

PORTLAND WATER BUREAU 2016 CUSTOMER SURVEY—HIGHLIGHTS OF RESULTS FOR THE PORTLAND UTILITY BOARD

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Today's Presentation

- Survey Purpose and Method
- General Response Rate
- Highlights of Key Results
- Water Bureau Next Steps

Survey Purpose and Method

- **Purpose**

- Gather **customer attitudes and opinions** on topics related to **PWB's Key Service Levels**.

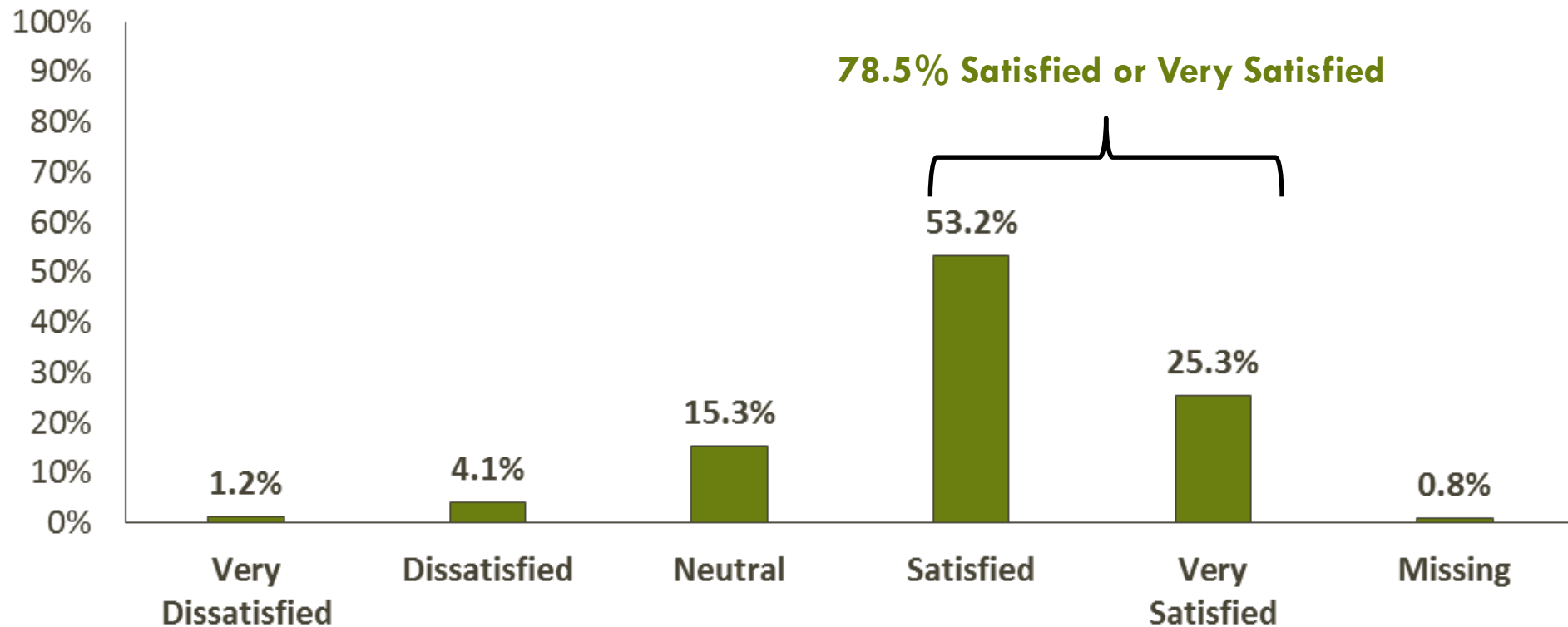
- **Method**

- **Online survey** with an option to fill out a paper version offered to single- and multi-family residential retail customers.
- In English, Spanish, Russian, Chinese, and Vietnamese.
- May – July 2016

General Response Rate

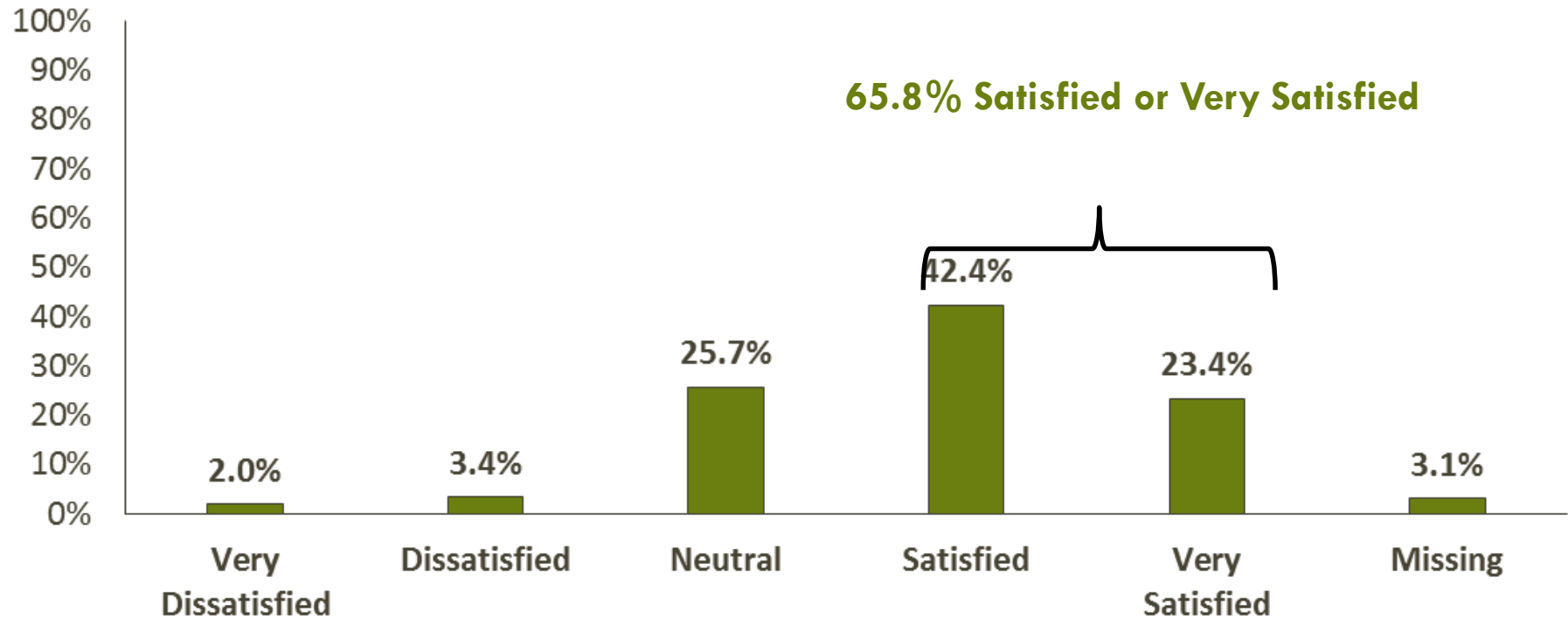
- Total number invited to participate: 5,800
- Total number of complete surveys: **859**
- Sampling error: $\pm 3.34\%$
- Findings from the survey can be confidently generalized to the PWB customer population.
- Results were **weighted** on certain characteristics to **more closely reflect** the distribution in the population of **PWB customers**:
 - **Geography**
 - **Age**
 - **Household Income**

Overall Satisfaction



Q20: Overall, how would you rate your satisfaction with the Portland Water Bureau services?
Unweighted N = 859

Customer Service Satisfaction



If Yes to Q6: Have you ever personally called Customer Service at the Portland Water Bureau?

Q6a: Overall, how satisfied were you with the quality of service you received when you last called the Portland Water Bureau?

Unweighted n = 335

Top Reasons for Dissatisfaction

- **Charges, Payment or Rate Issues—approximately 9 responses**
 - The online payment system just went away.
 - Very angry at increases in rates every year.
 - They over-charged me but did not give a good reason.

- **Lack of or Slow Resolution/Response—approximately 7 responses**
 - It took forever for a proper response.
 - A follow-up with a technician/engineer was promised...this never happened.

Communications

- **Preferences for General Communications**
 - Newsletter with Bill 62.6%
 - Posting on PWB Website 16.7%
 - Email 10.1%
 - Social Media 6.1%
- **Advance Notice for Planned Outage**
 - How Notified During Last Outage—**Door Hanger 78%**
 - How Prefer to be Notified:
 - Automated Text Message—24.8%
 - Email—21.3%
 - Printed Notice in the Mail 20.8%
 - **Door Hanger 19.8%**

Outages

- **Planned Outages**

- 87.0% of those who had experienced planned outages thought the amount of advance notice was **reasonable**.
- Most manageable time frame to be without water is **4 hours** or less (mean score 4.28)

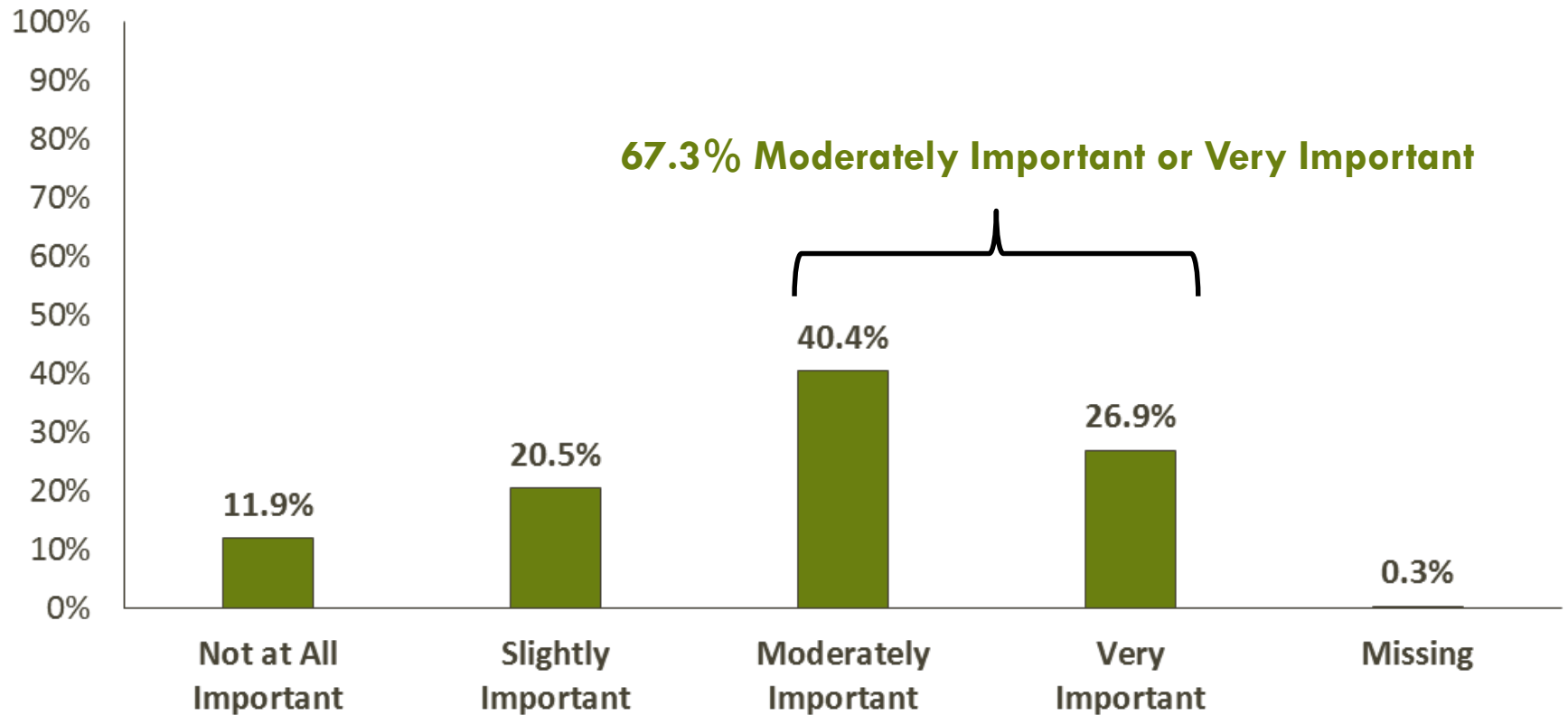
- **Unplanned Outages**

- 74.8% said **8 hours** for an unplanned outage is **reasonable**.

If they thought 8 hours was too long, we asked what would be an acceptable time to be without water.

- 77.9% said **4 to 8 hours** was **acceptable**.

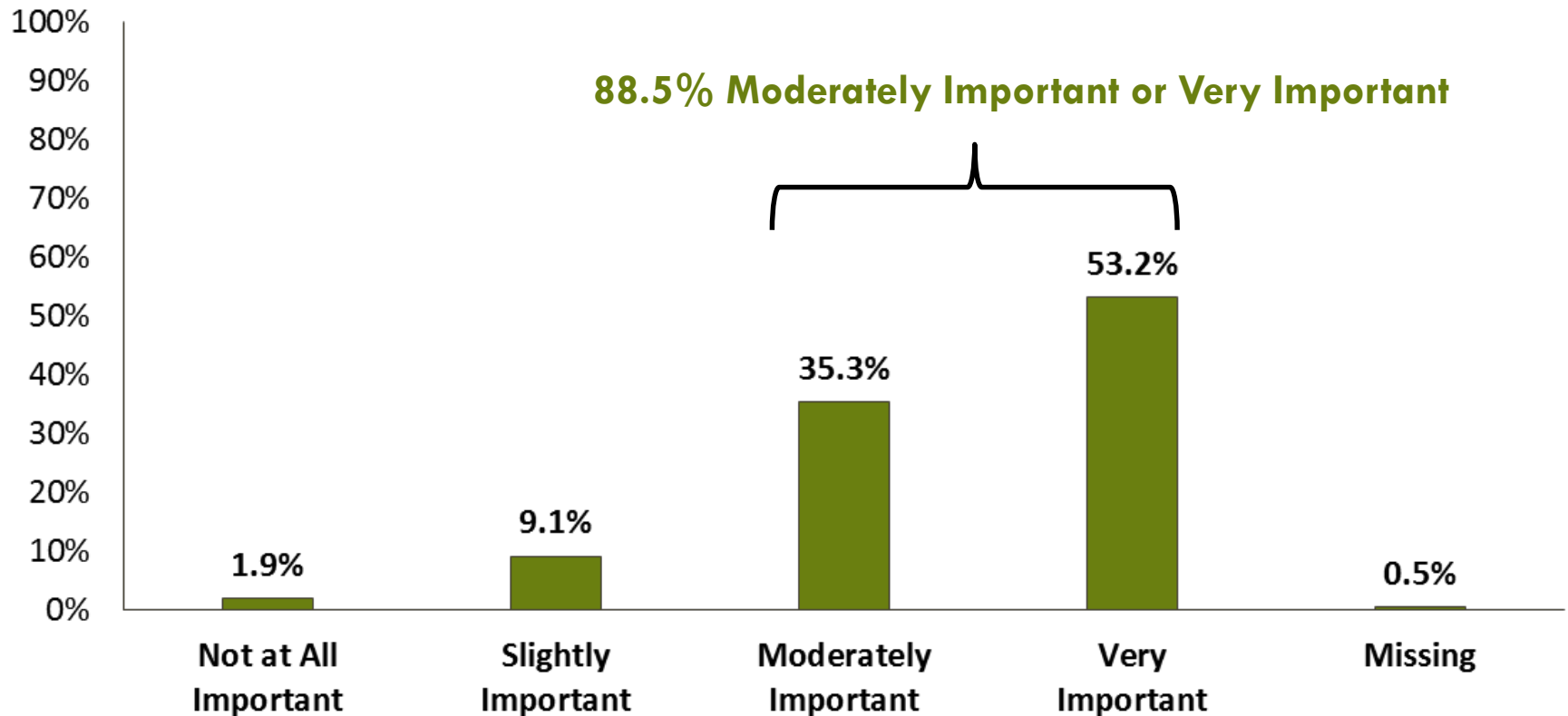
Investment in Automated Meters



Q5: How important is it to you that the Portland Water Bureau invests customer dollars in automated meters?

Unweighted N = 859

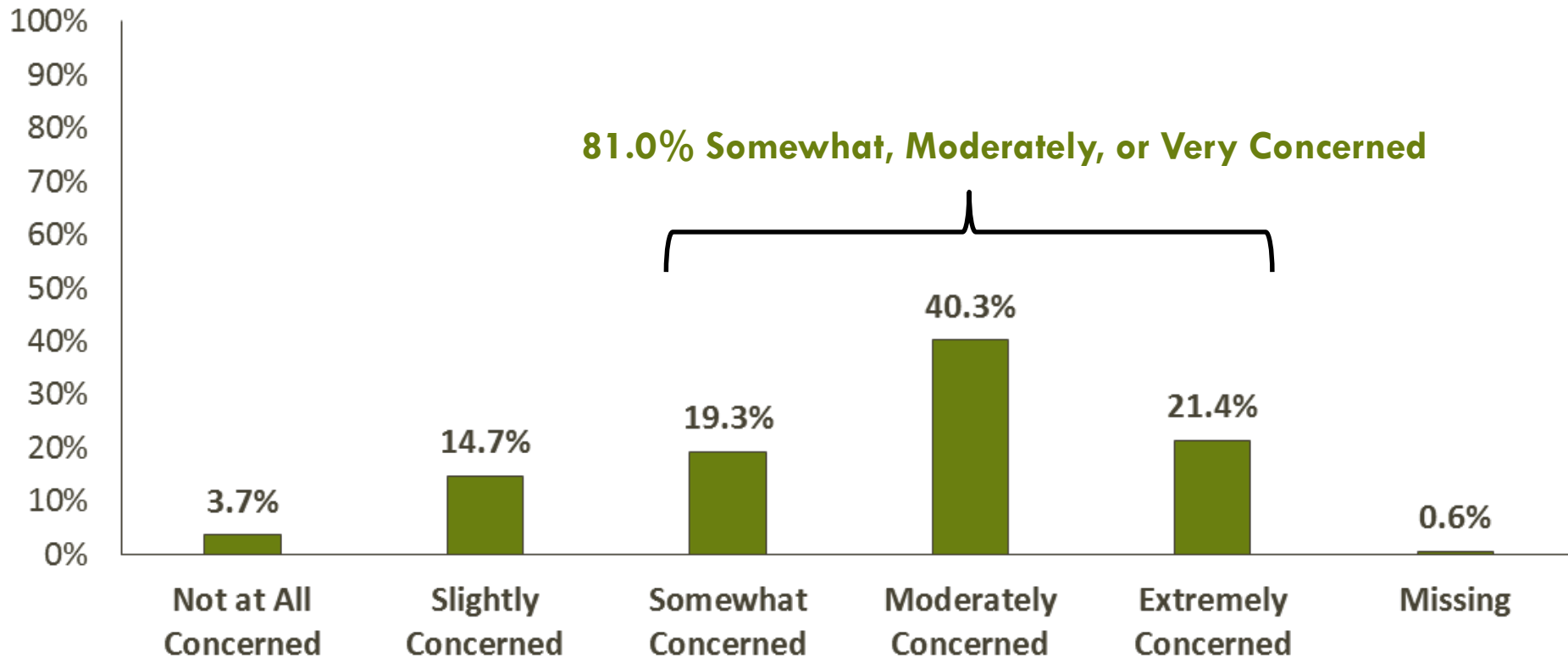
Investment in Earthquake Preparedness



Q15: How important is it to you that the Portland Water Bureau invests customer dollars in water-system improvements to prepare for a major earthquake?

Unweighted N = 859

Concern about a Major Earthquake



Q16: In general, how concerned are you about a major earthquake affecting the City of Portland?

Unweighted N = 859

Water-Drinking Behaviors

- 78.5% Never or rarely drink bottled water
- 49.8% Never or rarely drink filtered tap water
- Relatively low levels of concern for water quality expressed. About 10%, or 25 comments, about water quality or safety, including 5 remarks about lead and 6 remarks about fluoride.

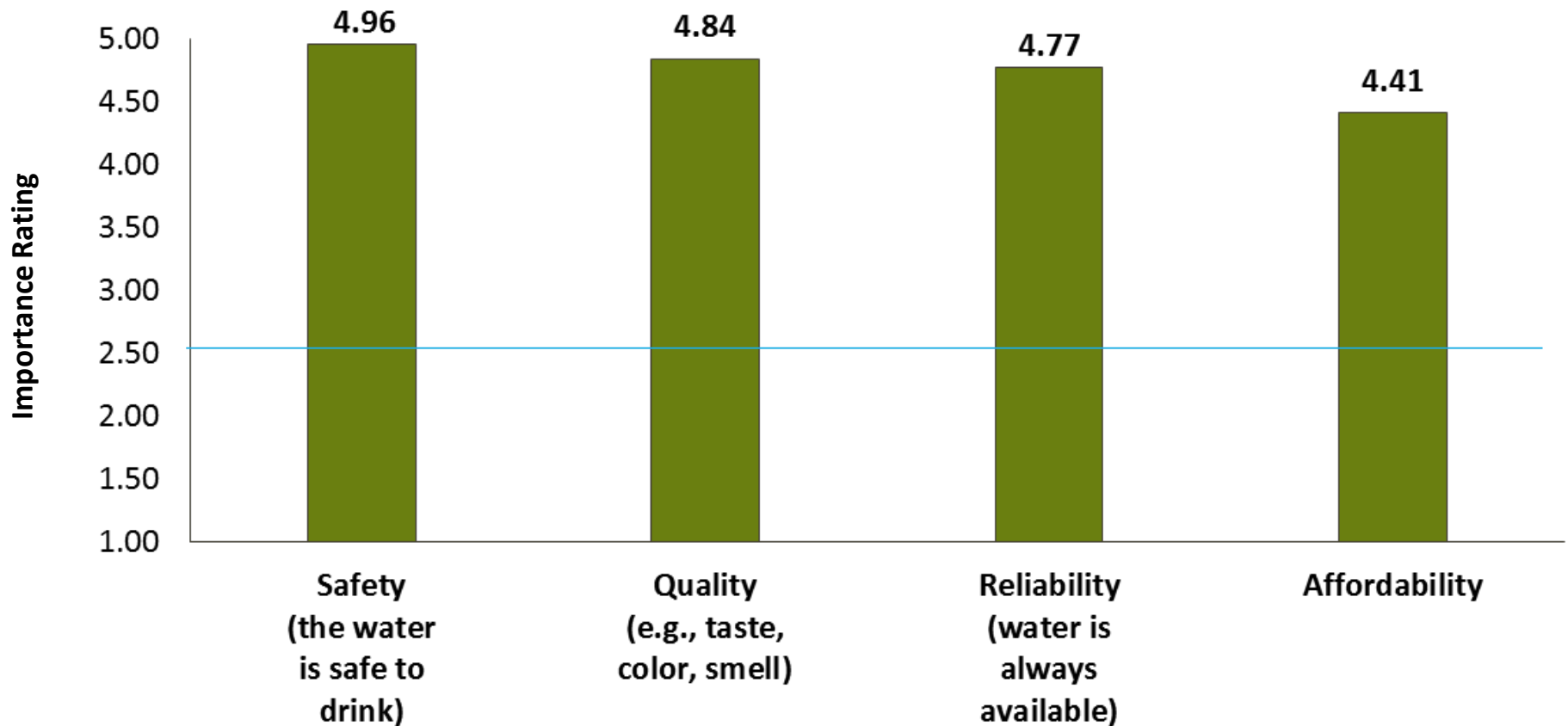
Q17: The next items are about the water-drinking behavior of members of your household while at home. How often do members of your household drink bottled water that was purchased?

Q18: How often do members of your household drink filtered water (for example, a filter directly on a faucet or in the refrigerator, or a filter built into a water container)?

Q19: How often do members of your household drink tap water without using a filter?

Unweighted N = 859 for all three

Importance of Values Related to Water



Q2: Please rate how important each of the following values is to you when thinking about your drinking water. (Importance 1-5; 1=Not Important at All, 5=Very Important)

Q2.1: Quality (for example, taste, color, smell)

Q2.2: Safety (the water is safe to drink)

Q2.3: Affordability

Q2.4: Reliability (water is always available)

Unweighted N = 859

Final Comments

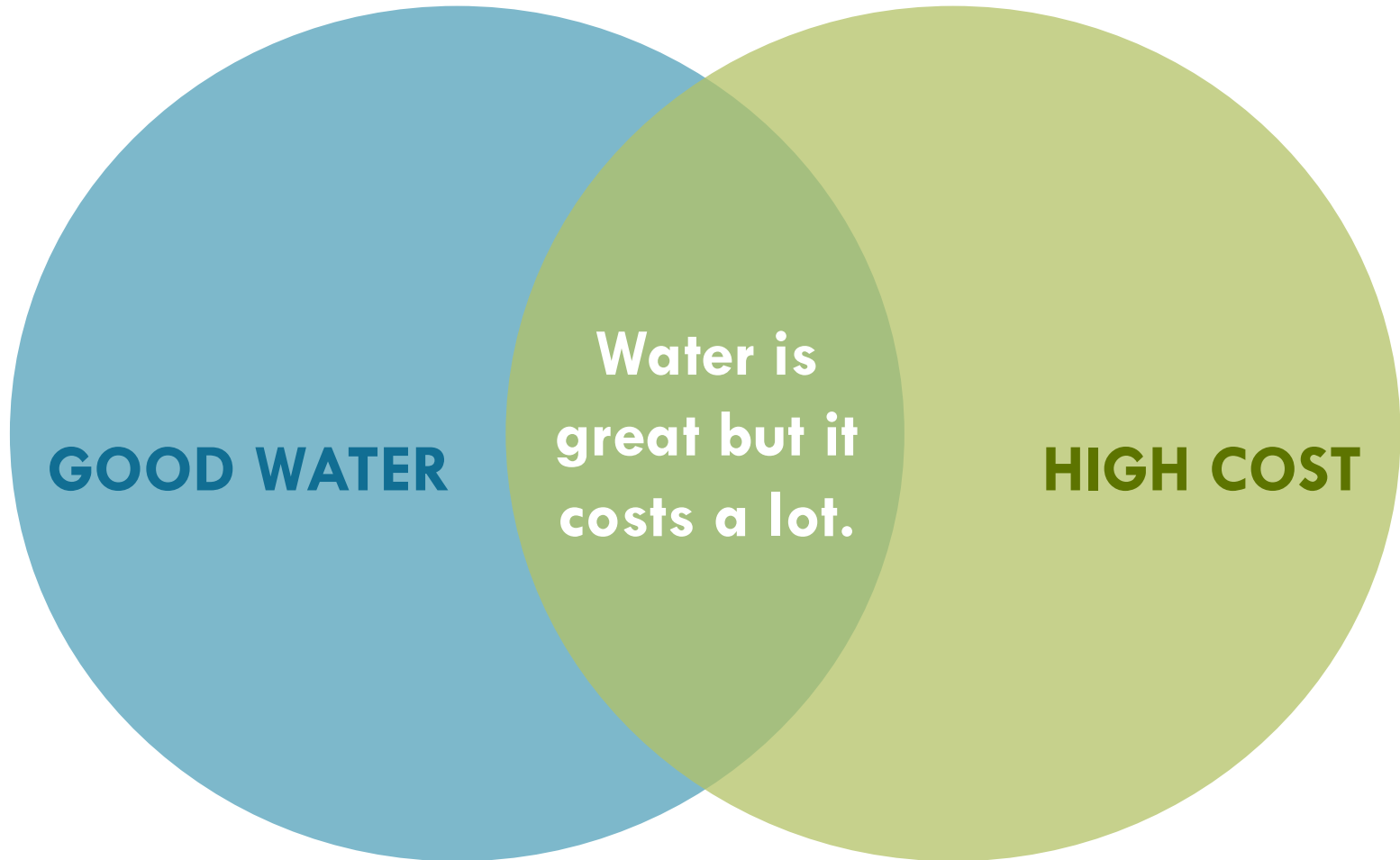
- At the end of the survey, respondents were asked if there was anything else they would like to share with the Water Bureau.
- A little **less than a third** of respondents (30.6 percent or 285 people) provided comments.
- Some respondents provided several comments, **each different comment was coded and counted separately.**

Q34: In the space below, please provide any other information you would like to share with the Portland Water Bureau.

Unweighted n = 285 respondents providing comments

Unweighted n = 859 all respondents

One Comment May Fit in Multiple Categories



Overall Comments by Category	Percentage of Those Who Commented	Percentage of all Respondents
High Costs/Rates, Sewer Costs, Differential Rates for Customers Who Reduce/Conserve Use	38.4%	11.7%
Concerns about PWB Fiscal Management, Rate Increases Should Only Pertain to Water	18.3%	5.6%
Billing Issues, Bring Back Autopay, Offer Monthly Payment Option, Credit Card Payment Option	13.1%	4.0%
Good Service Provision, Happy with Assistance Received	13.1%	4.0%
Great Water Quality	11.3%	3.4%
Concerns about Water Safety, Contaminants, or Added Chemicals (e.g., lead, chlorine, fluoride)	9.9%	3.0%
Poor Quality Water, Water Pressure Issues, Old Pipes	9.1%	2.8%
More Transparency from PWB, Less Politics/Corruption, Greater Integrity to Offset Bad Reputation	8.7%	2.7%
Increase Disaster Preparedness, Focus on Environmental Improvement, Cover Reservoirs	6.2%	1.9%
Poor Customer Service, Poor Notification	5.0%	1.5%
Leave Reservoirs Alone	2.9%	0.9%
Fluoridate the Water	2.4%	0.7%
Other	6.3%	1.9%

Concerns As Percentage of All Comments

- **Water, sewer, or water and sewer costs are high or are high compared to other areas of the country—31% of all comments**
- **Concerned about water or sewer funds used for bike paths, bioswales, or Portland loo, or “pet projects”—11% of all comments**
- **Credibility concerns—2% of all comments**
- **Request more information on how rate increases benefit customers—1% of all comments**
- **Request to better understand priorities for investment—1% of all comments**

Water Bureau Next Steps

- Sharing detailed results with departments such as Customer Service, Engineering, Water Quality.
- Audit of Key Service Levels, including:
 - Review of 500+ service levels from 16 best-practice leaders—completed.
 - Review of asset management plans for suggested service levels—in process.
 - Application of SMART criteria (strategic, measurable, achievable, realistic, time-bound) to service levels—in process.
 - Check for alignment with strategic objectives as strategic plan develops—to be done.
 - Incorporate customer feedback from survey—to be done.
- With Finance, develop recommendations for improvements for service levels and performance reporting to share with bureau leaders.

Your Questions

