

2015 Residential Survey

Presentation to Community Advisory Committees

August 2016

Seattle
 Public
Utilities



Surveys over Time

Surveys conducted over the past 15 years (since 2001)

Primary Purpose:

- Provide an overview
- Measure how the utility is doing in meeting residential customers' utility needs
 - Utility services
 - Customer services
 - Communication
- Gather information on some performance measures
- Gather information on current, relevant topics

Secondary Purpose:

- Collect information on selected high priority programs

Agenda

- Satisfaction with SPU utility services
 - Overall
 - Water, sewer, drainage
 - Other lines of business
- Problems in the neighborhood
 - Drainage
- Special topics
 - Emergency stored water
 - Recovery of water service after major disaster

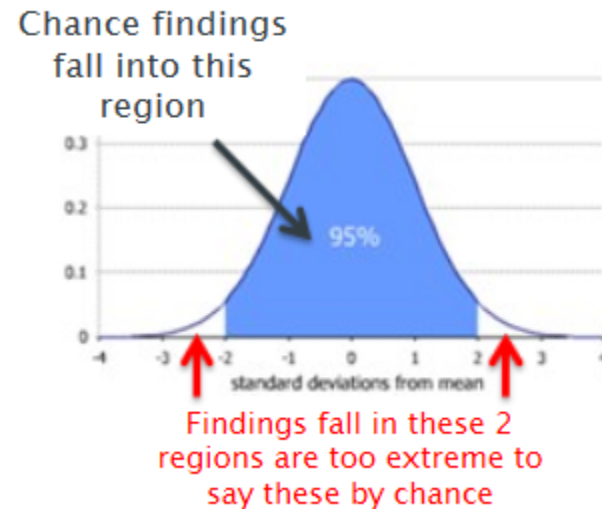


Methodology Overview

- Random mail survey with a 55% response rate!
 - 1,163 respondents from the primary sample; plus,
 - 429 respondents from an oversample of census tracts with higher densities of non-white race groups.
- Switched from telephone method
 - 42% in 2003, 26% in 2007, 12% in 2011

A Couple of Definitions

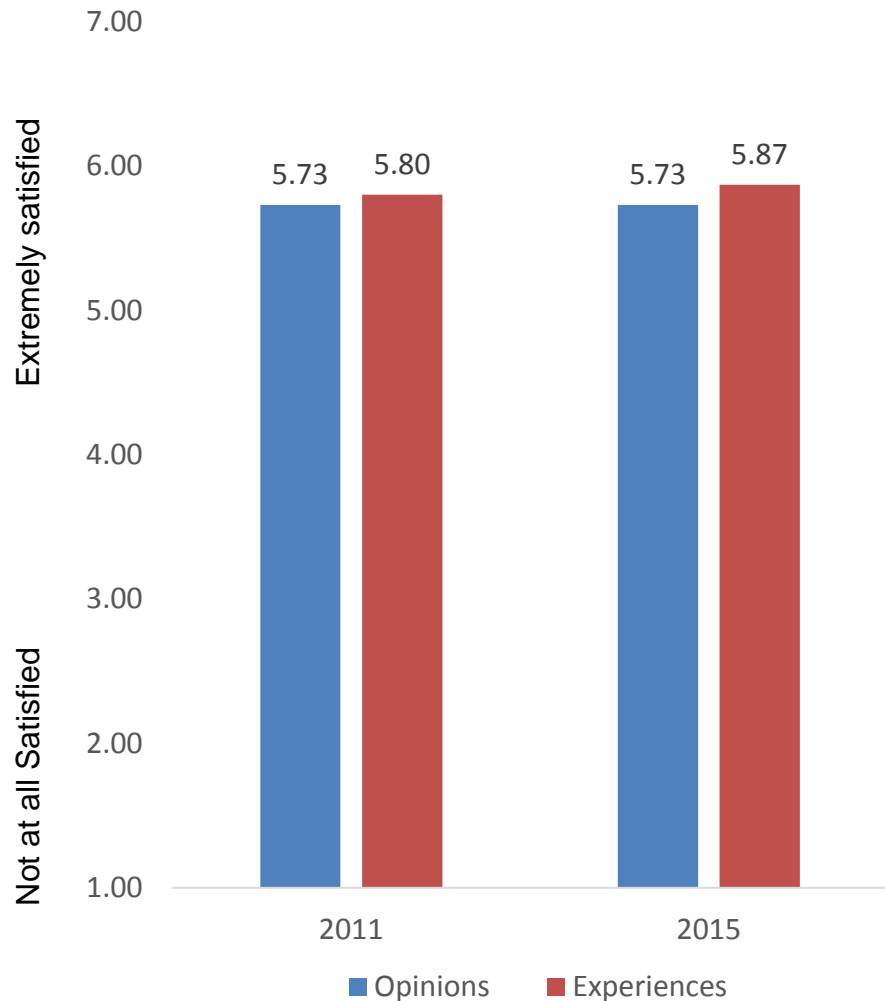
- Statistical Significance – a result that's not attributed to chance.
 - Significant – term used
- Managerial Significance – a statistically significant result that is also large enough to warrant management action



Satisfaction with SPU and Utility Services

2011 and 2015

Opinions and Experiences with SPU



Over time, the way people rate their opinions of and experiences with SPU has not changed.

Focusing on 2015, Seattleites are significantly more likely to rate their experiences with SPU higher than they rate their opinions of SPU.

Those who are 55 years of age or older are significantly more likely than those under 55 years of age to rate their opinions of and experiences with SPU higher.

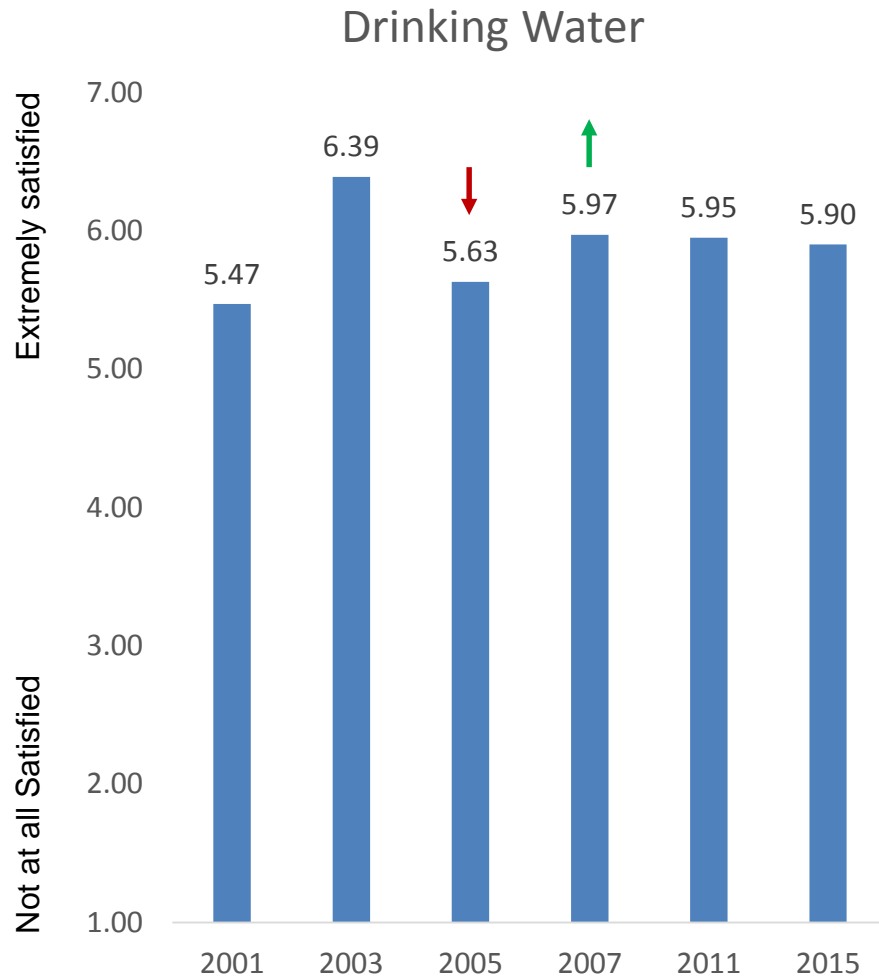


SPU keeps its promise to deliver efficient and forward-looking services

Seattleites used a 7-point scale (from excellent to poor) to rate how well SPU does on providing efficient and forward-looking services. The average performance score was 5.64.

- Females provide a significantly higher rating than do males (5.72 versus 5.52)
- Those 55 years of age or older provide a significantly higher rating than do those younger than 55 (5.80 versus 5.56)

Satisfaction with Drinking Water



The wording of this question changed in 2015 (from satisfaction with “drinking water quality” to satisfaction with “drinking water from the faucet”).

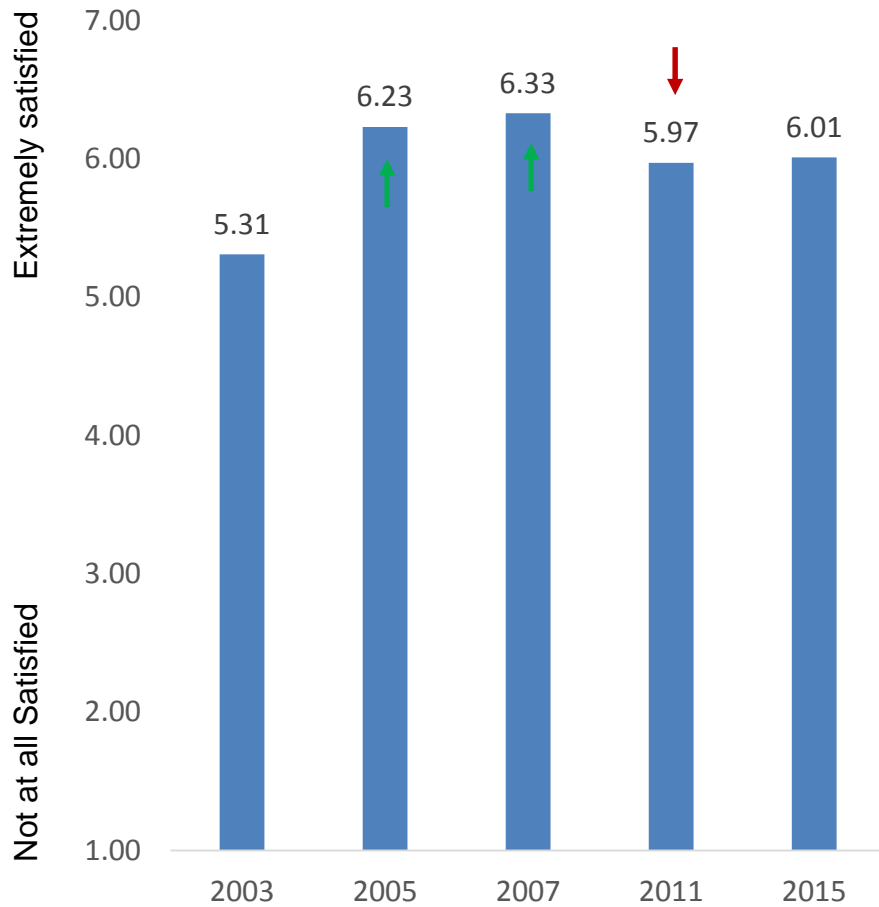
Satisfaction with the quality of drinking water was very high in 2003, and that satisfaction level has not been reached since.

In 2015, home owners, and those living in single-family dwellings are significantly more satisfied with their drinking water than are their counterparts.

Those who are White only are significantly more satisfied than those who are Asian only.

Satisfaction with Sewer Services

Sewer Services



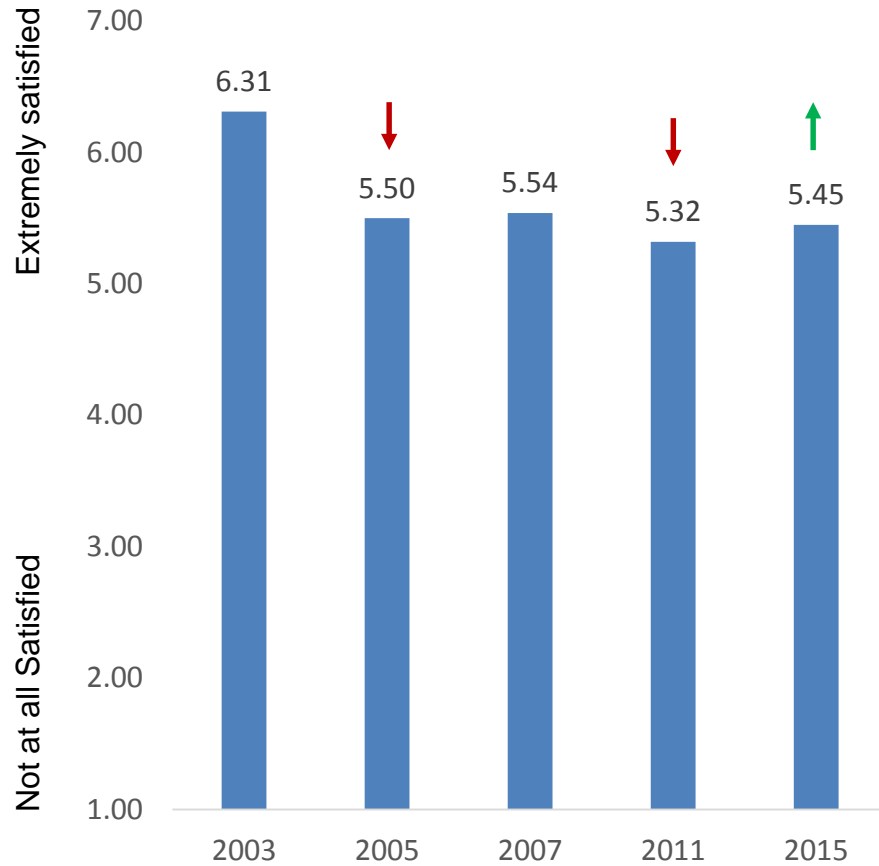
Satisfaction with sewer services increased significantly in 2005 and then again in 2007. Satisfaction decreased in 2011 and has remained stable since then.

Those who are White only are significantly more satisfied than are those who are Asian only.

Green arrow = up significantly from prior survey
Red arrow = down significantly from prior survey

Satisfaction with Storm Water (Drainage) System

Storm Water (Drainage) System



Satisfaction with the storm water or drainage system decreased significantly between 2003 and 2005, and then decreased again between 2007 and 2011. Satisfaction increased significantly in 2015.

Those who are 55 years of age or older are significantly more satisfied than are their younger counterparts.

Green arrow = up significantly from prior survey
Red arrow = down significantly from prior survey

Service Satisfaction Summary

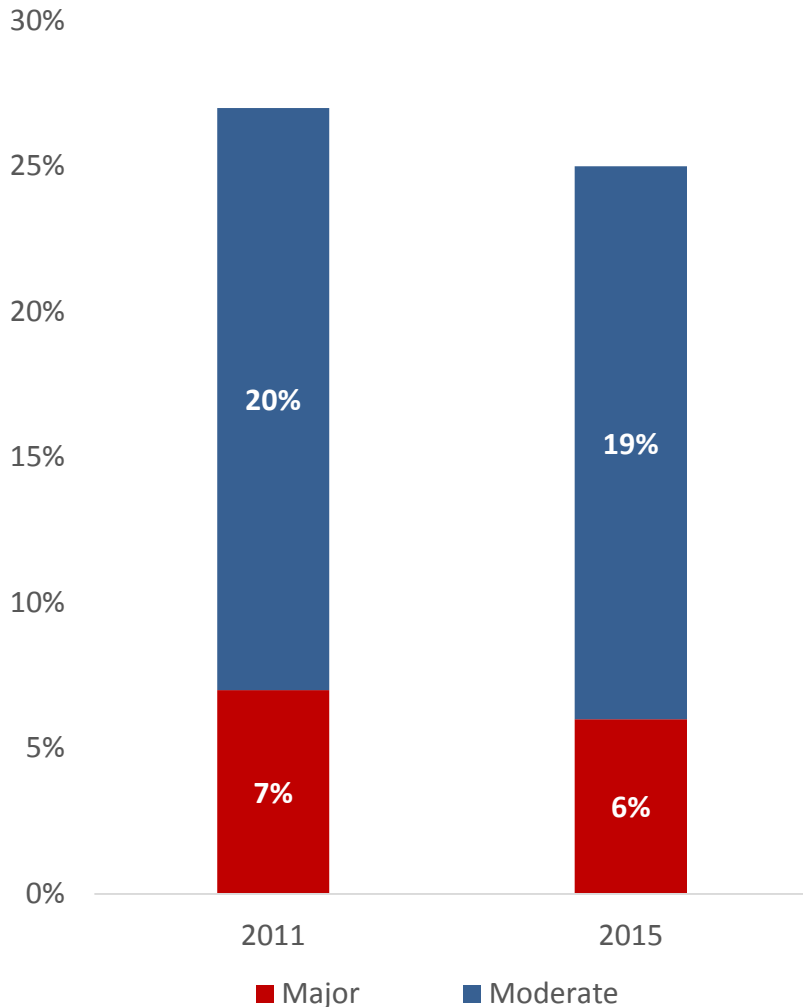
	2001	2003	2005	2007	2011	2015
All SPU Services (avg of averages)	5.79	<u>5.96</u>	5.90	<u>6.05</u>	5.93	5.88
The city's water supply	5.70	<u>6.02</u>	<u>6.31</u>	<u>6.45</u>	6.16	--
Garbage pick-up services	5.98	5.65	<u>6.09</u>	<u>6.27</u>	6.00	6.04
Food and yard waste	--	5.70	5.78	<u>5.98</u>	6.09	6.02
Recycling services	6.03	6.14	6.05	<u>6.14</u>	5.98	6.00
Sewer services	--	5.31	<u>6.23</u>	<u>6.33</u>	5.97	6.01
Drinking water quality	5.47	<u>6.39</u>	5.63	<u>5.97</u>	5.95	5.90
The city's transfer stations	--	--	5.52	5.63	5.76	5.53
Storm water drainage system	--	6.31	5.50	5.54	5.32	5.45

Bold blue underlined type indicates a significant increase in satisfaction between years and **bold red type** indicates a significant decrease in satisfaction.

Perceptions of Problems in Neighborhoods

– Drainage

Problems with Drainage



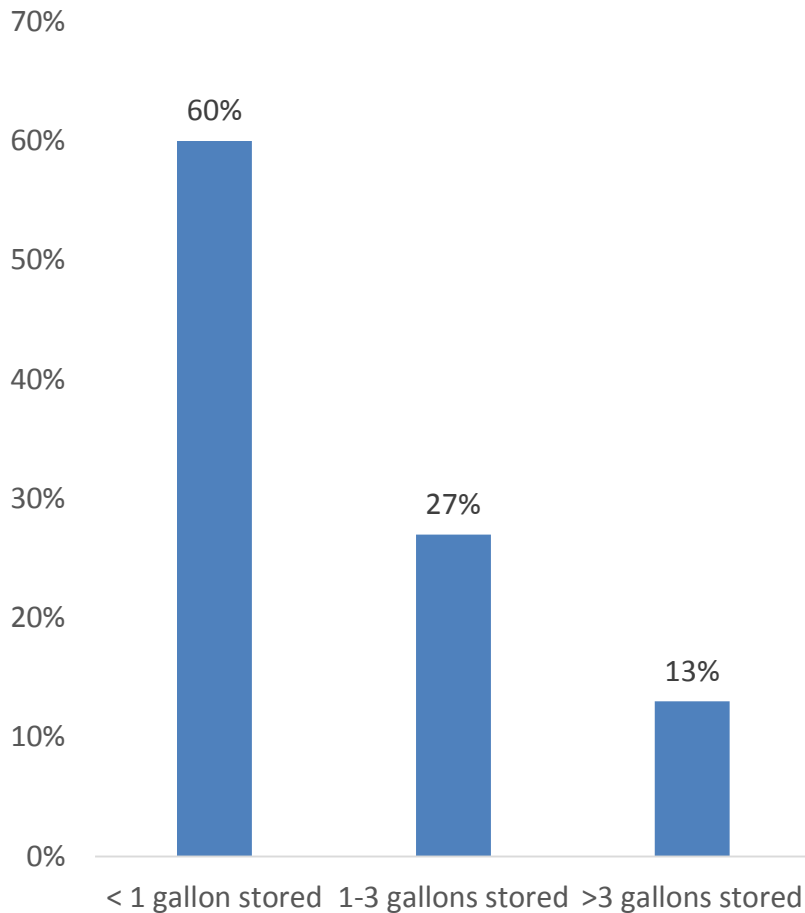
There are no significant changes in perception about how big a problem drainage is.

Perceptions that drainage is an issue tends to be highest among those living in Capitol Hill and the Duwamish.

Those living in Ballard and Queen Anne / Magnolia neighborhoods tend to be least likely to have concerns about drainage.

Special Topics:
Restoring Water Service
Bimonthly and Monthly Billing

60% have less than one gallon of water stored for emergency



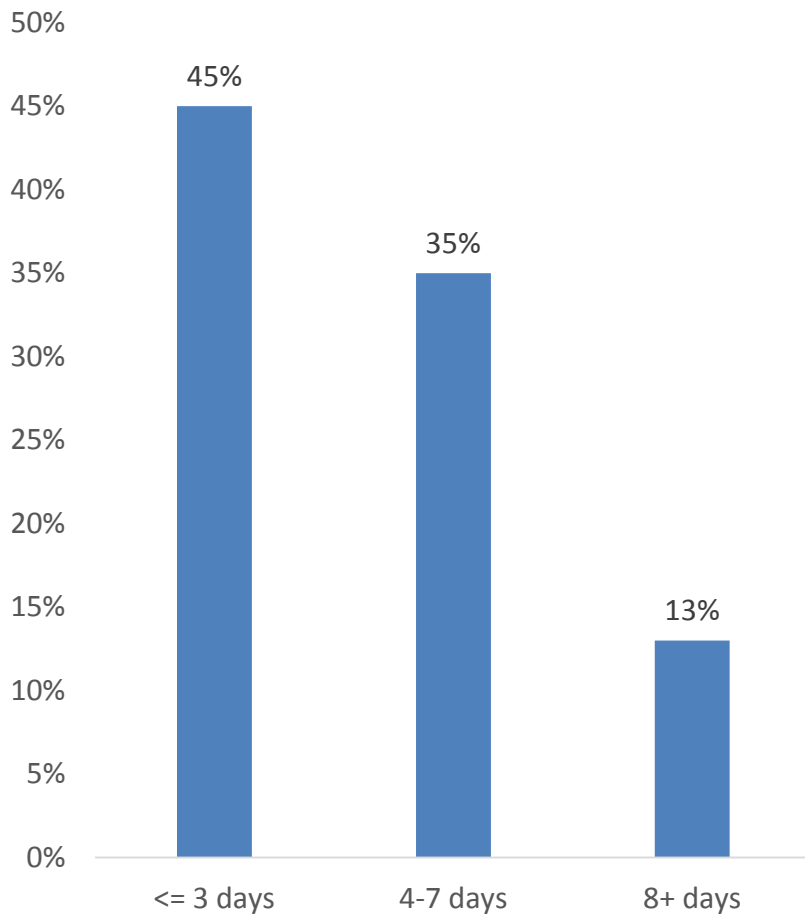
Commitment to storing water for emergencies increases with age.

Those under 35 have less than one gallon stored on average (0.60 gallons)

Those 35 – 54 have 1.12 gallons stored.

Those 55+ years of age have 1.45 gallons stored.

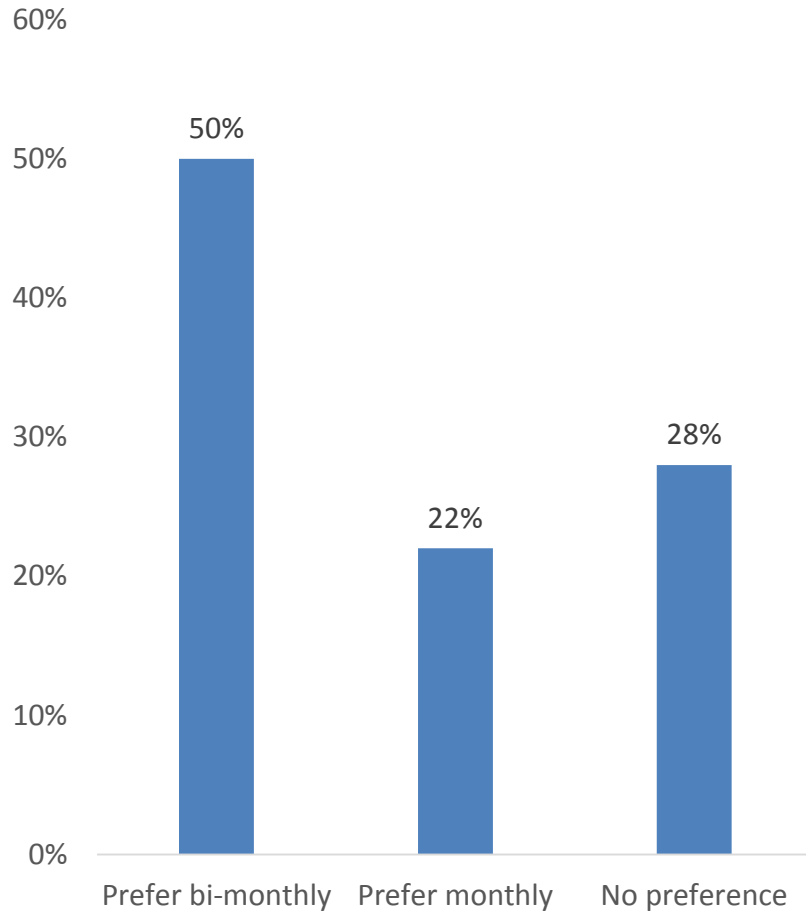
About half think water should be restored in three days



In the event of an earthquake sever enough to damage major roadways and bridges, 45% think water should be restored to their neighborhood in 3 days or less.

On average, the expectation is for water to be restored in just under 6 days.

Half say they prefer the current practice of bi-monthly billing



Two-thirds receive SPU bills

About one-quarter prefer a change to monthly billing.

Those most likely to prefer monthly billing are younger.

There are no differences in preference for monthly billing based on income.

Whites, Asians and those of other races are more likely than Blacks to prefer monthly billing.

Questions?

Thank you!

Survey Topics

- ❑ Opinions about SPU and experiences with SPU
- ❑ Satisfaction with SPU services
- ❑ Recent contacts with the utility
- ❑ Problems in the neighborhood
- ❑ Strategic Business Plan and SPU's Promise
- ❑ Communications Strategy
- ❑ Special Topics of Current Interest

- This is the end of the presentation.

2015 Combined Sample Sizes

Primary and Secondary Samples

Race	2015 Combined Sample Sizes
White only	1061
Black only	90
Asian only (includes Chinese, Vietnamese, Filipino, and Japanese)	194
Other race only	38
Mixed race	67
Refused	142
Total of primary and secondary samples	1592

Primary sample = 1,163 selected to be proportionate to Seattle population by census tract.

Secondary sample = 429 oversampled from areas known to have a higher density of people of color.

Demographic Characteristics

		2015 Residential Mail Survey	ACS 3-Year Estimates
Age	Under 35	31%	31%
	35 – 54	36%	36%
	55+ years of age	33%	32%
Dwelling Type	Single-family home	50%	50%
	Multi-family home	50%	50%
Ownership	Own	46%	46%
	Rent	54%	54%
Ethnicity	Caucasian	75%	75%
	Other	18%	25%
	No answer	7%	NA
Hispanic	Yes	4%	5%
Income	Under \$50,000	30%	39%
	\$50,000 or more	70%	61%