



CRITICALINSIGHTS

Portland Water District 2015 Customer Survey

Summary Report of Findings

Prepared for:



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Full Service Market Research and Public Opinion Polling

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Executive Summary

Executive Summary

Core Dimensions of Customer Satisfaction

- Overall satisfaction with the Portland Water District continues to be very strong, with more than 80% of customers claiming to be satisfied and close to 6-in-10 reporting being “very satisfied.”
 - These results are consistent with prior iterations of the study.
- Similarly, more specific areas of satisfaction continue to be strong as well, led by residents’ levels of satisfaction with their water service and with the quality of their water, respectively; each measure is at or near 9-in-10 customers being satisfied, with roughly 6-in-10 claiming to be “very satisfied.”
- In comparison to water service, while satisfaction with sewer service among those not on a private septic is also favorable overall, the proportion of customers claiming to be satisfied is less robust due to a sizable bloc of customers (roughly 2-in-10) either not responding to this item or claiming not to have an opinion.
- Satisfaction with price, both for water and for sewer, remain favorable, but continue to be more moderate than results observed for other measures of satisfaction, such as water quality.
 - Specifically, levels of satisfaction are more favorable for the price of water service than for prices associated with sewer service.
 - Close to three-quarters of customers continue to be satisfied with the price for water, while less than half respond similarly regarding the price of sewer service.

Executive Summary

Core Dimensions of Customer Satisfaction

- Among those customers offering an opinion or providing an answer, satisfaction with the quality of customer service provided by the Water District continues to be strong.
 - Over time, an increasing bloc of customers either has offered no opinion or declined to answer the question, suggesting that they lacked meaningful experience with PWD customer service.
- In comparing satisfaction levels for PWD and other service providers, the Water District continues to score very favorably in comparison.
 - The Water District's scores have been higher over time, but most closely resemble scores associated with the local electric utility; each provider scores at or above three-quarters of customers being satisfied, with PWD continually scoring slightly better.
 - Satisfaction levels for PWD continue to rank above local municipal government, phone providers, and – especially – cable or other pay TV providers.

Assessment of Water Quality

- As seen in the broader core measure of satisfaction with water service, PWD's specific water quality dimensions continue to be strong across the board.
 - PWD continues to receive exceedingly strong scores for clarity/colorlessness, absence of any odor, perceived safety, water pressure, and lack of chemical taste or aftertaste.
 - Scores are slightly less robust for the belief that the water meets or surpasses all regulations, but as in past measurements, the differences relative to other measures can be attributed to customers either not responding to this item or not having an opinion, on the measure likely due to uncertainty about specifics surrounding the regulations.

Executive Summary

Dimensions of Organizational Reputation and Image

- Overall, the vast majority of customers (more than 8-in-10) have a positive feeling about the Water District.
- In terms of specific dimensions of image, PWD continues to be viewed most favorably for serving the public well, for providing good value, and for being experienced/knowledgeable.
- While overall results are still very favorable among those customers offering an opinion on the remaining measures, there is some level of uncertainty about the Water District being an organization that is well-run, trustworthy, environmentally-focused, keeps the public informed, and active in the community.
 - For these measures, sizable blocs of customers continue to choose to either not offer a response or claim to not have an opinion, resulting in less robust proportions of customers who claim to agree with the respective organizational dimensions.
- The 2015 study also asked customers to evaluate PWD on a number of different attributes that may or may not be seen as describing the organization.
 - Across the tested dimensions, the largest proportion of customers believe PWD is *safe* and *reliable*, respectively, while strong majorities also see the organization as *professional* and *knowledgeable*.
 - Notably, regarding costs, a strong majority believe the term *affordable* describes PWD and less than one-quarter would characterize it as *expensive*.
 - Interestingly, while few see PWD as *old-fashioned*, the organization as not seen by many customers as being *modern*.

Executive Summary

Assessment of Issue Importance

- Issue importance was treated differently in the 2015 study than in past years of the study, with customers being asked in the current study to hierarchically ‘rank’ the relative importance of a number of different dimensions.
- By a wide margin, water quality was deemed to be the most important dimension measured in the survey, with the vast majority of customers ranking this attribute as either the 1st or 2nd most important attribute.
- Protection of the watershed, consistent/reliable service, and low rates formed the next tier of issue importance, with customer service and water conservation/‘green’ initiatives deemed to be of comparatively lesser importance to customers.
- Consistent with a lesser level of importance assigned to conservation and ‘green’ initiatives, reported activity around water conservation is only moderate, with roughly half of customers claiming to have done things like repaired leaks and/or leaky fixtures and reduced their outside water use; activities such as making a reduction in indoor water usage and upgrading appliances or fixtures to conserve water were a bit lower, with roughly 4-in-10 customers claiming to have done these things.

Executive Summary

Awareness and Usage of PWD Service Options

- Awareness and usage of different service options available to PWD customers has grown over time across measurements, with the largest growth – both in terms of consumer awareness and in reported usage – seen for paperless billing (where reported usage has doubled among survey respondents since the 2011 measurement) and online payments (where usage has tripled since 2008).
- Both awareness and usage of online change of address forms has grown since 2011, though usage continues to be fairly limited, while awareness for accessing automated account information via phone has remained generally stable over time and usage remains very limited.
- When asked to consider some new service options under consideration at the PWD, the tested options showing the greatest level of potential usage among customers include receiving advance notices of a possible high bill and appointment reminders, respectively.
- While receptivity to other options was more limited overall, younger residents appear a bit more receptive to accessing daily water usage information online and using a Smartphone app to pay bills; engagement with these options is more limited among older customers.

Executive Summary

Dimensions of Customer Service

- Over time, majorities of customers have continued to see the PWD as responding quickly in an emergency, and also communicating with customers in the event of a necessary shut-off; however, sizable blocs of customers have registered ‘No opinion’ or declined to answer these measures, a likely indication of an absence of experience and a resulting inability to render an opinion.
 - Importantly, very few customers see the PWD as not responding quickly to emergencies or failing to notify customers about times when the water would need to be shut off.
- A majority of customers also believe the Water District produces error-free bills and few disagree, yet a sizable bloc of customers also had no opinion or did not answer the question.

Activity Around Communications

- A strong majority of customers (more than 8-in-10) read the Water District’s informational pamphlet material at least occasionally.
- As a means of communication with customers, increased Internet access has resulted in a rise in customers claiming to visit the Water District’s website (*www.pwd.org*); since 2000, the proportion of customers reportedly visiting the site has risen from 3% to 40% presently.
 - The principal reasons for visiting the site involve billing-related matters – such as paying a bill or seeking an answer to a billing question – followed by informational needs (about things like usage) and simple interest and curiosity (about things like Sebago levels and water quality).

Report of Findings

Study Background

Study Background

Study History and Purpose

- As an organization, Portland Water District (“PWD”) is committed to ongoing customer measurement and, as such, has been conducting cross-sectional surveys among its customers to gauge levels of satisfaction and perceptions of service quality for well over a decade.
- This report represents results for what can be considered the 2015 round of measurement for PWD’s “Customer Survey,” an effort which dates to 1996.

Study Approach

- As in prior years, this round of the study involved the collection of data from PWD customers via a self-administered survey sent (and returned) via mail to a random sampling of customers.
- Please see the “Sampling and Data Collection” section for additional details concerning the execution of this round of measurement.

Study Background

Survey Topic Areas

- Given the study's lengthy tenure and PWD's desire to track customer sentiment across a number of key metrics, the 2015 study covered many of the same topics and included many of the same questionnaire items as prior measurements.
- Consistent with past rounds of the study, the current measurement included topics and associated measures concerning satisfaction, water quality, services (current and potential), communication, and customer service assessment.
- Some topic areas were restructured slightly in terms of data collection or included entirely new questionnaire items, including dimensions of service importance, organizational reputation and image, and customer activity around water usage and conservation.
- The final questionnaire was developed collaboratively by Critical Insights and PWD personnel.

Study Background

Sampling and Data Collection

- As in the most recent iteration of the study in 2011, the study aimed to gather opinions only among PWD residential customers.
- Given this objective, no business accounts or residential accounts for large multi-unit residences (such as apartment buildings) where billing contacts are commercial entities were included in the study design for 2015.
- Operationally, PWD provided a complete list of more than 46,000 residential customer records reflecting the above parameters, from which Critical Insights drew 1,200 customers at random to be included in an outgoing mail solicitation for participation in the 2015 study.
- As in past years, a survey packet (containing an introductory letter from PWD on organizational letterhead, the questionnaire booklet, and a stamped reply envelope) was mailed to these 1,200 customers.
- Also consistent with prior studies, responding customers were invited to complete a detachable form and include it with their survey reply to be entered into a drawing for a \$200 Hannaford gift card.

Study Background

Sampling and Data Collection (Cont.)

- Operationally, the survey packet was printed and compiled in late January of 2015 and was mailed on January 29, 2015 to all 1,200 records in the randomized customer file, with recipients asked to reply within two weeks (by February 12, 2015).
- As surveys were being returned in early February, a postcard was also sent on February 12th, reminding customers of the study and requesting that they return their survey from the initial mailing by February 19th.
- From the 1,200 outgoing mail pieces, a total of 267 completed surveys were returned. Several surveys were returned blank (or largely blank) and were not included in the final study sample. Returned questionnaires were accepted into the second week of March, given a lower than expected rate of return and also events outside the control of Critical Insights that the company believes negatively impacted various components of the study process, from outbound mailing to overall interest and receptivity in survey completion.

Study Background

Sampling and Data Collection (Cont.)

- The return of 267 questionnaires reflects a 22% cooperation rate, lower than in past years.
- Unfortunately, the period of data collection for the 2015 iteration of the PWD “Customer Survey” was characterized by fairly consistent poor weather, including several significant snow events, all of which we believe contributed to lower-than-expected participation in a study whose approach was consistent with past efforts that achieved a more robust level of cooperation.
- Feedback and field intelligence have suggested that weather-driven challenges impacted delivery of both the initial survey packet and the reminder postcard, as well as affected recipients’ ability to return their survey in a timely manner. Additionally, incoming communication from several customers suggested a level of frustration with the weather which we believe negatively affected customers’ interest in taking part in the study.

Study Background

Sampling Error and Matters of Statistical Significance

- The level of sampling error associated with a sample of 267 returned questionnaires is +/- 6.2 percentage points, at 95% confidence.
- As a means of illustration and interpretation, if the study here were replicated 100 times, in 95 out of these 100 replications, the results obtained for a proportional questionnaire item would theoretically fall within 6.2 percentage points of the results shown here. As an example, on a 50% proportion, the statistically “true” response would be between 43.8% and 56.2%.
- Given the sample sizes of past iterations of this study, the sampling error (again, at 95% confidence) associated with these efforts were generally between +/- 4.7 and 4.9 percentage points. The differences in sampling error between the 2015 results and any prior studies is considered in any analysis of year-over-year data, with different levels of precision accounted for in the comparative analysis of any trend data reported here.

Study Background

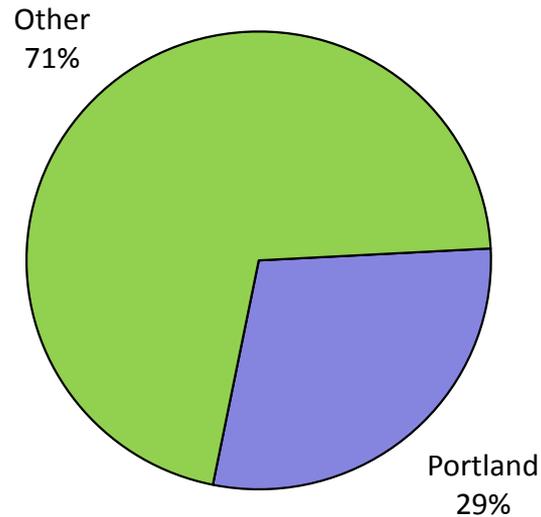
Analysis According to Customer Demographics and Classifications

- In addition to year-over-year trend analysis (where appropriate), data from the current study has been examined according to demographic and classification groups of relevance.
- As in past years, data has been examined according to basic demographics such as gender, age, and the presence of children, as well as classification variables such as geography (Portland vs. non-Portland customers) and service type (water only vs. water and sewer service). Only statistically-significant differences (again, confidence intervals at the 95% level) are noted in this report, unless otherwise specified as directional-only differences.

Research Results

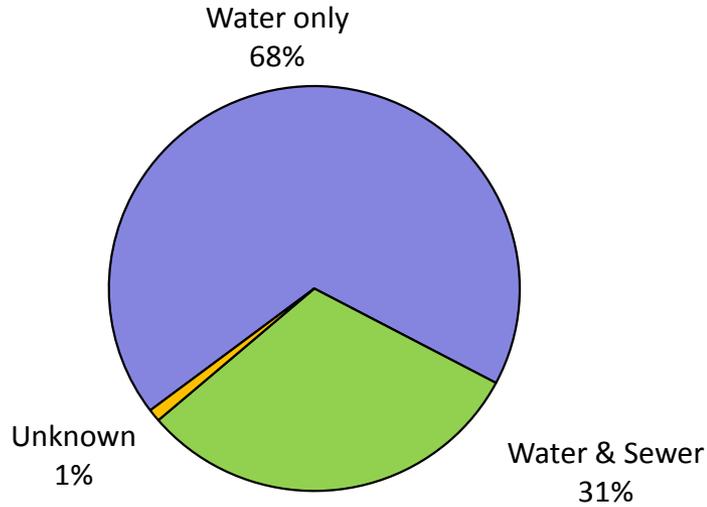
Customer Profile and Classification

Geographic Profile

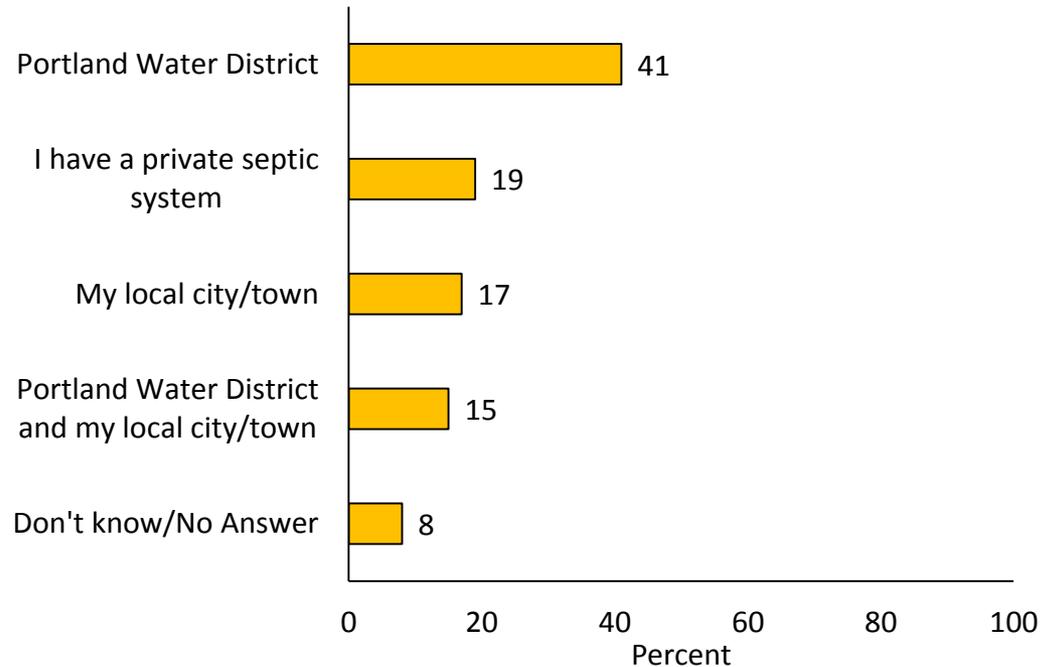


In examining internal customer billing and service address data, roughly 3-in-10 respondents (29%) are in Portland proper, with the remaining sample (71%) made up of customers from other PWD-served communities.

Water/Sewer Service Provider



Question 3: Who provides your sewer service?



Interestingly, while internal customer data for survey respondents indicates that PWD has involvement in sewer service for 68% of responding residents, there is a slight discrepancy with customers' beliefs about who is involved with their service.

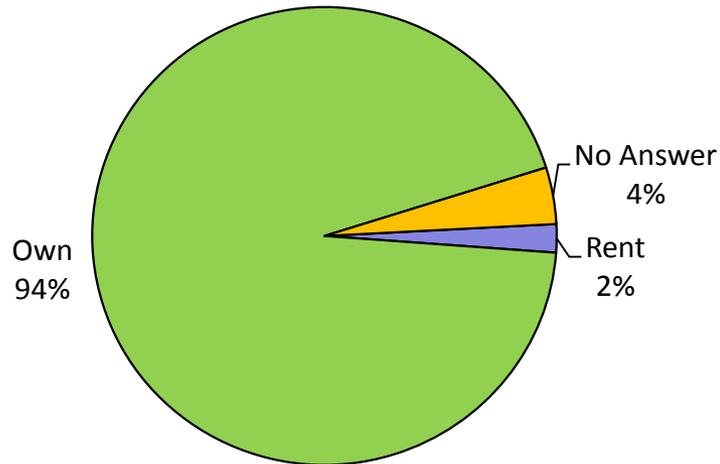
42% of respondents believe their sewer service is provided by the Water District, while another 15% claim it is jointly provided by PWD and their local municipality and 17% solely by the municipality.

Water/Sewer Service Provider: By Community

Sewer Provider (from Question 3)	Cape Eliz. n=23	Cumb. n=14	Falm. n=13	Gorh. n=20	Port. n=83	Scar. n=32	So. Po. n=39	West. n=26	Wind. N=12	Stand. n=4	Other n=2
Portland Water Dist.	17%	36%	36%	40%	71%	9%	38%	36%	8%	--	--
Local city or town	9%	--	27%	10%	--	72%	28%	15%	--	--	--
PWD and local city/town	26%	14%	9%	20%	17%	--	21%	15%	--	--	--
Private septic	35%	36%	27%	25%	1%	6%	5%	31%	92%	100%	100%
Don't know	9%	7%	--	--	8%	9%	8%	4%	--	--	--
No answer	4%	7%	--	5%	2%	3%	--	--	--	--	--

Ownership/Rental Status

Question 20: Do you currently rent or own the property at the service address noted on the letter that accompanied this survey?

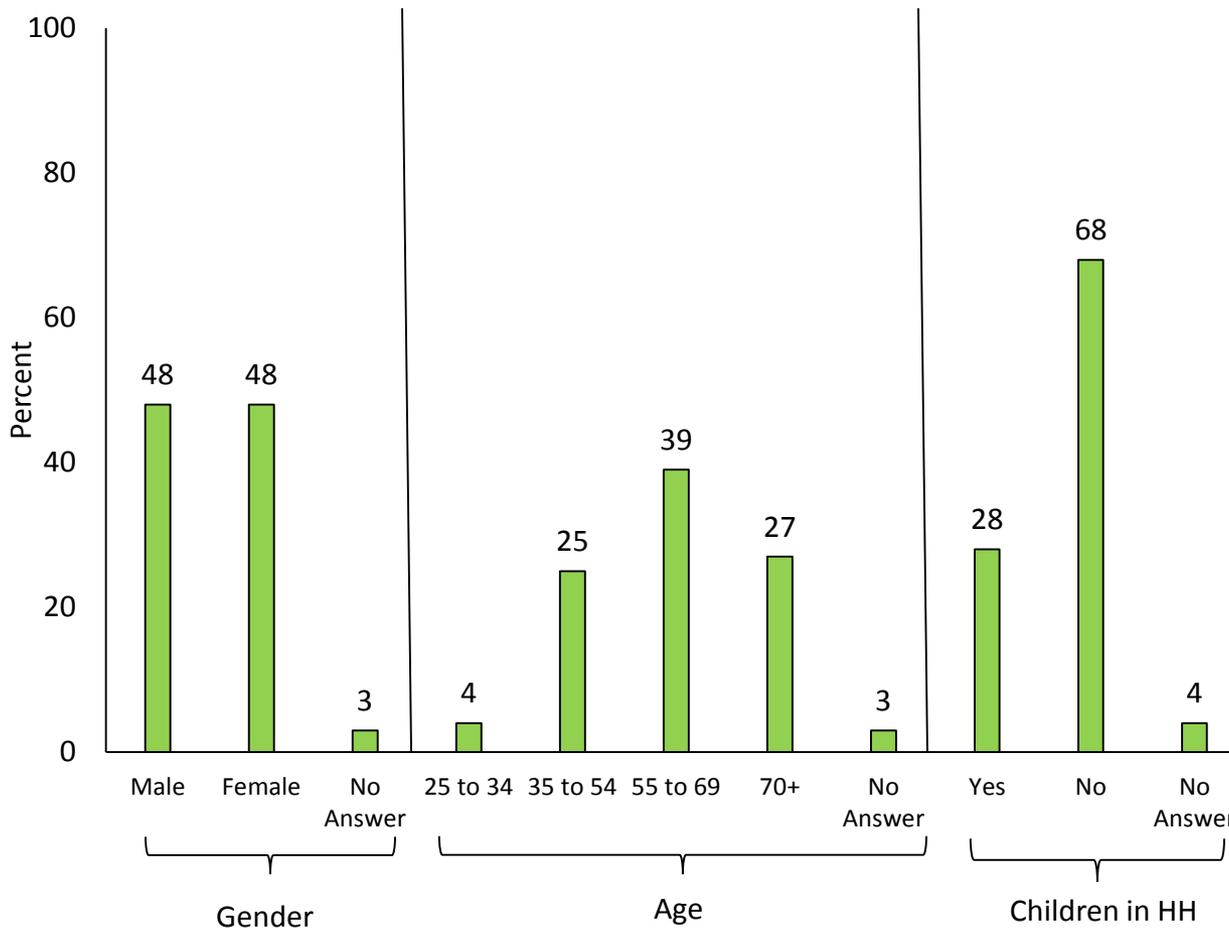


Similar to prior iterations of the study, the sample contains comparatively few renters and is predominantly made up of homeowners.

By comparison, the make-up of past samples contained 3-4% renters, with the remainder being property owners.

Gender, Age, and Household Composition

Sourced from Questions 19, 21, and 22.

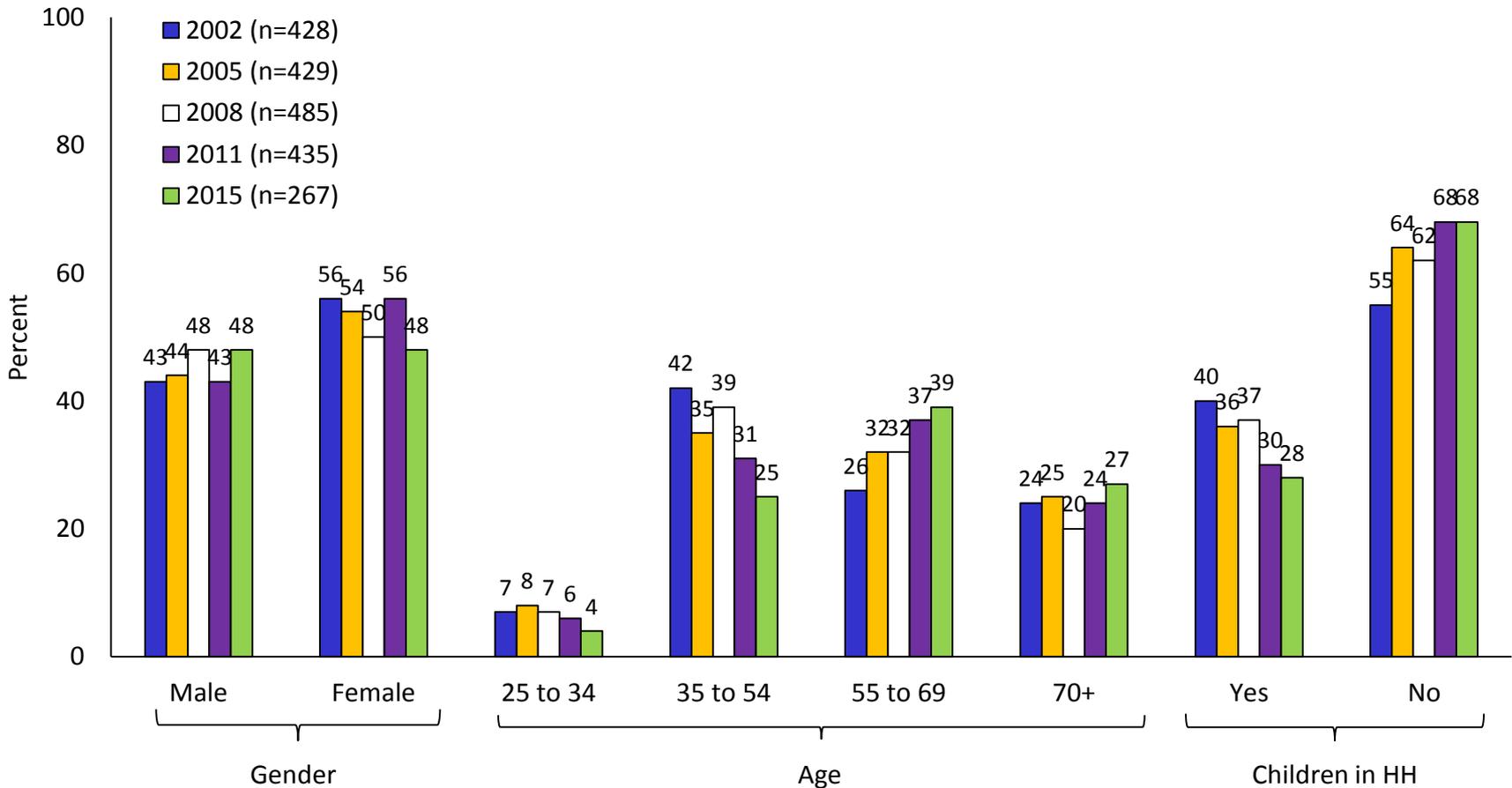


Consistent with past rounds of measurement, the study sample reflects a mix of men and women and is largely made up of residents age 55 or older.

Indeed, relative to past measurement, the current proportion of 55+ adults in the sample (66%) is the largest since PWD began collecting demographic information. Please see trending data on the following page.

Roughly three-in-ten respondents (28%) report having children in the home, consistent with the most recent measurement and a continuation of a declining trend in the reported presence of children in respondents' homes.

Trends in Gender, Age, and Household Composition

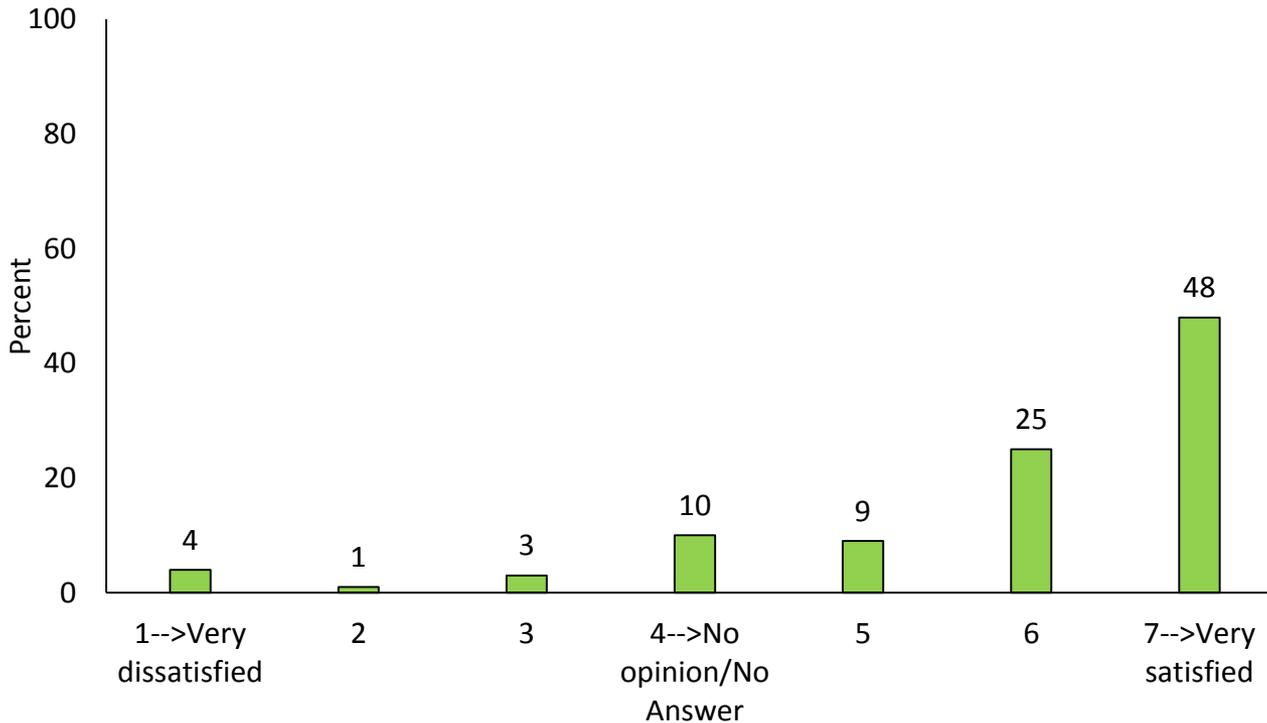


Dimensions of Customer Satisfaction

Core Measures of
Satisfaction with PWD

Overall Satisfaction with Portland Water District

Question 1: Overall, how satisfied are you with the Portland Water District?



Presently, the vast majority (82%) of responding customers are satisfied with the Water District, including nearly half (48%) who rate their level of satisfaction as “Very satisfied.”

The strongest levels of satisfaction are seen for older customers age 70+ (59% are “Very satisfied”), as well as customers outside of Portland (52%) and customers who internal data indicates are water-only customers (62%).

Reasons for Dissatisfaction with Portland Water District

Question 1 (follow-up):

If you are not satisfied and gave a response of 3 or less, why is that?

What can be done to change this?

Can the sewerage drain someplace other than Casco Bay?

I have had no problems since I moved to Windham and the water district has helped with my bill when I was really broke - they helped with a discount.

My water bill is high for one person - plus I only wash clothes once a week.

No visibility in community.

Not happy with rate hikes. Originally sewerage building was supposed to be paid off and rates lowered; not happy w/rain water fees dues to be imposed.

Please stop putting fluoride in the water!

Stop sending paper ads for a monopoly and save the \$\$\$. It costs to send and print them!!!!

The inability to handle storm water runoff caused us to get 9" of water in our basement in Aug 2014.

The toxic fluoride in our water makes it unsafe to drink.

Too expensive.

Too expensive. We are two retired people and use very little water, yet our bills are \$60-70!! We have all new high efficiency fixtures.

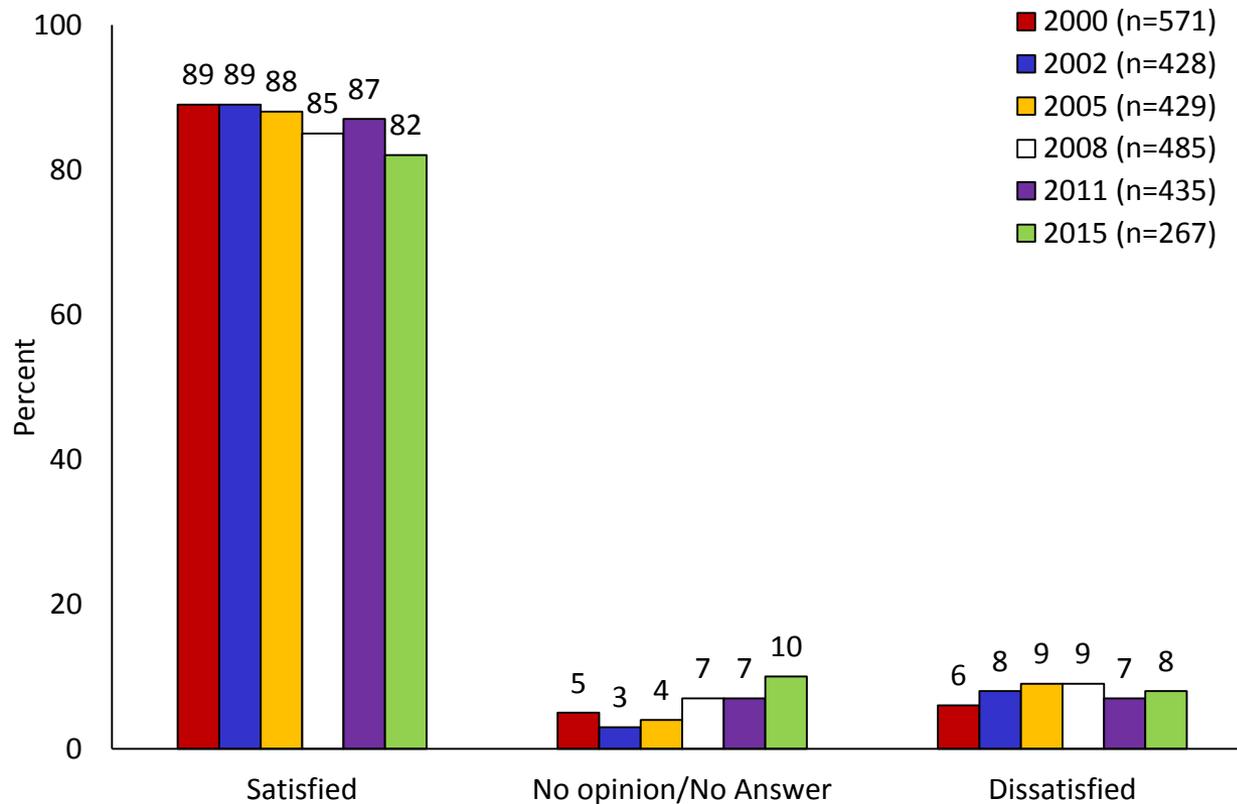
Would love to see less chlorine, pharmaceuticals filtered out, and fluoride removed. Because of all these I do not use it for drinking water.

Feedback from dissatisfied customers was limited, with the most common themes being cost-related criticisms and also concerns about fluoride being added to water.

The actual comments appear at left.

Trends in Overall Satisfaction

*Overall, how satisfied are you with the Portland Water District? **



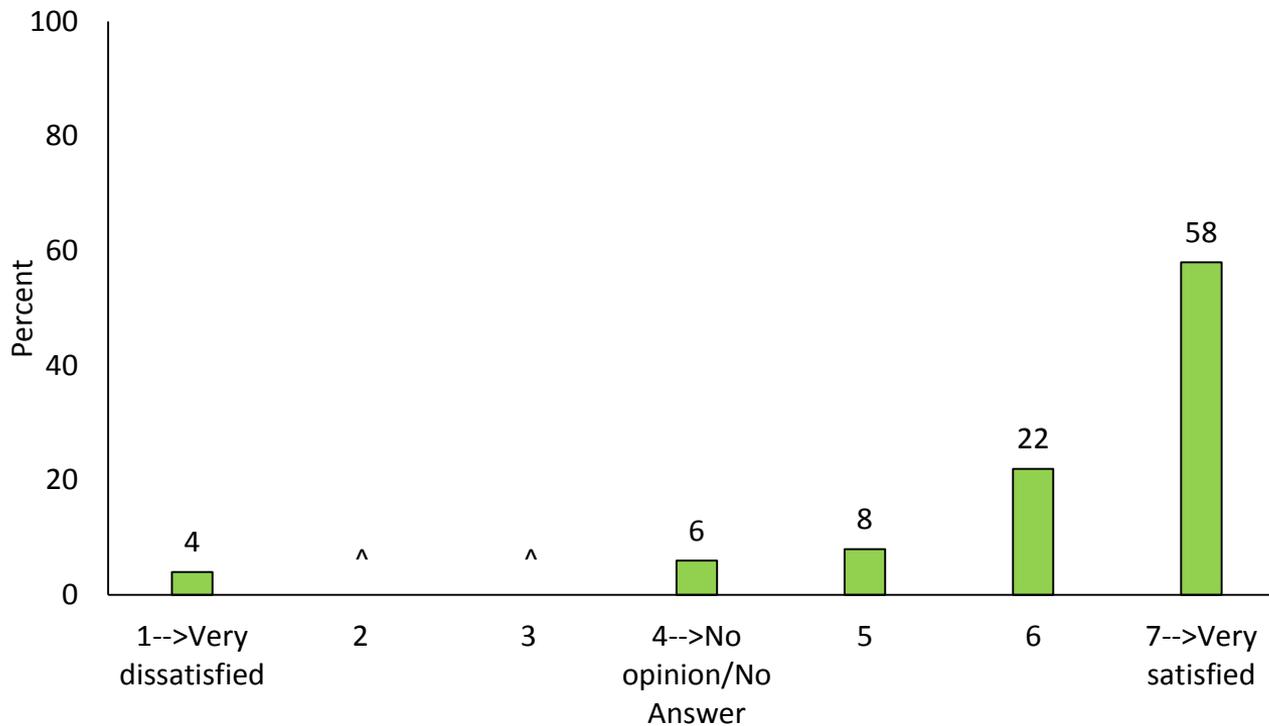
Current results for 2015 are generally consistent with past rounds of measurement, all of which have shown satisfaction levels in excess of 8-in-10 customers.

* From 2000-2005, the question was worded as: "Overall, how satisfied are you with the service provided by the PWD?"

Satisfaction with Water Service

Question 2A: How satisfied are you with each of the following aspects of service from the Portland Water District?

Your water service



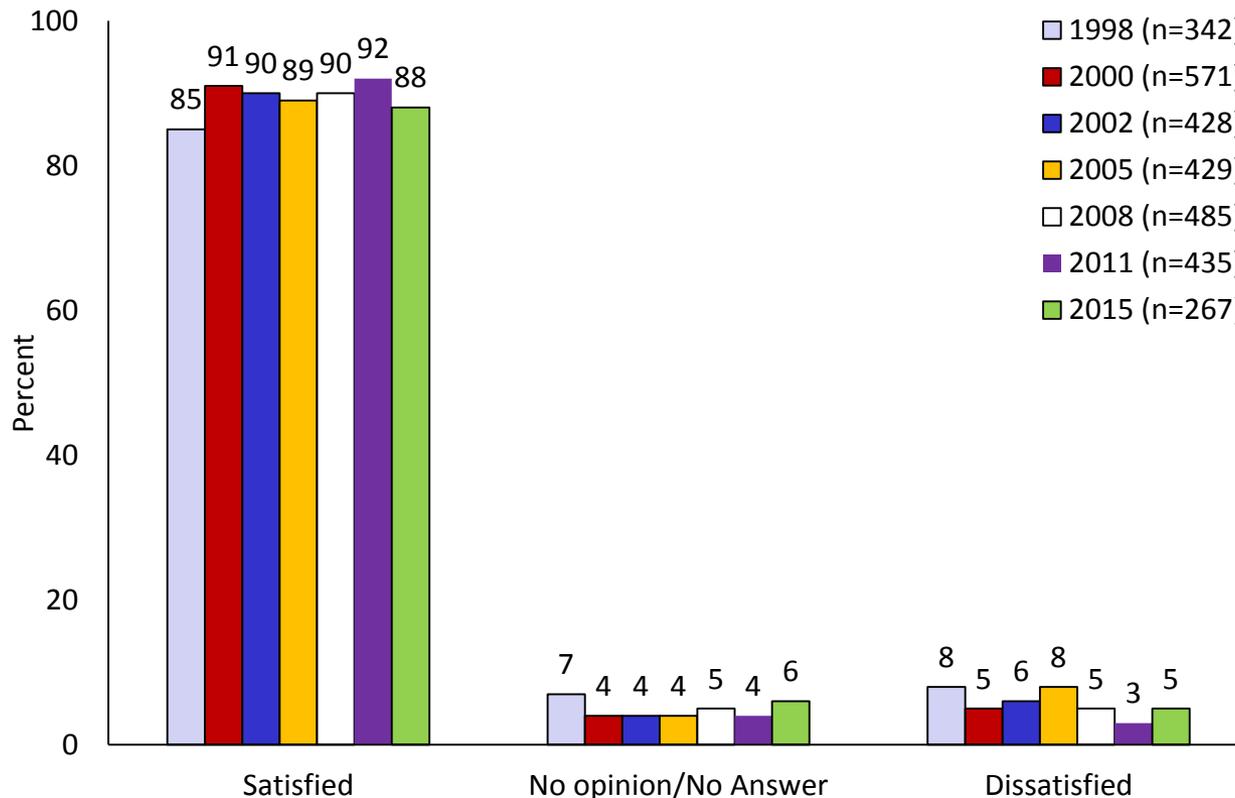
Presently, the vast majority (88%) of customers are satisfied with their water service specifically, including nearly 6-in-10 (58%) who rate the level of satisfaction with their water service as “Very satisfied.”

The strongest levels of satisfaction are seen for older customers (age 70+), where 67% are “Very satisfied” and, again, customers who internal data indicates are water-only customers (68%).

^ Denotes proportion of less than 1%.

Trends in Satisfaction with Water Service

How satisfied are you with each of the following aspects of service from the Portland Water District?
Your water service

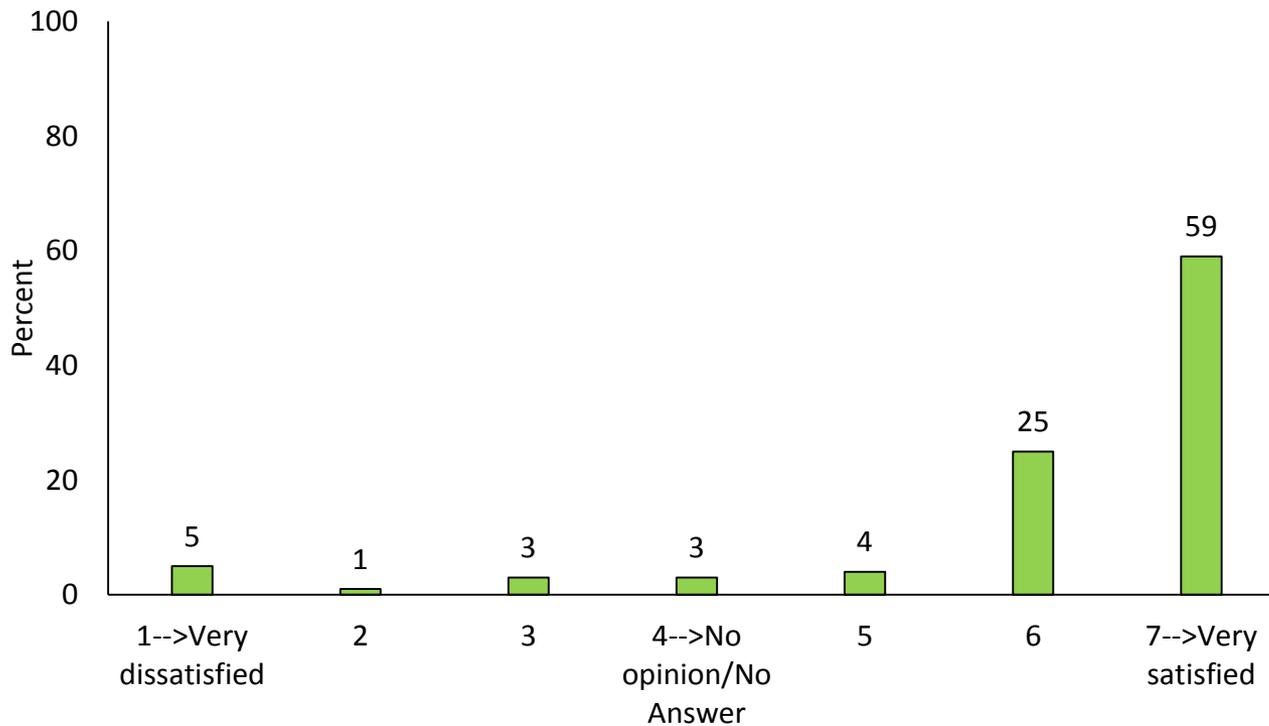


Results for 2015 are consistent with past rounds of measurement, all of which have shown satisfaction levels with water service specifically registering at or above 9-in-10 customers for more than a decade.

Satisfaction with Water Quality

Question 2B: How satisfied are you with each of the following aspects of service from the Portland Water District?

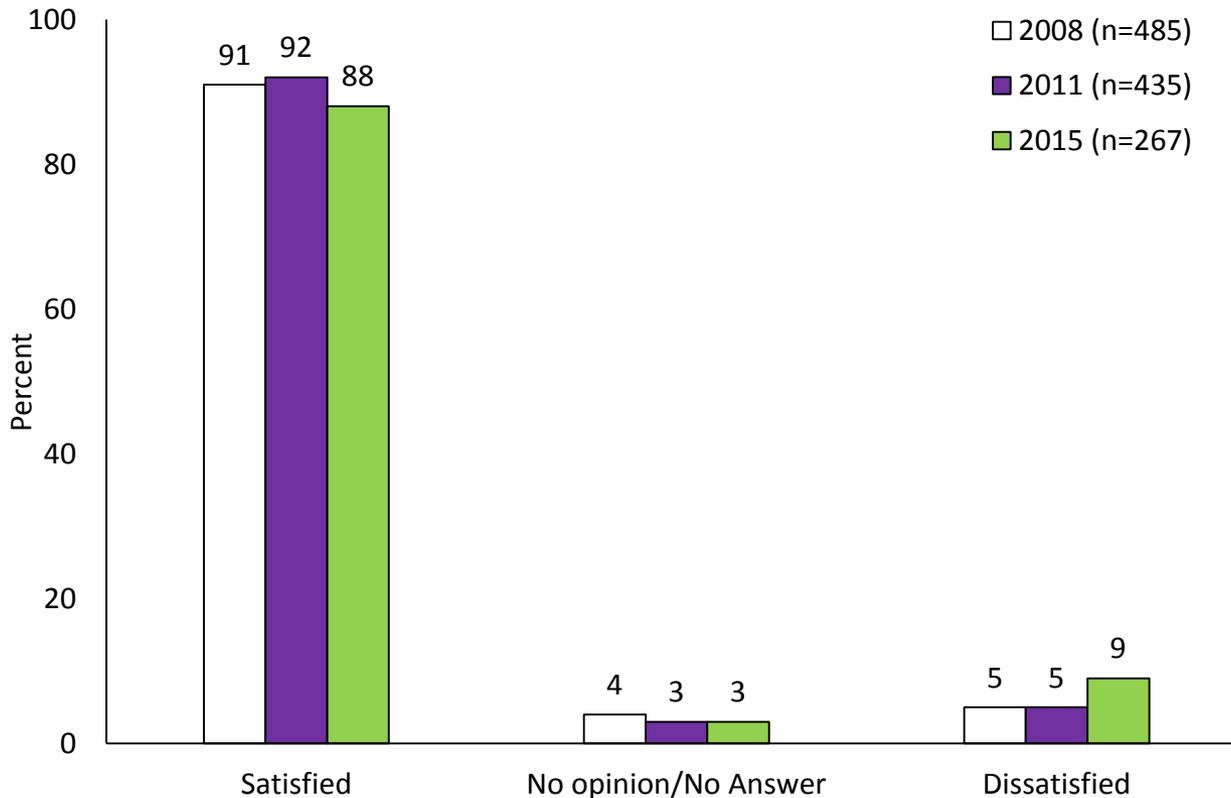
The quality of your water



Currently, the vast majority (88%) of customers are satisfied with the quality of their water, including fully 59% who rate the level of satisfaction with their water quality as "Very satisfied."

Trends in Satisfaction with Water Quality

How satisfied are you with each of the following aspects of service from the Portland Water District?
The quality of your water

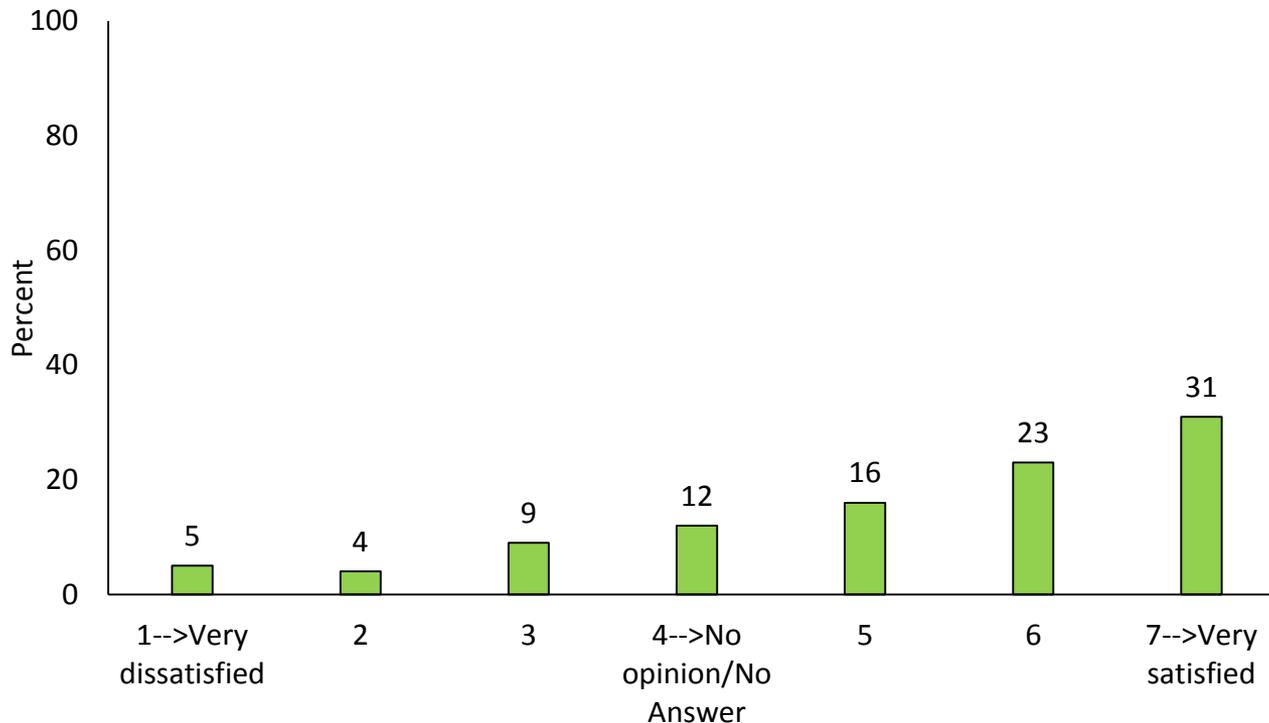


In the three measurements that have specifically assessed customers' perceptions of water quality, satisfaction levels for water quality specifically has generally been approximately 9-in-10 residents.

Satisfaction with Price of Water

Question 2C: How satisfied are you with each of the following aspects of service from the Portland Water District?

The price you pay for water



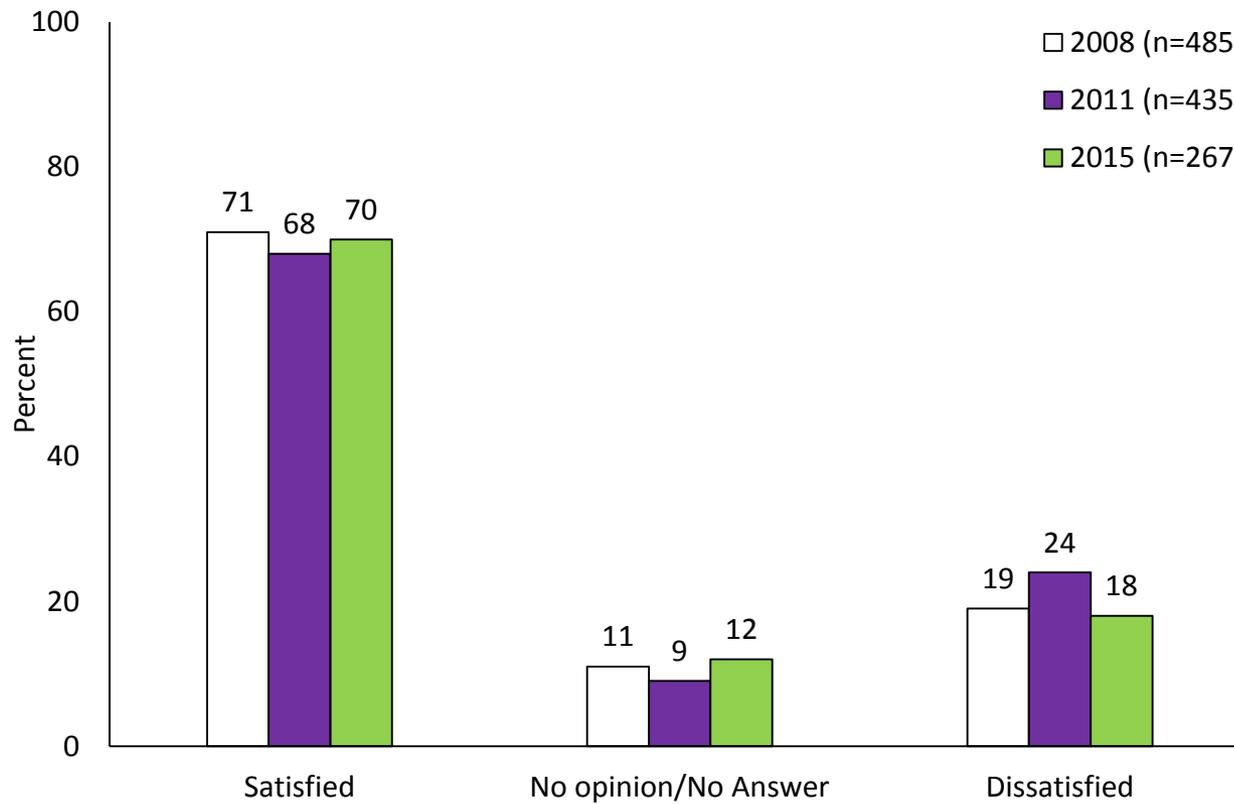
Relative to other areas of satisfaction measurement, customers are satisfied with the price of their water service, but not effusively so.

Indeed, while 7-on-10 customers (70%) claim to be satisfied with the price paid for water, only 31% note they are “very satisfied.”

Along with older residents age 70+ (41% are “Very satisfied”), the strongest levels of satisfaction with price are again seen for customers outside of Portland (37%) and customers who internal data indicates are water-only customers (42%).

Trends in Satisfaction with Price of Water

How satisfied are you with each of the following aspects of service from the Portland Water District?
The price you pay for water

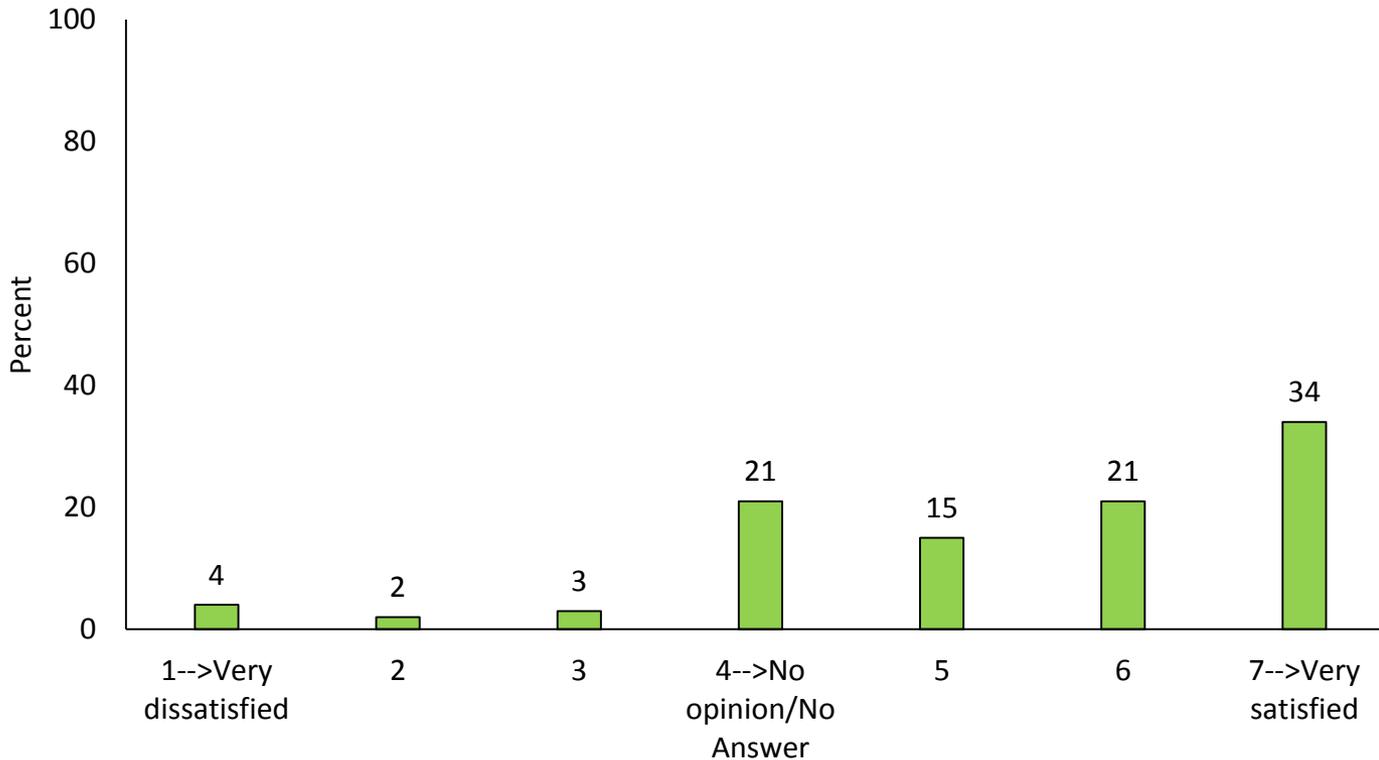


In the three measurements that have specifically assessed customers' views on the price they pay for water service from PWD, satisfaction levels for price specifically have been consistent at around 70%.

While 70% represents a two percentage point increase in satisfaction over 2011 results, this difference is directional only; similarly, the decline in the proportion of dissatisfied customers also falls within the sampling error for the studies.

Satisfaction with Sewer Service

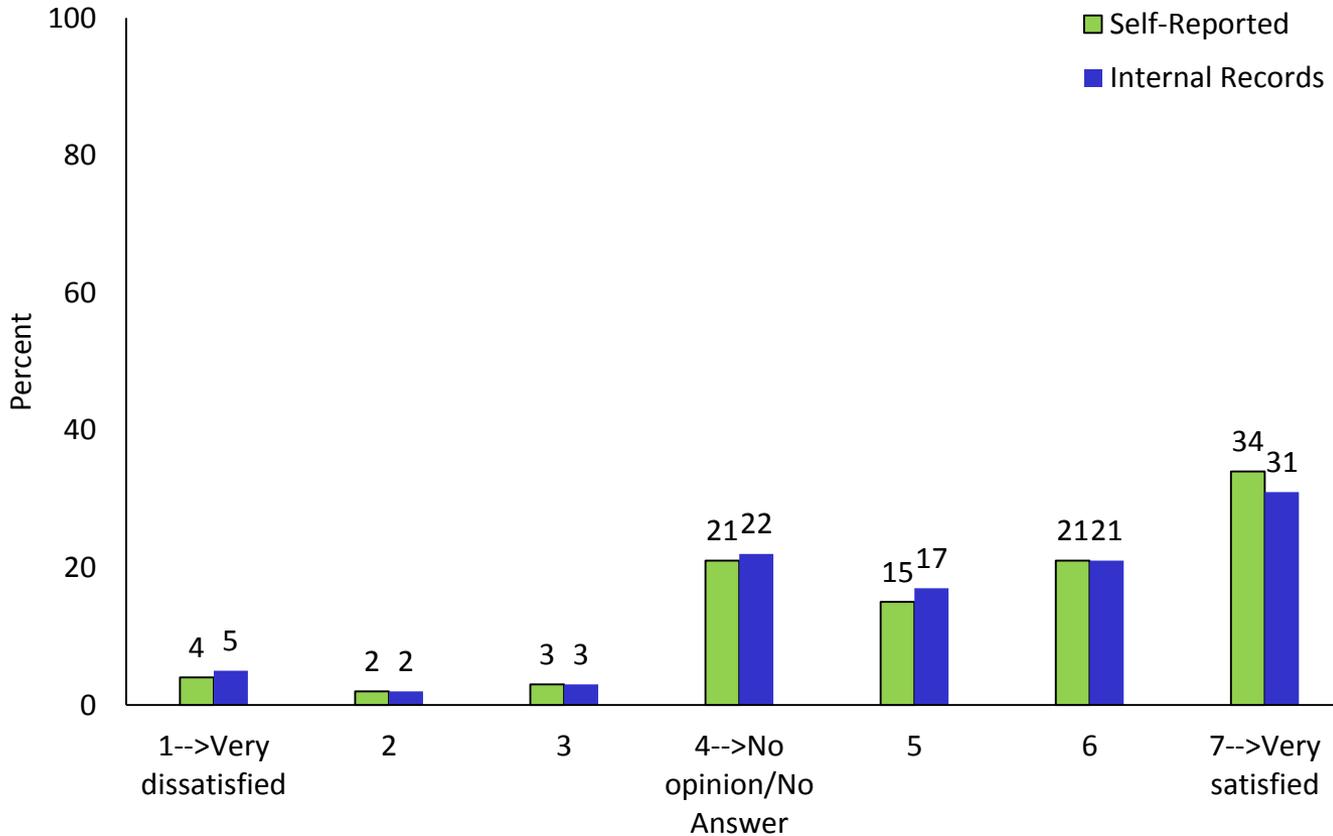
Question 4A: How satisfied are you with each of the following? *
Your sewer service



When those who believe PWD is involved with their sewer service (with those who feel this “Does not apply” removed from the analysis) were asked to assess their level of satisfaction, 7-in-10 (70%) are satisfied, including 34% who report being “very satisfied.”

* Self-reported “Does not apply” not included.

Satisfaction with Sewer Service: PWD Sewer: Self-Reported vs. Internal Records



When results of those who believe they receive sewer service from PWD were compared to results from customers that internal billing records indicate the Water District is involved in their sewer service (there is some overlap), results were markedly similar, despite some confusion among customers concerning the involvement of PWD in customers' sewer services.

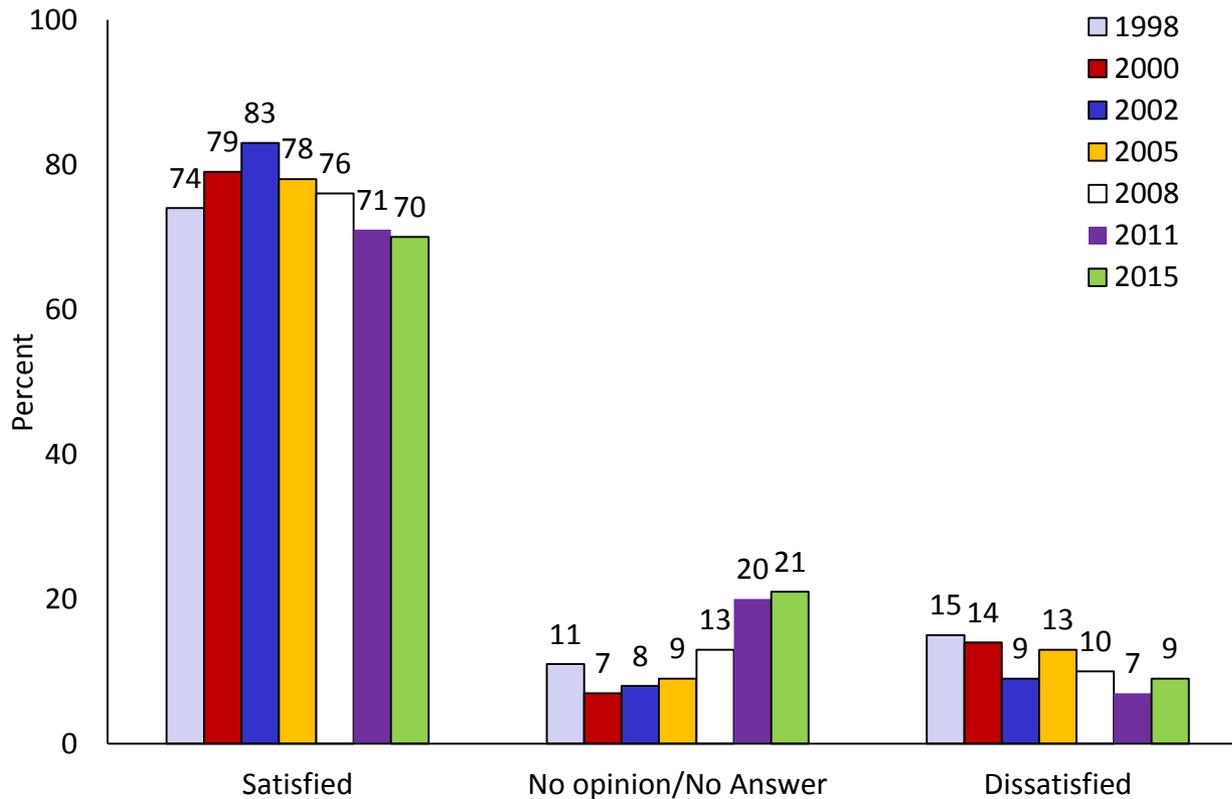
* Self-reported "Does not apply" not included.

Satisfaction with Sewer Service: By Community

Level of Satisfaction (Question 4A)	Cape Eliz. n=23	Cumb. n=14	Falm. n=11	Gorh. n=20	Port. n=83	Scar. n=32	So. Po. n=39	West. n=26	Wind. N=12	Stand. n=4	Other n=2
Dissatisfied	8%	7%	9%	10%	10%	12%	--	8%	--	--	--
No Opinion	9%	29%	27%	20%	18%	9%	13%	--	--	--	--
Satisfied	39%	35%	36%	40%	63%	56%	80%	53%	8%	50%	--
No Answer/ Does Not Apply	43%	29%	27%	20%	10%	22%	8%	39%	92%	50%	100%

Trends in Satisfaction with Sewer Service

*How satisfied are you with each of the following? **
Your sewer service



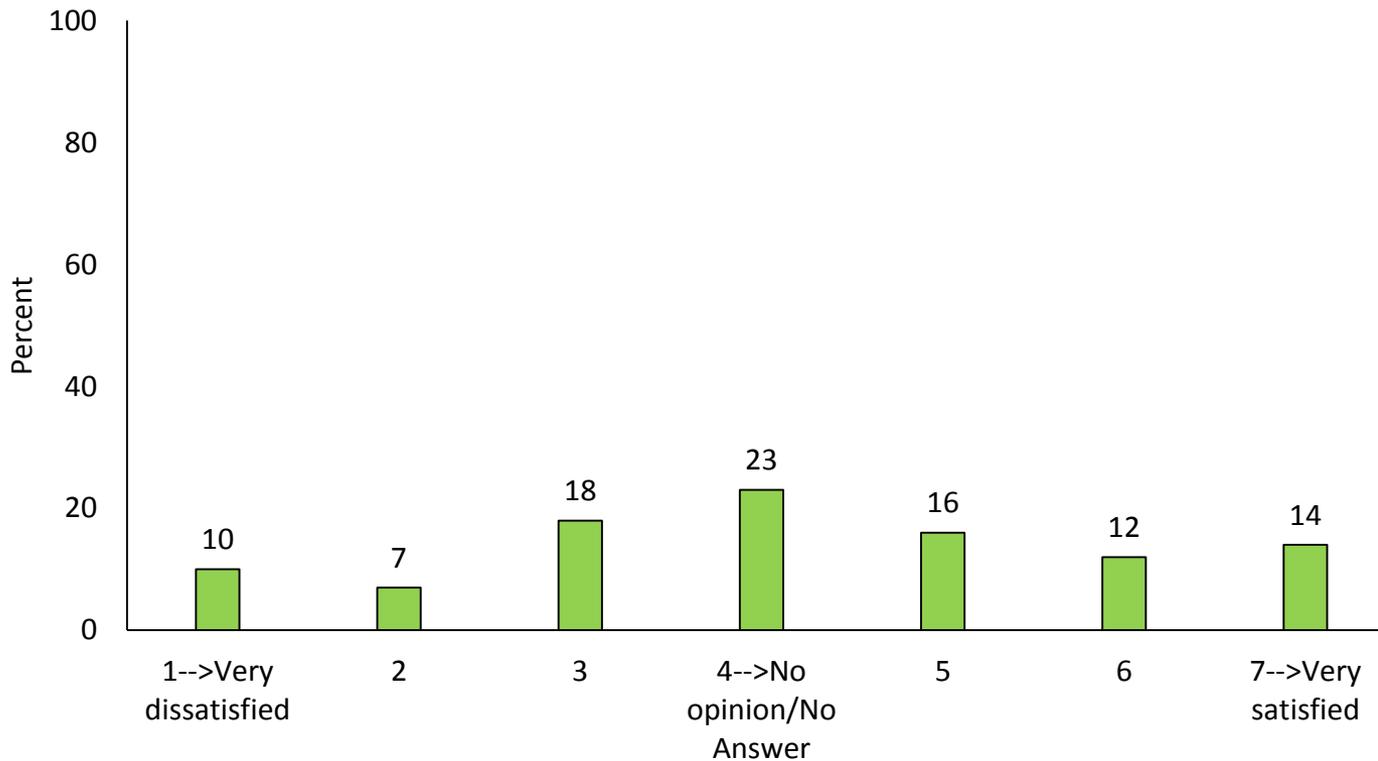
Current results for 2015 are consistent with recent rounds of measurement, which have shown satisfaction levels at around 7-in-10 customers.

Interestingly, while dissatisfaction levels are trending favorably relative to very early measurements, the proportion of customers giving a “No opinion” response or declining to answer has been around 1-in-5 customers in the last two studies.

* Self-reported “Does not apply” not included.

Satisfaction with Price of Sewer Service

Question 4B: How satisfied are you with each of the following? *
Price you pay for sewer

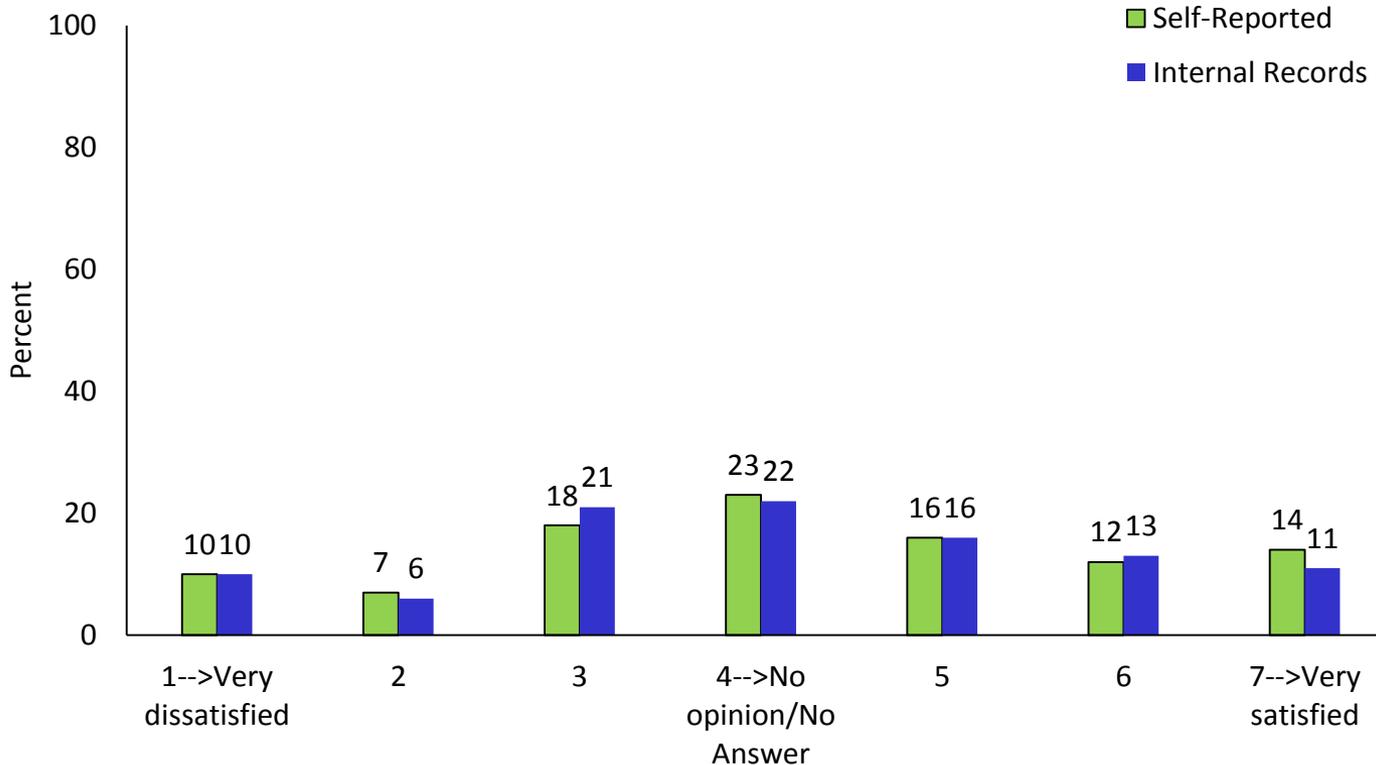


Similarly, when those who believe PWD is involved with their sewer service (with those who feel this “Does not apply” removed from the analysis) were asked to assess their level of satisfaction, fewer than half (42%) are satisfied, with just 14% claiming to be “very satisfied.”

A similar proportion (35%) are dissatisfied with the cost of sewer service.

* Self-reported “Does not apply” not included.

Satisfaction with Price of Sewer Service: PWD Sewer: Self-Reported vs. Internal Records



Again, when results from those who believe PWD is involved with their sewer service were compared to results from customers that internal billing records indicate that PWD is involved, results were again remarkably, despite some confusion concerning PWD's involvement in this aspect of Water District service.

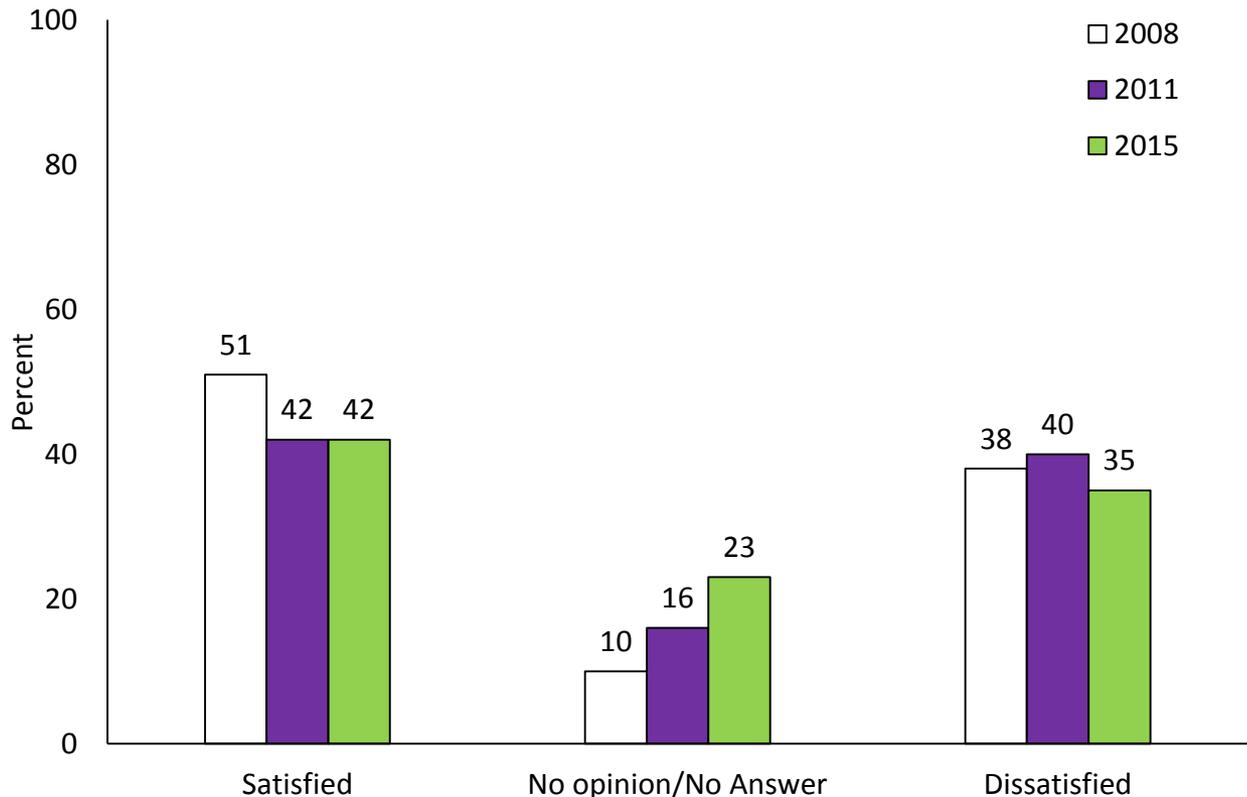
* Self-reported "Does not apply" not included.

Satisfaction with Price of Sewer Service: By Community

Level of Satisfaction (Question 4B)	Cape Eliz. n=23	Cumb. n=14	Falm. n=11	Gorh. n=20	Port. n=83	Scar. n=32	So. Po. n=39	West. n=26	Wind. N=12	Stand. n=4	Other n=2
Dissatisfied	30%	21%	9%	25%	40%	12%	27%	27%	--	--	--
No opinion	9%	29%	18%	15%	18%	9%	8%	4%	--	--	--
Satisfied	22%	21%	27%	35%	31%	56%	62%	27%	8%	25%	--
No Answer/ Does Not Apply	39%	29%	45%	25%	11%	22%	5%	42%	92%	75%	100%

Trends in Satisfaction with Price of Sewer Service

*How satisfied are you with each of the following? **
Price you pay for sewer



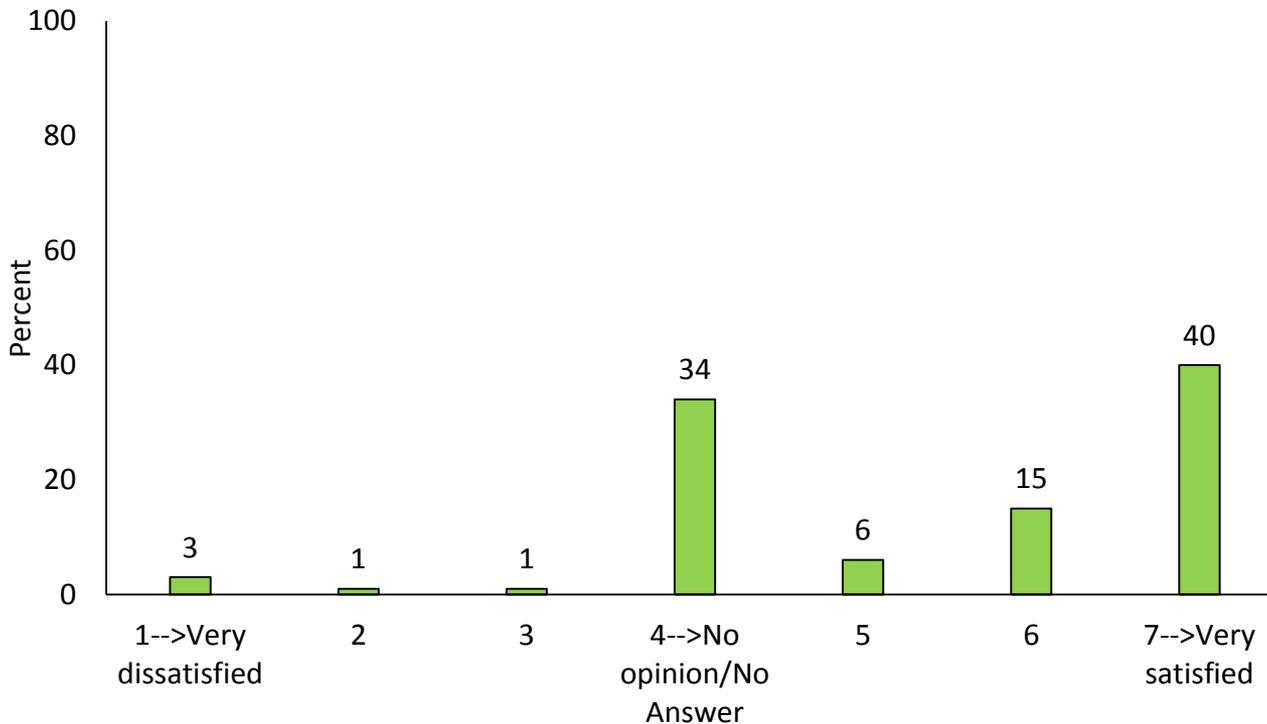
Customers' level of satisfaction with the cost of their sewer service is consistent with 2011 results, with a sizable bloc noting dissatisfaction in each round of measurement and an increasing proportion claiming to not have an opinion or declining to respond.

* Self-reported "Does not apply" not included.

Satisfaction with Quality of Customer Service

Question 2D: How satisfied are you with each of the following aspects of service from the Portland Water District?

The quality of customer service

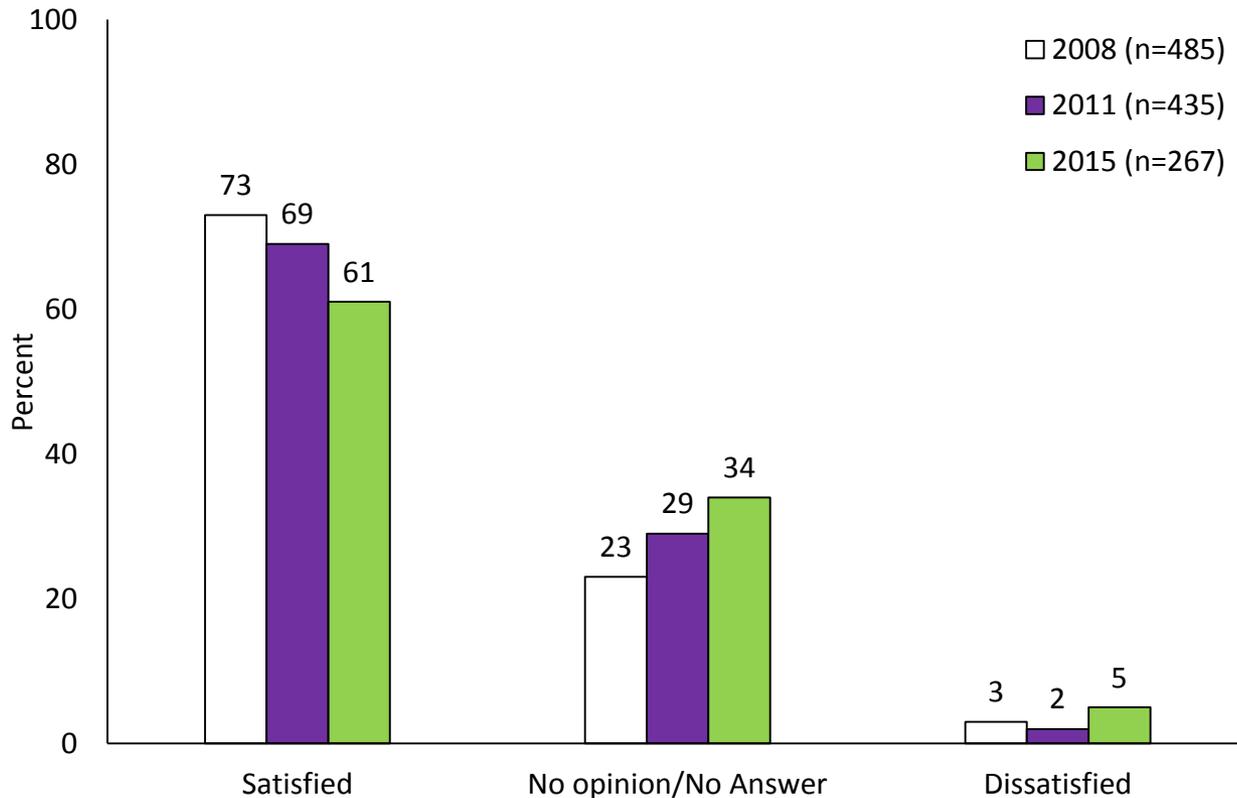


Currently, the vast majority of customers who rendered an opinion are satisfied with PWD's customer service.

Fully one-third (34%) of responding customers claimed to not have an opinion on customer service or declined to offer an assessment.

Trends in Satisfaction with Quality of Customer Service

*How satisfied are you with each of the following aspects of service from the Portland Water District?
The quality of customer service*



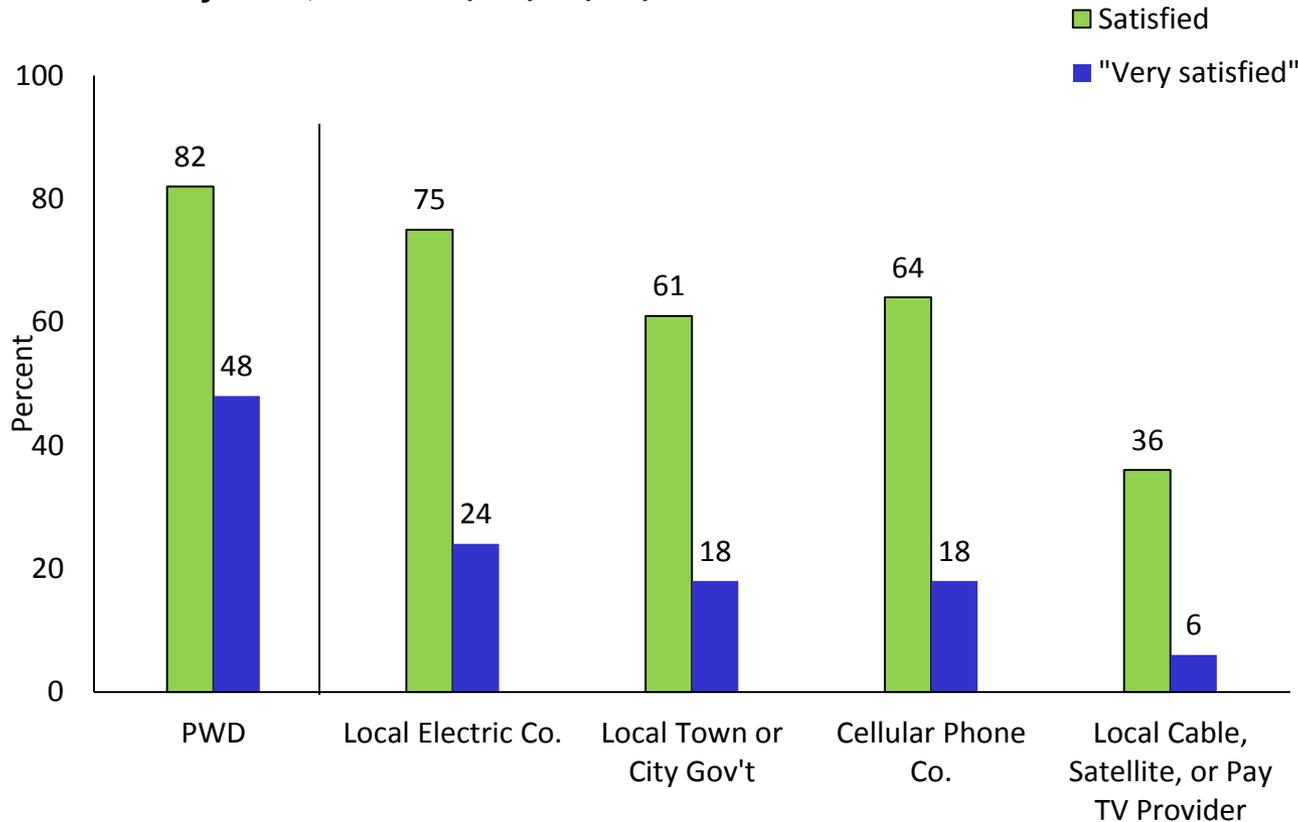
Interestingly, over the three measurements that have specifically assessed perceptions of customer service quality, the proportion who had “No opinion” or declined to answer is trending upward in what could suggest an overall decrease in customers interacting with PWD regarding customer service-related matters.

While the resulting satisfaction figure is trending downward, as a proportion of customers who actually offered an opinion, more than 9-in-10 customers remain satisfied.

Comparative Satisfaction with
Other Service Providers

Comparative Levels of Satisfaction: PWD vs. Other Service Providers

Sourced from Questions 1, 5A, 5B, 5C, and 5D.



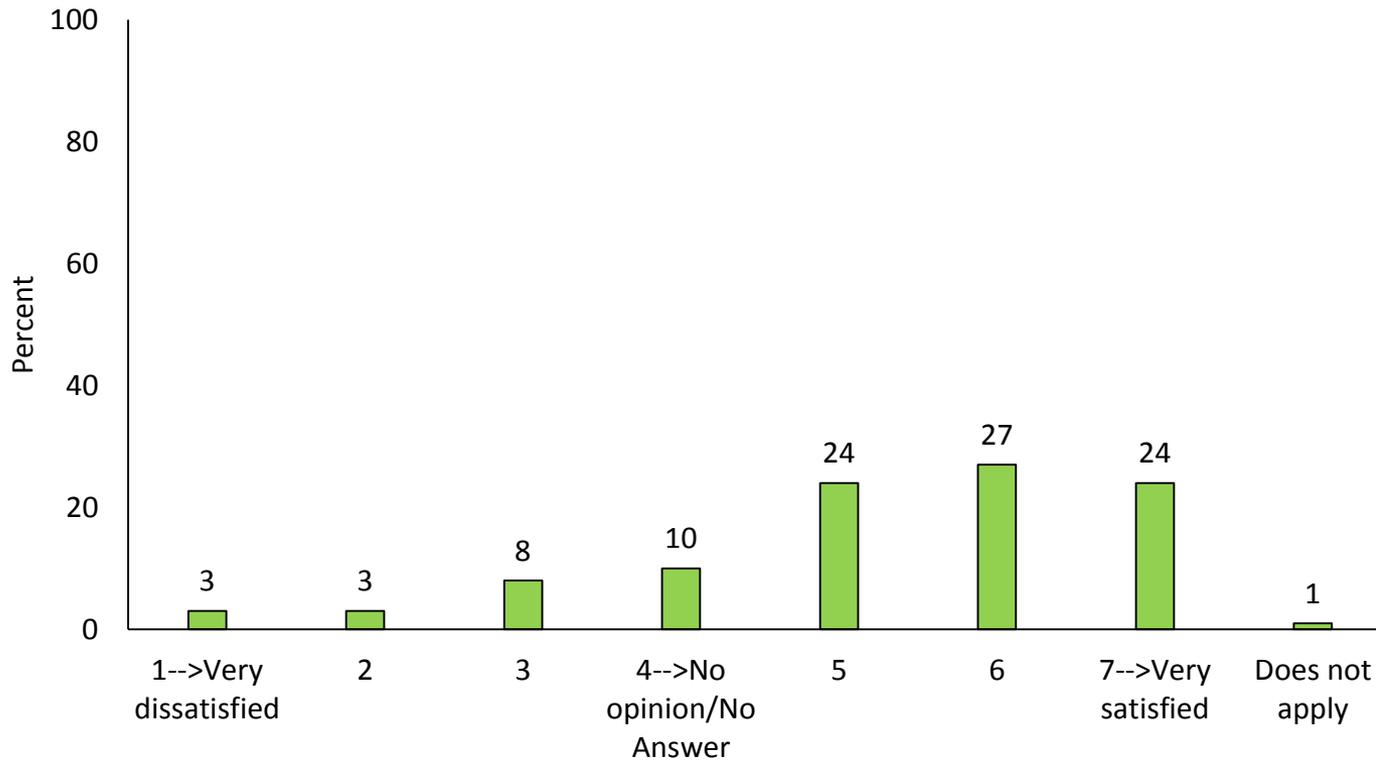
In current 2015 results, stated satisfaction levels for the Water District exceed all other tested comparative service providers.

What is particularly striking is the proportion of PWD customers who are "Very satisfied" (48%), a figure double that of the nearest tested provider (the local electric utility, at 24%).

Details on satisfaction measurement for tested service providers appear on the following pages.

Satisfaction with Local Electric Company

Question 5C: How satisfied are you with each of the following companies?
Local electric company

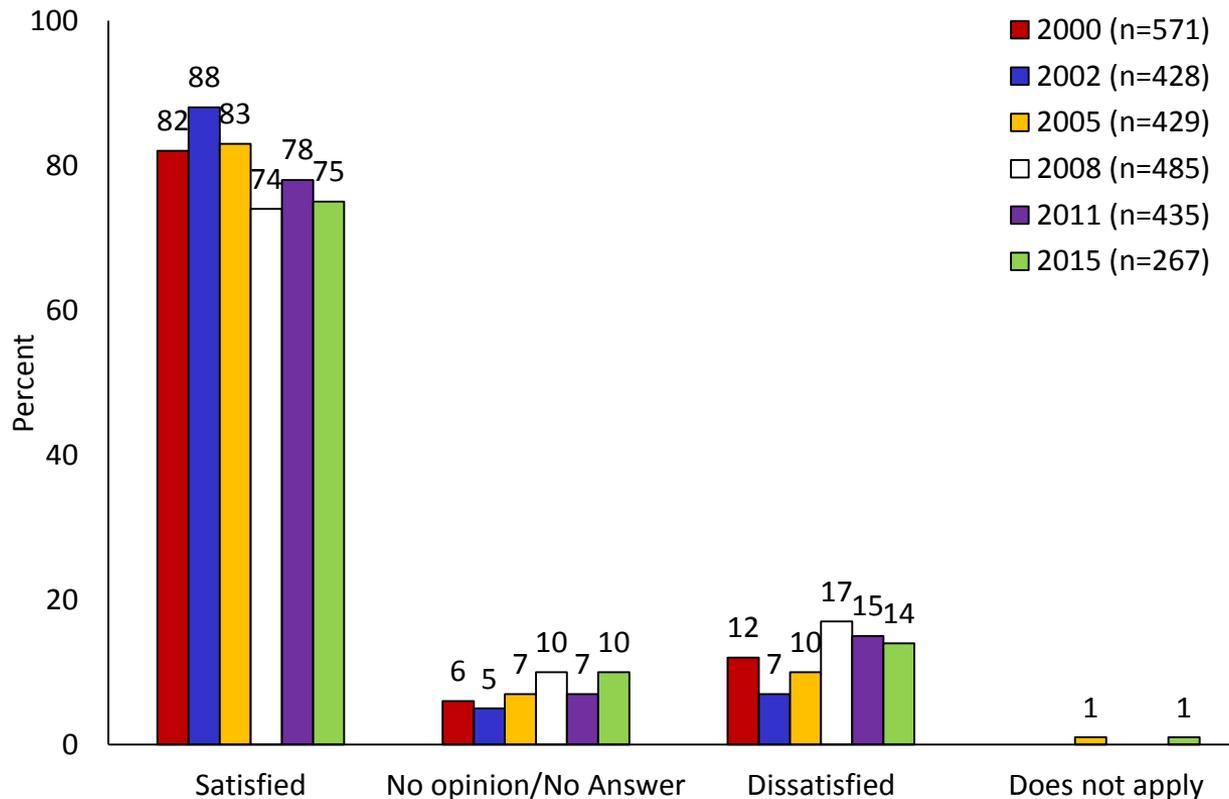


The local electric utility was included on the survey as a means of service delivery comparison with the performance of another public service provider.

Three-quarters (75%) of respondents are satisfied, including one-quarter (24%) who are “Very satisfied.”

Trends in Satisfaction with Local Electric Company

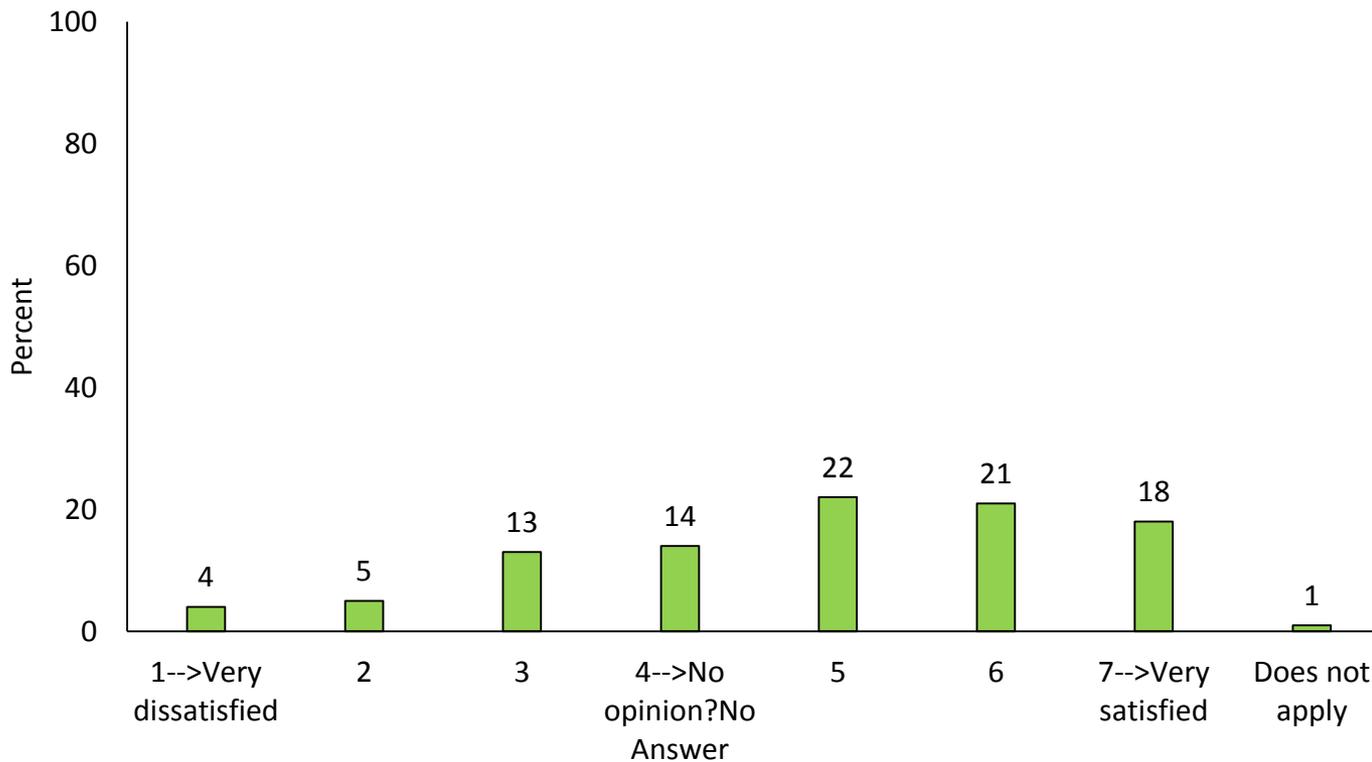
How satisfied are you with each of the following companies? Local electric company



Comparative satisfaction levels for the local electric utility have been between 74% and 88% since 2000 and have settled-in since 2008 at between 70% and 80% satisfaction, slightly below where PWD is presently at greater than 8-in-10 residents claiming to be satisfied.

Satisfaction with Local Town or City Government

Question 5D: How satisfied are you with each of the following companies?
Local Town or City Government

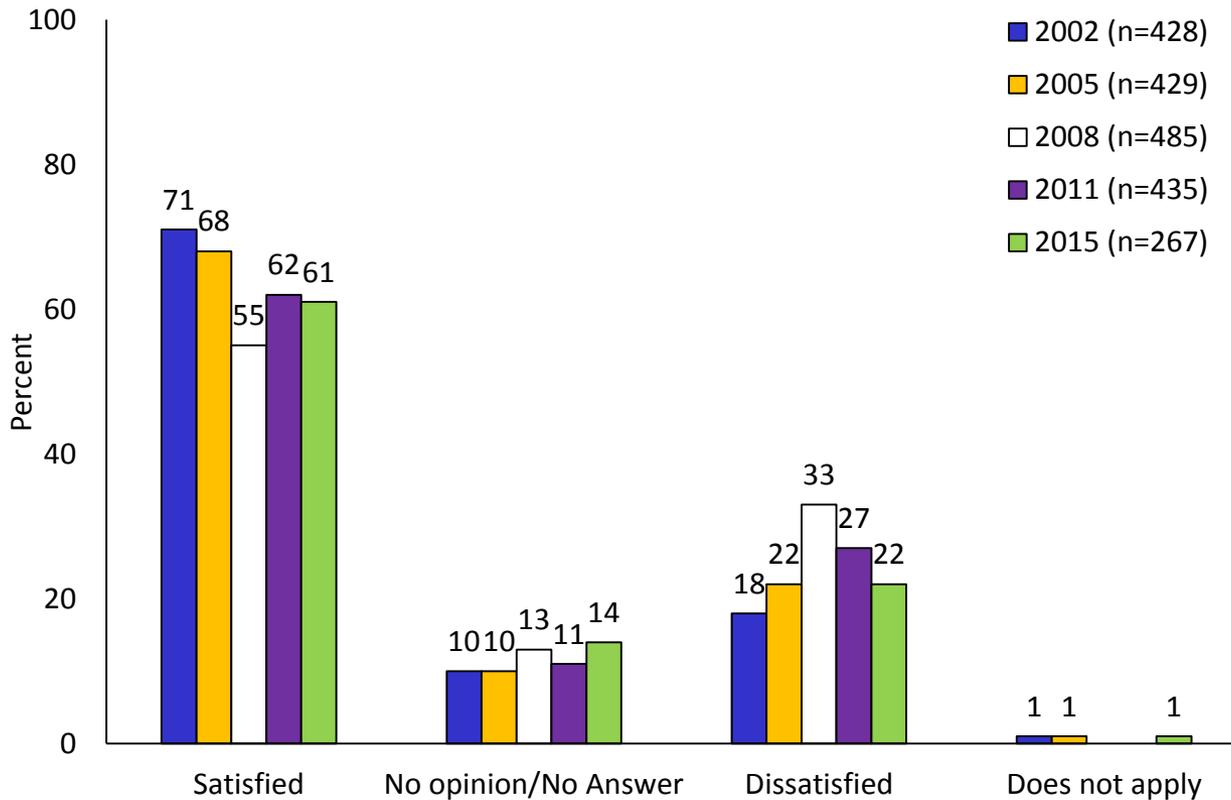


Given PWD's status as a public organization, respondents' local municipal government was included on the survey as another means of service delivery performance comparison.

While more than 6-in-10 (61%) of respondents are satisfied, only 18% are "Very satisfied" with the performance of their local government.

Trends in Satisfaction with Local Town or City Government

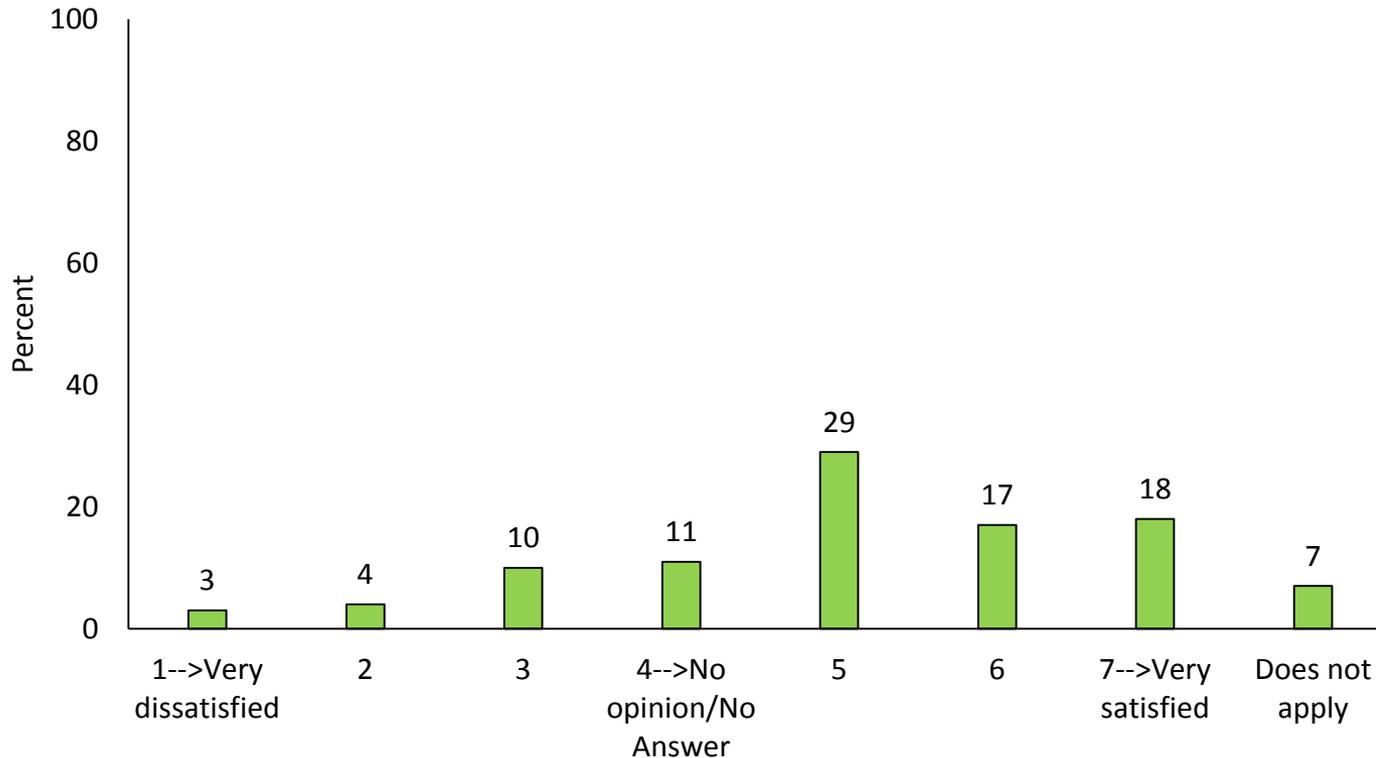
How satisfied are you with each of the following companies? Local Town or City Government



Satisfaction levels for local municipal governments have been between a low of 55% and a high of 71% since 2002 and have settled—in recently at roughly 6-in-10 residents claiming to be satisfied, importantly, well below where PWD is presently (82%).

Satisfaction with Cellular Phone Company

Question 5A: How satisfied are you with each of the following companies?
Cellular Phone Company *



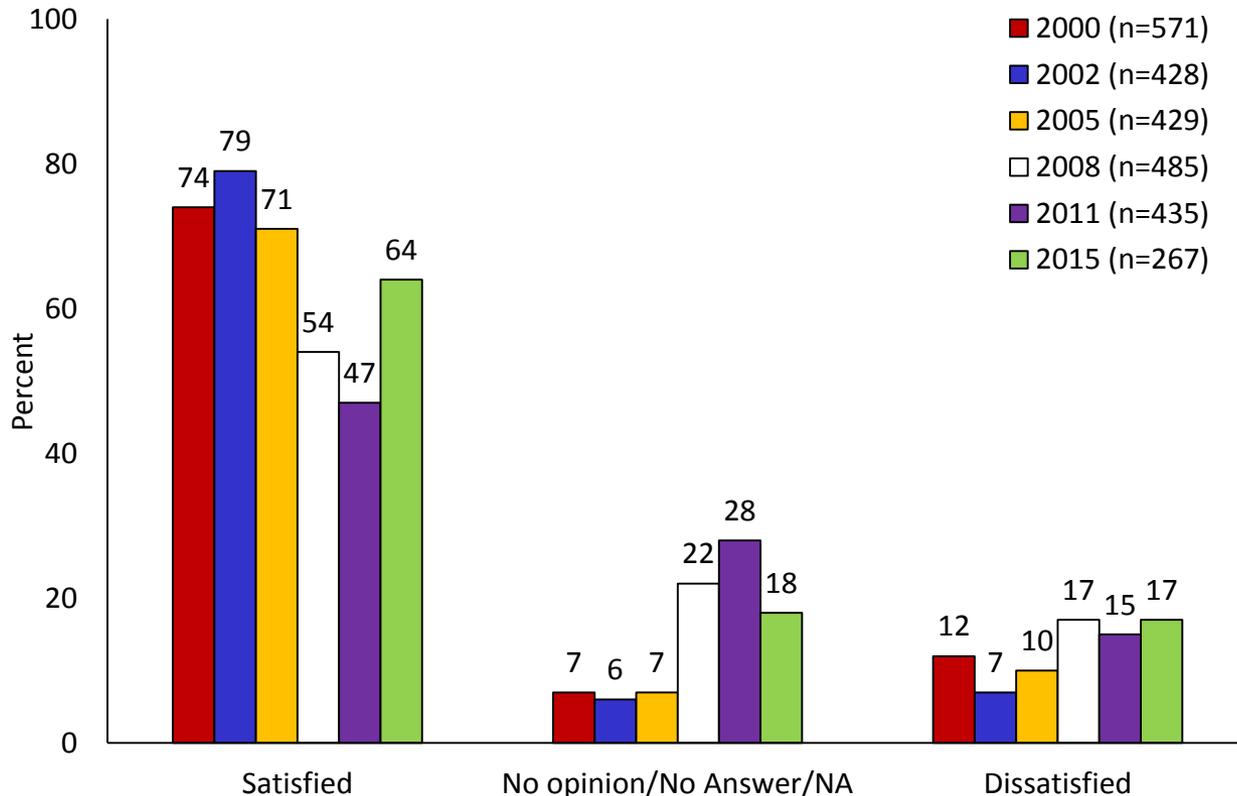
In a question modified to address cell phone usage and not exclusively local landline service and keep with changing consumer behavior, the satisfaction level for service provided by cellular phone companies is at 64%, but only 18% of residents are “Very satisfied.” These results are similar to the perceived performance of municipal government.

By comparison, PWD’s satisfaction level stands at 82%, with 48% “Very satisfied.”

* In past measurements, the item referred to “local phone company,” but was modified in 2015 given the rise in cellular phone usage and the decline in landline penetration.

Trends in Satisfaction with Phone Company

How satisfied are you with each of the following companies? Cellular Phone Company *



In examining trend data for phone providers, all results prior to 2015 refer to “local telephone company.”

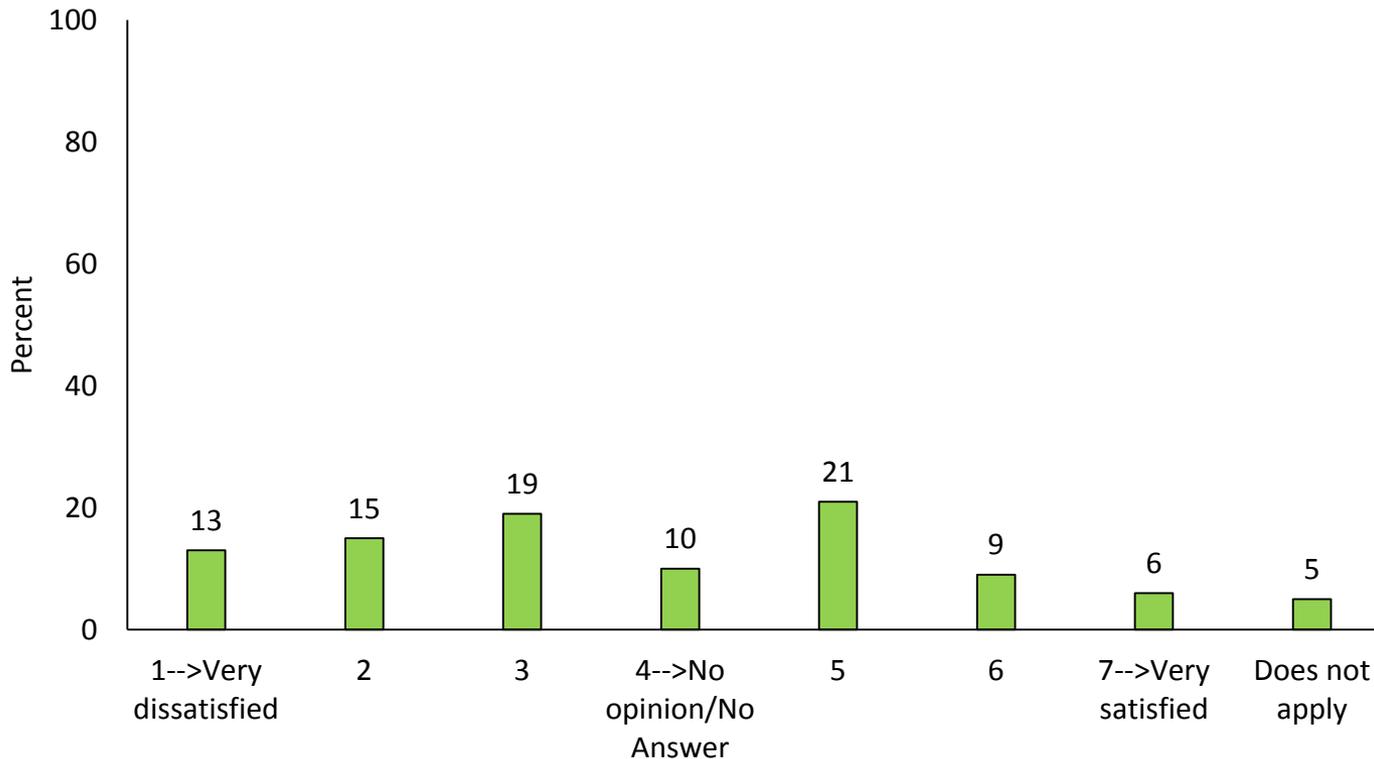
This is notable, particularly with declines in the proportion claiming to be satisfied in 2008 and 2011, given some operational challenges at Fairpoint Communications at these times.

By comparison, current levels of satisfaction with cell providers (64%) is more consistent with 2005 and earlier satisfaction levels for the local phone company.

* In past measurements, the item referred to “local phone company,” but was modified in 2015 given the rise in cellular phone usage and the decline in landline penetration.

Satisfaction with Local Cable, Satellite, or Pay TV Provider

Question 5B: How satisfied are you with each of the following companies?
Local Cable, Satellite or Pay TV Provider *



To account for shifting behaviors with regard to pay TV, the existing question regarding cable TV was expanded to include satellite and other pay options.

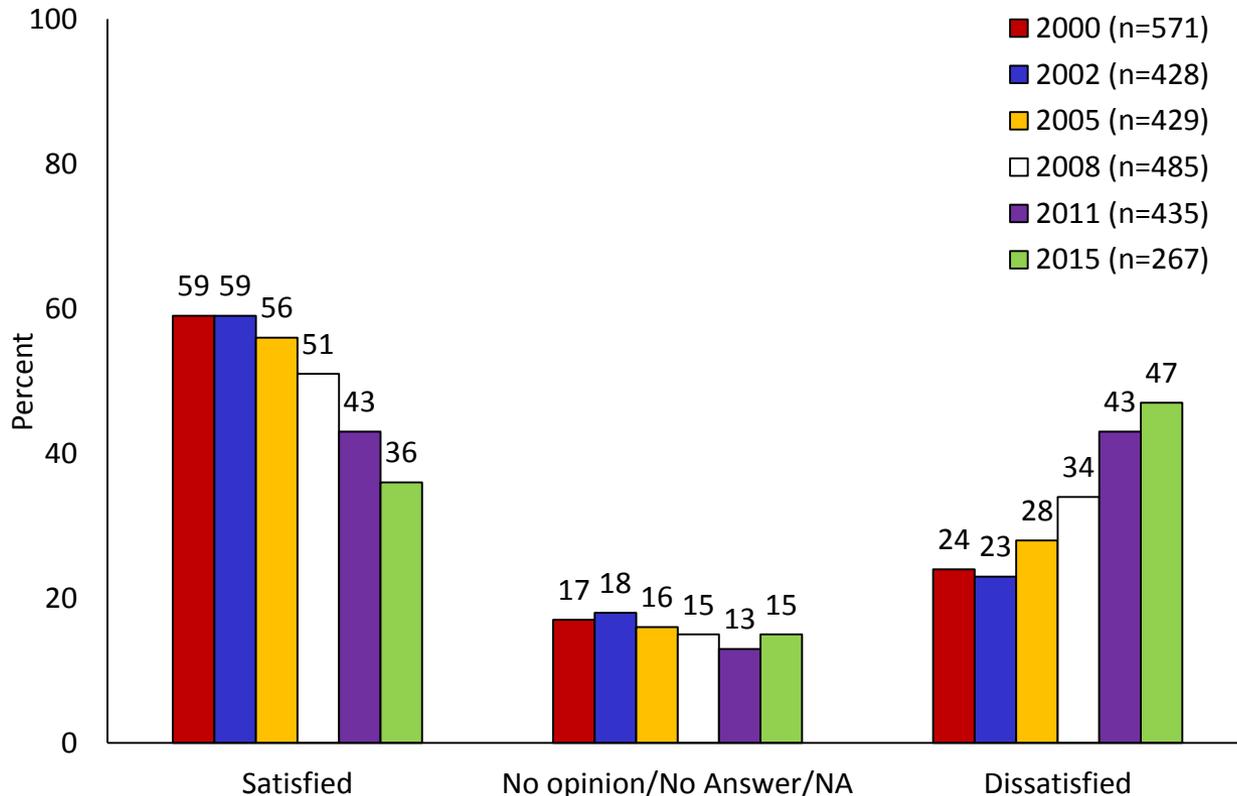
The satisfaction level for these providers is very low (36%), with only 6% being “Very satisfied.”

Again, by comparison, PWD’s satisfaction level stands at 82%, with 48% “Very satisfied.”

* In past measurements, the item referred to “local cable TV provider,” but was modified in 2015 given the rise in alternative pay TV services.

Trends in Satisfaction with Cable TV Provider

*How satisfied are you with each of the following companies? Local Cable, Satellite or Pay TV Provider **



Consistent with similar data in other markets, satisfaction levels for cable TV in Greater Portland as measured in these studies have eroded over the past decade, with a concomitant rise in overt dissatisfaction.

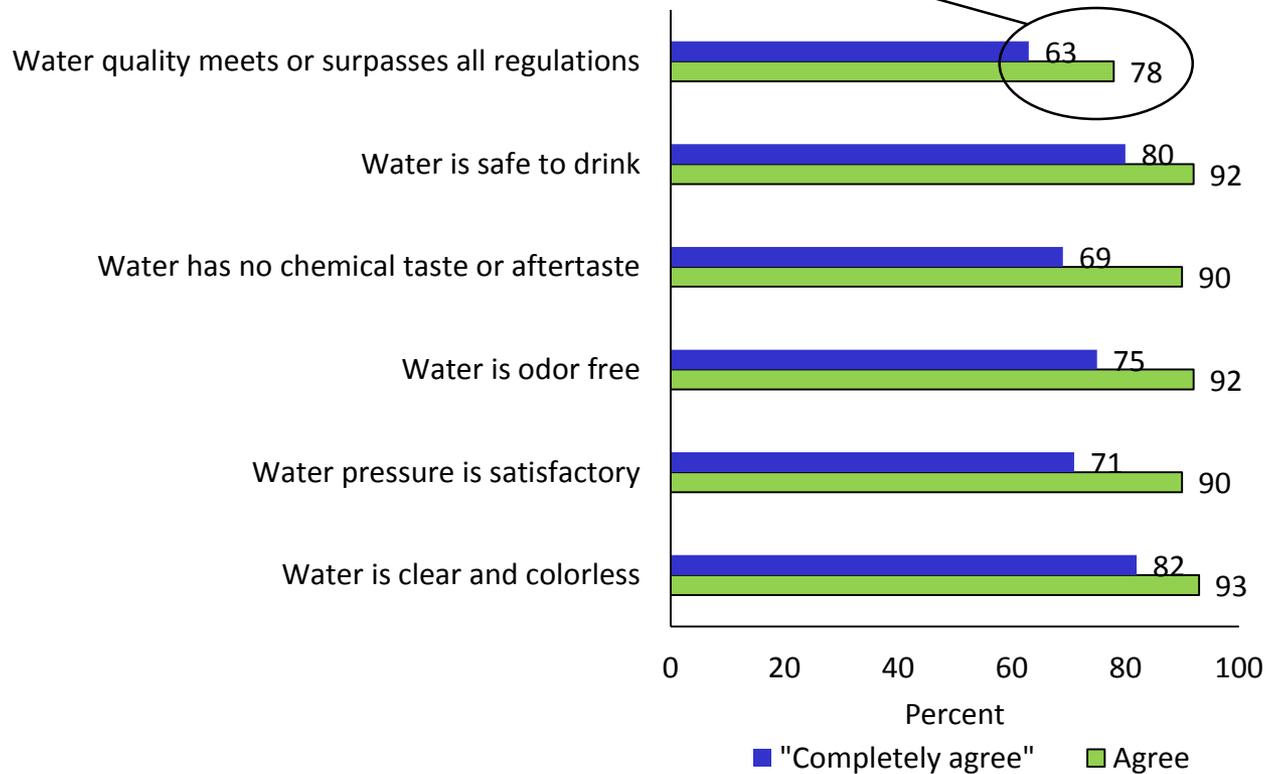
* In past measurements, the item referred to “local cable TV provider,” but was modified in 2015 given the rise in alternative pay TV services.

Assessment of Water Quality

Summary Perceptions of PWD Water Quality

Sourced from Question 7A through 7F.

Figures are slightly lower than for other measures due to 19% claiming to "Neither agree nor disagree" or declining to respond to the item.



In current 2015 results, levels of agreement with all tested statements are exceedingly high and exceed 90% overall and 70% (or more) "Completely agree" for all measures except meeting/exceeding water quality regulations.

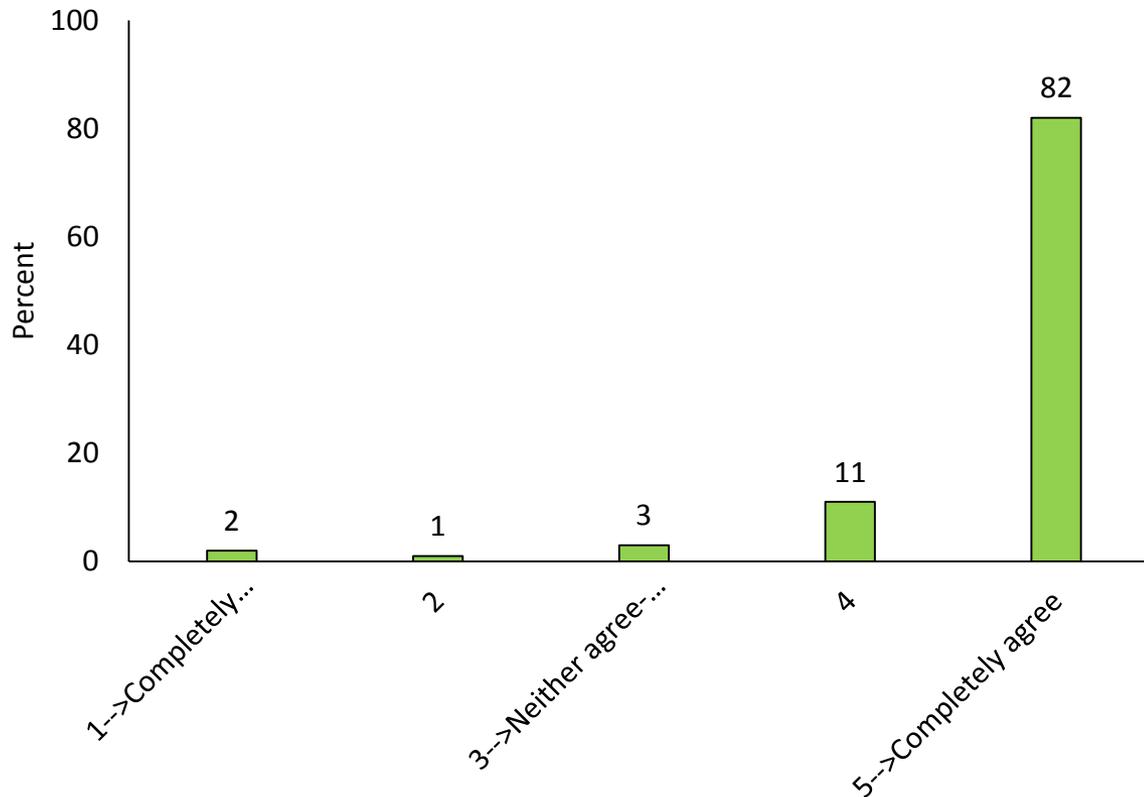
In this measure, fully 16% of respondents selected "No opinion" and 3% declined to answer, suggesting that PWD customers lacked sufficient knowledge to weigh-in on the issues involved in the statement.

Details on measurement and trend reporting for tested areas appear on the following pages.

Agreement that PWD Water is Clear/Colorless

Question 7A: For each of the following statements, please check one circle to indicate how much you agree or disagree:

Water is clear and colorless

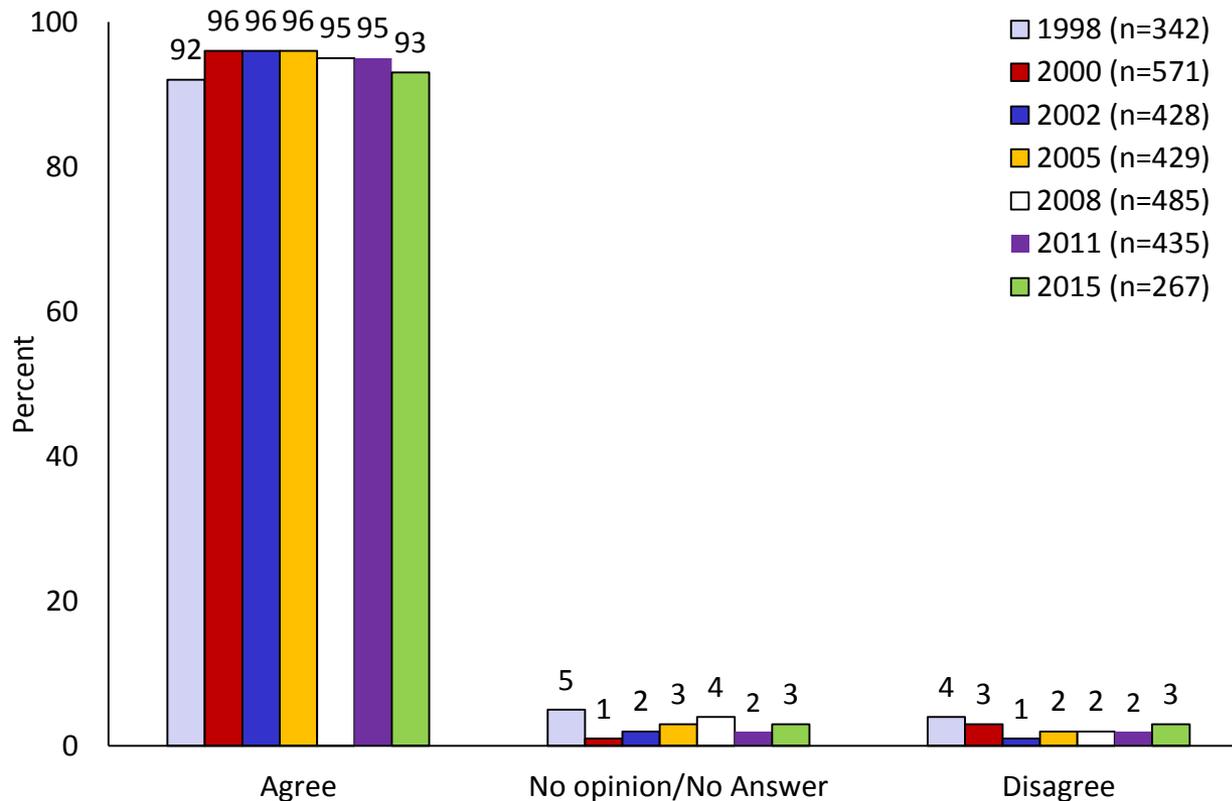


The vast majority (93%) of survey respondents agree that water from PWD is “clear and colorless,” including fully 84% who “Completely agree” with the tested statement.

Not surprisingly, fully 91% of those who are “Very satisfied” with the Water District overall also “Completely agree” that the water is clear and has no color.

Trends in PWD Water Being Clear/Colorless

For each of the following statements, please check one circle to indicate how much you agree or disagree: Water is clear and colorless



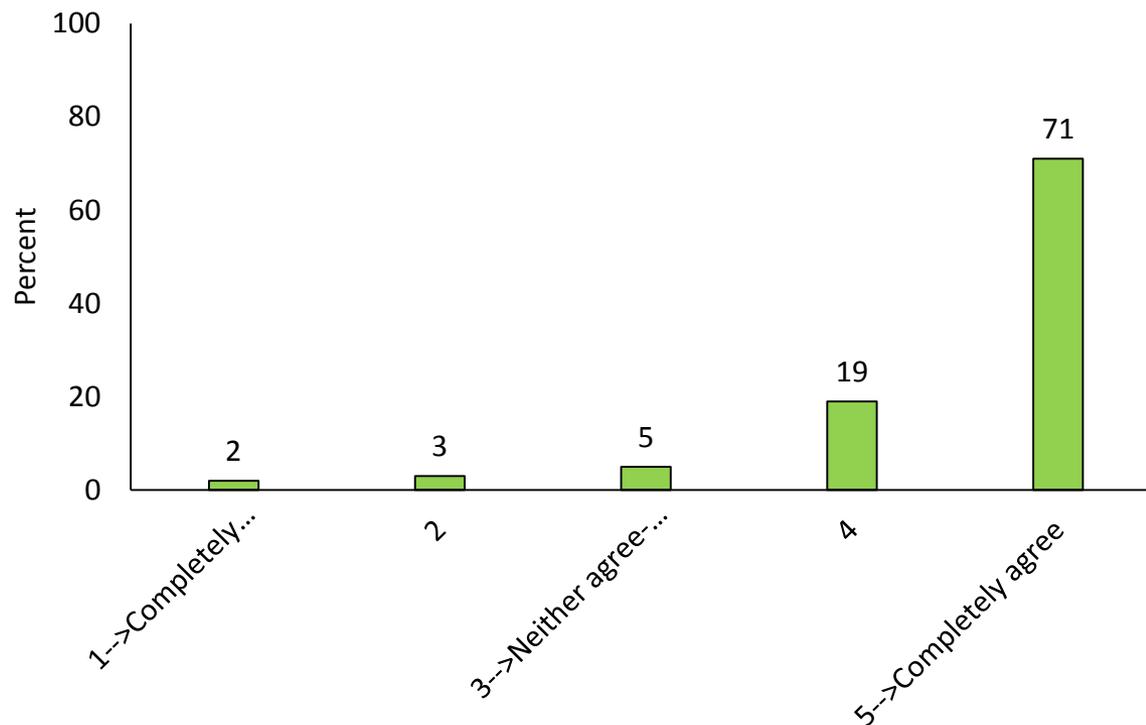
Results are markedly consistent with past iterations of the study, as more than 9-in-10 survey respondents agree that PWD water is “clear and colorless.”

Dating back to 2000, results have approximated 95% agreement.

Agreement that PWD Water Pressure is Satisfactory

Question 7B: For each of the following statements, please check one circle to indicate how much you agree or disagree:

Water pressure is satisfactory

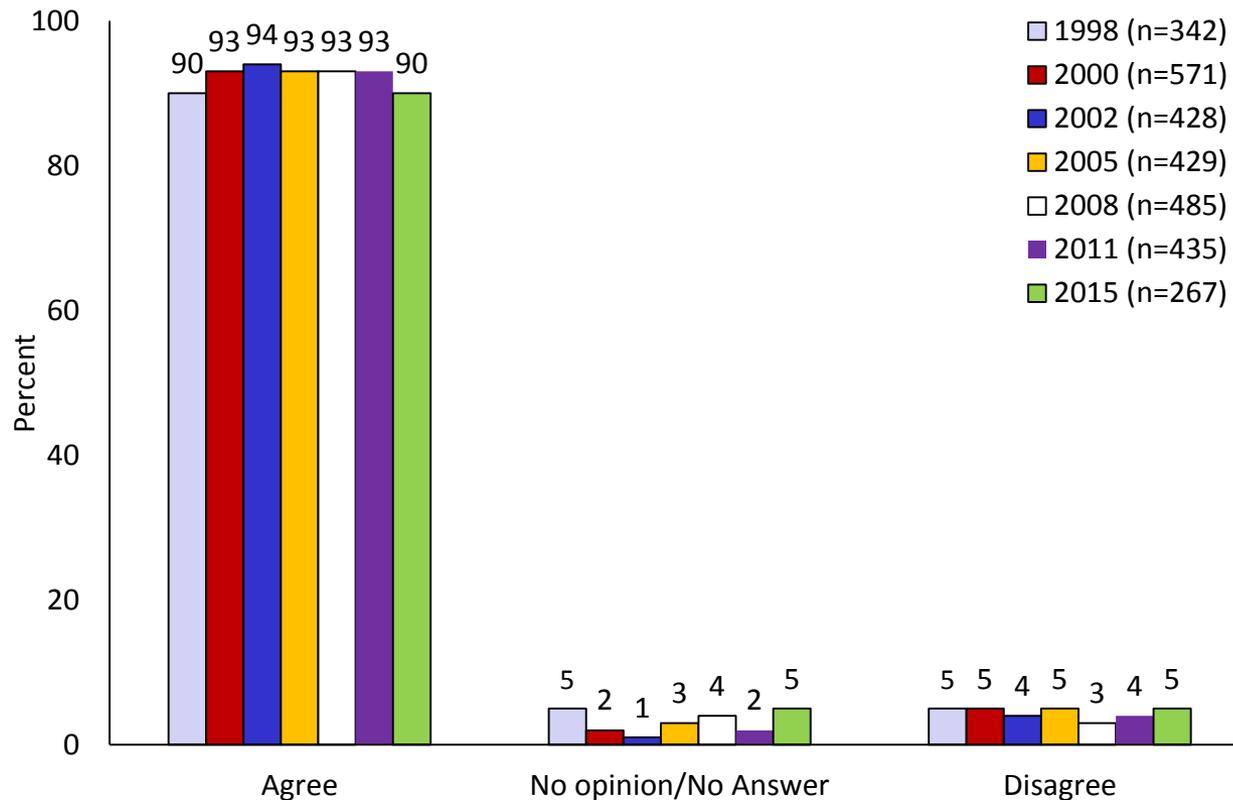


A strong majority (90%) of respondents agree that their “water pressure is satisfactory,” including nearly three-quarters (72%) who “Completely agree.”

Again, it is not surprising that 80% of those who are “Very satisfied” with PWD overall also “Completely agree” that their water pressure is acceptable.

Trends in PWD Water Pressure Being Satisfactory

For each of the following statements, please check one circle to indicate how much you agree or disagree: Water pressure is satisfactory



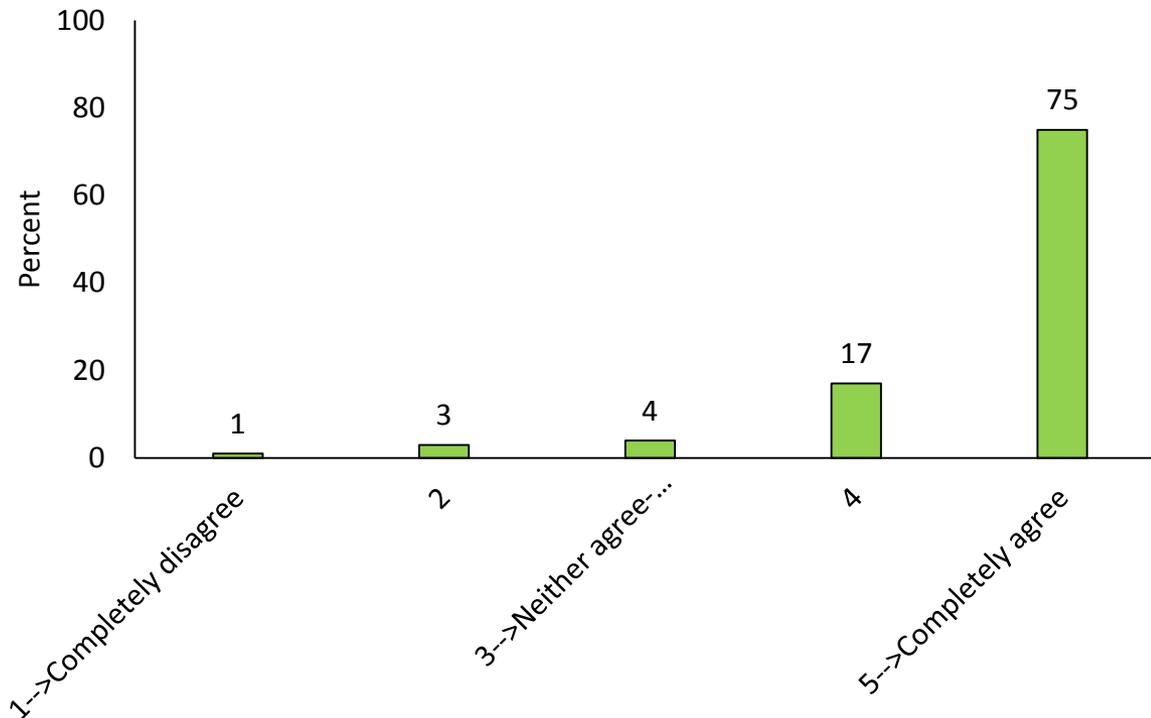
Trend data surrounding PWD water pressure is also very consistent over time.

Dating back to 1998, 9-in-10 (or more) residents surveyed have agreed that their water pressure is satisfactory.

Agreement that PWD Water is Odor Free

Question 7C: For each of the following statements, please check one circle to indicate how much you agree or disagree:

Water is odor free

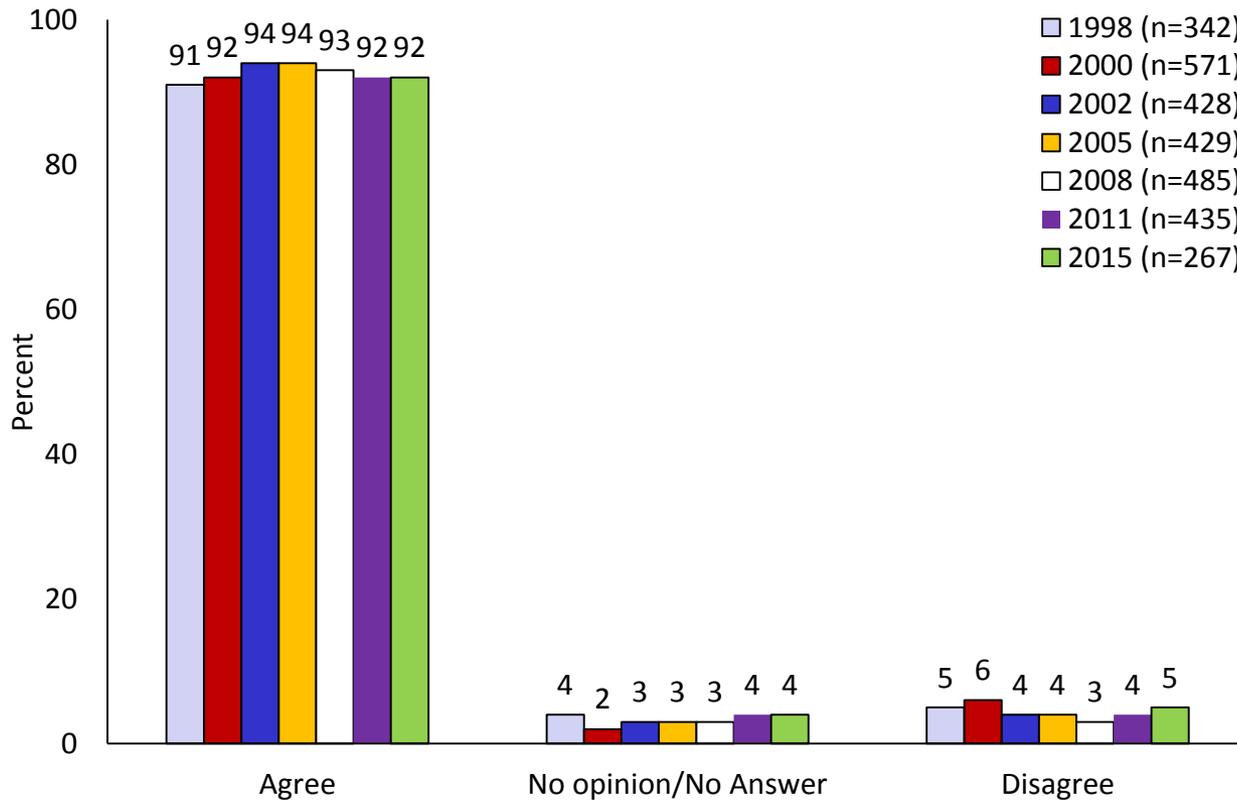


The vast majority (92%) of customers surveyed agree that water from PWD is “odor free,” including three-quarters (75%) who “Completely agree” with the statement.

Not surprisingly, 84% of those who are “Very satisfied” with the Water District overall also “Completely agree” that the water is has no odor. Complete agreement is also higher among residents in the 35-54 age band (82%).

Trends in PWD Water Being Odor Free

For each of the following statements, please check one circle to indicate how much you agree or disagree: Water is odor free



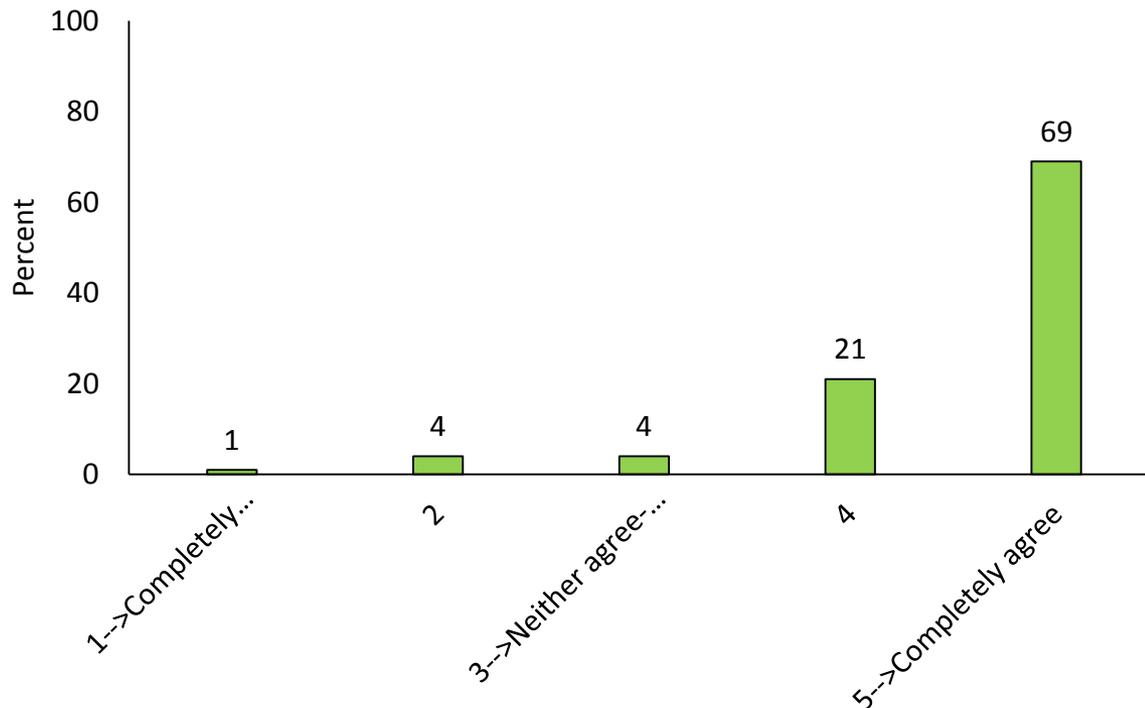
Results concerning an odor of PWD water are very consistent with past iterations of the study, with more than 9-in-10 respondents agreeing that PWD water is “odor free.”

Dating back to 1998, results have all been at or above 91% agreement.

Agreement that PWD Water Has No Chemical Taste/Aftertaste

Question 7D: For each of the following statements, please check one circle to indicate how much you agree or disagree:

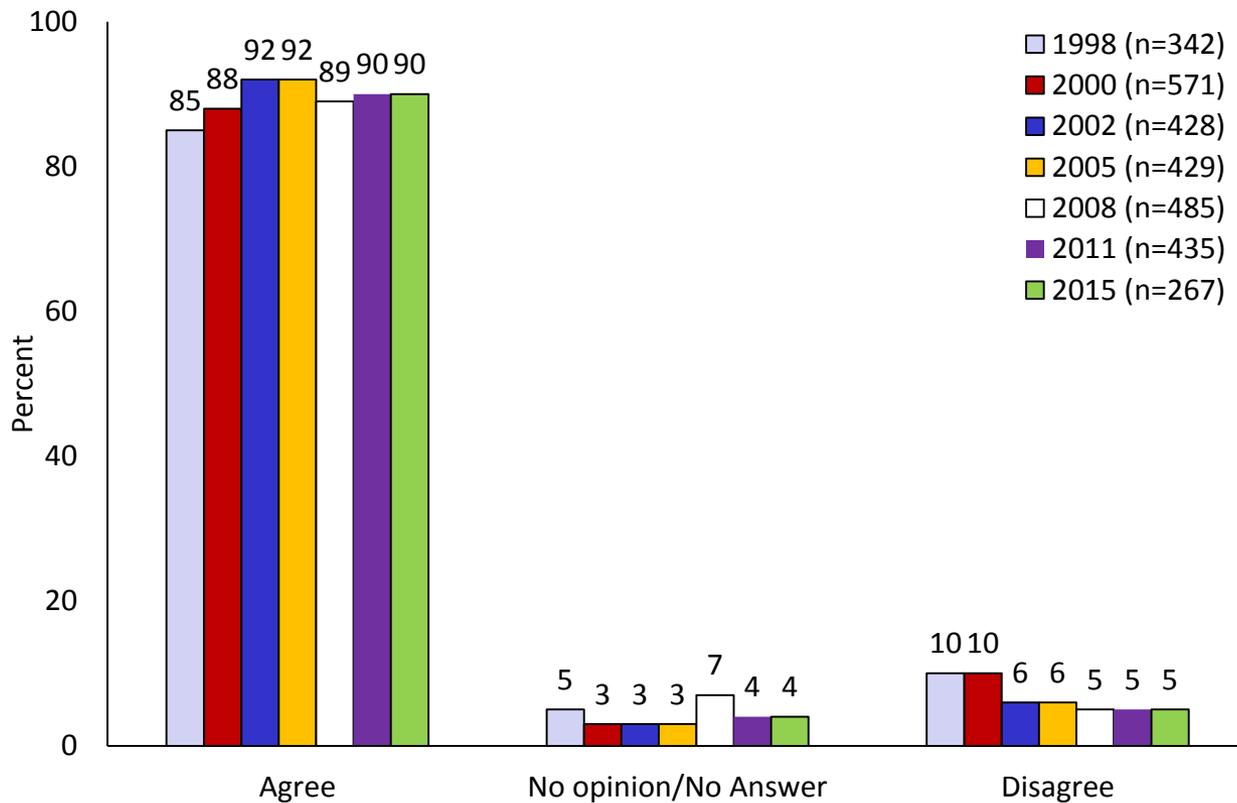
Water has no chemical taste or aftertaste



A strong majority (90%) of survey respondents agree that water from PWD is “has no chemical taste or aftertaste,” and 69% “Completely agree.”

Trends in PWD Water Having No Chemical Taste/Aftertaste

For each of the following statements, please check one circle to indicate how much you agree or disagree: Water has no chemical taste or aftertaste



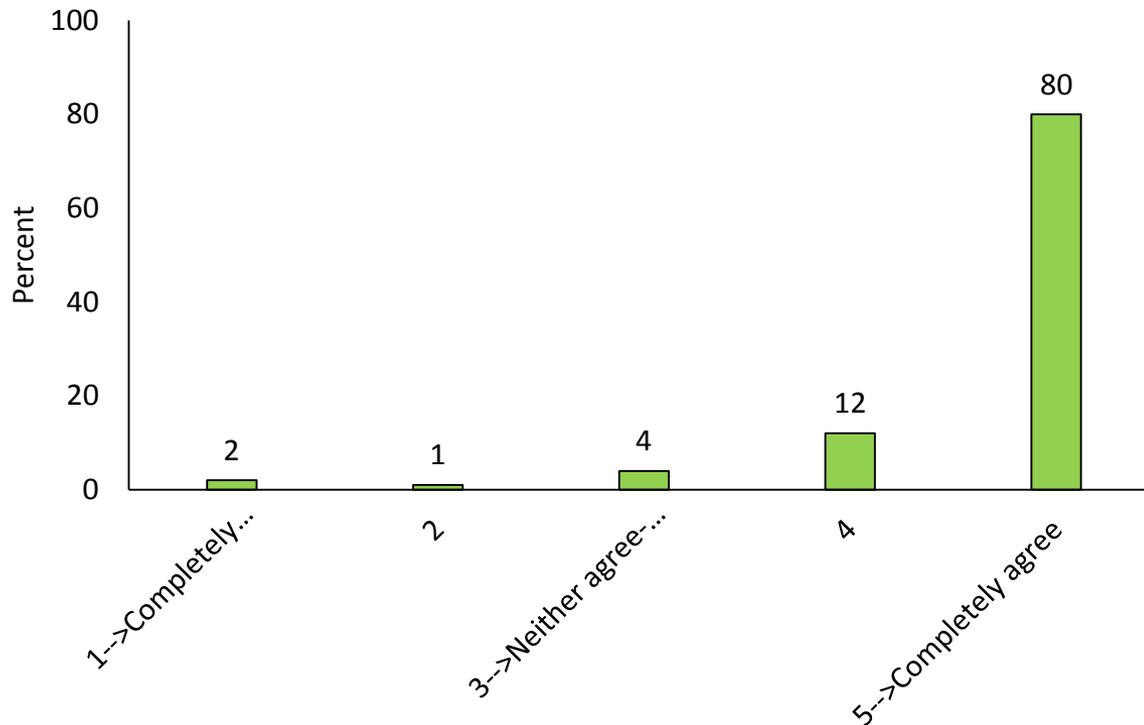
Trend data surrounding customers' perceptions of their water being free of any chemical taste or aftertaste have also remained very consistent over time.

Dating back to 2000, between 88% and 92% of survey respondents have agreed that their water "has no chemical taste or aftertaste."

Agreement that PWD Water is Safe to Drink

Question 7E: For each of the following statements, please check one circle to indicate how much you agree or disagree:

Water is safe to drink

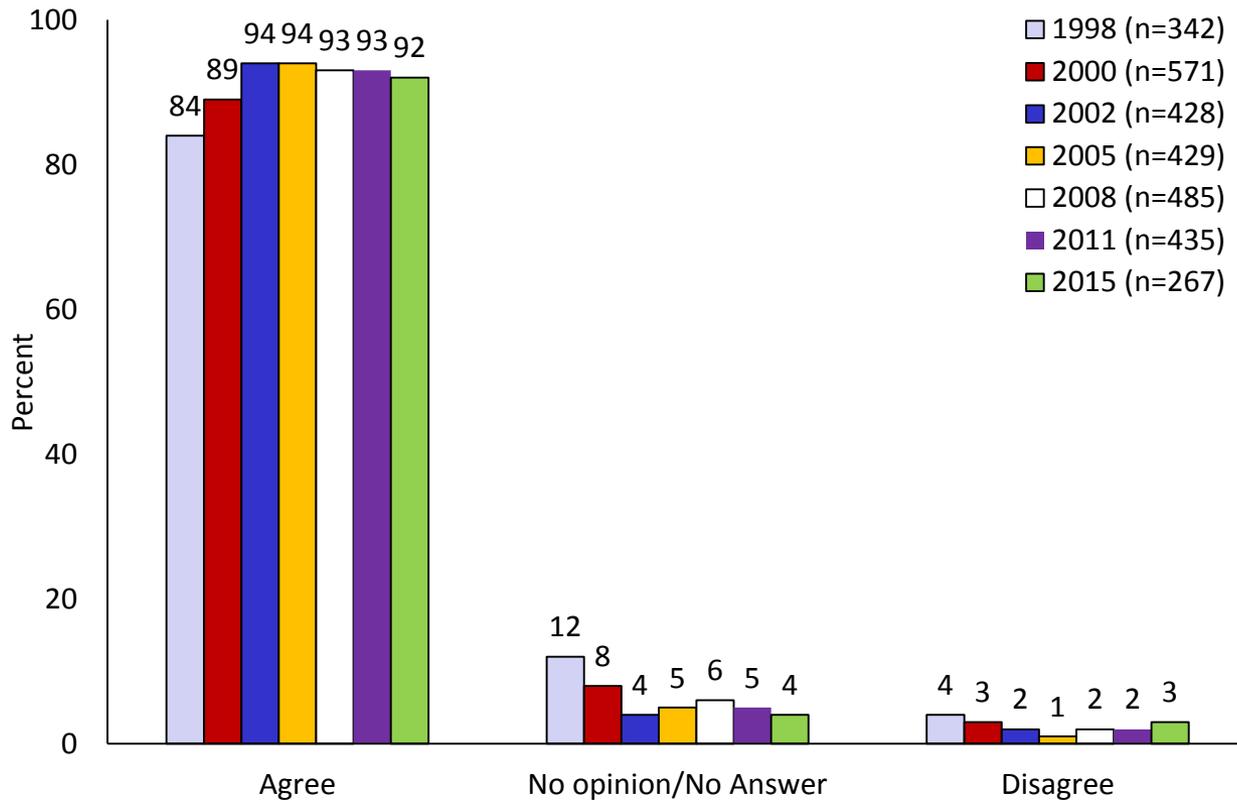


Most residents surveyed (92%) agree that water from PWD is “safe to drink,” including fully 80% who “Completely agree” with the statement.

Not surprisingly, fully 88% of those who are “Very satisfied” with the Water District overall also “Completely agree” that the water is safe. Also, residents age 35-54 (82%) and 55-69 (87%) are also significantly more likely to “Completely agree” about the safety of PWD water.

Trends in PWD Water Being Safe to Drink

For each of the following statements, please check one circle to indicate how much you agree or disagree: Water is safe to drink



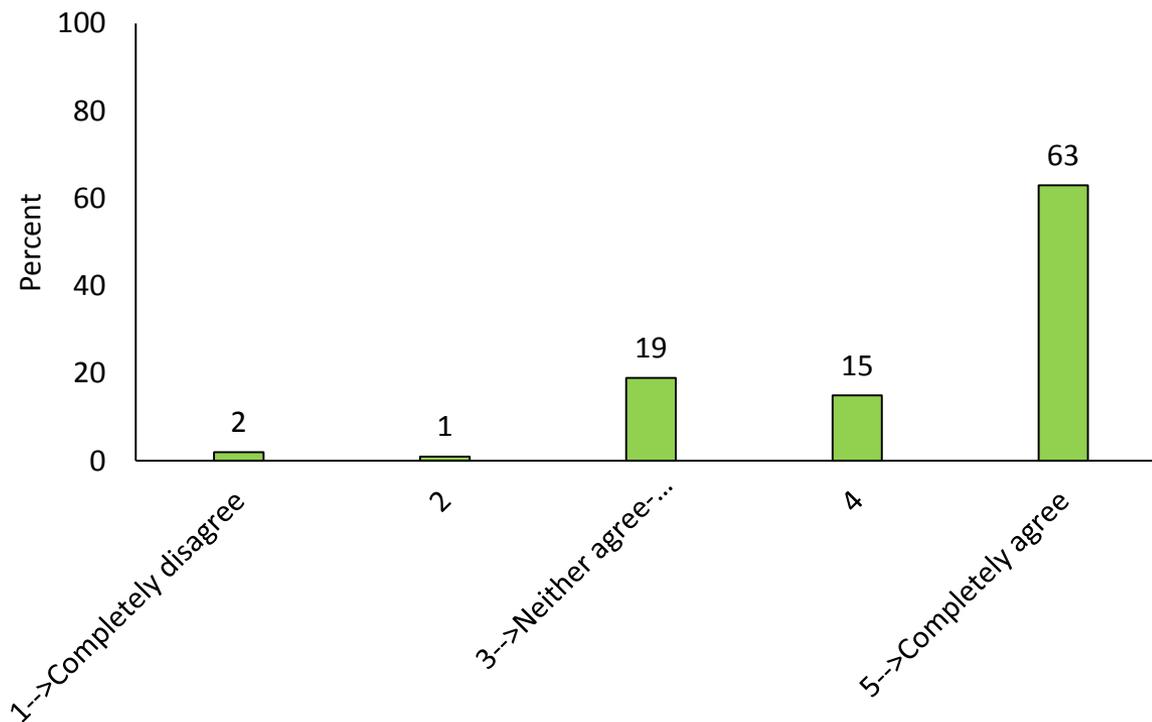
Over time, customer perceptions concerning the safety of water provided by PWD have also remained markedly consistent.

Dating back to 2002, either 92% to 94% have agreed that the “water is safe to drink.”

Agreement that PWD Water Meets/Surpasses All Regulations

Question 7F: For each of the following statements, please check one circle to indicate how much you agree or disagree:

Water quality meets or surpasses all regulations

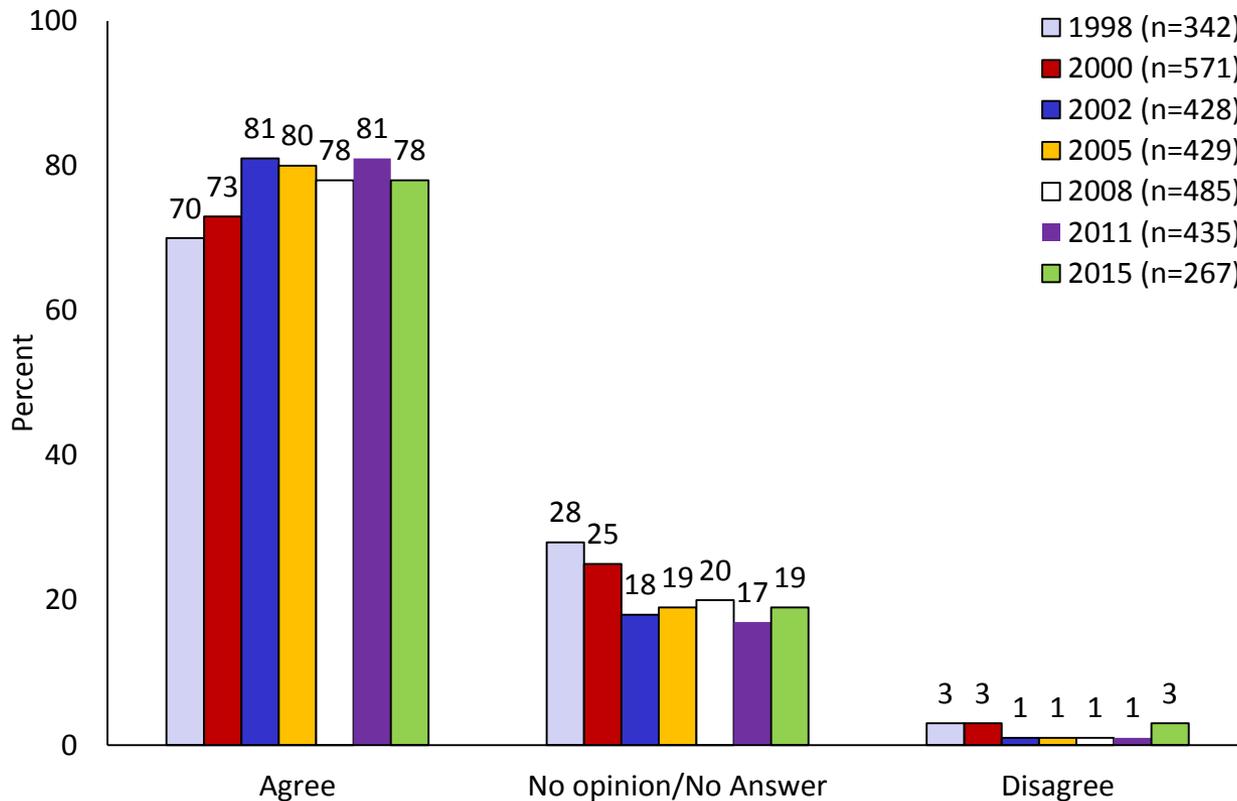


While most respondents (78%) agree that water from PWD “meets or surpasses all regulations,” this figure is somewhat attenuated by the 17% of respondents who it appears do not know enough to render an opinion and “Neither agree nor disagree” and the 3% who simply declined to answer.

Not surprisingly, 80% of those who are “Very satisfied” with PWD overall also “Completely agree” that the water meets or exceeds appropriate regulations. Those respondents age 55-69 also tend to be more likely to be in complete agreement (71%).

Trends in PWD Water Meeting/Surpassing All Regulations

For each of the following statements, please check one circle to indicate how much you agree or disagree: Water quality meets or surpasses all regulations



Trend data surrounding customers' perceptions of their water being free of any chemical taste or aftertaste have also remained consistent over time.

Dating back to 2002, between 78% and 81% of respondents have agreed that their water meets or exceeds all regulations.

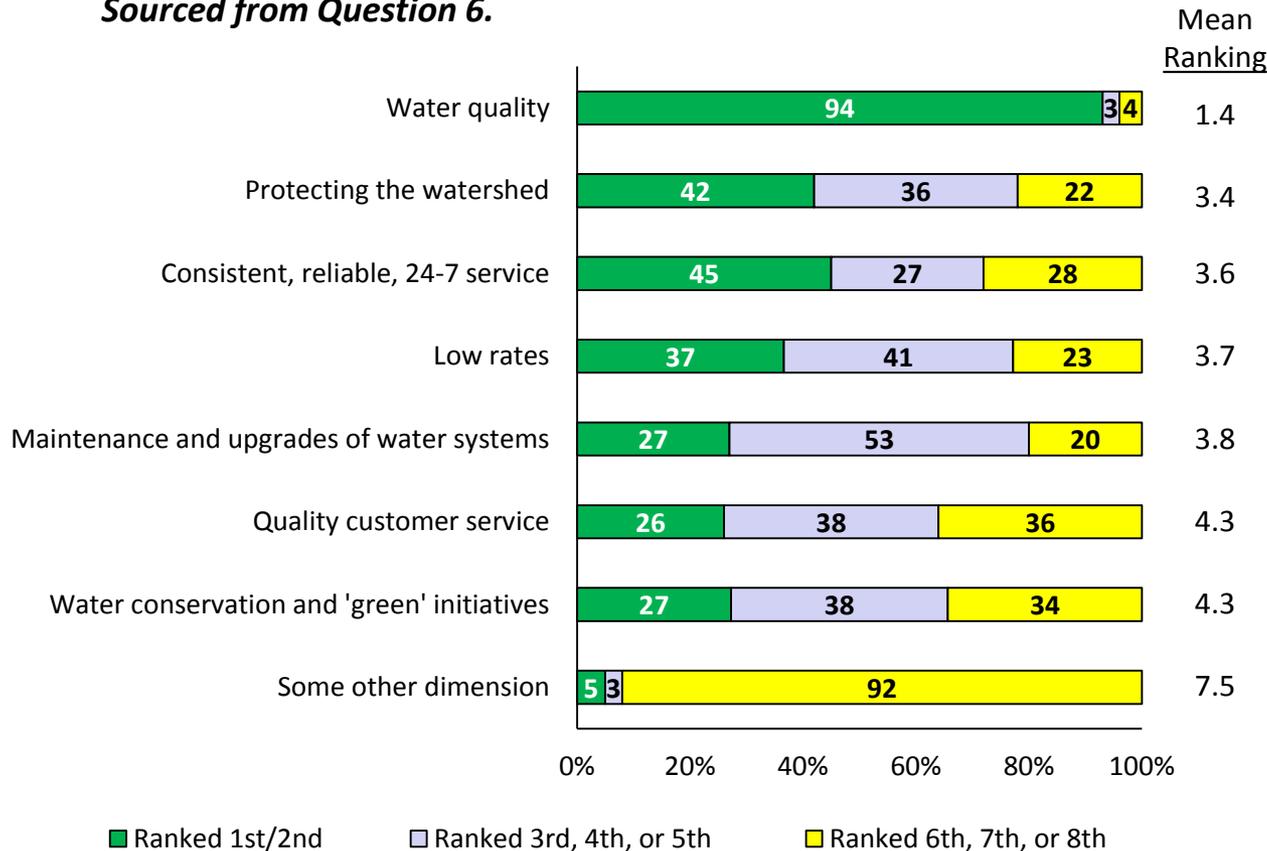
Assessment of Issue Importance

Assessment of Issue Importance

- The 2015 study modified the manner in which customers' views on dimensions of importance related to facets of performance, service delivery, and other attributes were measured.
- In past iterations of the study, customers gauged the importance of various dimensions on a 7-point scale of importance (from "Not at all important" to "Very important"). This approach yielded results in which many tested dimensions were deemed to be quite important, with limited ability to discriminate and differentiate the actual stated importance of some dimensions.
- The current round of measurement presented customers with seven different dimensions (as well as an "Other" option), with customers asked to rank them in descending order of importance, with 1 being the most important dimension, 2 the next most important, and so on, with the least important dimension ranked as 8.
- While survey respondents were instructed to only use each number once in creating their ranking hierarchy system, a number of respondents failed to do so and assigned the same level of importance to different dimensions.
 - As a result, aggregated figures for each numerical ranking will sum to greater than 100%.
 - This type of inconsistency is not entirely uncommon for self-administered questionnaires.

Summary Rankings of Dimensional Importance

Sourced from Question 6.



“Water quality” is by far the most important attribute among PWD customers surveyed.

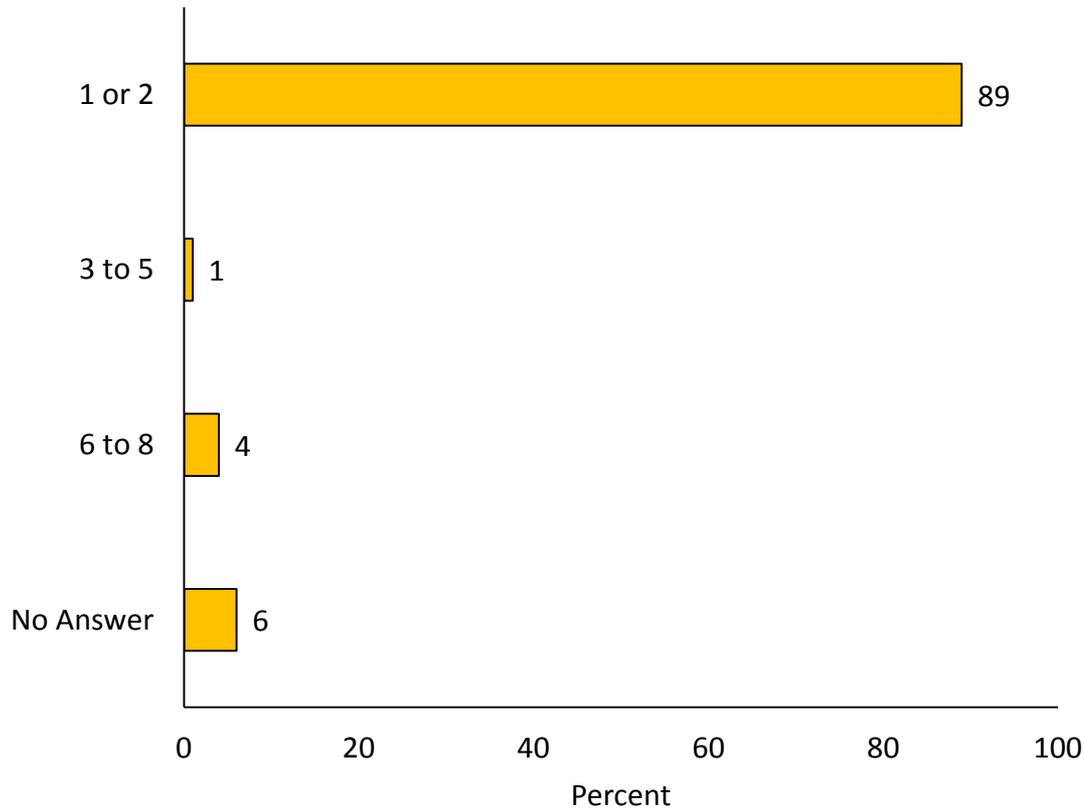
Protecting the watershed and *Consistent, reliable, 24-7 service* make up a 2nd tier of attributes beyond *water quality* in terms of dimensional importance.

Low rates fell fourth in the hierarchy, indicating that quality, reliability, and protection of the ultimate resource are comparatively more important than rates.

* Please note that the proportions in the above chart have removed all “No Answer” response data. Detailed charts on the following pages include “No Answer” options as a means of comparison.

Ranked Importance: Water Quality

Sourced from Question 6.

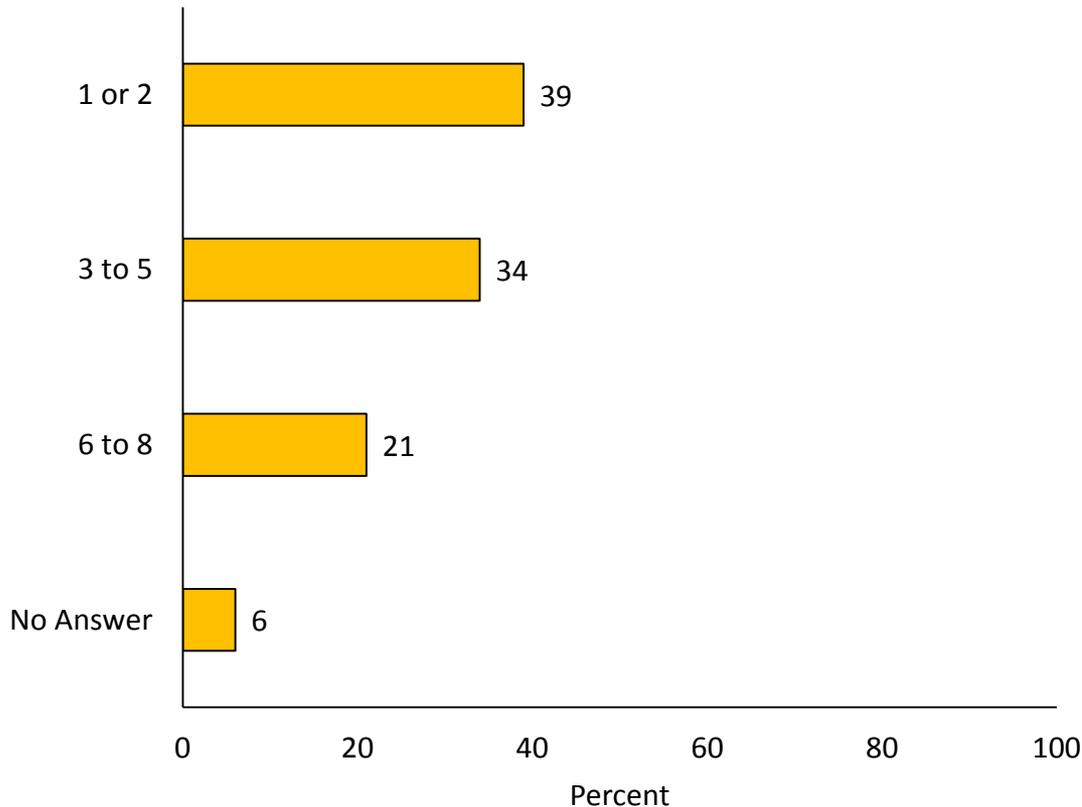


Fully 89% of survey respondents rank “water quality” first or 2nd in a hierarchy of importance and just 5% rank it lower in importance.

Interestingly, though it was still the most highly-ranked dimension, those without children in the home place significantly less importance on water quality.

Ranked Importance: Protecting the Watershed

Sourced from Question 6.



While ranked 2nd overall, views on the importance of watershed protection do vary somewhat.

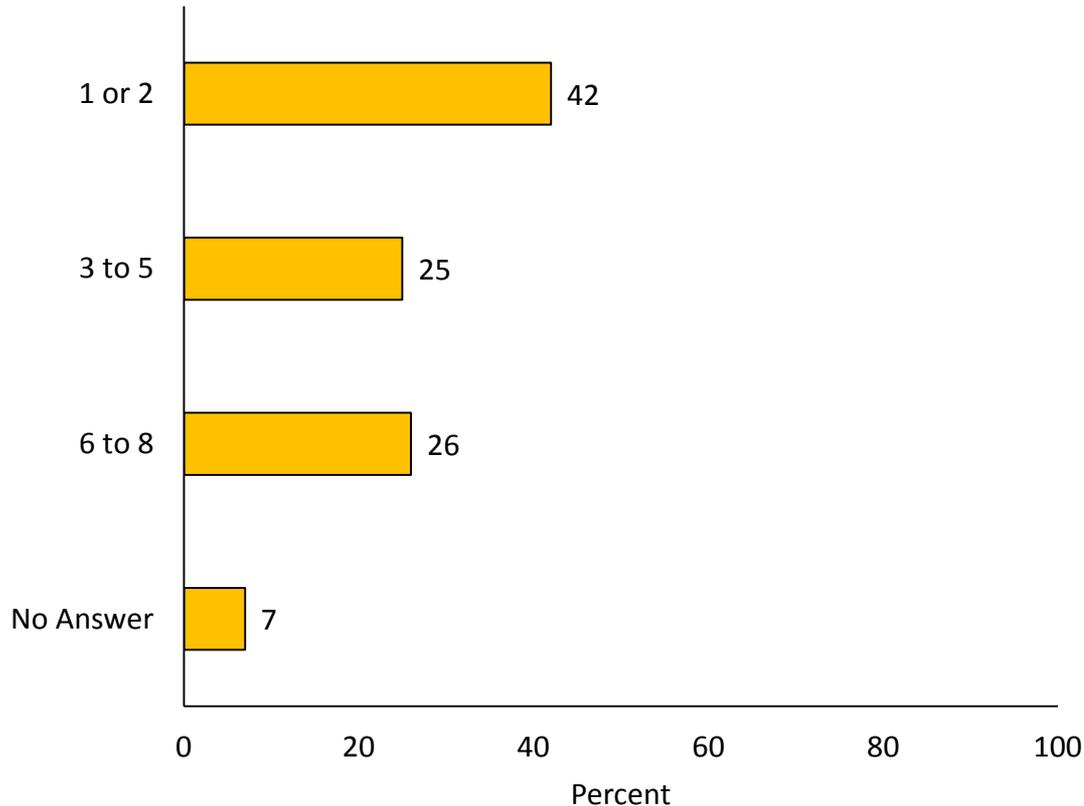
Roughly 4-in-10 (39%) rank “protecting the watershed” either 1st or 2nd. It is again a particularly salient dimension among older residents, as fully 52% of those age 70 or older rank it 1st or 2nd.

Another 36% rank it somewhere in the middle as a 3, 4, or 5.

Comparatively few (22%) rank it low in terms of importance at either 6, 7 or 8.

Ranked Importance: Consistent, Reliable, 24-7 Service

Sourced from Question 6.



Views on the importance of consistent, reliable, 24-7 service actually vary as well.

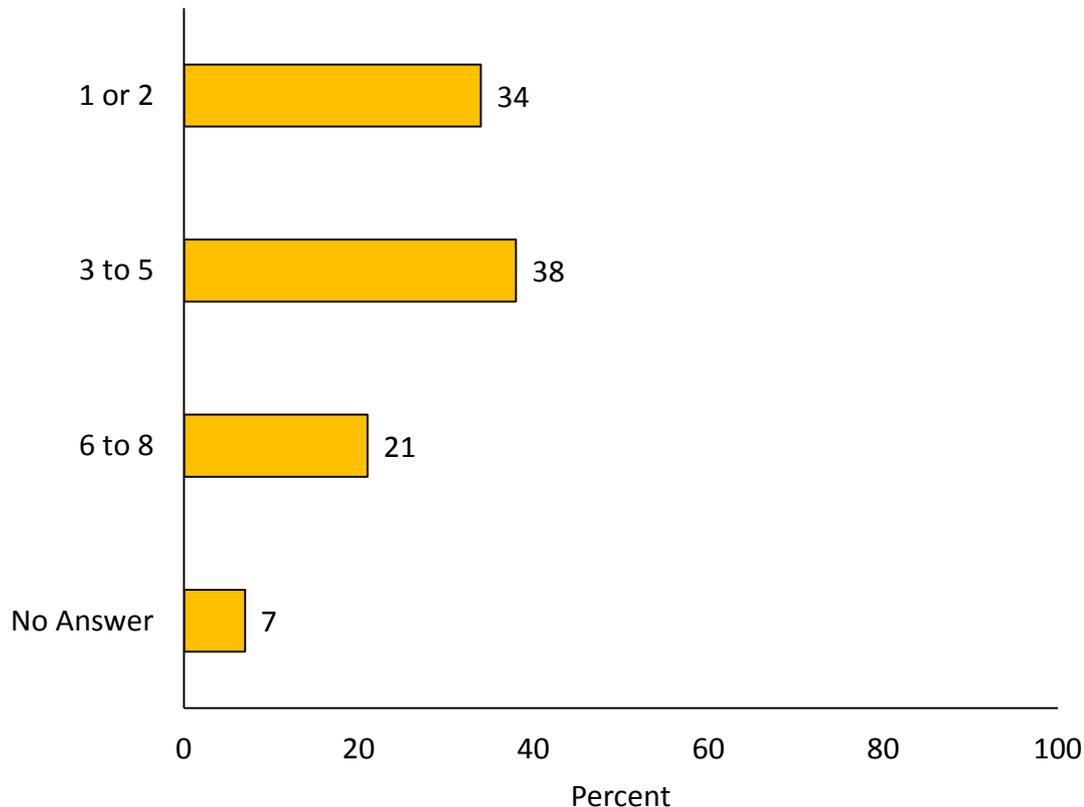
Ranked 3rd overall, more than 4-in-10 (42%) rank this dimension either 1st or 2nd, one-quarter (25%) rank it somewhere in the middle as a 3, 4, or 5.

However, a similar proportion (26%) rank it low in terms of importance at either 6, 7 or 8.

As with a number of other dimensions, a sizable bloc (53%) of those age 70+ rank this dimension as the #1 or 2nd most important area tested.

Ranked Importance: Low Rates

Sourced from Question 6.



Similarly, customer views on the importance of offering low rates also vary considerably.

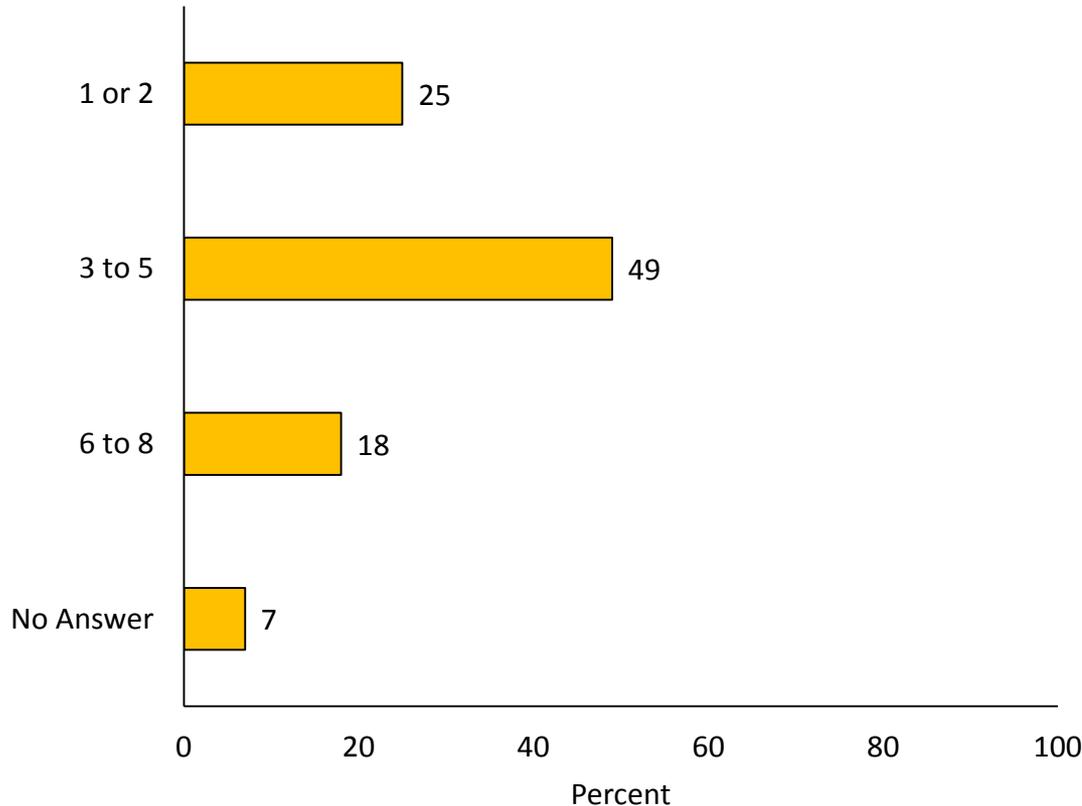
About one-third (34%) rank “low rates” either 1st or 2nd. It is a particularly salient dimension among older residents, as fully 39% of those age 70 or older rank it in their top two dimensions. However, it should again be noted that a number of older respondents ranked multiple dimensions as #1 in terms of importance.

Another 38% rank it somewhere in the middle as a 3, 4, or 5.

About 2-in-10 (21%) rank it low in terms of importance at either 6, 7 or 8.

Ranked Importance: Maintenance and Upgrades of Water Systems

Sourced from Question 6.



Results concerning the importance of maintaining PWD's infrastructure vary across the customers surveyed.

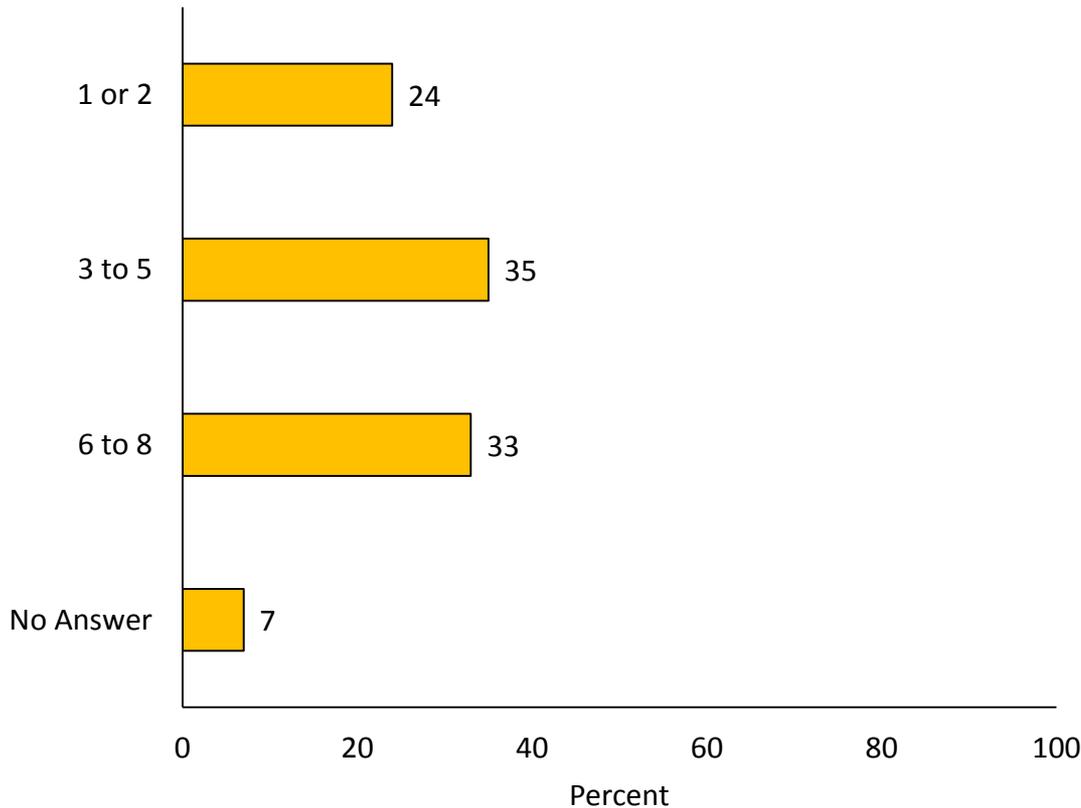
While one-quarter (25%) rank the dimension either 1st or 2nd, about half (49%) rank it somewhere in the middle as a 3, 4, or 5.

Importantly, just 18% rank maintenance and upgrades of systems as a low priority in terms of importance at either 6, 7 or 8.

Older residents again rank this as an important dimension, as 38% rank it 1st or 2nd.

Ranked Importance: Quality Customer Service

Sourced from Question 6.



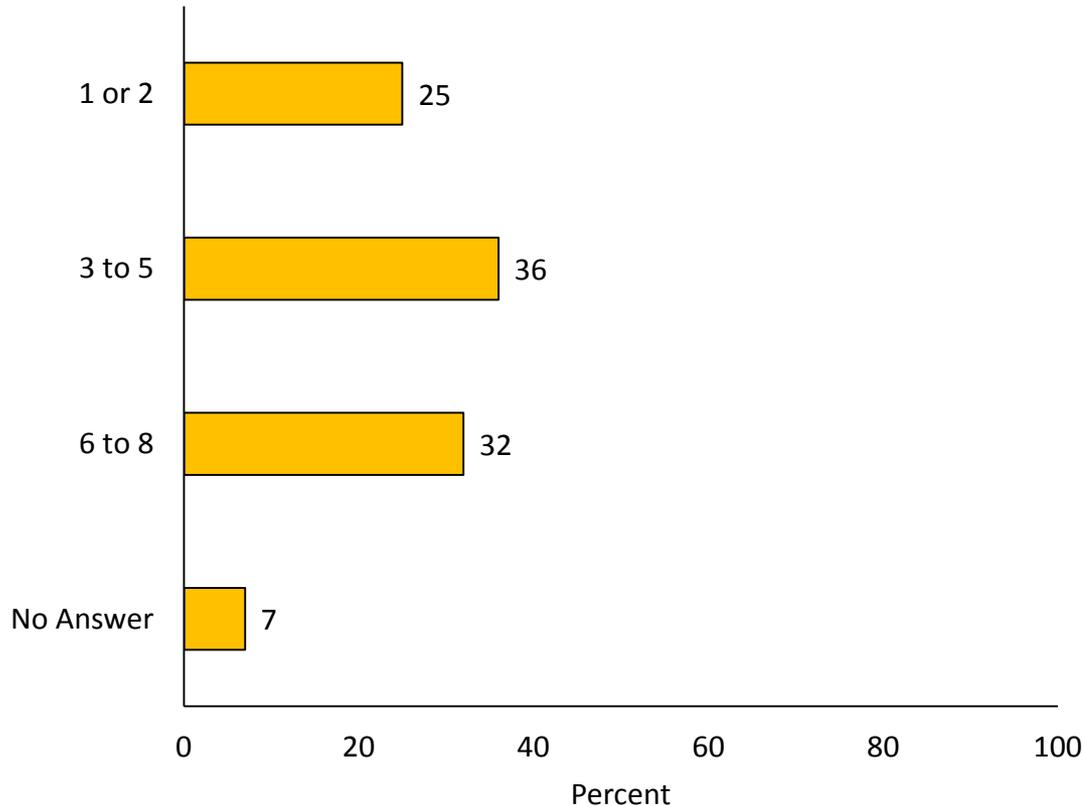
Interestingly, customer perceptions of the importance of customer service vary widely.

Indeed, while roughly one-quarter (24%) rank the dimension as either 1st or 2nd in terms of importance, another 35% rank it 3 through 5 and one-third (33%) rank it low, either 6th, 7th, or 8th.

Again, this was among several dimensions where older residents assigned a high level of importance, as fully one-third (36%) of these residents rank a high level of customer service as the #1 or #2 most important issue..

Ranked Importance: Water Conservation & Green Initiatives

Sourced from Question 6.



Results concerning the importance of water conservation and green initiatives also differ across the customer base surveyed.

While one-quarter (25%) rank the dimension either 1st or 2nd, another 36% rank it somewhere in the middle as a 3, 4, or 5.

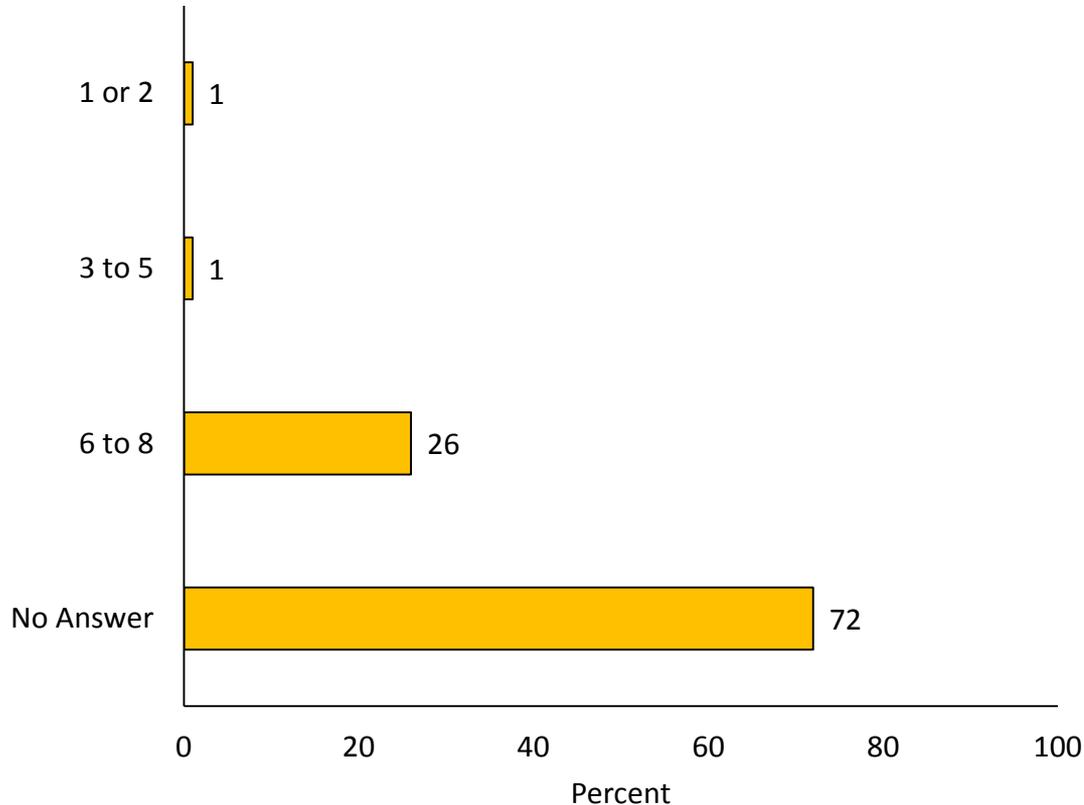
Another one-third (32%) rank it low in terms of importance at either 6, 7 or 8.

Older residents could be envisioning conservation initiatives affecting rates, as fully 37% rank it #1 or #2. Again, this is one of a number of dimensions these residents ranked highly in their hierarchy.

In other demographic examination, fully 40% of men rank it as a low priority.

Ranked Importance: Other

Sourced from Question 6.

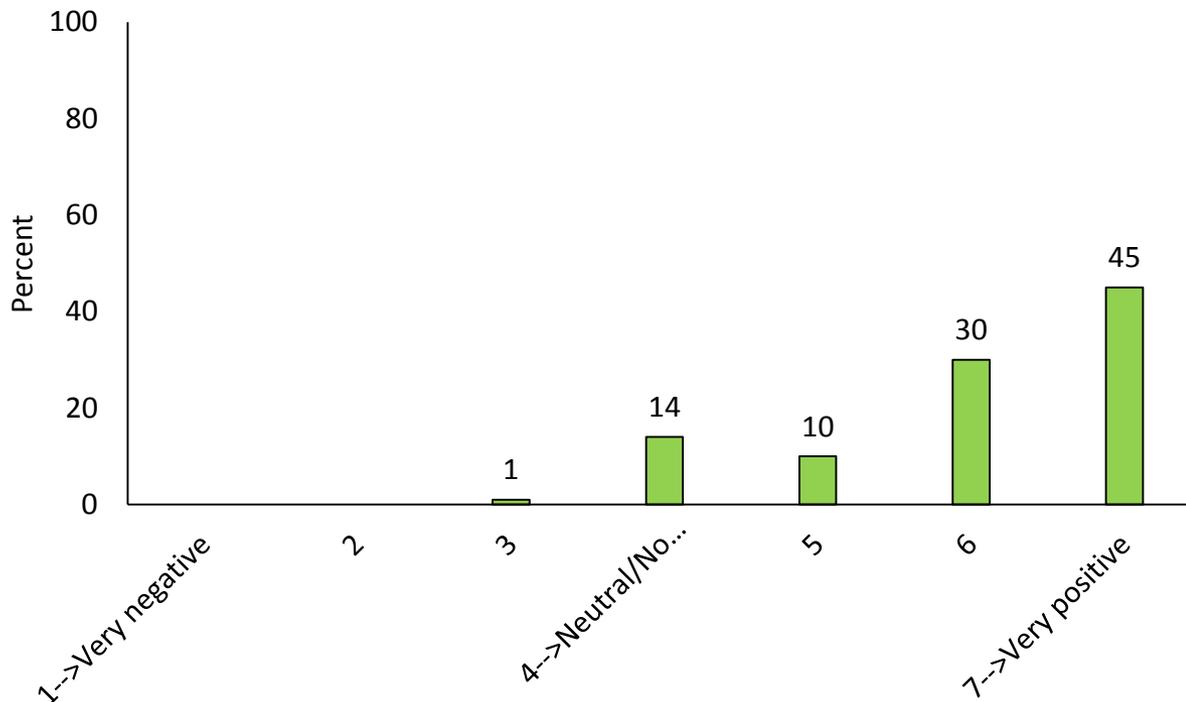


Few respondents rank some other dimension as anything but 8th in the hierarchy and most (72%) did not indicate any type of answer.

***Dimensions of
Organizational Reputation and Image***

Customers' Organizational Opinion of Portland Water District

Question 8: Using the scale below, please tell us your opinion of the Portland Water District, in other words how positively or negatively you feel about the Portland Water District?



In a broad measure of customer image, the vast majority (85%) of respondents to the 2015 study have a positive view of the Water District, including close to half (45%) who rate their perspective as "Very positive."

Interestingly, image of PWD becomes more favorable as customers age:

- Age 25-34: 17% "Very positive"
- Age 35-54: 43% "Very positive"
- Age 55-69: 44% "Very positive"
- Age 70+: 56% "Very positive"

Summary of PWD Image Measures

Sourced from Question 9A through 9H.



In current 2015 results, levels of agreement with all tested statements are strong and exceed 50% overall for each measure. The most robust measures for the Water District include public service, value for cost, and being seen as experienced and knowledgeable.

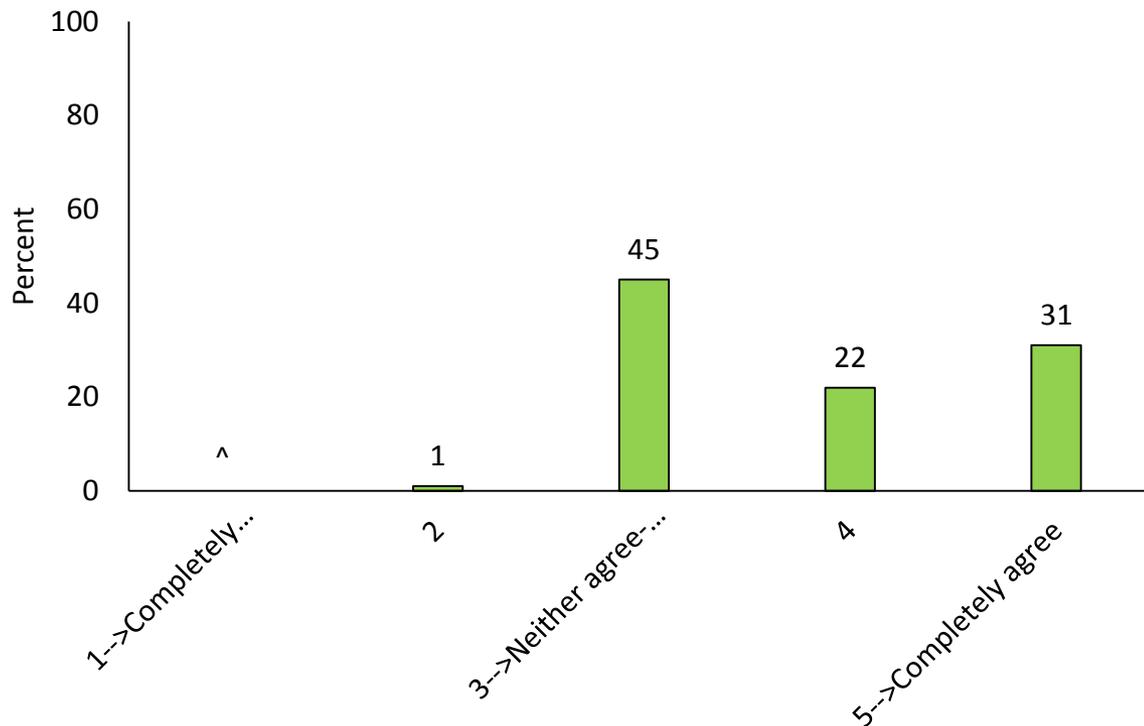
Results are attenuated somewhat by sizable blocs of customers who perhaps do not know enough to assess PWD on a particular dimension and selected "Neither agree nor disagree."

Details on measurement and trend reporting for tested areas appear on the following pages.

Agreement that PWD is Well-Run

Question 9A: For each of the following statements, please check one circle to indicate how much you agree or disagree:

Is a well-run organization



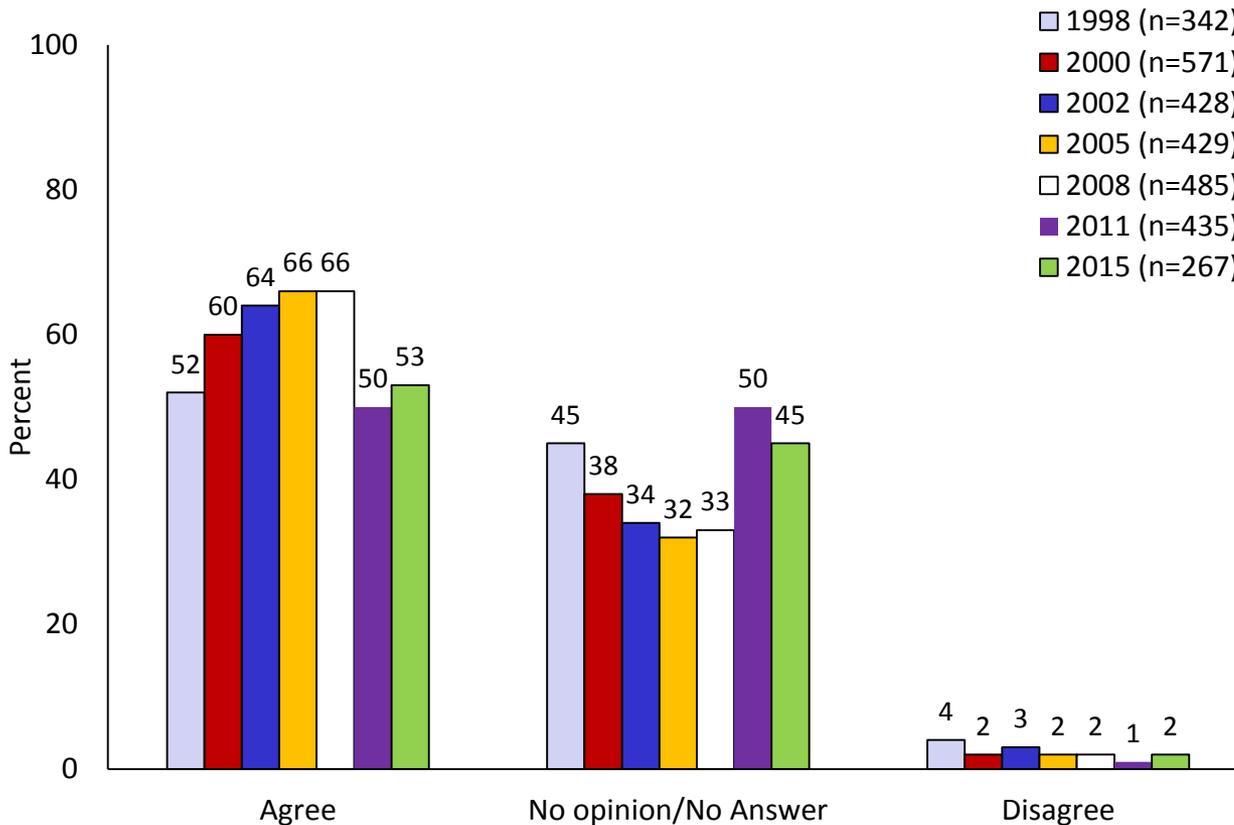
Over half of respondents (53%) agree that the Water District is a well-run organization and very few (2%) disagree.

The remaining 45% of respondents either declined to answer or likely do not know enough to venture an assessment and selected “Neither agree nor disagree”

^ Denotes proportion of less than 1%.

Trends in PWD Being Seen as Well-Run

For each of the following statements, please check one circle to indicate how much you agree or disagree: Is a well-run organization



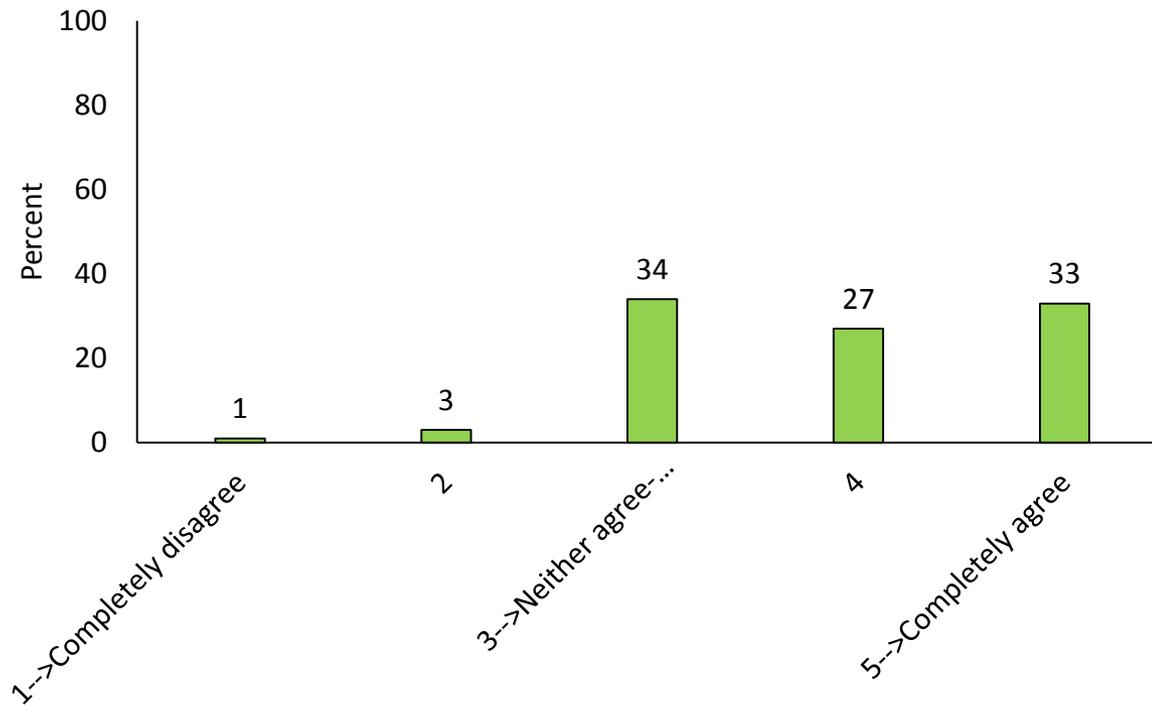
While overall trends continue to be highly favorable with very little negative feedback, the proportion of customers who are able or willing to render an opinion on the PWD being well-run has declined in the last two measurements.

From 2000 to 2008, roughly one-third of customers said they neither agreed nor disagreed (or declined to respond) and that figure rose to 50% in 2011 and currently stands at 45%.

Agreement that PWD Can Be Trusted to Do the Right Thing

Question 9B: For each of the following statements, please check one circle to indicate how much you agree or disagree:

Can be trusted to do the right thing

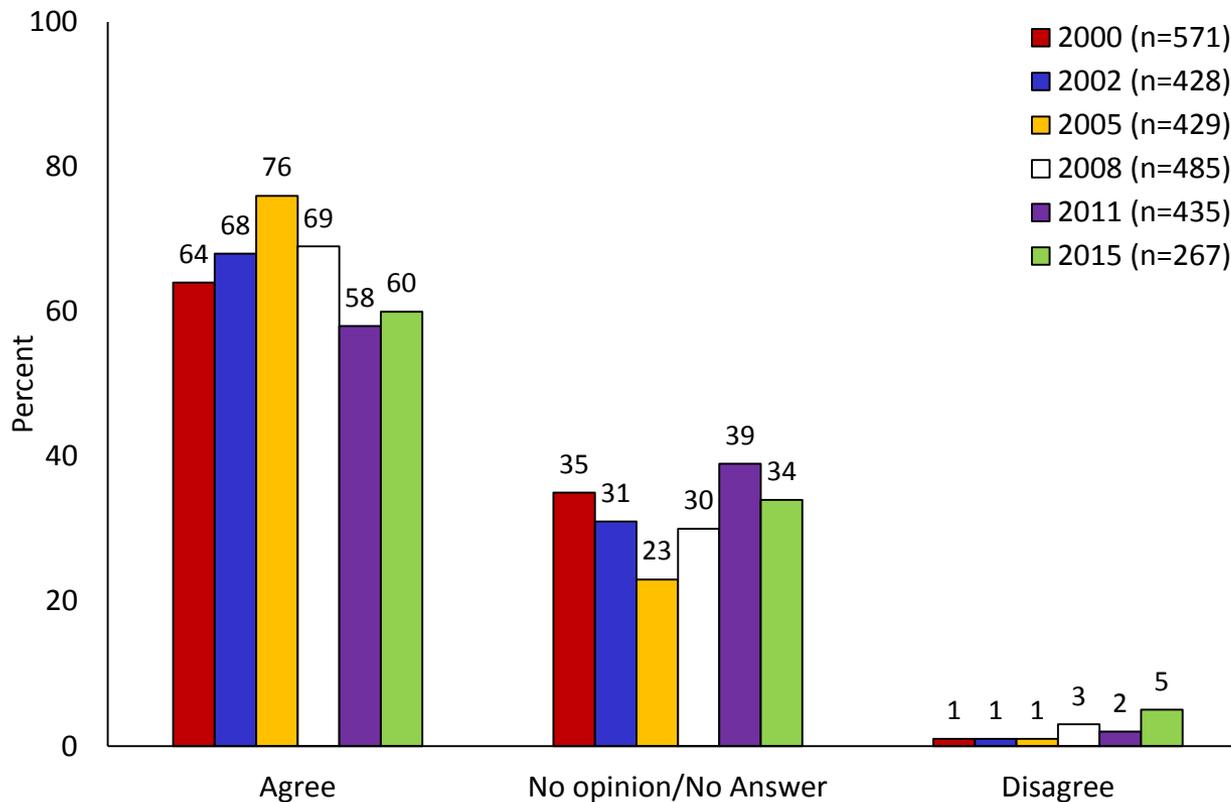


Trust in the Water District is solid, as 6-in-10 respondents (60%) agree that the organization can be trusted to do the right thing and few (5%) disagree.

The remaining one-third (34%) of respondents likely do not know enough to venture an assessment and selected “Neither agree nor disagree” or did not answer at all.

Trends in PWD Being Trusted to Do the Right Thing

For each of the following statements, please check one circle to indicate how much you agree or disagree: Can be trusted to do the right thing

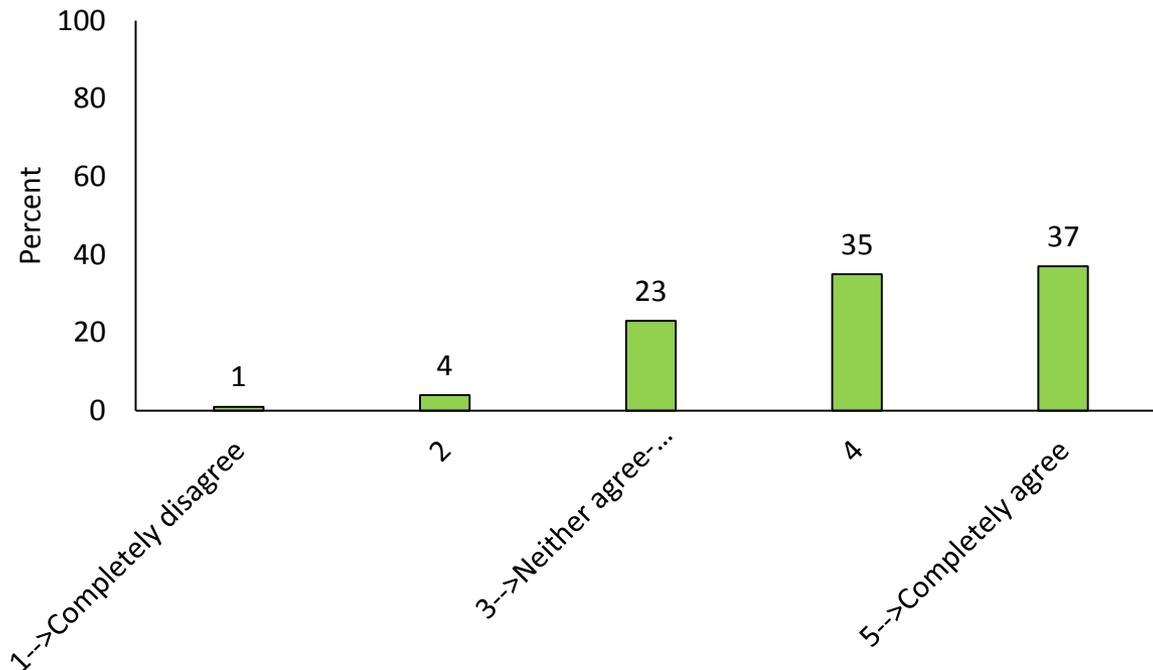


Aside from the 2005 measurement (when fully 76% of customers responded favorably and just 23% had no opinion), favorable results have generally been around 6-in-10 customers (or above) and results are consistent in the current measurement.

Agreement that PWD Gives Good Value for the Money

Question 9C: For each of the following statements, please check one circle to indicate how much you agree or disagree:

Gives good value for the money

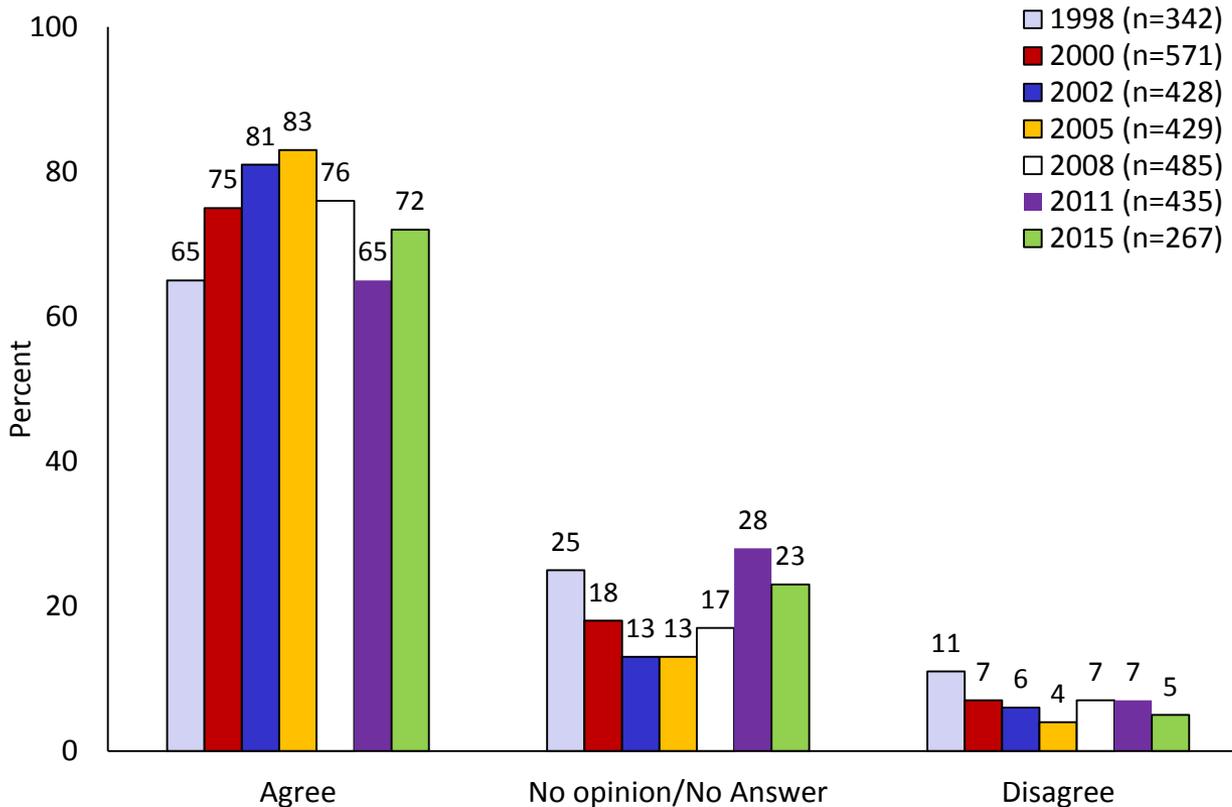


Close to three-quarters of respondents (72%) agree that PWD provides good value for the money and few (5%) disagree.

The remaining 23% of respondents selected "Neither agree nor disagree" or declined to provide a response.

Trends in PWD Giving Good Value for the Money

For each of the following statements, please check one circle to indicate how much you agree or disagree: Gives good value for the money



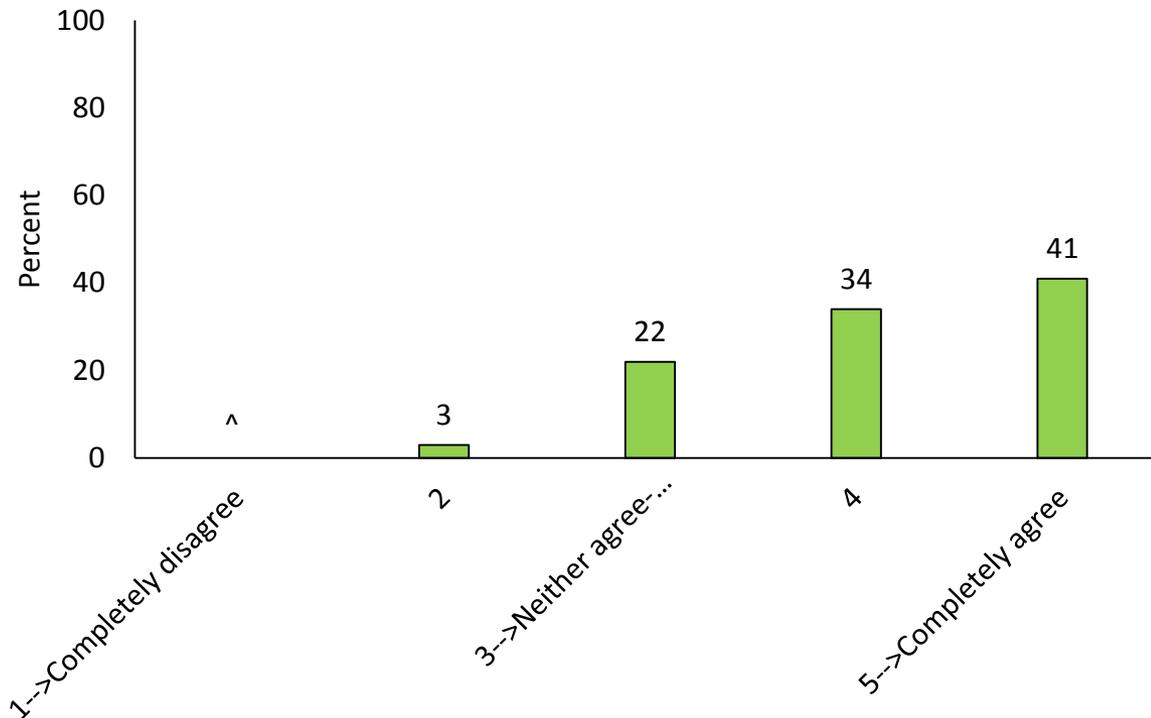
Overall trends in perceived value for cost continue to be very favorable with relatively little negative feedback, though some customers still remain unable or unwilling to render an opinion.

While 2002 and 2005 results represented a high mark for PWD, current results reflect a return to levels observed in 2008 (after a brief directional dip in 2011).

Agreement that PWD Serves the Public Well

Question 9D: For each of the following statements, please check one circle to indicate how much you agree or disagree:

Serves the public well



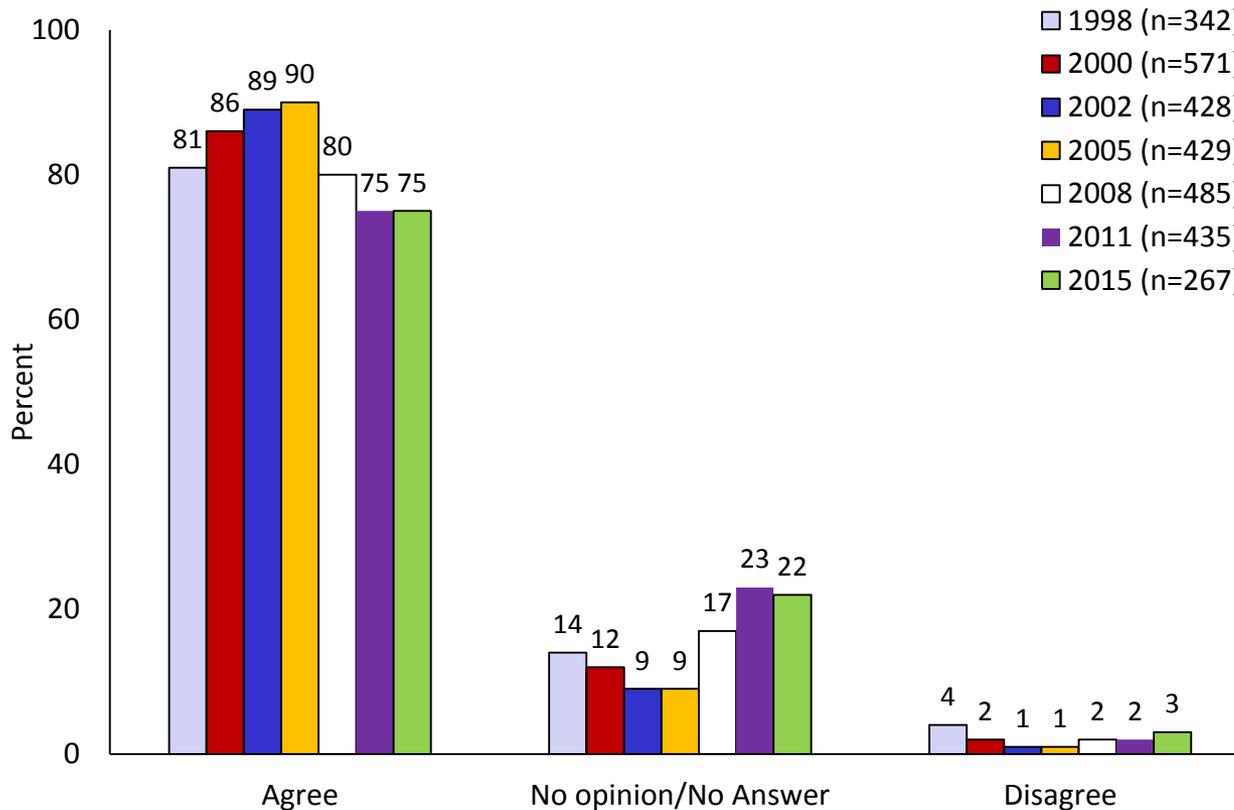
Three-quarters of respondents (75%) agree that the Water District serves the public well and very few (4%) disagree.

The remaining 2-in-10 respondents “Neither agree nor disagree” with the statement or did not respond, likely a reflection of not knowing enough to make an assessment.

^ Denotes proportion of less than 1%.

Trends in PWD Serving the Public Well

For each of the following statements, please check one circle to indicate how much you agree or disagree: Serves the public well



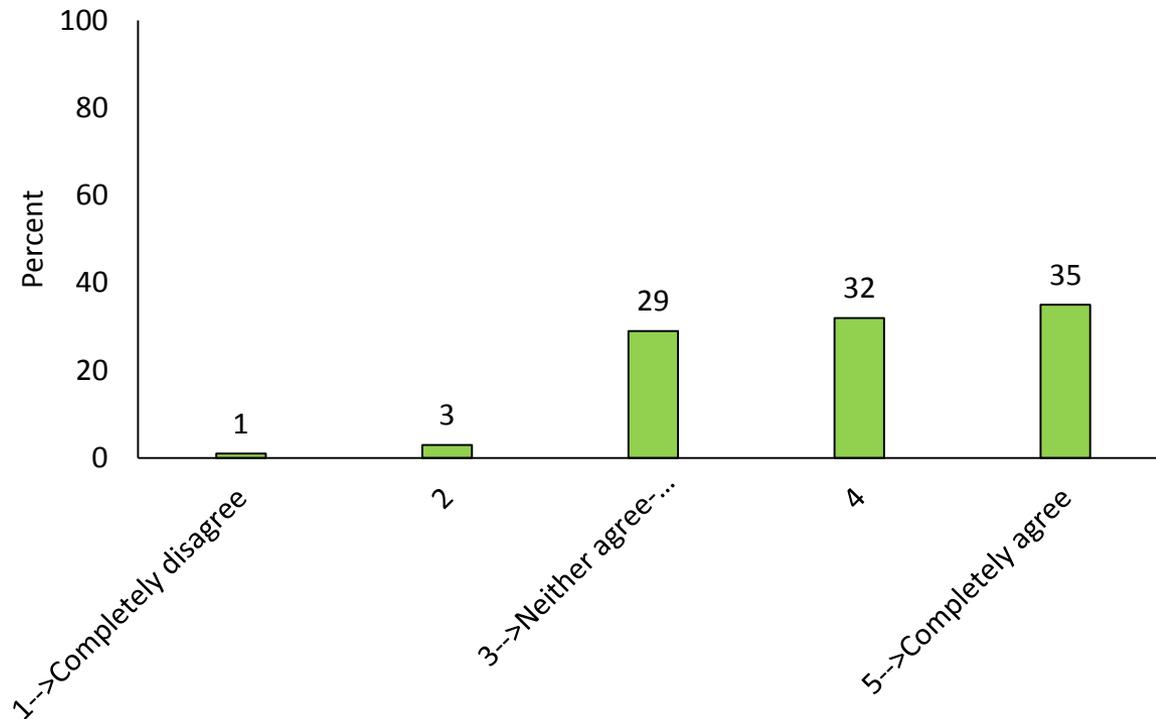
While overall trends continue to be very favorable with little negative feedback, the proportion of customers who are able to render an opinion on the PWD serving the public well has declined in the last three measurements.

As a result, through 2005, favorable feedback generally well exceeded 8-in-10 customers, but over the last three measurements, results have hovered around three-quarters of residents polled and currently stands at 75%.

Agreement that PWD Keeps the Public Informed

Question 9E: For each of the following statements, please check one circle to indicate how much you agree or disagree:

Keeps the public informed

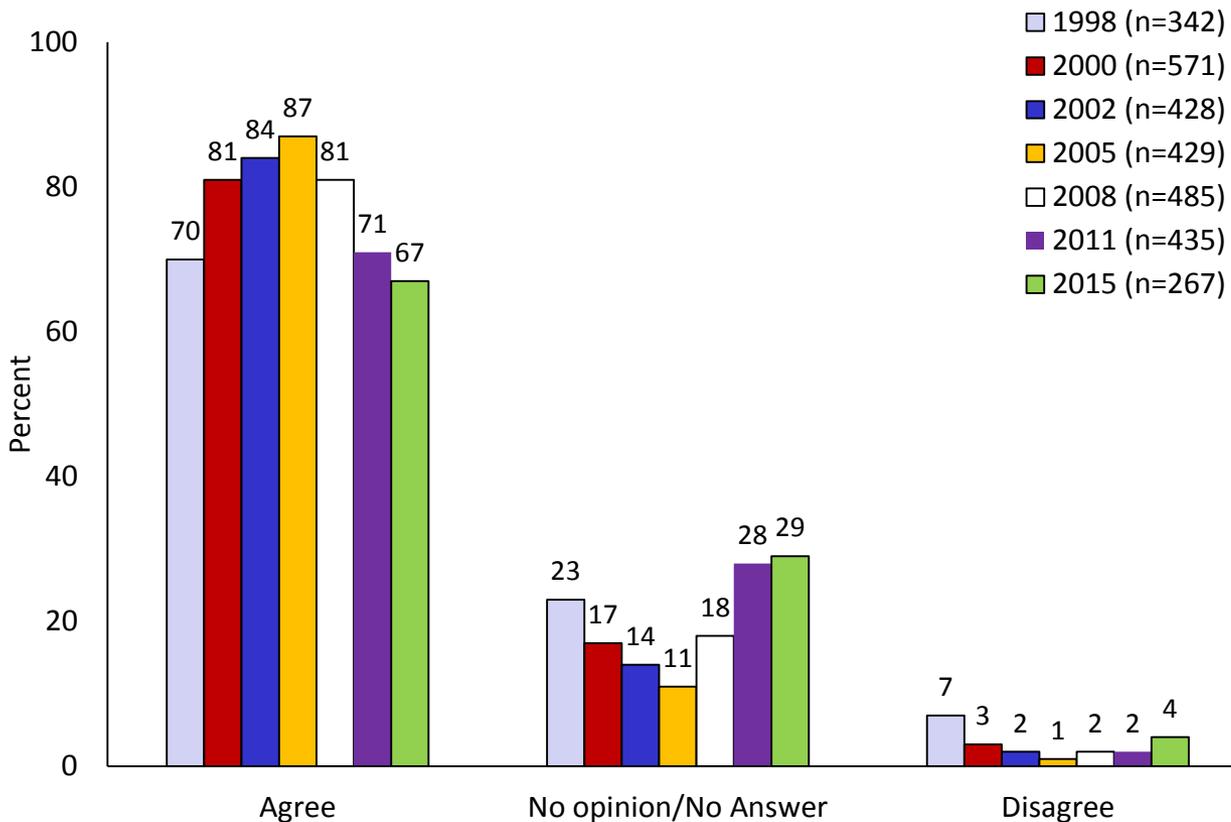


Two-thirds of survey respondents (67%) agree that the Water District keeps the public informed and few (4%) disagree.

Another close to 3-in-10 respondents (29%) likely do not know enough to venture an assessment of PWD's history of providing information to the public and either selected "Neither agree nor disagree" or did not provide a response.

Trends in PWD Keeping the Public Informed

For each of the following statements, please check one circle to indicate how much you agree or disagree: Keeps the public informed



While trends remain very favorable with very little negative feedback, results are attenuated over the last two measurements by sizable blocs of customers who aren't providing an opinion.

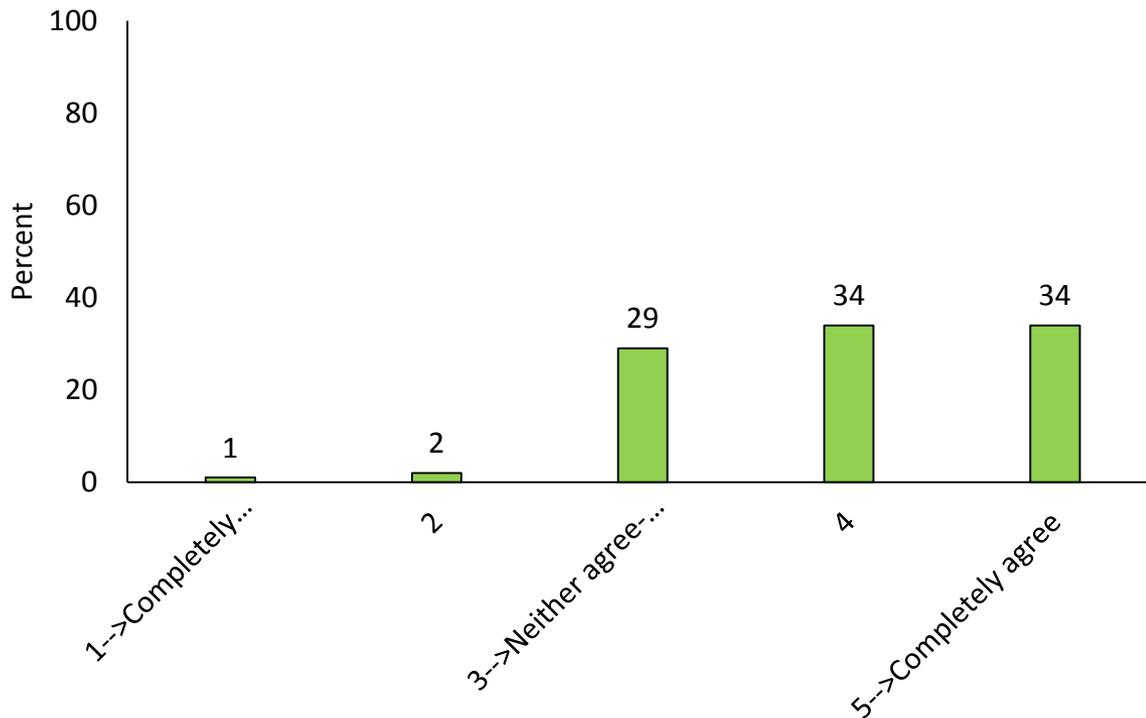
After a period of favorable results from 2000 to 2008 all exceeding 8-in-10 customers agreeing that PWD keeps the public informed, as the proportion of uncertain customers has risen in recent years, the number of those ascribing favorable scores has dropped.

Still, among those rendering an opinion, results are exceeding favorable.

Agreement that PWD Cares About the Environment

Question 9F: For each of the following statements, please check one circle to indicate how much you agree or disagree:

Cares about the environment

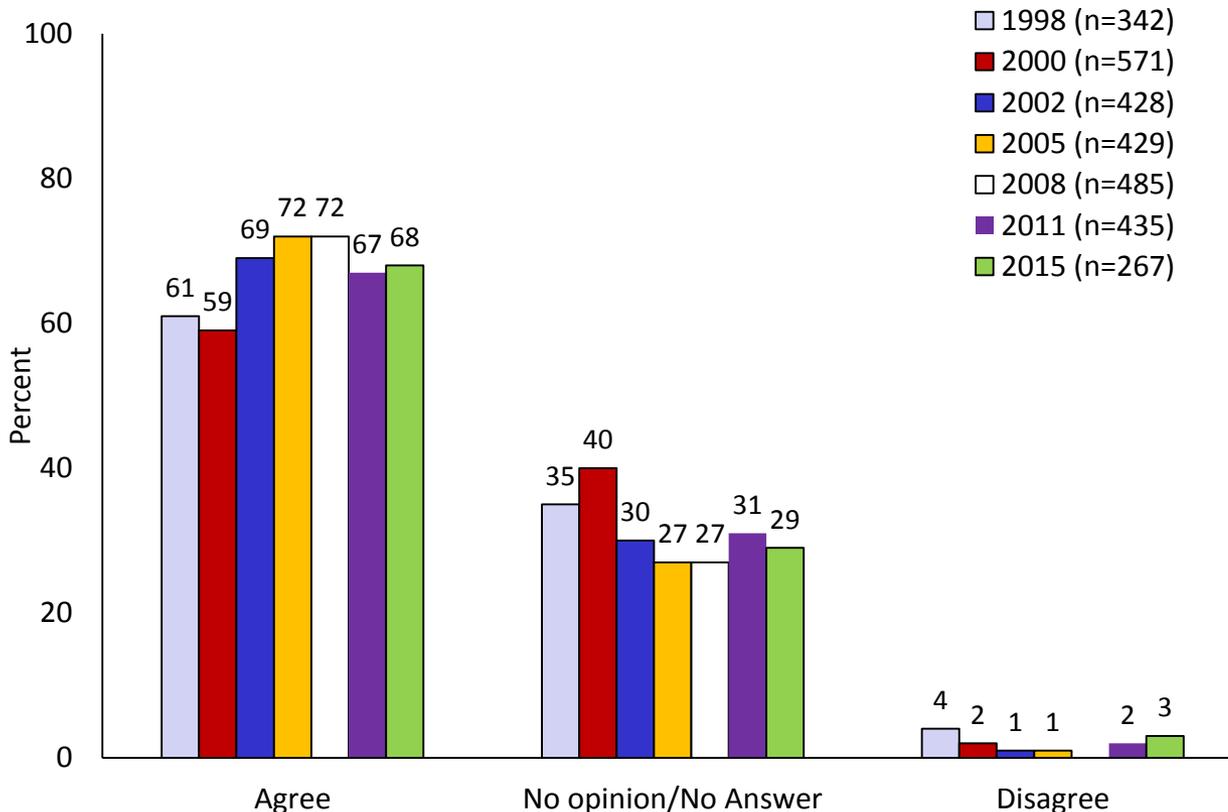


Almost 7-in-10 respondents (68%) agree that PWD cares about the environment and very few (3%) disagree.

The remaining of survey respondents (29%) either selected “Neither agree nor disagree” or did not offer a response.

Trends in PWD Being Seen as Caring About the Environment

For each of the following statements, please check one circle to indicate how much you agree or disagree: Cares about the environment



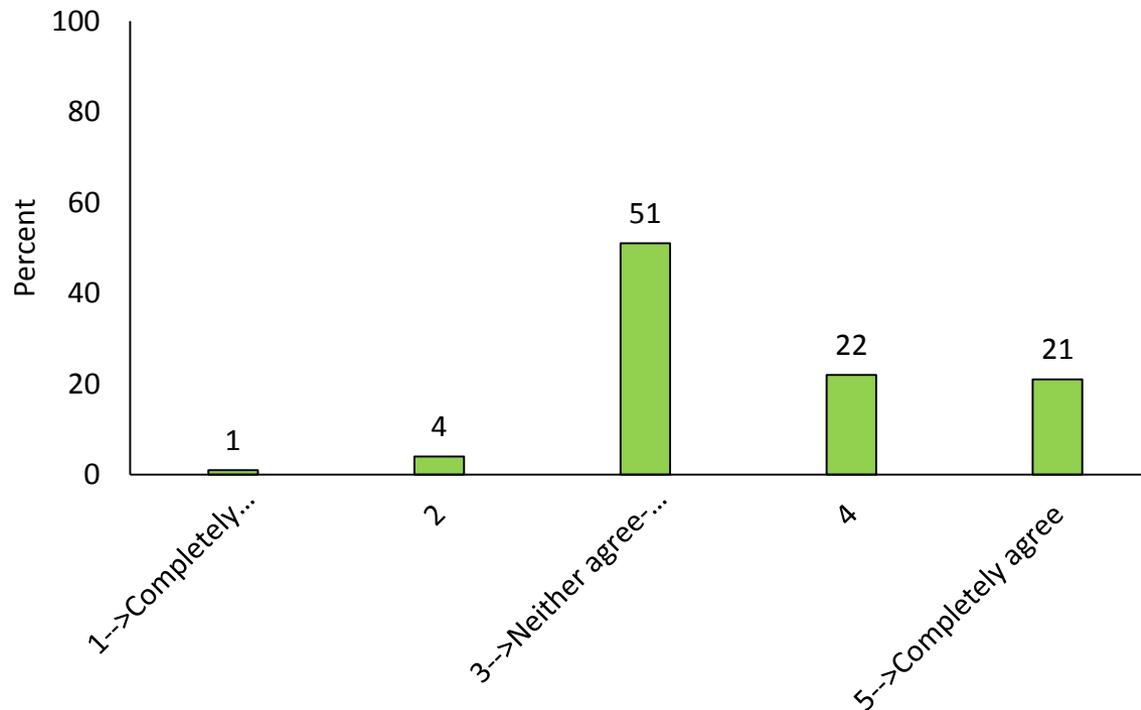
Trends in the perception of the Water District as an organization that cares about the environment have remained relatively stable since 2002, with very little negative reaction over that same time period.

Over this time period, roughly 7-in-10 customers has been in agreement that PWD cares about the environment.

Agreement that PWD is Active in the Community

Question 9G: For each of the following statements, please check one circle to indicate how much you agree or disagree:

Is active in the community

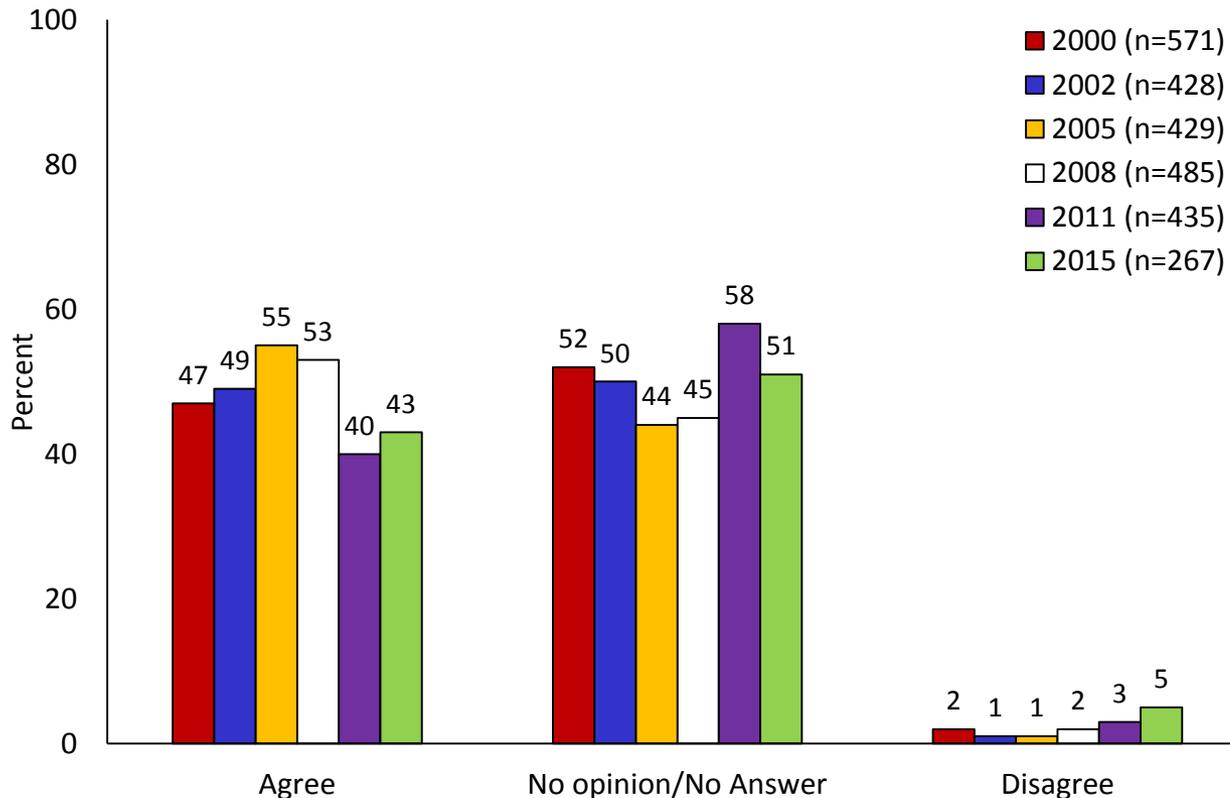


43% of respondents agree that PWD is active in the community and few (5%) disagree.

Importantly, a sizable bloc of customers (51%) likely do not know enough to venture an assessment about the organization's community involvement and selected "Neither agree nor disagree" or didn't respond to the item.

Trends in PWD Being Active in the Community

For each of the following statements, please check one circle to indicate how much you agree or disagree: Is active in the community



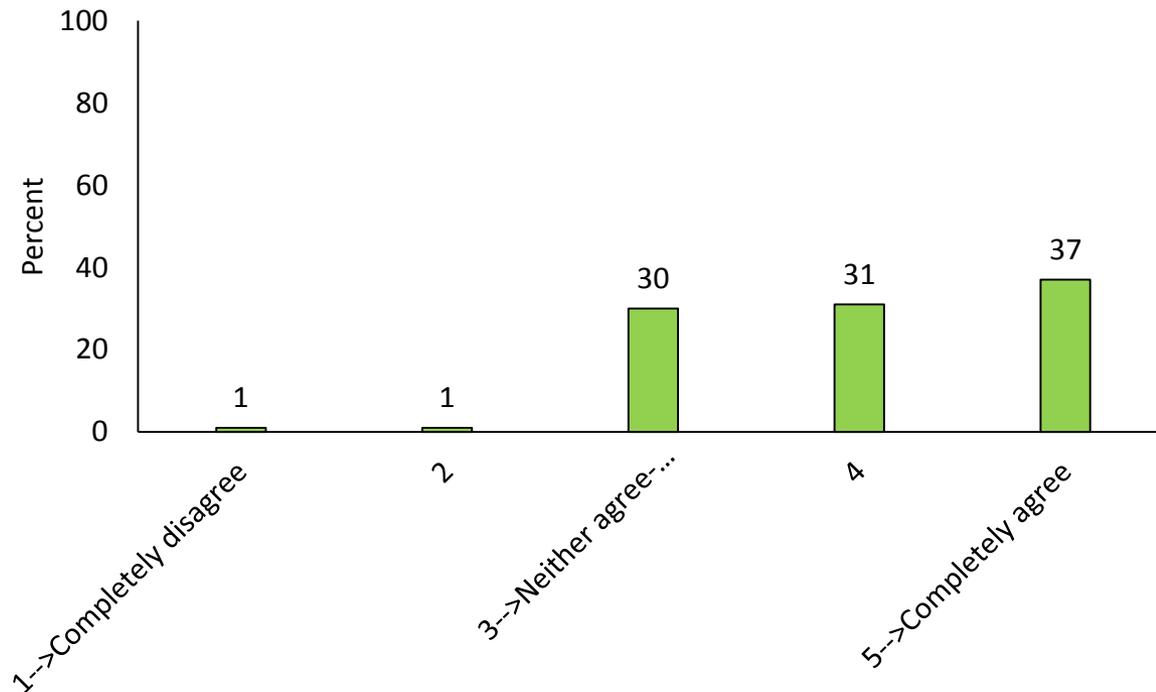
Dating back to 2000, sizable blocs of customers have been uncertain about PWD's community involvement and thus haven't really been able to offer an opinion.

Those who are rating the organization, however, continue to be very favorable in their assessment, while offering very little negative feedback.

Agreement that PWD is Experienced and Knowledgeable

Question 9H: For each of the following statements, please check one circle to indicate how much you agree or disagree:

Is experienced and knowledgeable

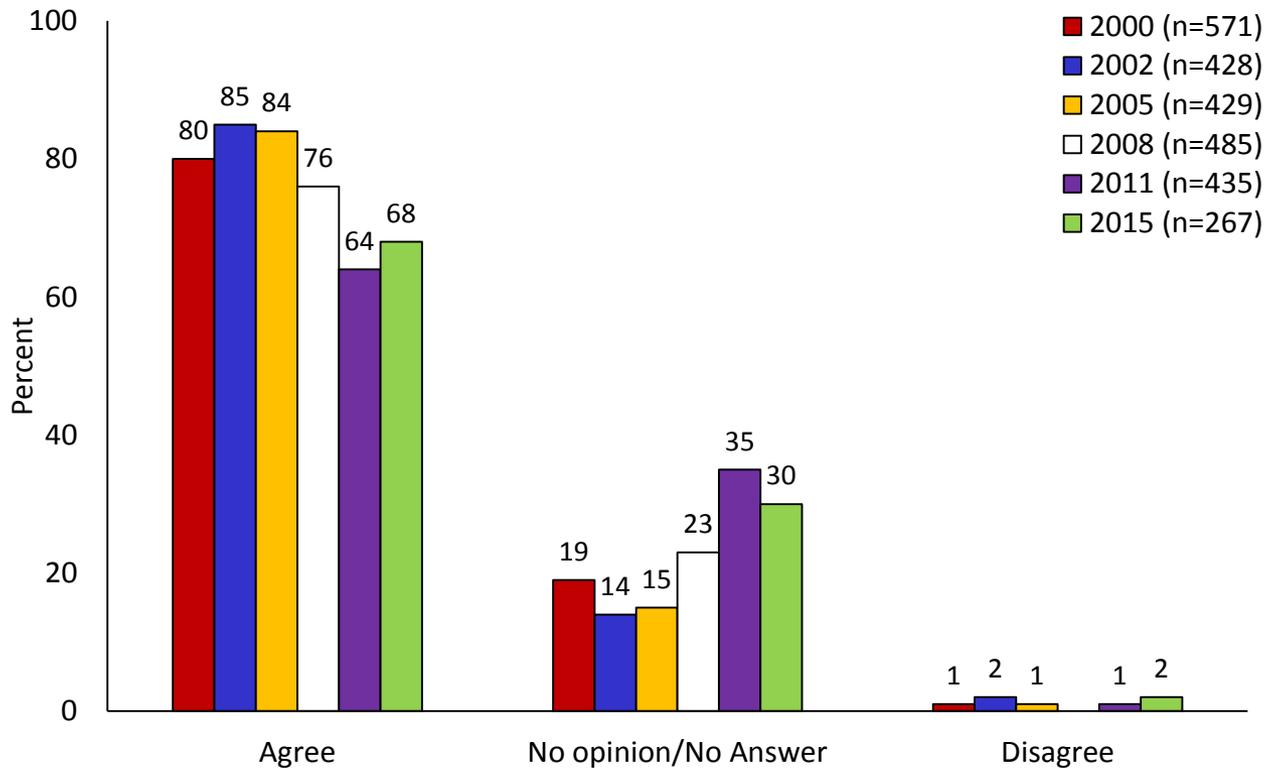


Seven-in-ten survey respondents (68%) agree that the Water District is experienced and knowledgeable and very few (2%) disagree.

The remaining 30% of respondents “Neither agree nor disagree” or declined to answer, likely an indication of lacking enough awareness to venture an assessment.

Trends in PWD Being Seen as Experienced and Knowledgeable

For each of the following statements, please check one circle to indicate how much you agree or disagree: Is experienced and knowledgeable



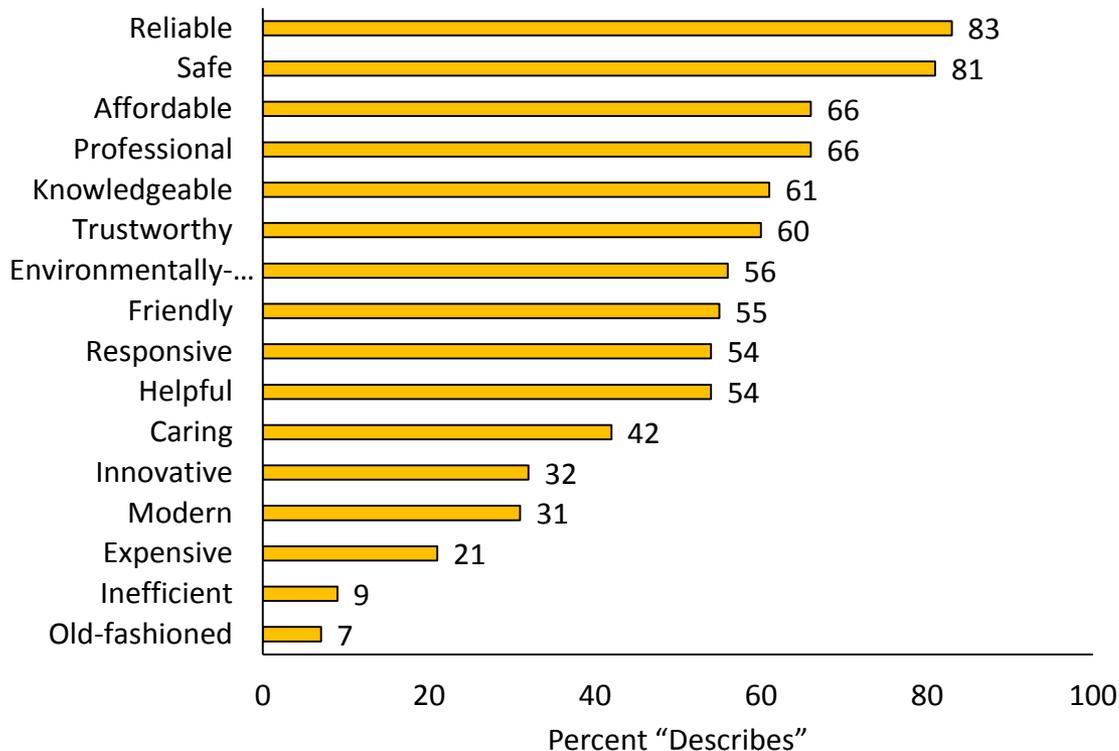
Trends in the perception of the Water District as an experienced and knowledgeable organization have essentially stabilized after a period in which the proportion of customers able to offer an assessment dropped appreciably.

While negative feedback remains extremely limited, it is still noteworthy that 3-in-10 customers aren't able or willing to offer an opinion.

Summary Perspectives on Attributes of PWD

Please check circles below to indicate which of the listed characteristics shown either describe or do not describe the Portland Water District and its services.

Sourced from Question 10A through 10P.



The top tier of attributes for PWD is made up of cost-of-entry expectations: *safe* and *reliable*.

The next tier of descriptives includes being *professional*, *knowledgeable*, and *trustworthy*.

Importantly, fully two-thirds of respondents (66%) say *affordable* describes PWD and only 21% would characterize it as *expensive*.

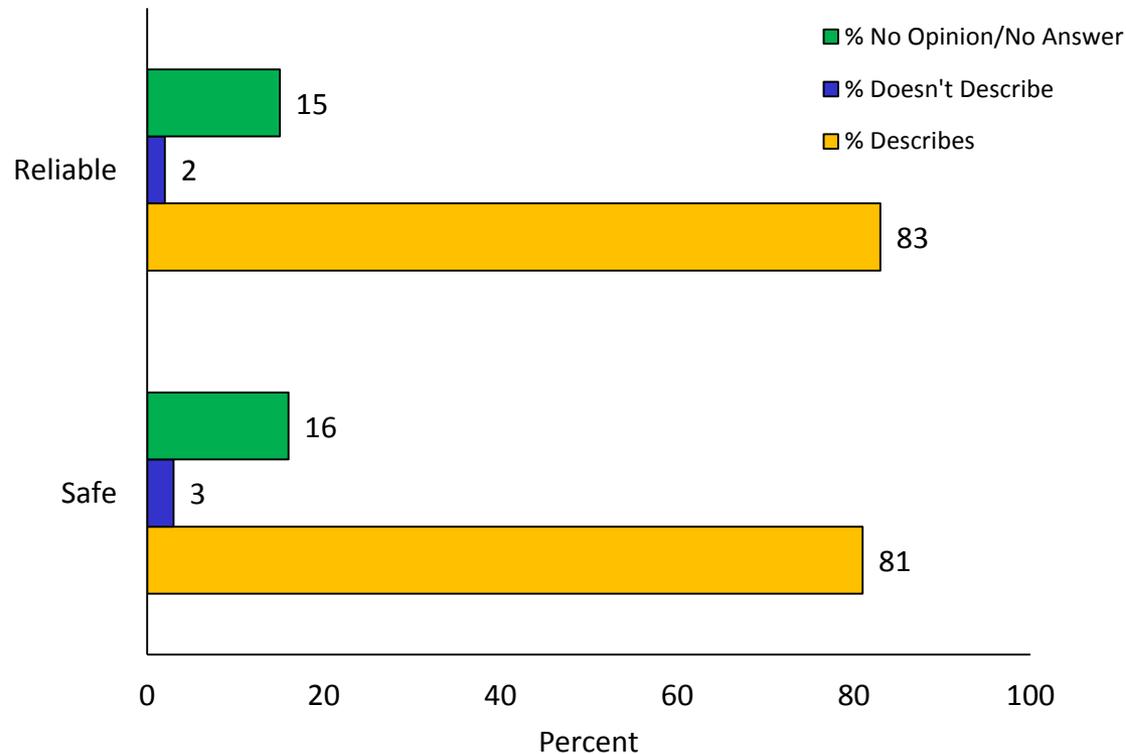
Interestingly, while just 7% see PWD as *old-fashioned*, only 31% see the organization as *modern*.

See the following pages for detail on each of the individual attributes tested.

Perspectives on Attributes of PWD

Please check circles below to indicate which of the listed characteristics shown either describe or do not describe the Portland Water District and its services.

Sourced from Question 10G and 10H.

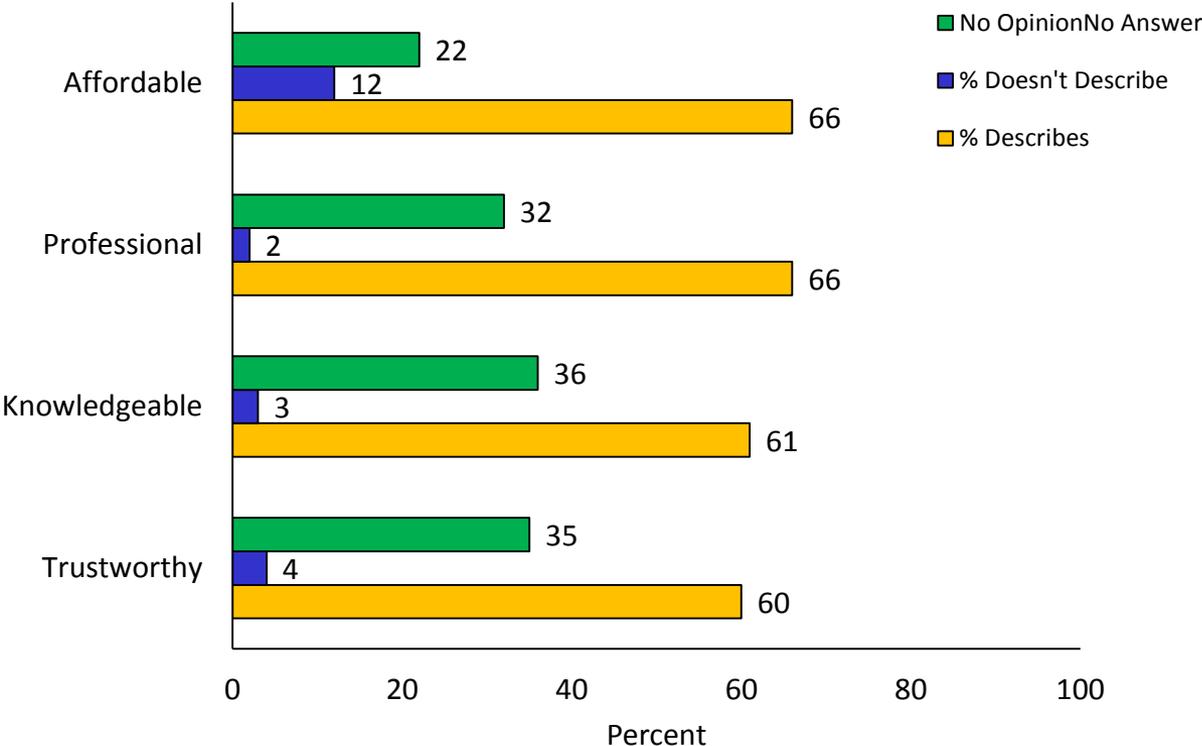


Very few customers believe *safe* and *reliable* do not describe PWD.

Perspectives on Attributes of PWD

Please check circles below to indicate which of the listed characteristics shown either describe or do not describe the Portland Water District and its services.

Sourced from Question 10A, 10C, 10D, and 10J.

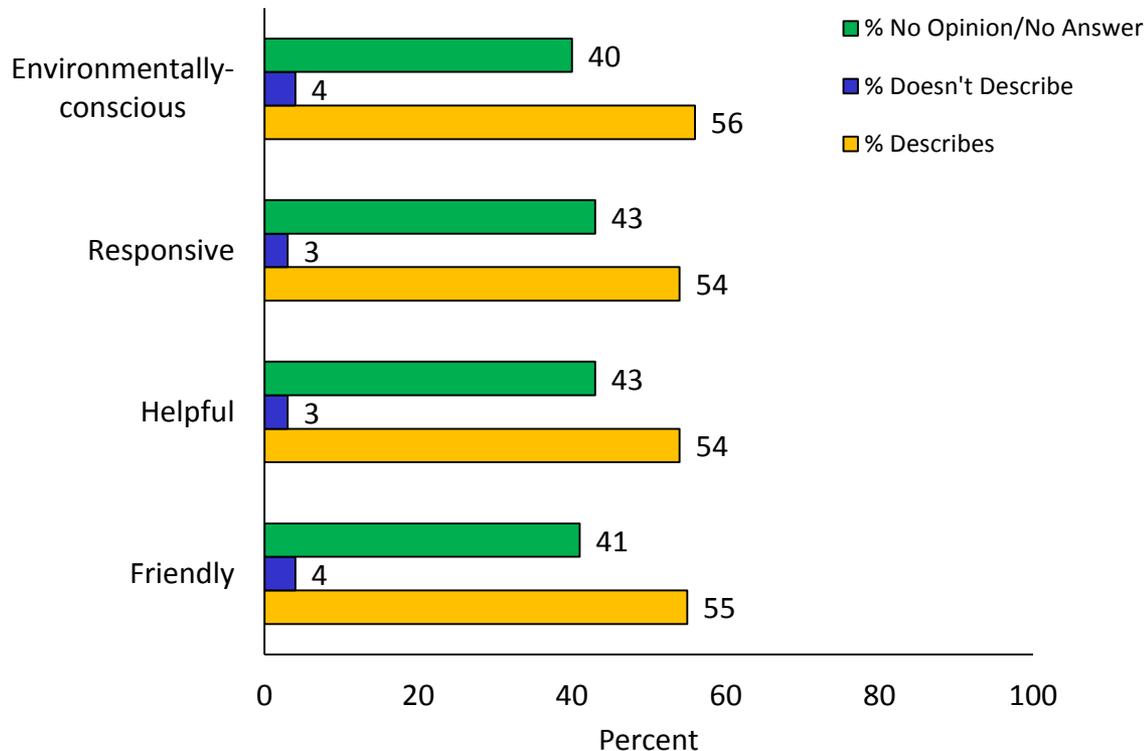


In terms of these positive attributes, *affordable* generated the largest proportion of customers who do not feel it describes PWD, but still at only 13%; meanwhile, fully 69% feel *affordable* describes PWD.

Perspectives on Attributes of PWD

Please check circles below to indicate which of the listed characteristics shown either describe or do not describe the Portland Water District and its services.

Sourced from Question 10B, 10K, 10L, and 10N.

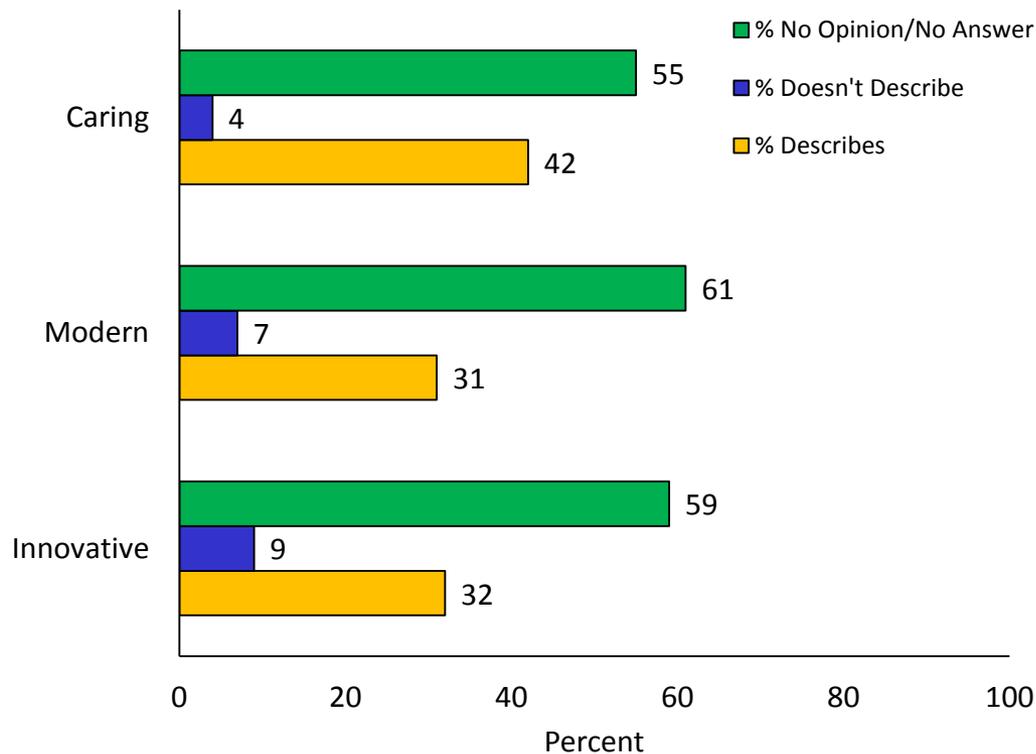


A majority of customers believe PWD possesses these favorable attributes and very few feel the organization is not characterized by these attributes.

Perspectives on Attributes of PWD

Please check circles below to indicate which of the listed characteristics shown either describe or do not describe the Portland Water District and its services.

Sourced from Question 10E, 10M, and 10P.



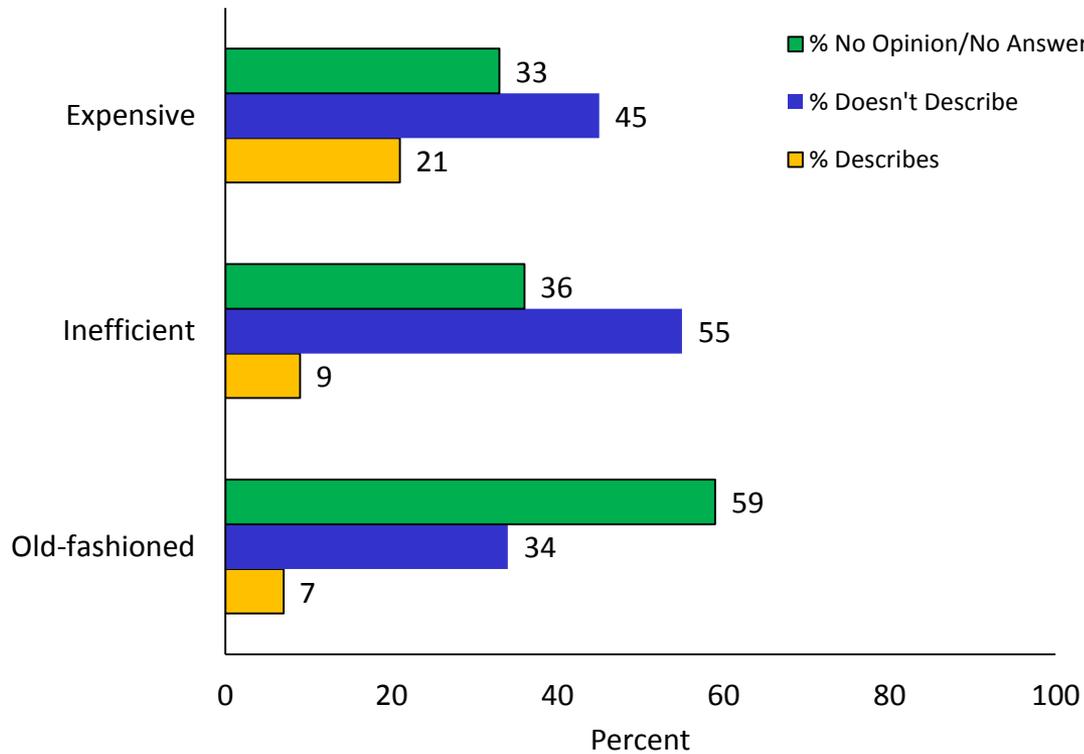
Roughly one-third (or more) of customers believe PWD is *caring*, *modern*, and *innovative*, respectively.

While a majority of customers cannot offer an opinion, comparatively few disagree and believe the organization lacks these attributes.

Perspectives on Attributes of PWD

Please check circles below to indicate which of the listed characteristics shown either describe or do not describe the Portland Water District and its services.

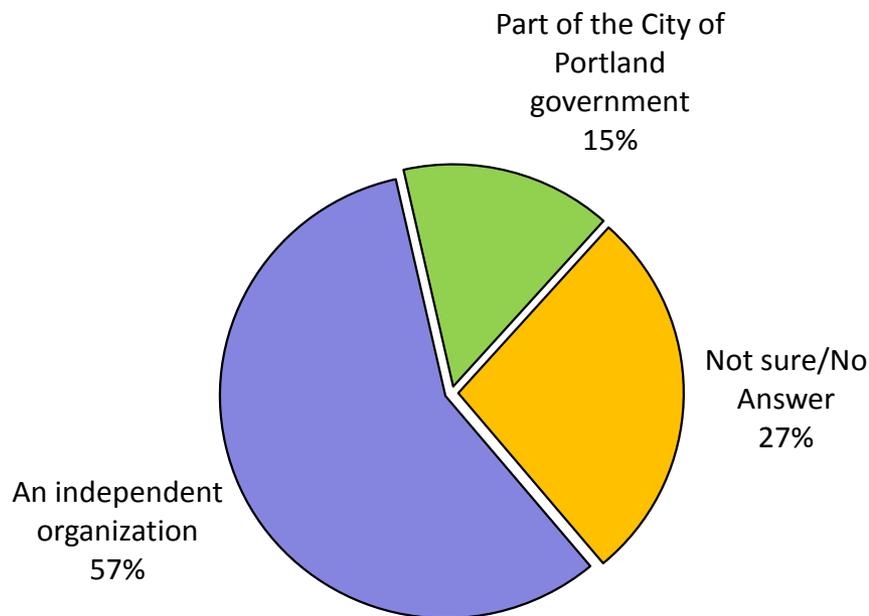
Sourced from Question 10F, 10I, and 10O.



Importantly, while sizable blocs of customers do not have an opinion in these negative areas, it is notable that more customers feel these attributes (*expensive, inefficient, and old-fashioned*) do not describe the Water District than believe describes the organization.

Perspectives on PWD Governance

Question 11: As you understand it, is the Portland Water District an independent organization or part of the City of Portland government?



A majority of those surveyed (57%) correctly noted that the Water District is an independent organization.

However, 15% incorrectly thought the organization is part of the government of the City of Portland and another 27% claim to not know or did not offer a response.

In examining different customer subgroups, men (65%) and those in the 55-69 age band (69%) are most likely to be aware of PWD's status as an independent organization.

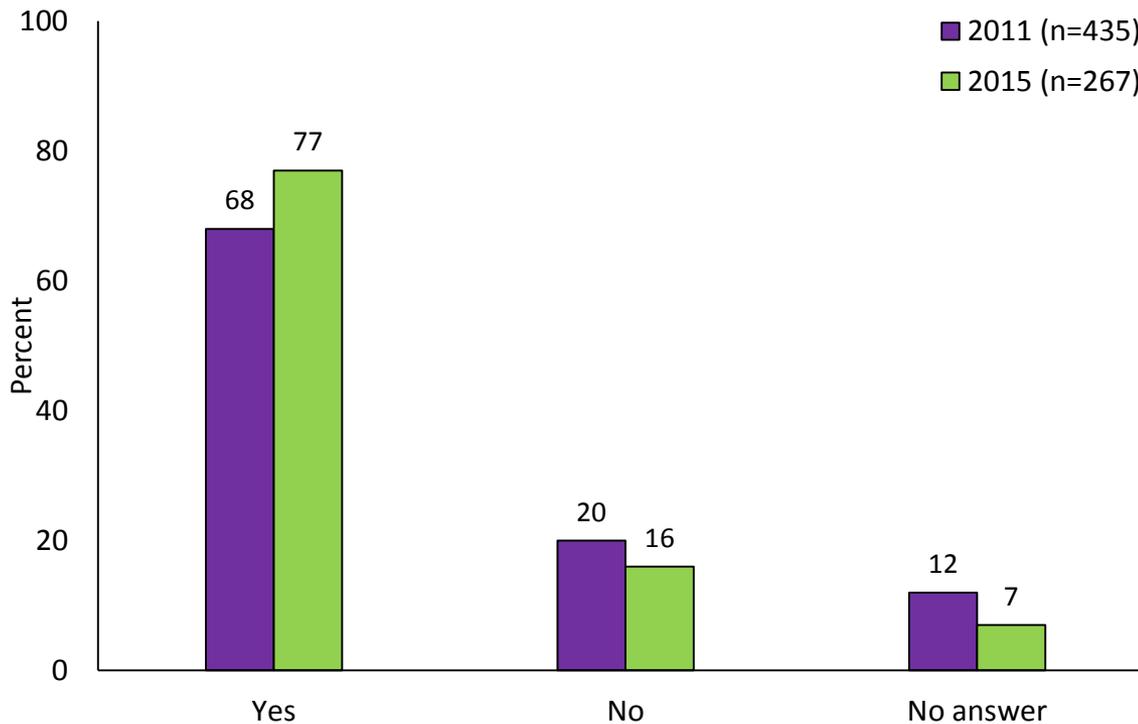
Meanwhile, women (27%) and those in the 25-34 (50%) and 35-54 (26%) age bands are most likely to specifically say that they don't know or not respond.

***Awareness and Usage of
PWD Service Options***

Trends in Awareness of Paperless Bills in Email Notice

Question 12A: Are you aware that the Portland Water District offers the following customer service options?

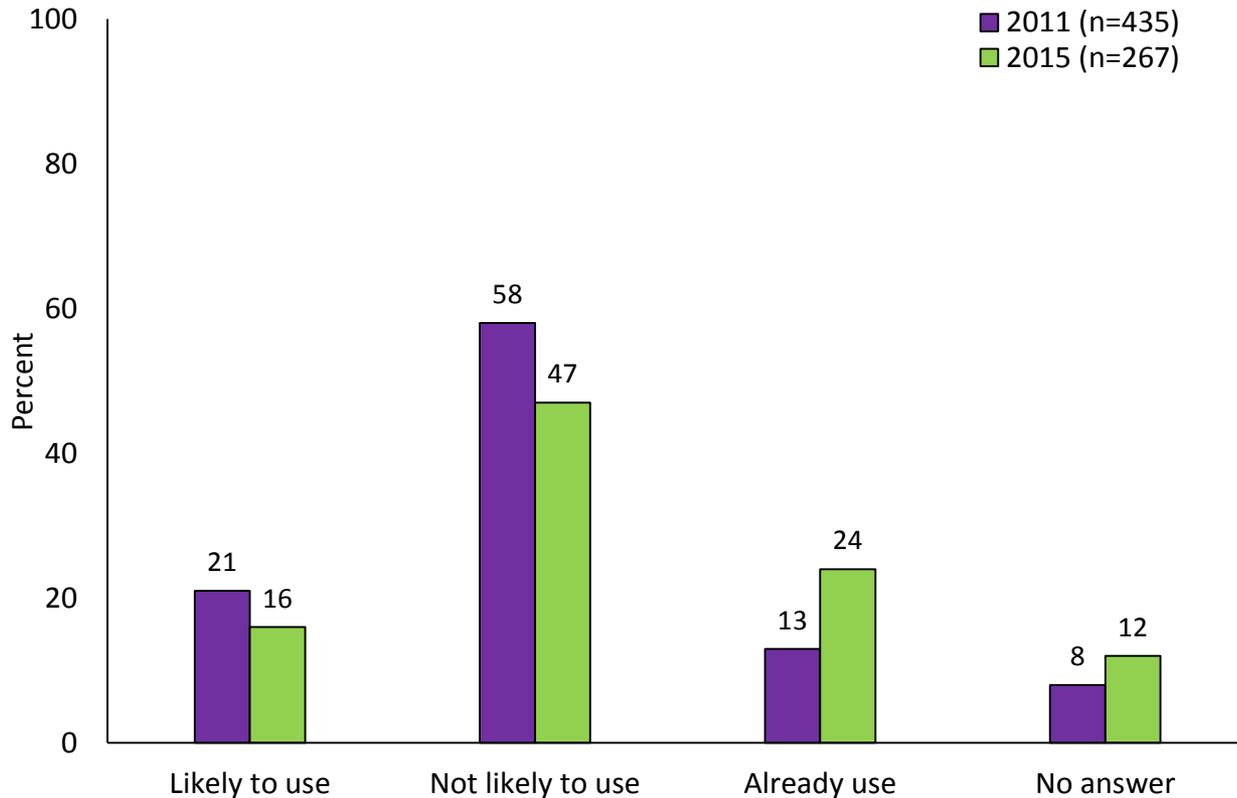
Paperless bills with e-mail notice



Awareness of the paperless bill offering from PWD has grown directionally since 2011.

Trends in Usage: Paperless Bills

Question 12A: And are you likely to use them?
Paperless bills with e-mail notice



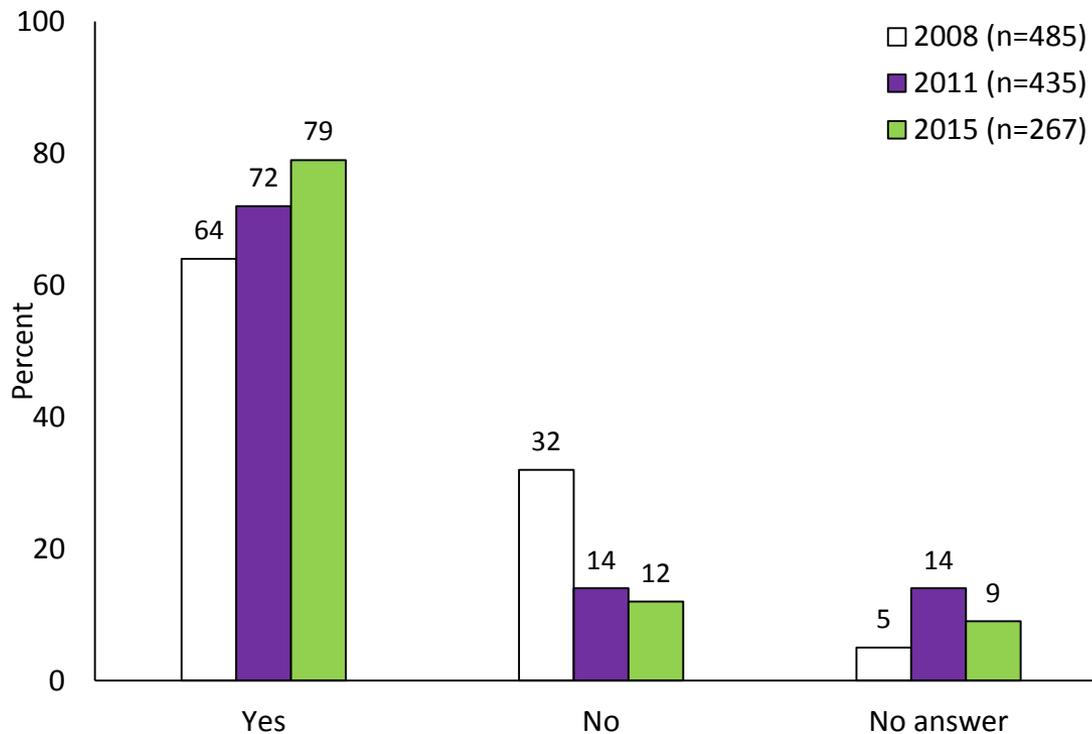
Activity surrounding paperless billing has grown since 2011, as reported usage has roughly doubled since the 2011 measurement.

Reported usage claims (both current and potential) are highest with the youngest segment of customers (age 25-34) and decline with age.

Trends in Awareness of Online Bill Payment

Question 12B: Are you aware that the Portland Water District offers the following customer service options?

Online bill payment

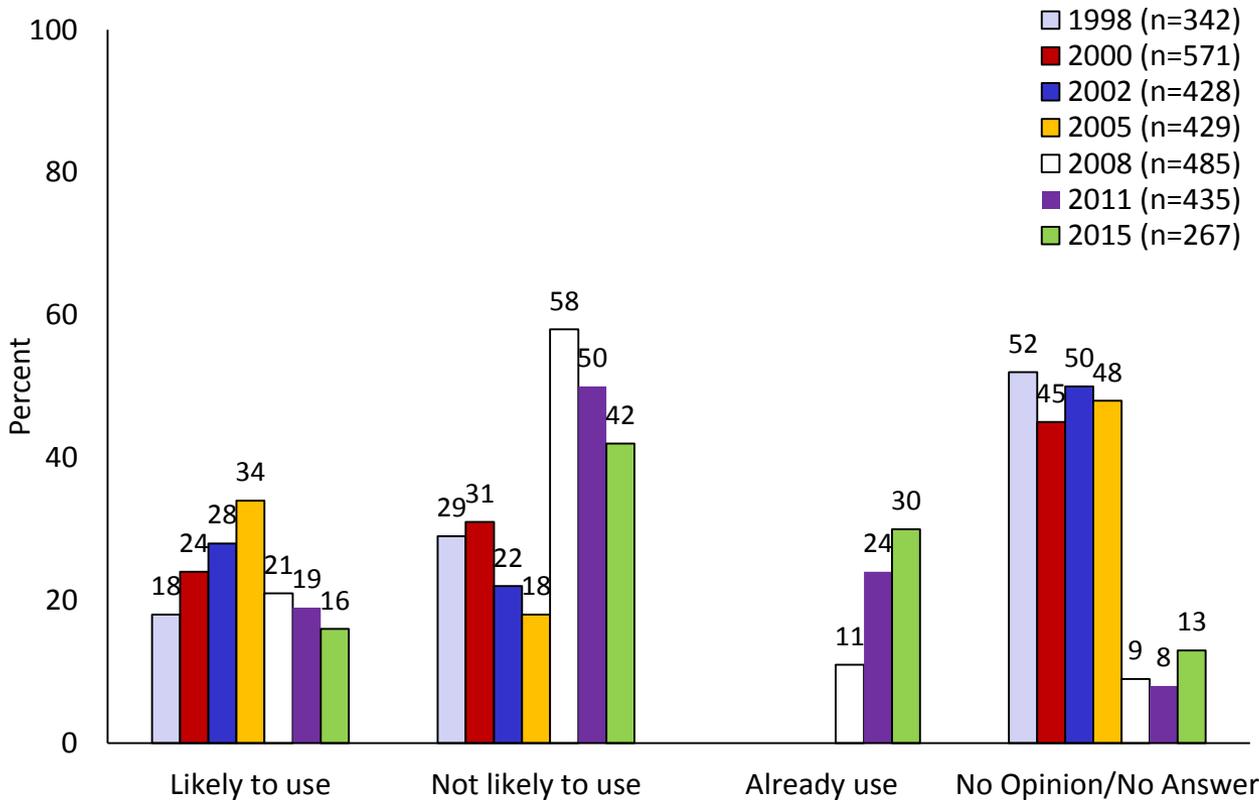


Awareness of the ability to pay online has grown since measurement of the feature began in 2008.

As with paperless billing, awareness of online billing is highest with the youngest customer segment and generally declines with age.

Trends in Usage: Online Bill Payment

Question 12B: And are you likely to use them? *
Online bill payment



Activity surrounding online billing is continuing to grow since the item was first included on the 2008 survey.

Reported usage of online billing has roughly tripled since the 2008 measurement.

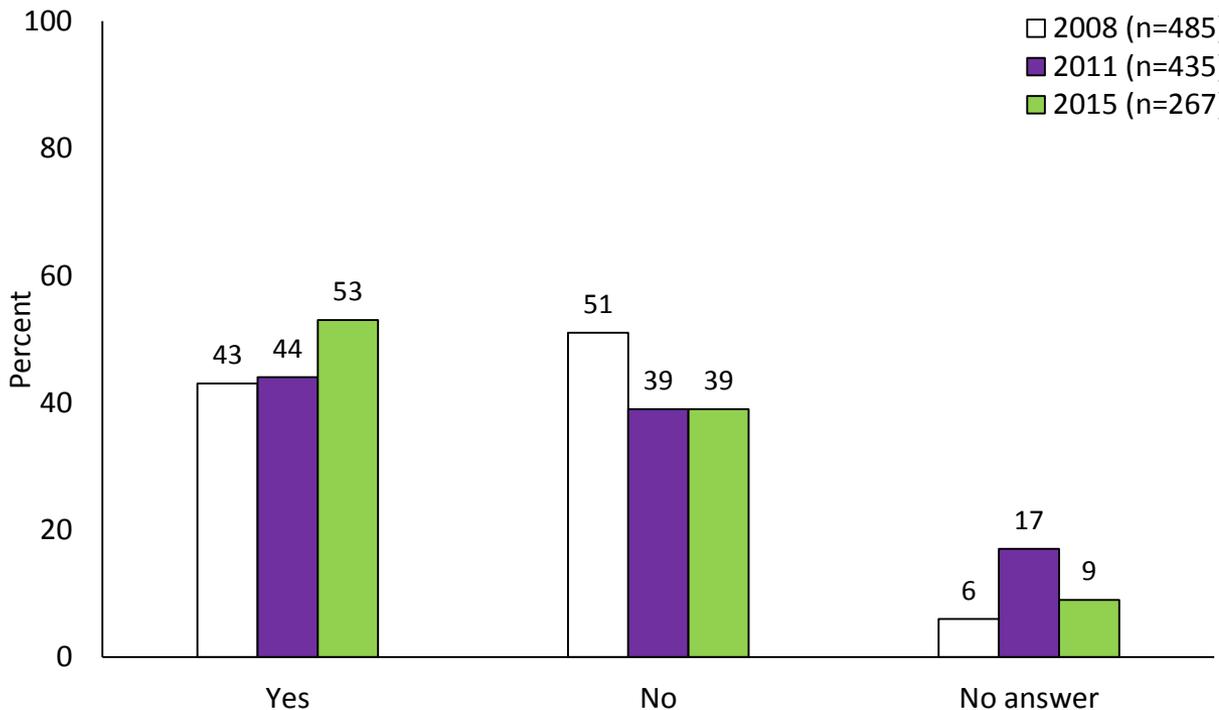
As with other service measures, usage is highest with the youngest segment of 25-34 year-olds (58%) and declines with age.

* In measurements prior to 2008, the question wording was focused on interest in potential usage and response options did not include an option for current/existing usage.

Trends in Awareness of Automated Account Information via Phone

Question 12C: Are you aware that the Portland Water District offers the following customer service options?

Automated account information by telephone

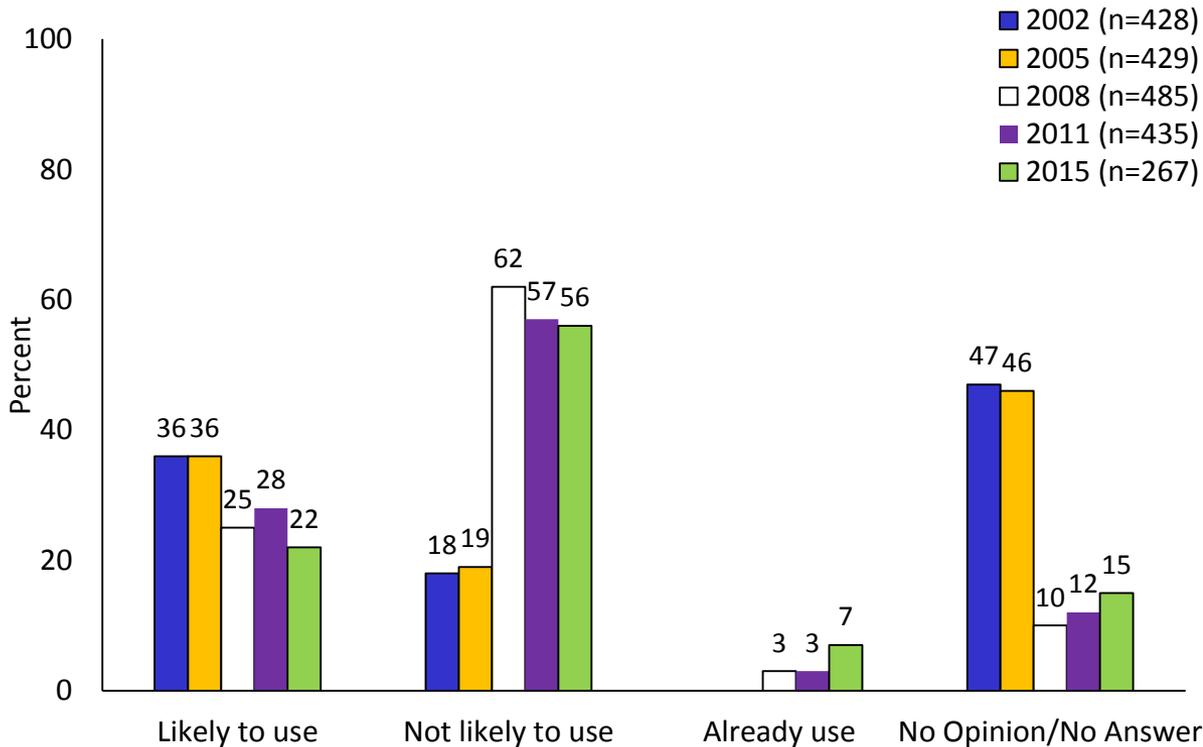


Awareness of the ability to get account information via phone has grown since 2011.

The current figure of 53% represents a directional change relative to the past two measurements.

Trends in Usage: Automated Account Information

Question 12C: And are you likely to use them? *
Automated account information by telephone



Activity surrounding checking account information via phone continues to be limited.

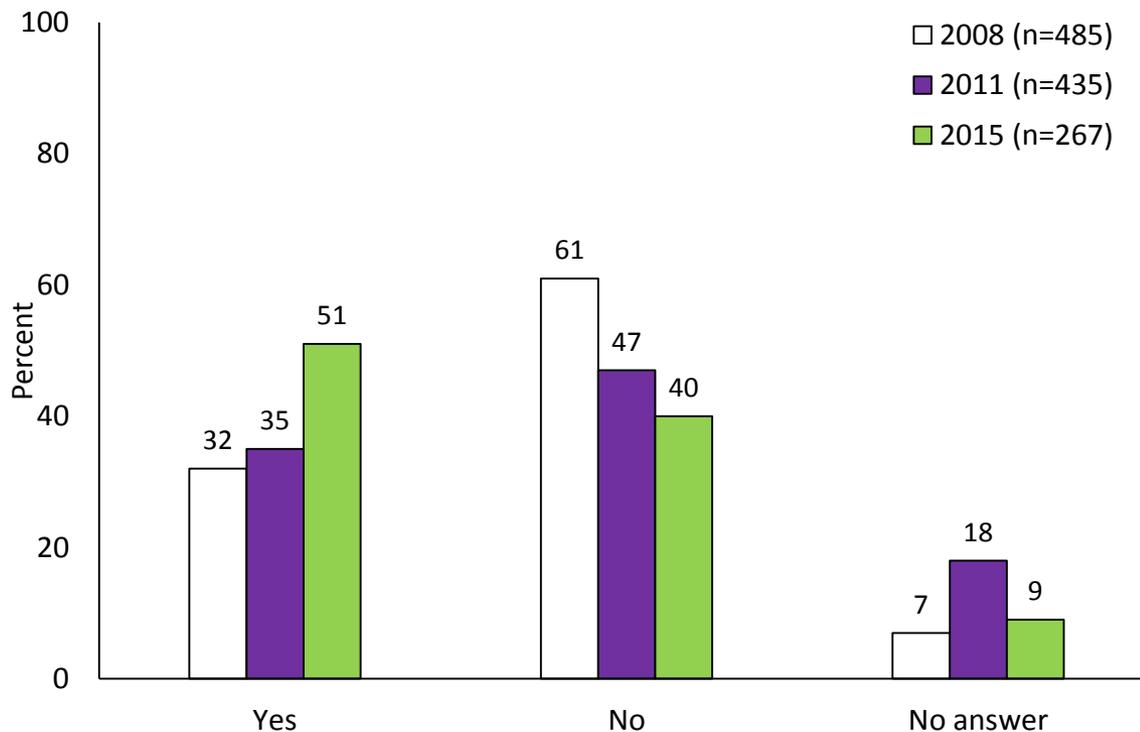
Reported usage of this service has roughly doubled, though usage remains limited at just 7% of customers polled.

* In measurements prior to 2008, the question wording was focused on interest in potential usage and response options did not include an option for current/existing usage.

Trends in Awareness of Online Change of Name/Address

Question 12D: Are you aware that the Portland Water District offers the following customer service options?

Online change of name and address forms

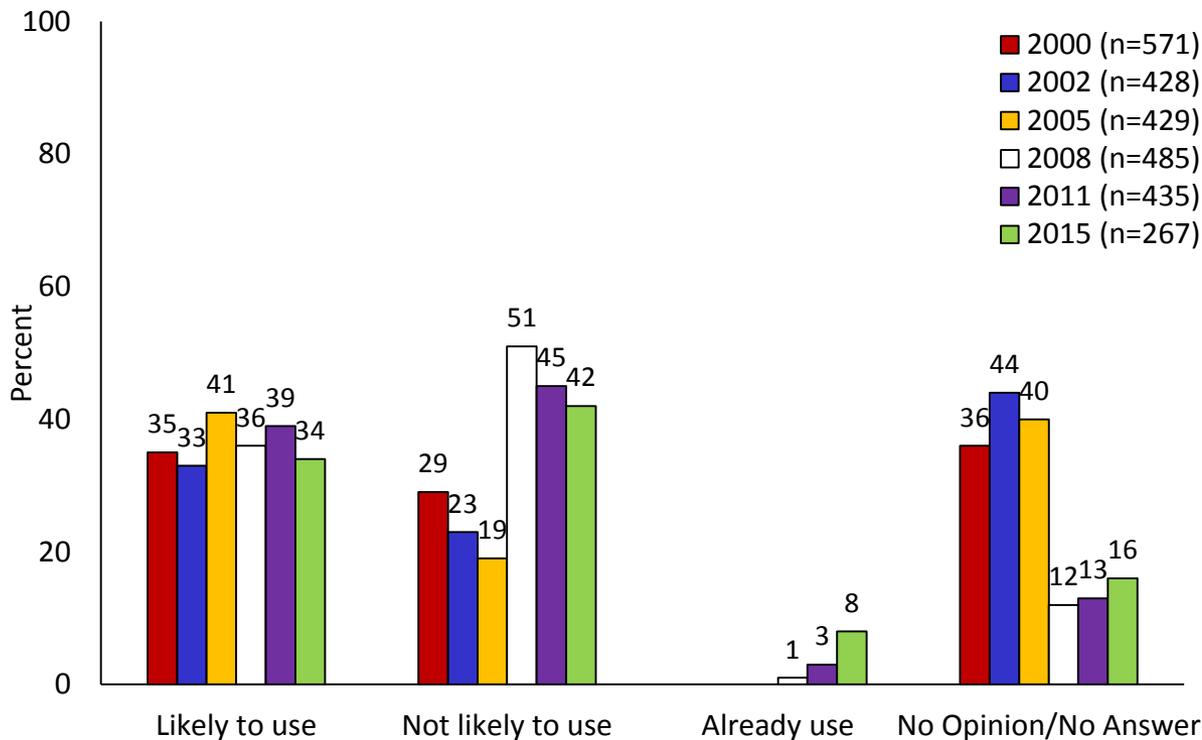


Reported awareness of online tools to change billing name/address has grown substantially since 2011.

Currently at 51%, awareness has risen by roughly 50% since 2011.

Trends in Usage: Online Change of Name/Address

Question 12D: And are you likely to use them? *
Online change of name and address forms



Usage remains limited since the item was first included on the 2008 survey.

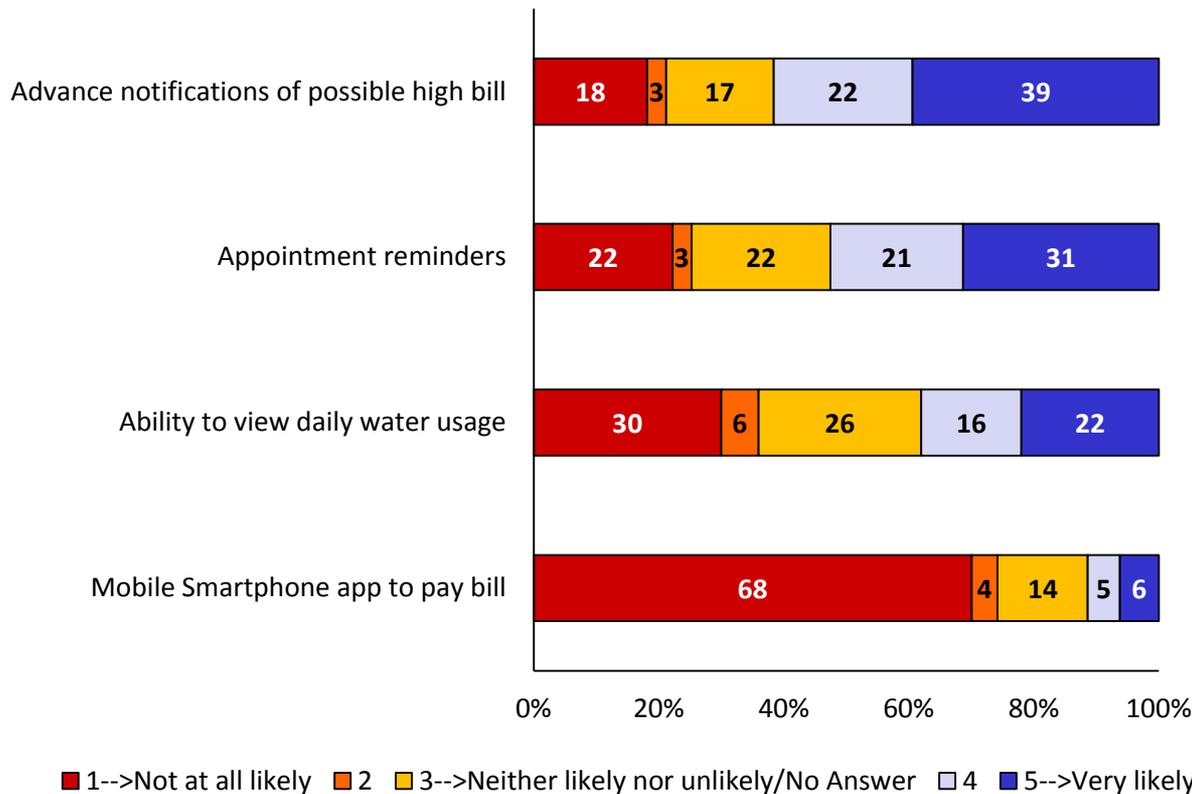
Reported usage of online change of address tools has doubled since the most recent measurement, though usage does remain limited at 8%.

* In measurements prior to 2008, the question wording was focused on interest in potential usage and response options did not include an option for current/existing usage.

Likelihood of Usage for Potential Service Options

How likely would you be to use each of the following customer service options, if the Portland Water District made such options available?

Sourced from Question 13A through 13D.



The options showing the greatest level of reported usage include advance notices of a possible high bill (39% are “very likely” to use) and appointment reminders (31%).

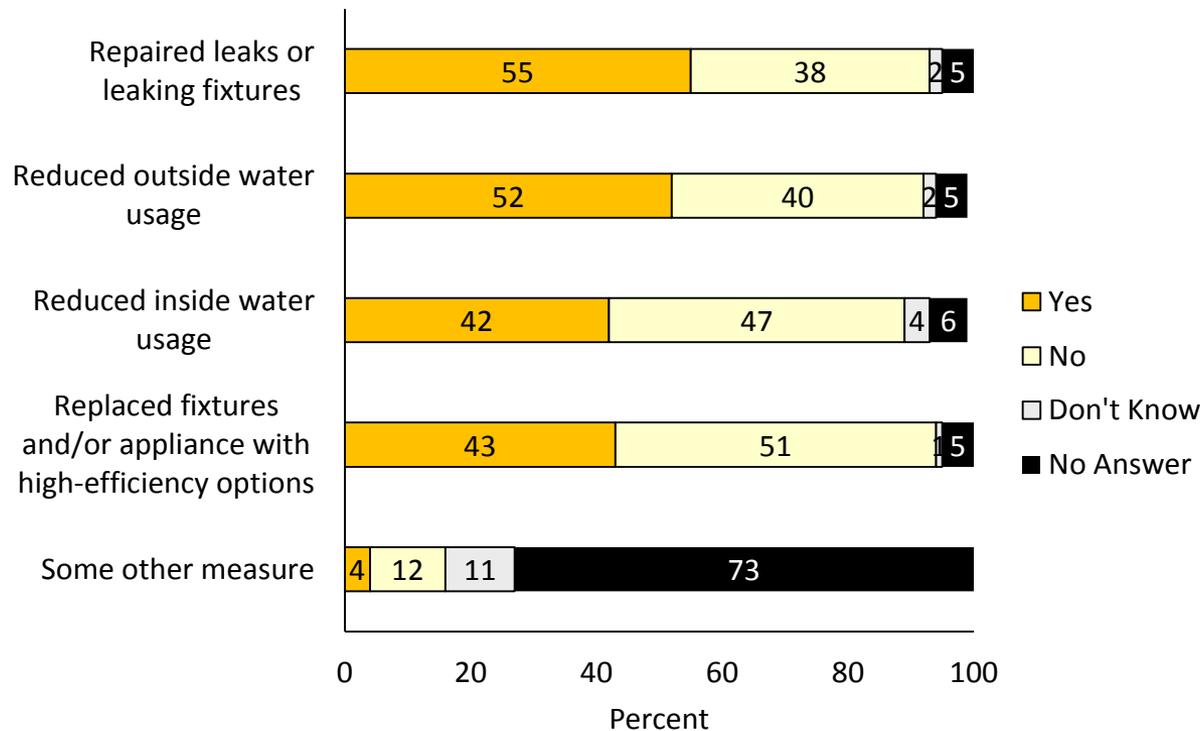
Just 2-in-10 customers (22%) would be “Very likely” to access daily water usage information, an option of greater interest to women (27%), younger residents age 25-34 (50%), and those with paperless billing (34%).

Similarly, while stated likelihood of use for the possible Smartphone app was very limited, interest was slightly greater among younger customers age 25-34 (17%) and 35-54 (15%); interest is minimal among older customers.

Activity Around Water Usage Reduction

In the past year, have you taken any of the following measures to reduce your water usage?

Sourced from Question 18A through 18E.



A sizable proportion of PWD customers report having taken part in the tested water conservation activities.

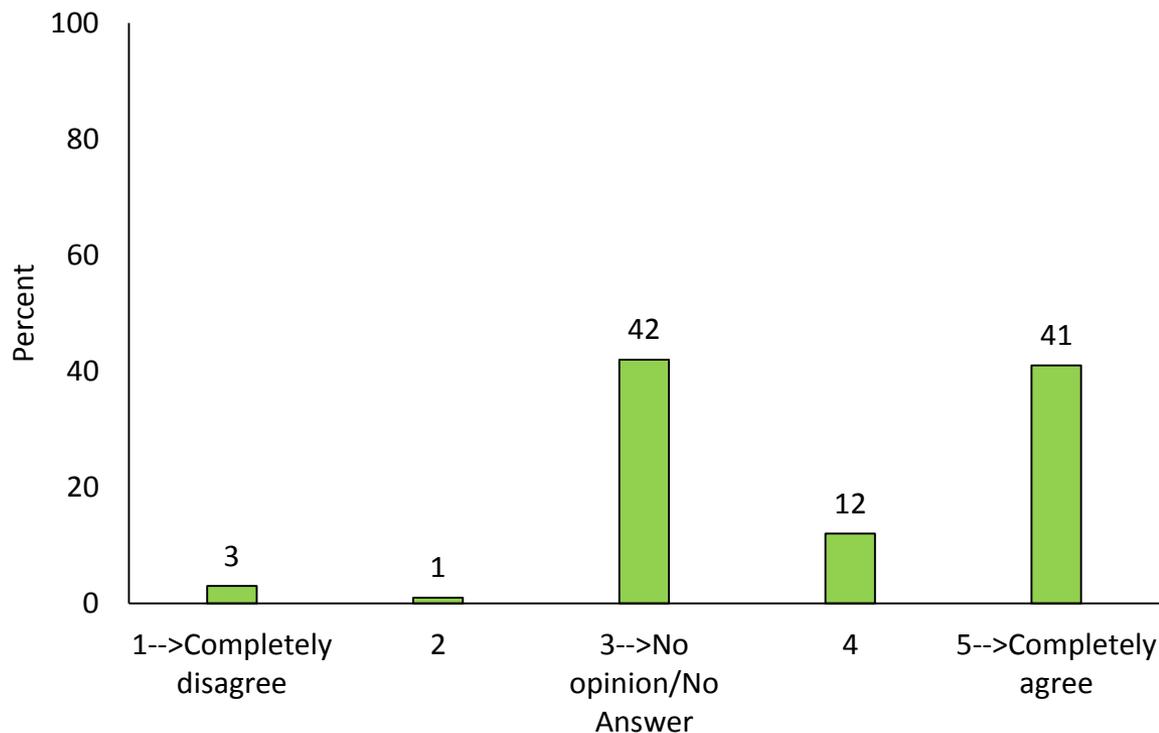
Interestingly, those with paperless billing are less likely than their counterparts to report having taken part in these conservation activities.

Dimensions of Customer Service

Agreement that PWD Lets Customer Know About Shut-Offs

Question 14A: For each of the following, please check one circle to indicate how much you agree or disagree with the given statement:

Lets customers know in advance if the water has to be shut off

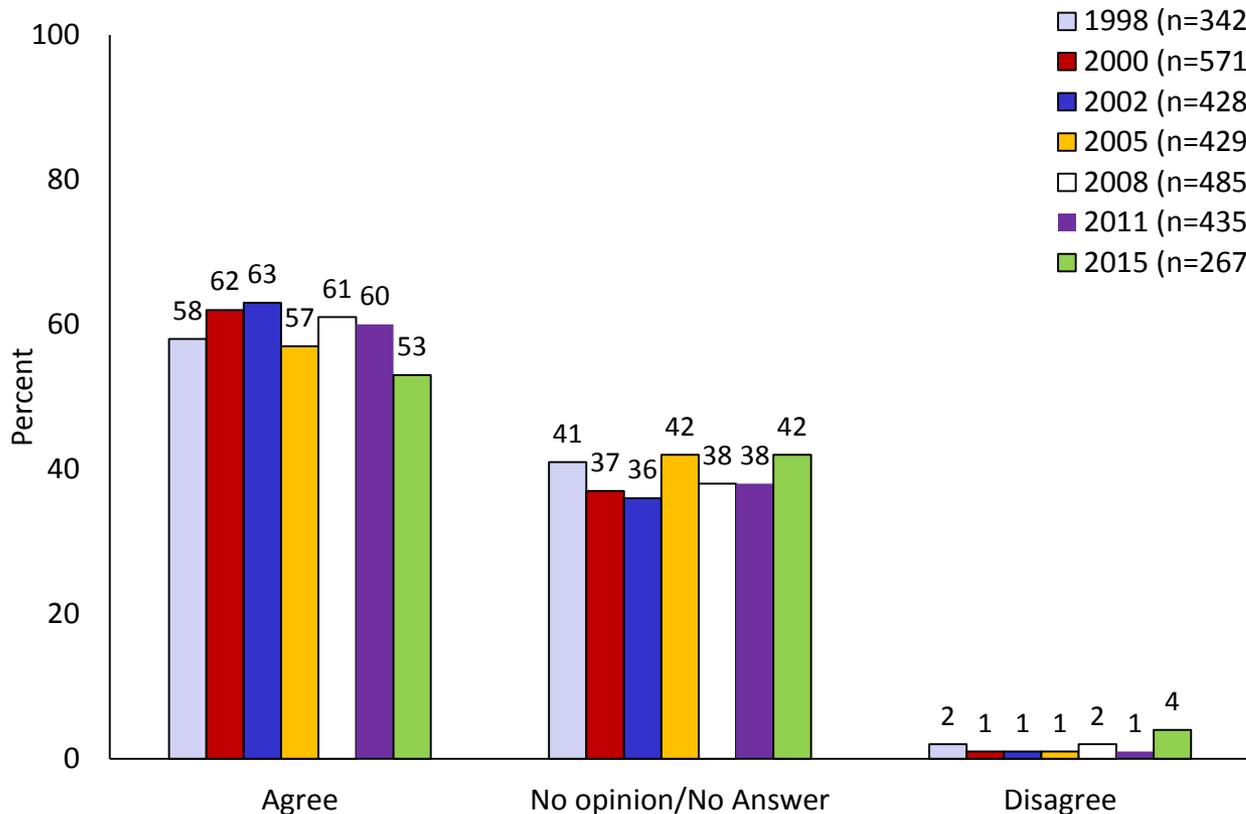


A majority of customers agree that the Water District lets customers know ahead of time if the water needs to be shut off (53%) and few (5%) disagree.

Fully 42% of customers likely have no experience in this area and thus stated that they have no opinion or did not choose to respond.

Trends in PWD Being Seen as Letting Customer Know About Shut-Offs

For each of the following, please check one circle to indicate how much you agree or disagree with the given statement: Lets customers know in advance if the water has to be shut off



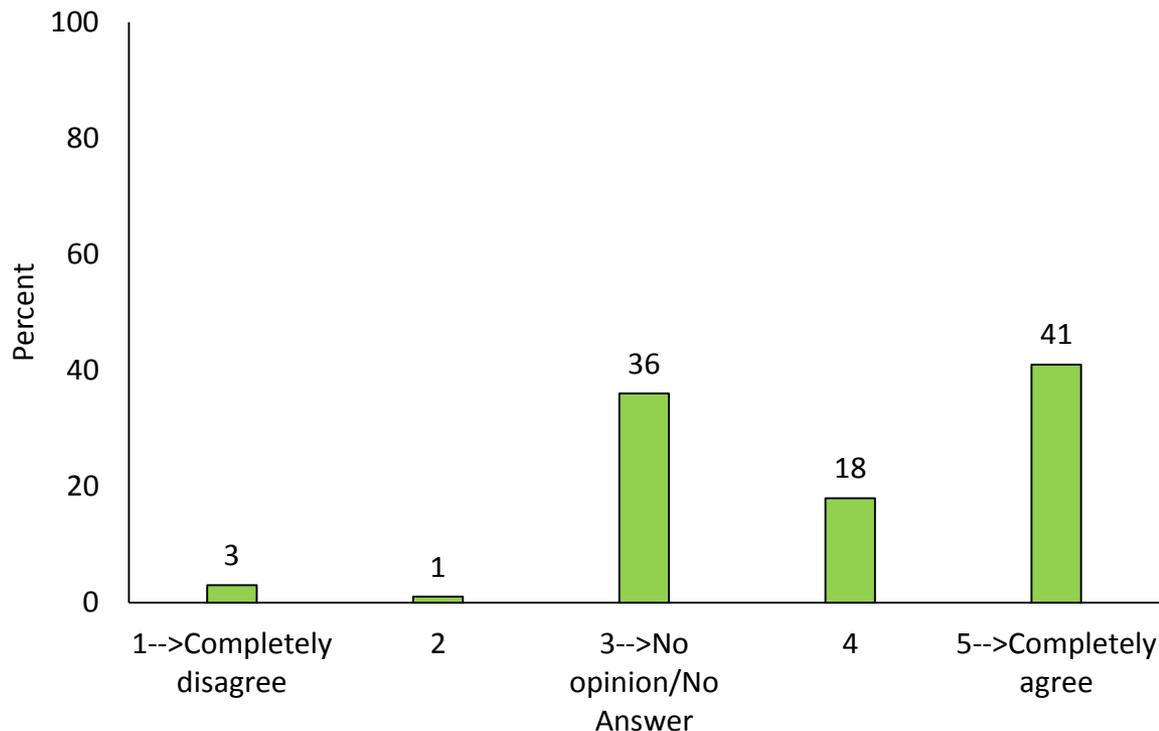
Generally, agreement that PWD lets customers know about necessary shut-offs has trended similarly dating back to 1998, with roughly half (or more) agreeing that PWD gives customers advance notice of such needs.

Very few overtly disagree, with most of the remaining customers claiming to not have opinion or choosing not to answer.

Agreement that PWD Responds Quickly to Emergencies

Question 14B: For each of the following, please check one circle to indicate how much you agree or disagree with the given statement:

Responds quickly to emergencies

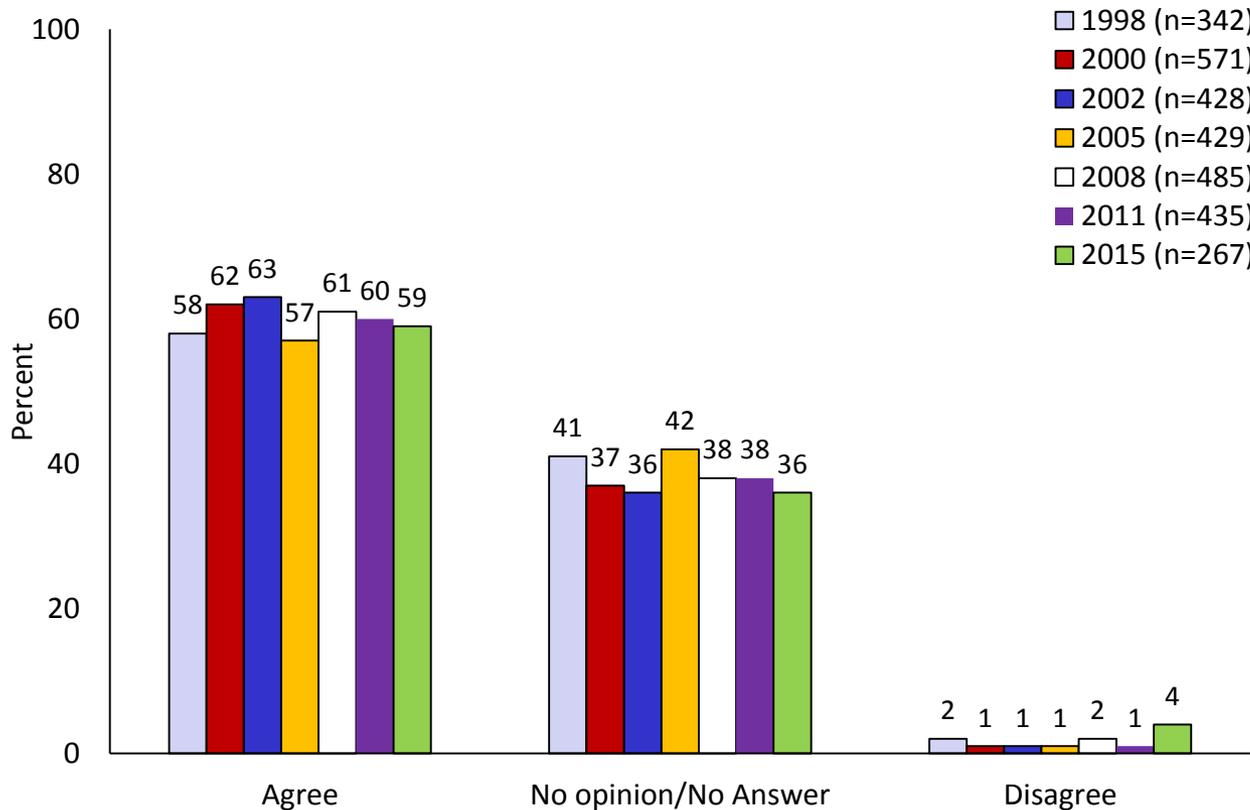


Similarly, 6-in-10 customers (59%) agree that PWD is responsive to emergency situations and few (4%) disagree.

A sizable bloc of customers (36%) likely have no experience in this area and thus stated that they have no opinion or declined to answer.

Trends in PWD Being Seen as Responding Quickly to Emergencies

For each of the following, please check one circle to indicate how much you agree or disagree with the given statement: Responds quickly to emergencies



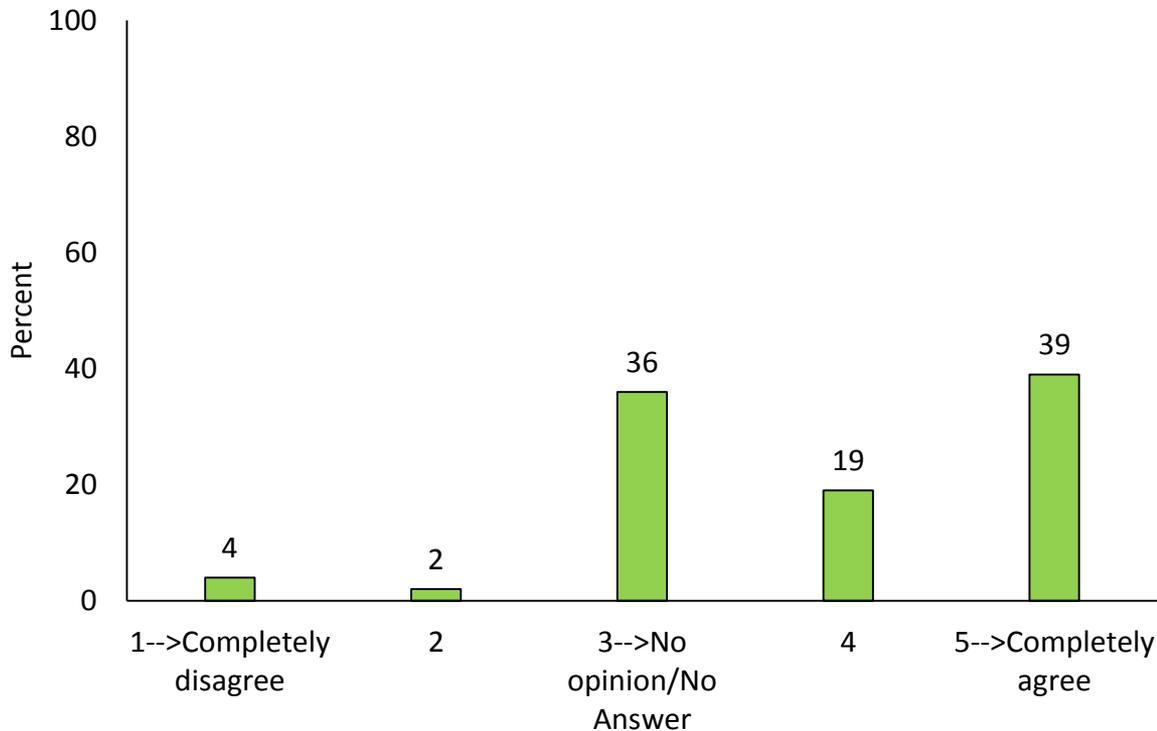
Generally, agreement that the Water District responds quickly in times of emergency has trended similarly dating back to 1998, with roughly 6-in-10 customers agreeing that PWD responds quickly to emergencies.

Very few customers disagree, with most of the remaining respondents claiming to not have an opinion and/or choosing not to provide an answer (a likely indication of limited awareness).

Agreement that PWD Produces Error-Free Bills

Question 14C: For each of the following, please check one circle to indicate how much you agree or disagree with the given statement:

Produces error-free bills

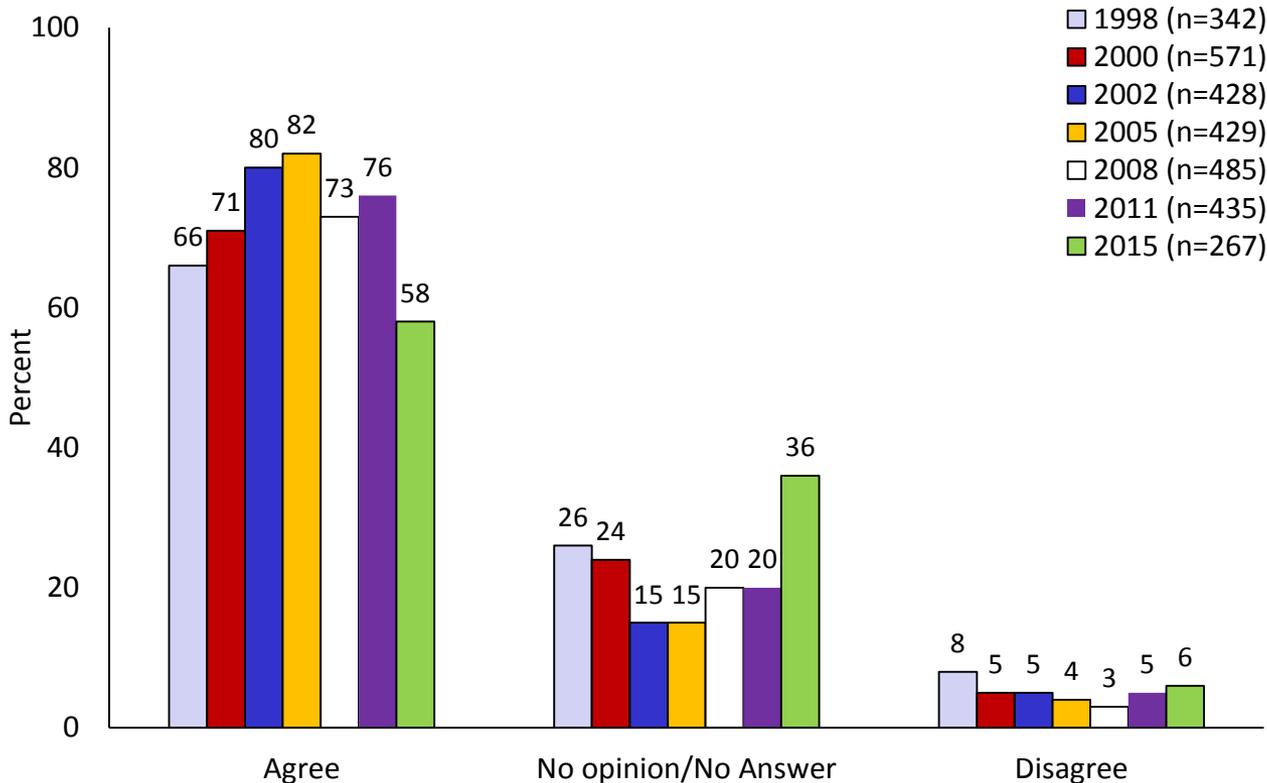


A majority of customers agree that the Water District produces bills that are free of errors (58%) and few (6%) disagree.

Roughly one-third (35%) either stated that they have no opinion or declined to respond.

Trends in PWD Producing Error-Free/Accurate Bills

For each of the following, please check one circle to indicate how much you agree or disagree with the given statement: Produces error-free bills



While the 2015 measurement reflected a wording change from prior iterations of the study, it is nevertheless interesting to see the proportion of customers in agreement that PWD billing is error-free represent a decline over previous measurements (which used the word 'accurate' rather than 'error-free').

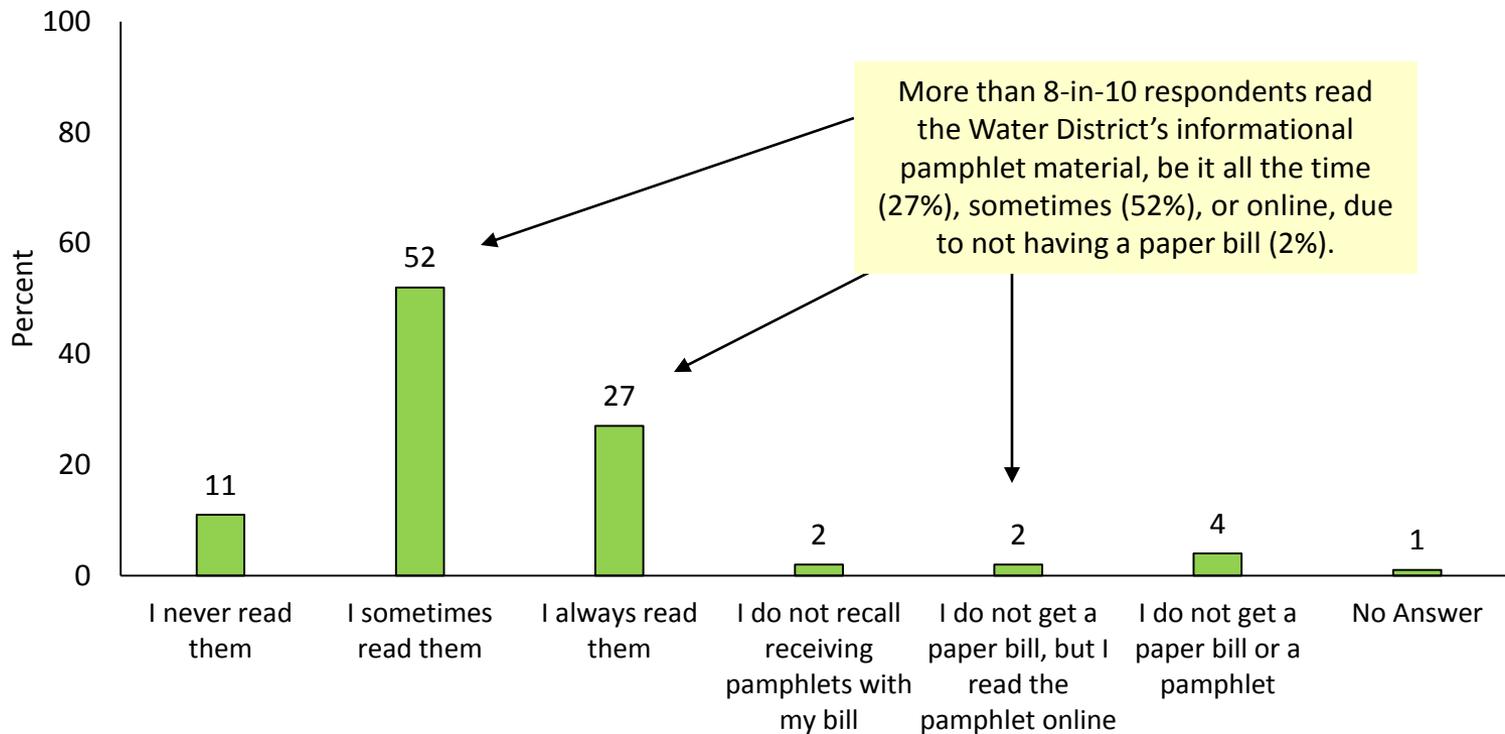
Similarly, the proportion of those indicating 'No opinion' or declining to answer grew in 2015 at a similar rate, relative to past measurements.

* In measurements prior to 2015, the question wording asked customers' level of agreement with the statement: Portland Water District produces bills that are accurate..

Activity Around Communications

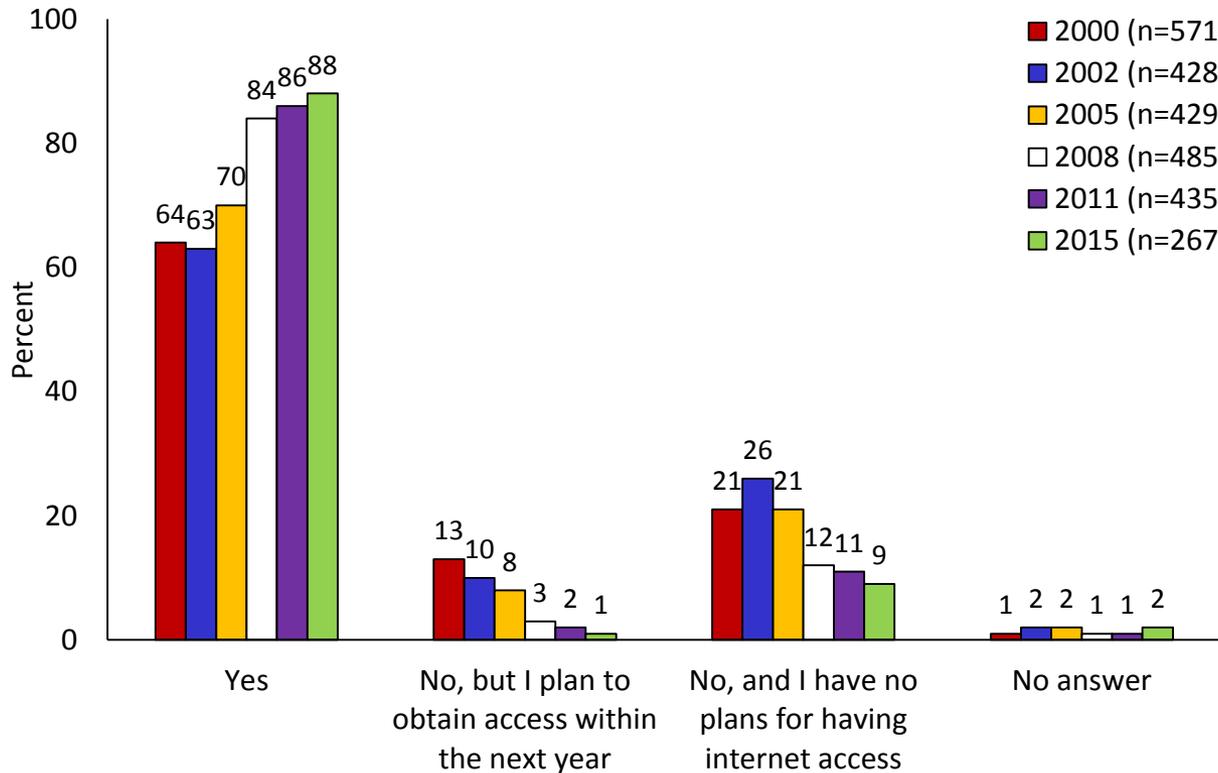
Engagement with Informational Pamphlets Including with Bills

Question 15: How frequently do you read the informational pamphlets that you receive with your Portland Water District bill?



Trends in Internet Access

Question 16: Do you have access to the Internet?



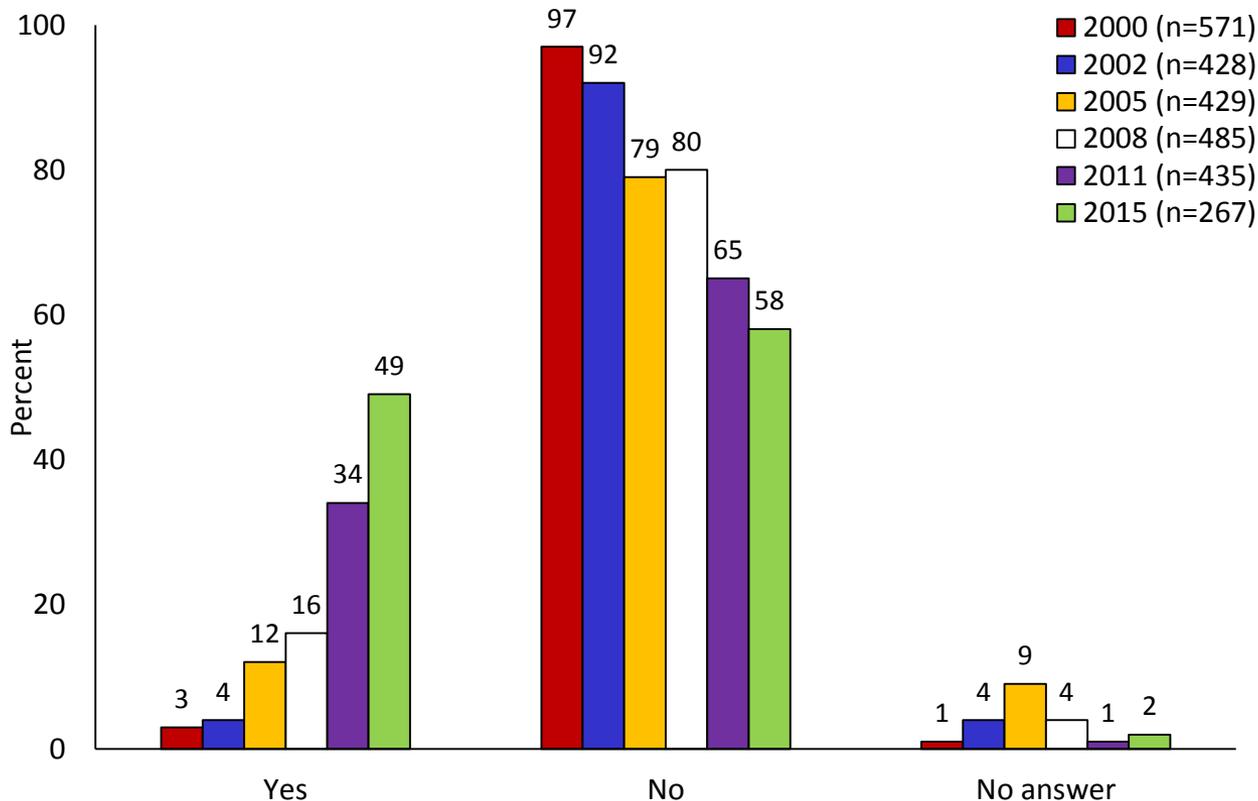
Consistent with broader trends across Maine and the nation as a whole, reported Internet access has grown consistently across the various measurements for PWD.

Presently, nearly 9-in-10 survey respondents claim to have access to the Internet, an increase of almost 40% over the level observed in 2000.

Given this level of penetration among its customer base and the challenges in response rate for the 2015 study, the Water District may wish to consider a complementary online option with future measurement efforts.

Trends in Visiting *www.pwd.org*

Question 17: Have you ever visited Portland Water District's website?



As Internet access has risen, so too have claims of visiting the Water District's website.

Since the item was first included in the 2000 measurement, reported visitation of the site has risen from just 3% of responding customers to 40% presently.

