Customer Focus Groups
An Overview

October 12, 2016
Customer Focus Groups Overview

- 64 Seattle customers participated in two-hour discussions in locations around the City;
  - 4 residential groups
  - 1 business group
  - 1 developer group
Residential Profile

Residential customers represented a diverse range of incomes, languages, ages, races, and ethnicities.

- 60% own their own home and 40% rent
- Age-range from 19 to over 60
Residential Customers: Household Income

- Below $25K: 4
- $25-55K: 10
- $56-80K: 13
- $81-100K: 7
- $101-150K: 11
- $150K+: 2

N=47
Residential Customers: Age Distribution

- 18-24: 7
- 25-34: 9
- 35-44: 9
- 45-54: 11
- 55+: 11

N=47
Residential Customers: First Language

- English: 81%
- Chinese/Mandarin: 6%
- Spanish: 4%
- Korean: 4%
- Tagalog: 2%
- Farsi: 2%

N=47
# Residential Customers: Race and Ethnicity

<table>
<thead>
<tr>
<th>Race/Ethnicity</th>
<th>2010 Census Data</th>
<th>Focus Group Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pacific Islander</td>
<td>0.4%</td>
<td>4.3%</td>
</tr>
<tr>
<td>Other</td>
<td>2.4%</td>
<td>2.1%</td>
</tr>
<tr>
<td>Native American</td>
<td>0.8%</td>
<td>2.1%</td>
</tr>
<tr>
<td>Two or more races</td>
<td>5.1%</td>
<td>10.6%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>6.6%</td>
<td>10.6%</td>
</tr>
<tr>
<td>Caucasian</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asian</td>
<td>13.8%</td>
<td>21.3%</td>
</tr>
<tr>
<td>African American</td>
<td>7.9%</td>
<td>8.5%</td>
</tr>
</tbody>
</table>

- **2010 Census Data:**
- **Focus Group Data:**

Persons of color were over-represented in the research compared to 2010 census data.

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**Note:** The chart and table above represent the residential customer data broken down by race and ethnicity. The orange bars represent the 2010 Census Data, while the blue bars represent the Focus Group Data. The percentages show a notable discrepancy, with persons of color being over-represented in the research as compared to the 2010 census data.
# Business Customer Profiles

<table>
<thead>
<tr>
<th>Industry</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parking</td>
<td>500+ employees</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>11-25 employees</td>
</tr>
<tr>
<td>Contracting</td>
<td>101-500 employees</td>
</tr>
<tr>
<td>Real Estate</td>
<td>26-50 employees</td>
</tr>
<tr>
<td>Retail</td>
<td>500+ employees</td>
</tr>
<tr>
<td>Real Estate</td>
<td>101-500 employees</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>11-25 employees</td>
</tr>
<tr>
<td>Real Estate</td>
<td>51-100 employees</td>
</tr>
<tr>
<td>Low Income Housing</td>
<td>500+ employees</td>
</tr>
<tr>
<td>Pro Services</td>
<td>101-500 employees</td>
</tr>
<tr>
<td>Hospitality</td>
<td>101 -500 employees</td>
</tr>
<tr>
<td>Construction</td>
<td>11-25 employees</td>
</tr>
</tbody>
</table>
Customer Focus Groups
Good News!

- Customers are generally satisfied with SPU services
- They see SPU services as essential for their quality of life
- Customers are proud that SPU is a national leader in environmental stewardship
Customer Focus Groups
But, since 2012 customers feel…

- Greater distrust of and more cynicism around government and other institutions
- Squeezed by cost of living increases
- Are more likely to question factual information
Customer Focus Groups
Concerns

Percentage of customers very or somewhat concerned:

89%: Getting litter picked up
86%: Preparing for the effects of climate change
85%: Preventing water pollution from draining into rivers, lakes and the Puget Sound
78%: Preventing illegal dumping
73%: The availability of pure drinking water
Focus Group Perspectives
Why are utility bills so expensive?
Insert Video
Can SPU work with us to make it easier to sort garbage, recycling, and compost?
What can we do about climate change?
Insert Video
Is our water safe and will we have an adequate future supply?
What’s your goal and do you have a Plan to achieve it?
Participants were asked how they would invest $100 among the Plan’s strategic focus areas:

- *Better protecting health and environment* was favored by residential customers and developers.

- *Improving how we work to deliver consistent, high-quality services* was the first choice for businesses.

- *Making it easier to get help and find answers* to ensure equitable, accessible services for all.
Investment Changes from 2014-2016

The same $100 investment exercise was completed in 2014:

- **Making it easier to get help and find answers**: $14 in 2014, $18 in 2016.
- **Enhancing our services by continually updating employee skills**: $15 in 2014, $14 in 2016.
- **Improving how we work to deliver consistent, high quality service**: $35 in 2014, $24 in 2016.
Insert Video
Customer Focus Groups
Five Takeaways

- Build customer trust
- Speak to each customer’s experience
- Position SPU as a problem solver rather than enforcer
- Continue to strengthen partnerships with communities, businesses and developers
- Address how SPU is planning for climate change and emergencies
Questions