

PORTLAND WATER BUREAU 2016 CUSTOMER SURVEY RESULTS

Debi Elliott, PhD
Portland State University
Survey Research Lab
November 15, 2016

Today's Presentation

- Survey Purpose and Method
- Number of Responses
- Demographics of Respondents
- Explanation of Weighting
- Survey Results

Survey Purpose and Method

- **Purpose**

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

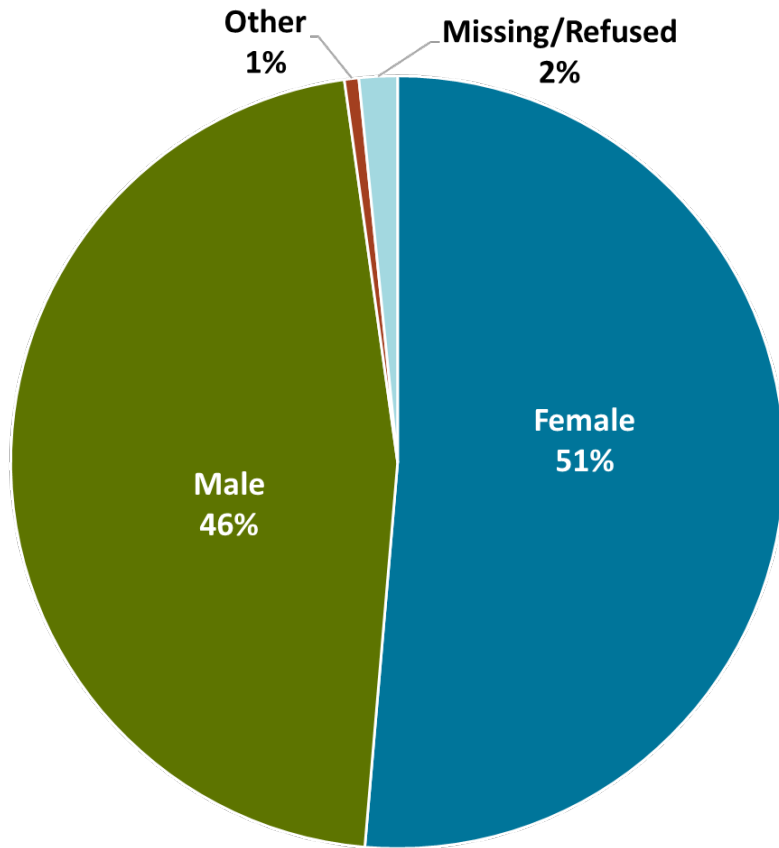
- **Method**

- **Online** survey with an option to fill out a **paper** version.
- Offered to **single- and multi-family residential retail** customers.
- Offered in **English, Spanish, Russian, Chinese, and Vietnamese**.

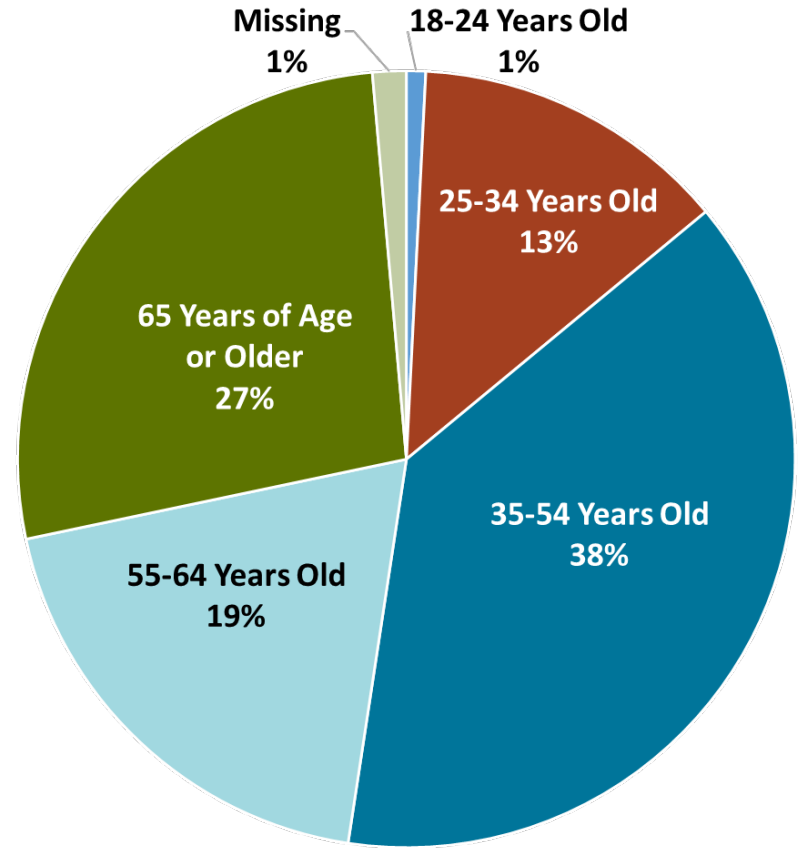
General Response

- Total number invited to participate: 5,800
- Target number of surveys: 384
- Total number of complete surveys: **859**
- Response Rate: 15.6%
- Sampling error: $\pm 3.34\%$
- Findings from the survey can be confidently generalized to the PWB customer population as a whole.

Gender and Age of Respondents

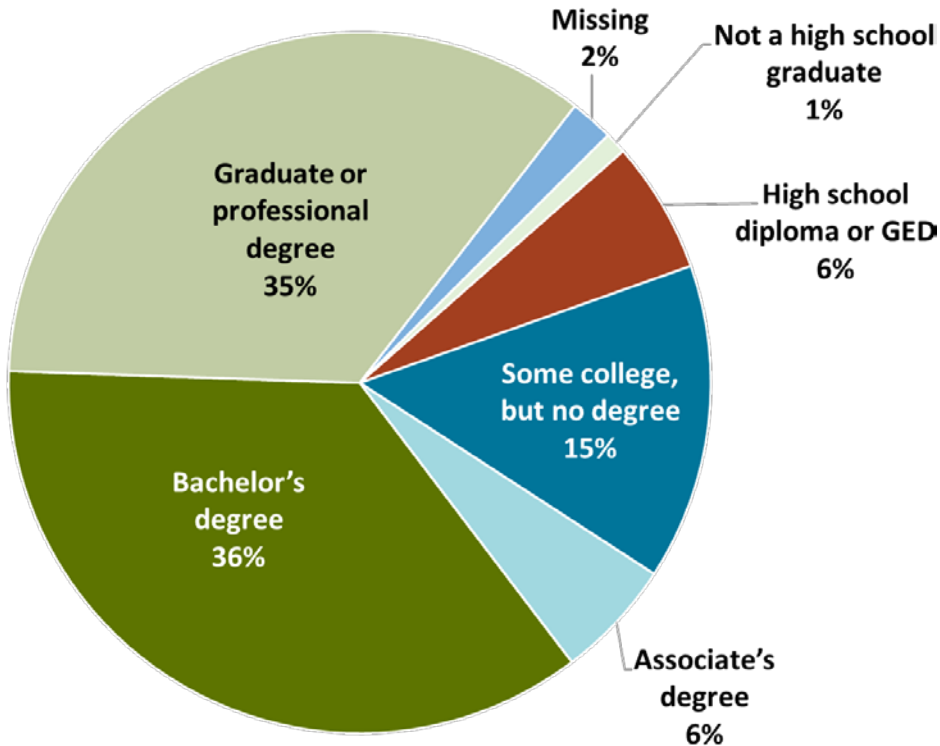


Gender

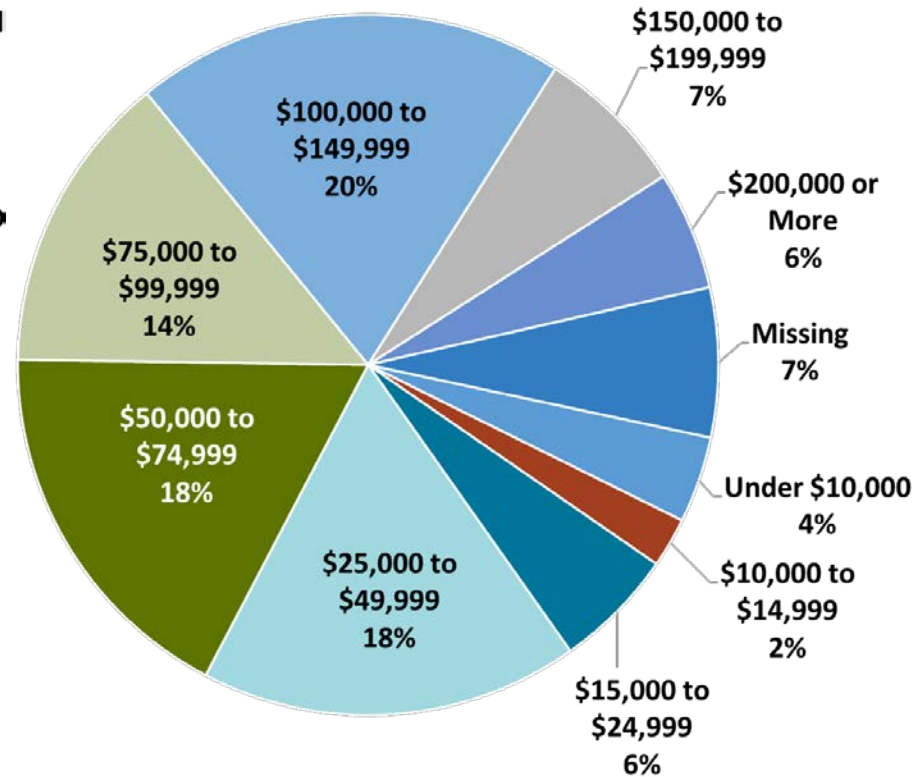


Age

Education and Household Income

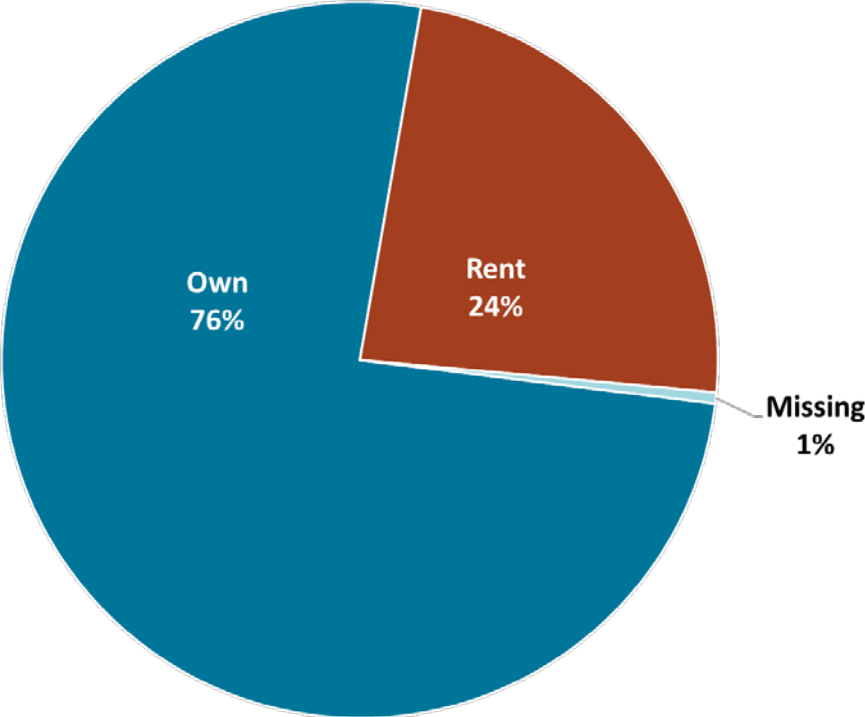


Education

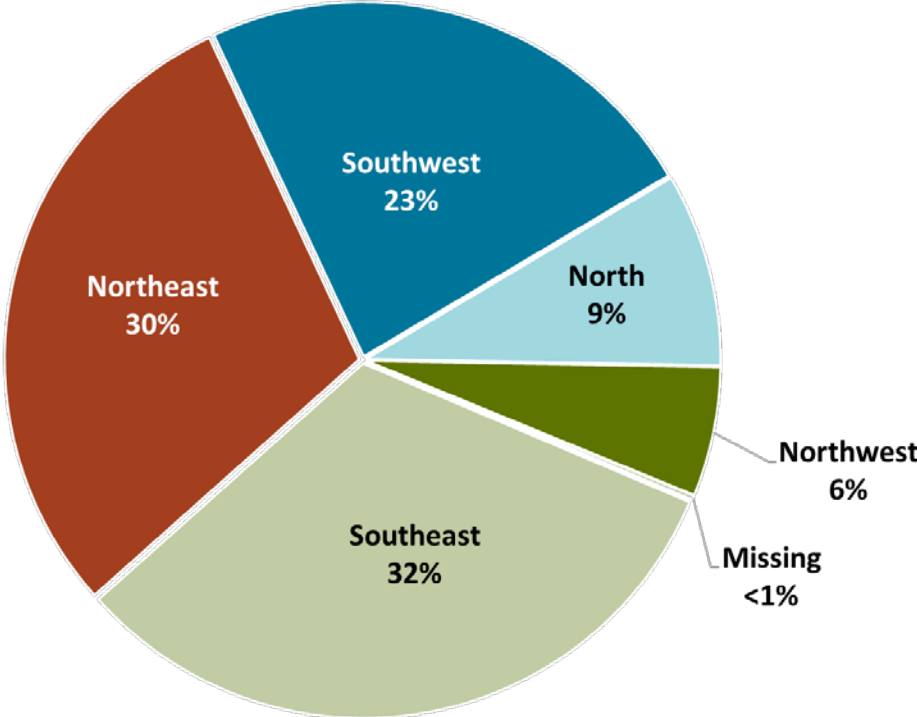


Household Income

Home Ownership and Geographic Area

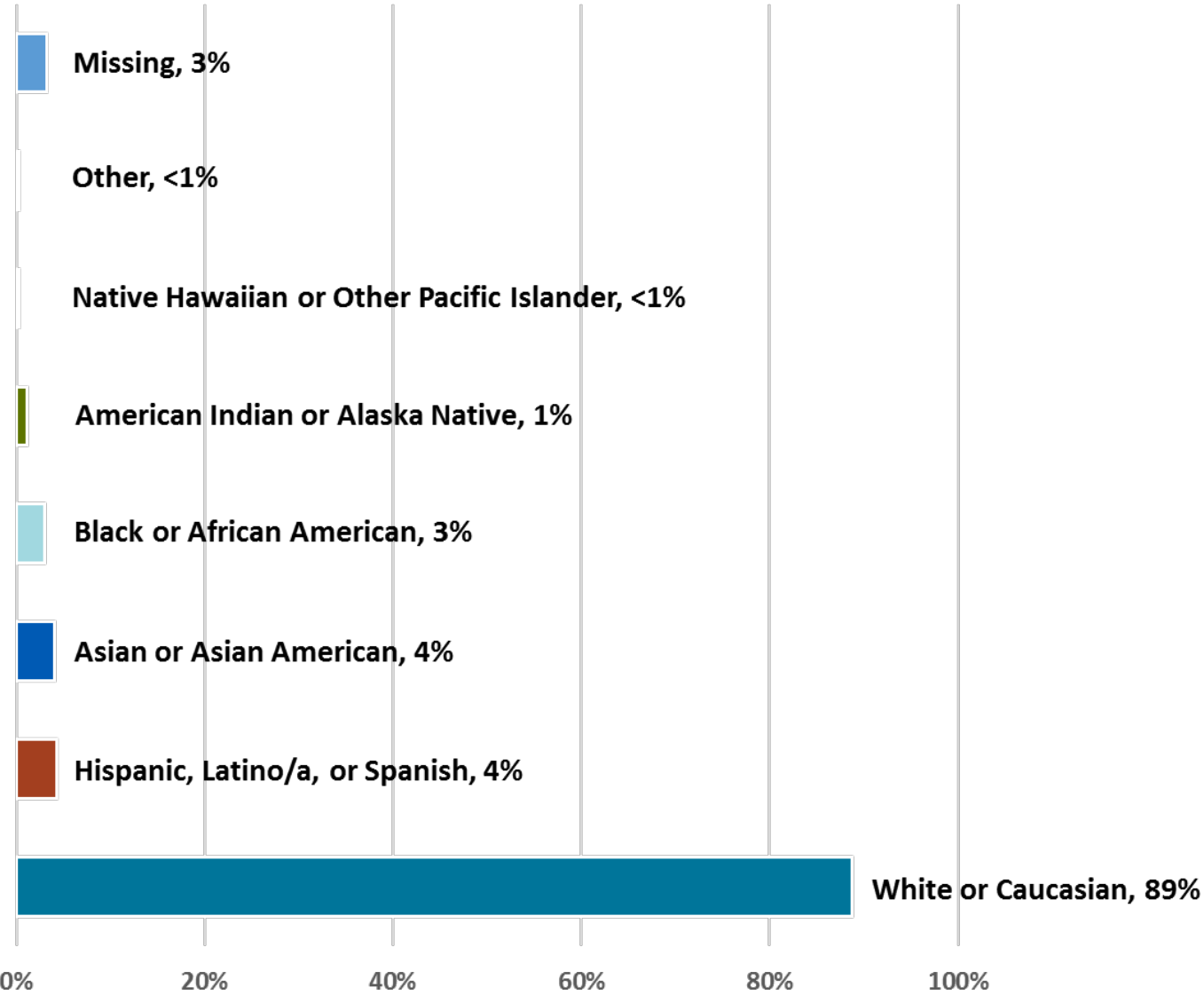


Home Ownership



Geographic Area

Race and Ethnicity

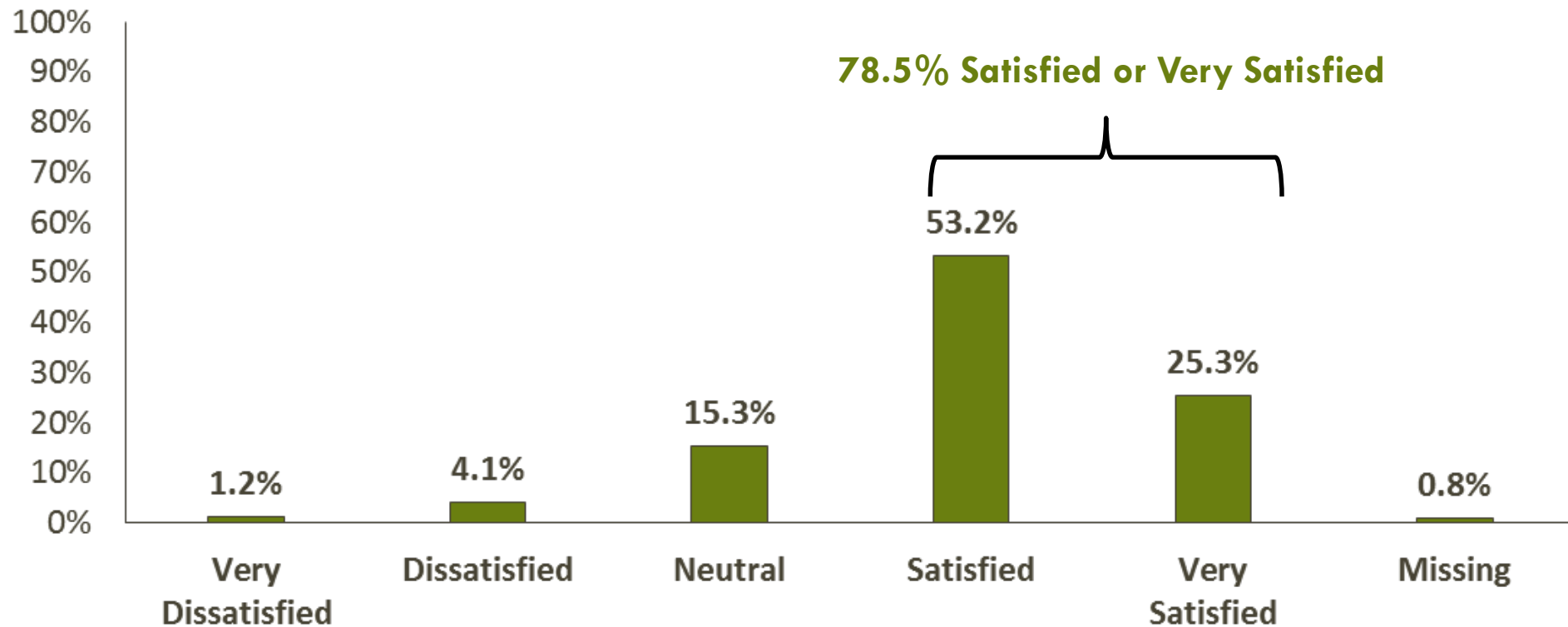


Respondents had the option of checking multiple boxes.

Weighting Responses

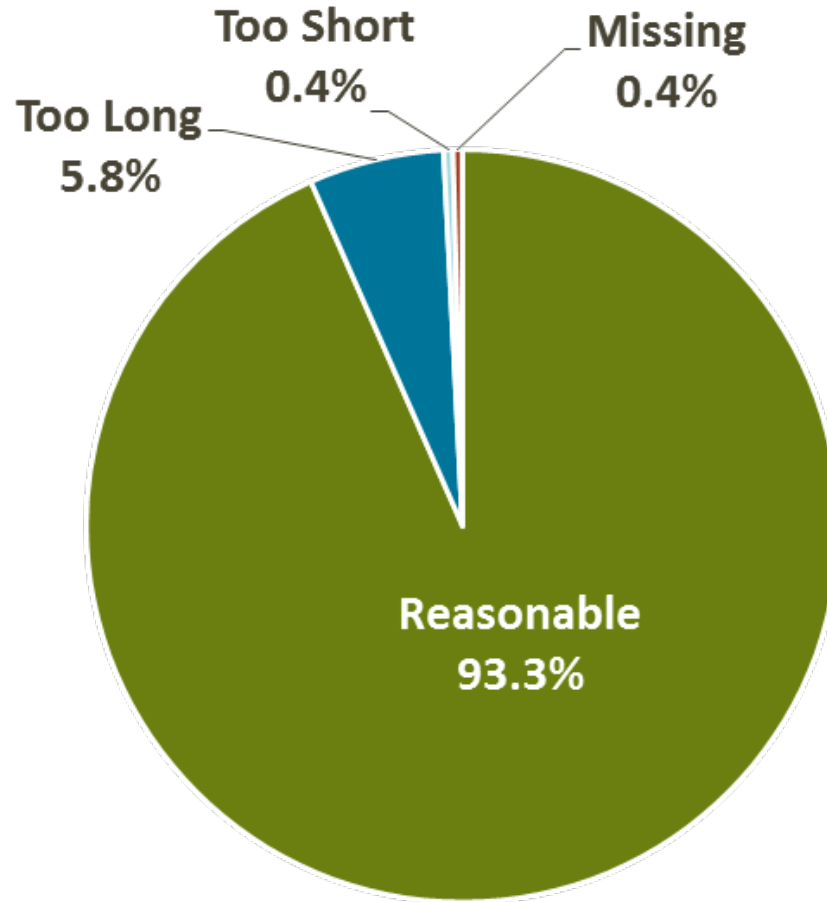
- Statistical weighting was used to adjust the proportion of respondents in the survey sample to **more closely reflect** the distribution in the population of **PWB customers**.
- Results in the report were **weighted** on certain characteristics:
 - **Geography**
 - **Age**
 - **Household Income**

Overall Satisfaction



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

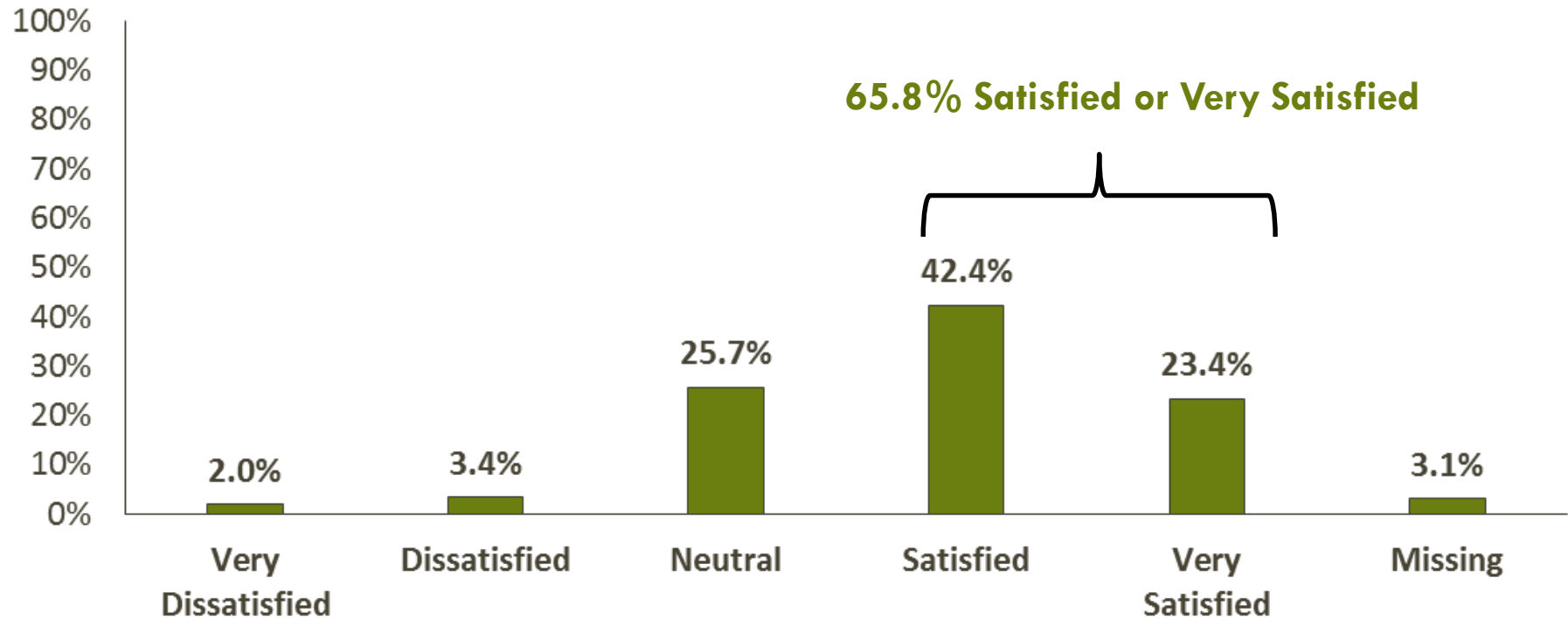
Customer Service: Call Hold Time



Q3: The Portland Water Bureau's Customer Service average call hold time is currently 2 minutes or less. Do you think that is too short, reasonable, or too long?

Unweighted N = 859

Customer Service Satisfaction



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

Unweighted n = 335

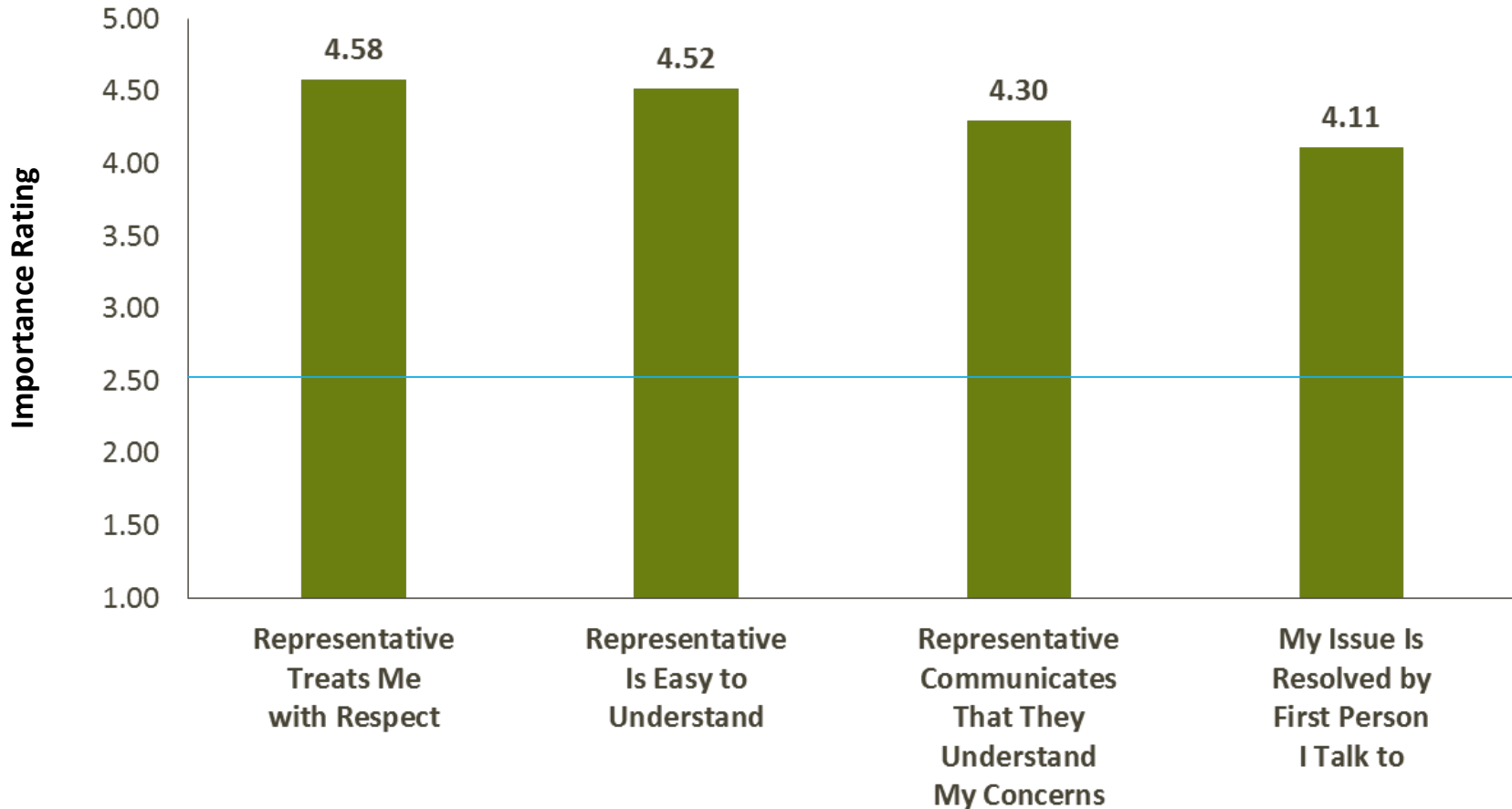
Reasons for Dissatisfaction

| Reason [presented in descending order of percentage] | Percent of Dissatisfied Customers | Percent of Customers Who Called |
|--|-----------------------------------|---------------------------------|
| Charges, Payment or Rate Issues | 39.6% | 2.1% |
| Lack of or Slow Resolution/Response | 32.6% | 1.8% |
| Not Helpful, Poor Communication | 18.5% | 1.0% |
| Long Wait/Hold Time | 15.4% | 0.8% |
| Meter Issues | 12.7% | 0.7% |
| Lack of Knowledge (person answering customer service call) | 12.2% | 0.7% |
| Leak Issues | 5.7% | 0.3% |
| Other | 31.1% | 1.7% |

Q6b: Why were not satisfied? [answered if Q6a=Dissatisfied or Very Dissatisfied]

Unweighted n = 24 Very Dissatisfied or Dissatisfied Customers

Importance of Factors Affecting Satisfaction with Customer Service



Q7: Please rate how important each of the following would be to your satisfaction when calling Portland Water Bureau Customer Service. (Importance 1-5; 1=Not Important at All, 5=Very Important)

Q7.1: My issue is resolved by the first person I talk to

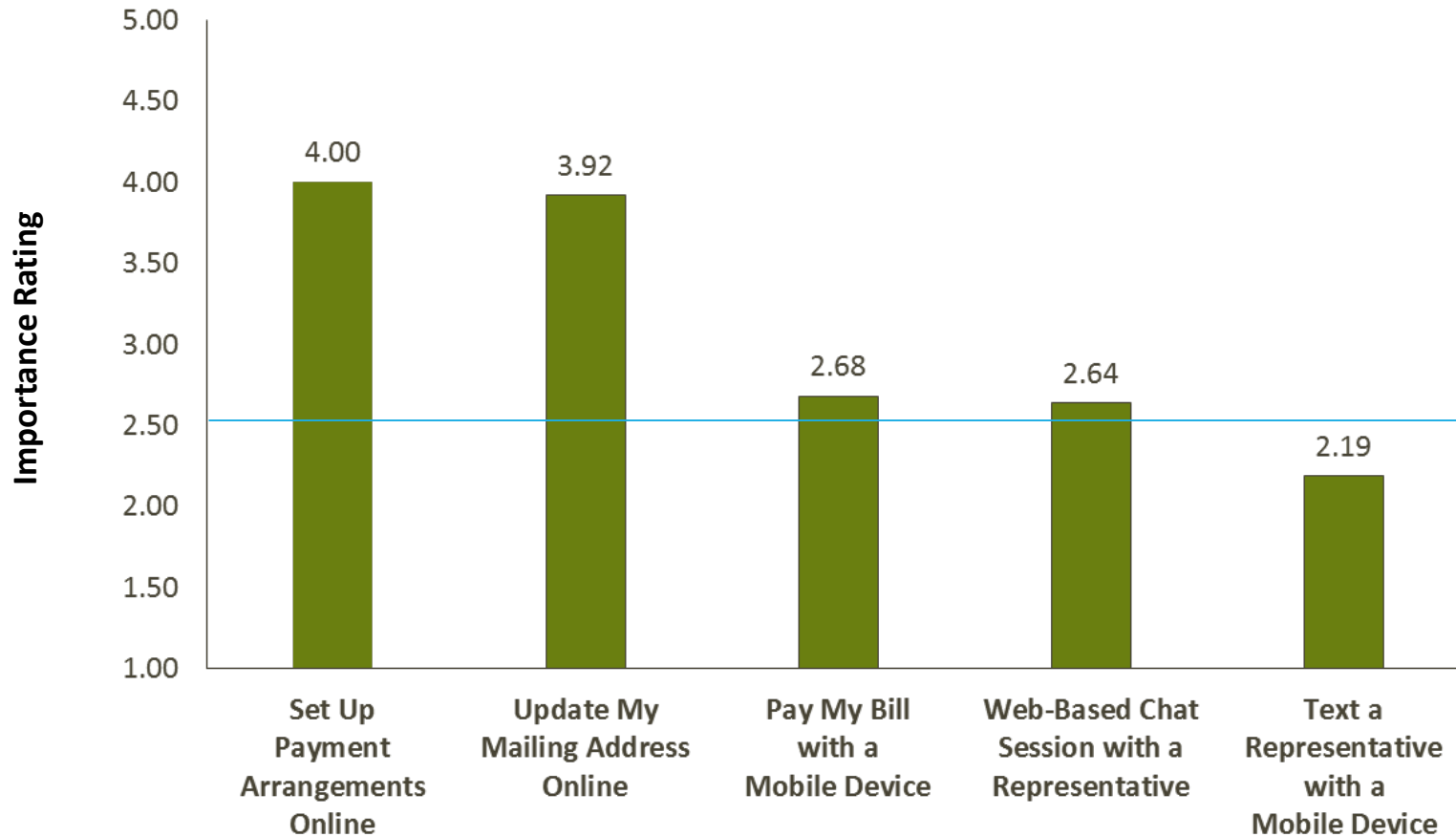
Q7.2: The representative is easy to understand

Q7.3: The representative treats me with respect

Q7.4: The representative communicates that they understand my concerns

Unweighted N = 859

Importance of Online Services



Q4: Please rate how important each of the following online services would be to you when thinking about improvements to Portland Water Bureau Customer Service. (Importance 1-5; 1=Not Important at All, 5=Very Important)

Q4.1: Ability to pay my bill with a mobile device

Q4.2: Ability to communicate online with a representative through a web browser-based chat session

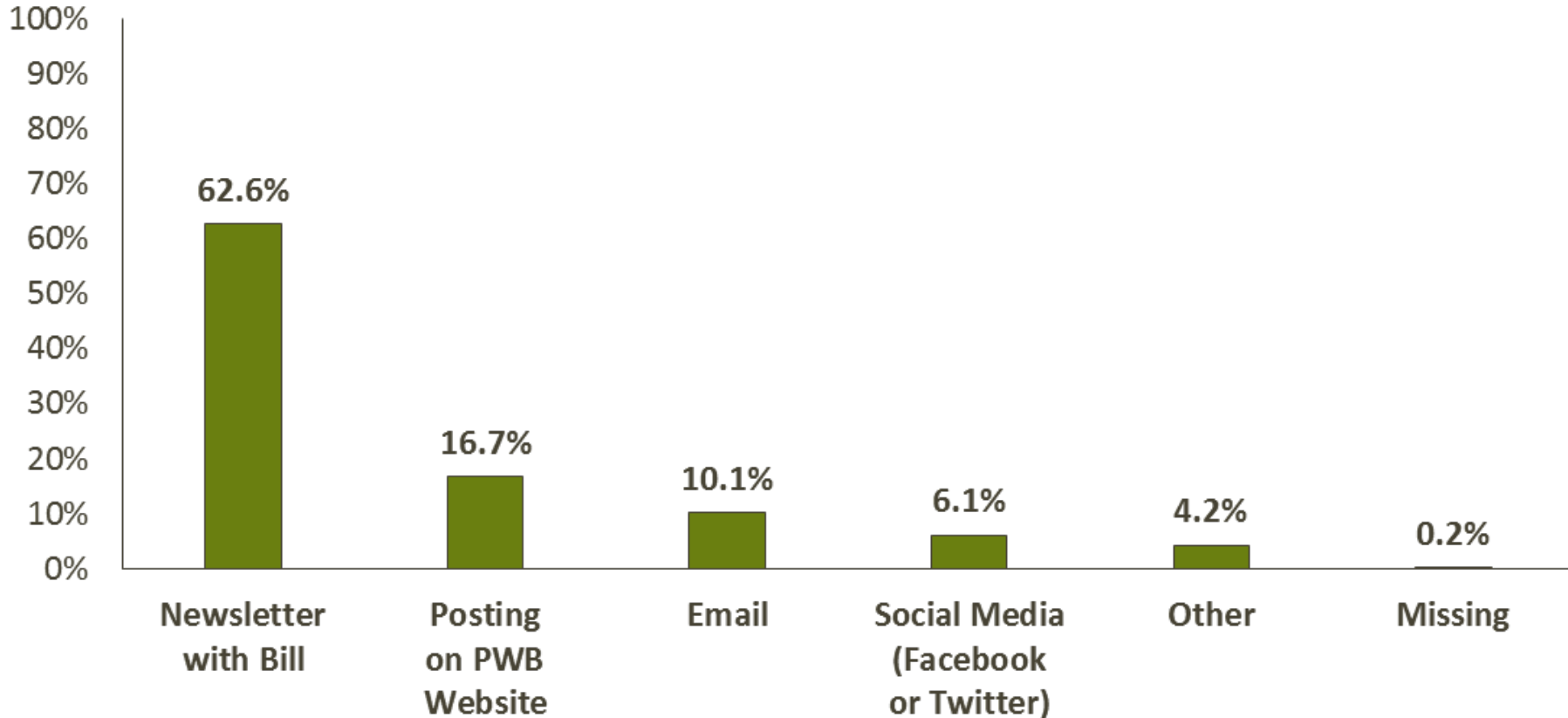
Q4.3: Ability to communicate with a representative by texting with a mobile device (cell phone or tablet)

Q4.4: Ability to update my mailing address online

Q4.5: Ability to set up payment arrangements online

Unweighted N = 859

Preferred Method of Communication for General News



Q8: What is your preferred method for receiving general news from the Portland Water Bureau?

Q8.1: Social Media (Facebook or Twitter)

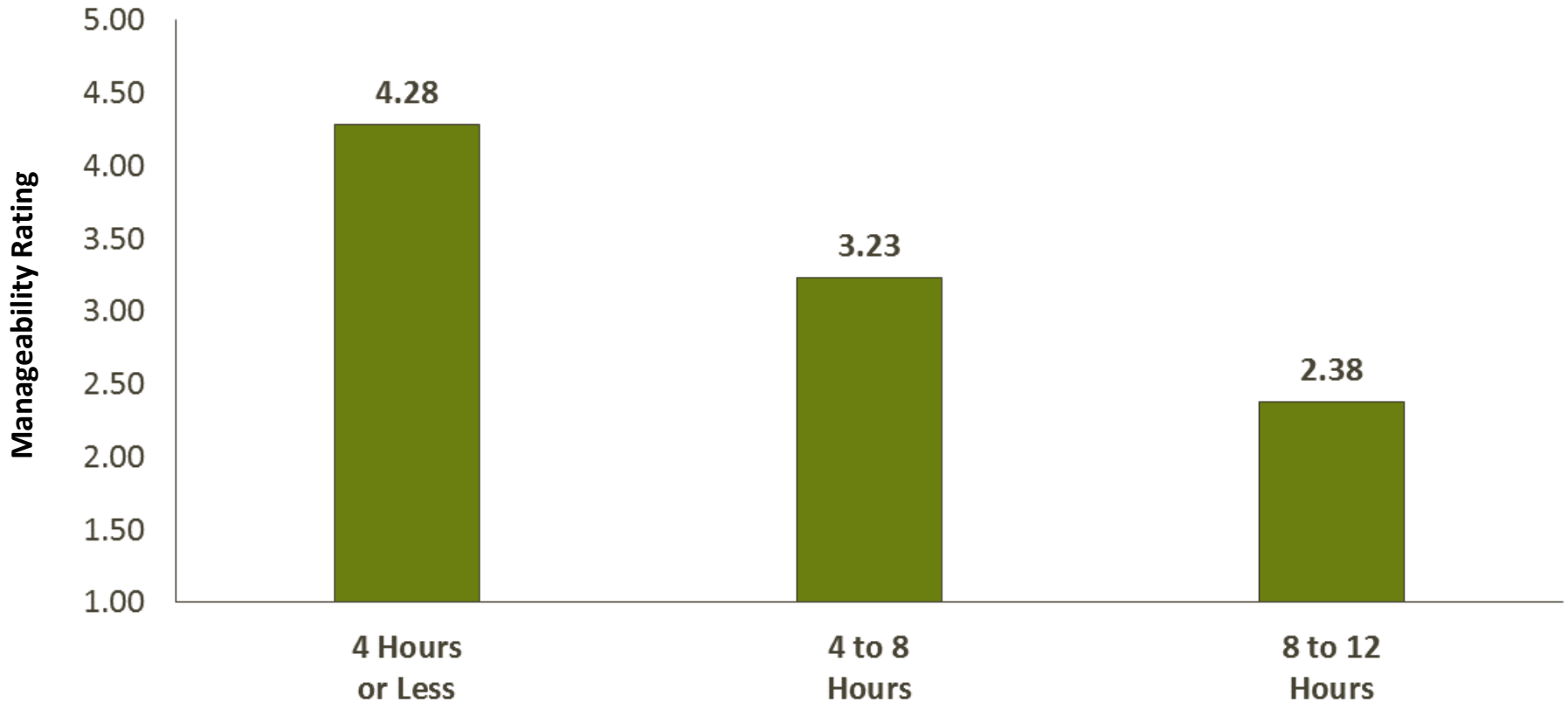
Q8.2: Posting on Portland Water Bureau Website

Q8.3: Newsletter with Your Bill

Q8.4: Other

Unweighted N = 859

Manageable Time Frame for Planned Outage



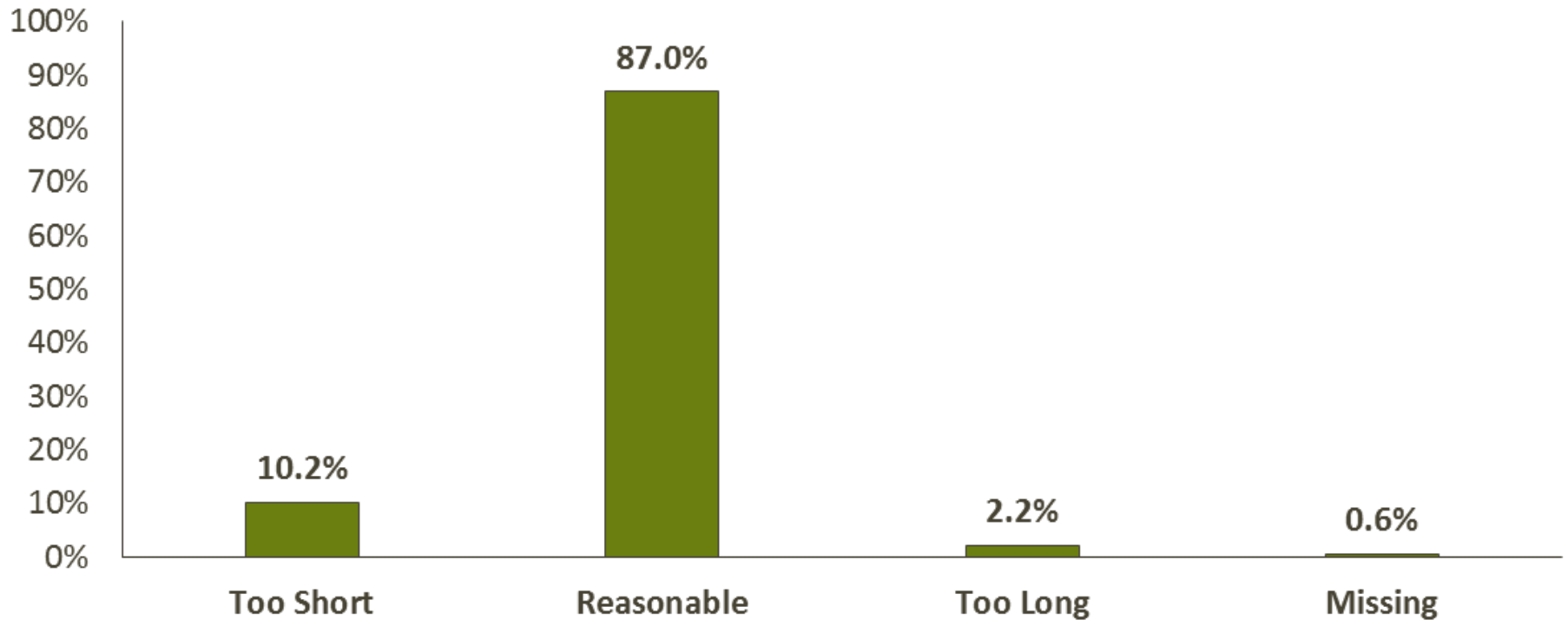
Q9: Please rate how manageable each of the following time frames would be for your household to be temporarily out of water, if you were given advance notice. (Manageability 1-5; 1=Not at all Manageable, 5=Very Manageable)

Q9.1: 4 Hours or Less

Q9.2: 4 to 8 Hours

Q9.3: 8 to 12 Hours Unweighted N = 859

Advance Notice for Planned Outage



Q10a: Thinking about the most recent time this happened, do you believe that the amount of advance notice you received for this temporary water outage was too short, reasonable, or too long?

Unweighted n = 193

How Notified of Planned Outage

| Notification [presented in descending order of percentage] | Percentage |
|---|-------------------|
| Door Hanger | 78.4% |
| Property Manager, Posted in Building, Home Owner's Association Notice | 7.3% |
| Mail | 3.8% |
| Don't Recall | 3.1% |
| Social Media (Facebook or Twitter) | 2.7% |
| Posting on PWB Website | 2.6% |
| Other | 2.4% |
| Phone | 2.3% |
| News on TV or Radio | 2.3% |
| Word of Mouth (e.g., neighbor, friend, family member) | 1.5% |

Q10b: How were you notified of this most recent water outage?
Unweighted n = 193

Preferred Method of Receiving Advance Notice

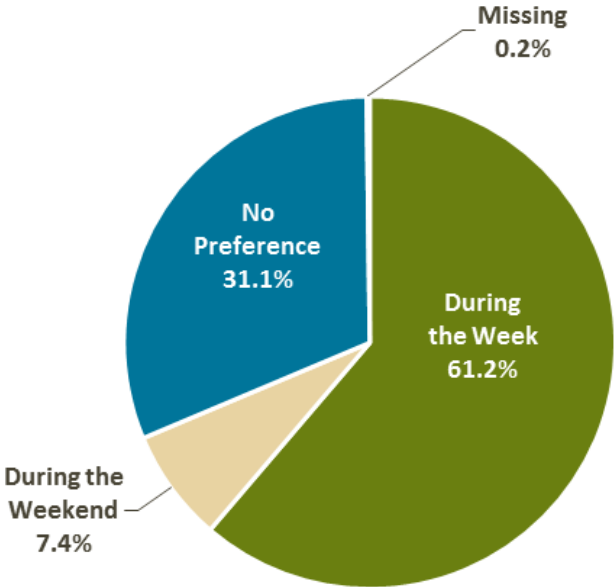
| Method [presented in descending order of percentage] | Percentage |
|--|------------|
| Automated Text Message | 24.8% |
| Email | 21.3% |
| Printed Notice in the Mail | 20.8% |
| Door Hanger | 19.8% |
| Automated Call | 10.5% |
| Other | 1.7% |
| Posting on Portland Water Bureau Website | 0.5% |
| Social Media (Facebook or Twitter) | 0.2% |
| Missing | 0.4% |

Q11: What is your preferred method for receiving advance notices about water outages?

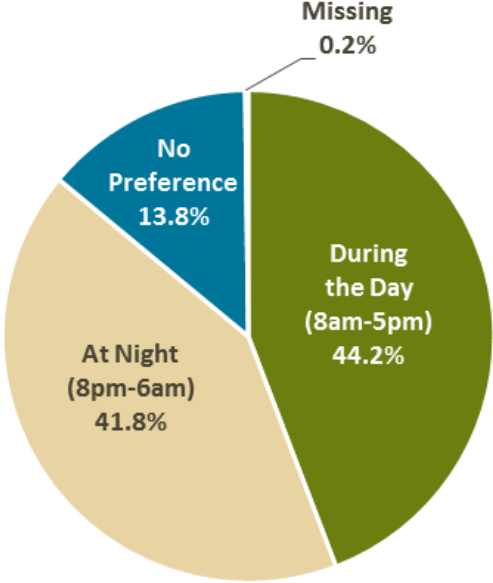
Unweighted n = 859

Preferred Time of Week/Day to be Out of Water

Preferred Time of Week to Experience a Water Outage with Advance Notice



Preferred Time of Day to Experience a Water Outage with Advance Notice

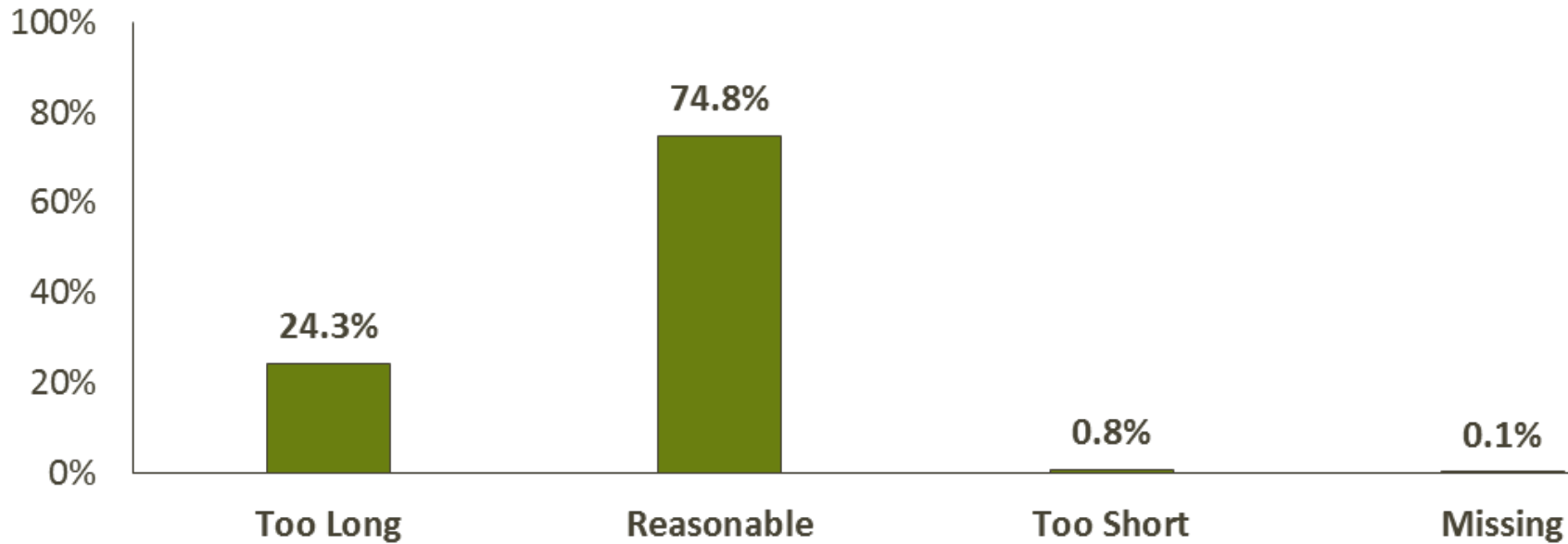


Q12: When would you prefer to experience a water outage with advance notice?

Q13: What is your preferred time of day to experience a water outage with advance notice?

Unweighted N = 859

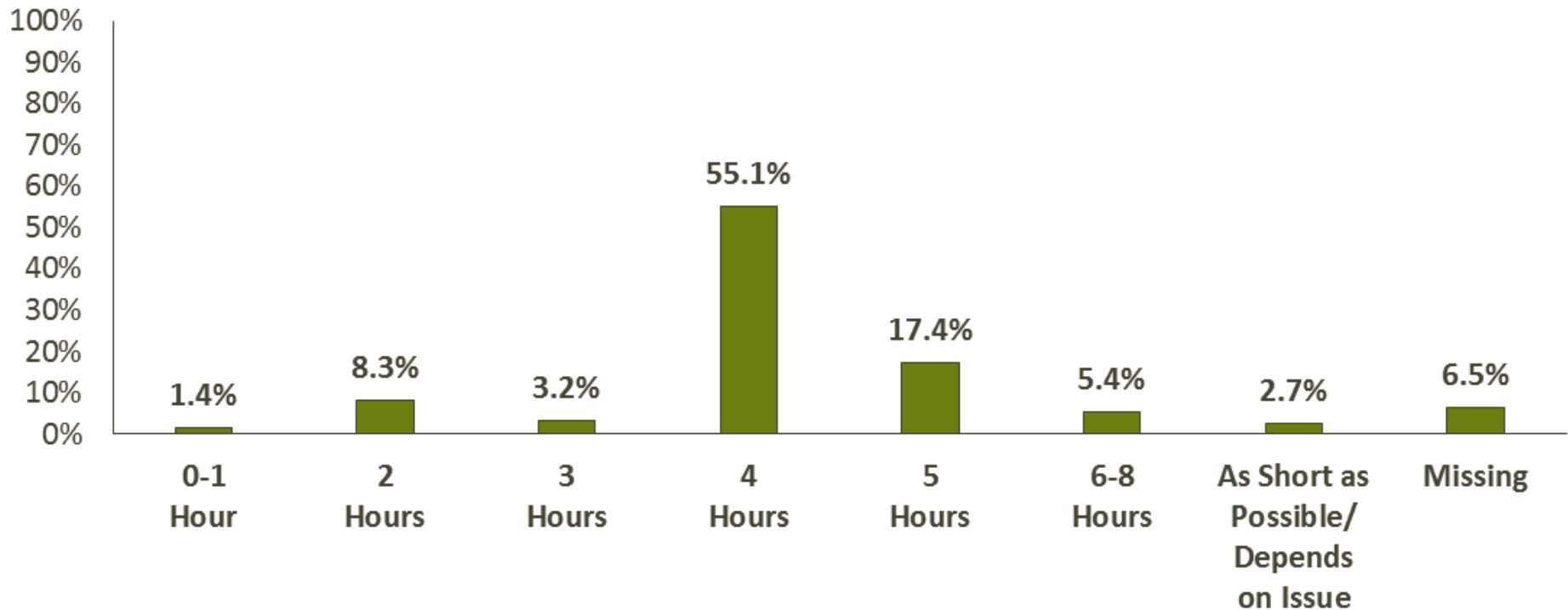
Reasonableness of Goal for Unplanned Outage Durations



Q14: Now please think about an unplanned water outage (for example, a water pipe break). In those circumstances, the Portland Water Bureau strives to ensure customers are not out of water for more than 8 hours. Do you think 8 hours is too long, reasonable, or too short?

Unweighted N = 859

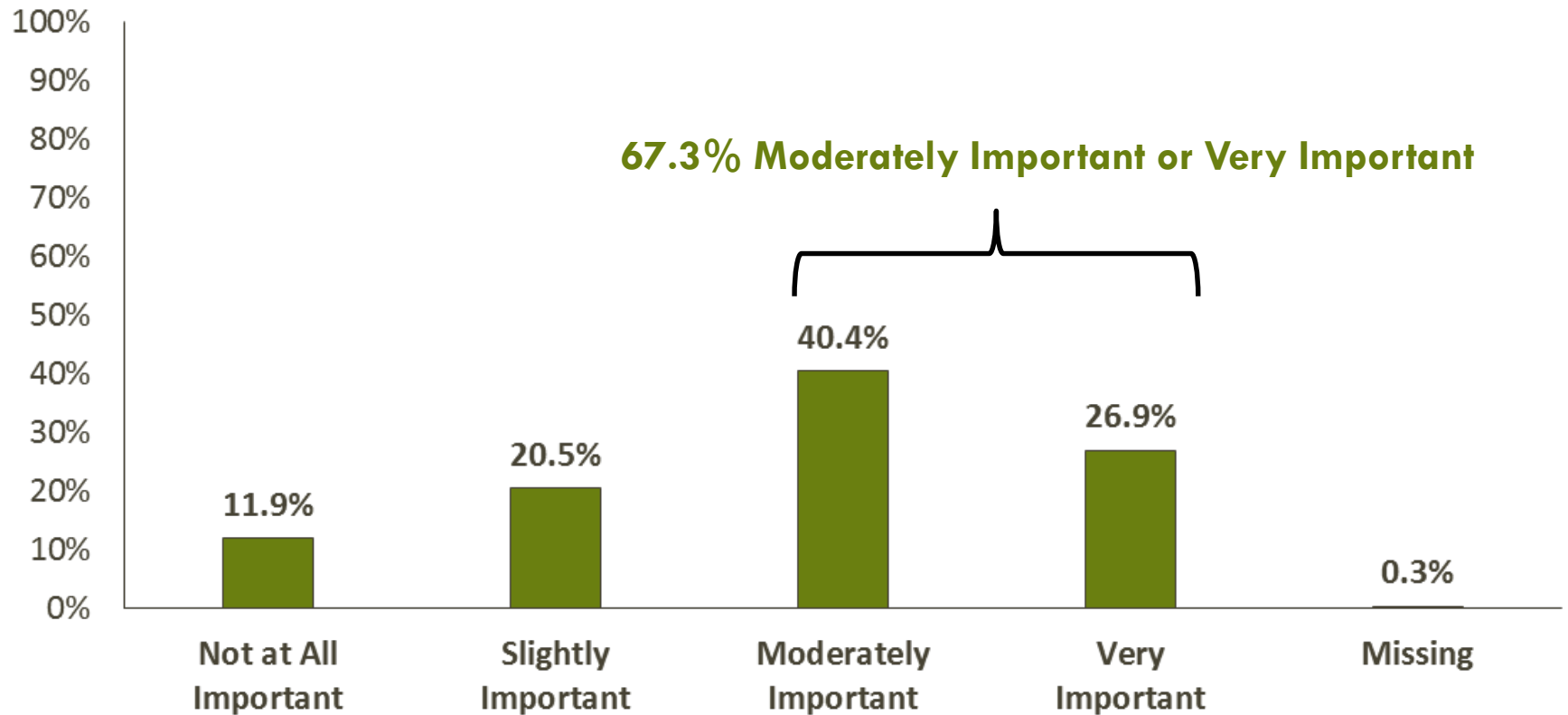
Acceptable Duration to Be Without Water



Q14a: What would be an acceptable length of time for customers to be out of water during an unplanned water outage?

Unweighted n = 186

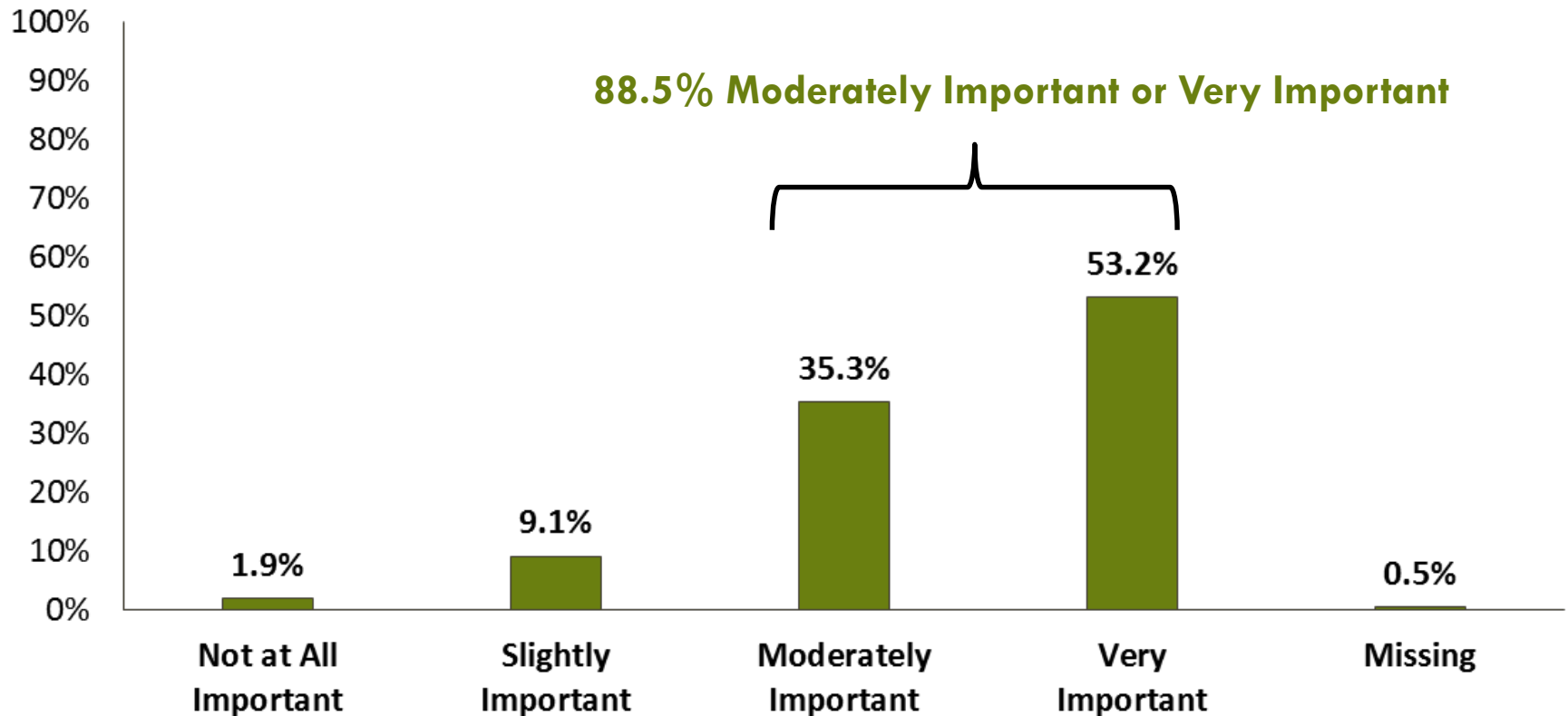
Investment in Automated Meters



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

Unweighted N = 859

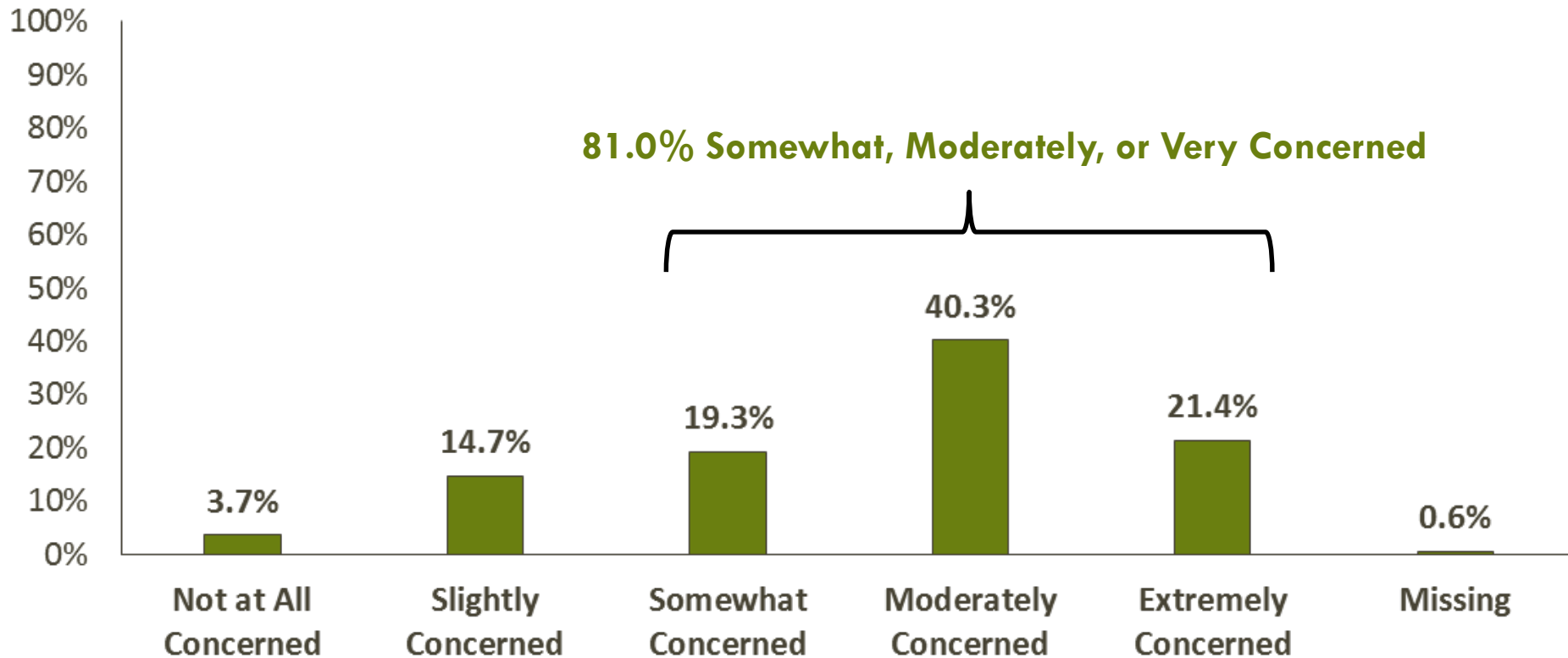
Investment in Earthquake Preparedness



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

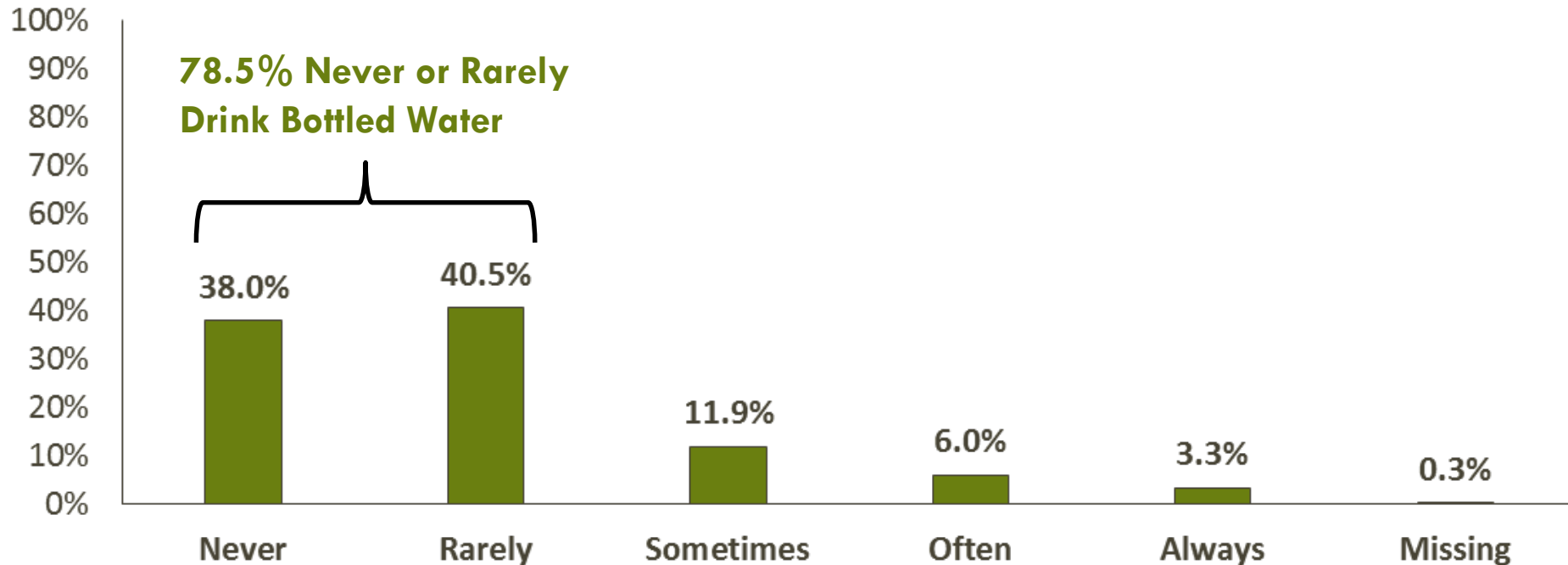
Concern about a Major Earthquake



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

Unweighted N = 859

Water-Drinking Behavior: Bottled Water



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?

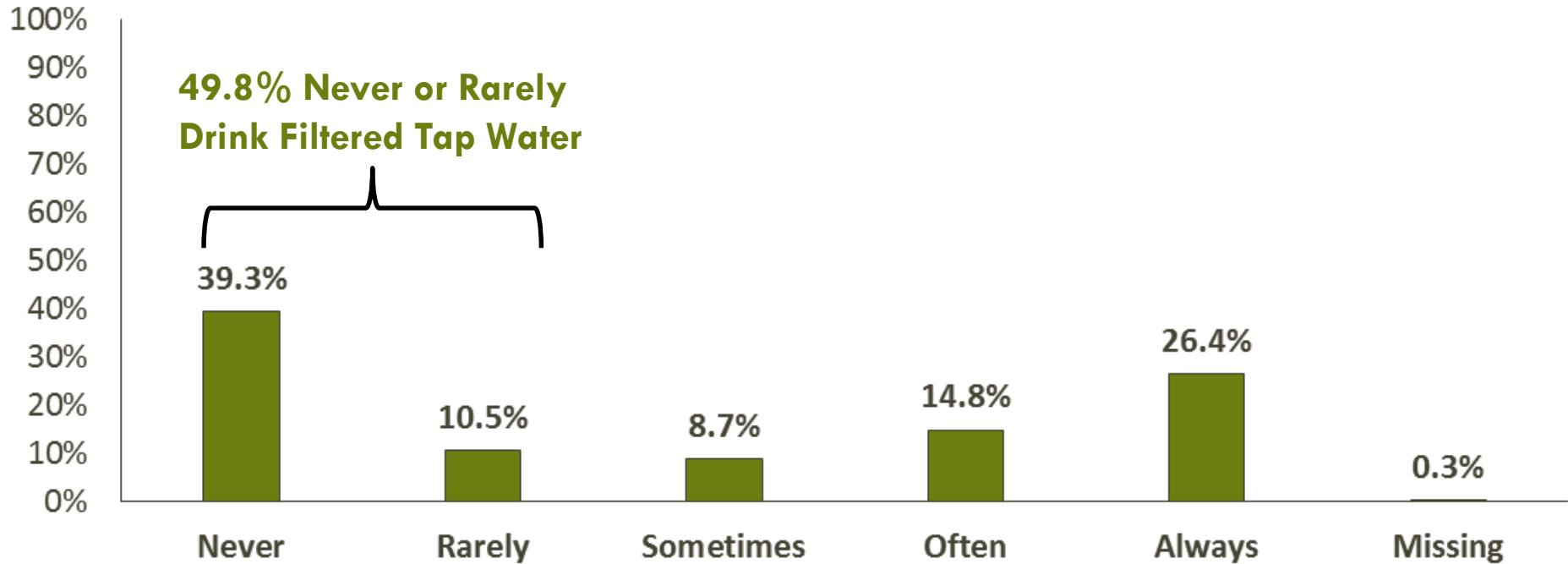
Unweighted N = 859

Reasons for Drinking Purchased Bottled Water

| Reason [descending order of percentage] | Percentage |
|---|------------|
| Convenience | 49.1% |
| Quality (e.g., taste, color, smell) | 43.9% |
| Safety | 29.0% |
| Habit | 15.4% |
| Like Sparkling, Flavored, or Carbonated Water | 6.2% |
| While Out, on Car Trips, in an Emergency, Brought from Somewhere Else | 4.4% |
| Other | 4.1% |
| Missing | 1.2% |

Q17a: Why do members of your household drink bottled water at home?
Unweighted n = 193

Water-Drinking Behavior: Filtered Tap Water



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)?

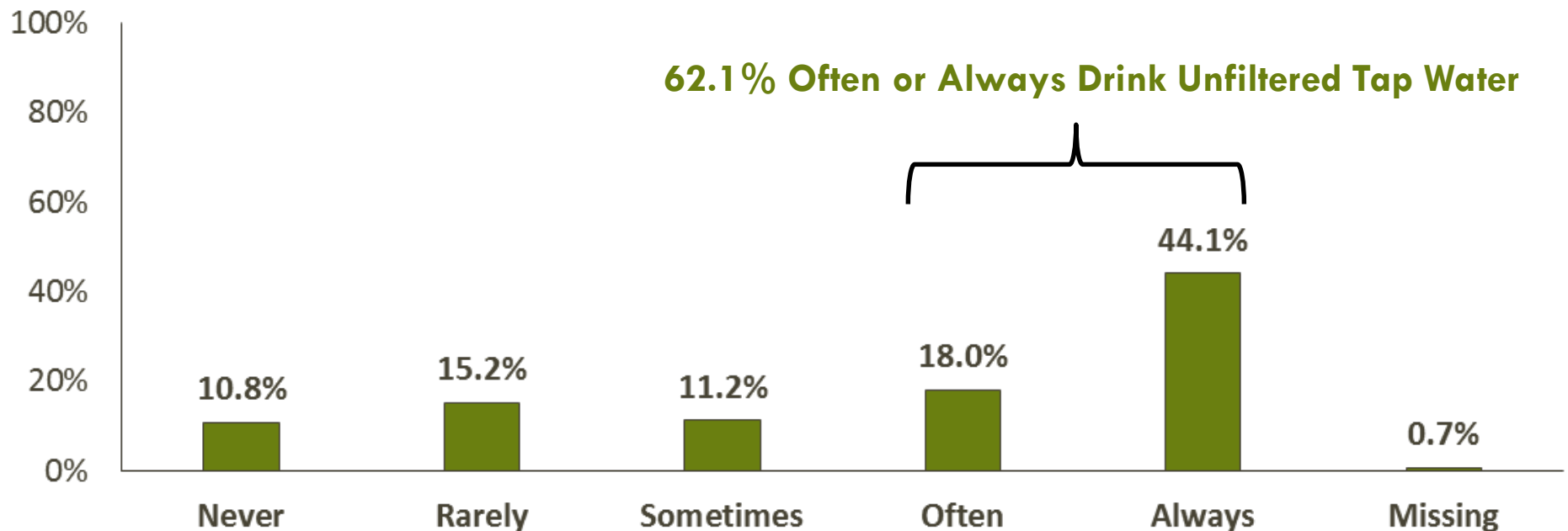
Unweighted N = 859

Reasons for Drinking Filtered Tap Water

| Reason [descending order of percentage] | Percentage |
|---|------------|
| Quality (e.g., taste, color, smell) | 63.8% |
| Safety | 52.0% |
| Convenience | 35.5% |
| Habit | 33.4% |
| Prefer Water Colder (i.e., kept in the fridge) | 5.9% |
| Cost | 3.2% |
| Already Filtered by the Fridge (i.e., built-in dispenser) | 1.9% |
| Environment | 1.2% |
| Other | 1.1% |
| Missing | 1.8% |

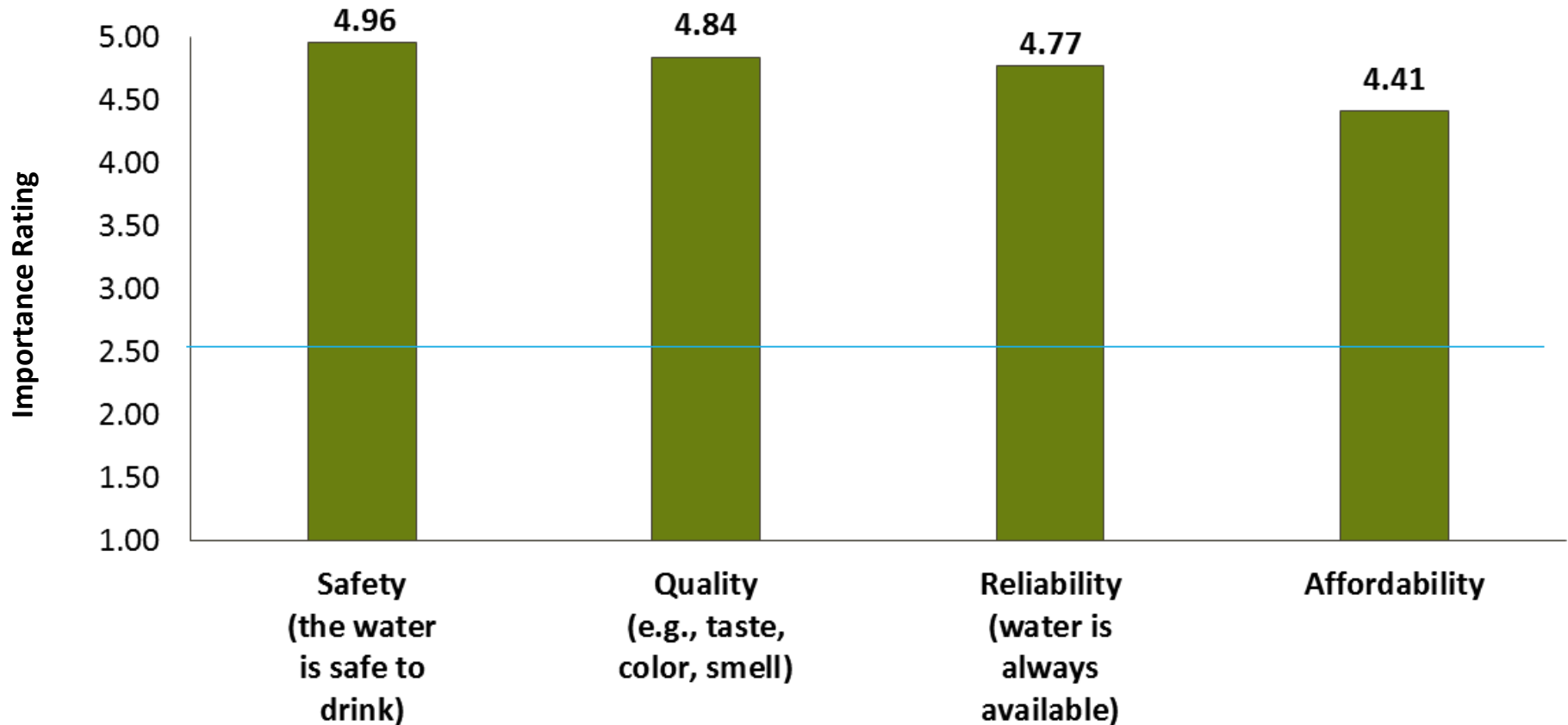
Q18a: Why do members of your household drink filtered tap water at home?
Unweighted n = 431

Water-Drinking Behavior: Unfiltered Tap Water



Q19: How often do members of your household drink tap water without using a filter?
Unweighted N = 859

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 (30.6 percent) provided comments.**

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

| Final Comments by Category [descending order of percentage] | 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% |

Next Steps

- The Water Bureau is auditing **its Key Service Levels**.
- This includes:
 - Review of more than 500 service levels from best-practice utilities.
 - Review of recommendations in all asset management plans for suggested service levels.
 - Application of SMART criteria (strategic, measurable, achievable, realistic, time-bound) to all service levels.
 - Consultation with bureau Asset Management Steering Committee.
- After the audit, the bureau will have recommendations for improving service levels and performance reports.

Your Questions

