



# Research Findings on Residential Customer Satisfaction

CHELAN PUD

MAY 2022





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# METHODOLOGY

- Strategies 360 conducted a multi-modal survey of **600 residential rate payers** in Chelan County, Washington.
- Interviews were conducted **May 4-10, 2022**. A combination of landline, mobile phones, and online interviews via email and SMS invitations were used to ensure greater coverage of the population sampled.
- The margin of error for a survey of 600 interviews is **±4.0%** at the 95% confidence level. The margin of error is higher for subsamples.



# EXECUTIVE SUMMARY



# EXECUTIVE SUMMARY

- ✓ Despite a tumultuous two years since we last polled in summer of 2020, residential utility customers continue to provide high ratings to Chelan PUD.
- ✓ As in years past, satisfaction with the PUD is not limited only to specific groups or parts of the county. Positive ratings differ only by degree, and apply to every demographic subgroup we're able to measure.
- ✓ High scores for Chelan PUD include the full range of dimensions we tested, from reliability to communications and service to the community.
- ✓ Residents cite the “Connected” newsletter as a critical information source but also express a desire for more alerts via phone and email, as well as additional online tools.



An aerial photograph of a residential area, likely a resort town, featuring a large lake in the foreground, a road, and buildings. The background shows a range of mountains under a clear sky. The image is overlaid with a semi-transparent blue filter and a white grid pattern.

# RESIDENTIAL CUSTOMER DEMOGRAPHICS



## A demographic snapshot of the representative sample of residential customers:

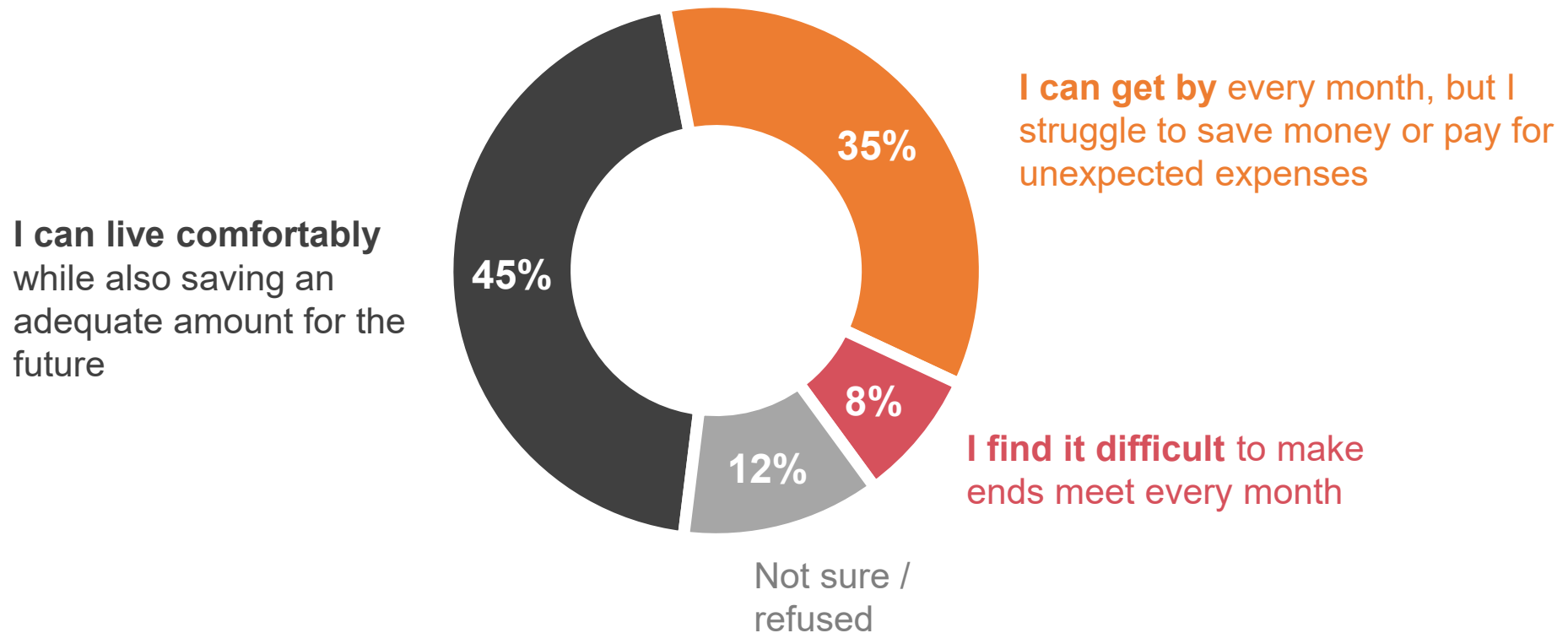
Men	50%
Women	50%
18-34	27%
35-49	22%
50-64	26%
65+	25%
Caucasian	68%
Latino	24%
Mixed race / other	2%
Full-time resident	82%
Part-time resident	16%



Less than 5 years	17%
5 to 19 years in county	30%
20 to 29 years in county	16%
30 years or more	33%
Wenatchee	47%
Chelan	14%
Cashmere	8%
Leavenworth	16%
Manson	7%
Rest of county	8%

Only a minority of residential customers say they can live comfortably and save adequately. COVID's lasting toll—combined with the challenging economic circumstances the country currently faces—have made this a difficult time for many.

### Which of the following best describes your personal financial situation?



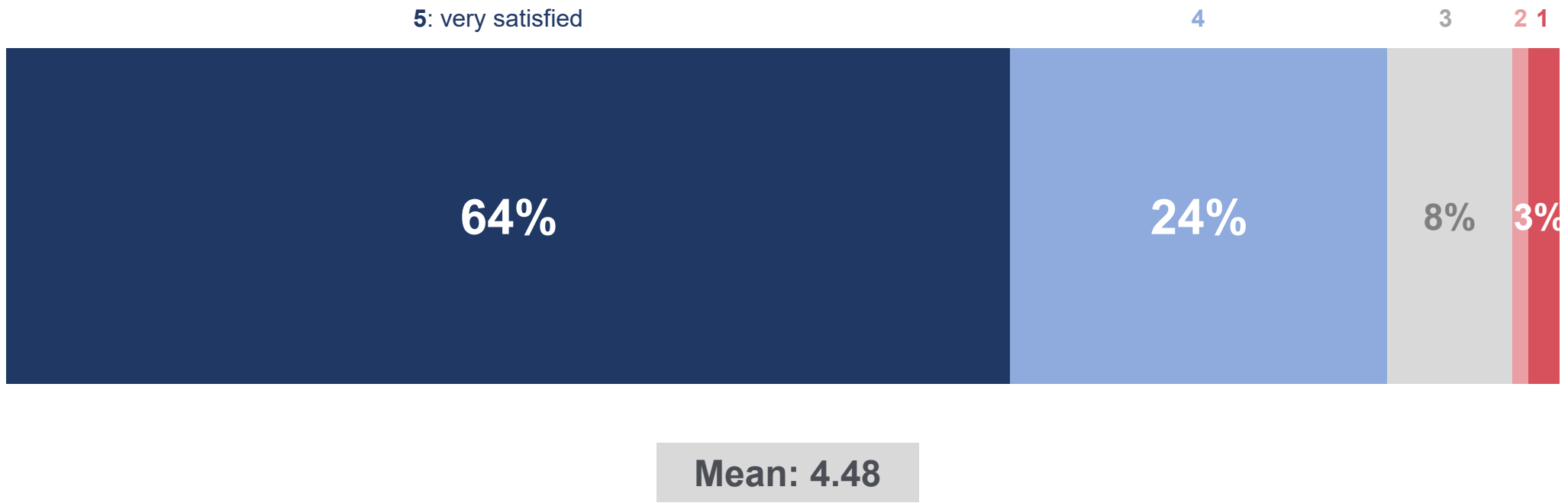




# OVERALL SATISFACTION

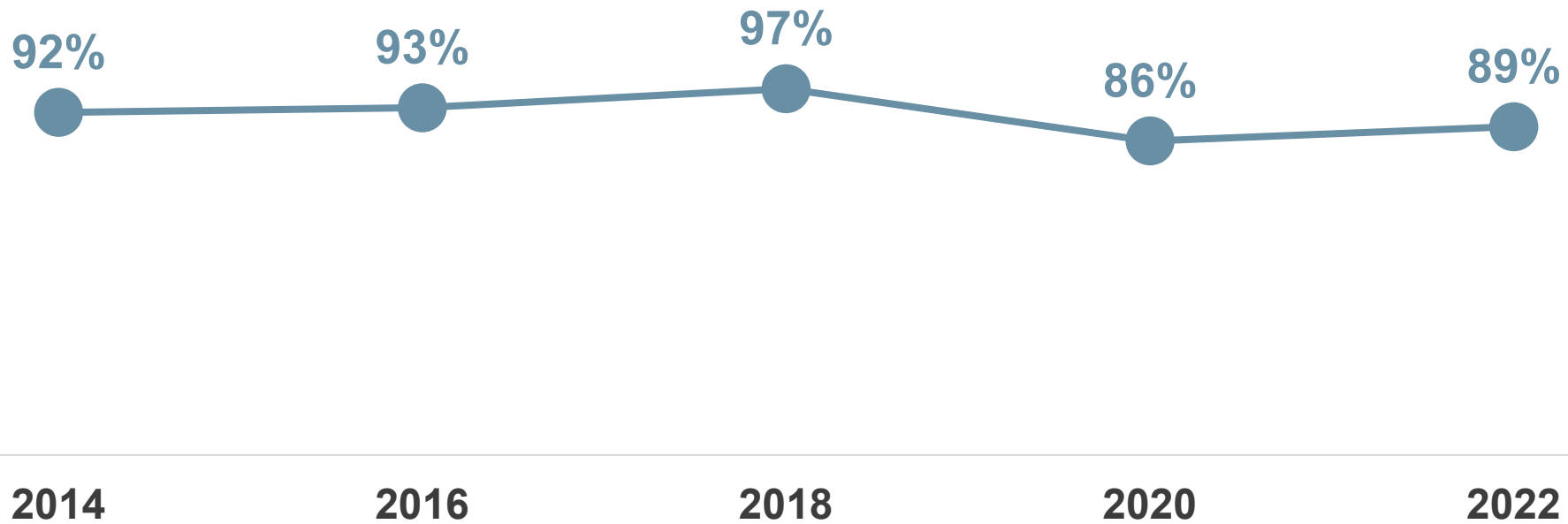
Despite the pandemic and a difficult period of economic turbulence, satisfaction with Chelan PUD remains very high in 2022.

### Overall satisfaction with Chelan PUD on a scale from 1 to 5



Compared to 2020, satisfaction levels are statistically unchanged (given the margin of error), though any movement appears to be in the right direction.

### Overall satisfaction with Chelan PUD on a scale from 1 to 5



Overall satisfaction (scores of “4” or “5”) is quite consistent across gender, region, and age. Strength of satisfaction (indicated by scores of “5”) does appear to be even higher outside in the less populated parts of the county and among older residents.

Satisfaction by gender, region, and age		
	% satisfied (4-5)	% <u>very</u> satisfied (5)
<b>Overall</b>	<b>89%</b>	<b>64%</b>
Men	88%	62%
Women	90%	66%
Wenatchee	87%	61%
Rest of county	90%	67%
Age 18-34	89%	61%
Age 35-49	87%	59%
Age 50-64	88%	66%
Age 65+	90%	71%



Personal finances mark one of the few fault lines in perceptions of satisfaction. Those having a hard time making ends meet—as well as those with higher average utility bills—express somewhat lower levels of satisfaction (overall and by intensity).

Satisfaction by financial situation & bill size		
	% satisfied (4-5)	% <u>very</u> satisfied (5)
<b>Overall</b>	<b>89%</b>	<b>64%</b>
*personal financial situation...	Live comfortably & save	93%
	Get by, struggle to save	86%
	Difficult to make ends meet	74%
average monthly bill size...	Less than \$50	90%
	\$50 to \$74	92%
	\$75 or more	83%

\*Based on the following question: “Switching topics, which of the following best describes your own personal financial situation? Is it...

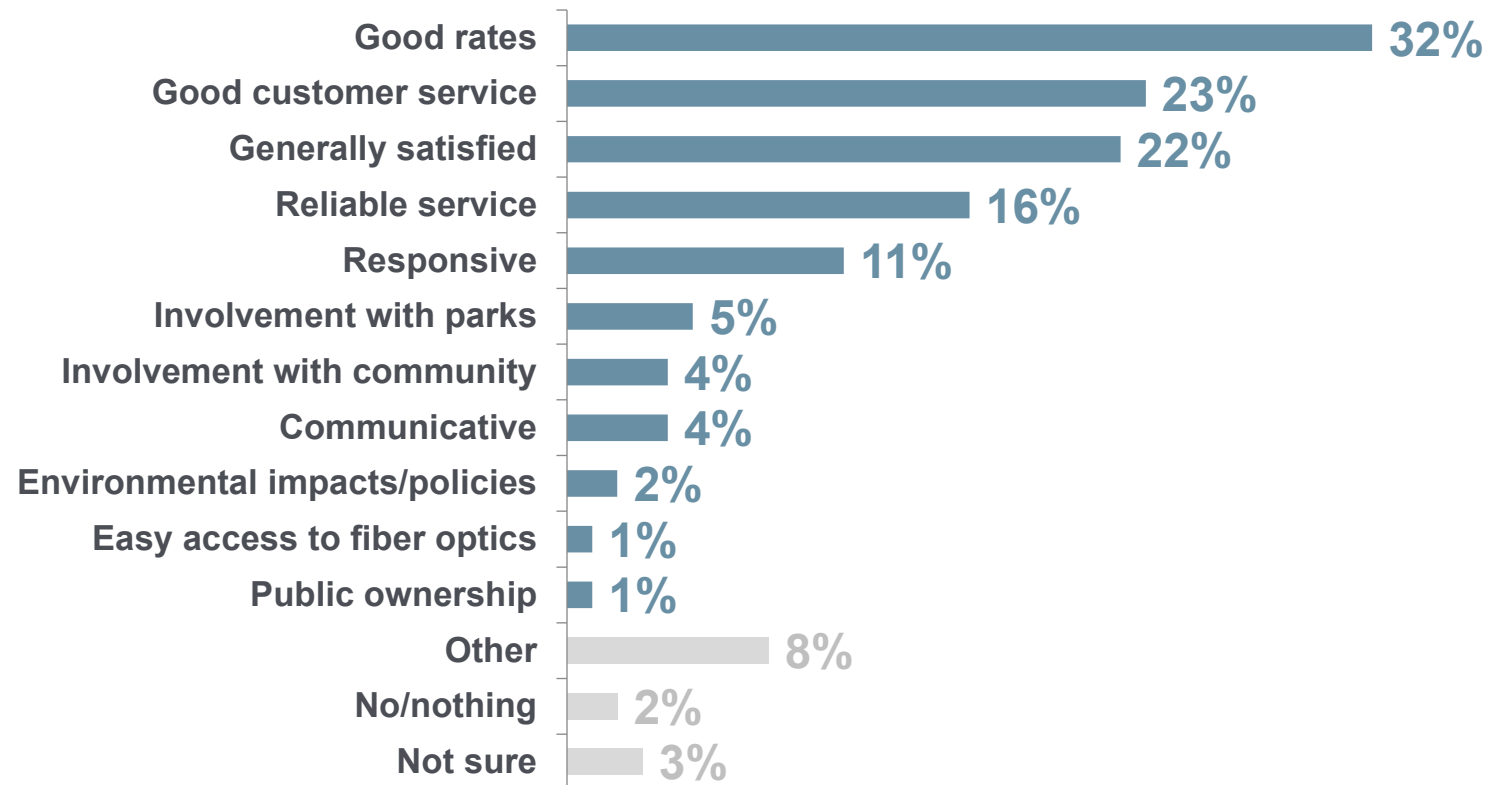
- I can live comfortably while also saving an adequate amount for the future (45%)
- I can get by every month, but I struggle to save money or pay for unexpected expenses (35%)
- I find it difficult to make ends meet every month (8%)

Residency status makes some difference as well (albeit less than personal finances). Indeed, homeowners are slightly more likely to describe themselves as very satisfied, as are new arrivals to the county (a shift compared to 2020).

Satisfaction by length of time in area & home status		
	% satisfied (4-5)	% <u>very</u> satisfied (5)
<b>Overall</b>	<b>89%</b>	<b>64%</b>
length of time in county...	Less than 5 years	71%
	5-19 years	63%
	20 years or more	62%
Full-time residents	88%	64%
Part-time residents	90%	66%
Renters	85%	58%
Homeowners	90%	66%

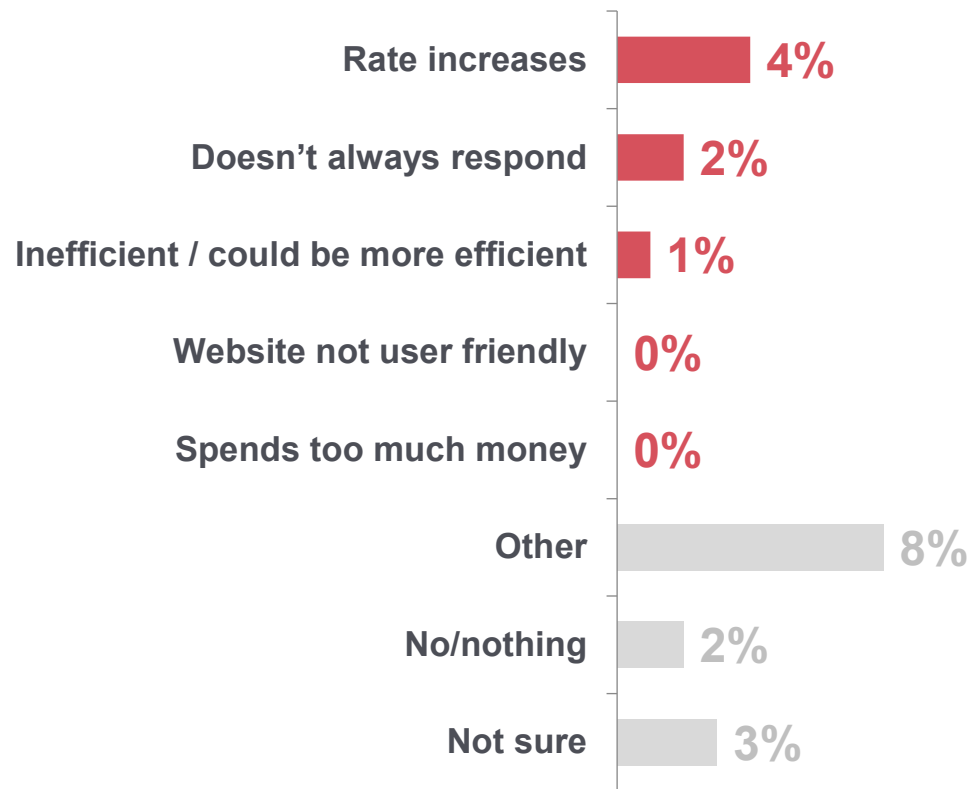
The rationale for positive ratings looks much like it has in the past: good rates, responsive customer service, and reliability.

### In your own words, can you explain why you rated your overall satisfaction positively?\*



Meanwhile, perceived rate increases top the list of reasons for those with a negative satisfaction rating.

### In your own words, can you explain why you rated your overall satisfaction negatively?\*



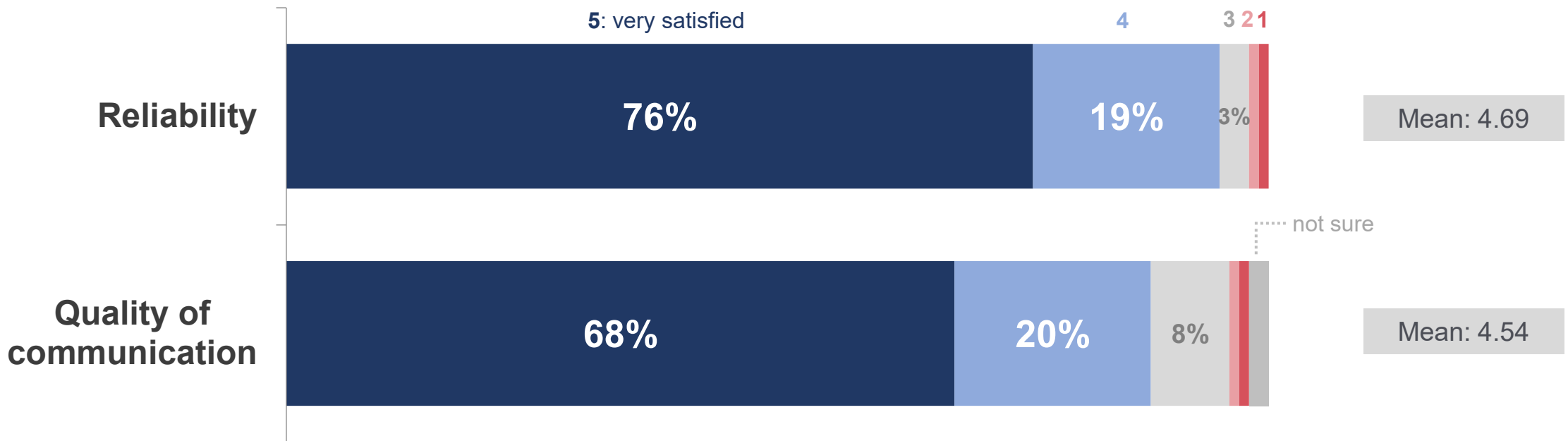




# SATISFACTION METRICS

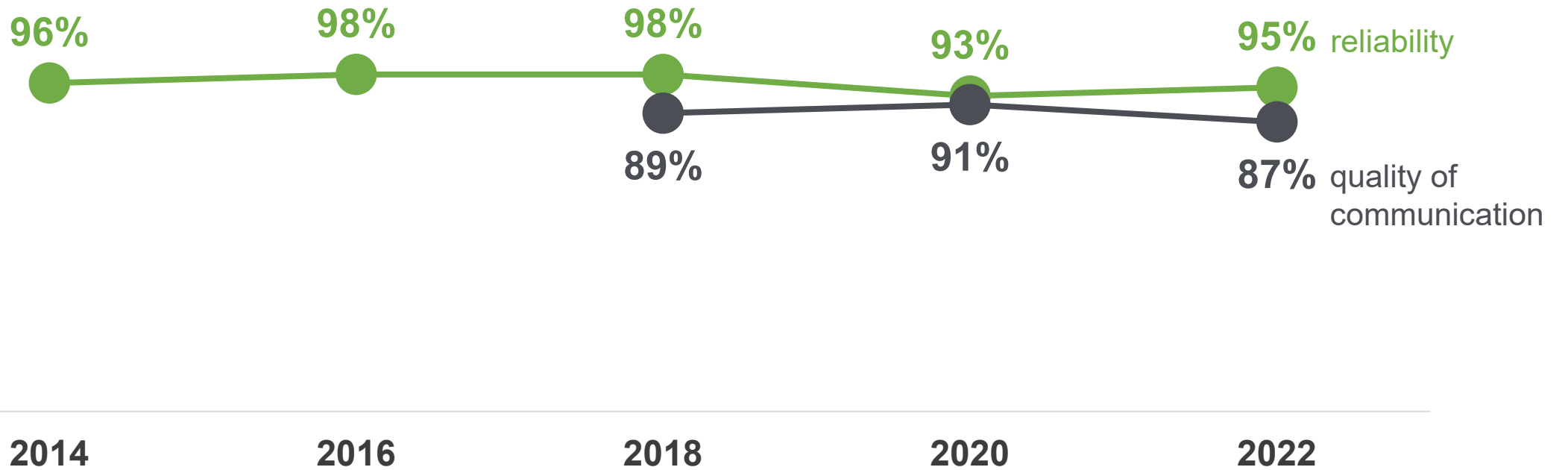
When it comes to reliability and communication, residential customers report equally high levels of satisfaction.

### Satisfaction on specific metrics on a scale from 1 to 5



Chelan PUD's reliability score is statistically unchanged compared to 2020, while its communication score has dipped (but only slightly).

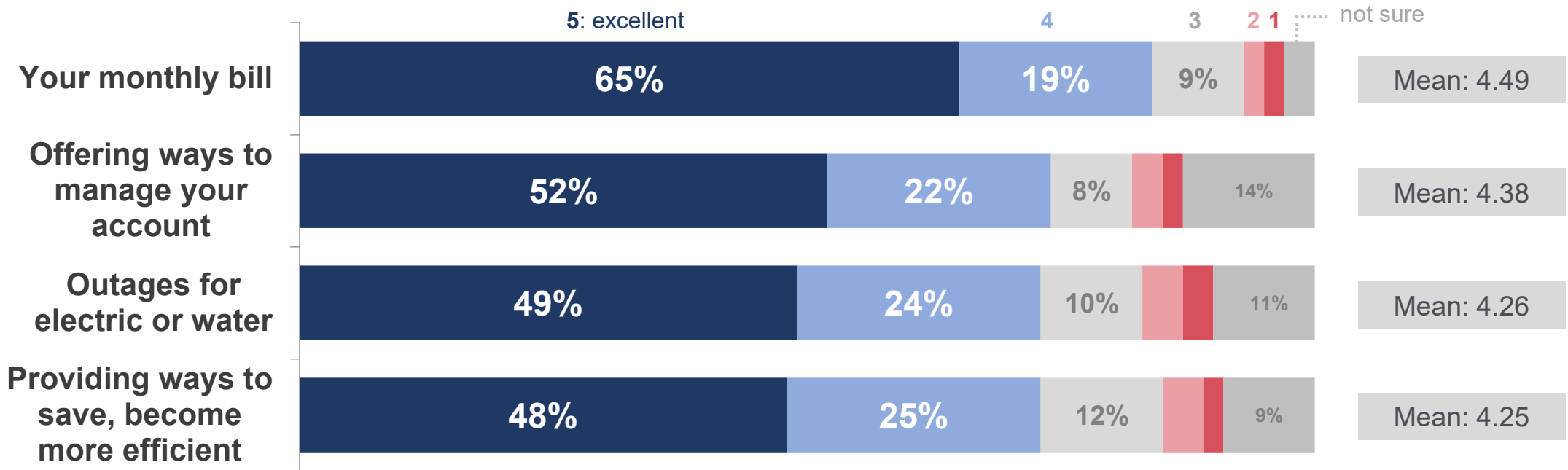
### Satisfaction on specific metrics "satisfied" scores (4-5)



Residential customers provide strong ratings on the individual aspects of communication—especially on the monthly bill.

### Performance on different aspects of communications

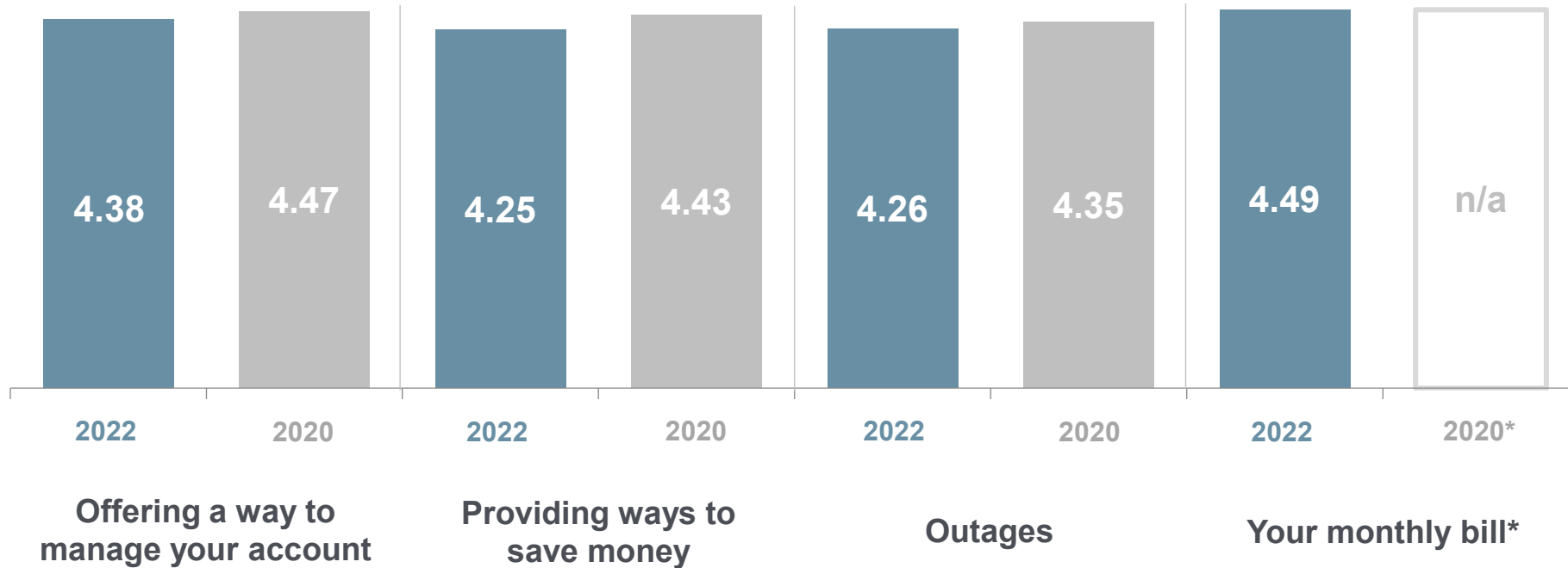
how well does the PUD communicate with customers on...





Furthermore, scores on each of these dimensions are consistent with what we found in 2020.

### Communications with customers over time by mean score



“Switching gears, please rate how well Chelan County PUD communicates with customers on several topics. Please use a scale of one to five, where one is ‘poor’ and five is ‘excellent.’ How well does the PUD communicate with customers on...”

\*“Your monthly bill” asked for the first time in 2022.

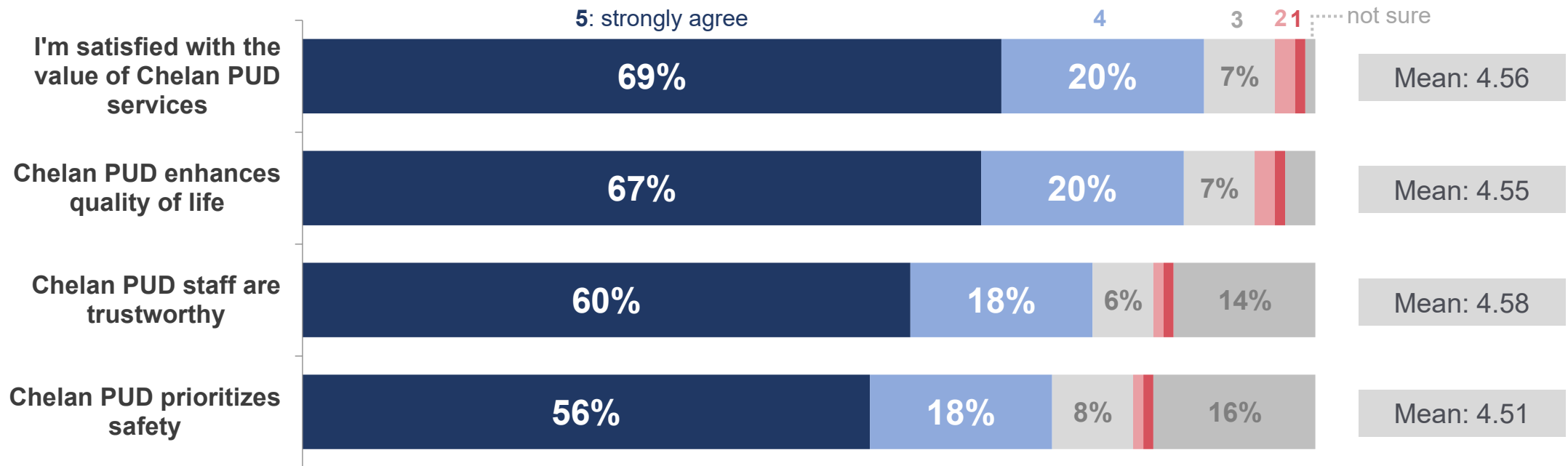


# CUSTOMER PERCEPTIONS OF CHELAN PUD

Nearly everyone is satisfied with the value of Chelan PUD services and agree that Chelan PUD is enhancing quality of life in Chelan County. While it also scores well on trustworthiness and safety, a larger number of residents say they don't know enough to rate the PUD on those dimensions.

### Chelan PUD's image

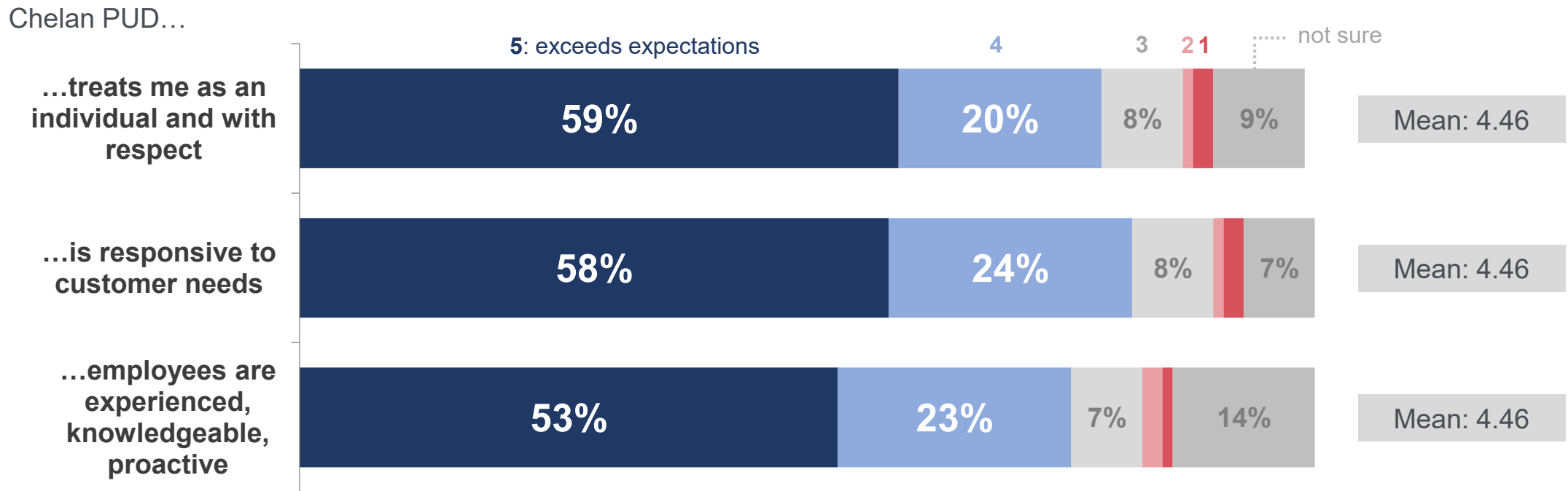
do you agree or disagree with the following statements about Chelan PUD?



Breaking down the customer service experience reveals near-unanimous agreement that Chelan PUD staff are meeting or exceeding expectations on respectfulness, responsiveness, and experience.

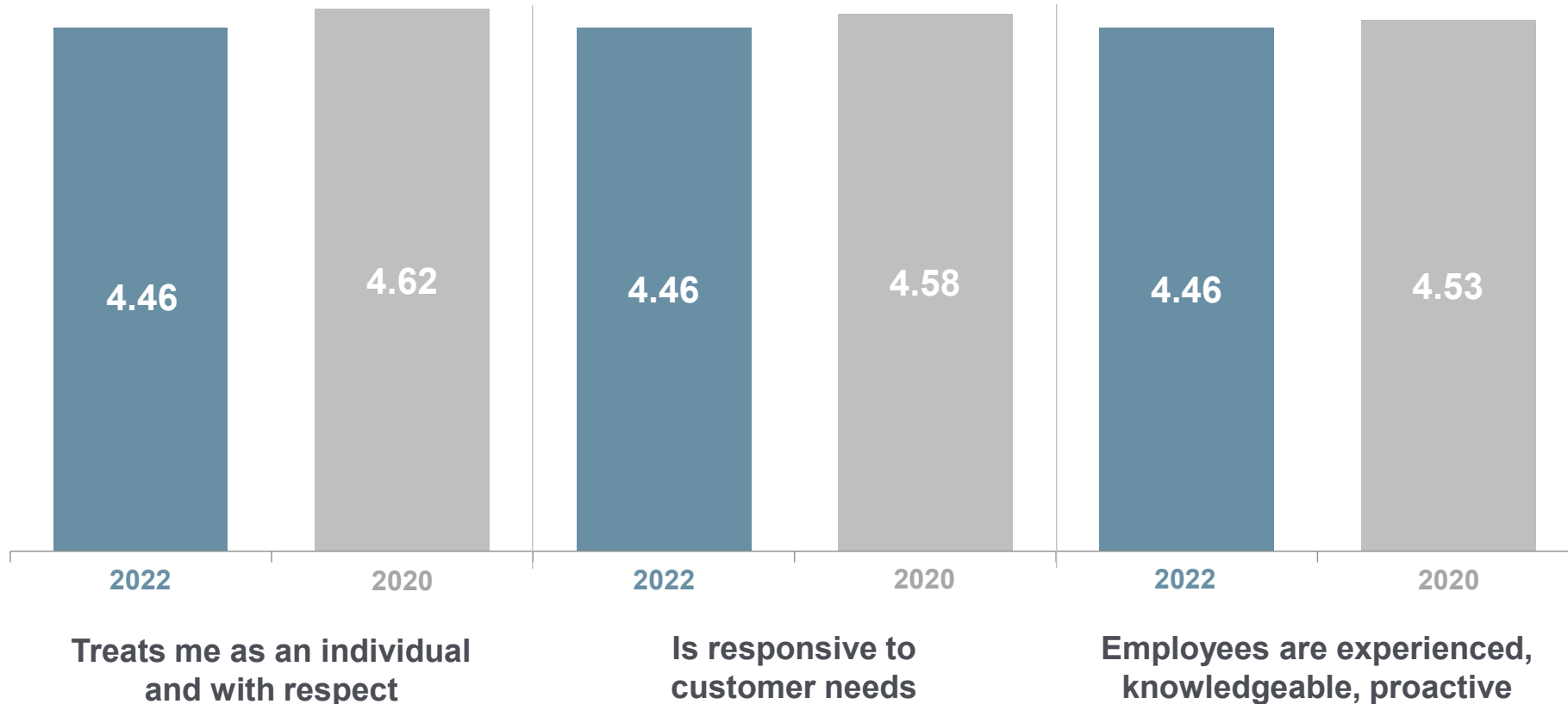
### Perceptions about customer service

please evaluate the following statements...



Like its communications ratings, Chelan PUD's customer service scores look essentially unchanged over the past two years.

### Perceptions about customer service by mean score





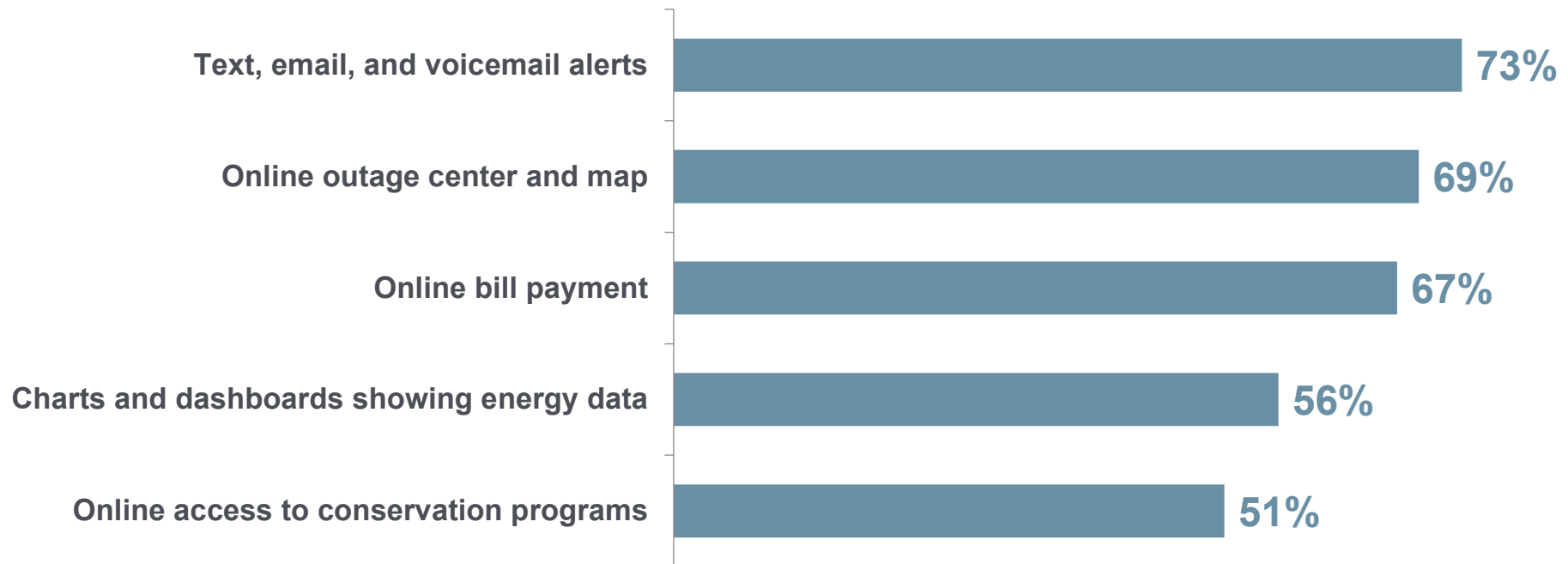
An aerial photograph of a community, likely a resort or retirement community, featuring a large lake, a golf course, and a cluster of buildings. The scene is set against a backdrop of forested mountains. The image is overlaid with a semi-transparent blue filter and a white grid pattern.

# COMMUNITY OUTREACH

Customers across the county express the strongest preference for phone and email alerts. An outage center and online bill payment also generate considerable interest.

### Preferred methods of interacting with Chelan PUD

% high priority (rated "4" or "5" on a 1-5 scale)



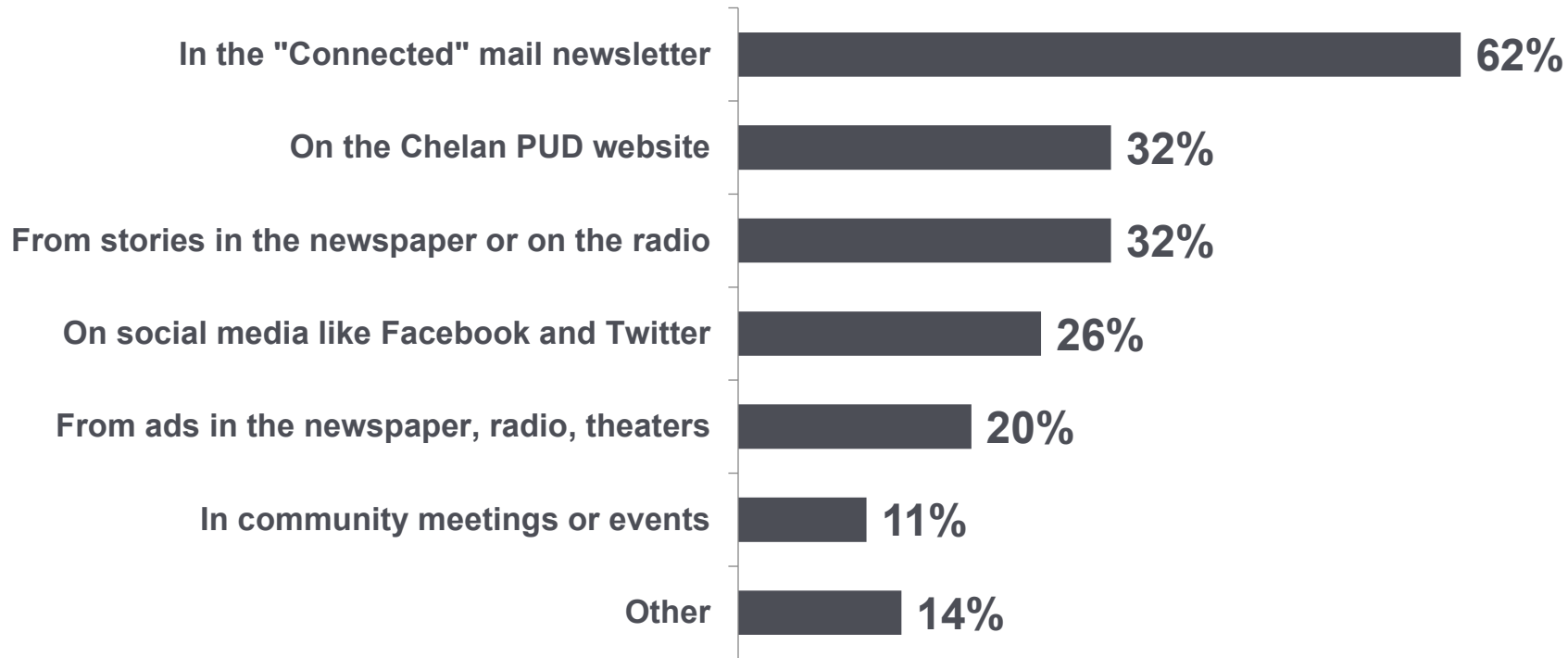
"In the coming years, Chelan PUD will be able to offer more ways for customers to access their PUD accounts and interact with the utility – both by PC and mobile device. How much priority should each of the following tools and resources be given? A rating of "5" means developing that tool should be one of Chelan PUD's highest priorities, while a rating of "1" means it isn't really a priority. Remember that while all of these may be important priorities, not all of them can be a "5.""

There are some differences by age and race, but phone and email alerts consistently top the chart for residents of all backgrounds.

Preferences by age & race						
	18-34	35-49	50-64	65+	White	Latino
Text, email, voice alerts	77	72	78	66	71	83
Online bill payment	75	71	65	55	61	82
Online outage center/map	74	70	75	58	65	81
Online conservation programs & tips	65	52	50	38	45	71
Charts for consumption, weather, energy data	59	57	58	52	52	69

The dominant news source for most customers is the Connected newsletter, outpacing other mediums two to one. While online options are more prevalent among younger customers, Connected is the most popular source regardless of demographic.

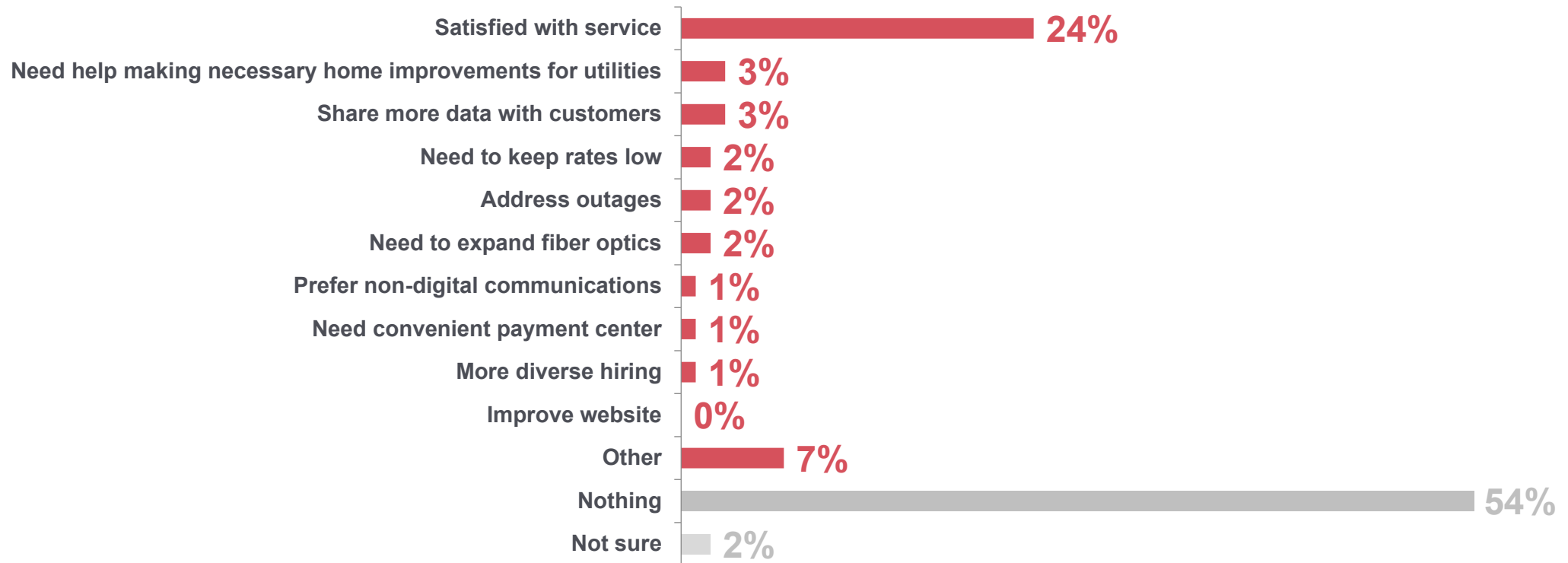
### Sources for PUD news and updates



Few customers listed outstanding concerns or feedback at the end of the survey, suggesting they feel their needs are largely heard by the PUD.

### Is there anything else you want Chelan PUD staff to be aware of?

open ended; customers responded in their own words\*





Finally, we checked in on plans to acquire EVs; roughly 36% of county residents plan to make an EV purchase sometime in the future.

### Are you planning to purchase an electric car or truck at some point?





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