reduce electricity consumption						
Tillsonburg Hydro	**<$40K**	**$40K < $70K**	**$70K+**	**18-34**	**35-54**	**55+**
Top 2 Boxes: 'very + somewhat important'	83%	90%	76%	80%	80%	81%
Bottom 2 Boxes: 'very + somewhat unimportant'	14%	9%	24%	20%	16%	16%

Base: total respondents

Thinking ahead…a look into the future

Looking through the microscope while simultaneously looking through the telescope is what helps companies be more relevant & successful today while they prepare to be successful again “tomorrow” in a changed world. Though there are many factors that can affect the level of consumption for larger customers, your 2016 survey did ask large customer respondents about the future.

…Thinking ahead over the next 1-2 years do you anticipate any changes to your business that would affect electricity consumption more than 5% up or down?	
	Tillsonburg Hydro
Yes	27%
No	67%
Not at liberty to say / Don’t know	7%

Base: Large Customer respondents, extremely small data sample.

What do small commercial customers think?

Based on data in the UtilityPULSE database, small commercial customers have relatively similar views about their utility. The tables associated with this report will contain your specific information as it relates to residential and commercial customers. A word of caution, smaller data samples create greater swings or spreads in the data.

An area of concern, is about the LDC's ability to "target" its communications to the type of business. Beyond having a contact telephone number, company name and address there isn't much "knowledge" about the small commercial customer. In a time when "targeted" communication is important, knowing the type of category of small commercial account would assist LDCs in delivering meaningful messages in an effective way. This could be particularly important in the area of energy conservation i.e., pulling together messages and programs for specific types of businesses. After all, a small restaurant is different from a small accounting office.

Small Commercial Customer (General Service < 50kW Demand)

A small commercial customer is defined by the OEB as a non-residential customer in a less than 50 kW demand rate class. These customers are similar to the residential customer in that their bill does not have a demand component to it and their charges are based upon KWH of consumption. Most of these customers would occupy small storefront locations or offices

Data from the 2016 Tillsonburg Hydro telephone survey:

Satisfaction: Pre & Post			
Satisfaction (Top 2 Boxes: 'very + somewhat satisfied')	**Residential**	**Small Commercial**	**Large Commercial**
Initially	88%	97%	100%
End of Interview	92%	95%	100%

Base: total respondents

As it relates to the six attributes associated with customer service:

Very or fairly satisfied with…	Residential	Small Commercial	Large Commercial
The time it took to contact someone	84%	80%	80%
The time it took someone to deal with your problem	68%	80%	80%
The helpfulness of the staff who dealt with your problem	80%	80%	100%
The knowledge of the staff who dealt with your problem	80%	80%	100%
The level of courtesy of the staff who dealt with your problem	84%	80%	100%
The quality of information provided by the staff member	72%	60%	80%

Base: total respondents, small data sample creates larger data swings

Overall satisfaction with most recent experience			
	Residential	Small Commercial	Large Commercial
Top 2 Boxes: 'very + somewhat satisfied'	56%	80%	100%
Bottom 2 Boxes: 'somewhat + very dissatisfied'	36%	20%	0%

Base: total respondents, small data sample creates larger data swings

Loyalty comparisons between Residential and Commercial			
Loyalty Groups	Residential	Small Commercial	Large Commercial
Secure	31%	37%	27%
Still Favourable	5%	8%	20%
Indifferent	63%	55%	53%
At risk	1%	1%	0%

Base: total respondents

Loyalty Model Factors	Residential	Small Commercial	Large Commercial
Very/somewhat satisfied	88%	97%	100%
Definitely/probably would continue	88%	93%	80%
Definitely/probably would recommend	78%	83%	80%

Base: total respondents

Problems: Outages – Billing – Other			
	Residential	Small Commercial	Large Commercial
Respondents with problems	33%	27%	53%
Respondents who contacted the LDC about their problem	23%	31%	62%
Problem solved	56%	80%	100%

Base: total respondents, small data sample creates larger data swings

LDC effectiveness responding to outages			
	Residential	Small Commercial	Large Commercial
Responding to the power outage	88%	85%	87%
Restoring power quickly	92%	93%	93%
Using media channels for providing updates	60%	45%	53%
Providing information about the outage	66%	58%	73%

Base: total respondents

If Tillsonburg Hydro were to improve reliability where should they put more emphasis with the understanding a rate increase will be required?

Emphasis to Improve Reliability should be put on …			
	Residential	Small Commercial	Large Commercial
Reduce the number of outages	5%	7%	20%
Reduce the duration of outages	14%	20%	7%
Both with the understanding of a rate increase	63%	65%	60%
Don't know	17%	8%	13%

Base: total respondents

Some attributes describing the LDC			
	Residential	Small Commercial	Large Commercial
Deals professionally with customers' problems	89%	91%	91%
Customer focused and treats customers as if they're valued	86%	87%	91%
Is 'easy to do business with'	89%	92%	93%
Provides consistent reliable energy	93%	95%	92%
Accurate billing	85%	89%	94%
Quickly handles outages	92%	93%	89%
A leader in promoting energy conservation	80%	77%	85%
Keeps its promises to customers and the community	87%	85%	90%
Is trusted and trustworthy	90%	93%	95%
Operates a cost effective electricity distribution system	74%	76%	68%

Base: total respondents with an opinion

Strategy for replacing equipment			
	Residential	Small Commercial	Large Commercial
Run-to-failure when there are limited customers affected ensures full-value is received from the equipment	31%	22%	13%
Pro-active replacement, even though it may cost more, should ensure reliable power	55%	75%	87%
Don't know	14%	3%	0%

Base: total respondents

Which of the following items are you willing to pay more for per month … Operational items			
	Residential	Small Commercial	Large Commercial
A proactive outage management system	45%	52%	47%
Increased self-service options on the website	24%	30%	33%
Extended office hours	12%	7%	7%
Increased tree trimming to improve reliability	51%	68%	73%
Educating customers about energy conservation	41%	40%	33%
Educating customers and the public about electrical safety	38%	27%	47%

Base: total respondents

Which of the following items are you willing to pay more for per month…Capital items			
	Residential	Small Commercial	Large Commercial
Replacing aging equipment to improve safety and reliability	70%	82%	73%
Upgrading equipment to accommodate future growth in the community	55%	68%	40%
Adding automation and technology to reduce outage time	47%	62%	80%

Base: total respondents

'Customers are well served by the electricity system in Ontario' – do you agree?			
	Residential	Small Commercial	Large Commercial
Top 2 Box: 'Very + somewhat' confident	58%	48%	47%

Base: total respondents

Knowledge level about the electric utility industry			
	Residential	Small Commercial	Large Commercial
Extremely knowledgeable	4%	2%	7%
Very knowledgeable	9%	15%	7%
Moderately knowledgeable	48%	45%	53%
Slightly knowledgeable	23%	28%	20%
Not very knowledgeable	15%	10%	13%
Don't know	1%	0%	0%

Base: total respondents

How favourable would you look on Tillsonburg Hydro merging with other utilities in the area?			
	Residential	Small Commercial	Large Commercial
Very favourable	10%	7%	20%
Somewhat favourable	22%	45%	33%
Neither	1%	0%	0%
Somewhat unfavourable	20%	17%	33%
Very unfavourable	41%	30%	13%
Don't know	1%	0%	0%

Base: total respondents

Importance of Tillsonburg Hydro remaining a local distributor of electricity to the community			
	Residential	Small Commercial	Large Commercial
Very important	68%	68%	40%
Somewhat important	25%	22%	40%
Neither important or unimportant	0%	0%	0%
Somewhat unimportant	3%	5%	13%
Very unimportant	1%	5%	7%
Don't know	3%	0%	0%

Base: total respondents

Method

The findings in this report are based on telephone interviews conducted for Simul Corp. / UtilityPULSE by Logit Group between July 11 – July 19, 2016, with 415 respondents who pay or look after the electricity bills from a list of residential and small and medium-sized business customers supplied by Tillsonburg Hydro.

The sample of phone numbers chosen was drawn randomly to insure each business or residential phone number on the list had an equal chance of being included in the poll.

In sampling theory, in 19 cases out of 20 (95% of polls in other words), the results based on a random sample of 415 residential and commercial customers will differ by no more than ±4.8 percentage points where opinion is evenly split.

This means you can be 95% certain the survey results do not vary by more than 4.8 percentage points in either direction from results which would have been obtained by interviewing all Tillsonburg Hydro residential and small and medium-sized commercial customers.

The margin of error for the sub samples is larger. To see the error margin for subgroups use the calculator at http://www.surveysystem.com/sscalc.htm.

Interviewers reached 415 households and businesses from the customer list supplied by Tillsonburg Hydro. UtilityPulse interviewed 340 Residential, 60 Small Commercial and 15 Large Commercial customers.

The findings for the Simul/UtilityPULSE National Benchmark of Electric Utility Customers are based on telephone interviews conducted with adults throughout the country who are responsible for paying electric utility bills. The ratio of 85% residential customers and 15% small and medium-sized business customers in the National study reflects the ratios used in the local community surveys. The margin of error in the National poll is ±2.7 percentage points at the 95% confidence level.

For the National study, the sample of phone numbers chosen was drawn by recognized probability sampling methods to insure each region of the country was represented in proportion to its population and by a method that gave all residential telephone numbers, both listed and unlisted, an equal chance of being included in the poll.

The data were weighted in each region of the country to match the regional shares of the population.

The margin of error refers only to sampling error; other non-random forms of error may be present. Even in true random samples, precision can be compromised by other factors, such as the wording of questions or the order in which questions were asked.

Random samples of any size have some degree of precision. A larger sample is not always better than a smaller sample. The important rule in sampling is not how many respondents are selected but how they are selected. A reliable sample selects poll respondents randomly or in a manner that insures that everyone in the population being surveyed has an equal chance of being selected.

How can a sample of only several hundred truly reflect the opinions of thousands or millions of electricity customers within a few percentage points?

Measures of sample reliability are derived from the science of statistics. At the root of statistical reliability is probability, the odds of obtaining a particular outcome by chance alone. For example, the chances of having a coin come up heads in a single toss are 50%. A head is one of only two possible outcomes.

The chance of getting two heads in two coin tosses is less because two heads are only one of four possible outcomes: a head/head, head/tail, tail/head and tail/tail.

But as the number of coin tosses increases, it becomes increasingly more likely to get outcomes that are either close to or exactly half heads and half tails because there are more ways to get such outcomes. Sample survey reliability works the same way but on a much larger scale.

As in coin tosses, the most likely sample outcome is the true percentage of whatever we are measuring across the total customer base or population surveyed. Next most likely are outcomes very close to this true percentage. A statement of potential margin of error or sample precision reflects this.

Some pages in the computer tables also show the standard deviation (S.D.) and the standard error of the estimate (S.E.) for the findings. The standard deviation embraces the range where 68% (or approximately two-thirds) of the respondents would fall if the distribution of answers were a normal bell-shaped curve. The spread of responses is a way of showing how much the result deviates from the "standard mean" or average. In the Tillsonburg Hydro data on corporate image, Simul converted the answers to a point scale with 4 meaning agree strongly, 3 meaning agree somewhat and so on (see in the computer tables).

For example, the mean score is 3.73 for providing consistent, reliable electricity. The average is 3.43 for accurate billing.

For reliable electricity the standard deviation is 0.55. For cost effective system the S.D. is 1.02. These findings mean there is a wider range of opinion – meaning less consensus – about whether Tillsonburg Hydro operates a cost effective electricity distribution systems than about whether Tillsonburg Hydro energy supplies are reliable.

Beneath the S.D. in the tables is the standard error of the estimate. The S.E. is a measure of confidence or reliability, roughly equivalent to the error margin cited for sample sizes. The S.E. measures how far off the sample's results are from the standard deviation. The smaller the S.E., the greater the reliability of the data.

In other words, a low S.E. indicates that the answers given by respondents in a certain group (such as residential bill payers or women) do not differ much from the probable spread of the answers "predicted" in sampling and probability theory.

In certain instances, all of the sub-datasets from the entire UtilityPULSE database for 2016 were concatenated in order to use the average of all the control samples for comparison. The cumulated population base for these questions was in excess of 10,000.

At a 95% confidence level the margin of error is ±1.03 and at a 99% confidence level the margin of error would be ±1.36. So the aggregate strategy has given a very good population sample size which better, or more accurately, reflects the true feelings and beliefs of the population as a whole.

Good things happen when work places work. You'll receive both strategic and pragmatic guidance about how to improve Customer satisfaction & Employee engagement with leaders who lead and a front-line that is inspired. We provide: training, consulting, surveys, diagnostic tools and keynotes. The electric utility industry is a market segment we specialize in. Both large and small utilities have received actionable insights. For eighteen years we have been talking to 1000's of utility customers in Ontario and across Canada and we have expertise that is beneficial to every utility.

Culture, Leadership & Performance – Organizational Development	**Focus Groups, Surveys, Polls, Diagnostics**	**Customer Service Excellence**
Leadership development	Diagnostics ie. Change Readiness, Leadership Effectiveness, Managerial Competencies	Service Excellence Leadership
Strategic Planning	Surveys & Polls	Telephone Skills
Teambuilding	Customer Satisfaction and Loyalty Benchmarking Surveys	Customer Care
Organizational Culture Transformation	Organization Culture Surveys	Dealing with Difficult Customers

Benefit from our expertise in Customer Satisfaction, Leadership development, Strategy development or review, and Front-line & Top-line driven-change. We're experts in helping you assess and then transform your organization's culture to one where achieving goals while creating higher levels of customer satisfaction is important. Anyone can present data, or design programs – we believe having an understanding of the industry before doing so is crucial. Call us when creating an organization where more employees satisfy more customers more often, is important.

Your personal contact is:

Sid Ridgley, CSP

Phone: (905) 895-7900 Fax: (905) 895-7970 E-mail: sidridgley@utilitypulse.com or sridgley@simulcorp.com

Appendix A-2 – 2019 Customer Survey

2019 Customer Satisfaction Survey Final Report

For Tillsonburg Hydro

By Redhead Media Solutions Inc.

April 15, 2019

Introduction and Summary

Thank you for selecting Redhead Media Solutions Inc. for this important project for Tillsonburg Hydro. We appreciate your confidence in us to provide you with data on Customer Satisfaction that can now be used to compare with the previous survey in 2017 and among other LDCs.

We have restructured our reporting to you, replacing the traditional single report with tables and transitioning to a more robust and informative graphics based style that gives you the ability to see differences "at a glance" as opposed to simply comparing numbers. To supplement this report, we have also included the full set of 2019 tables, comparative tables and comments for question G13 (open comments) in spreadsheet format, allowing you easy access to the data we have generated. You can find this as part of the email we sent labelled "Appendix A". The methodology guide, as well as residential and general service questionnaires are also included as appendices B, C and D for your reference.

Should there be any specific data or breakouts that you require, please contact us to discuss.

Graydon Smith
President

TILLSONBURG HYDRO INC.

REDHEAD MEDIA SOLUTIONS INC.

Introduction and Summary

Redhead Media Solutions Inc. (Redhead), partnering with ADVANIS for data collection and reporting, has been retained (via an RFP process by Cornerstone Hydro Electric Concepts Inc. - CHEC) to conduct a 2019 Customer Satisfaction Survey for Tillsonburg Hydro. This survey is a required part of an LDC's Balanced Scorecard and other reporting and regulatory requirements for the Ontario Energy Board (OEB).

The complete group of participating CHEC LDCs are as follows:

- Centre Wellington Hydro
- EPCOR
- Grimsby Power
- Lakefront Utilities
- Lakeland Power Distribution
- Niagara-on-the-Lake Hydro
- Orangeville Hydro
- Ottawa River Power Corp
- Renfrew Hydro
- Rideau St. Lawrence Distribution
- Tillsonburg Hydro
- Wasaga Distribution
- Wellington North Power

Additionally, Redhead also provided services for this project outside the CHEC group of LDCs.

Introduction and Summary

<u>This final report contains data specifically for Tillsonburg Hydro.</u>

The survey is comprised of 301 randomly selected interviews of Tillsonburg Hydro customers among the low volume customer base (residential customers and general service under 50kW customers; GS<50kW). Residential customers were asked to confirm that they receive an electricity or hydro bill from Tillsonburg Hydro and that they are the primary payer of that bill, or share the responsibility.

GS<50kW customers were also asked to confirm they receive an electricity or hydro bill from Tillsonburg Hydro, and additionally to confirm that the person who manages the organization's electricity bill was the one to complete the interview. The sample frame is stratified on region (where applicable) and consumption quartiles by rate class in accordance with the "Survey Implementation Requirements" on page 4 of the "EDA/Innovative Customer Satisfaction Scorecard: Methodology & Survey Implementation Guide" which is contained in Appendix B of this report.

The objective of the survey is to provide an Overall Customer Satisfaction index score for Tillsonburg Hydro. This is a calculated aggregate value based on responses of to 9 core measures in the survey instrument. In some cases, additional questions were asked but not included in the calculation of the Customer Satisfaction Index Score.

Tillsonburg Hydro's 2019 Customer Satisfaction Index Score is 78.6%, This is a 0.8% less than the mean average of all surveyed LDCs (79.4%).

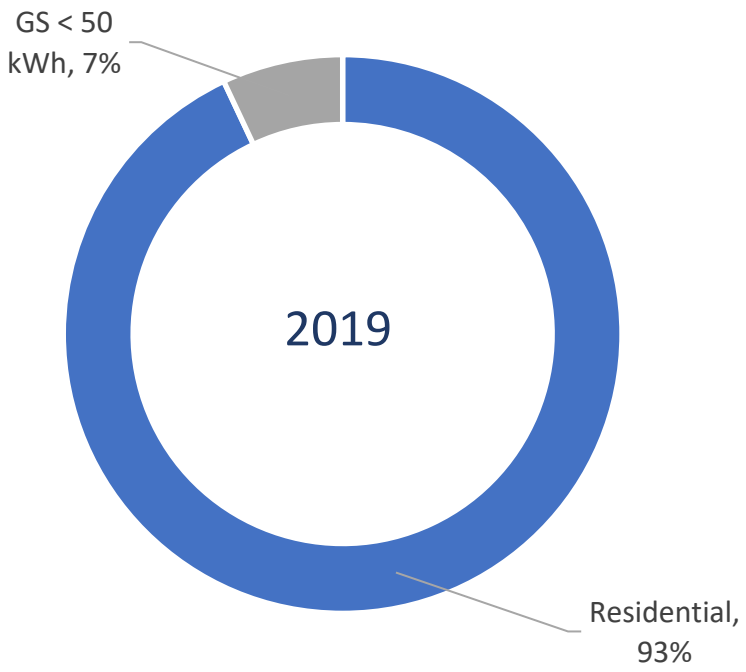
This falls within a very tight spectrum of index scores we processed for all LDCs that participated in the 2019 survey via Redhead. When the confidence interval and margin of error is applied to all index scores, there is significant overlap between LDCs which underlines the statistical similarity of performance and satisfaction among participants. Statistically, Tillsonburg Hydro is similar to all other LDCs surveyed.

The following report contains graphic data and tables for all prescribed questions and comparative scoring data (external). Additional data is available in the attached spreadsheet sheets and tables. (Appendix A)

Question scoring and index methodologies were prescribed by the EDA/Innovative. As such, there has been limited additional analysis provided beyond the direction provided to meet the reporting guidelines. Should you wish further analysis of the data please contact our office to discuss.

REDHEAD MEDIA SOLUTIONS INC

Customer Type: Low Volume Rate Class



	Total	Residential	General service business GS<50kWh
Base: Total answering	301	277	24
Residential	93%	100%	0%
General service business GS<50kWh	7%	0%	100%

*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 10-February 16, 2019, n=301, accurate 5.5 percentage points plus or minus, 19 times out of 20.

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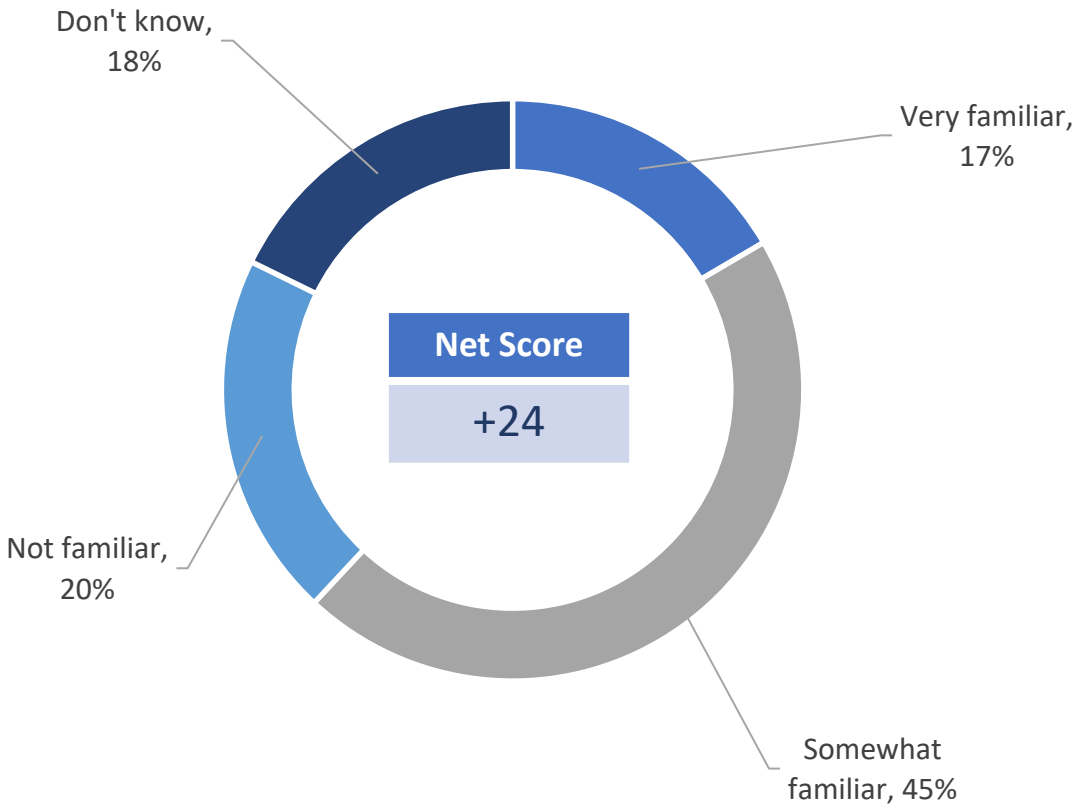
B4: How familiar are you with Tillsonburg Hydro, which operates the electricity distribution system in your community?



	Total	Residential	General service business GS<50kWh
Base: Total answering	301	277	24
Very familiar	17%	16%	21%
Somewhat familiar	45%	45%	54%
Not familiar	20%	21%	17%
Don't know	18%	18%	8%
Refused	0%	0%	0%

*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 10-February 16, 2019, n=301, accurate 5.5 percentage points plus or minus, 19 times out of 20.

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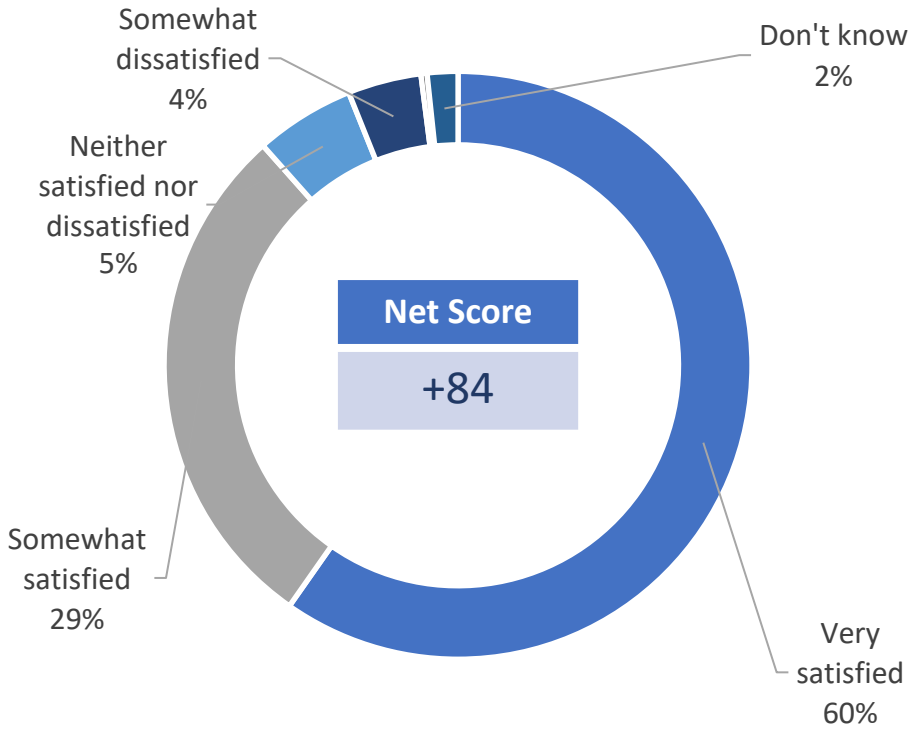
B5: Thinking specifically about the services provided to you and your community by Tillsonburg Hydro, overall, how satisfied are you with the services that you receive from Tillsonburg Hydro?



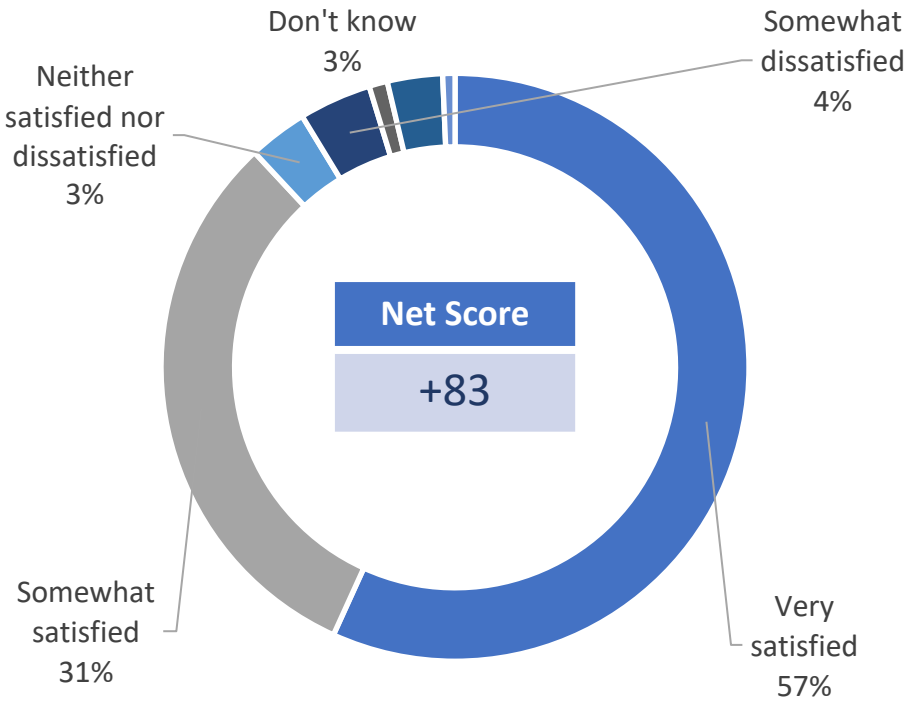
	Total	Residential	General service business GS<50kWh
Base: Total Answering	301	277	24
Very satisfied	60%	61%	42%
Somewhat satisfied	29%	28%	42%
Neither satisfied nor dissatisfied	5%	5%	17%
Somewhat dissatisfied	4%	4%	0%
Very dissatisfied	0%	0%	0%
Don't know	2%	2%	0%
Refused	0%	0%	0%

*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 10-February 16, 2019, n=301, accurate 5.5 percentage points plus or minus, 19 times out of 20.

REDHEAD MEDIA SOLUTIONS INC

C6: Satisfaction with the reliability of your electricity service – as judged by the number of outages you experience.



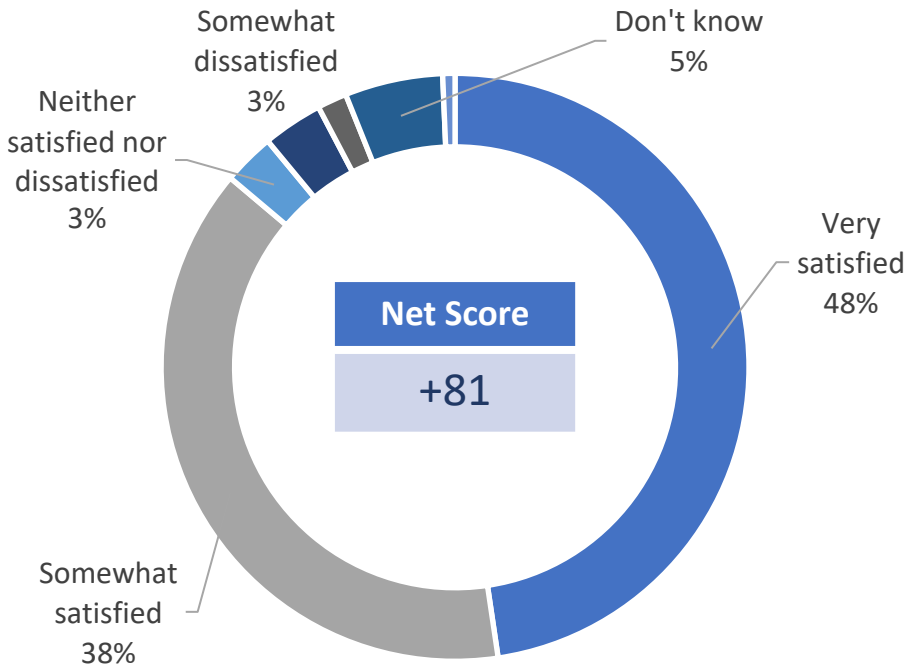
	Total	Residential	General service business GS<50kWh
Base: Total Answering	301	277	24
Very satisfied	57%	57%	58%
Somewhat satisfied	31%	31%	29%
Neither satisfied nor dissatisfied	3%	3%	8%
Somewhat dissatisfied	4%	4%	4%
Very dissatisfied	1%	1%	0%
Don't know	3%	3%	0%
Refused	1%	1%	0%

*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 10-February 16, 2019, n=301, accurate 5.5 percentage points plus or minus, 19 times out of 20.

REDHEAD MEDIA SOLUTIONS INC

C7: Satisfaction with the amount of time it takes when outages occur.



	Total	Residential	General service business GS<50kWh
Base: Total Answering	301	277	24
Very satisfied	48%	48%	38%
Somewhat satisfied	38%	38%	42%
Neither satisfied nor dissatisfied	3%	2%	13%
Somewhat dissatisfied	3%	3%	4%
Very dissatisfied	2%	1%	4%
Don't know	5%	6%	0%
Refused	1%	1%	0%

*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 10-February 16, 2019, n=301, accurate 5.5 percentage points plus or minus, 19 times out of 20.

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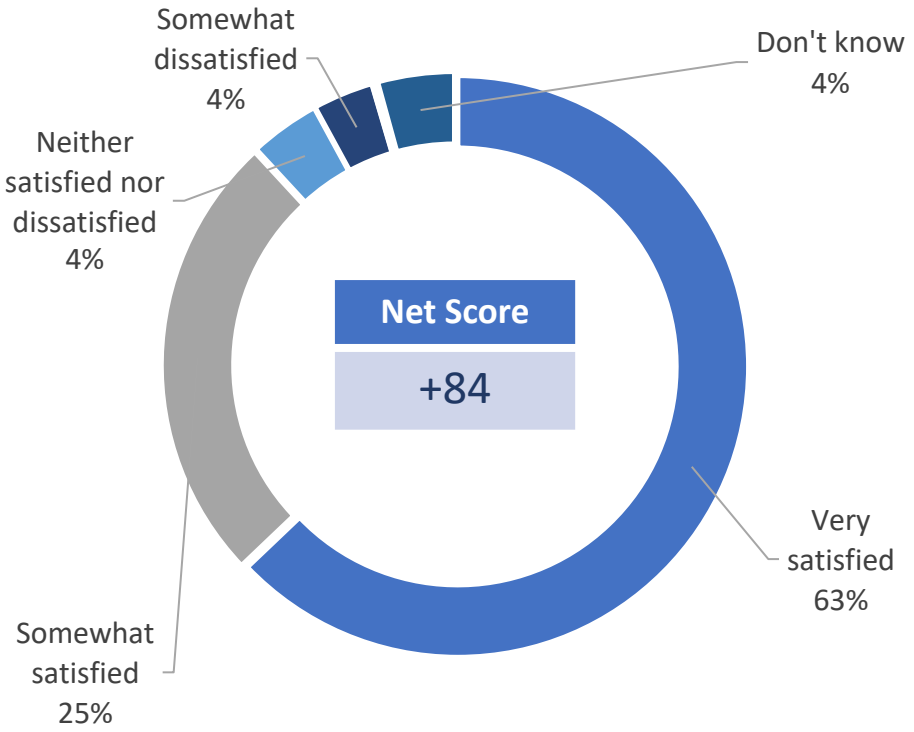
C8: Satisfaction with the quality of power delivered to you as judged by the absence of voltage fluctuations that can result in the flickering or diming of lights or may affect your equipment.



	Total	Residential	General service business GS<50kWh
Base: Total Answering	301	277	24
Very satisfied	63%	62%	71%
Somewhat satisfied	25%	26%	8%
Neither satisfied nor dissatisfied	4%	4%	8%
Somewhat dissatisfied	3%	4%	0%
Very dissatisfied	0%	0%	4%
Don't know	4%	4%	8%
Refused	0%	0%	0%

*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 10-February 16, 2019, n=301, accurate 5.5 percentage points plus or minus, 19 times out of 20.

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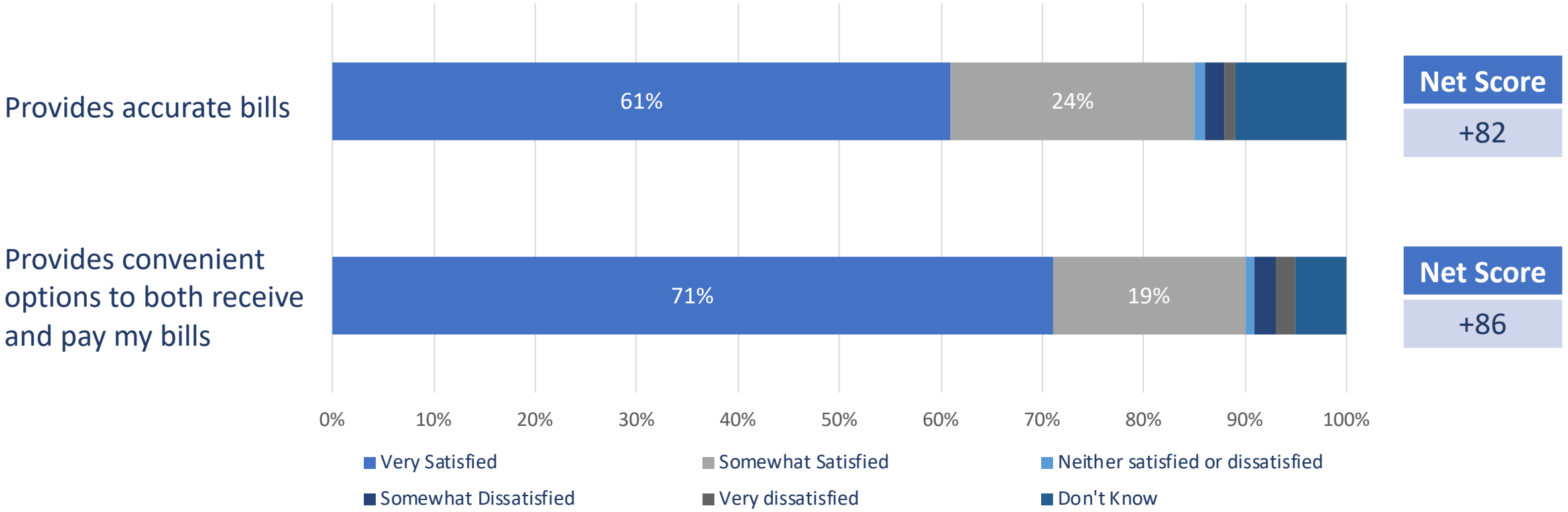
D9/D10: For each of the following statements about the bills that you receive from Tillsonburg Hydro, please tell me how satisfied you are…



*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 10-February 16, 2019, n=301, accurate 5.5 percentage points plus or minus, 19 times out of 20.

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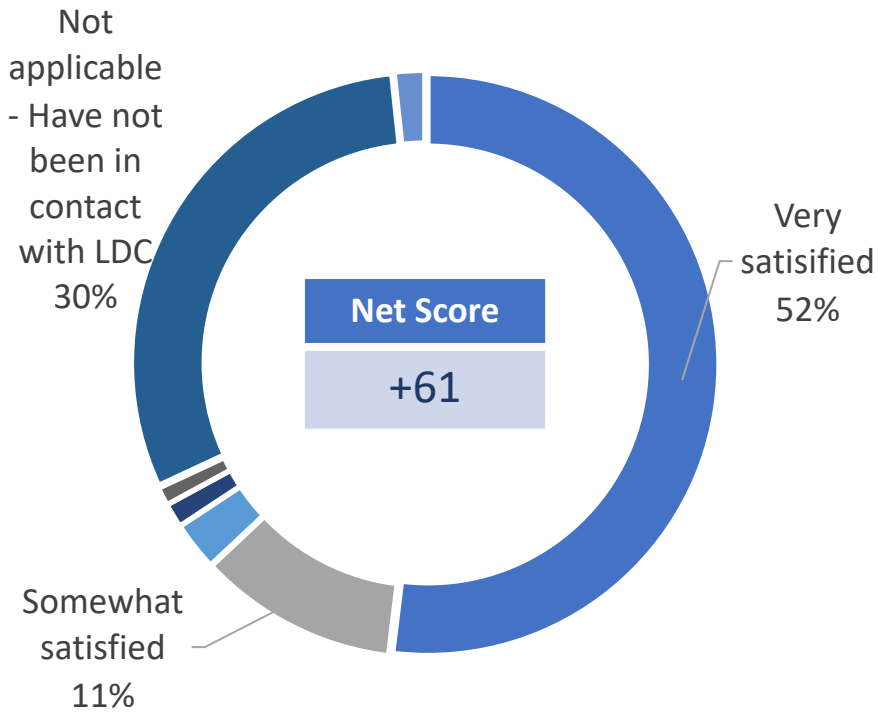
E11: Overall, how satisfied are you with the customer service provided by Tillsonburg Hydro?



	Total	Residential	General service business GS<50kWh
Base: Total Answering	301	277	24
Very satisfied	52%	53%	33%
Somewhat satisfied	11%	10%	29%
Neither satisfied nor dissatisfied	3%	3%	0%
Somewhat dissatisfied	1%	1%	0%
Very dissatisfied	1%	1%	0%
Not applicable - Have not been in contact with LDC	30%	30%	38%
Don't know	2%	2%	0%

*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 10-February 16, 2019, n=301, accurate 5.5 percentage points plus or minus, 19 times out of 20.

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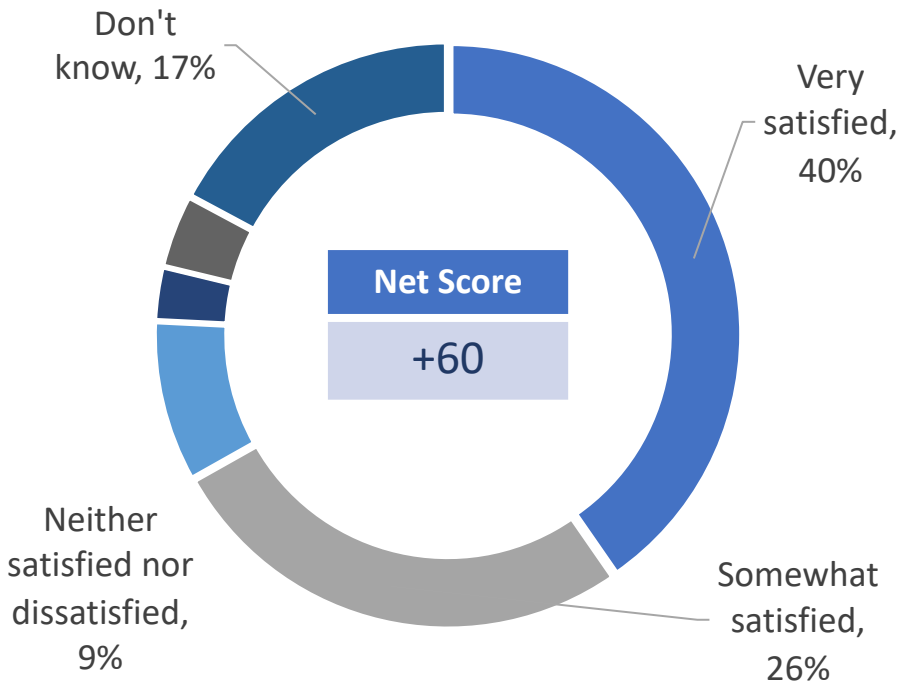
F12: Overall, how satisfied are you with the communications that you receive from Tillsonburg Hydro related specifically to your electrical service?



	Total	Residential	General service business GS<50kWh
Base: Total Answering	301	277	24
Very satisfied	40%	40%	38%
Somewhat satisfied	26%	26%	38%
Neither satisfied nor dissatisfied	9%	9%	13%
Somewhat dissatisfied	3%	3%	4%
Very dissatisfied	4%	4%	0%
Don't know	17%	18%	4%
Refused	0%	0%	4%

*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 10-February 16, 2019, n=301, accurate 5.5 percentage points plus or minus, 19 times out of 20.

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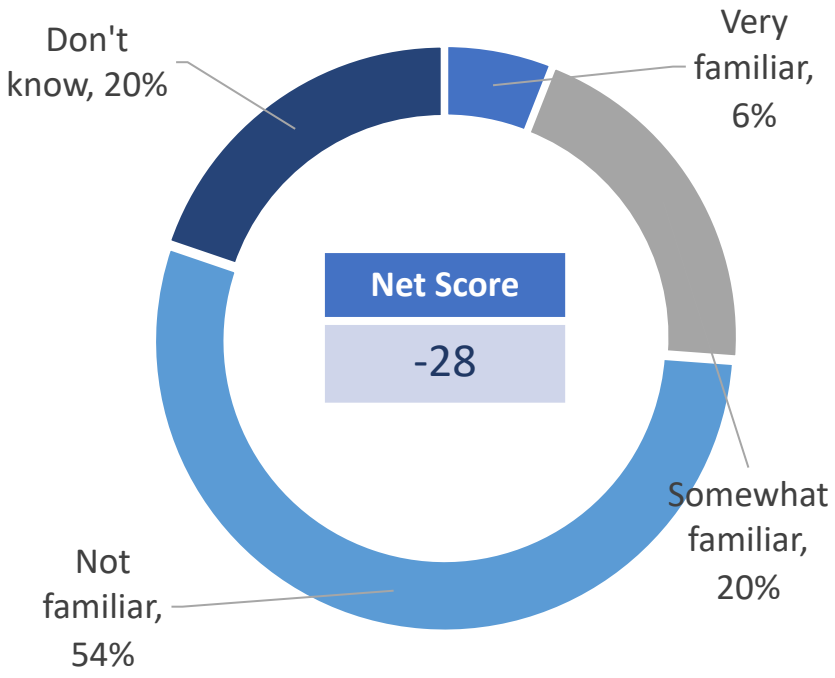
G13: Before this survey, how familiar with you with the percentage of your (household/organization)'s electricity bill that went to Tillsonburg Hydro?

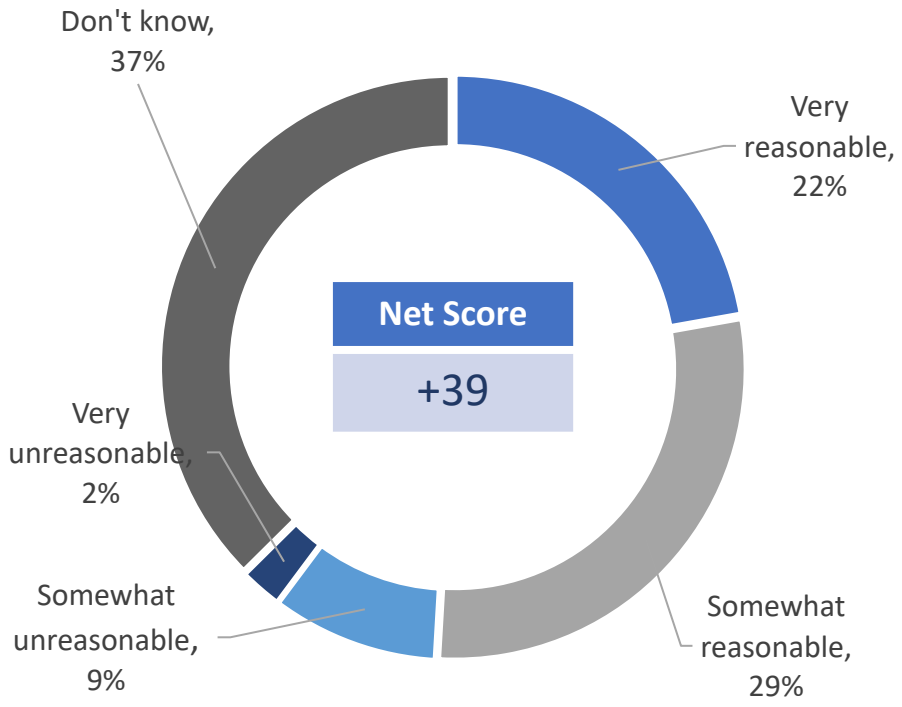


	Total	Residential	General service business GS<50kWh
Base: Total Answering	301	277	24
Very familiar	6%	6%	8%
Somewhat familiar	20%	19%	29%
Not familiar	54%	54%	50%
Don't know	20%	20%	13%

*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 10-February 16, 2019, n=301, accurate 5.5 percentage points plus or minus, 19 times out of 20.

G14: Do you feel that the percentage of your (household/organizations)'s total electricity bill that you pay to Tillsonburg Hydro for the services they provide is…?

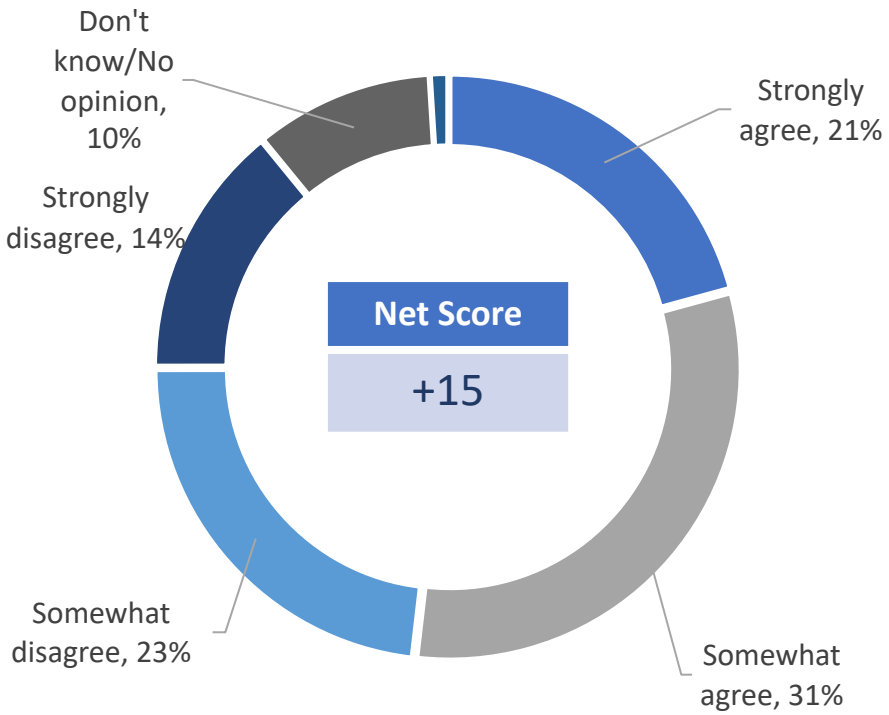


	Total	Residential	General service business GS<50kWh
Base: Total Answering	301	277	24
Very reasonable	22%	23%	8%
Somewhat reasonable	29%	29%	25%
Somewhat unreasonable	9%	9%	13%
Very unreasonable	2%	3%	0%
Don't know	37%	36%	54%
Refused	0%	0%	0%

*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 10-February 16, 2019, n=301, accurate 5.5 percentage points plus or minus, 19 times out of 20.

H16: The cost of my electricity bill has a major impact on (my finances and requires I do without some other important priorities)/(on the bottom line of my organization and results in some important spending priorities and investments being put off.



	Total	Residential	General service business GS<50kWh
Base: Total Answering	301	277	24
Strongly agree	21%	20%	33%
Somewhat agree	31%	30%	42%
Somewhat disagree	23%	24%	8%
Strongly disagree	14%	15%	4%
Don't know/No opinion	10%	10%	13%
Refused	1%	1%	0%

*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 10-February 16, 2019, n=301, accurate 5.5 percentage points plus or minus, 19 times out of 20.

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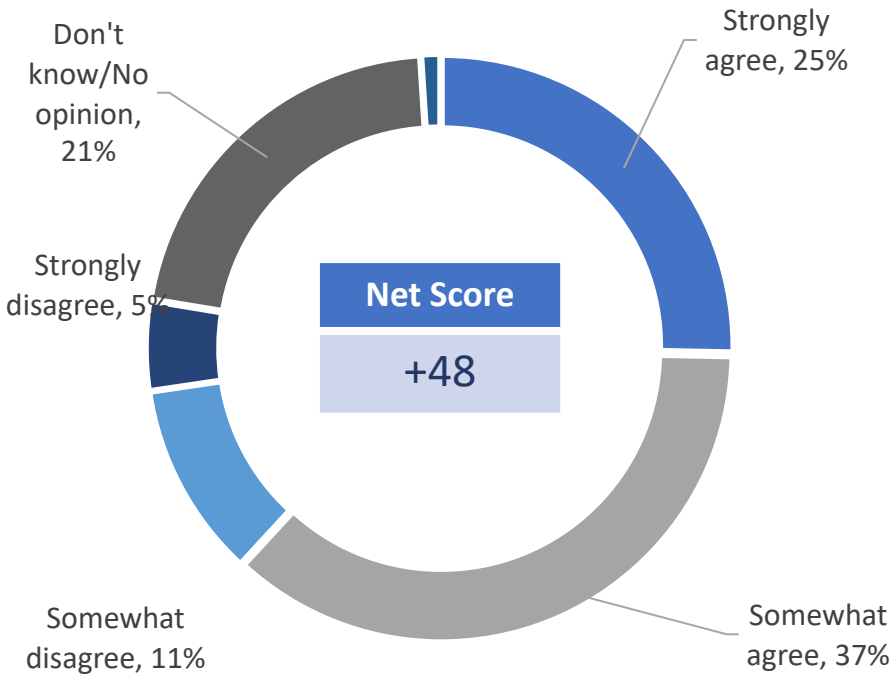
H17: Customers are well served by the electricity system in Ontario.

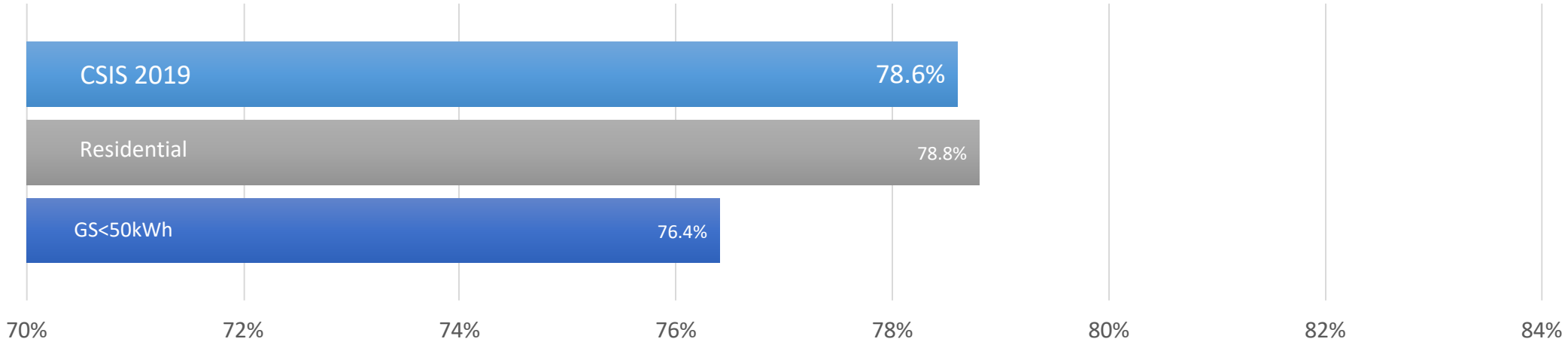


	Total	Residential	General service business GS<50kWh
Base: Total Answering	301	277	24
Strongly agree	25%	26%	21%
Somewhat agree	37%	36%	38%
Somewhat disagree	11%	10%	21%
Strongly disagree	5%	5%	8%
Don't know/No opinion	21%	22%	13%
Refused	1%	1%	0%

*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 10-February 16, 2019, n=301, accurate 5.5 percentage points plus or minus, 19 times out of 20.

Customer Satisfaction Index Score



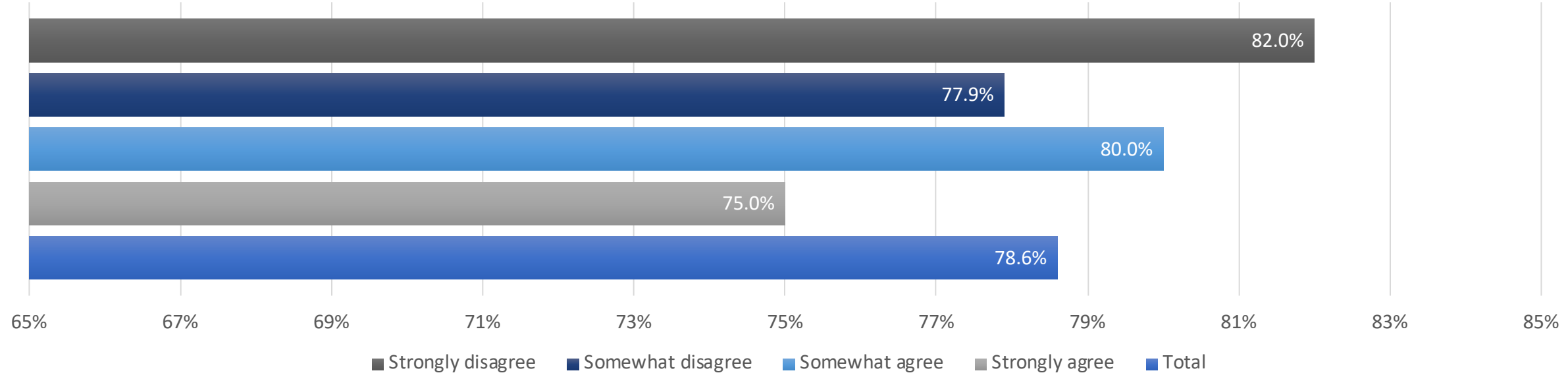
	Total	Residential	General service business GS<50kWh
Base: Total Answering	301	277	24
Customer Satisfaction index score	78.6%	78.8%	76.4%

*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 10-February 16, 2019, n=301, accurate 5.5 percentage points plus or minus, 19 times out of 20.

REDHEAD INC MEDIA SOLUTIONS

Customer Satisfaction Index Score by reply to question H16 (Electricity bill impact on finances)



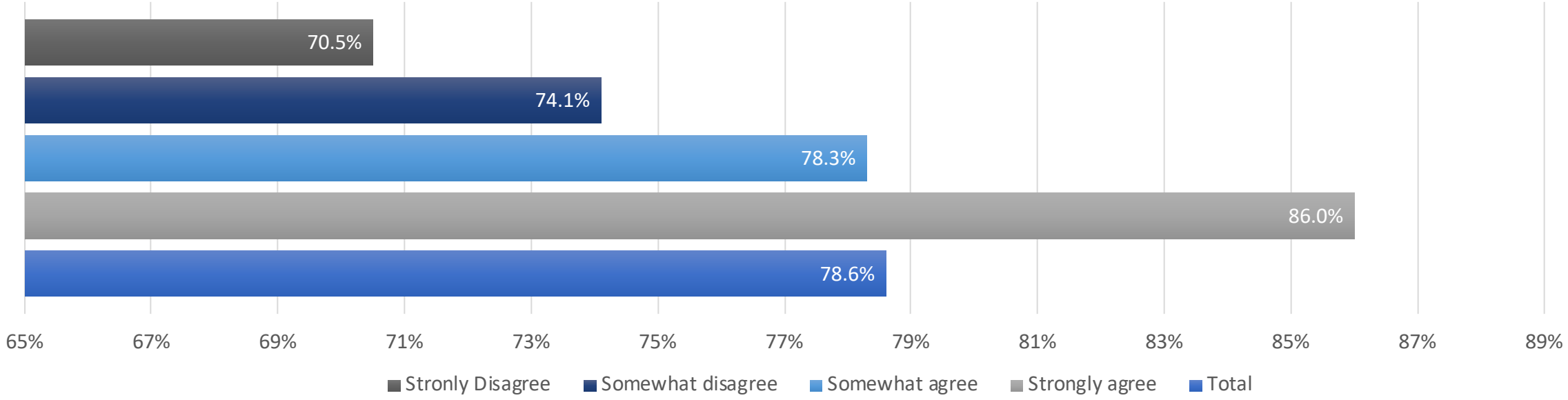
	Total	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree
Base: Total Answering	301	63	94	69	42
Customer Satisfaction index score	78.6%	75.0%	80.0%	77.9%	82.0%

*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 10-February 16, 2019, n=301, accurate 5.5 percentage points plus or minus, 19 times out of 20.

REDHEAD INC MEDIA SOLUTIONS

Customer Satisfaction Index Score by reply to question H17 (Well served by electricity system)



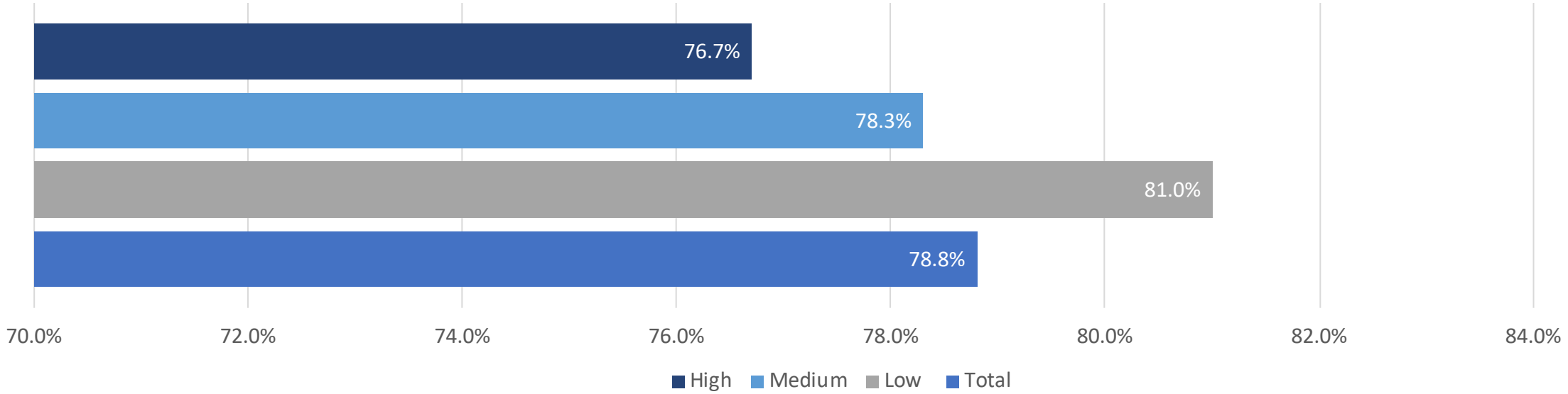
	Total	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree
Base: Total Answering	301	76	110	33	15
Customer Satisfaction index score	78.6%	86.0%	78.3%	74.1%	70.5%

*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 10-February 16, 2019, n=301, accurate 5.5 percentage points plus or minus, 19 times out of 20.

REDHEAD MEDIA SOLUTIONS INC

Customer Satisfaction Index Score by consumption tranches (residential)



	Total	Low consumption	Medium consumption	High consumption
Base: Residential customers	277	95	99	83
Customer Satisfaction index score	78.8%	81.0%	78.3%	76.7%

*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 10-February 16, 2019, n=277.

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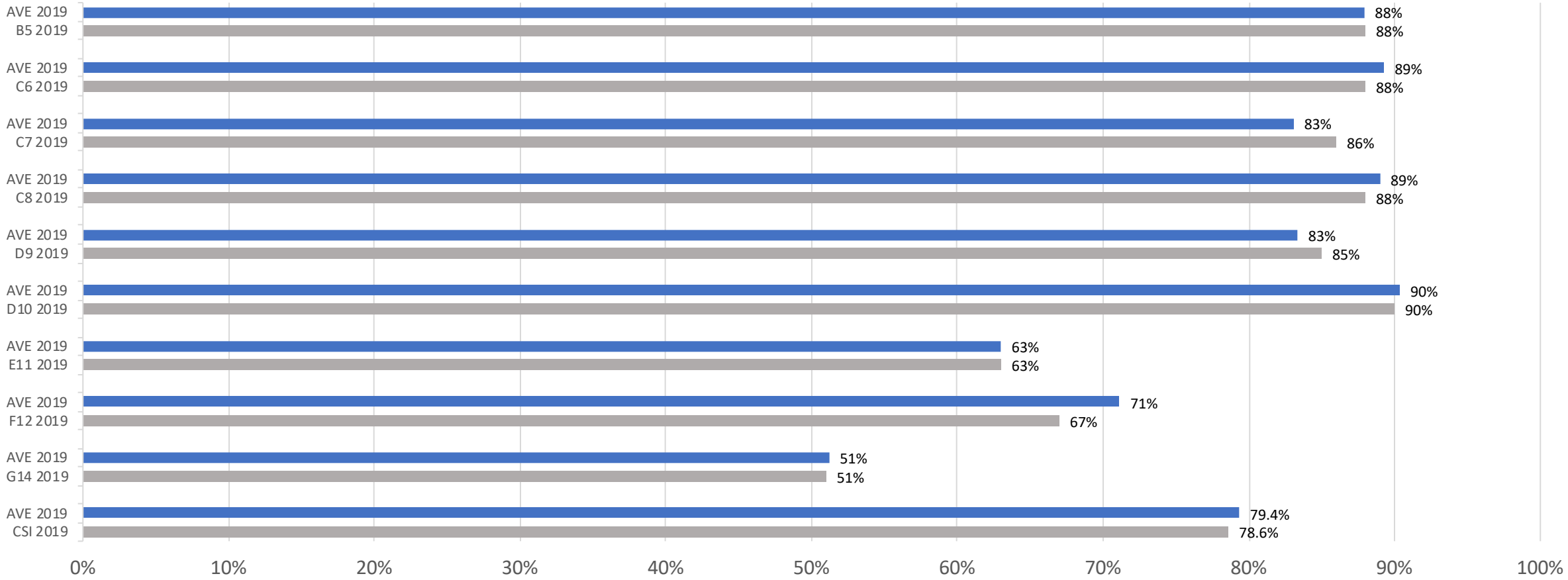
Comparative Data – Core CSI Questions Participant Ave/Tillsonburg Hydro Net Satisfied Response



*Note: Charts and tables may not add up to 100% due to rounding

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 10-February 16, 2019, n=301, accurate 5.5 percentage points plus or minus, 19 times out of 20.

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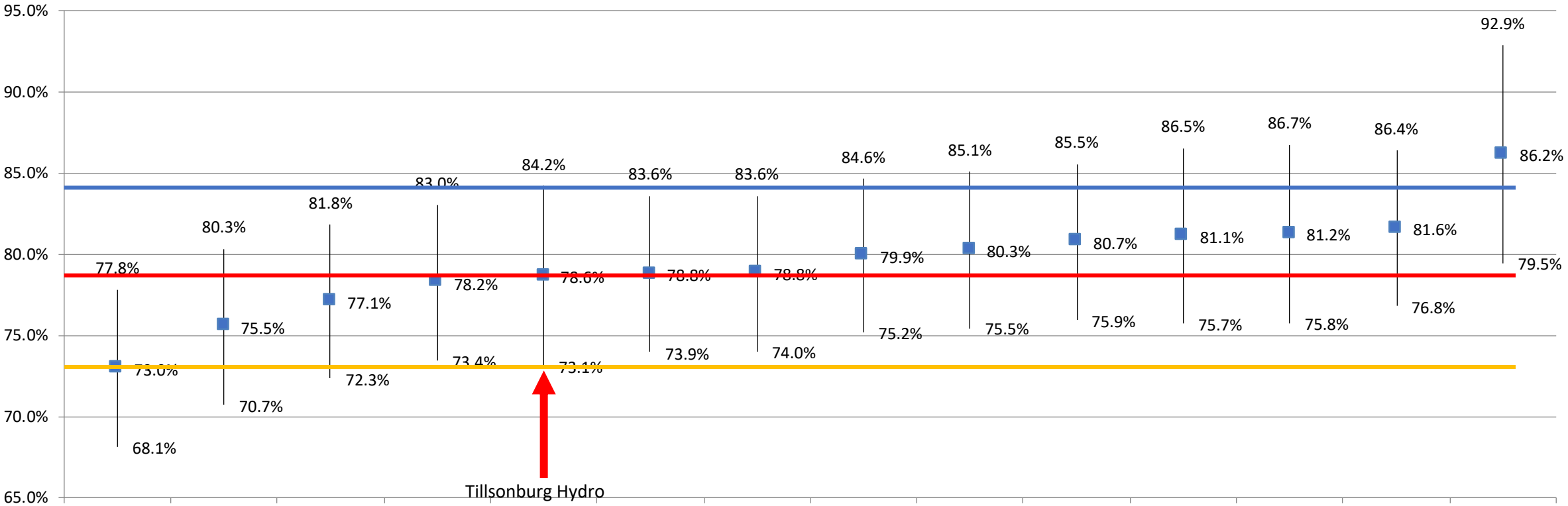
Customer Satisfaction Index Score Comparison
Upper and Lower Bound



- The lines denote Tillsonburg Hydro's upper and lower bound based on the CSI Score.
- Almost all LDCs confidence intervals overlap, similar to 2017.
- Tillsonburg Hydro overlaps with all LDC's, which indicates a statistical similarity.

Source: Redhead Media Solutions/Advanis telephone random customer survey, January 10-February 16, 2019, n=301, accurate 5.5 percentage points plus or minus, 19 times out of 20.

REDHEAD MEDIA SOLUTIONS INC

Methodology Summary

Commissioned by	Tillsonburg Hydro.
Sample size	301 randomly selected customers
Margin of error	±5.5 percentage points, 19 times out of 20
Survey mode	Random telephone survey of customer base, CATI data collection
Survey sample	Residential and GS <50kWh customer lists provided by Tillsonburg Hydro
Time of calling	4PM-9PM Weekdays, 10AM-5PM Saturdays, scheduled callbacks
In-field dates	Jan 10-February 16, 2019
Language	English only
Survey author	Innovative Research/Electricity Distributors Association
Question Order	Report shown in order
Question Wording	Questions shown in report exactly as asked
Survey Company	Redhead Media Solutions Inc/Advanis

Methodology Details

Target Respondents

The respondents of the survey were Ontario residents who are the primary bill payer or share the responsibility if residential or the person in-charge of managing the electricity bill at the organization if general service, and who resided within one of Tillsonburg Hydro's service territory(ies). Service territories were determined based on customer lists provided by Tillsonburg Hydro.

Sample Size and Statistical Reliability

The final total completed surveys by LDC, and the associated margin of error for each, are shown below.

All margins of error are shown at a 95% confidence level.

- E.g., the margin of error associated with a sample size of 400 for a large (infinite) population is ±4.9 percentage points, 19 times out of 20.

Since Tillsonburg Hydro has a finite population, we used the specific population sizes (i.e., the number of samples records received from Tillsonburg Hydro) in the calculation of margin of error. Doing so is more accurate, and results in a narrower margin of error than if we simply assumed large (infinite) population for each.

Sample sizes were set according to the *LDC Customer Satisfaction Survey: Methodology & Survey Implementation Guide*, prepared for the Electrical Distributors Association (April 19, 2016 revision):

Where possible, sample size of n=400.
Distributors with 3000 to 4999 customers (residential + GS<50), n=300
Distributors with <3000 customers (residential + GS<50), n=200

REDHEAD MEDIA SOLUTIONS INC

Methodology Details

Sampling Methodology

Redhead was provided sample lists from Tillsonburg Hydro. Customer lists included all basic information required such as name, telephone number, region (where applicable), customer type (residential or GS<50), LDC fee, Annual or Monthly consumption values. Redhead then calculated which quartile group each resident belonged to by evenly dividing them into four groups within each region and customer type. These quartiles were calculated based on annual consumption value.

To minimize low response:

- Sample was loaded in batches to ensure the sample was fully utilized before moving onto fresh sample records;
- Calls were made between the hours of 4pm and 9pm ET; and
- Call backs were scheduled and honored between the hours of 9am and 9pm ET.

Sample Cleaning

Redhead cleaned the customer lists individually once received from each LDC to ensure the customer list counts reflected actual individual records that could be called. The following steps were taken during sample cleaning.

- All records with no phone numbers were removed.
- All phone numbers were checked to see if they were valid numbers (i.e. 10 digits, all numerical, etc.) and any bad cases were removed.
- When duplicates were detected based on phone number, the average of the consumption value was calculated and kept for one consolidated record. All others were removed.
- Residential and GS<50KW were separated into their own lists to be loaded and managed separately in the calling system.

Regions within each customer list were given a numerical value to be used for calling quotas.

Methodology Details

Questionnaire

The survey instrument was provided by the Electricity Distributors Association (EDA) developed in conjunction with Innovative Research. The survey consisted of an introduction, overall satisfaction, power quality and reliability, billing and payment, customer service experience, communications, price, optional deeper dive questions, and final personal finance / sector mood measures. Additional questions were provided individually by Tillsonburg Hydro. These questions are not required as part of the survey and, as outlined in the methodology guideline, were asked after all the standard and required questions.

Data Collection

Computer aided telephone interviews (CATI) were conducted from January 10-February 16, 2019.

Quality Control

- Advanis, on behalf of Redhead, trained the interviewers to understand the study's objectives;
- Detailed call records are kept by the automated CATI system, and are supplemented by output files to SPSS for productivity analysis (i.e., not subject to human error);
- The survey was soft launched in LDCs that had the most available sample, and the data was then checked before calling began in full for Tillsonburg Hydro;
- 100% of all surveys are digitally recorded for potential review (see next bullet);
- Advanis' Quality Assurance team listened to the actual recordings of five percent of completed surveys and compared the responses to those entered by the interviewer to ensure that responses from respondents are properly recorded;
- Team Supervisors conduct regular more formal evaluations with each interviewer, in addition to nightly monitoring of each interviewer on their team;
- Project Managers closely monitored the progress of data collection, including call record dispositions;
- All SPSS code is reviewed by a more senior researcher;
- All Report Builder output is reviewed by a more senior researcher; and
- All values in the report are reviewed by another team member to ensure accuracy.

Methodology Details

Analysis of Findings & Data Weighting

Results were weighted to match the proportion of low volume rate class records as provided to Redhead after cleaning of the sample file. Where a region flag was also provided, results were weighted to the low volume rate class within each region and regions were weighted proportionately to one another based on the customer base as provided in the cleaned sample file.

The Customer Satisfaction index scores have been highlighted and were calculated as described below, based on instructions in the Survey Methodology Guidelines. The "response values" referenced in the description below were also determined and provided by the survey authors.

Data analysis and cross-tabulation have been conducted using SPSS and Report Builder software.

This **index score** is calculated using the following process:

Step 1: Weight data to n=400 with each low volume rate class proportionate to its share of LDC customer base.

Step 2: Rescale the index score variables onto the 0 to 1 scale as indicated by the response values detailed below.

Step 3: The average result of the questions asked for each OEB topic and the overall satisfaction score will be added together[3].

	B5
+	**[C6+C7+C8]** divided by 3
+	**[D9+D10]** divided by 2
+	**E11**
+	**F12**
+	**G14**
=	**Total cumulative scores**

Step 4: The total cumulative score from Step 2 will be divided by 6 to generate the **Customer Satisfaction Index Score** (bound between 0-1).

The chart on the following page illustrates how the **Customer Satisfaction Index Score** will be calculated.

As noted above, LDCs without a region flag were weighted to their low volume rate class proportion based on the cleaned sample file. LDCs with a region flag were weighted to their low volume rate class proportion within each region based on the cleaned sample file, and then regions were weighted proportionately to one another based on the customer base as provided in the cleaned sample file.

Specific values of the number of sample records, estimated population proportions, and final weighted sample counts within Tillsonburg Hydroare provided below. The sum of the regional population proportions within an LDC may not equal 100% due to rounding.

Methodology Tables

Margin of error

LDC	Customer Records from LDC	Completed Surveys	Sample Size as % of Customer list	Margin of Error @ 95% confidence level
Tillsonburg Hydro	6421	301	4.69%	+/- 5.5%

Sample Weighting

Tillsonburg Hydro						
Regions Flagged in Sample	Low Volume Rate Class	Sample Received	Rate Class Proportion	Estimated Population Proportion	Weighted Sample Count	Unweighted Sample Count
TOTAL	Residential	5,935	93%	100%	281	277
	General Service < 50 kW	422	7%		20	24
					301	301

Thank You

We greatly appreciate working on this important project for Tillsonburg Hydro and hope we have met or exceeded your expectations.

We are happy to present this data to your staff or Board members upon request. If you wish to do so, please contact us for an appointment.

We look forward to working with you on future projects, including the Electricity Safety Awareness Survey later in 2019. Please note if you have any other projects that we may be able to help you with, don't hesitate to be in touch.

Graydon Smith - President
Redhead Media Solution Inc.
505 Hwy 118 W.
Suite 416
Bracebridge, ON
P1L 2G7

TILLSONBURG HYDRO INC.

REDHEAD MEDIA SOLUTIONS INC

Appendix A-3 – 2021 Customer Survey

2021 Tillsonburg Hydro Customer Satisfaction Survey

Introduction and Summary

Thank you for selecting Redhead Media Solutions Inc. for this important project for Tillsonburg Hydro. We appreciate your confidence in us to provide you with data on Customer Satisfaction that provides both a current snapshot and can be used to compare with previous surveys in 2019 and among other LDCs that we work with.

It is our goal to always be improving our deliverables and provide value to our clients. To supplement this report, we have also included a stand-alone section on comparable data and verbatims for question G15 (open comments) in spreadsheet format. The methodology guide, as well as residential and general service questionnaires are also included as appendices B, C and D for your reference.

Should there be any specific data or breakouts that you require we would be happy to provide them. Please contact us to discuss how we can assist you and ensure you are getting the most from this project.

Sincerely,

Graydon Smith
President

TILLSONBURG HYDRO INC.

REDHEAD MEDIA SOLUTIONS INC

Introduction and Summary

Redhead Media Solutions Inc. (Redhead), partnering with ADVANIS for data collection and reporting, has been retained (via an RFP process by Cornerstone Hydro Electric Concepts Inc. - CHEC) to conduct a 2021 Customer Satisfaction Survey for Tillsonburg Hydro. This survey is a required part of an LDC's Balanced Scorecard and other reporting and regulatory requirements for the Ontario Energy Board (OEB).

The complete group of participating CHEC LDCs are as follows:

- Centre Wellington Hydro
- EPCOR
- ERTH Power
- Grimsby Power
- Lakefront Utilities
- Lakeland Power Distribution
- Niagara-on-the-Lake Hydro
- Orangeville Hydro
- Ottawa River Power Corp
- Renfrew Hydro
- Rideau St. Lawrence Distribution
- Tillsonburg Hydro
- Wasaga Distribution
- Wellington North Power

REDHEAD INC
MEDIA SOLUTIONS

Introduction and Summary

This final report contains data specifically for Tillsonburg Hydro.

The survey is comprised of 401 randomly selected interviews of Tillsonburg Hydro customers among the low volume customer base (residential customers and general service under 50kW customers; GS<50kW). Residential customers were asked to confirm that they receive an electricity or hydro bill from Tillsonburg Hydro and that they are the primary payer of that bill or share the responsibility.

GS<50kW customers were also asked to confirm they receive an electricity or hydro bill from Tillsonburg Hydro, and additionally to confirm that the person who manages the organization's electricity bill was the one to complete the interview. The sample frame is stratified on region (where applicable) and consumption quartiles by rate class in accordance with the "Survey Implementation Requirements" on page 4 of the "EDA/Innovative Customer Satisfaction Scorecard: Methodology & Survey Implementation Guide" which is contained in Appendix B of this report.

The objective of the survey is to provide an Overall Customer Satisfaction index score for Tillsonburg Hydro. This is a calculated aggregate value based on responses of to 9 core measures in the survey instrument. In some cases, additional questions were asked but not included in the calculation of the Customer Satisfaction Index Score.

Tillsonburg Hydro's 2021 Customer Satisfaction Index Score is 80%, This is 1% greater than the 2019 score (79%) and 1% higher than the average of all LDCs (79%).

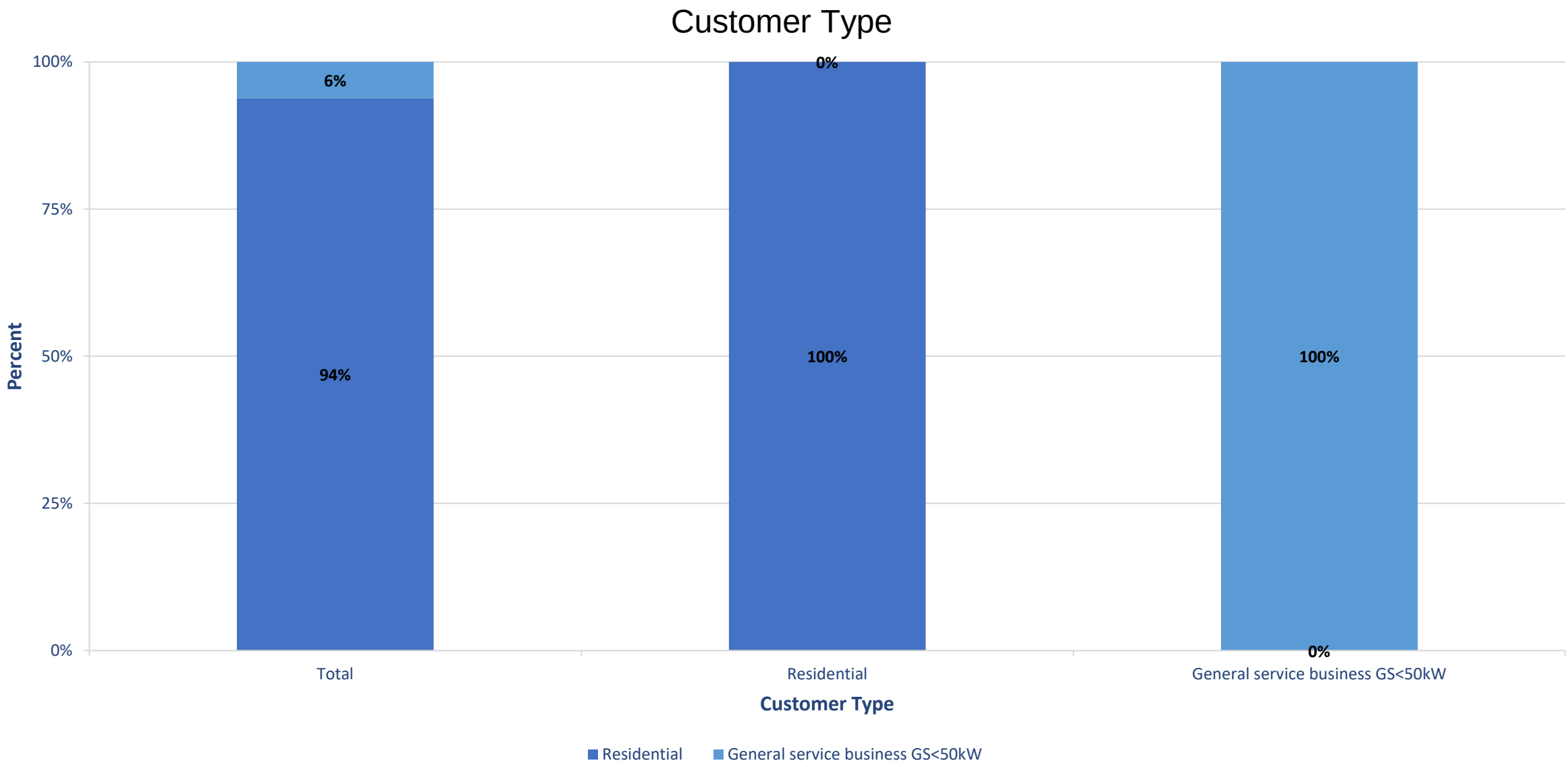
This falls within a very tight spectrum of index scores we processed for all LDCs that participated in the 2019 survey via Redhead. When the confidence interval is applied to all index scores, there is significant overlap between LDCs which underlines the statistical similarity of performance and satisfaction among participants. Statistically, Tillsonburg Hydro is similar to all other LDCs surveyed.

The following report contains graphic data and tables for all core questions as well as any additional questions supplied by the LDC, which were asked after the core questions were completed.

Question scoring and index methodologies were prescribed by the EDA/Innovative. As such, there has been limited additional analysis provided beyond the direction provided to meet the reporting guidelines. Should you wish further analysis of the data please contact our office to discuss.

PARTICIPANT INFORMATION

REDHEAD INC
MEDIA SOLUTIONS



Source: Redhead Media Solutions/Advanis telephone random customer survey, January 11-February 17, 2021, n=401, accurate 4.7 percentage points plus or minus, 19 times out of 20.

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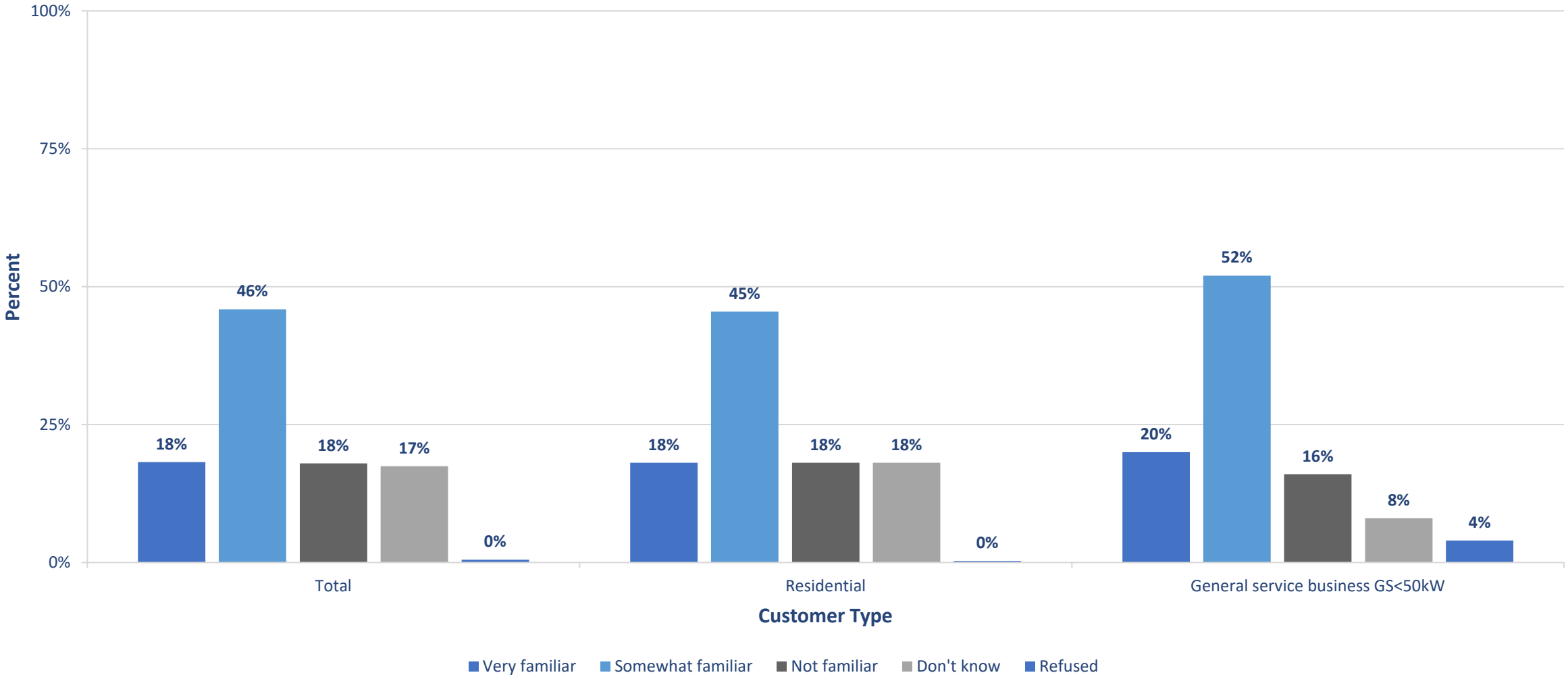
QUESTIONS/DATA

REDHEAD INC
MEDIA SOLUTIONS

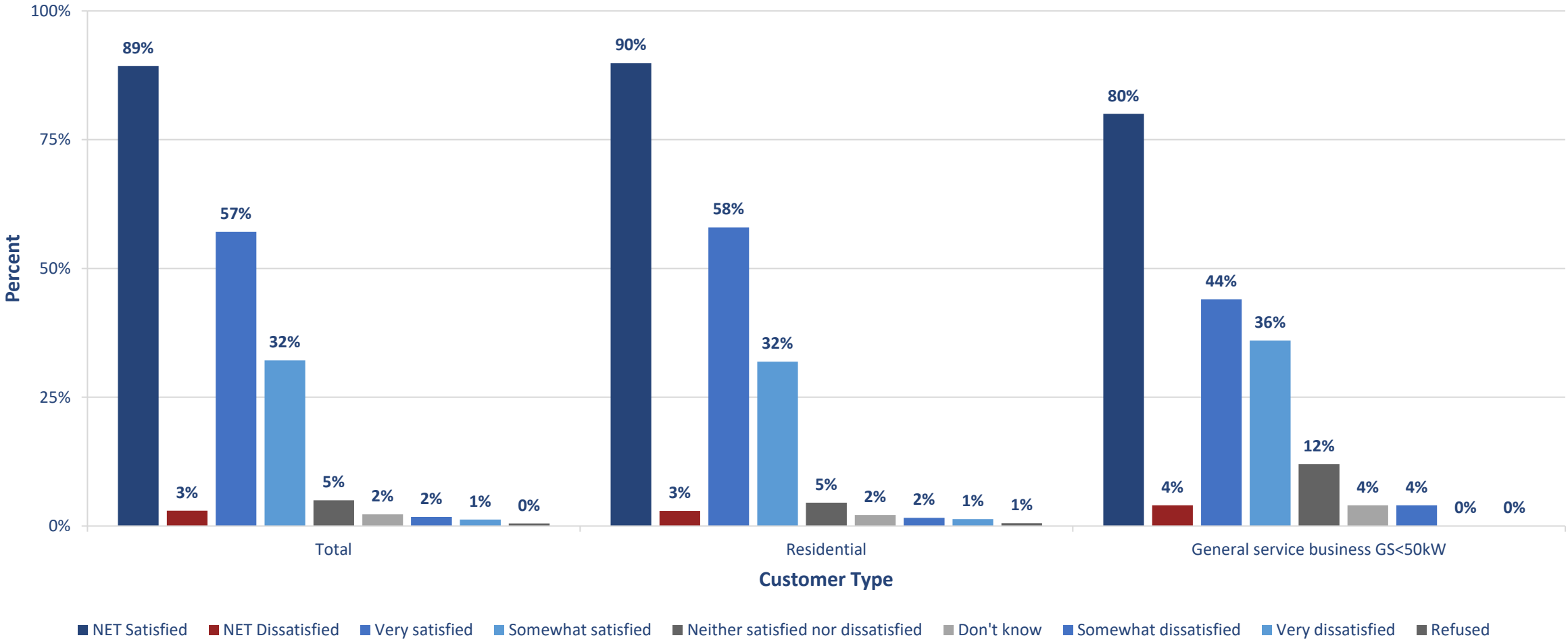
How familiar are you with Tillsonburg Hydro, which operates the electricity distribution system in your community?



Source: Redhead Media Solutions/Advanis telephone random customer survey, January 11-February 17, 2021, n=401, accurate 4.7 percentage points plus or minus, 19 times out of 20.

REDHEAD INC MEDIA SOLUTIONS

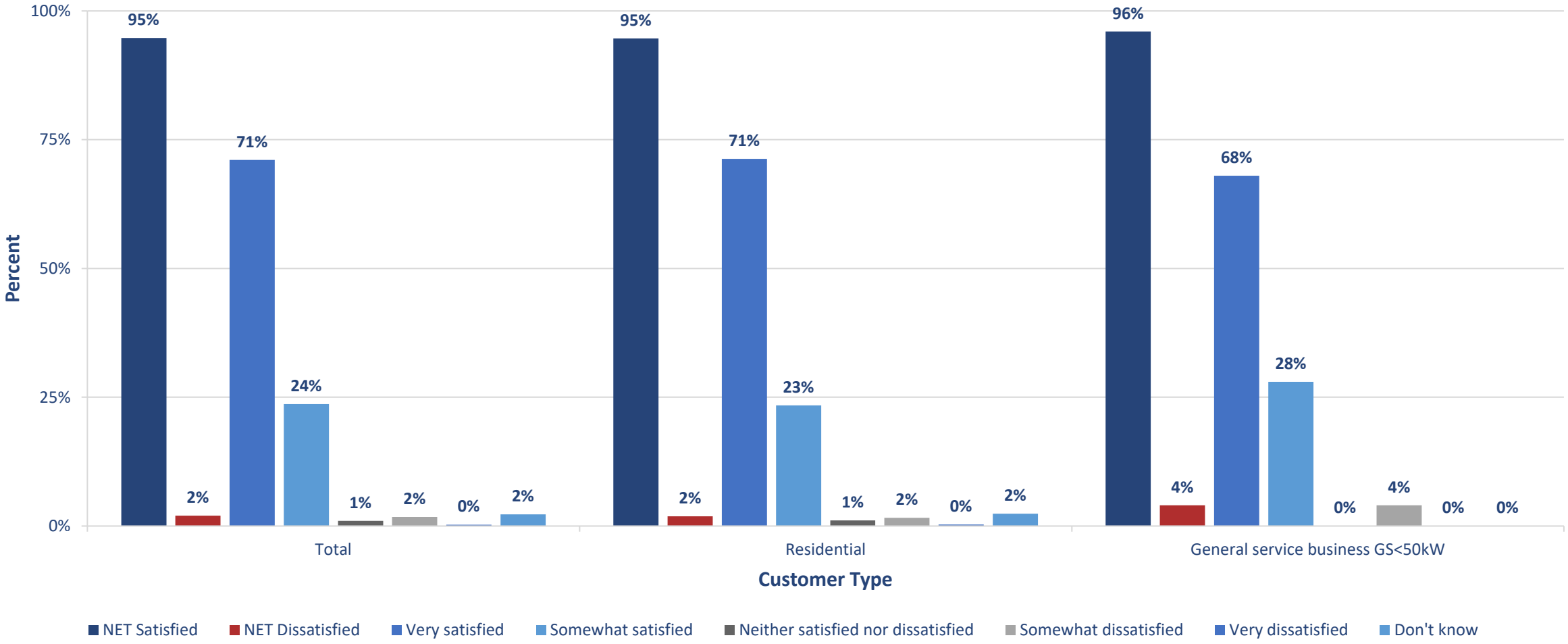
Thinking specifically about the services provided to you and your community by Tillsonburg Hydro, overall, how satisfied are you with the services that you receive from Tillsonburg Hydro?



Source: Redhead Media Solutions/Advanis telephone random customer survey, January 11-February 17, 2021, n=401, accurate 4.7 percentage points plus or minus, 19 times out of 20.

REDHEAD INC MEDIA SOLUTIONS

The reliability of your electricity service – as judged by the number of power outages you experience: How satisfied are you with the electrical service that you receive from Tillsonburg Hydro based on...?



Source: Redhead Media Solutions/Advanis telephone random customer survey, January 11-February 17, 2021, n=401, accurate 4.7 percentage points plus or minus, 19 times out of 20.

REDHEAD INC MEDIA SOLUTIONS

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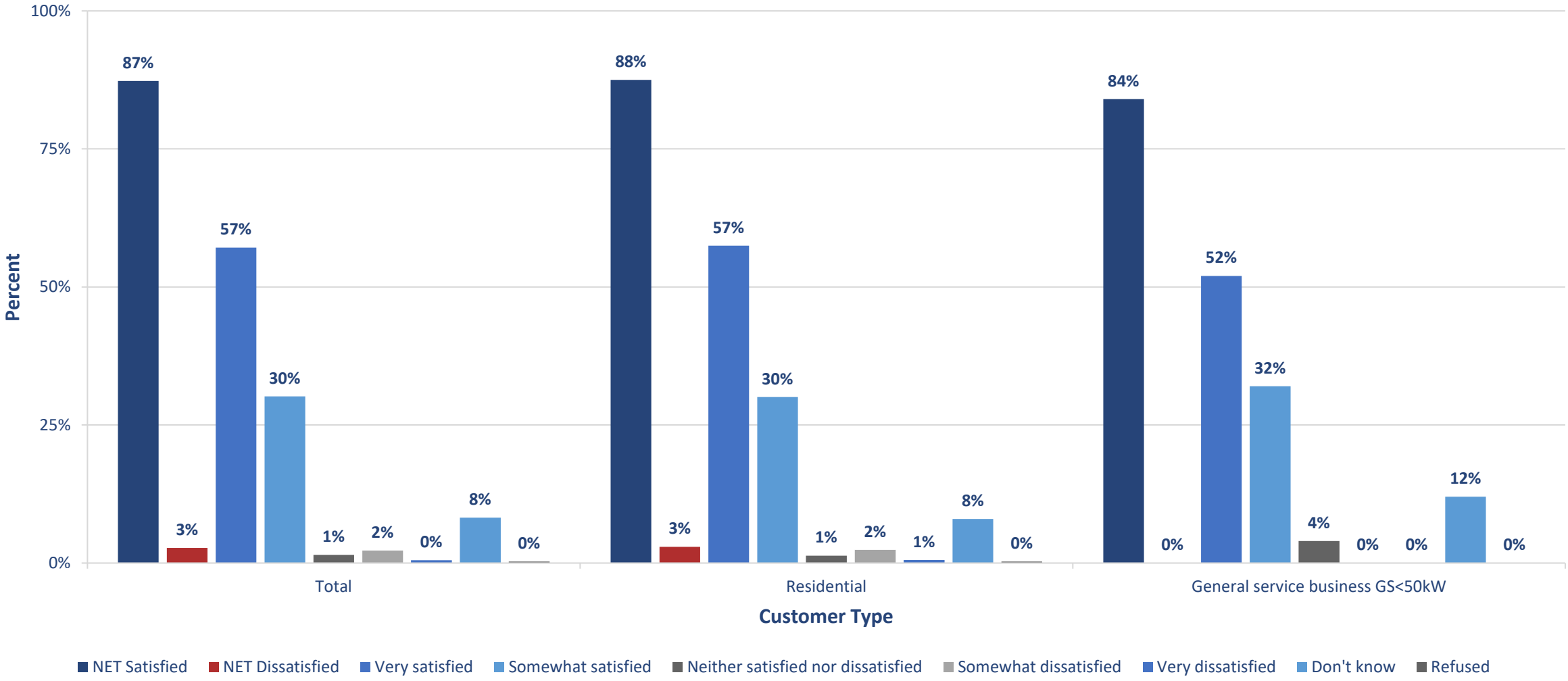

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REDHEAD INC MEDIA SOLUTIONS

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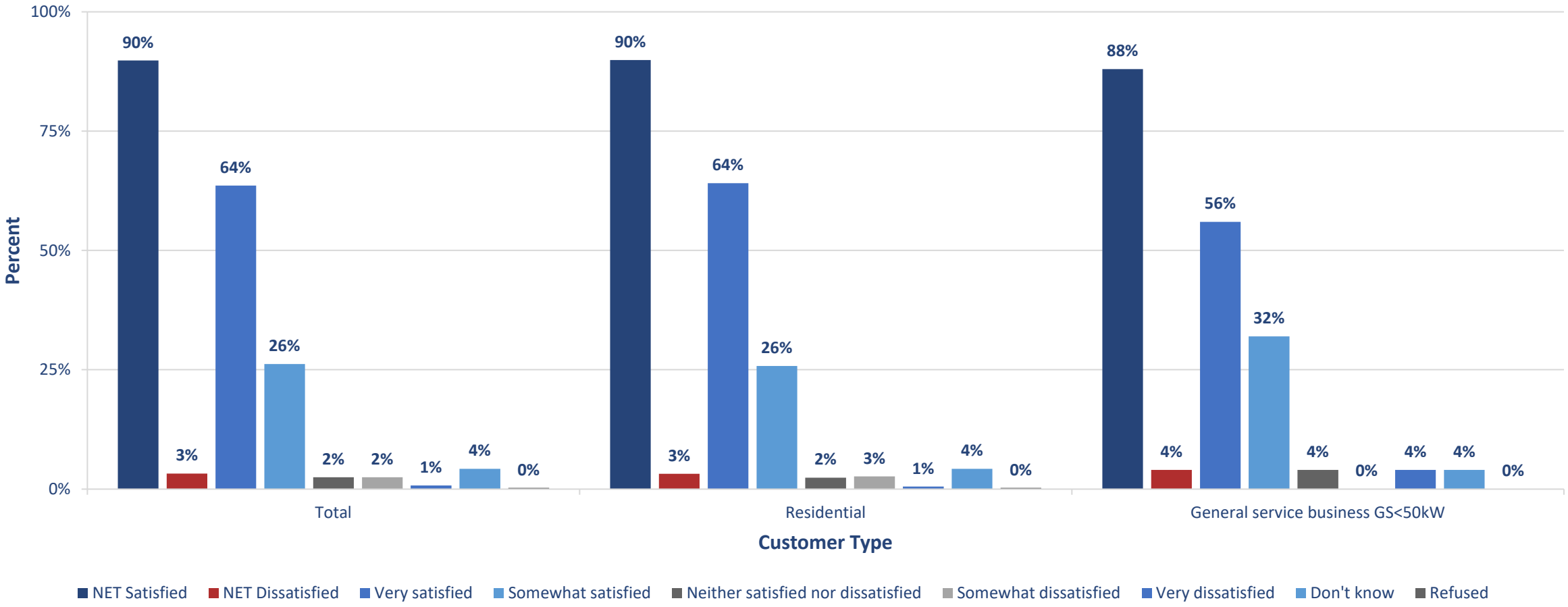

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REDHEAD INC MEDIA SOLUTIONS

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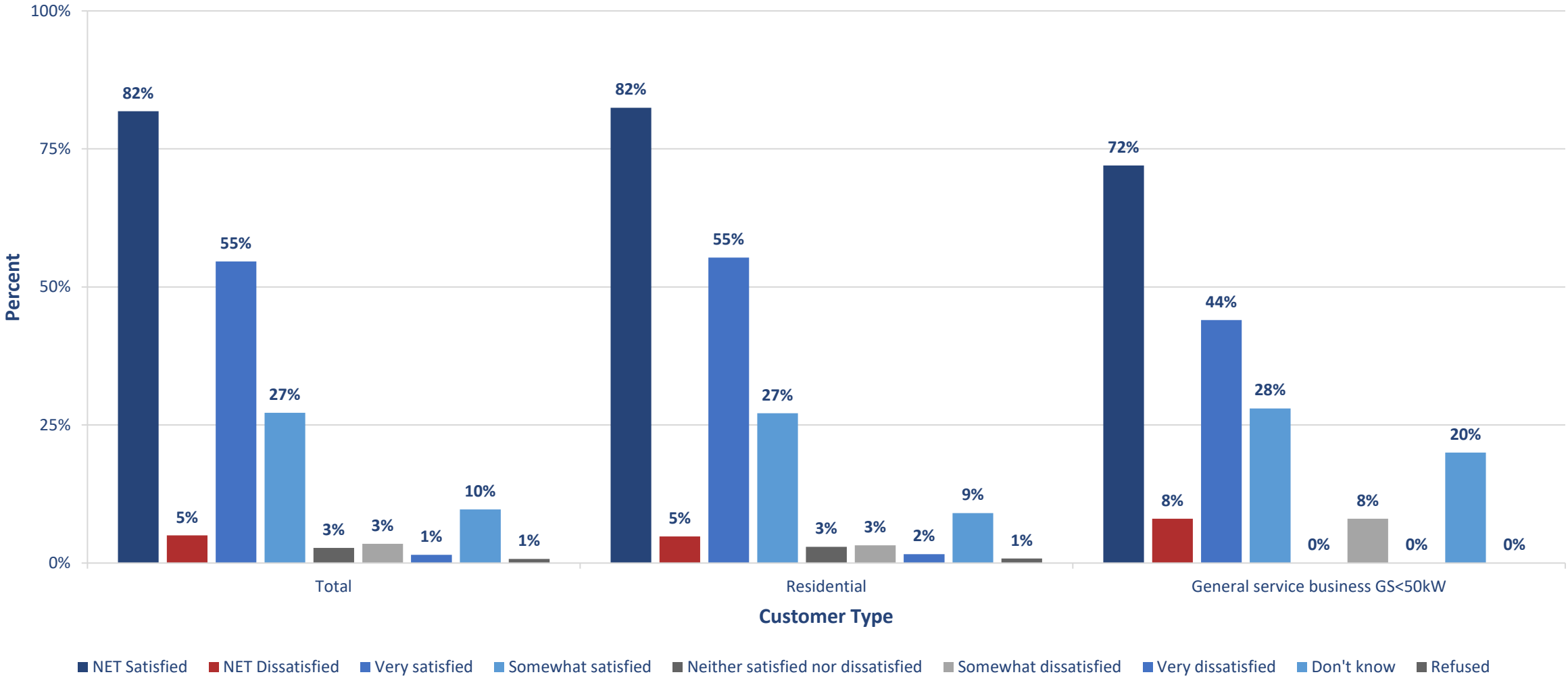

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REDHEAD INC MEDIA SOLUTIONS

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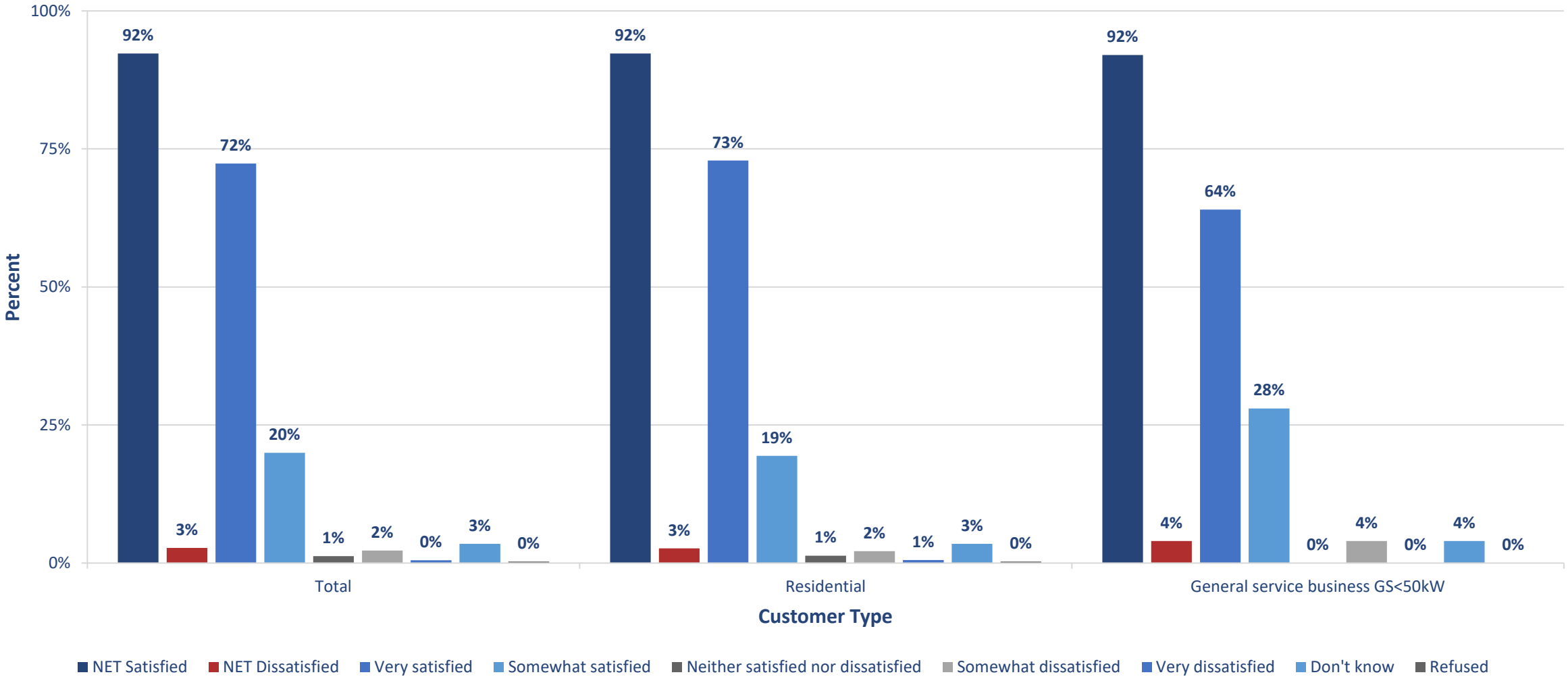

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REDHEAD INC MEDIA SOLUTIONS

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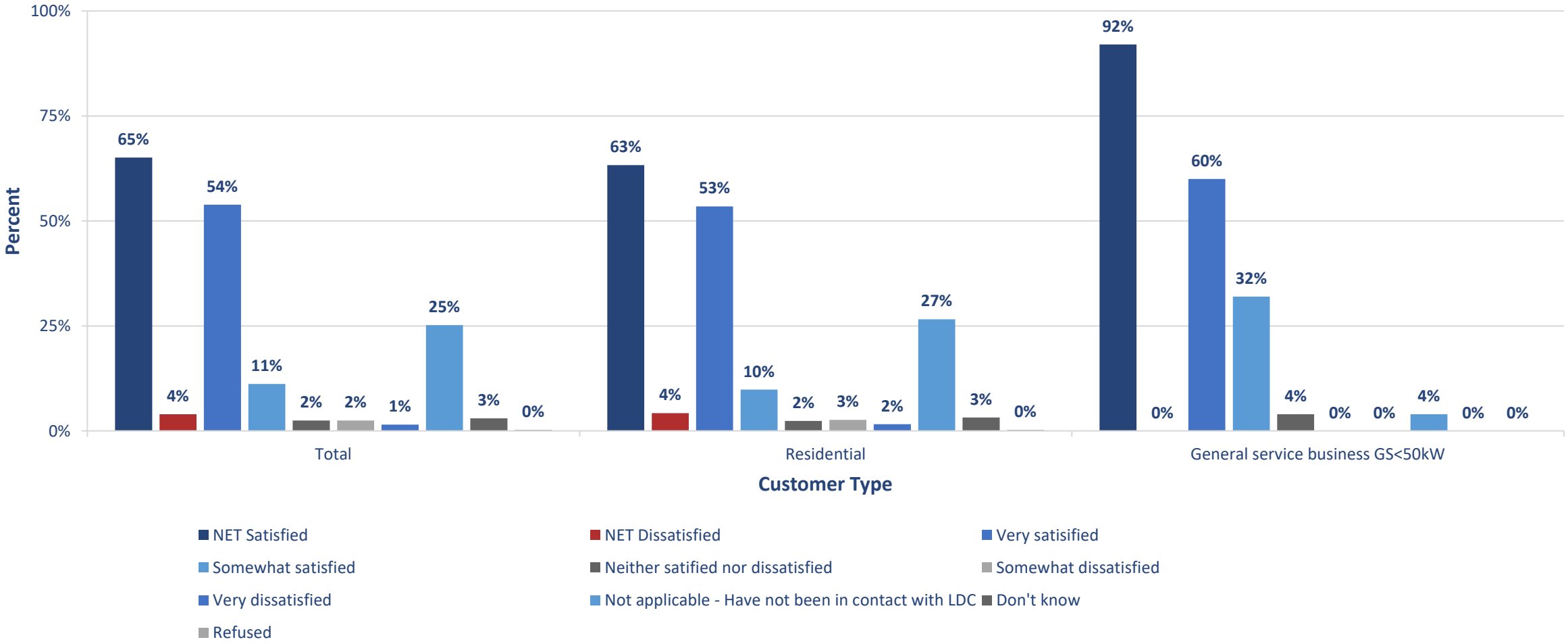

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REDHEAD INC MEDIA SOLUTIONS

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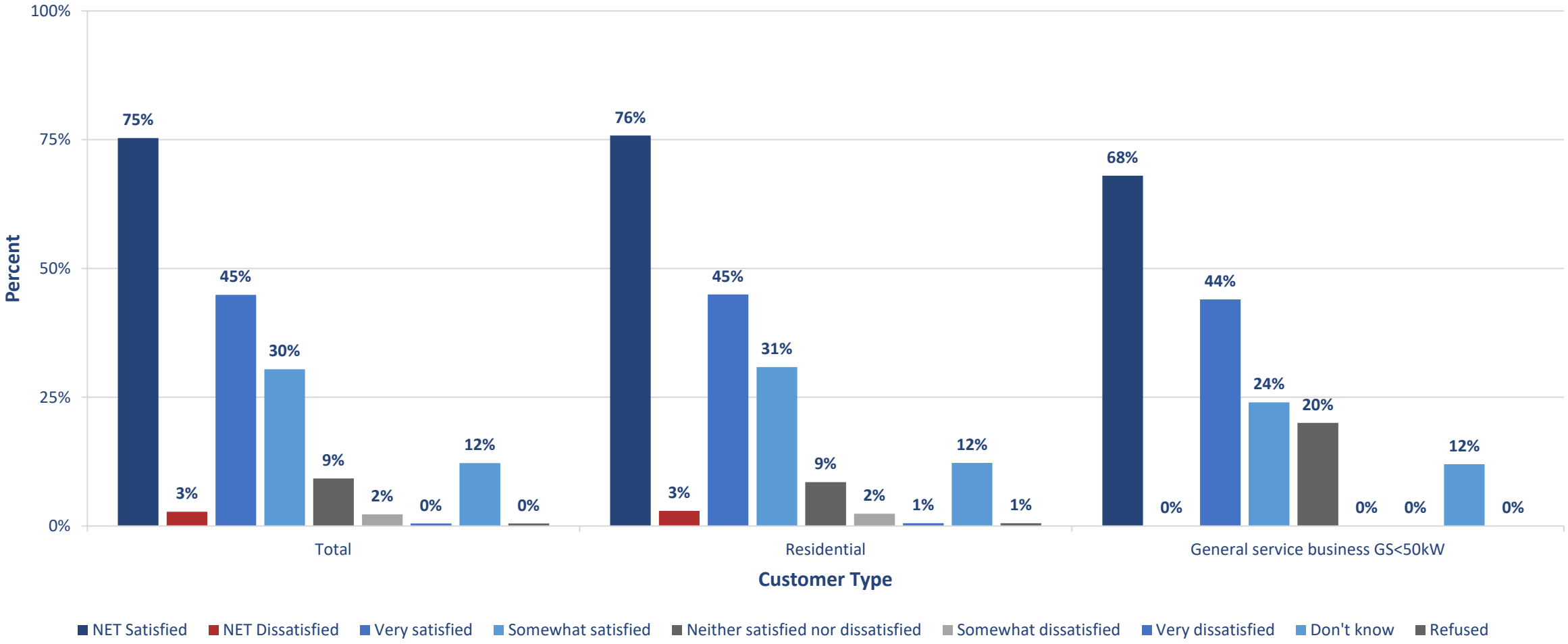
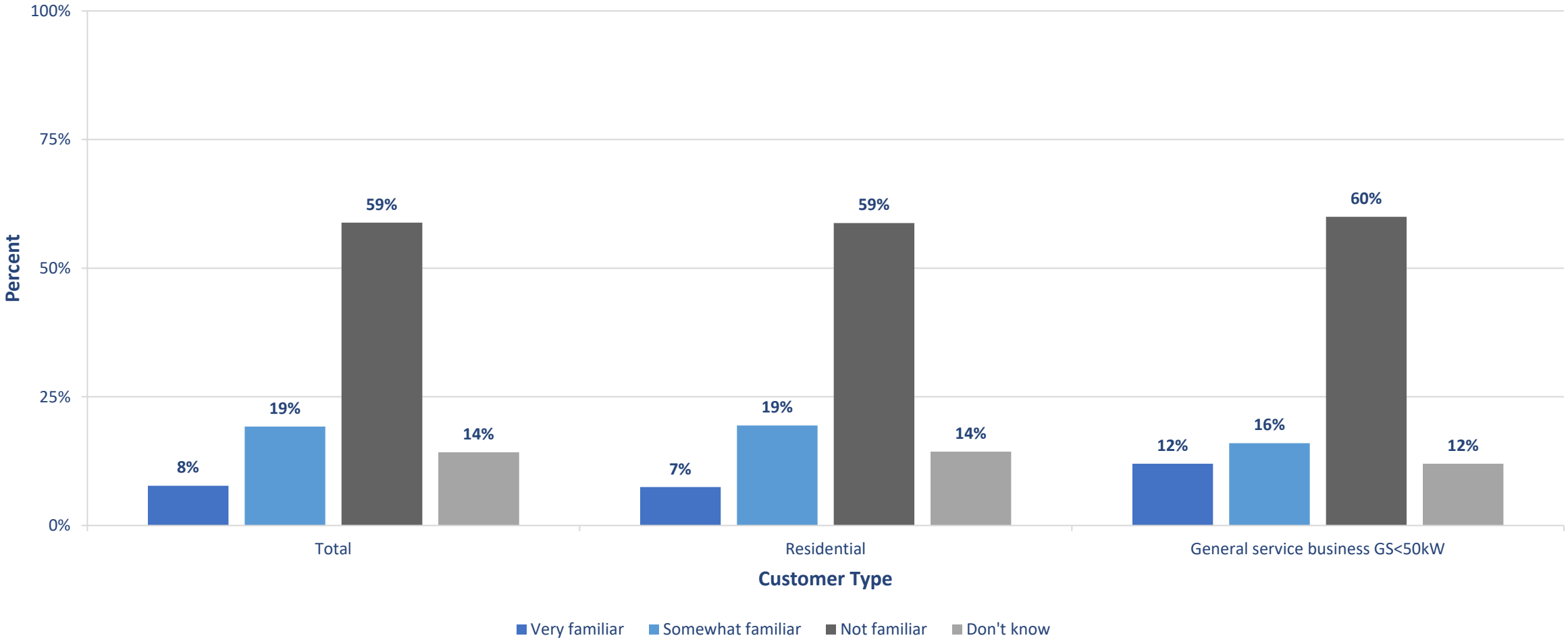


Source: Redhead Media Solutions/Advanis telephone random customer survey, January 11-February 17, 2021, n=401, accurate 4.7 percentage points plus or minus, 19 times out of 20.

REDHEAD MEDIA SOLUTIONS INC

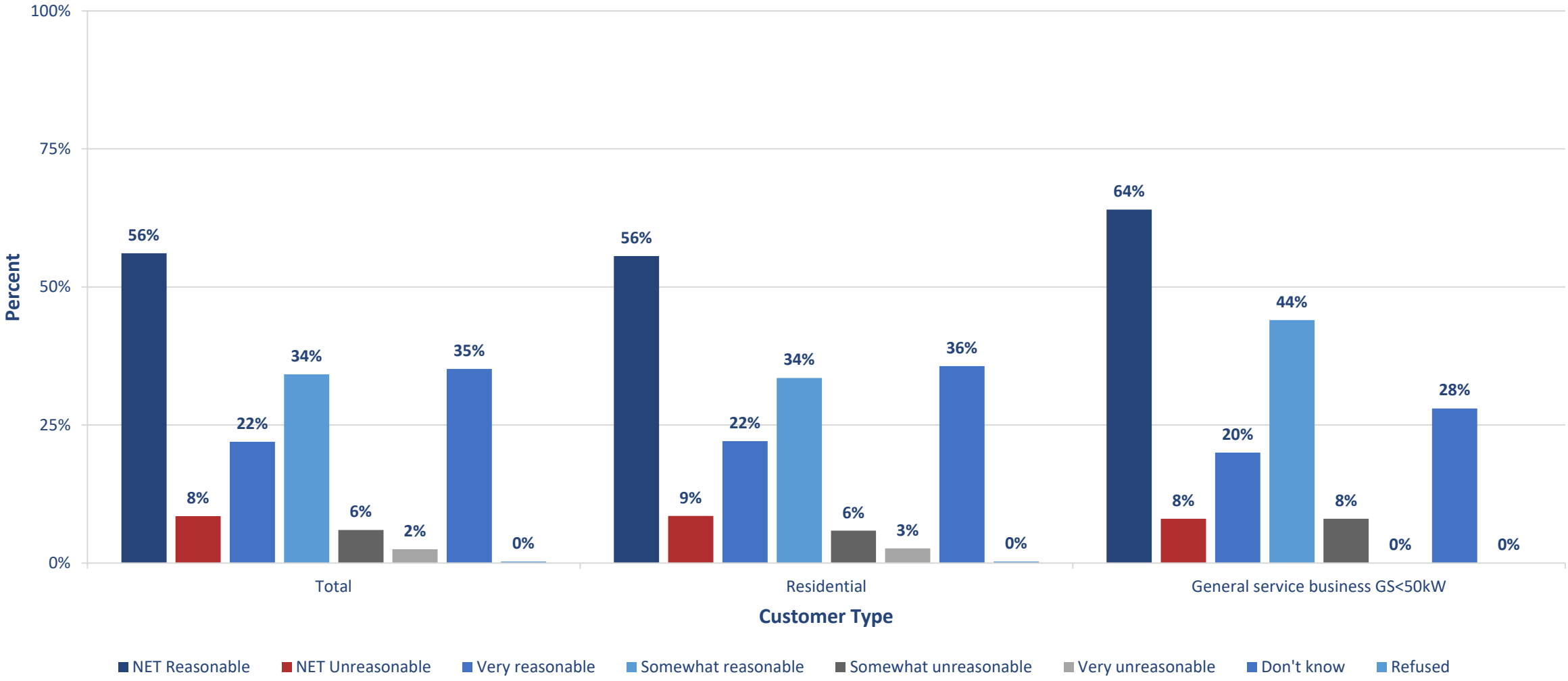
How familiar are you with the percentage of your electricity bill that went to Tillsonburg Hydro? So, NOT the portions allocated to power generation companies, transmission companies, the provincial government and regulatory agencies.



Source: Redhead Media Solutions/Advanis telephone random customer survey, January 11-February 17, 2021, n=401, accurate 4.7 percentage points plus or minus, 19 times out of 20.

REDHEAD INC MEDIA SOLUTIONS

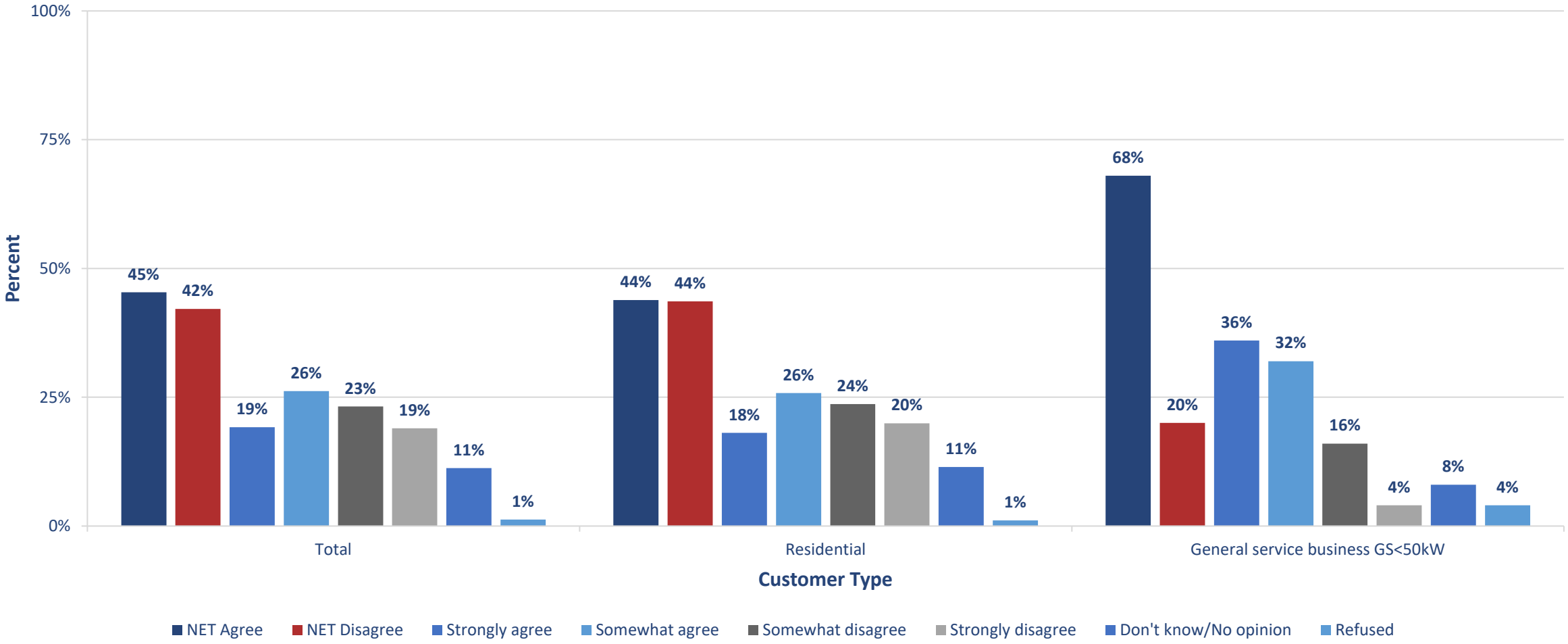
Do you feel that the percentage of your total electricity bill that you pay to Tillsonburg Hydro for the services they provide is...?



Source: Redhead Media Solutions/Advanis telephone random customer survey, January 11-February 17, 2021, n=401, accurate 4.7 percentage points plus or minus, 19 times out of 20.

REDHEAD MEDIA SOLUTIONS INC

The cost of my electricity bill has a major impact [on personal finances OR bottom line of organization]: To what extent do you agree with the following statements regarding the electricity system in Ontario?



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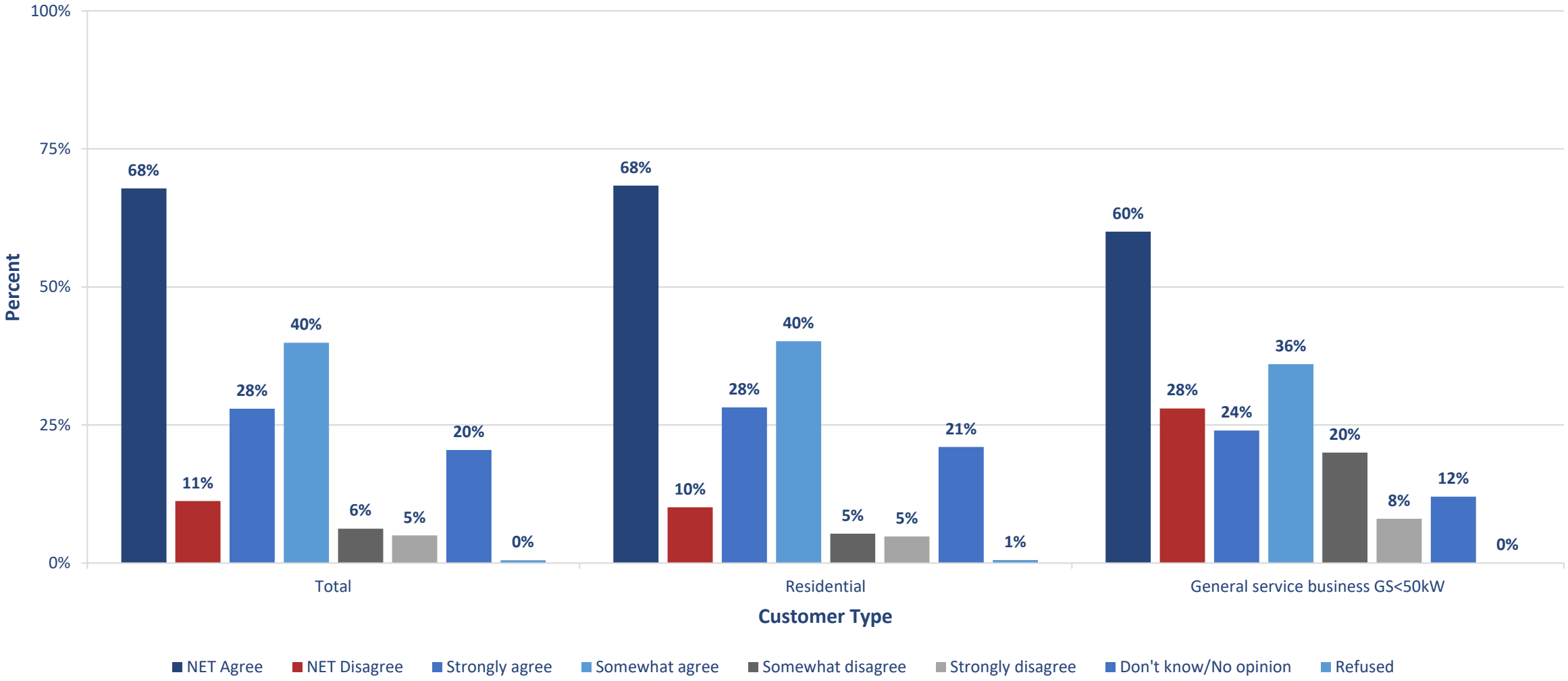
REDHEAD INC MEDIA SOLUTIONS

Customers are well served by the electricity system in Ontario: To what extent do you agree with the following statements regarding the electricity system in Ontario?



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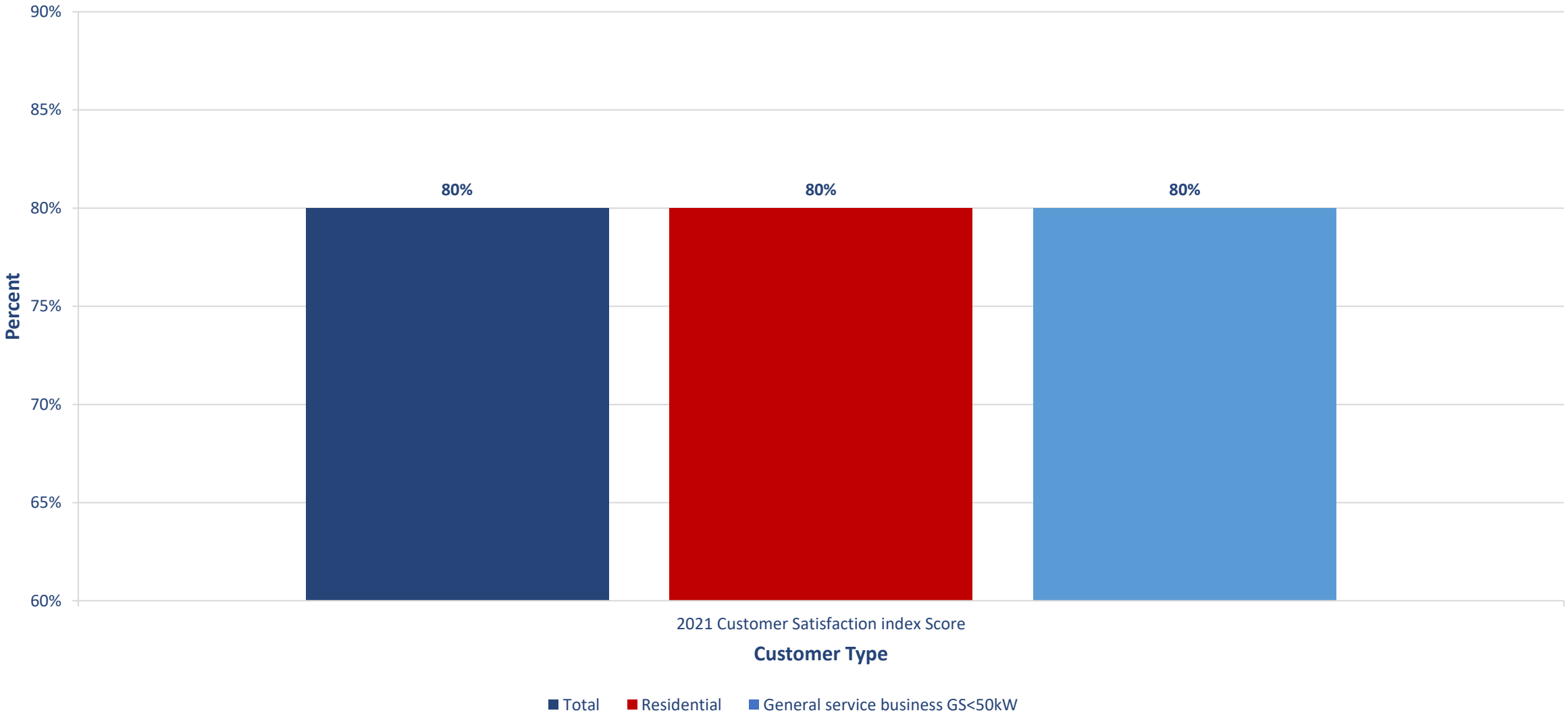
REDHEAD INC MEDIA SOLUTIONS

CUSTOMER SATISFACTION INDEX

REDHEAD INC
MEDIA SOLUTIONS

2021 Customer Satisfaction Index Score



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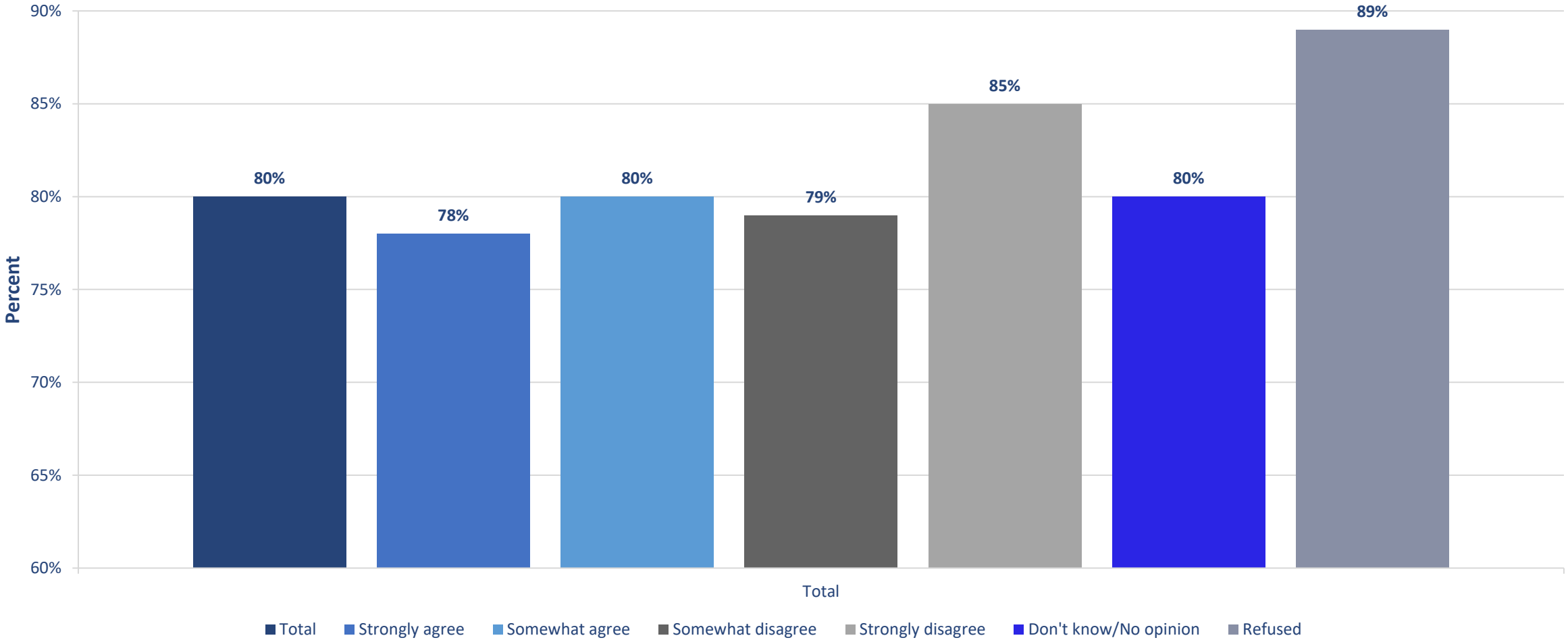
REDHEAD INC
MEDIA SOLUTIONS

Customer Satisfaction Index by the following statement:

The cost of my electricity bill has a major impact on [my personal finances/bottom line]



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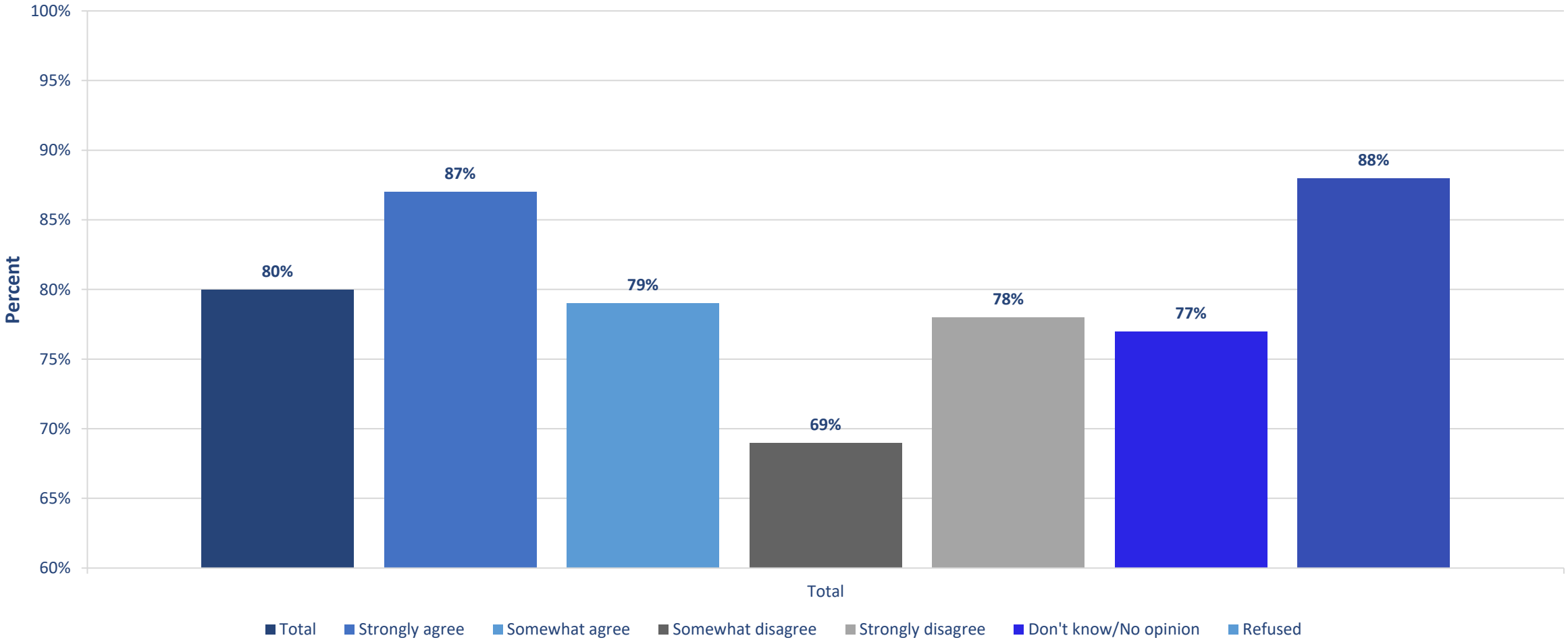
REDHEAD INC
MEDIA SOLUTIONS

Customer Satisfaction Index by the following statement:

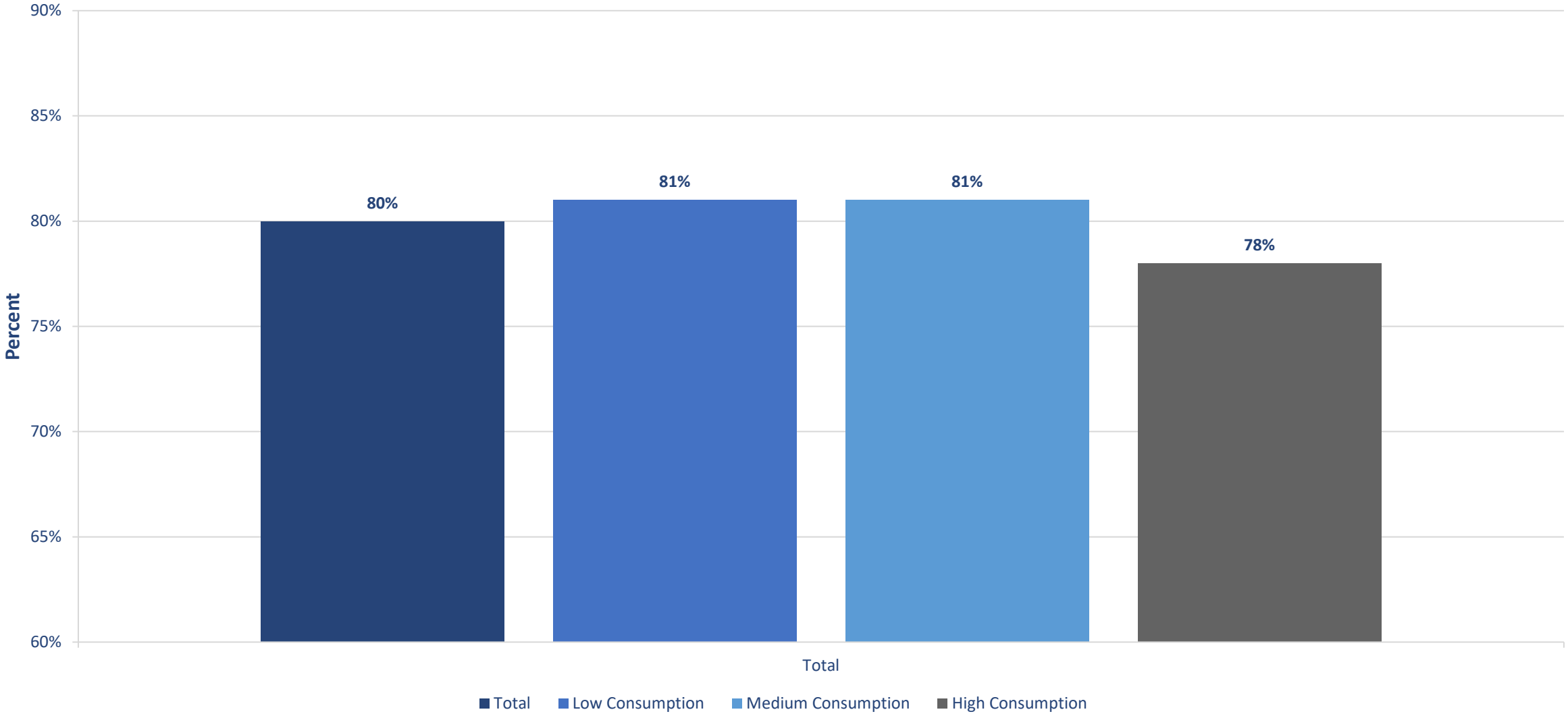
Customers are well served by the electricity system in Ontario



Source: Redhead Media Solutions/Advanis telephone random customer survey, January 11-February 17, 2021, n=401, accurate 4.7 percentage points plus or minus, 19 times out of 20.

REDHEAD INC
MEDIA SOLUTIONS

Customer Satisfaction Index by consumption



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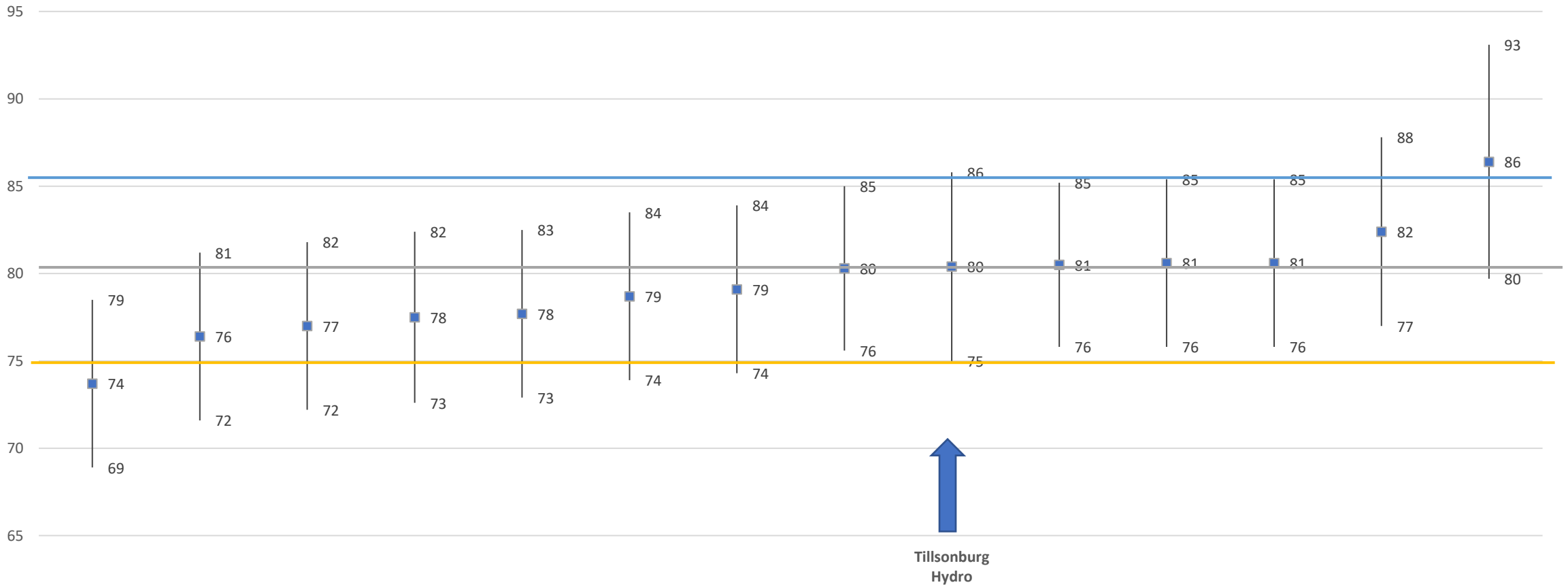
REDHEAD INC MEDIA SOLUTIONS

Customer Satisfaction Index Score Comparison to External LDCs
Upper and Lower Bound



- The lines denote Tillsonburg Hydro's upper and lower bound based on the CSI Score.
- Almost all LDCs confidence intervals overlap, similar to 2019.
- Tillsonburg Hydro overlaps with all LDCs, indicating statistical uniformity.

REDHEAD INC
MEDIA SOLUTIONS

CORE COMPARATIVE DATA 2019-2021

REDHEAD INC
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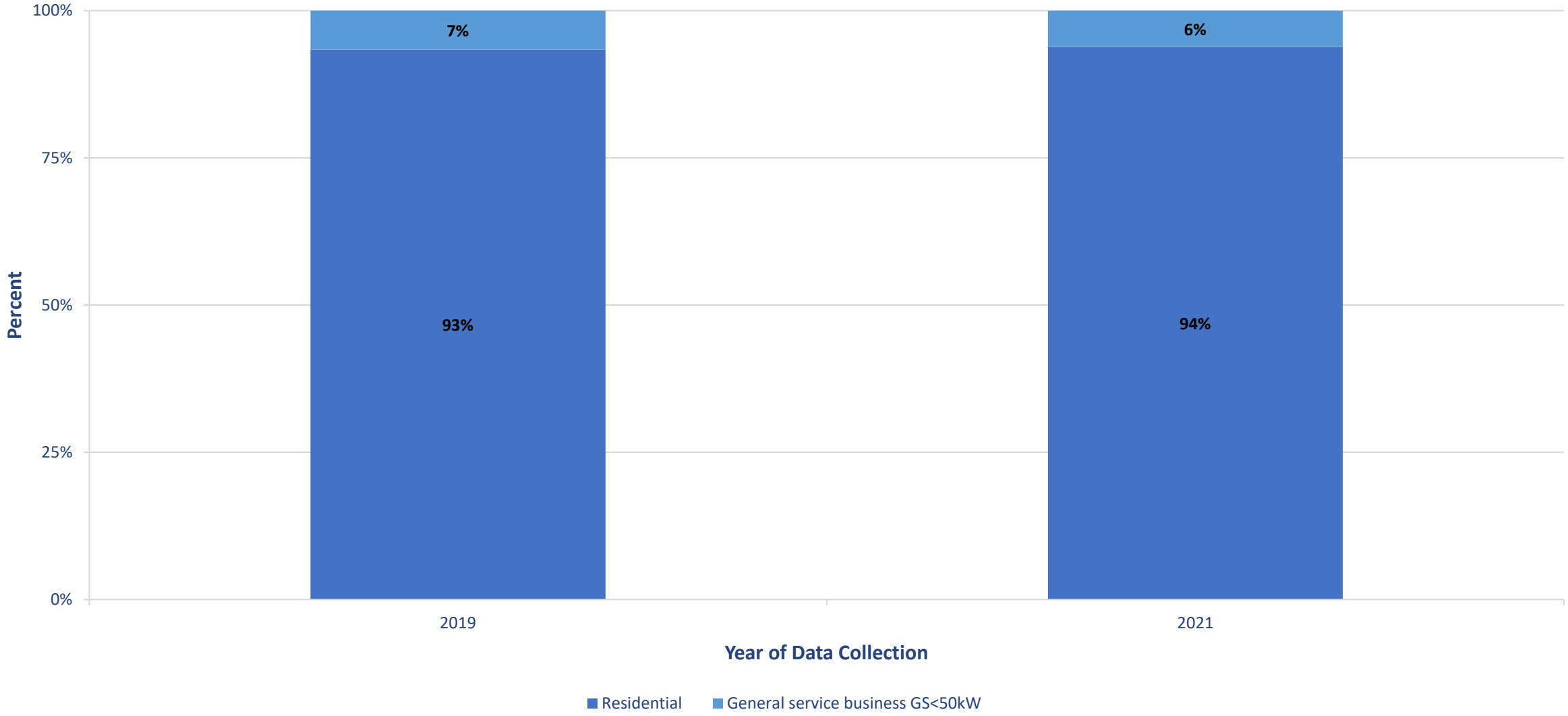
Customer Type



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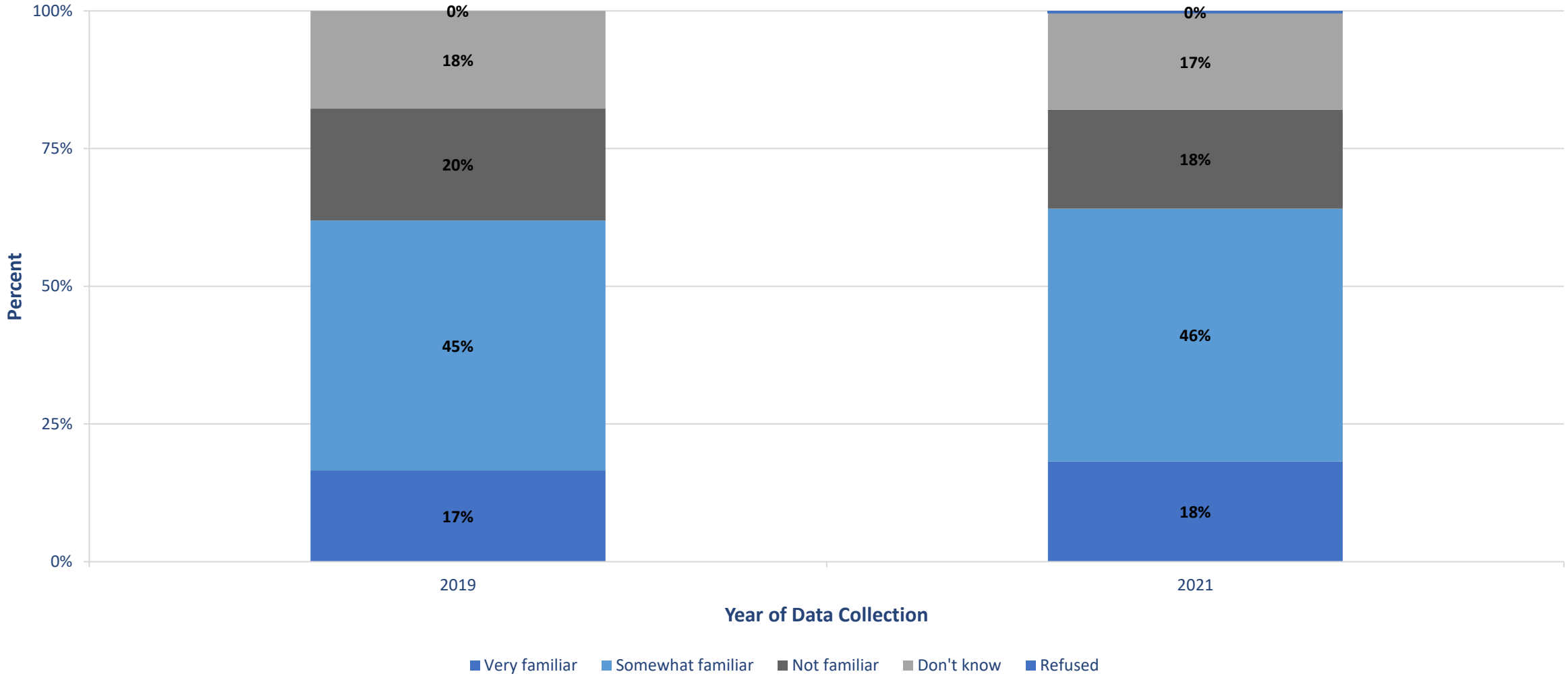
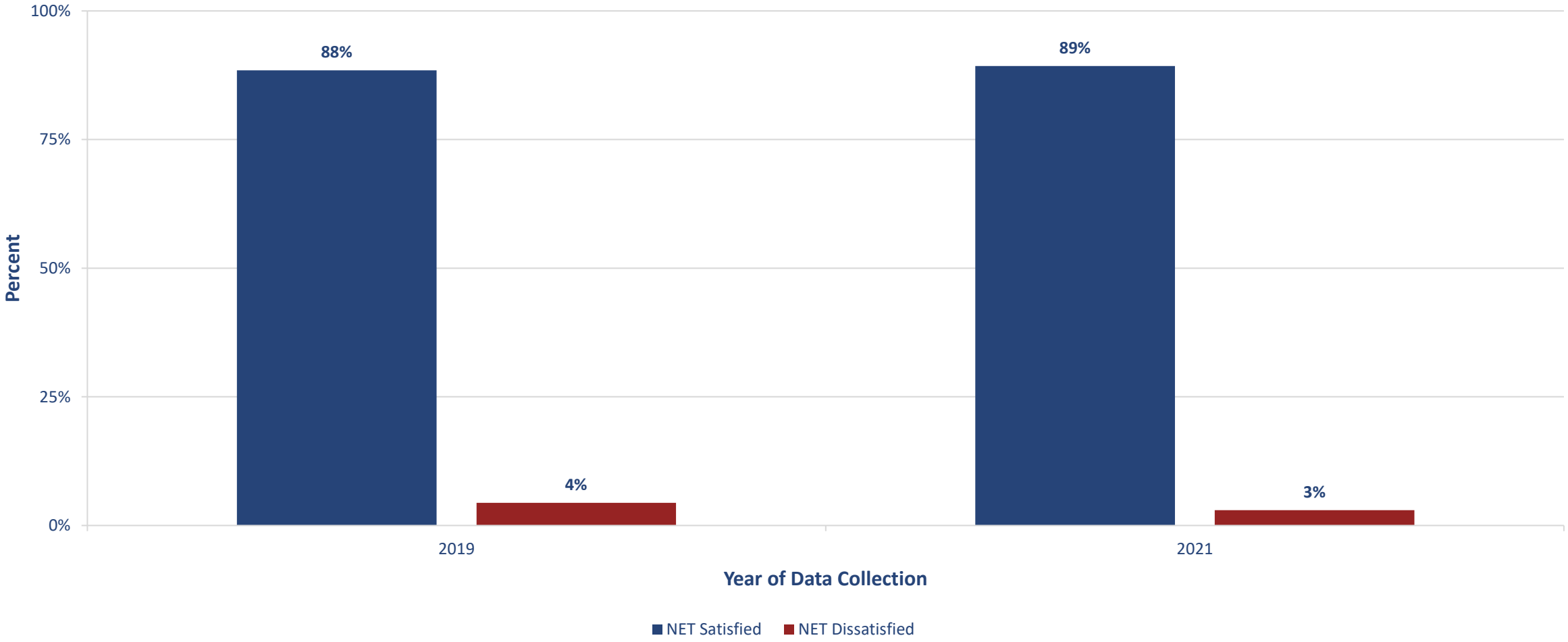
MEDIA SOLUTIONS

How familiar are you with Tillsonburg Hydro, which operates the electricity distribution system in your community?



REDHEAD INC MEDIA SOLUTIONS

Thinking specifically about the services provided to you and your community by Tillsonburg Hydro, overall, how satisfied are you with the services that you receive from Tillsonburg Hydro?



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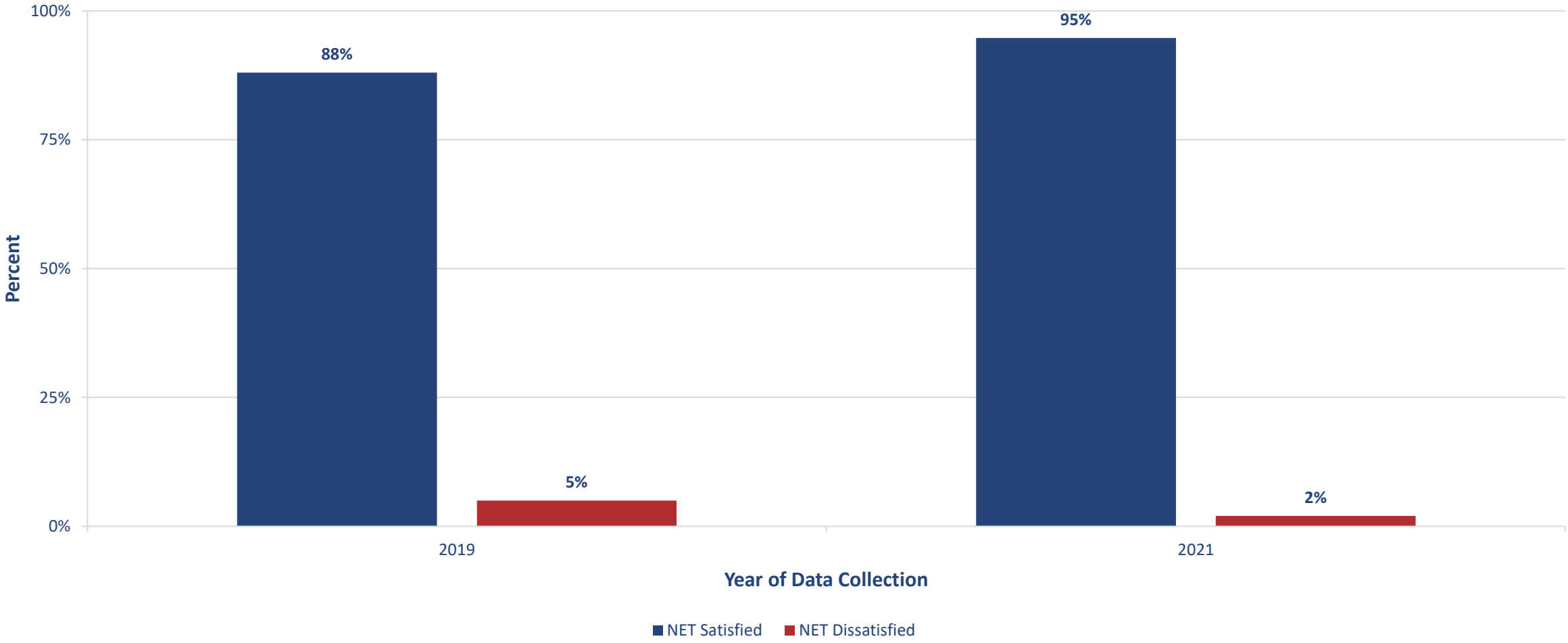

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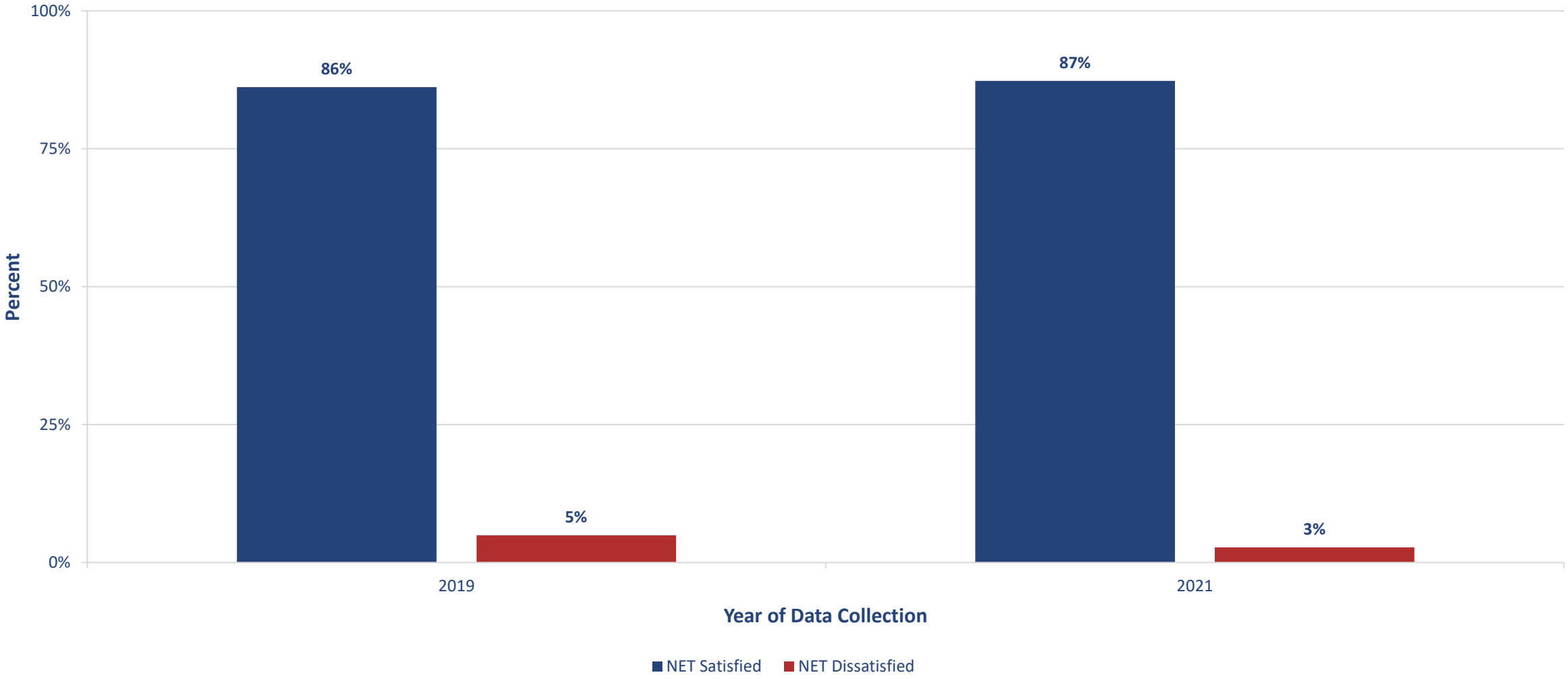

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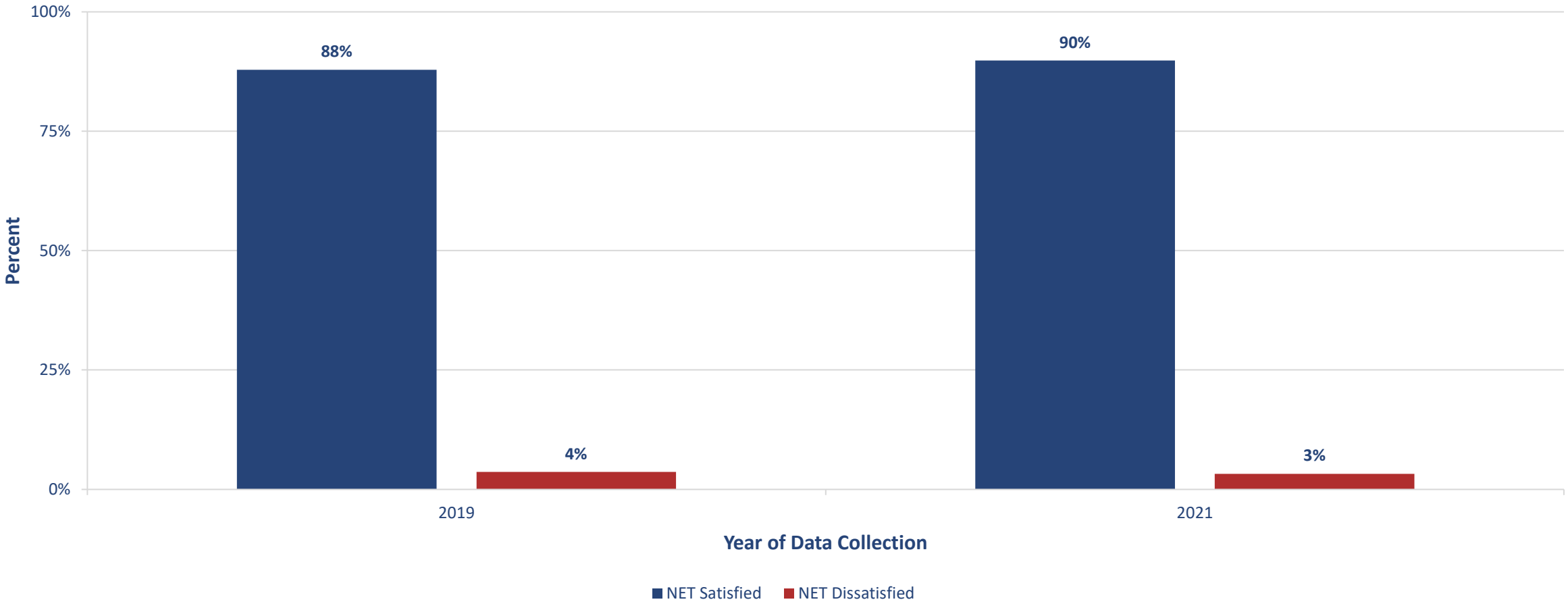

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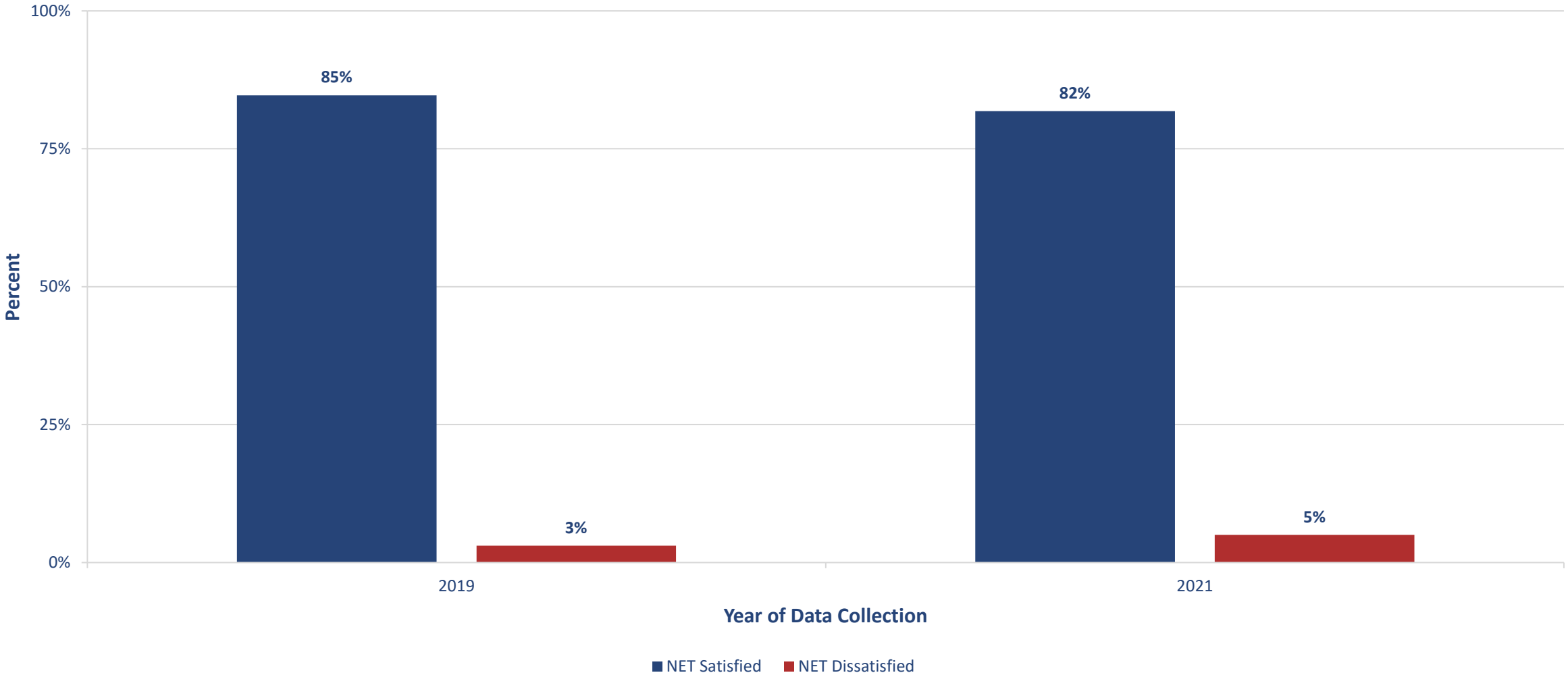

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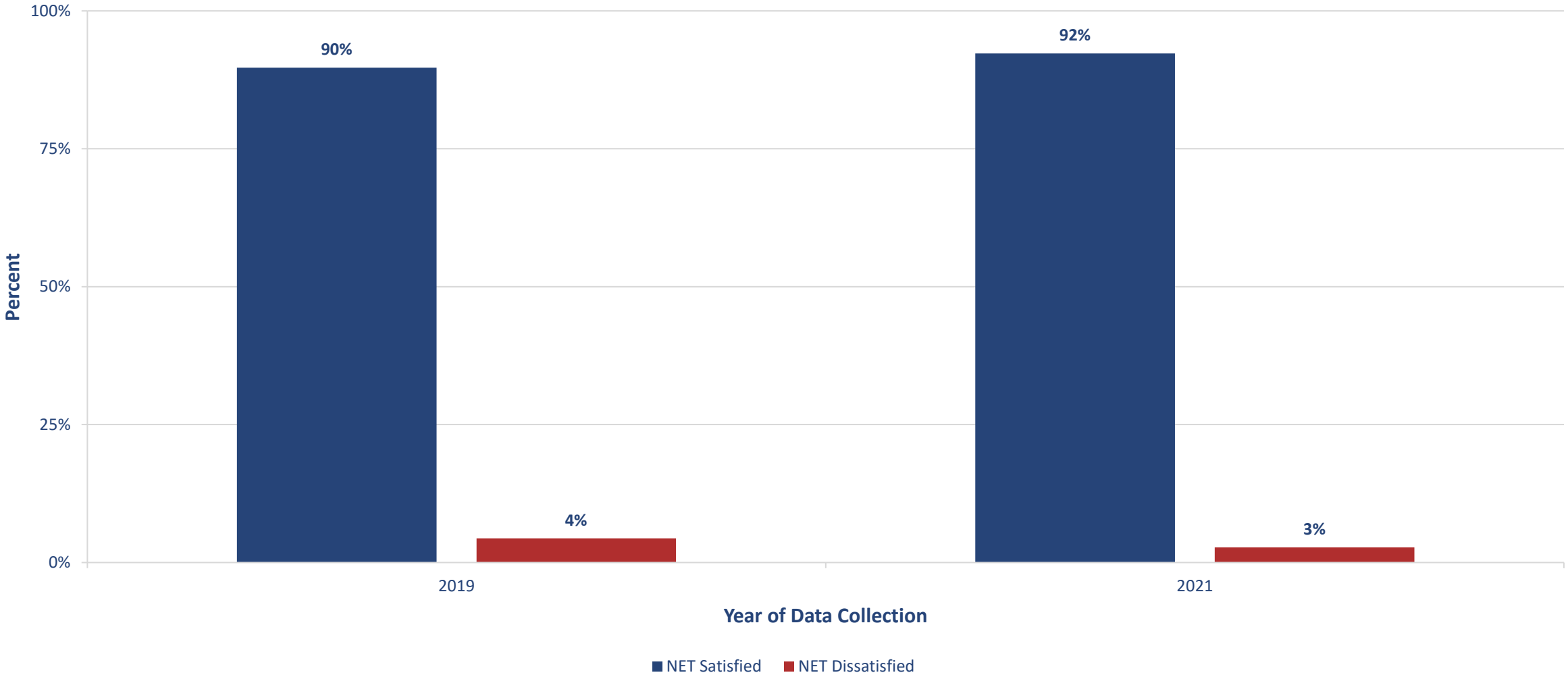

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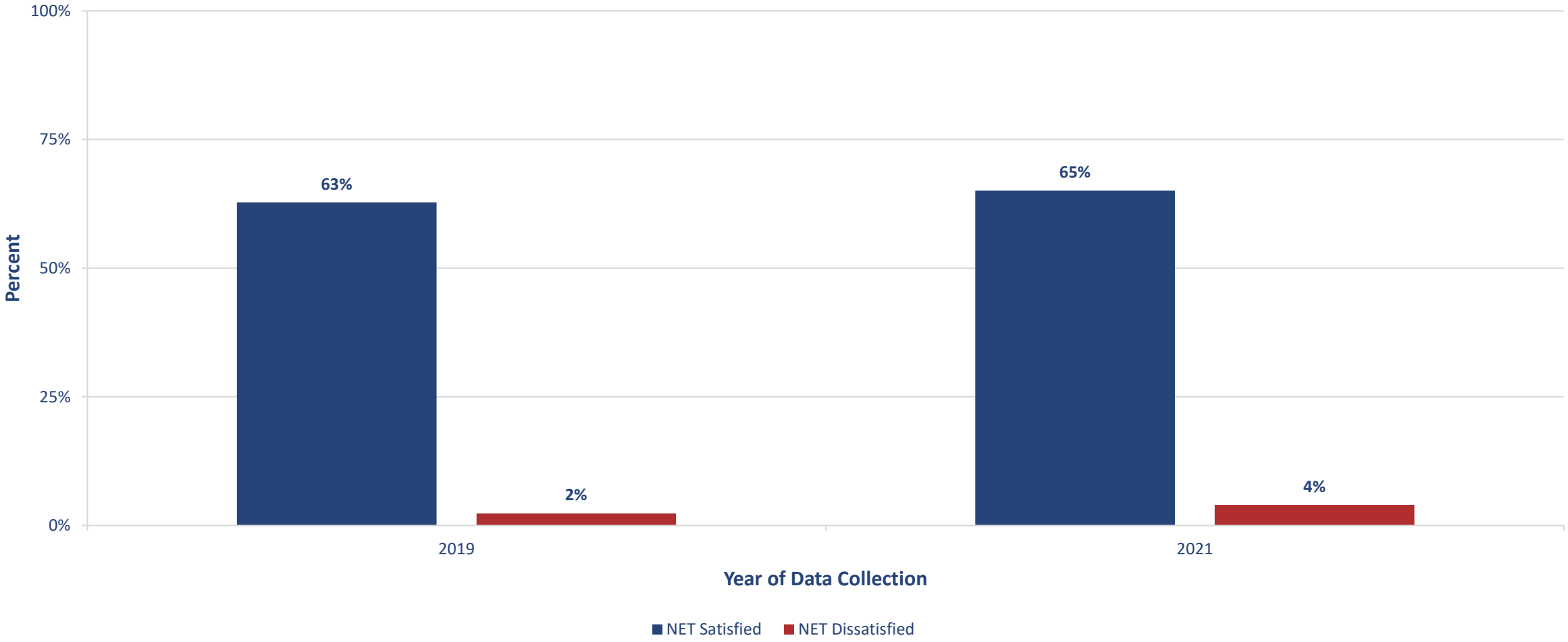

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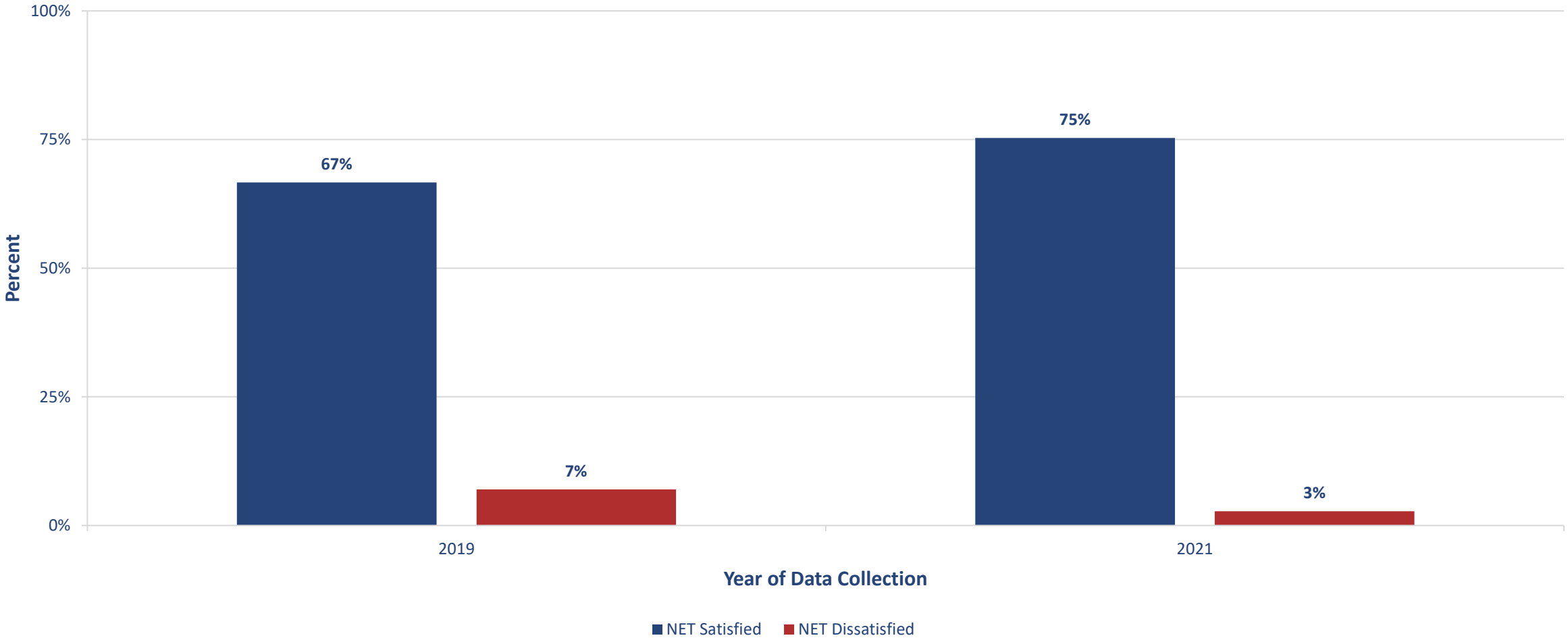

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