



27th Annual

Electric Utility Customer Satisfaction Survey

Tillsonburg Hydro



Methodology



- These results are based on online and telephone interviews of *415 respondents* who pay or look after the electricity bills for *Tillsonburg*. A sample size of 415 will provide a confidence level of 95% (+/- 4.8%)
- Customers surveyed were based on a *random sample* approach
- The following *segments* were surveyed:
 - Residential – 98%
 - Commercial – 2%
- UtilityPULSE segmented respondents into 3 “average kWh usage groups”: Group 1 represents lowest 25% of kWh usage, Group 2 middle 50%, and Group 3 top 25%
- The UtilityPULSE Report Card® is computed by formulas which map the attributes of corporate image to customer satisfaction and loyalty
- Comparator data:
 - Ontario benchmark
 - National benchmark
 - Cohort average for 2025 (all participating LDCs)



Numbers at a Glance



	Tillsonburg	National	Ontario
	2025	2025	2025
Customer Satisfaction: Initial	94%	88%	89%
Customer Satisfaction: Post	95%	86%	88%
Customer Experience Performance Rating (CEPr)	90%	78%	78%
Customer Centric Engagement Index (CCEI)	88%	77%	77%
Credibility & Trust Index	89%	78%	78%

Perceptions of Core Operations



Core Operational Attributes			
	Tillsonburg	National	Ontario
Provides consistent, reliable electricity	92%	81%	81%
Quickly handles outages and restores power	92%	78%	79%
Has accurate billing	87%	80%	80%
Has a standard of reliability that meets expectations	91%	80%	80%

Base: total respondents with an opinion



“What our customers say”

92%

“Provides consistent, reliable electricity...”

Problems/Issues Experienced in the Past 12 Months



Experienced Problem/Issue in Past 12 Months			
	Tillsonburg	National	Ontario
	2025	2025	2025
Outages	26%	46%	47%
Billing	8%	9%	11%
Other Issues	4%	7%	8%

Base: total respondents



31% of customers said they contacted Tillsonburg about their issue (vs. 40% nationally and 40% in Ontario).

“What our customers say”

87%

“... Provides accurate billing...”

“What our customers say”

92%

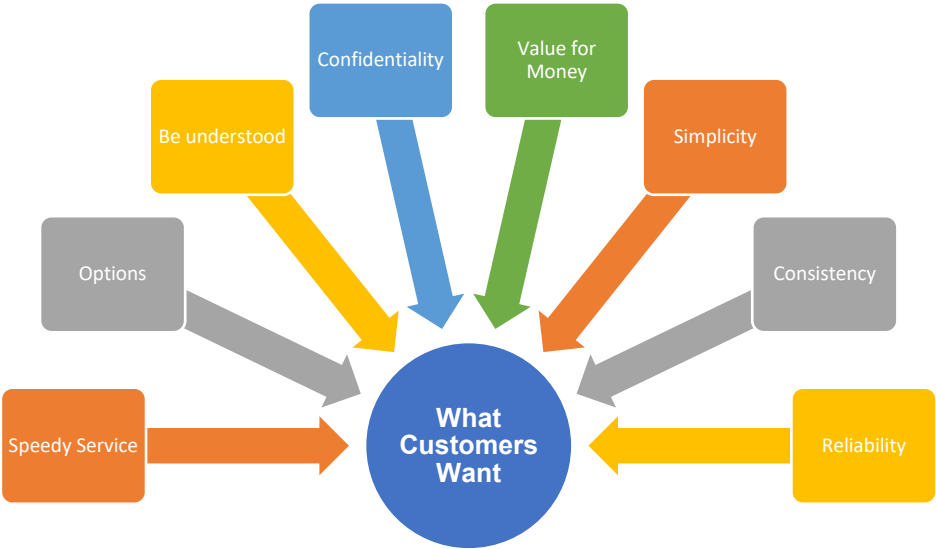
“... Quickly handles outages and restores power...”

Perceptions of Customer Service Quality



Core Customer Service Quality Attributes			
	Tillsonburg	National	Ontario
Is pro-active in communicating changes and issues	83%	77%	77%
Is 'easy to do business with'	90%	78%	78%

Base: total respondents with an opinion



“What our customers say”

90%

“... Is easy to do business with...”

Recent Customer Service Experience Satisfaction



Customer Service Experience			
Top 2 Boxes: 'very satisfied + fairly satisfied'	Tillsonburg	National	Ontario
OVERALL SATISFACTION	72%	76%	77%

Base: respondents contacting utility, small sample size

“What our customers say”

94%

“Satisfied with Tillsonburg Hydro overall...”

Customer Effort and Experience Score™ (CEES) Defined

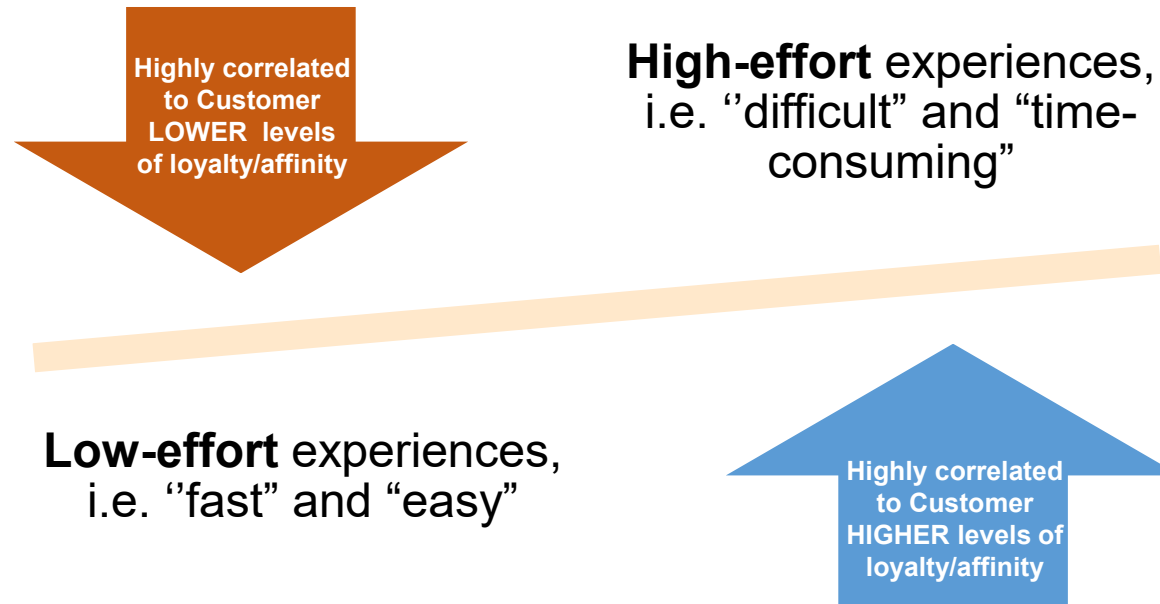
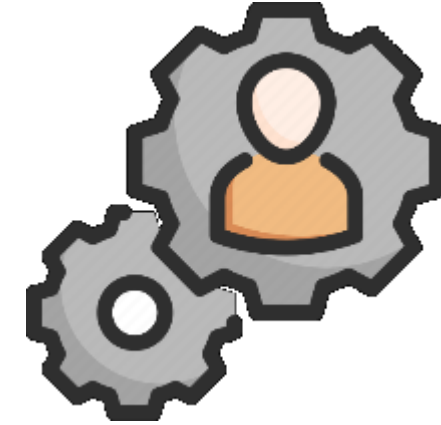
Two Drivers of Customer Effort:

1. How much effort it takes to get service:

- The amount of time and energy is used to interact with the LDC
- The ease or difficulty it is to do business with the LDC

2. How the experience makes a Customer feel:

- Happy, satisfied, content or
- Frustrated, dissatisfied, upset



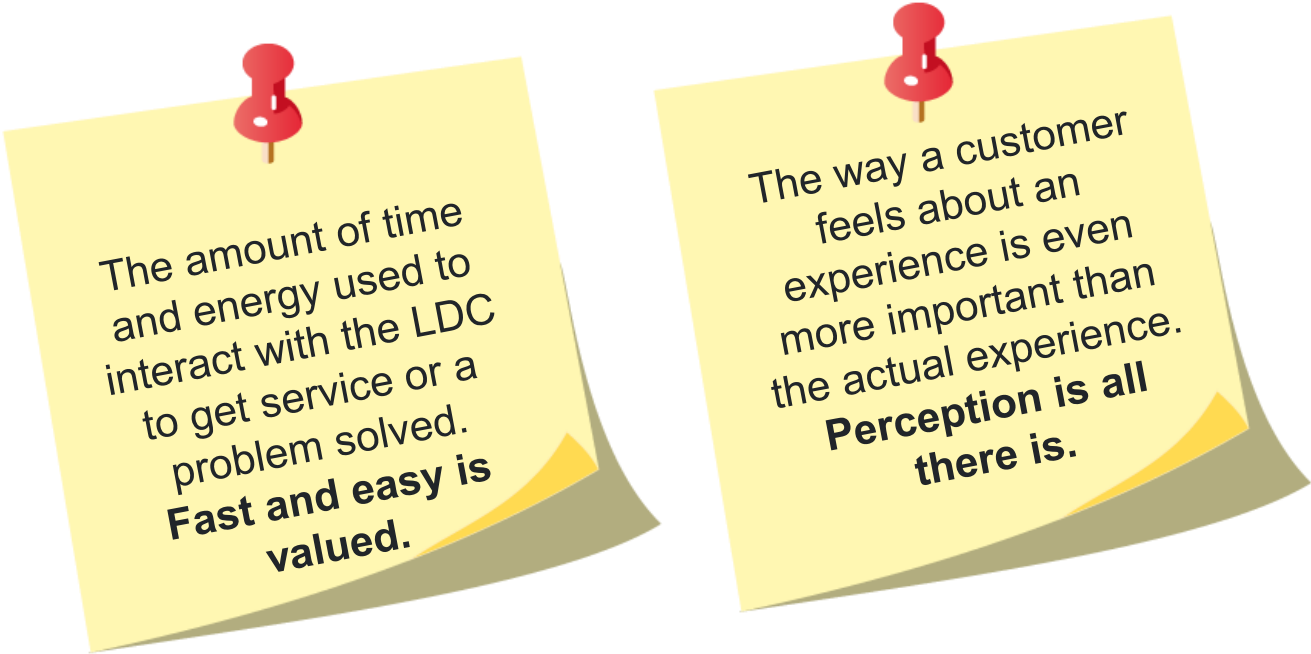
Customer Effort and Experience Score™ (CEES)



Customer Effort and Experience Score™ (CEES)						
	Tillsonburg	NATIONAL			ONTARIO	
	2025	2023	2024	2025	2023	2025
Opportunity Range* <15%			7%	7%		8%
Good Range* 15-34%	16%	21%			20%	
Very Good Range* 35+%						

Tillsonburg has a **Customer Effort and Experience Score™ (CEES)** of **16%**. The National Benchmark is 7%, Ontario Benchmark is 8%, and cohort average is 35%.

Base: total respondents
*Note: range bands represent 2025 data and can change year-to-year



“What our customers say”

16%

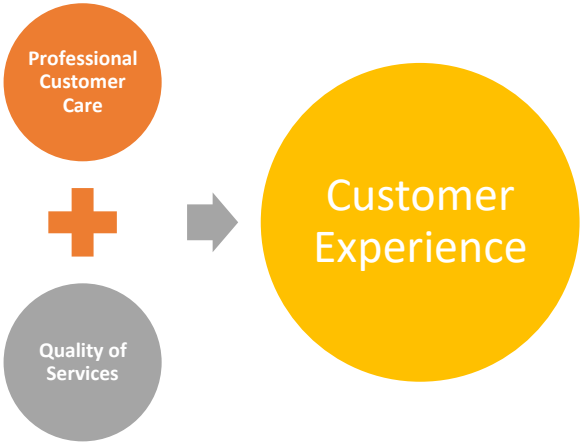
“... Customer Effort and Experience Score™ (CEES)...”

CEPr: Customer Experience Performance Rating



CEPr: Customer Experience Performance Rating							
	Tillson-burg	NATIONAL			ONTARIO		
	2025	2023	2024	2025	2023	2024	2025
CEPr	90%	82%	79%	78%	82%	79%	78%

Base: total respondents



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?

“What our customers say”

90%

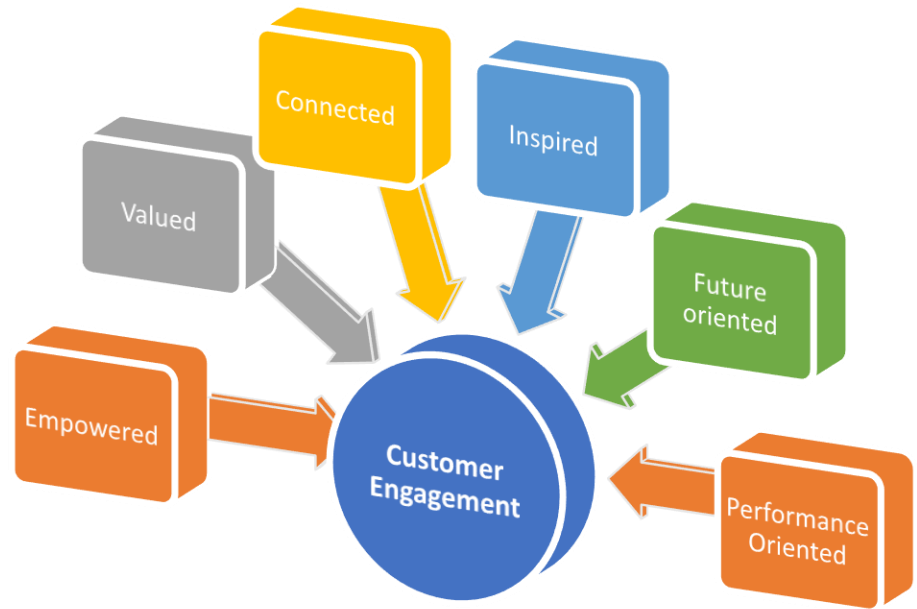
“CEPr: Customer experience rating...”

CCEI: Customer Centric Engagement Index



CCEI: Customer Centric Engagement Index							
	Tillson-burg 2025	NATIONAL			ONTARIO		
	2025	2023	2024	2025	2023	2024	2025
CCEI	88%	80%	78%	77%	80%	78%	77%

Base: total respondents



“What our customers say”

88%

“... CCEI: Customer Centric Engagement Index...”

CEES, CEPR, CCEI Summary By Key Groups



Scores are notably lower among customers who do not believe that Tillsonburg has proactive communications or were not satisfied with their customer service experience. They are also lower among those who have trouble paying their bill or have experienced issues.

	TOTAL	KEY SCORES PROACTIVE COMMUNICATIONS		RECENT CS EXPERIENCE	
		Agree	Disagree	Satisfied	Not
CEES	16%	20%	-18%	12%	-19%
CEPR	90%	92%	75%	86%	68%
CCEI	88%	90%	68%	83%	59%

Base: total respondents

	TOTAL	KEY SCORES									
		ABILITY TO PAY				OUTAGE ISSUE		BILLING ISSUE		OTHER ISSUES	
		Not a worry	Sometimes a worry	Often a problem	Depends	Yes	No	Yes	No	Yes	No
CEES	16%	21%	9%	-2%	11%	12%	18%	0%	18%	-5%	17%
CEPR	90%	94%	86%	75%	89%	88%	91%	78%	92%	82%	91%
CCEI	88%	92%	83%	72%	86%	84%	89%	73%	89%	73%	88%

Base: total respondents

Credibility and Trust Rating



Demonstrating Credibility and Trust
Knowledge
The utility is seen as being knowledgeable about the services it provides, about what is happening in the industry, and how customers can reduce costs or create more value.
Integrity
The utility is seen as an organization that will act in the best interests of its customers and can be counted on to provide services and resolve problems in a professional manner.
Involvement
The utility is actively involved in the industry, in the community and in things that affect the customer.
Trust
The utility is an organization that can be trusted and is worthy of respect.
Overall Tillsonburg 89% (National 78%; Ontario 78%)

Base: total respondents

	CREDIBILITY & TRUST						
	Tillson-burg	NATIONAL			ONTARIO		
	2025	2023	2024	2025	2023	2024	2025
CREDIBILITY & TRUST	89%	81%	78%	78%	81%	78%	78%



“What our customers say”

89%

“Credibility & Trust Score”

Credibility & Trust Rating & Sector Confidence



Customers are well served by the electricity system in Ontario			
	Tillsonburg		Ontario
	2025	2024	2025
AGREE NET	89%	84%	86%
Agree strongly	36%	28%	32%
Agree somewhat	53%	57%	54%
Disagree somewhat	7%	14%	10%
Disagree strongly	4%	2%	3%
DISAGREE NET	11%	16%	14%

Base: total respondents with an opinion

CREDIBILITY & TRUST SCORE						
SECTOR CONFIDENCE						
TOTAL	Agree NET	Agree strongly	Agree somewhat	Disagree NET	Disagree somewhat	Disagree strongly
89%	91%	96%	87%	75%	64%	82%

CREDIBILITY & TRUST SCORE						
Total	OUTAGE ISSUE		BILLING ISSUE		OTHER ISSUES	
	Yes	No	Yes	No	Yes	No
89%	86%	90%	76%	90%	79%	89%

“What our customers say”

89%

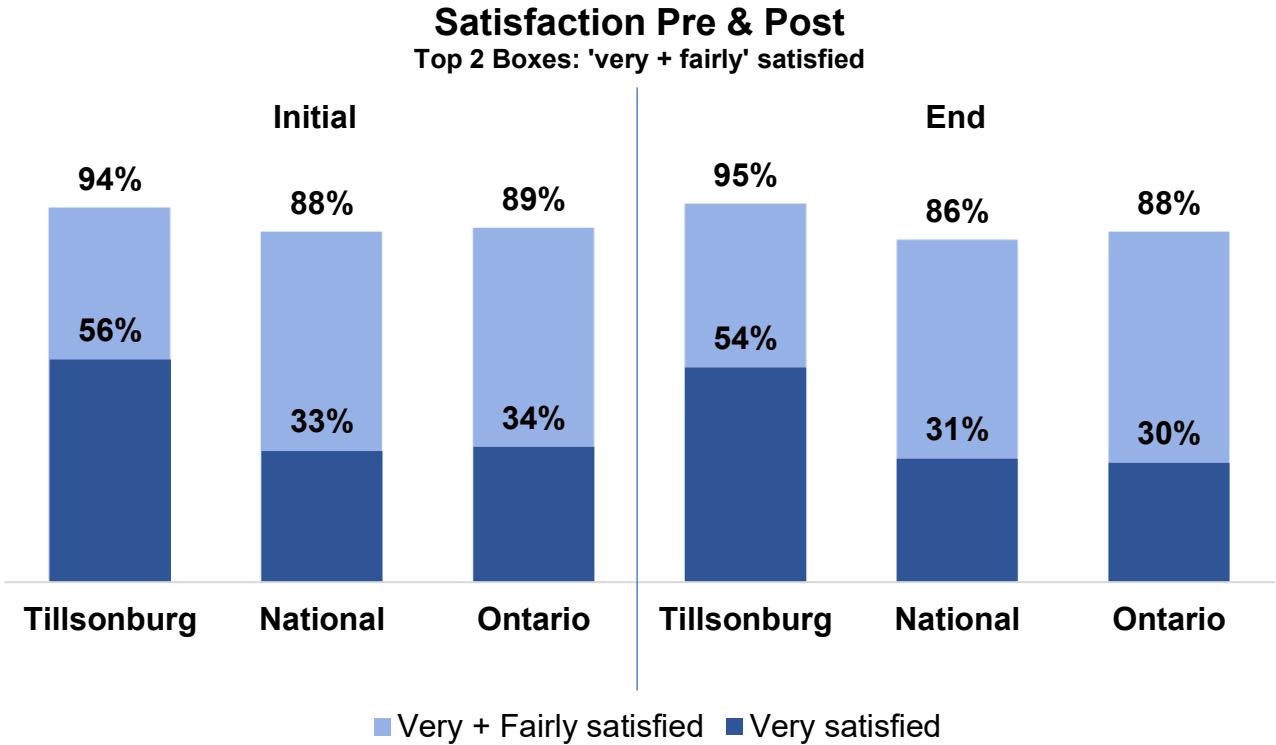
“Customers are well served by the electricity system in Ontario”

Customer Satisfaction



Top 2 Boxes: 'very + fairly satisfied'	Satisfaction Pre & Post						
	Tillson-burg	NATIONAL			ONTARIO		
	2025	2023	2024	2025	2023	2024	2025
PRE: Initial Satisfaction Scores	94%	94%	87%	88%	95%	88%	89%
POST: End of Interview	95%	92%	85%	86%	93%	86%	88%

Base: total respondents with an opinion



“What our customers say”

PRE **94%**

“SATISFIED: Beginning of Interview”

“What our customers say”

POST **95%**

“SATISFIED: End of Interview”

Customer Satisfaction By Key Groups



Satisfaction is notably lower among customers who do not believe that Tillsonburg has a standard of reliability that meets expectations, is not delivering proactive communication, who were not satisfied with customer service, have a challenging time paying their bill, and have experienced issues (especially billing, others).

Top 2 Boxes: 'very + fairly satisfied'	Satisfaction Pre & Post										
	TOTAL	STANDARD OF RELIABILITY		PROACTIVE COMMUNICATION		RECENT CS EXPERIENCE		ABILITY TO PAY			
		Agree	Disagree	Agree	Disagree	Satisfied	Not	Not a worry	Sometimes a worry	Often a prob	Depends
PRE	94%	95%	63%	96%	75%	85%	56%	97%	92%	61%	93%
POST	95%	96%	52%	97%	73%	95%	44%	99%	92%	73%	97%

Base: total respondents

Top 2 Boxes: 'very + fairly satisfied'	Satisfaction Pre & Post						
	TOTAL	OUTAGE ISSUE		BILLING ISSUE		OTHER ISSUES	
		Yes	No	Yes	No	Yes	No
PRE	94%	91%	95%	66%	97%	83%	94%
POST	95%	96%	95%	71%	97%	62%	96%

Base: total respondents

Standardized Customer Satisfaction Index Scores



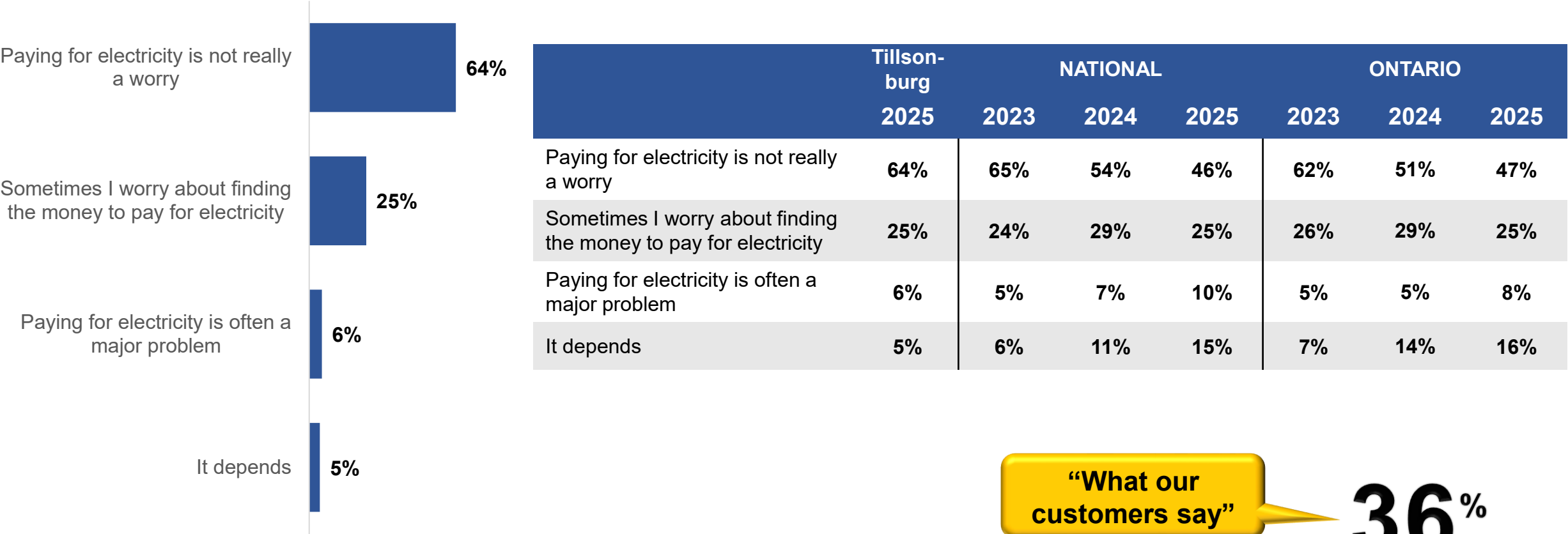
	ERTH Power 2025	kWh Group 1 2025	kWh Group 2 2025	kWh Group 3 2025	National 2025	Ontario 2025
Overall Satisfaction (0 to 1 point)	0.86	0.91	0.84	0.83	0.77	0.77
Power Quality and Reliability (0 to 1 point)	0.91	0.92	0.90	0.92	0.76	0.77
Billing and Payment (0 to 1 point)	0.85	0.90	0.84	0.84	0.77	0.77
Customer Service Experience (0 to 1 point)	0.66	0.60	0.69	0.65	0.68	0.69
Communications (0 to 1 point)	0.81	0.86	0.80	0.77	0.71	0.71
Price (0 to 1 point)	0.66	0.71	0.65	0.64	0.60	0.60
OVERALL SCORE	0.79	0.81	0.79	0.78	0.71	0.72

Standardized Customer Satisfaction Index Scores



	Total	IMPACT ON FINANCE						SECTOR CONFIDENCE					
		Agree NET	Agree strongly	Agree somewhat	Disagree NET	Disagree somewhat	Disagree strongly	Agree NET	Agree strongly	Agree somewhat	Disagree NET	Disagree somewhat	Disagree strongly
Overall Satisfaction (0 to 1 point)	0.86	0.82	0.77	0.84	0.92	0.95	0.88	0.87	0.94	0.83	0.71	0.60	0.78
Power Quality and Reliability (0 to 1 point)	0.91	0.89	0.88	0.90	0.94	0.96	0.92	0.92	0.98	0.88	0.75	0.61	0.84
Billing and Payment (0 to 1 point)	0.85	0.83	0.80	0.85	0.89	0.95	0.84	0.88	0.94	0.84	0.63	0.40	0.77
Customer Service Experience (0 to 1 point)	0.66	0.66	0.50	0.80	0.84	0.88	0.84	0.79	0.75	0.80	0.32	0.39	0.00
Communications (0 to 1 point)	0.81	0.78	0.75	0.80	0.86	0.91	0.81	0.83	0.89	0.79	0.60	0.42	0.69
Price (0 to 1 point)	0.66	0.59	0.54	0.63	0.76	0.81	0.72	0.69	0.80	0.62	0.41	0.23	0.52
OVERALL SCORE	0.79	0.76	0.71	0.80	0.87	0.91	0.84	0.83	0.88	0.79	0.57	0.44	0.60

Ability to Pay for Electricity



“What our customers say”

36%

Paying for electricity is at least
sometimes a worry

Base: total respondents



The cost of my electricity bill has a major impact on my finances and requires I do without some other important priorities			
	Tillsonburg	Ontario	
	2025	2024	2025
AGREE NET	59%	58%	54%
Agree strongly	23%	22%	18%
Agree somewhat	36%	36%	35%
Disagree somewhat	22%	29%	28%
Disagree strongly	19%	13%	19%
DISAGREE NET	41%	42%	46%

Base: total respondents with an opinion

“What our customers say”

59%

Agree the cost of electricity bill has a major impact on finances

Perceptions of Cost/Value



Cost/Value Attributes			
	Tillsonburg	National	Ontario
Provides good value for your money	78%	72%	72%
Cost of electricity is reasonable compared to other utilities	72%	71%	71%

Base: total respondents with an opinion



“What our customers say”

78%

“Provides good value for money...”

Financial Hardship by Ability to Pay



*THE COST OF MY ELECTRICITY BILL HAS A MAJOR IMPACT ON MY FINANCES
AND REQUIRES I DO WITHOUT SOME OTHER IMPORTANT PRIORITIES*

	FINANCIAL HARDSHIP				
	ABILITY TO PAY				
	TOTAL	Not a worry	Sometimes a worry	Often a problem	Depends
AGREE NET	59%	43%	92%	80%	77%
Agree strongly	23%	15%	39%	57%	20%
Agree somewhat	36%	29%	53%	23%	57%
Disagree somewhat	22%	28%	7%	20%	13%
Disagree strongly	19%	29%	1%	0%	10%
DISAGREE NET	41%	57%	8%	20%	23%

Base: total respondents with an opinion

“What our customers say”

80%

Agree the cost of electricity bill has a major impact on finances among those who often have problems paying

Problems/Issues Experienced by Ability to Pay



Those who worry about paying their bill and are experiencing financial hardships tend to perceive more issues, especially when it comes to billing. Brought on by a heightened sense of anxiety and trying to get value for their spending.

	Experienced Problem/Issue in Past 12 Months				
	ABILITY TO PAY				
	TOTAL	Not a worry	Sometimes a worry	Often a problem	Depends
Outages	26%	23%	33%	20%	47%
Billing	8%	4%	11%	42%	10%
Other Issues	4%	3%	5%	8%	3%

Base: total respondents

“What our customers say”

42%

“... Billing is an issue...” among those who often have trouble paying their bill

Perceptions of Cost/Value by Ability to Pay



Cost/Value Attributes	ABILITY TO PAY				
	TOTAL	Not a worry	Sometimes a worry	Often a problem	Depends
Provides good value for your money	78%	85%	69%	57%	71%
Cost of electricity is reasonable compared to other utilities	72%	80%	60%	55%	62%

Base: total respondents with an opinion

“What our customers say”

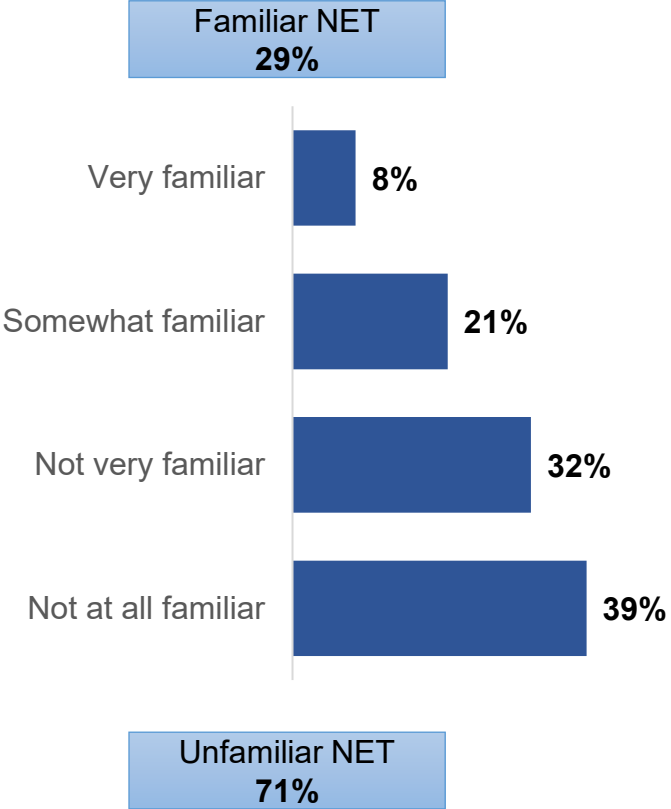
57%

Who often have a problem paying for electricity feel they are “getting good value”

Familiarity With How Bill Costs are Distributed



Most are not familiar that Tillsonburg Hydro is responsible for collecting payment for the entire electricity bill, they retain only about 25% and the rest of the bill goes to power generation companies, transmission companies, the provincial government and regulatory agencies.

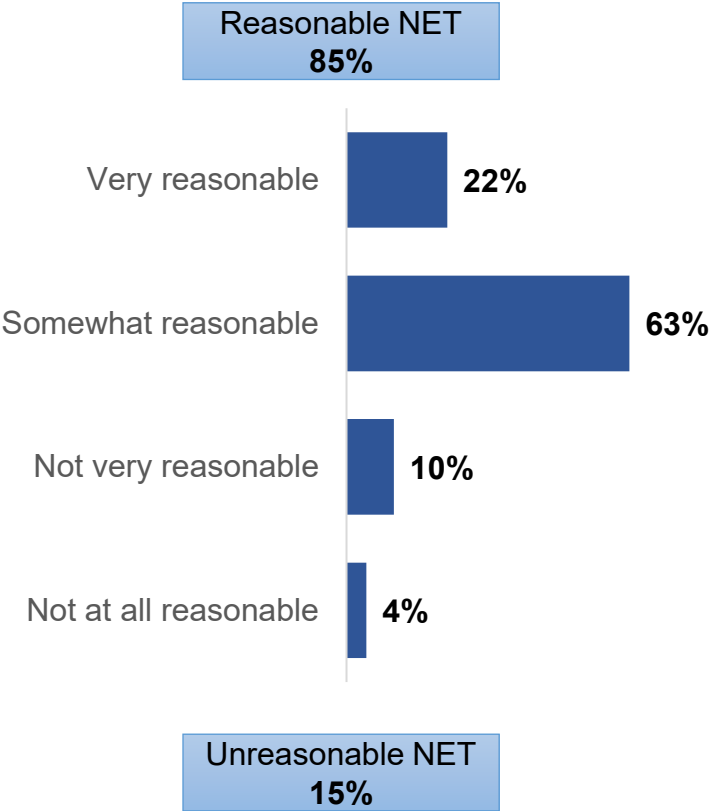


Base: total respondents with an opinion

Perceived Reasonability That 25% Goes to Tillsonburg



Most think it is reasonable that 25% of their bill goes to Tillsonburg Hydro.

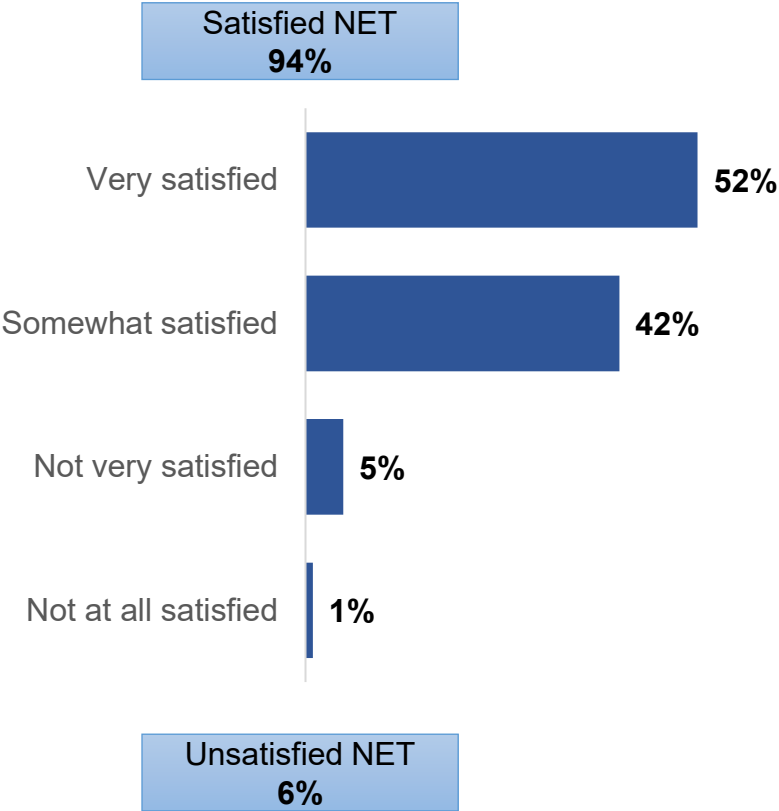


Base: total respondents with an opinion

Satisfaction with Electrical Service Communications



Almost all are satisfied with the communications they receive from Tillsonburg Hydro related to their electrical service.



Base: total respondents with an opinion

Frequency of Performing Energy-Saving Activities



Most frequently run the washing machine only when there is a full load of laundry. There is a high tendency of turning off electronic devices completely and choosing different washer programs depending on laundry dirtiness. Fewer are washing their laundry using a temperature of 30 degrees on a more regular basis or choosing a different program for their dishwashers.

	NATIONAL						ONTARIO					
	Ever NET	Always	Often	Some-times	Rarely	Never/ N/A	Ever NET	Always	Often	Some-times	Rarely	Never/ N/A
Run the washing machine only when there is a full load of laundry	96%	45%	28%	17%	6%	4%	95%	46%	27%	17%	6%	5%
Completely turn off electronic devices (e.g., TV, computer) – no standby mode	89%	28%	25%	22%	13%	11%	88%	25%	26%	23%	14%	12%
Choose a different program for your washer depending on the level of dirtiness of your laundry	86%	27%	25%	24%	10%	14%	85%	26%	26%	25%	9%	15%
Wash laundry using a temperature of 30 degrees	85%	20%	24%	25%	16%	15%	86%	18%	26%	26%	16%	14%
Choose a different program for your dishwasher depending on the level of dirtiness of your dishes	68%	18%	16%	21%	13%	32%	69%	18%	18%	20%	13%	31%

Base: total National and Ontario Benchmark respondents with an opinion

Perceptions of Energy Consumption



Customers are aware of how they can reduce their electricity consumption, but it is not top of mind for everyone. The vast majority agree that too many families are thinking about whether they can heat their homes or buy food. Most believe that the prices for electricity are rising too quickly.

Energy Consumption Attributes		
	National	Ontario
Top 2 Box: Agree Strongly/Somewhat	2025	2025
You are aware of ways to reduce your electricity consumption	91%	93%
Too many families have to think about whether they can heat their home or put food on the table	85%	84%
The prices for electricity continue to rise too quickly	83%	83%
High electricity consumption negatively impacts the environment	80%	79%
You think about reducing your energy consumption all the time	79%	79%
Those who live in rural areas are more disadvantaged when it comes to energy distribution	79%	82%
You track and monitor your personal electricity consumption	66%	66%

Base: total National and Ontario Benchmark respondents with an opinion



Energy Concerns



There isn't very high concern about energy conservation, the age of the grid, reliable electricity or safe delivery of electricity to homes.

Energy Concerns		
	National	Ontario
Top 2 Box: Extremely/Very concerned	2025	2025
Energy conservation	46%	49%
Integrity/Age of energy grid	41%	45%
Reliable electricity in your community	40%	42%
Safety/Security of the delivery of electricity to your home	36%	36%

Base: total National and Ontario Benchmark respondents with an opinion

“What our customers say”

49%

“Energy conservation is concerning...” among Ontario benchmark customers

Concerns About Issues Affecting Utility



Many believe that rising prices/affordability are issues impacting their electric utilities. Many are also concerned about scams targeting customers. Reliability, distribution system vulnerability, and a lack of clean energy are less concerning issues to customers.

Concerns About Issues Affecting Utility		
	National	Ontario
Top 2 Box: Extremely/Very concerned	2025	2025
Rising prices/Affordability	63%	64%
Scams targeting customers	50%	55%
Ability of the province to generate more power	39%	39%
Decreasing reliability due to increasing demand	39%	40%
Vulnerability of the distribution system	38%	40%
A lack of clean energy	37%	41%

Base: total National and Ontario Benchmark respondents with an opinion

“What our customers say”

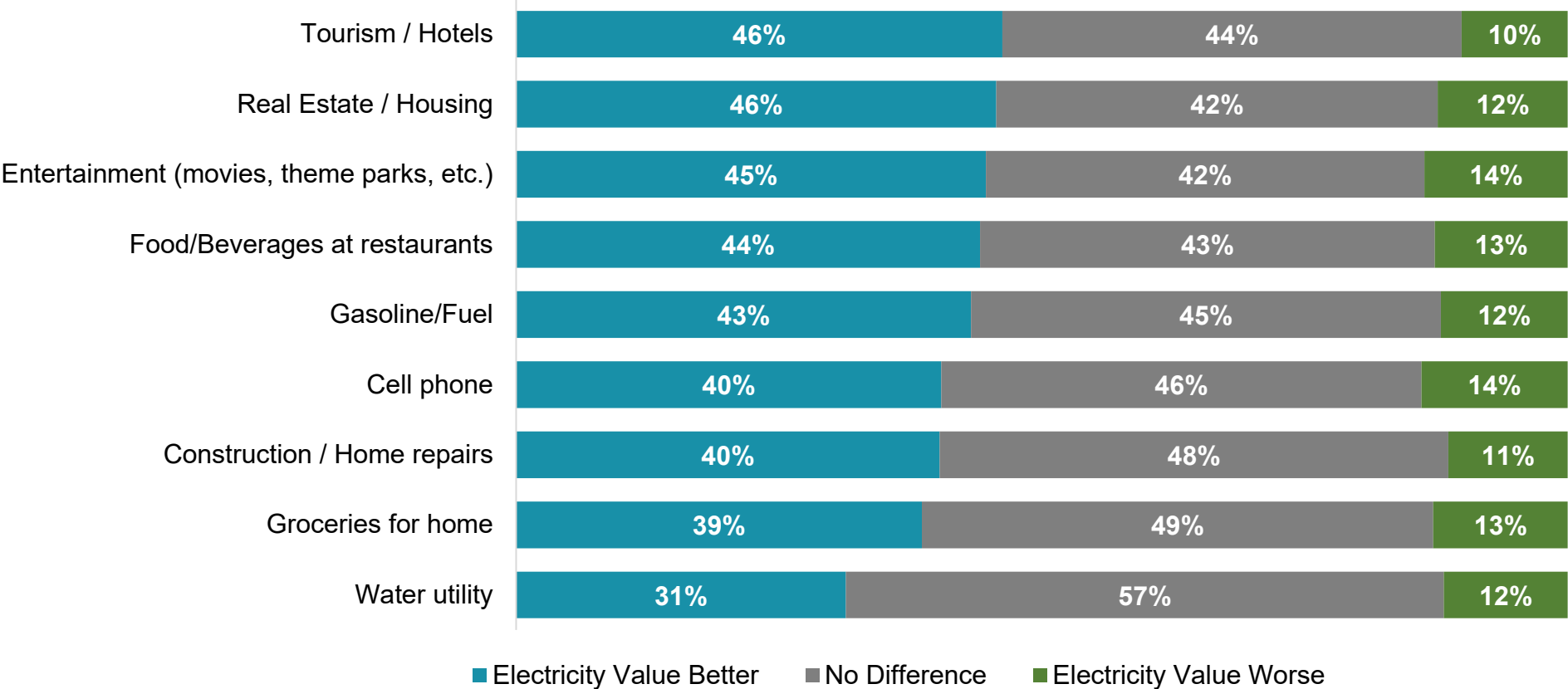
64%

“Rising prices/Affordability is concerning...”
among Ontario benchmark customers

Value Perceptions in Other Industries Versus Electricity



For the most part, electricity consumers either see the value provided by their electricity utility as better or about the same as other industries.



Base: total National Benchmark respondents with an opinion

“What our customers say”

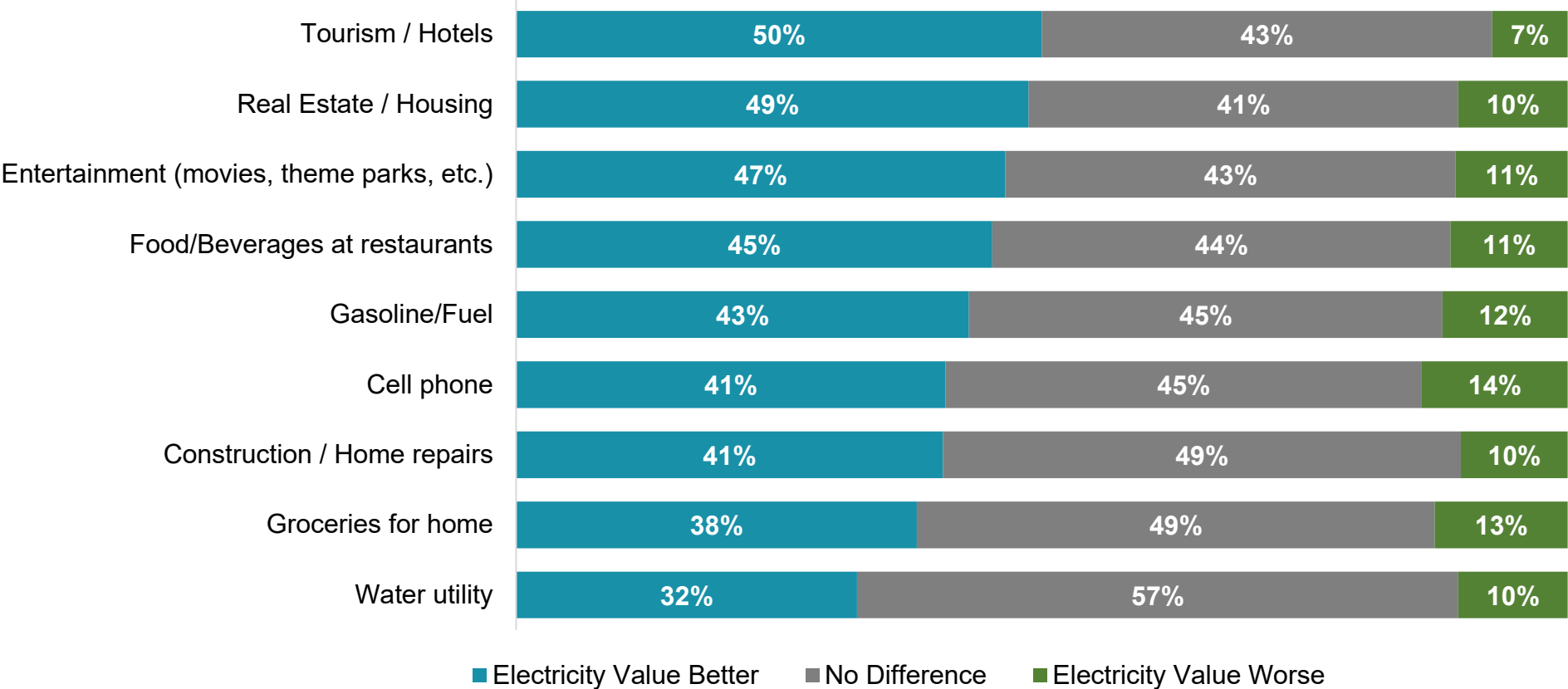
46%

“Electricity value better than real estate...”
among National benchmark customers

Value Perceptions in Other Industries Versus Electricity



For the most part, electricity consumers either see the value provided by their electricity utility as better or about the same as other industries.



Base: total Ontario Benchmark respondents with an opinion

“What our customers say”

49%

“Electricity value better than real estate...”
among Ontario benchmark customers

Summary



- Delivering reliable electricity continues to be a core expectation for customers. Customers are not willing to have multiple outages. Satisfaction is lower among those who disagree that Tillsonburg has a standard of reliability that meets their expectations. Credibility and trust ratings as well as overall satisfaction are notably weaker among those who experienced various issues.
- Maintaining strong customer service levels remains critical; those who were not satisfied with their experience are much more likely to express dissatisfaction with Tillsonburg.
- Encouragingly, most key metrics (core operational attributes, core customer service quality attributes, and cost/value attributes) for Tillsonburg are stronger than National and Ontario benchmarks. Customer effort, experience, and engagement are strongly linked to customer service impressions as well as Tillsonburg's ability to be proactive with communications.
- Electricity consumers believe the price of electricity is rising too quickly and many families have to think about whether they can heat their homes or put food on the table. Affordability is a concern for most.
- It is not surprising that many report that paying for electricity is at least sometimes a worry; however, among those who are experiencing financial hardships, the ability to pay is a concern for the vast majority. This vulnerable segment of customers is more anxious and more worried about their finances. As a result, their sense of value and where their money is being spent is exacerbated. Thus, they tend to perceive more issues with Tillsonburg, especially when it comes to billing.
- These negative perceptions are not unique to electricity providers as stresses caused by an inability to pay lead to frustrations. This segment desires a strong ROI on anything they spend and this survey provided an opportunity to vent about their frustrations.
- A majority believe that customers are well served by the electricity system in Ontario; credibility and trust ratings are notably lower among those who disagree with this notion, however.
- Most are not familiar that Tillsonburg Hydro is responsible for collecting payment for the entire electricity bill yet retains only about 25% and the rest of the bill goes to power generation companies, transmission companies, the provincial government and regulatory agencies. Most think it is reasonable that 25% of their bill goes to Tillsonburg Hydro.
- Almost all are satisfied with the communications they receive from Tillsonburg Hydro related to their electrical service.



UtilityPULSE

Electric Utility Customer Satisfaction Survey

Numbers at a Glance



	Tillsonburg	National	Ontario
	2025	2025	2025
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Customer Centric Engagement Index (CCEI)	88%	77%	77%
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Electric Utility Customer Satisfaction Survey

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