



St. Paul Regional Water Service Customer Survey September 2016

Methodology

- ▶ Telephone survey of adult residents within the service area of the St. Paul Regional Water Service
- ▶ Survey was conducted September 25th – October 6th, 2016
- ▶ Interviews were conducted in English, Spanish, and Hmong by trained, professional interviewers; landlines and mobile phones included
- ▶ 400 interviews with a margin of error of ± 4.9 percentage points
- ▶ Where applicable results are compared with:
 - Survey of St. Paul Regional Water Services Billpayers; conducted Sept. 23 - 29, 2013; n=402; MoE = ± 4.9 percentage points; EMC #13-4979

Please note that due to rounding, some percentages may not add up to exactly 100%.

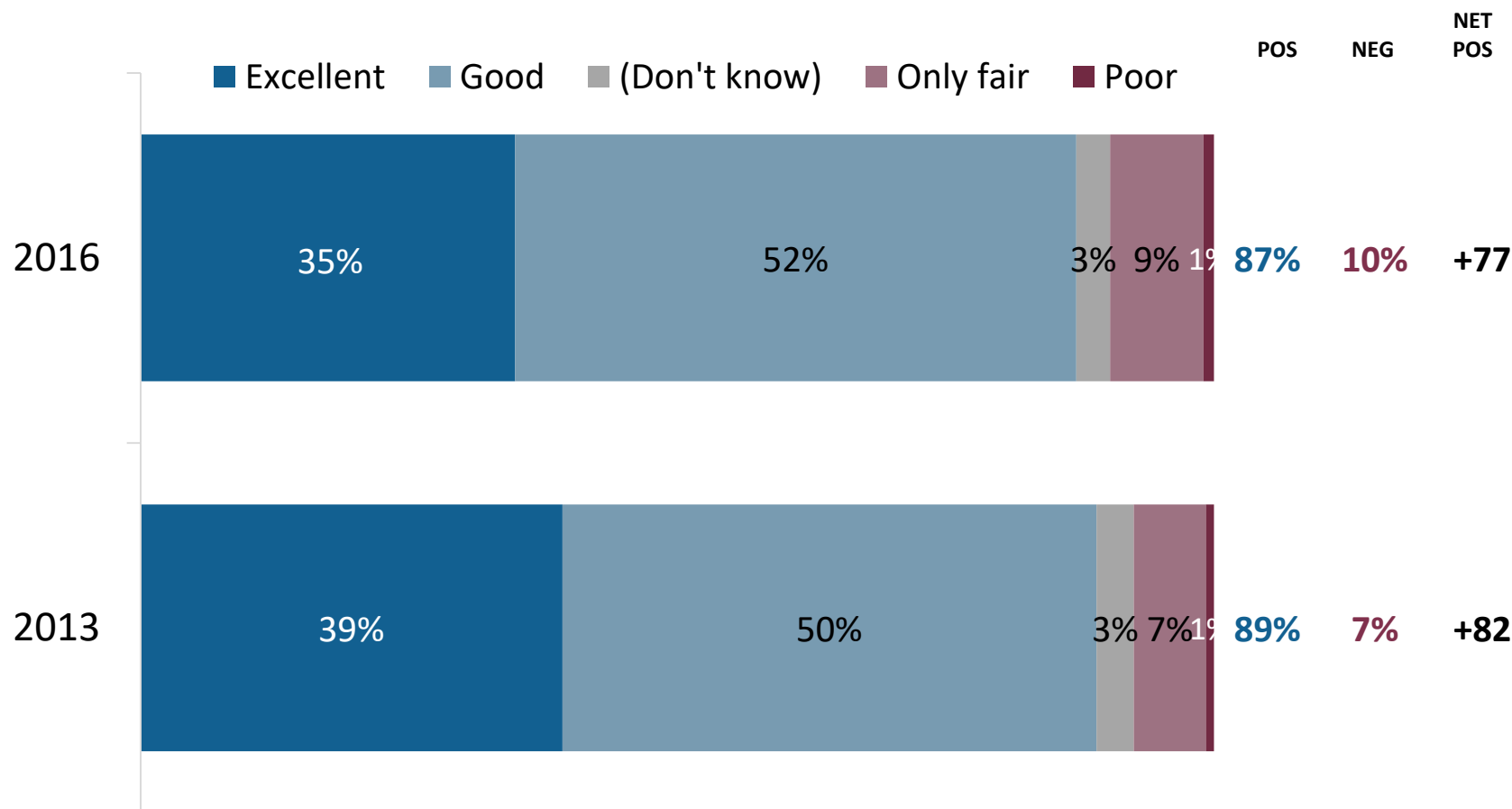
Key Findings

- ▶ SPRWS continues to receive strong job performance and service ratings, similar to what we saw in 2013.
- ▶ The agency received an 87% positive job rating this year, and tracked ratings for water reliability and other aspects of service in 2016 were similar to those in 2013.
- ▶ The agency's tap water receives an 88% percent positive quality rating, and 59% of respondents reported mostly using tap water at home.
- ▶ Awareness of lead pipe service is low, with only 17% of respondents reporting that they knew the lead status of their property. Interest in additional information on this topic is high, with a majority (57%) indicating that they would like more information on lead.
- ▶ Customer service ratings are strong. Only one in ten respondents reported calling SPRWS with a complaint, and of those, nearly six out of ten (59%) said their problem was resolved with one call.

SPRWS Job Ratings

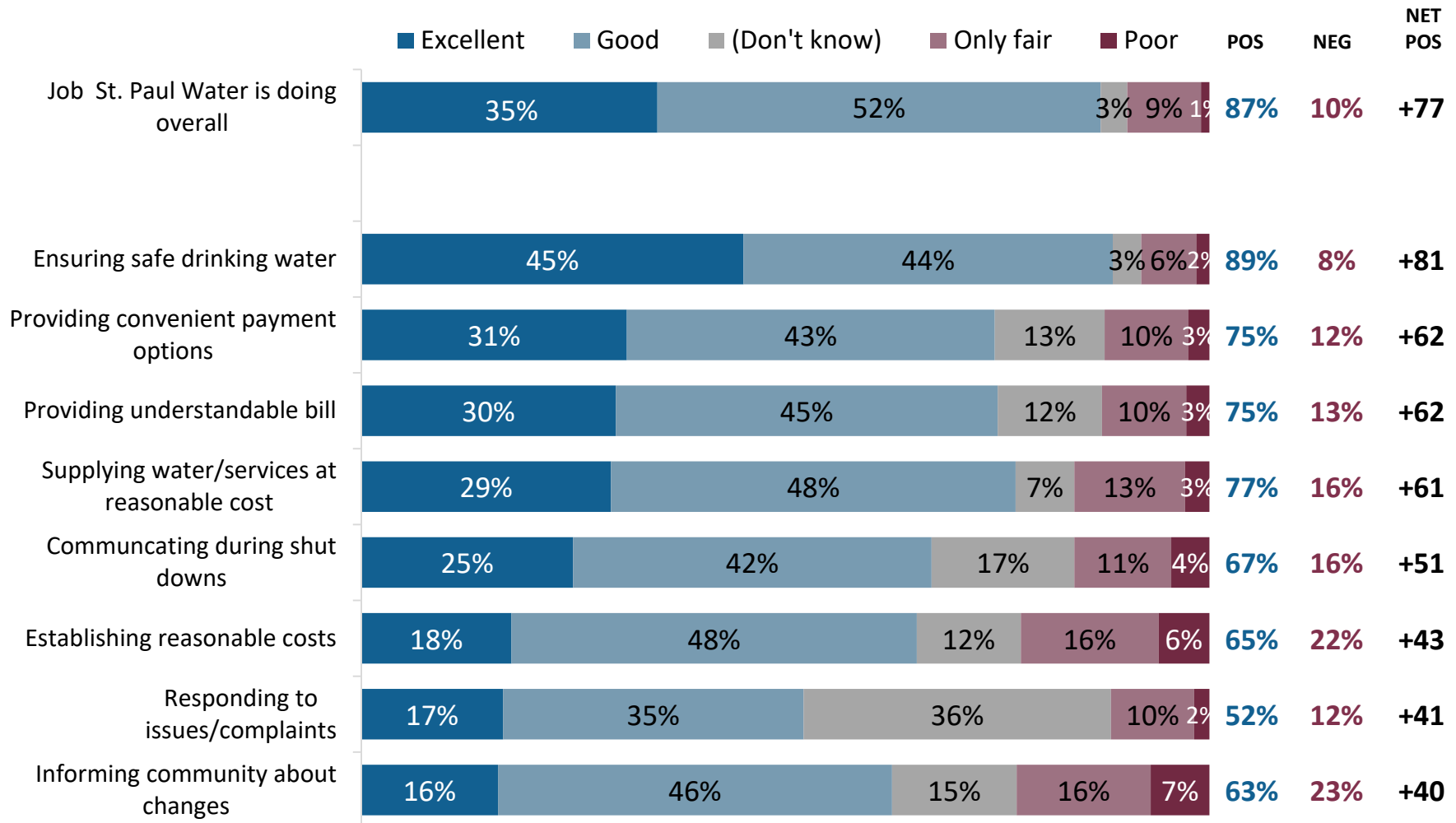
St. Paul Water Job Rating - Tracked

SPRWS' job rating has stayed strong since 2013, with nearly nine-out-of-ten residents giving the agency an Excellent or Good rating.



St. Paul Water Ratings on Responsibilities

SPRWS receives strong performance ratings for all job responsibilities tested; highest ratings are for ensuring safe drinking water and for overall performance.



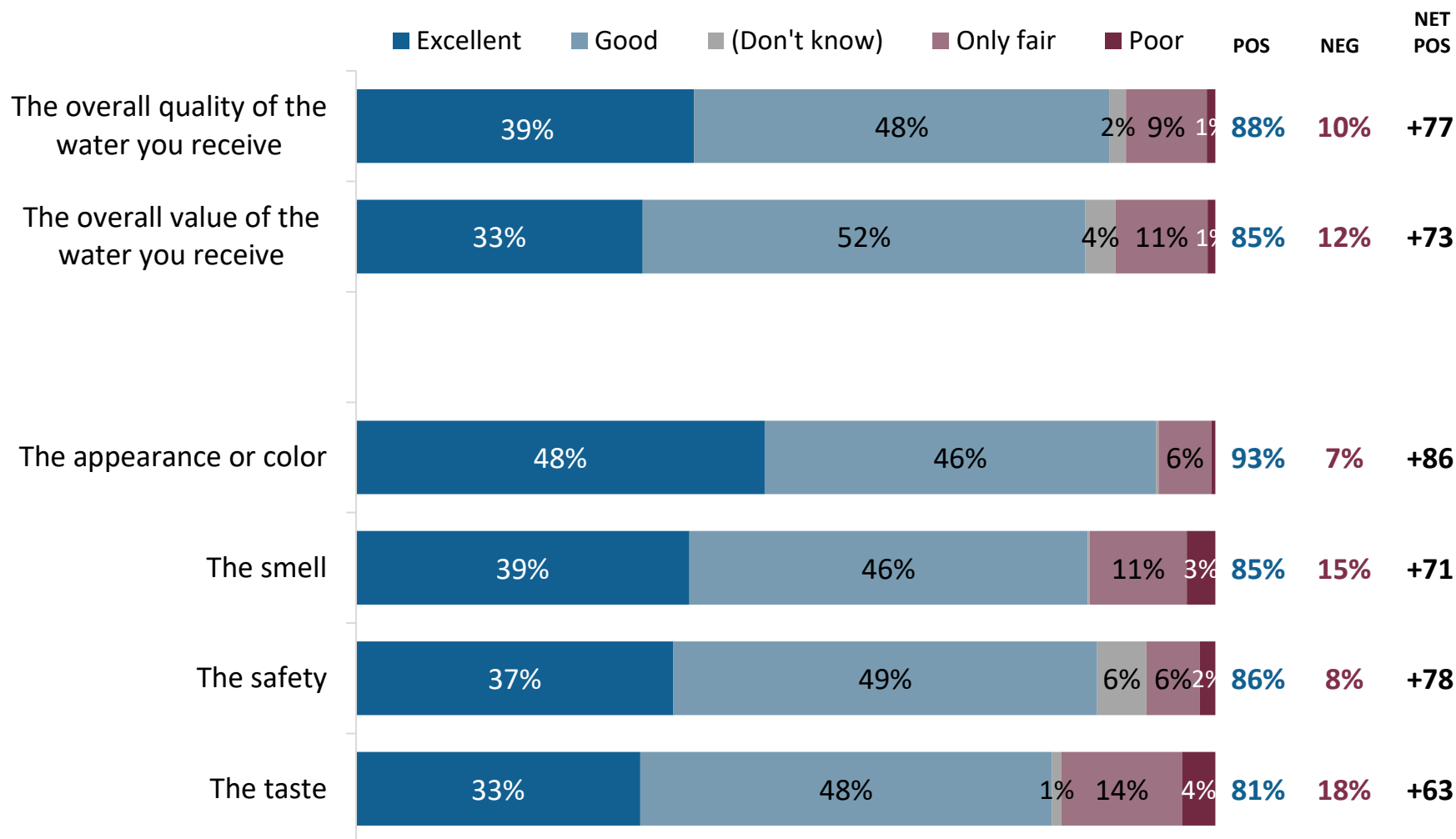
Q2-10. Using a scale of excellent, good, only fair, or poor, please rate the job Saint Paul Water is doing on each of the following responsibilities.



SPRWS Water Quality Ratings

Tap Water Ratings

Ratings for tap water quality are positive. Appearance and color receive the most positive rating.

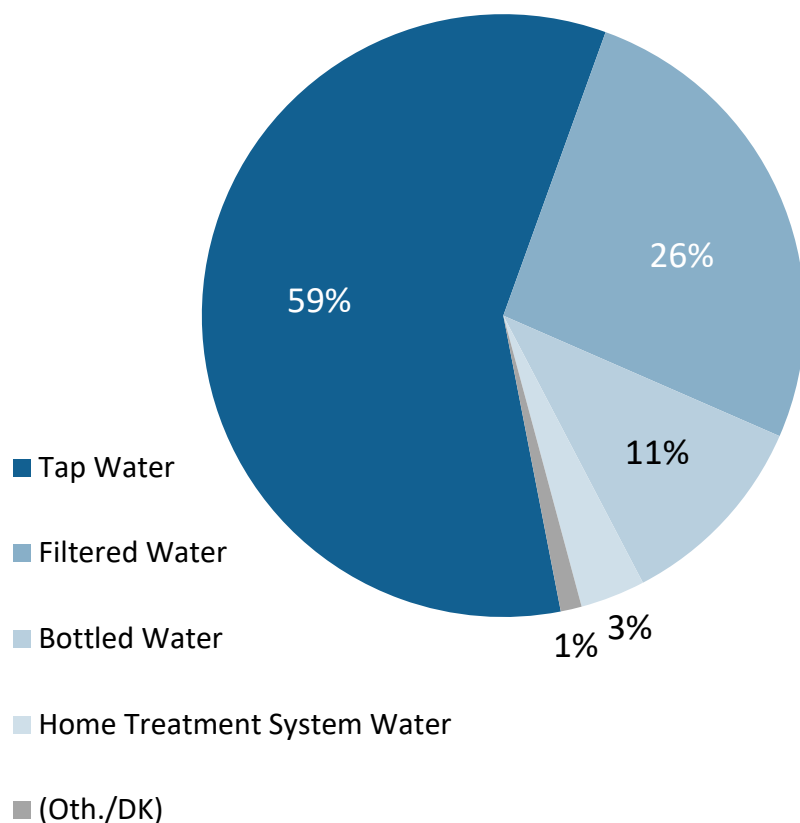


Q11-16. Thinking about your residence, using a scale of excellent, good, only fair or poor, please rate each of the following aspects of the tap water at your residence.

Drinking Water in Your Home

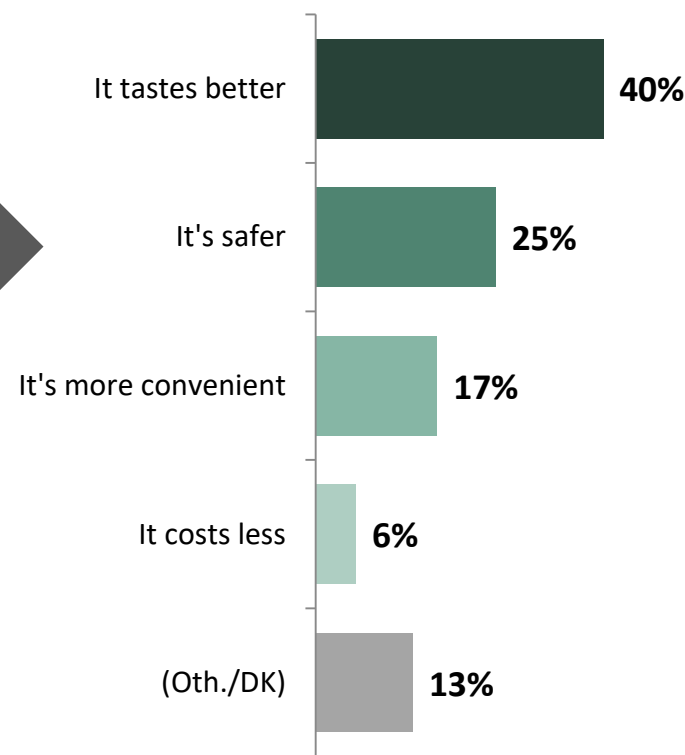
Nearly 6 of 10 customers mostly use tap water for drinking. Of those that do not use tap, a plurality (40%) cites taste as the reason. A quarter (25%) cite safety.

For drinking water do you mostly use...



n=166, does not mostly use tap water

Main reason to not typically drink tap water...



Q18. For drinking water in your home do you mostly use...

Q19. What is the main reason you do not typically use water from the tap for your drinking water?



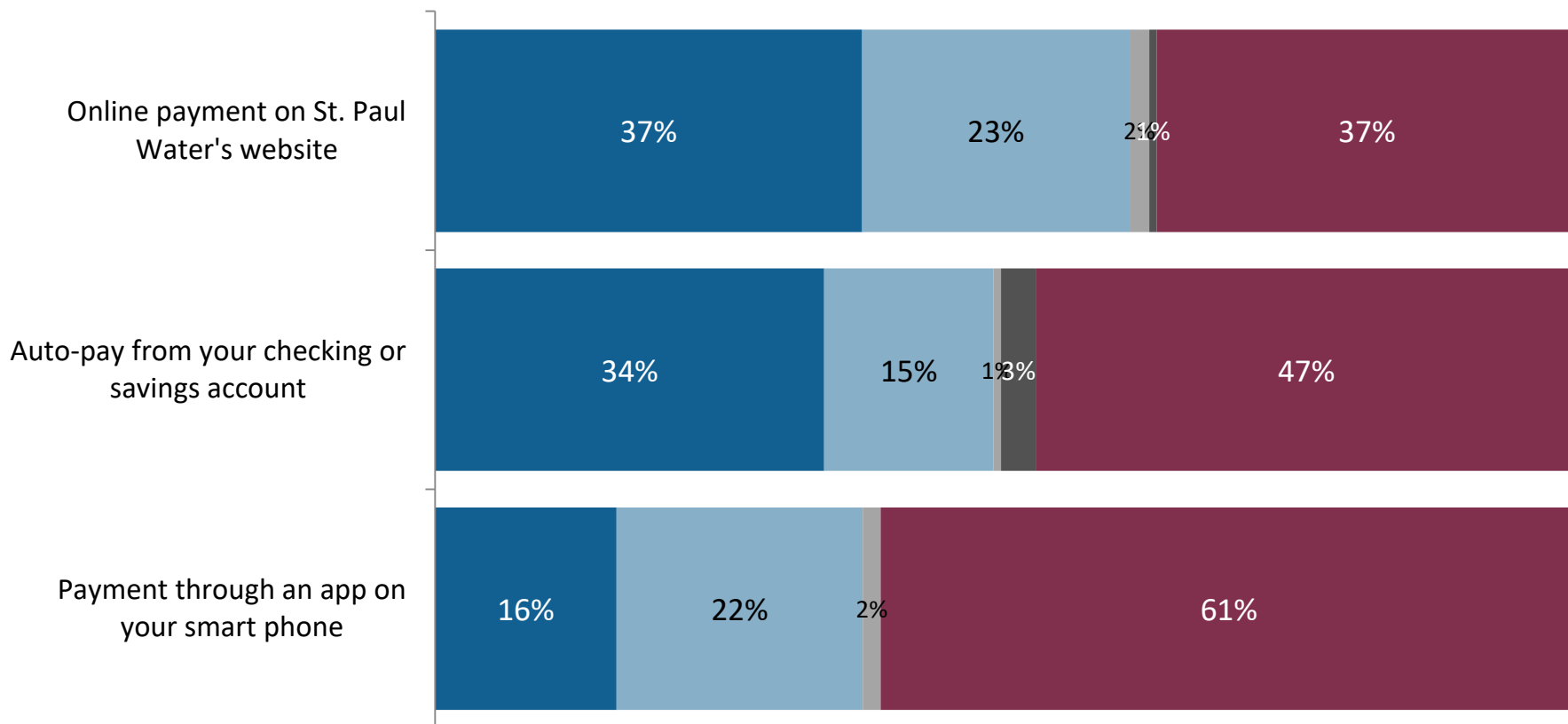
Billing and Payment Options

Potential Payment Options

The most popular proposed payment method is online payment via the website.

Bill-payers ONLY, n=255

■ Very Interested ■ Somewhat Interested ■ (DK/Ref.) ■ (Already have/use that) ■ Not at all Interested



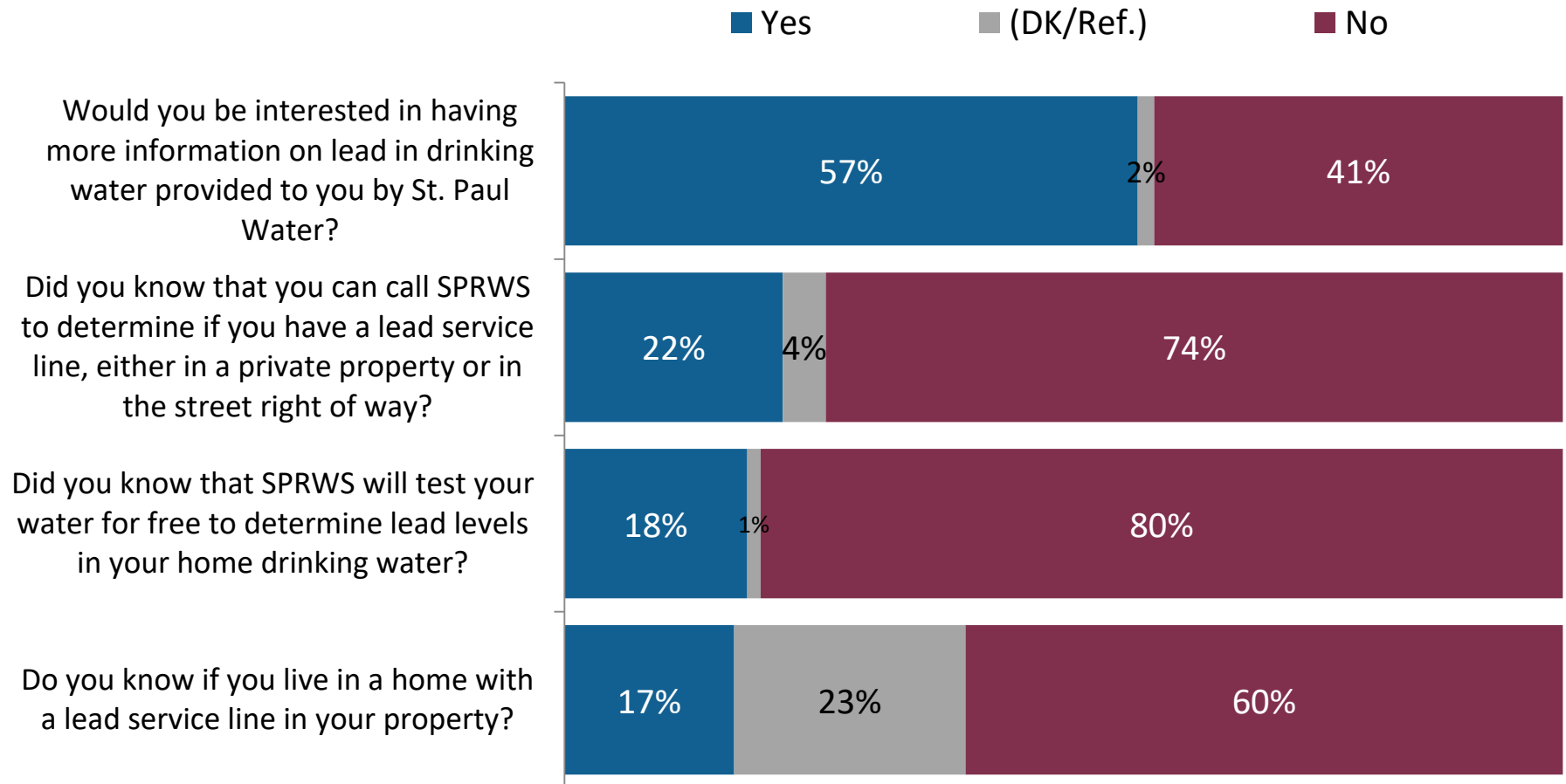
Q26-28. The following is a list of potential payment options for your water bill. Please tell me whether you are Very Interested, Somewhat Interested, or Not at All Interested in each option.



Lead Awareness

Water and Lead Awareness

Nearly 6 of 10 respondents would like more information about lead. Awareness of lead service lines and SPRWS' educational and testing efforts is low.





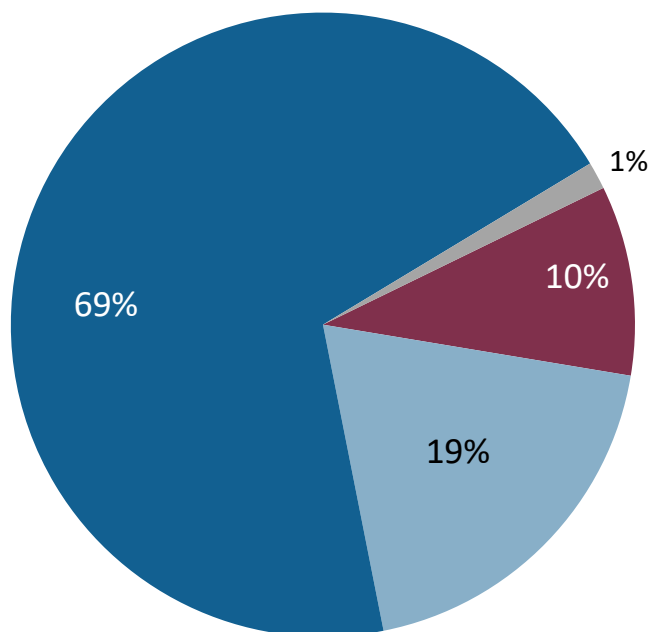
SPRWS Customer Service Satisfaction

Contacting St. Paul Water

The vast majority have never contacted SPRWS; of the small number who have contacted the agency with a complaint, most (59%) had their problem resolved with one call.

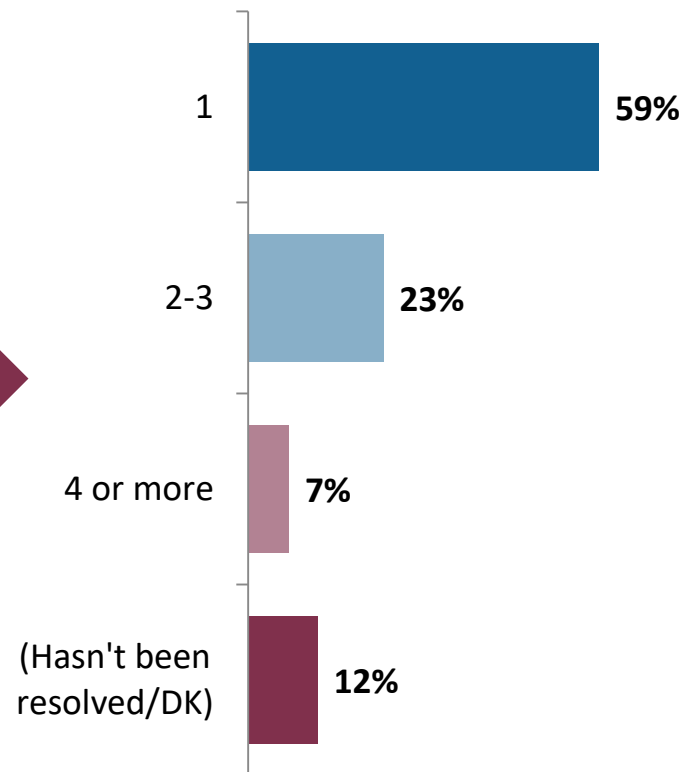
Have you ever contacted St. Paul Water?

- Yes, problem/complaint
- Yes, some other reason
- No, never contacted
- (DK/Ref.)



n=39, called with complaint

How many calls did it take to solve the problem?



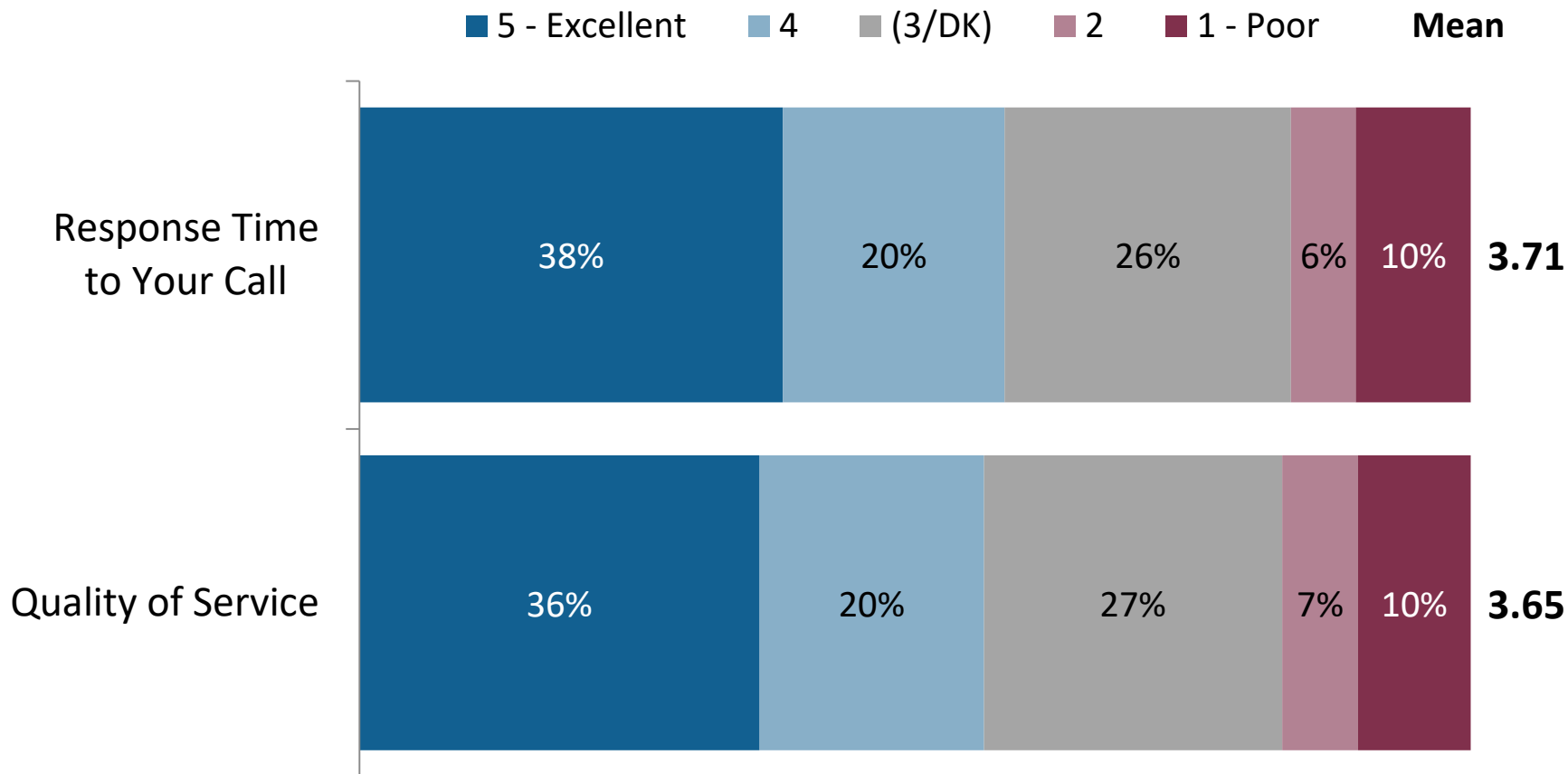
Q33. Have you ever contacted St. Paul Water?

Q34. How many calls did it take to solve the problem?

Satisfaction Ratings

Satisfaction ratings concerning a call to SPRWS receive a somewhat positive rating.

Among customers who called with
problem/complaint, **n=39**



Q37. On a scale of one to five, with one being poor and five being excellent, how would you rate the quality of the service you received when you contacted St. Paul Water?

Q38. On a scale of one to five, with one being poor and five being excellent, how would you rate the response time to your call?

Conclusions

Conclusions

- ▶ St. Paul Regional Water Service is a very highly regarded agency. Overall ratings are very strong, and the agency receives very high marks in all core job responsibilities tested in the survey. The ratings are high across all demographic groups, and across all regions of the service area.



Tom Patras

tom@emcresearch.com

614.827.9677

Jillian Prusa

jillian@emcresearch.com

614.827.9678

Service Area Region Definition

For analysis purposes, service area was coded into five regions:

▶ **Northwest**

- Includes: South Falcon Heights/Roseville, St. Anthony Park, Lexington/Hamline Neighborhood
- Zip Codes: 55104, 55108, 55113

▶ **Southwest**

- Includes: W. 7th area, Mac-Groveland & Highland Neighborhood
- Zip Codes: 55102, 55105, 55116

▶ **North Central**

- Includes: Downtown St. Paul; South Como/Frogtown; East Payne/Phalen neighborhood
- Zip Codes: 55101, 55103, 55117, 55130

▶ **South Central**

- Includes: South of Wabasha Bridge; North West St. Paul; Mendota Heights
- Zip Codes: 55107, 55118, 55120

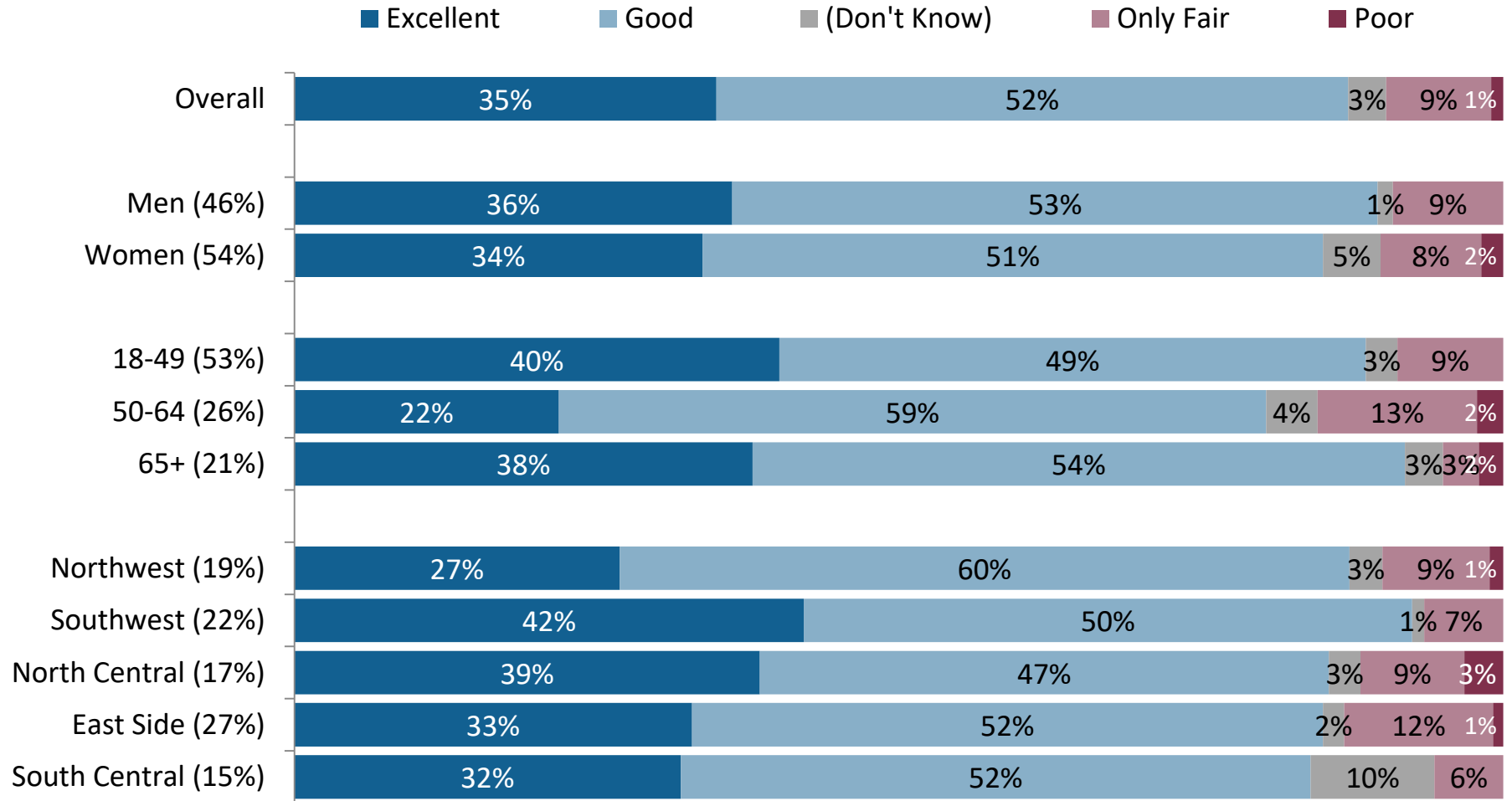
▶ **East Side**

- Includes: Battle Creek/Dayton's Bluff & West Payne/Phalen neighborhoods, Southeast Maplewood
- Zip Codes: 55106, 55109, 55119

SPRWS Job Ratings

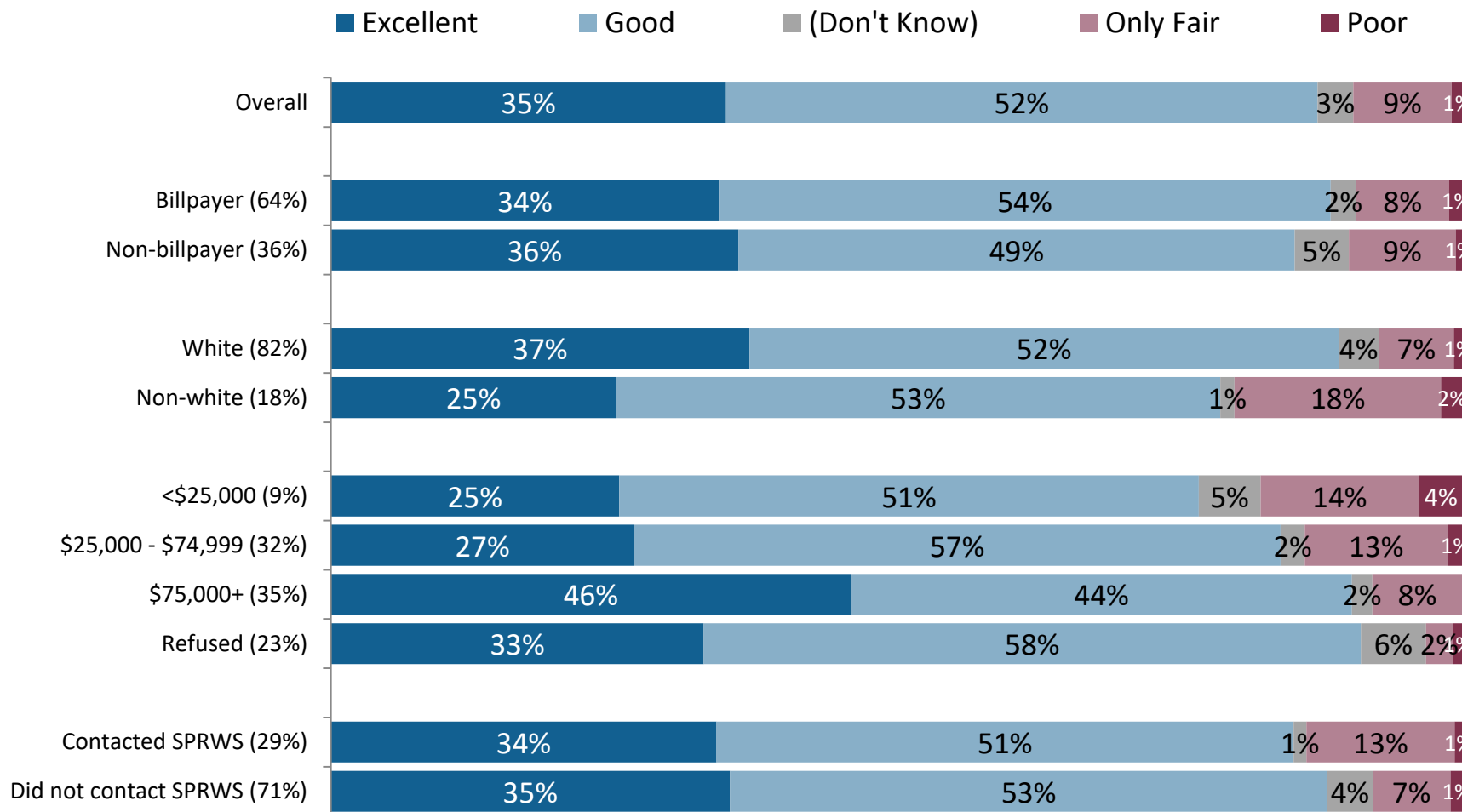
St. Paul Water Job Rating by Subgroups

SPRWS' rating is positive across all demographics.



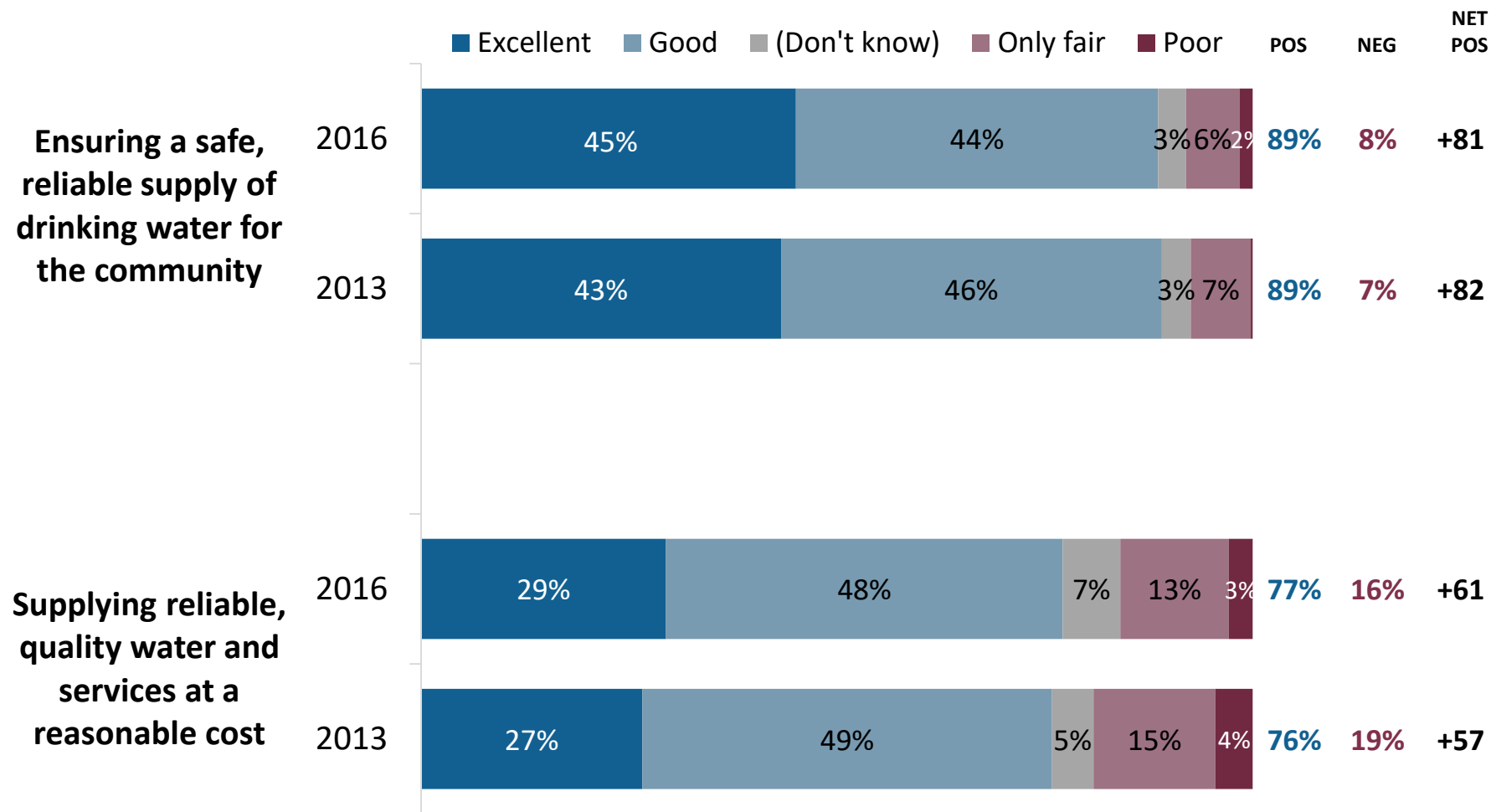
St. Paul Water Job Rating by Subgroups

The intensity of SPRWS' rating is lower among non-white and lower-income respondents, however the rating is positive across all demographics.



Job Rating: Water Reliability - Tracking

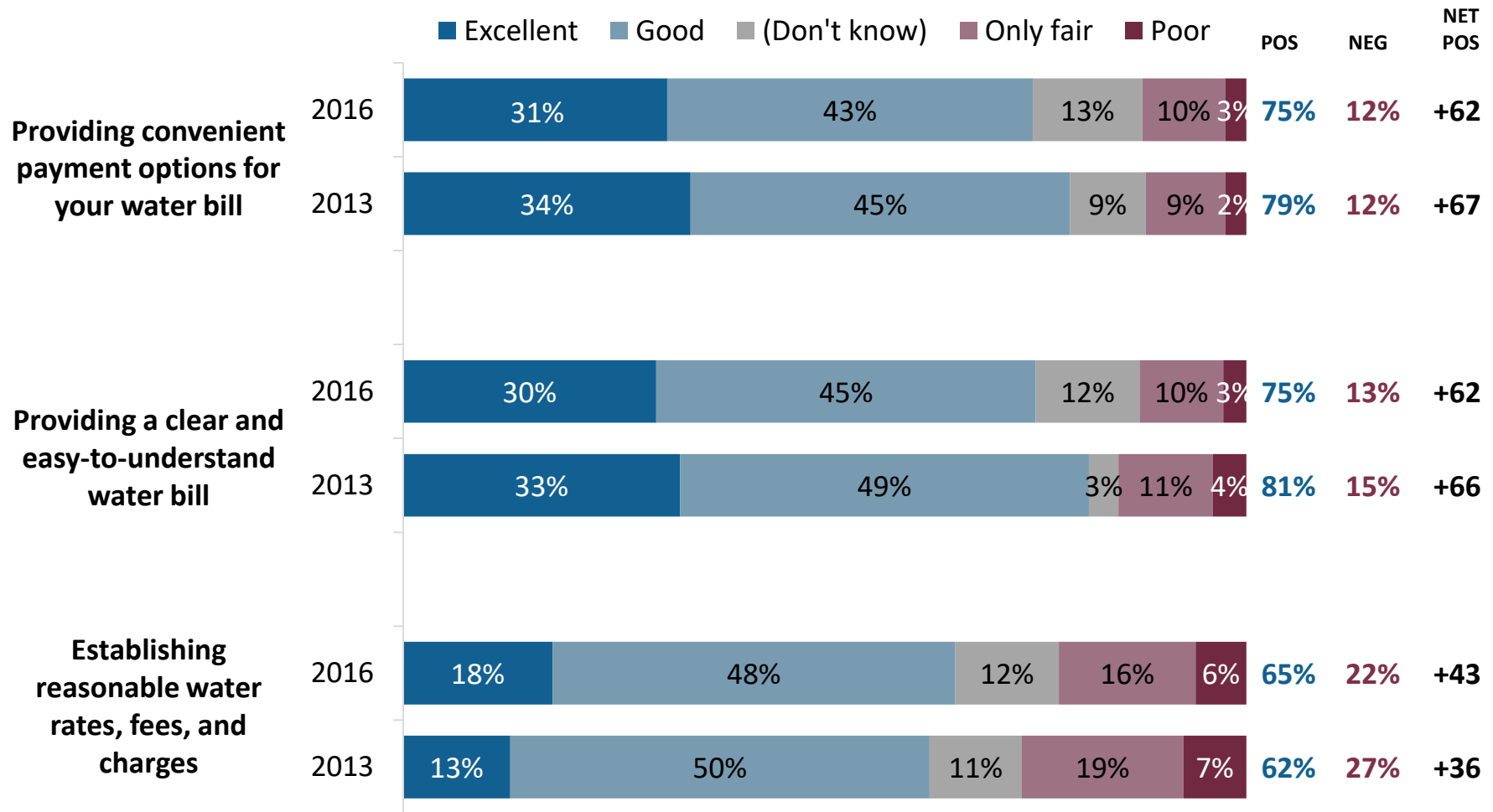
Ratings for water reliability remain stable across time.



Q3-10. Using a scale of excellent, good, only fair, or poor, please rate the job Saint Paul Water is doing on each of the following responsibilities.

Job Rating: Billing Responsibilities - Tracking

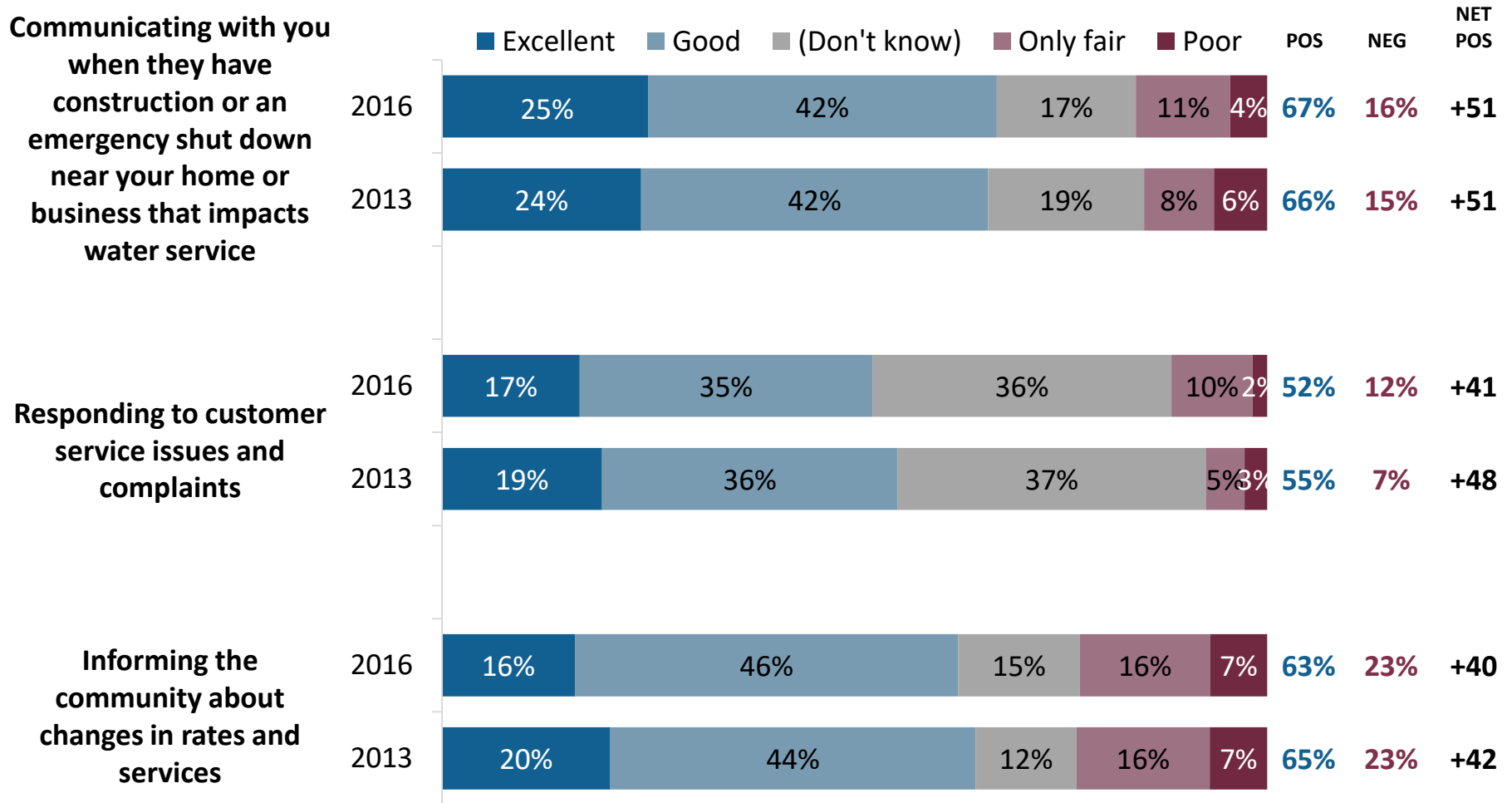
The net positive rating of “establishing reasonable water rates, fees, and charges” has increased by 7 points since 2013.



Q3-10. Using a scale of excellent, good, only fair, or poor, please rate the job Saint Paul Water is doing on each of the following responsibilities.

Job Rating: Communication - Tracking

Ratings for communication efforts remain stable across time.



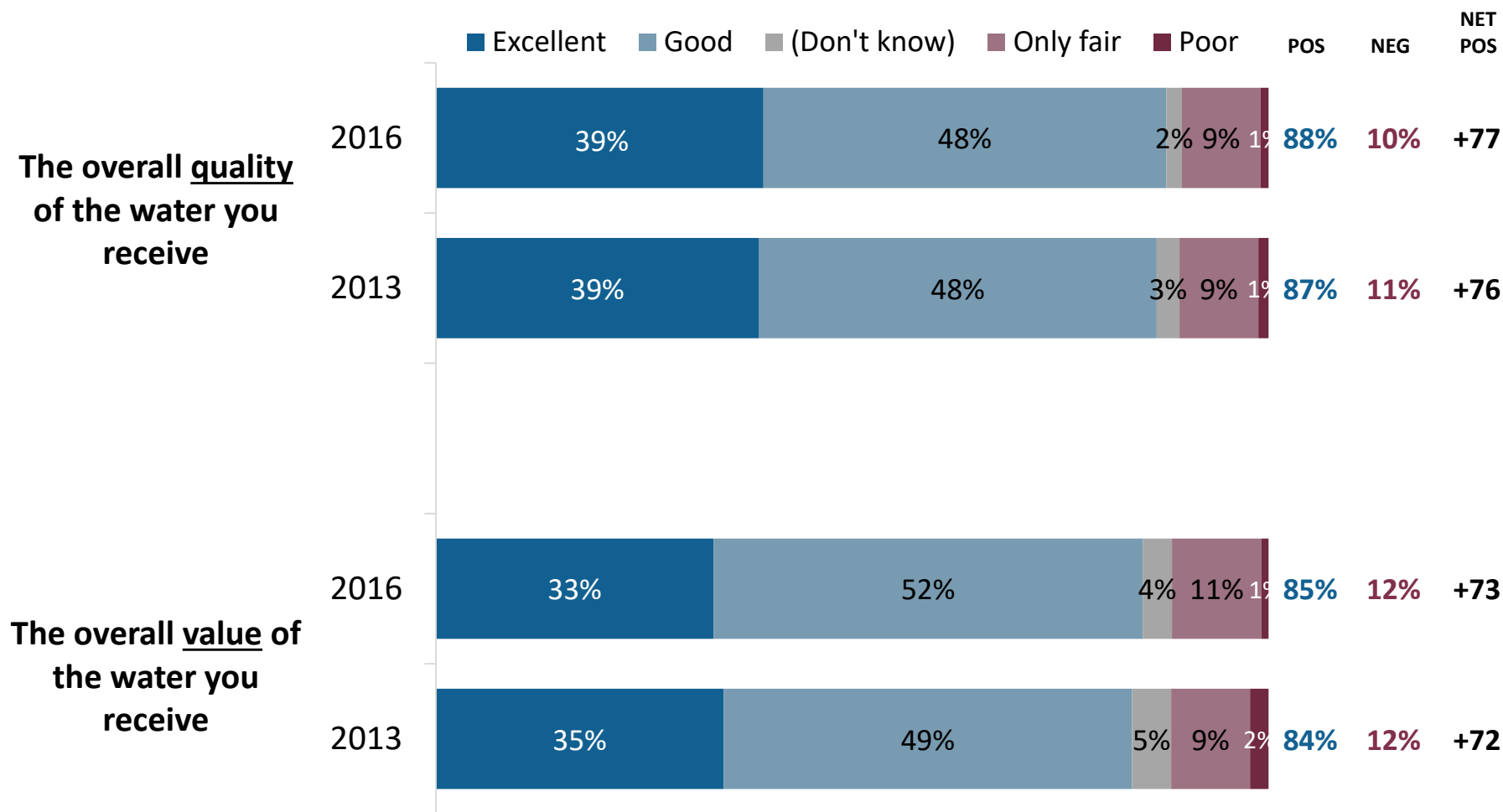
Q3-10. Using a scale of excellent, good, only fair, or poor, please rate the job Saint Paul Water is doing on each of the following responsibilities.



SPRWS Water Quality Ratings

Tap Water Ratings - Tracked

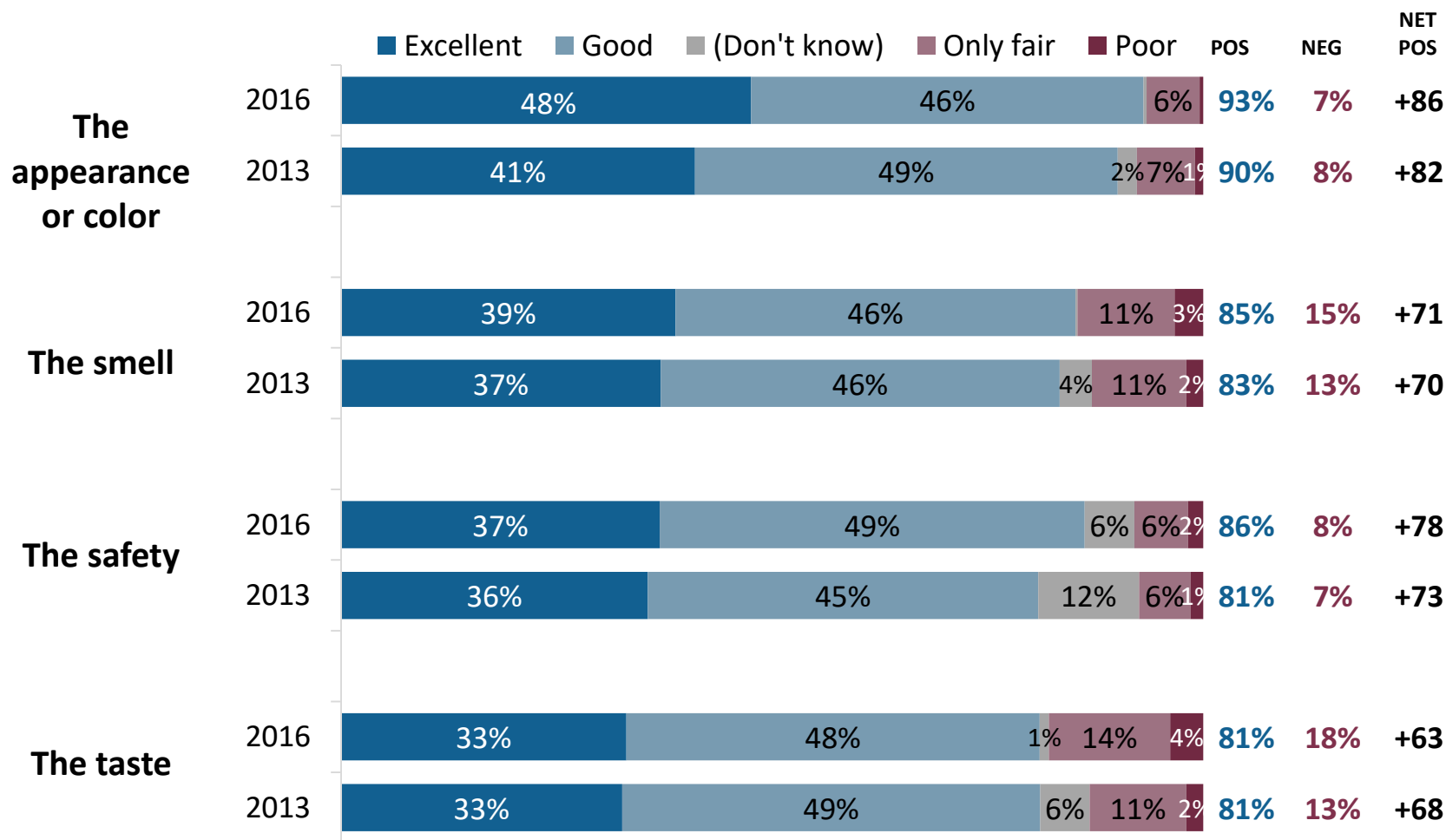
Ratings for tap water have held steady over time.



Q11-16. Thinking about your residence, using a scale of excellent, good, only fair or poor, please rate each of the following aspects of the tap water at your residence.

Tap Water Ratings - Tracked

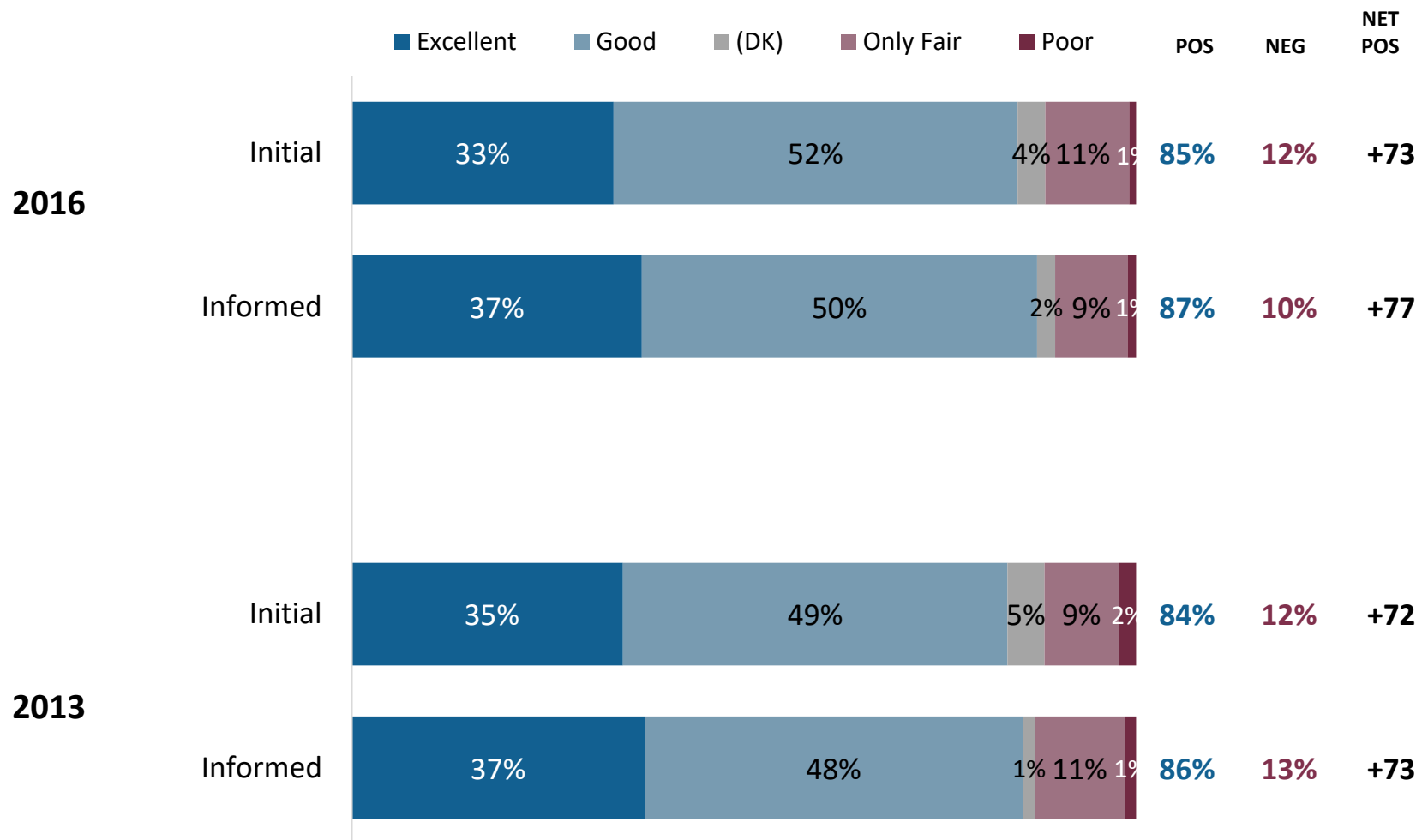
Ratings for aspects of SPRWS' tap water have increased or stayed the same since 2013.



Q11-16. Thinking about your residence, using a scale of excellent, good, only fair or poor, please rate each of the following aspects of the tap water at your residence.

Informed Tap Water Rating - Tracked

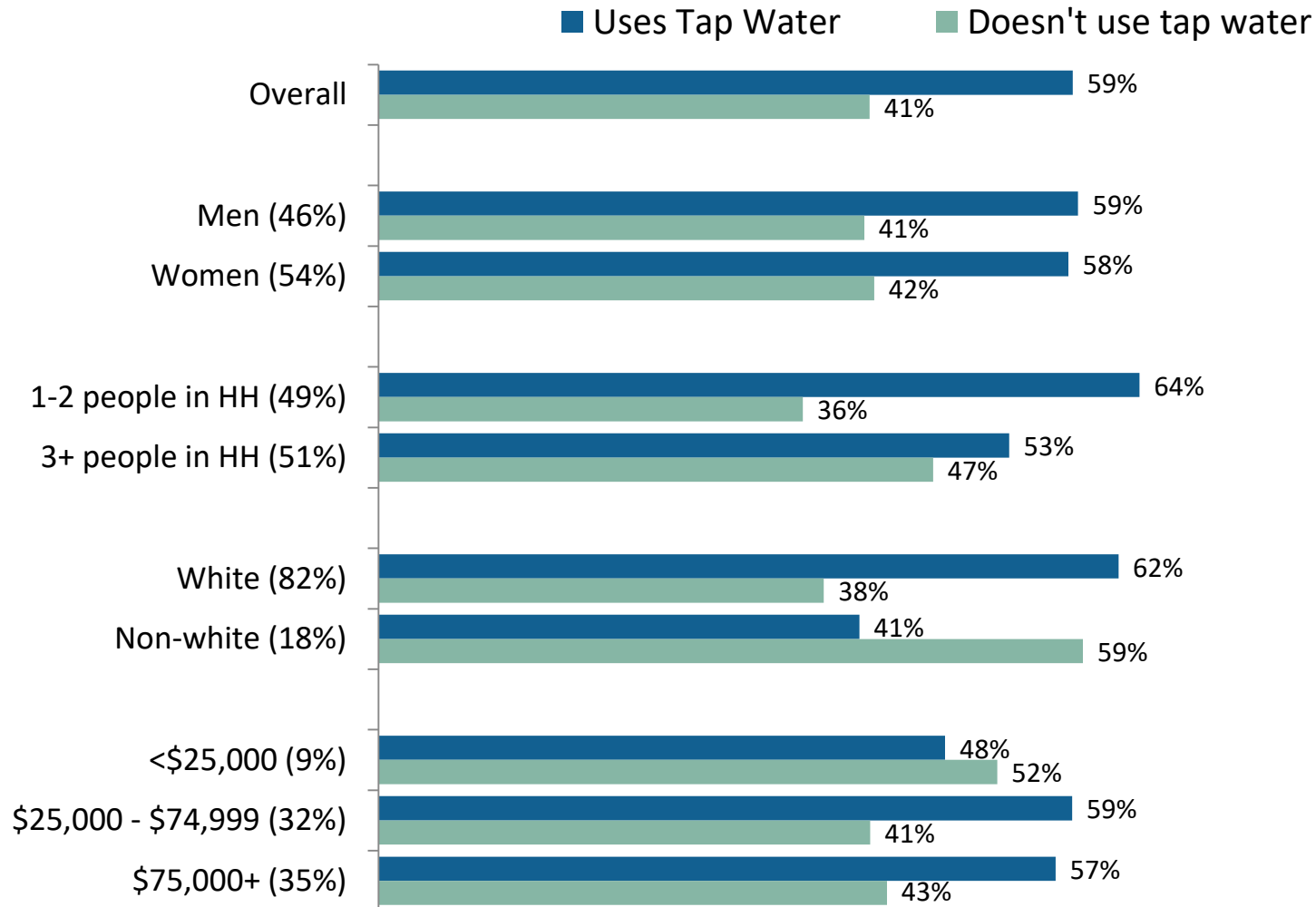
In 2016, the informed tap water net positive rating increases by four points, compared to the two points the rating increased in 2013.



Q17. As you may know, St. Paul Water receives no tax money, and the water rates and charges paid by you and other St. Paul Water customers are the sole source of funding for the treatment and delivery of your water. Given what you've just heard, now how would you rate the overall value of the water you receive – excellent, good, only fair, or poor?

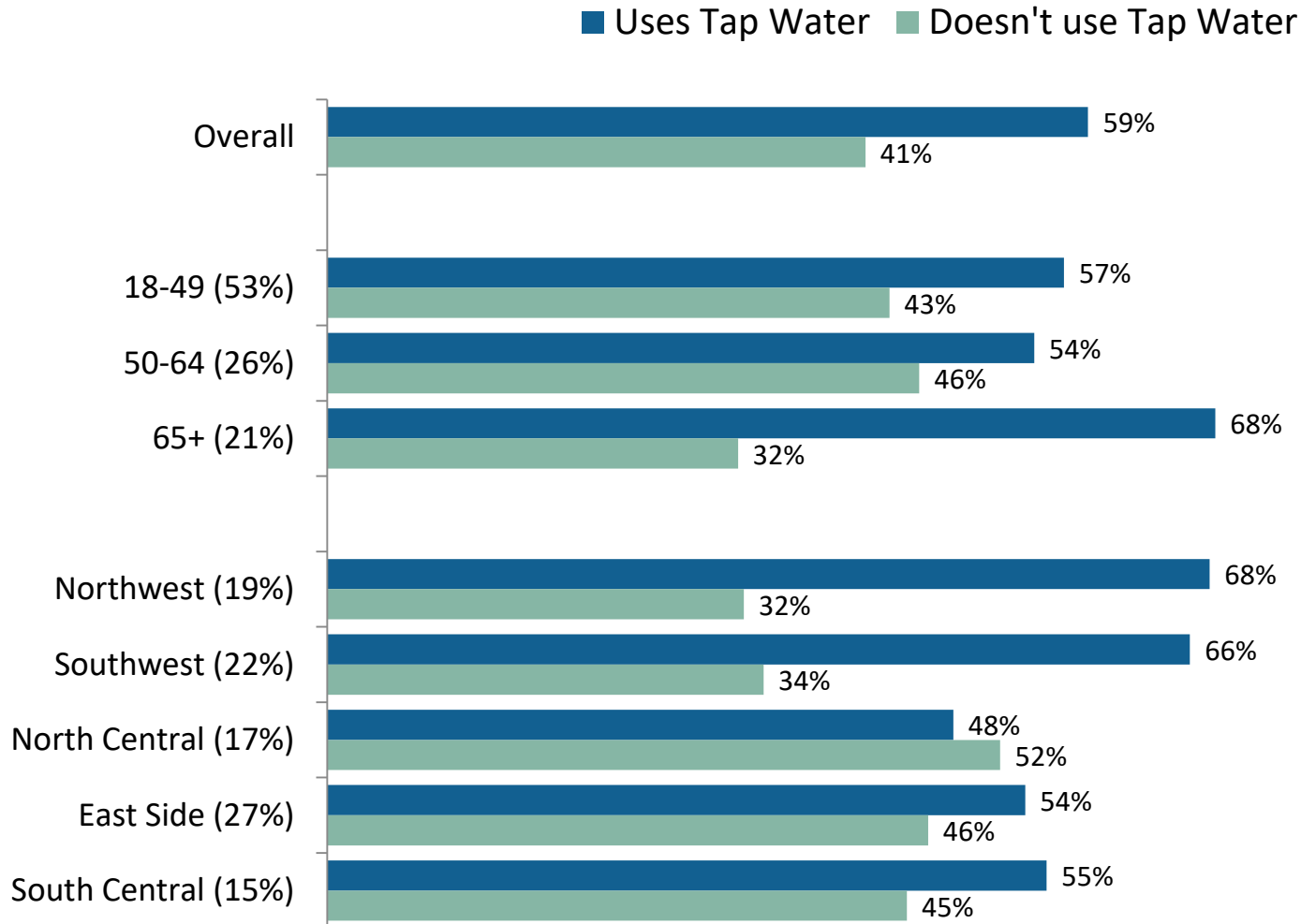
Tap Water Users by Subgroup

Non-white and lower income respondents are less likely to use tap water.



Tap Water Users by Subgroup

Respondents 65 and older and respondents in the NW and SW regions are more likely to mostly use tap water.

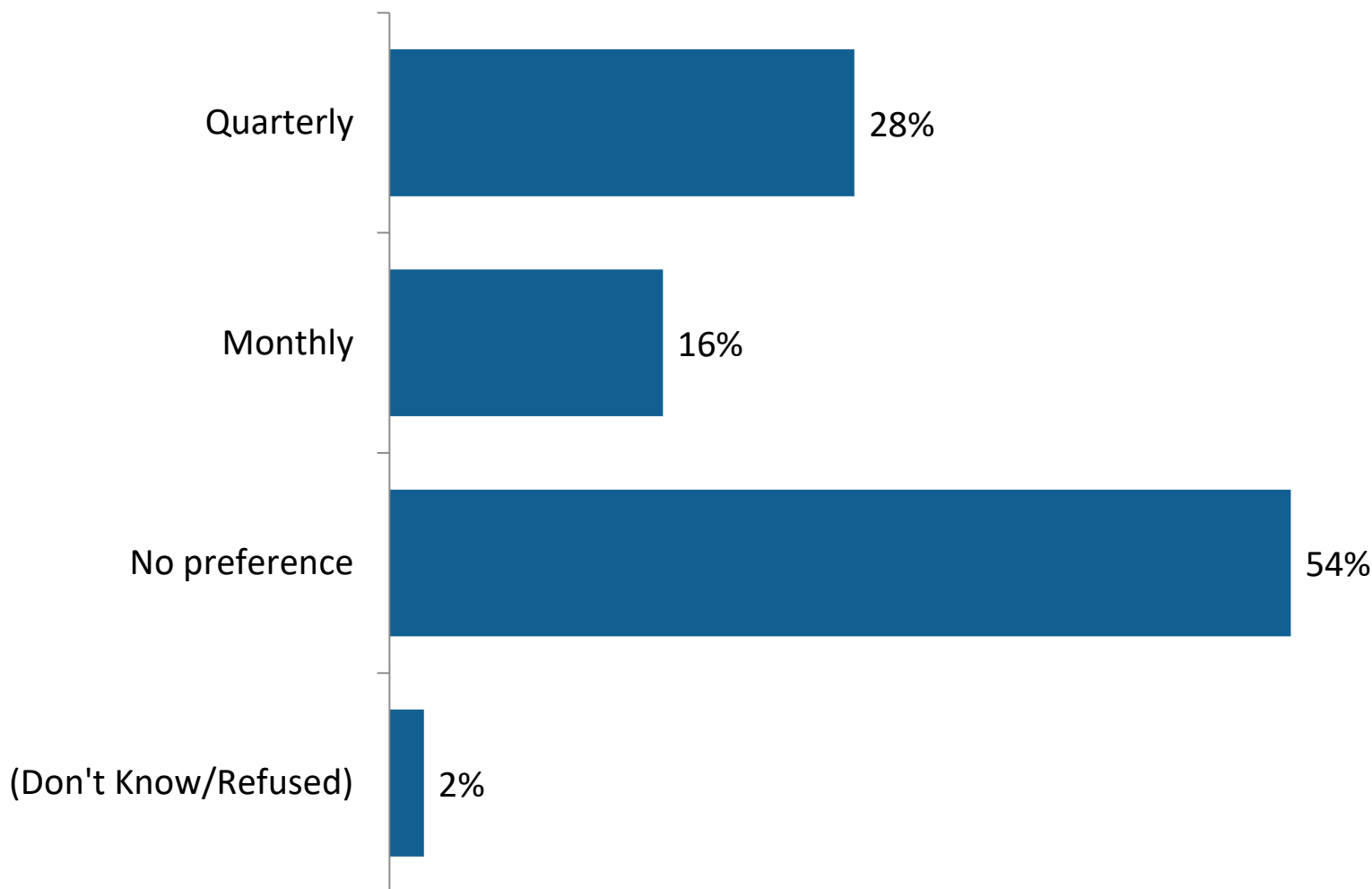




Billing and Payment Options

Billing Preference

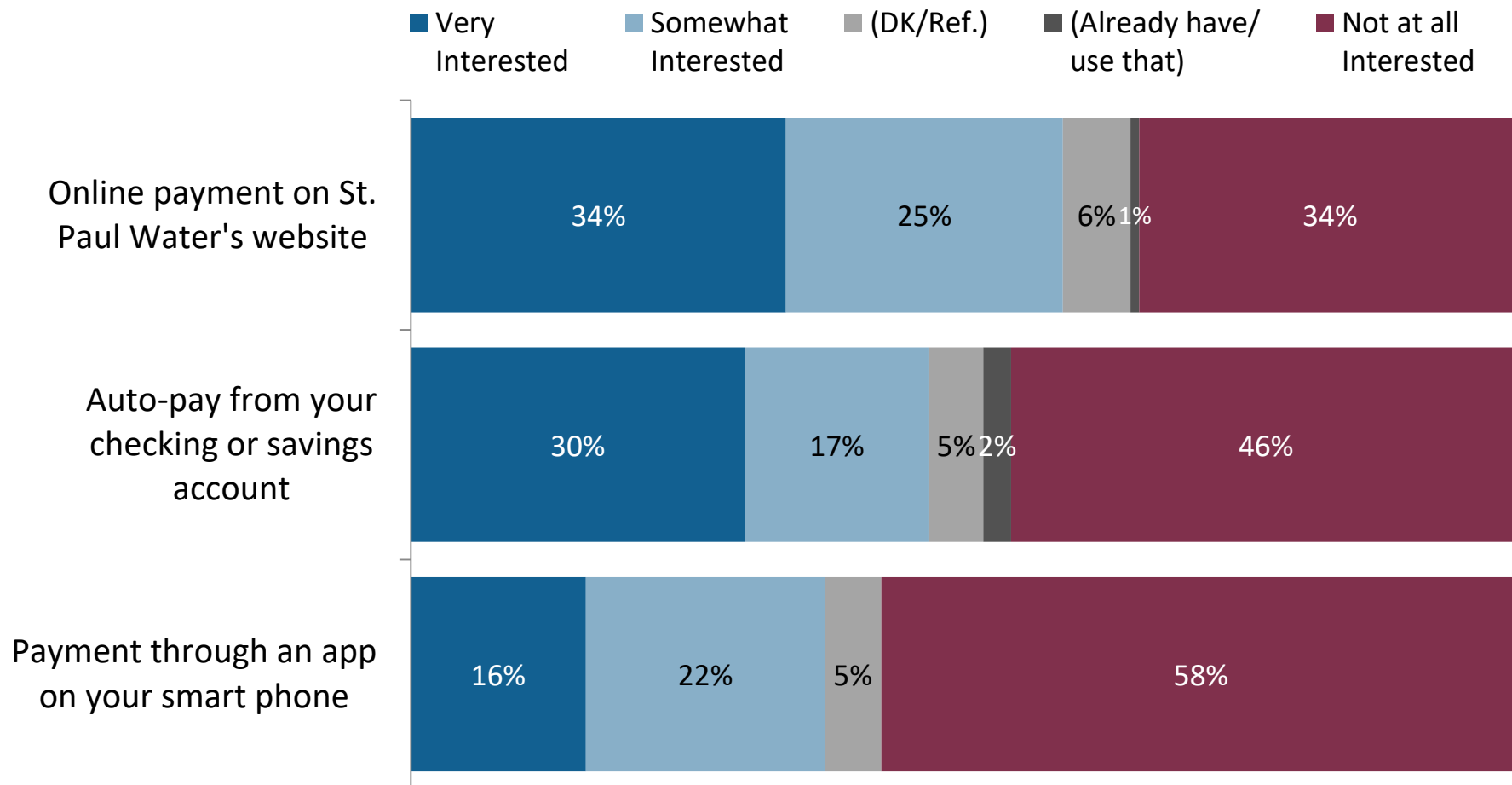
Over half of billpayers have no preference on billing time.



Q20. If you had a choice, would you prefer to be billed quarterly, monthly, or do you have no preference?

Potential Payment Options

Over half (59%) of respondents are interested in online payment options.

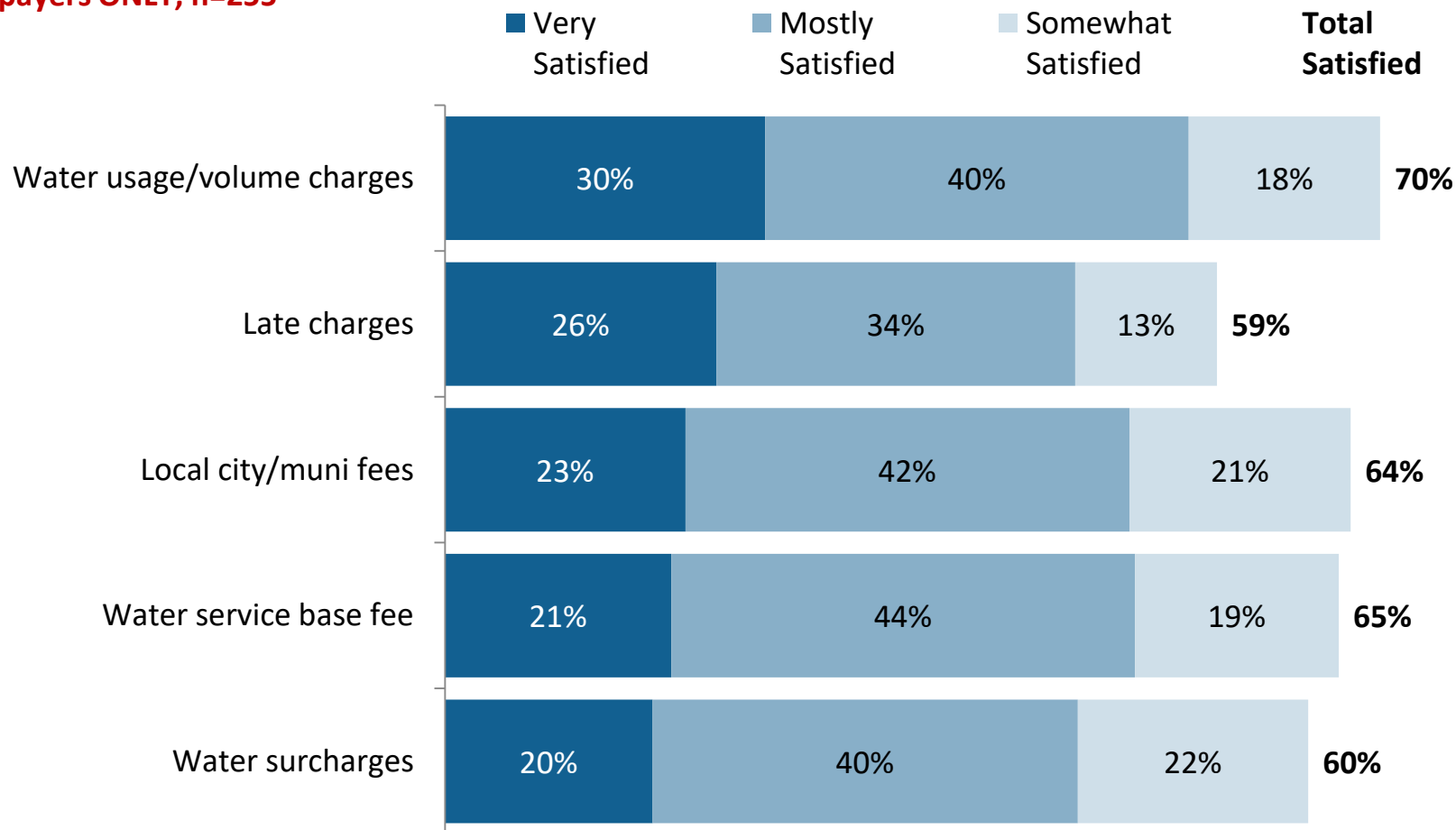


Q26-28. The following is a list of potential payment options for your water bill. Please tell me whether you are Very Interested, Somewhat Interested, or Not at All Interested in each option.

Water Bill Item Satisfaction

A majority of bill-payers are at least somewhat satisfied with each of the billing aspects tested in the survey.

Bill-payers ONLY, n=255

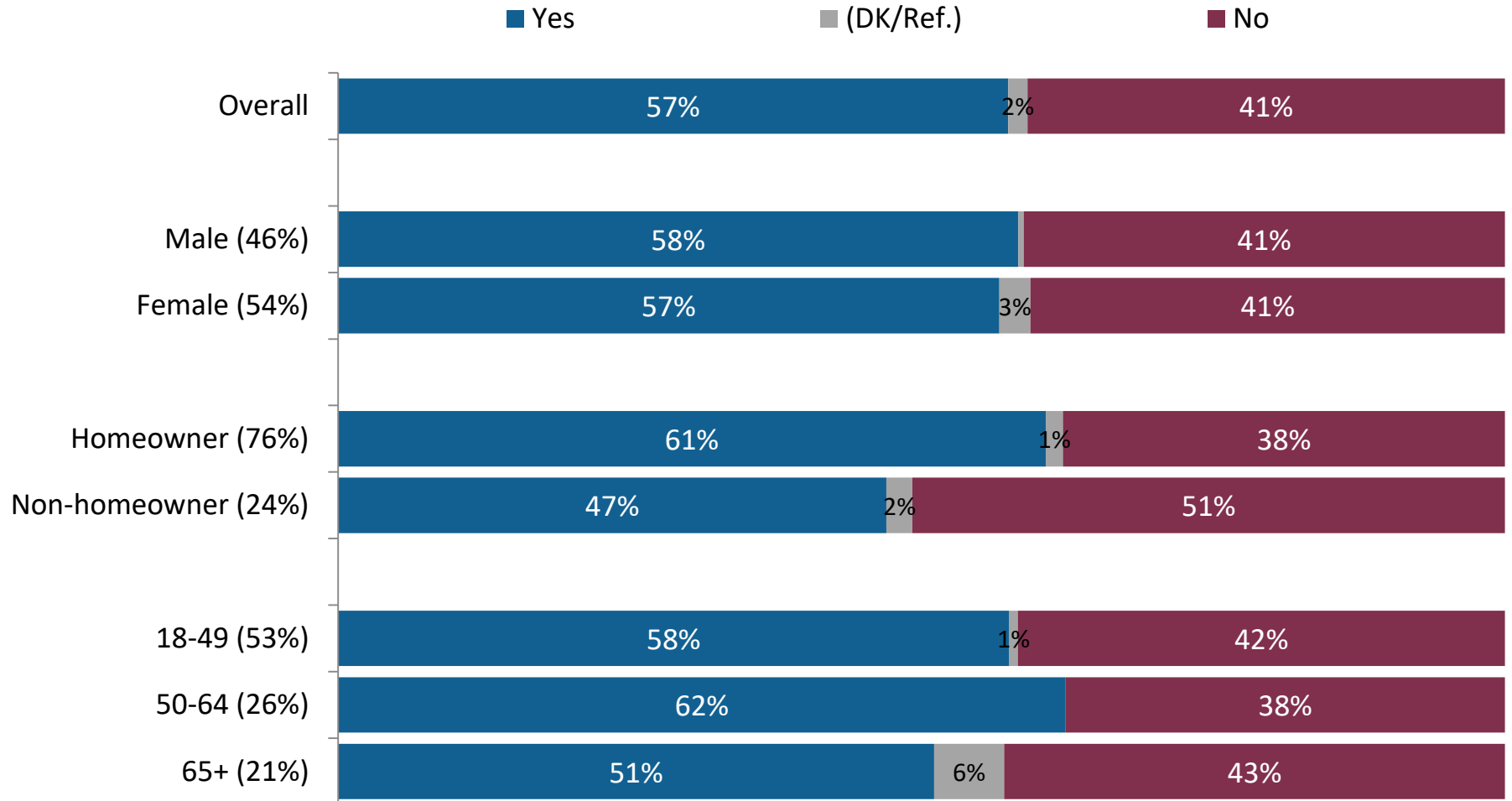


Q21-25. The following is a list of items that can be found on your water bill. Please tell me whether you are Very Satisfied, Mostly Satisfied, Somewhat Satisfied, or Not at all Satisfied with the explanation of each item on your water bill.

Lead Awareness

Interest in Lead Information

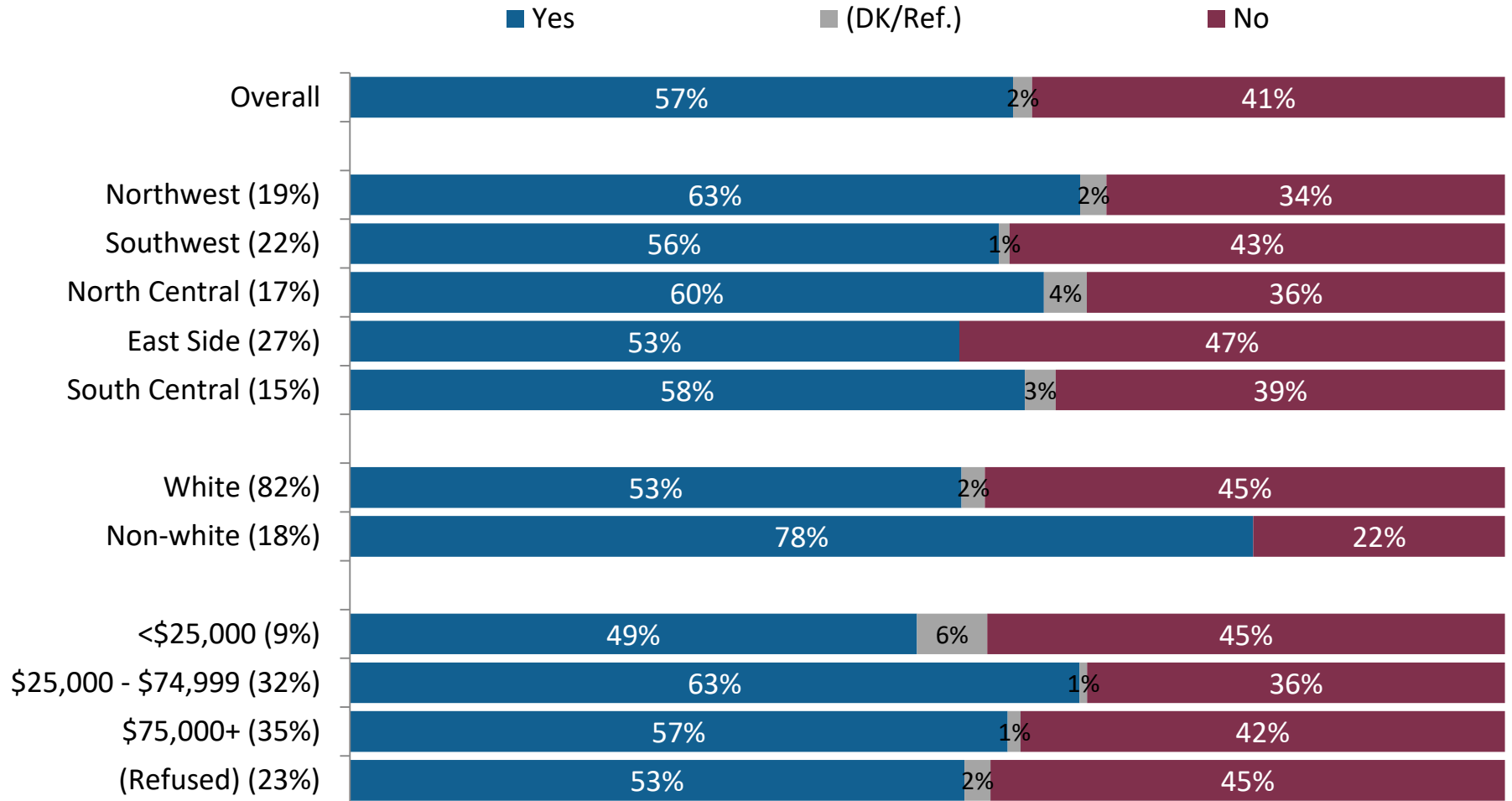
Homeowners and respondents under the age of 65 are more likely to be interested in information about lead in drinking water.



Q32. Would you be interested in having more information on lead in drinking water provided to you by Saint Paul Water?

Interest in Lead Information

Non-white respondents and mid- and higher-income respondents are more likely to be interested in receiving more information about lead in drinking water.



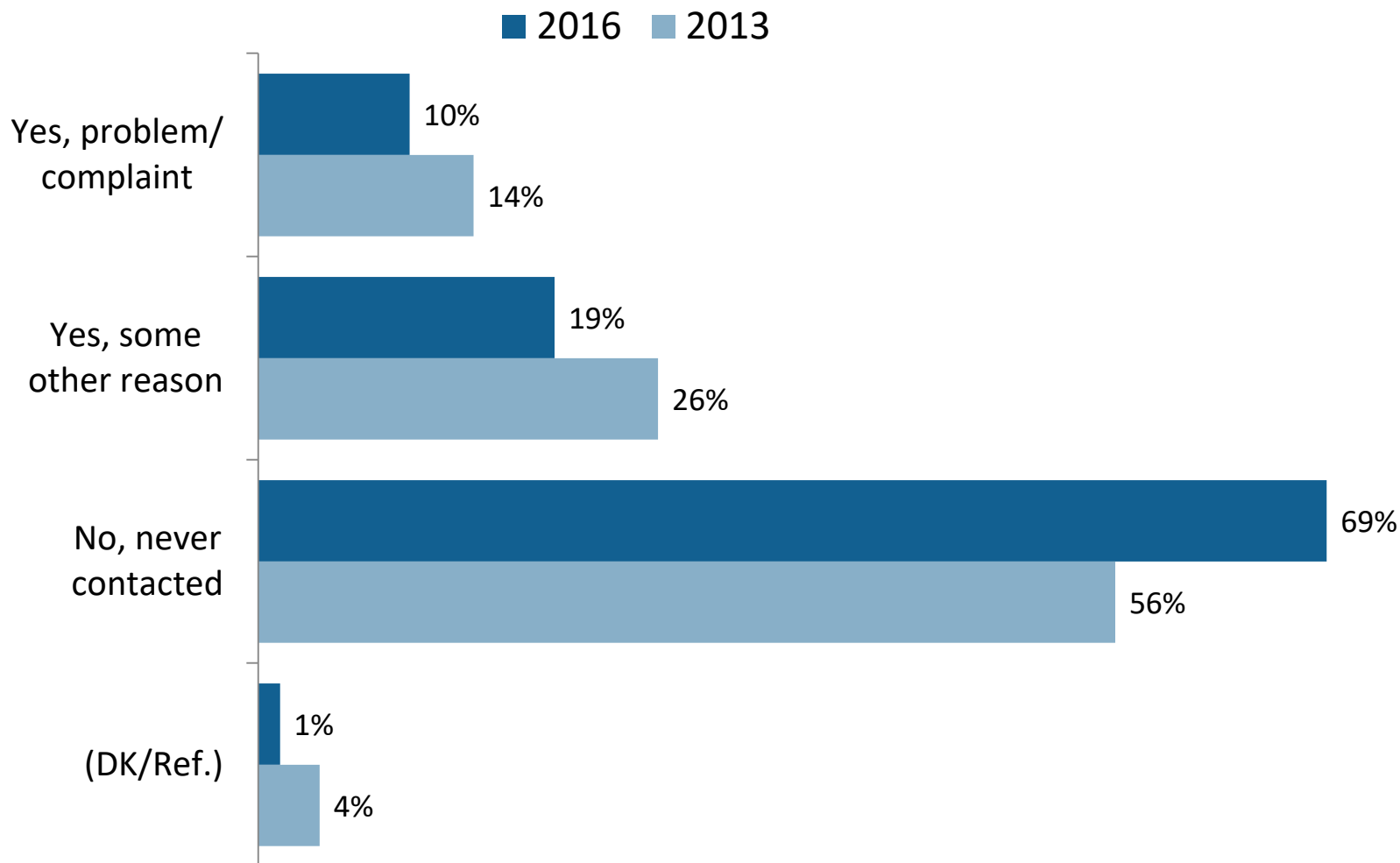
Q32. Would you be interested in having more information on lead in drinking water provided to you by Saint Paul Water?



SPRWS Customer Service Satisfaction

Contacting St. Paul Water - Tracked

Nearly seven out of ten (69%) respondents have not contacted SPRWS in 2016 – compared to 56% in 2013.

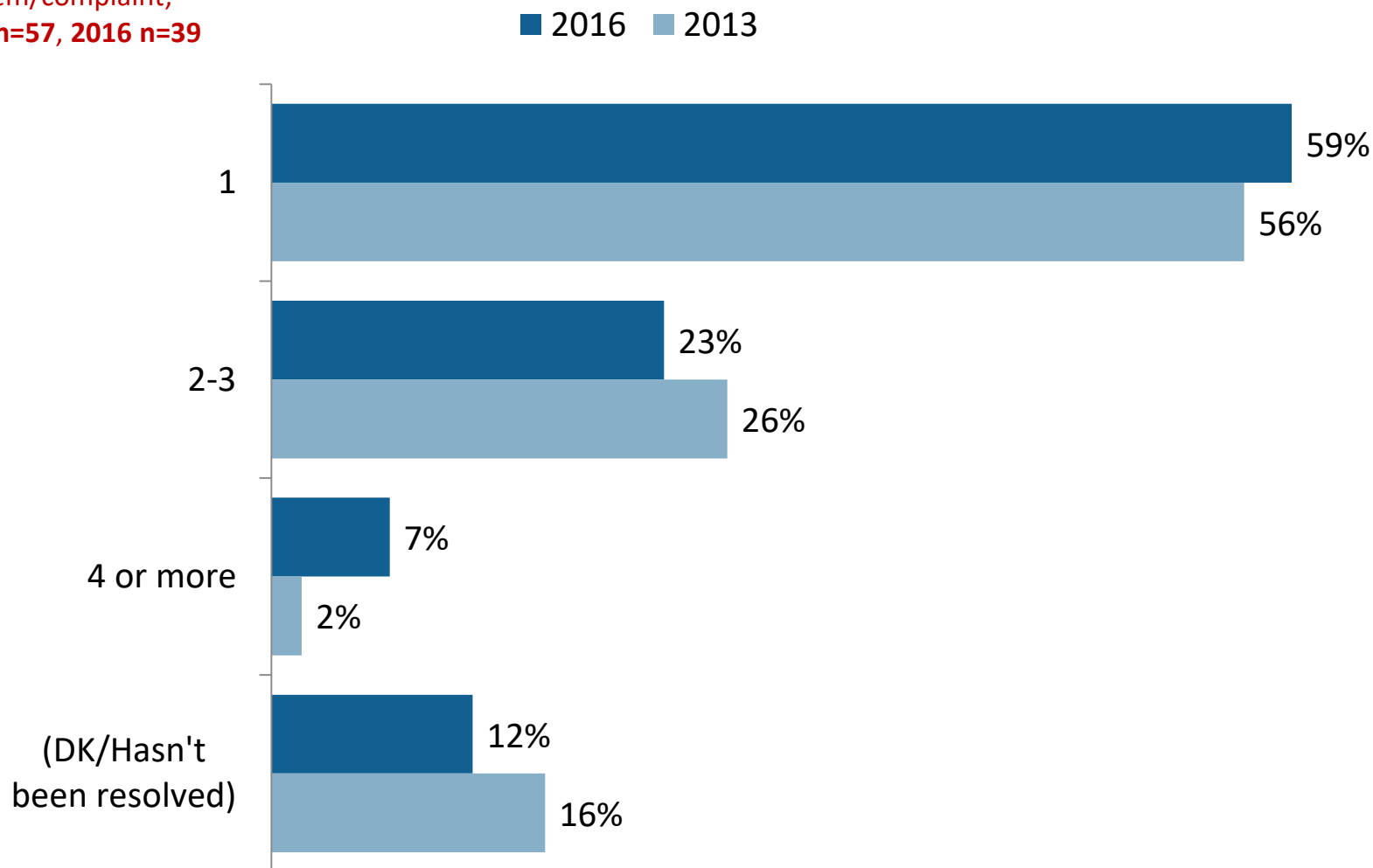


Calls to Resolve a Complaint – Tracked

The majority of issues and problems were solved with just one call to SPRWS.

Among customers who called with
problem/complaint;

2013 n=57, 2016 n=39



Q33. Have you ever contacted St. Paul Water?

Q34. How many calls did it take to solve the problem?

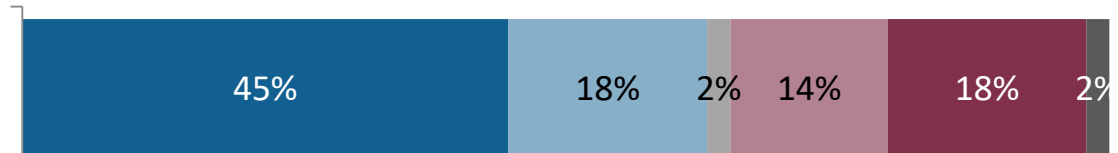
Satisfaction with Problem's Solution

Satisfaction with outcomes and the problem resolution process remains high.

■ Very Satisfied ■ Mostly Satisfied ■ (DK/Ref) ■ Somewhat Satisfied ■ Not at all Satisfied ■ (Problem wasn't resolved)

How satisfied were you with the outcome?

2016 called with complaint
n=39

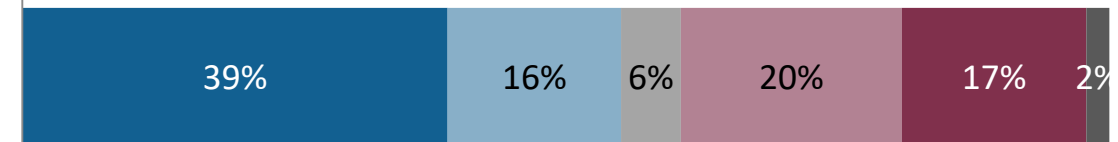


2013 called with complaint
n=57

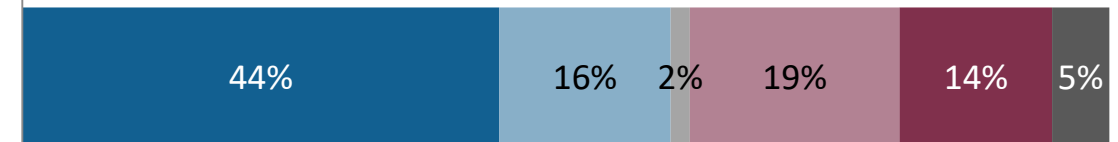


How satisfied were you with the process you went through to get the problem resolved?

2016 called with complaint
n=39



2013 called with complaint
n=57



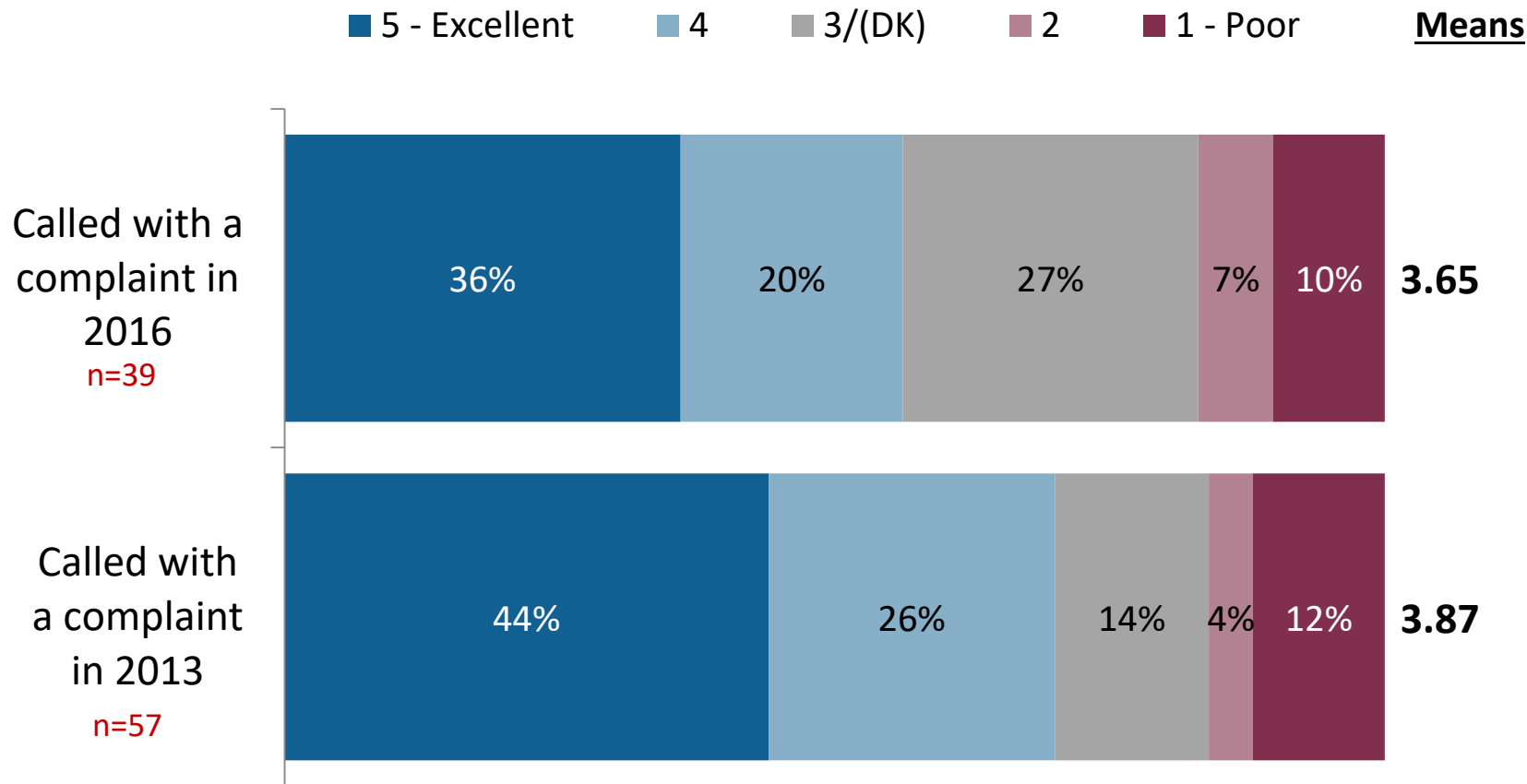
Q35. How satisfied were you with the process you went through to get the problem resolved?

Would you say you were...

Q36. How satisfied were you with the outcome? Would you say you were...

Quality of Service Rating – Tracked

Between 2013 and 2016, the mean customer service rating of those who called with a complaint decreased slightly – however the sample size is very small.



Q37. On a scale of one to five, with one being poor and five being excellent, how would you rate the quality of the service you received when you contacted St. Paul Water?