

Research Findings

Chelan PUD Biannual Customer Satisfaction

Research Results Summary:

Chelan County PUD Customers; Customer selected via stratified random selection to be representative of customer base.

Data Collection fielded May 14 through June 13, 2024

N=847 responses for 2024 analysis, compared to 2022 results where applicable.

Methodology

- Strategic Research Associates, of Spokane, conducted a multi-modal survey of 847 residential ratepayers in Chelan County who, to be included, confirmed they were customers of Chelan PUD during the interview.
- Interviews were conducted between May 14, 2024, and June 13, 2024, in both Spanish and English. A combination of email invitations was sent to randomly selected ratepayers, as well as telephone interviews using known cell and landline numbers of Chelan County residents were used to ensure full representation of PUD customers in the final dataset.
- The margin of error for this survey with 847 responses is +/- 3.35% at 95% confidence. The margin of error is higher for subsample analysis.

Executive Summary

Overall satisfaction with Chelan PUD increased from 2022 efforts with **90.03% of respondents rating the PUD a "4" of "5"**, either somewhat or very satisfied.

2022 results indicated 87.92% of respondents rating the PUD at "4" or "5"

Satisfaction with key service elements show little variability. **Customers continue to be very satisfied with the reliability of their service, and other key measurements.**

Scores on satisfaction showed a minor decrease in satisfaction with communications about monthly bills.

Key variables that drive an increase (or decrease) in **overall satisfaction include monthly bills, and operational excellence.**

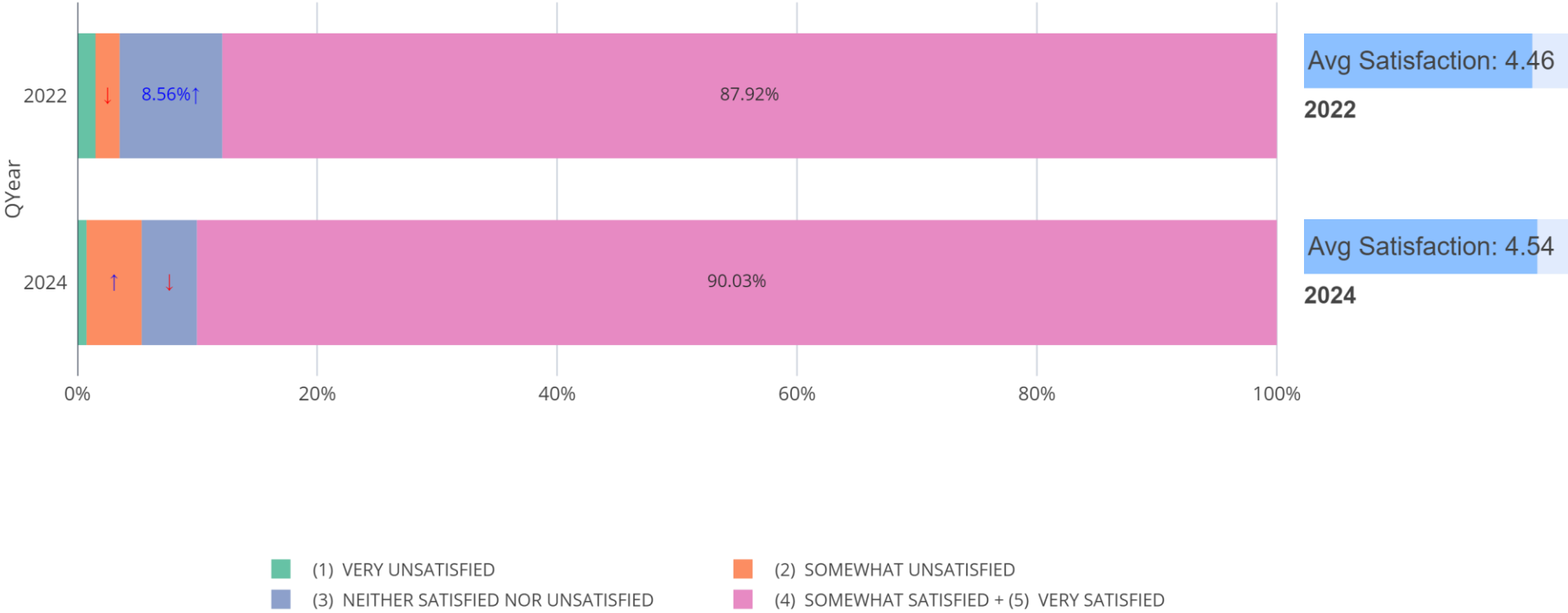
Focusing on these drivers are most likely to have the largest direct impact on overall satisfaction.

72.71% of customers feel the wildfire risk in Chelan County is "High" or "Somewhat High". Preparedness for a temporary shutoff is mixed among the community.

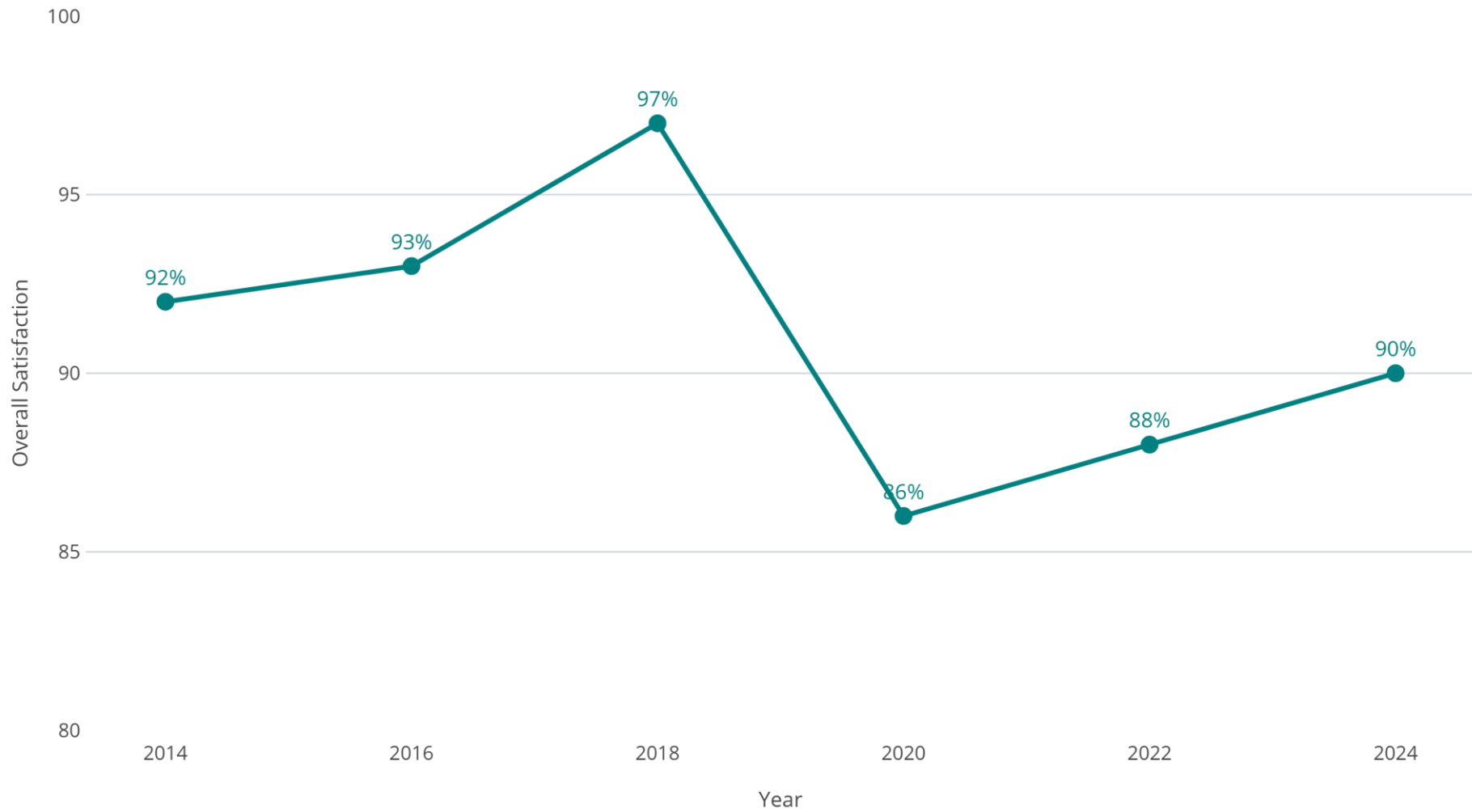
Renters are less likely to be concerned about wildfire risk.

Hispanics are less likely to indicate they are prepared for a temporary shutoff if it were to occur.

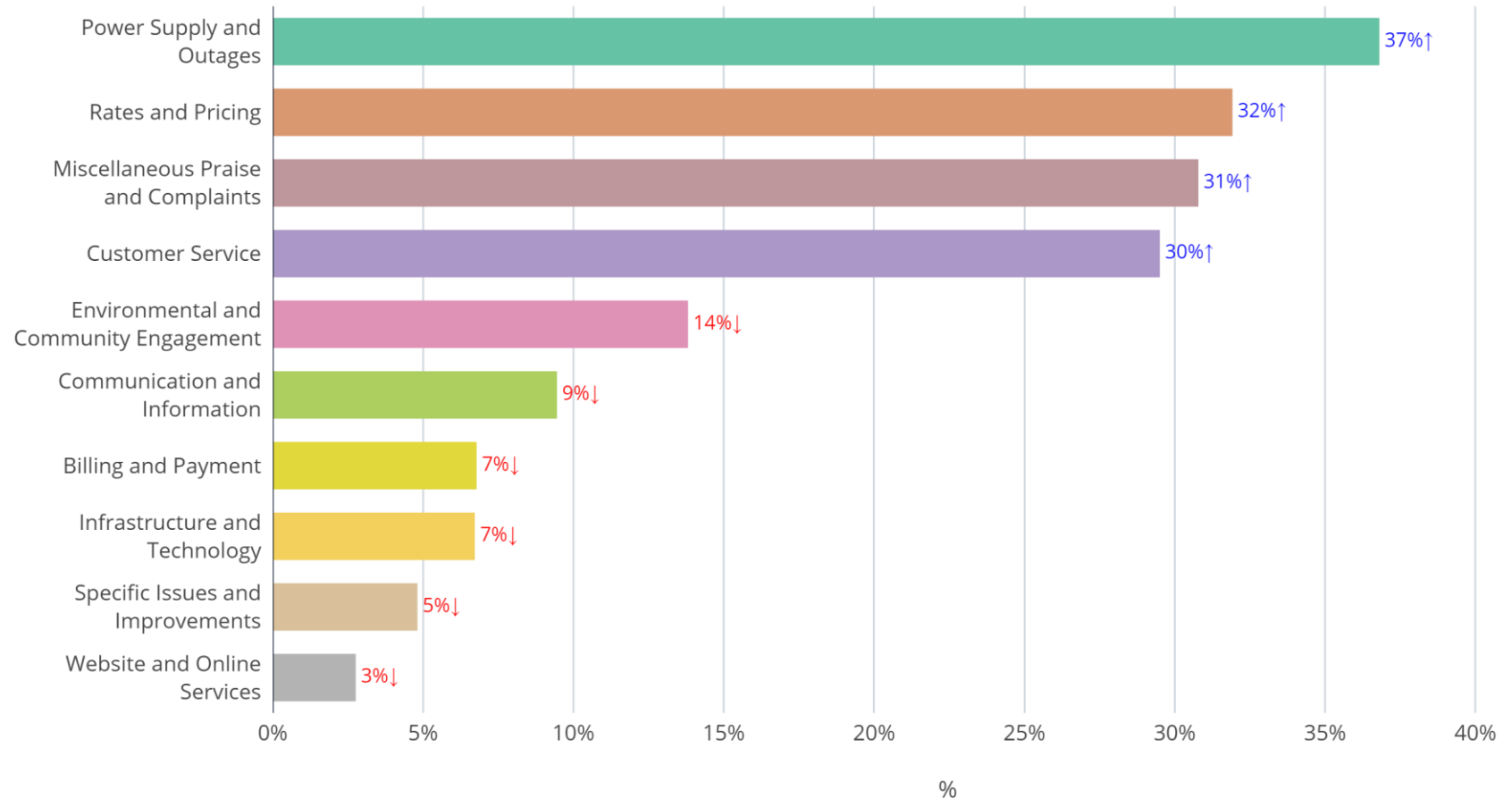
Satisfaction with the PUD increased in 2024. The increase in respondents rating the PUD a "5" is statistically significant.



Historically, overall satisfaction (those rating a 4 or 5) with the PUD continues to climb from its recorded low in 2020.

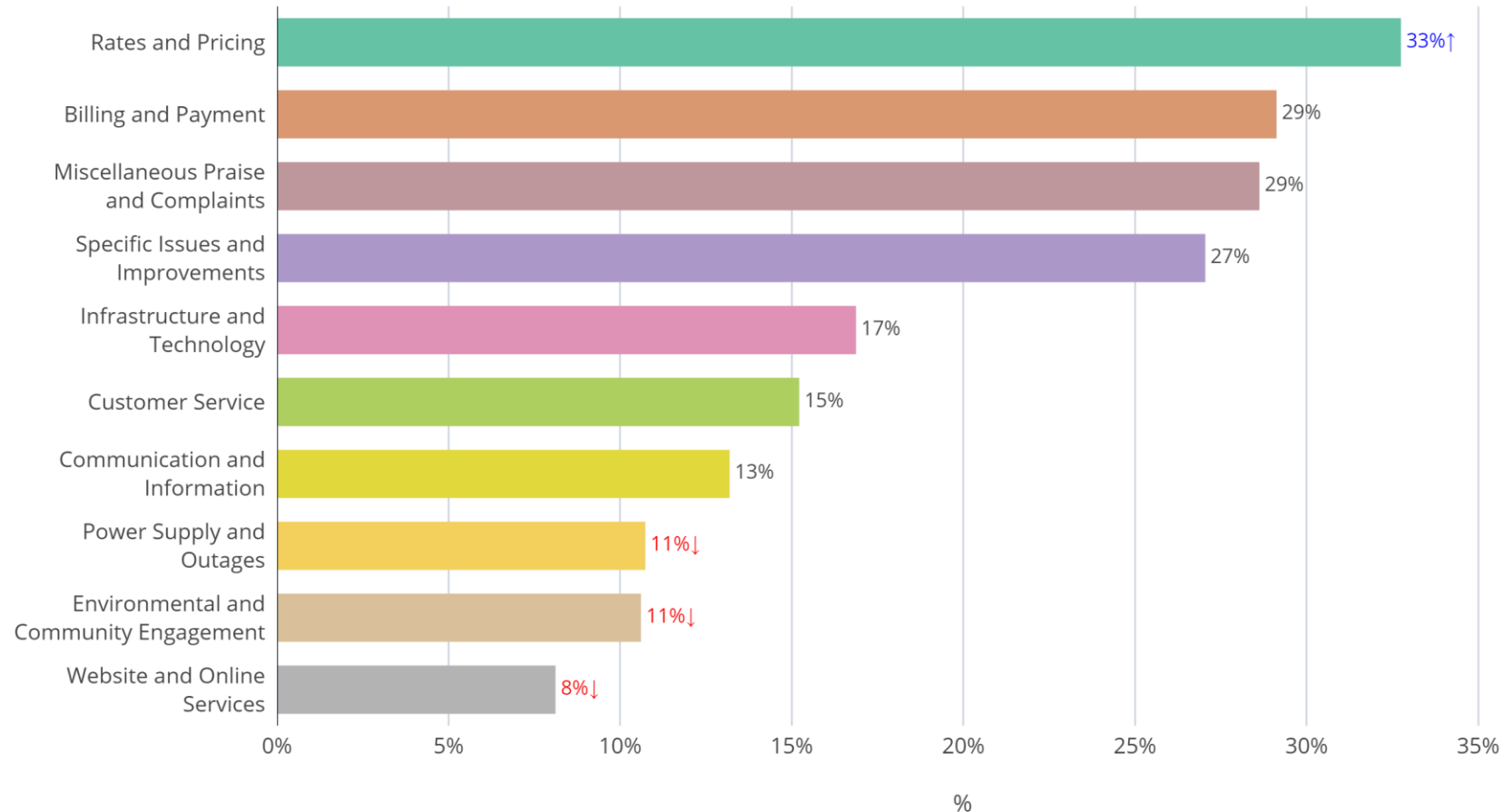


When asked to tell us why they rated the PUD a "4" or a "5" many indicated the reliability, and rates as main reasons for their satisfaction.



Q1b. Can you please tell us for what reasons you rate your satisfaction as ... ? (Open End) - Categorized SUMMARY
 Filter: Q1a. Overall, on a scale of 1 to 5, how satisfied are you with Chelan County PUD? On our scale 1 is 'Very Unsatisfied' and 5 is 'Very Satisfied'. is between 4 and 5 inclusive AND QYear is 2024; Weight: Weight: 2024 Sample to Race by Census; sample size = 745; 11 missing; effective sample size = 495 (66%); 48% filtered out; 95% confidence level

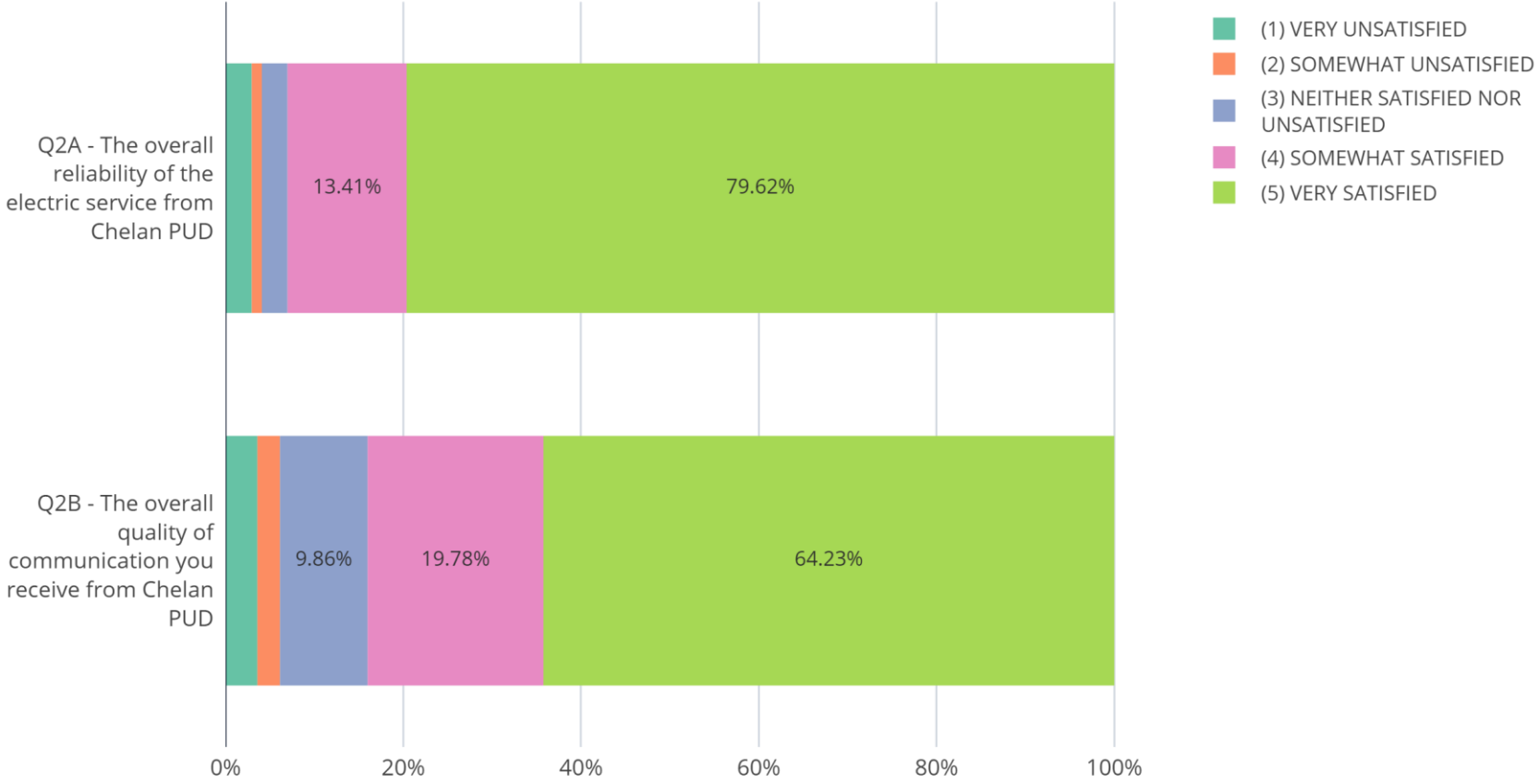
When asked to tell us why they rated the PUD a "3", "2" or a "1" many indicated the billing and payment process, as well as pricing are reasons for low satisfaction rates.



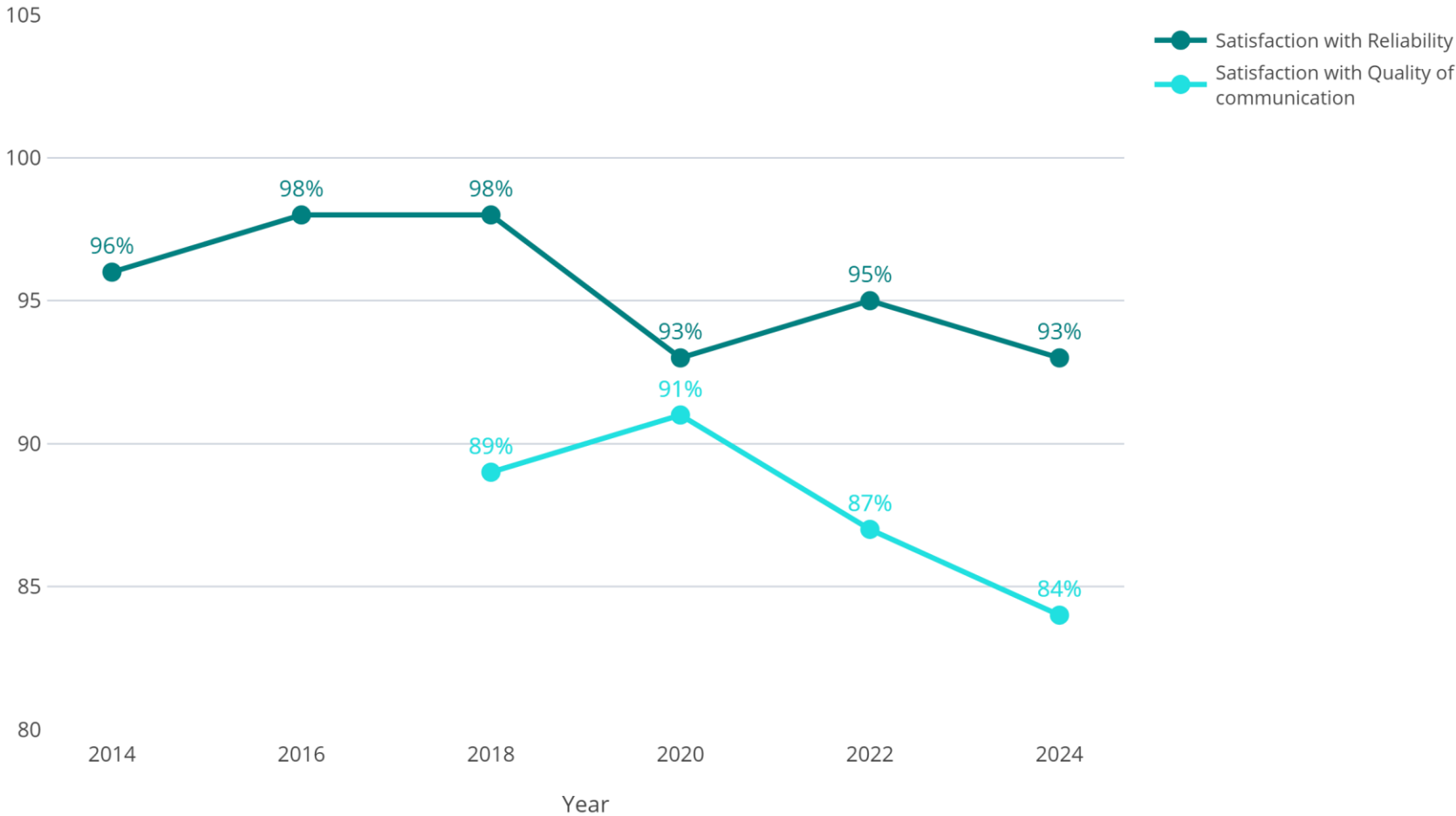
Q1b. Can you please tell us for what reasons you rate your satisfaction as ... ? (Open End) - Categorized SUMMARY

Filter: Q1a. Overall, on a scale of 1 to 5, how satisfied are you with Chelan County PUD? On our scale 1 is 'Very Unsatisfied' and 5 is 'Very Satisfied'. is between 1 and 3 inclusive AND QYear is 2024; Weight: Weight: 2024 Sample to Race by Census; sample size = 86; 5 missing; effective sample size = 57 (66%); 94% filtered out; 95% confidence level

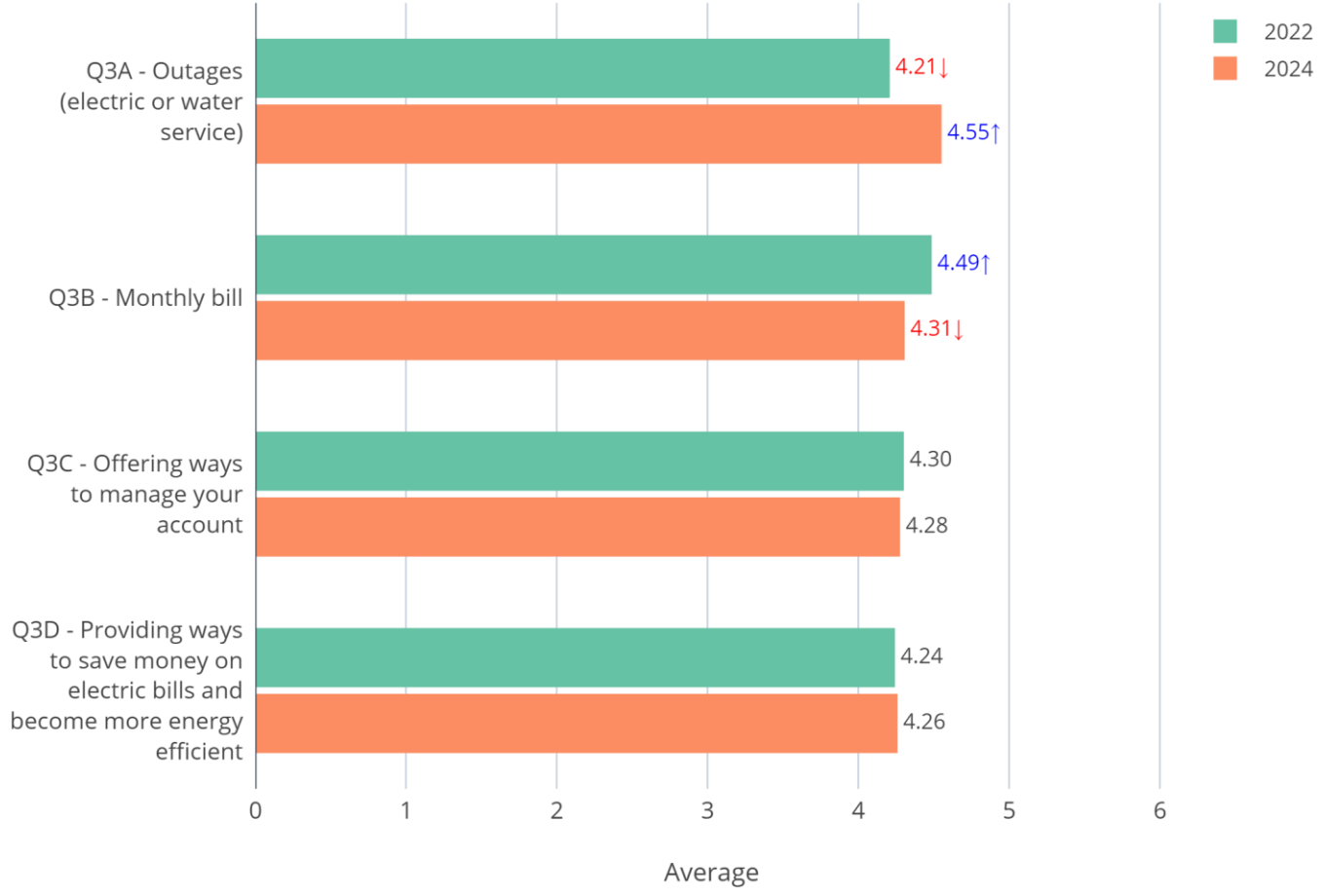
Quality of communication receives a lower score on satisfaction than reliability, driven by a middling of "3" and "4" ratings from respondents and less "5"s.



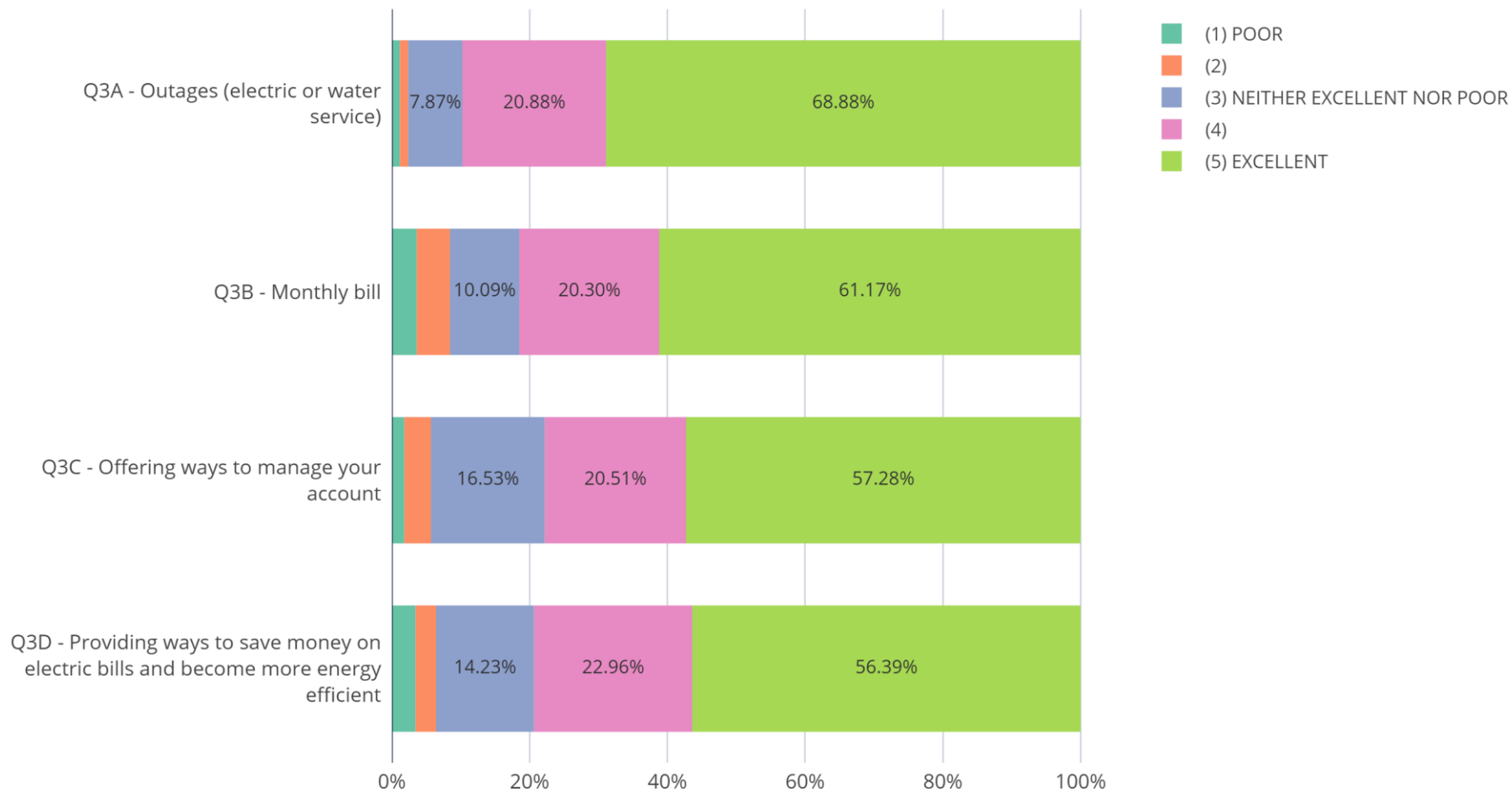
Satisfaction with reliability remains stable year over year, though not as high as earlier results. Satisfaction with quality of communication continues a downward trend from 2022, likely due to communications regarding billing software issues earlier in 2024.



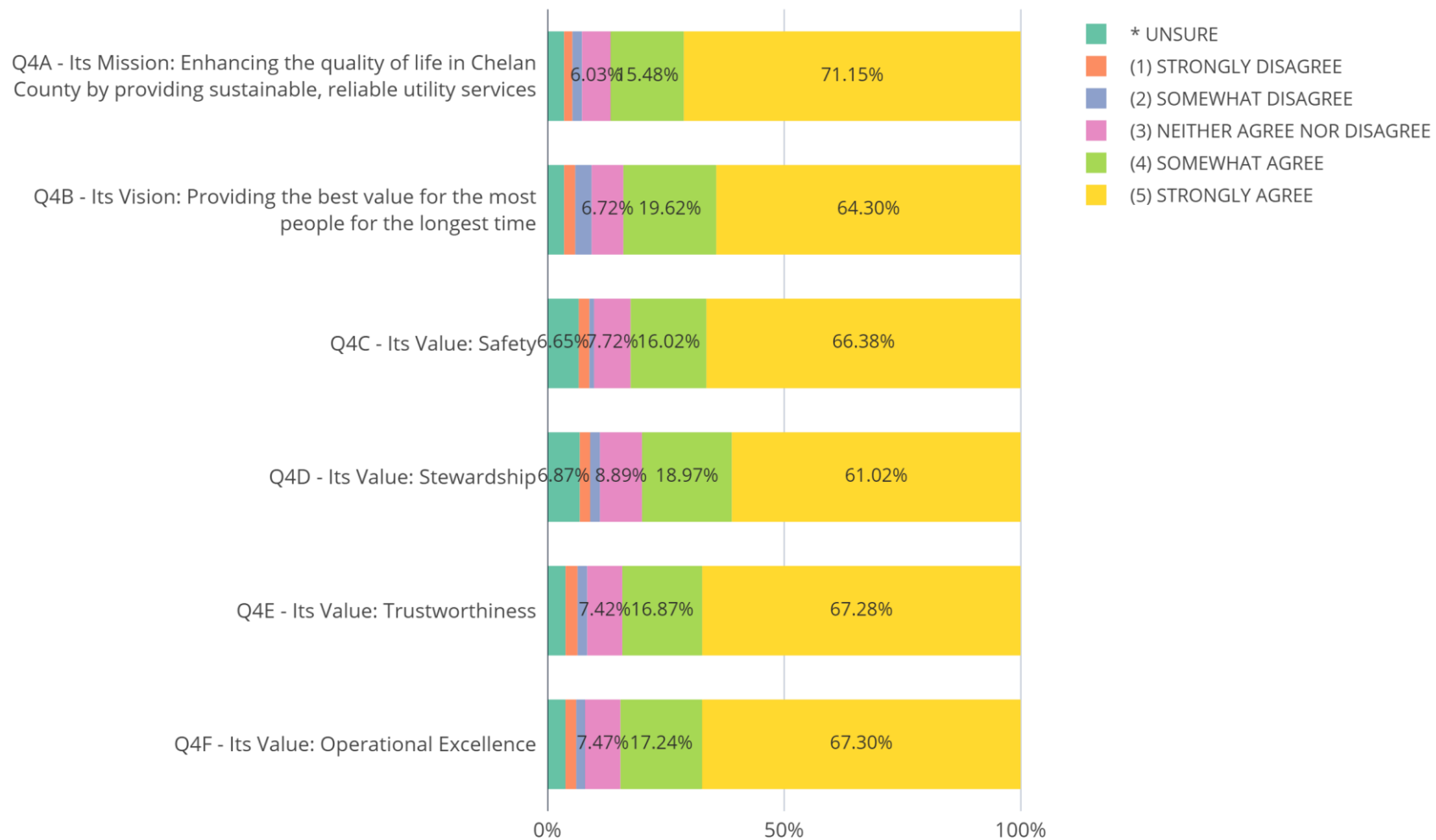
Respondents share that they feel communication about outages has increased in quality in 2024, while their satisfaction about communications regarding billing has decreased.



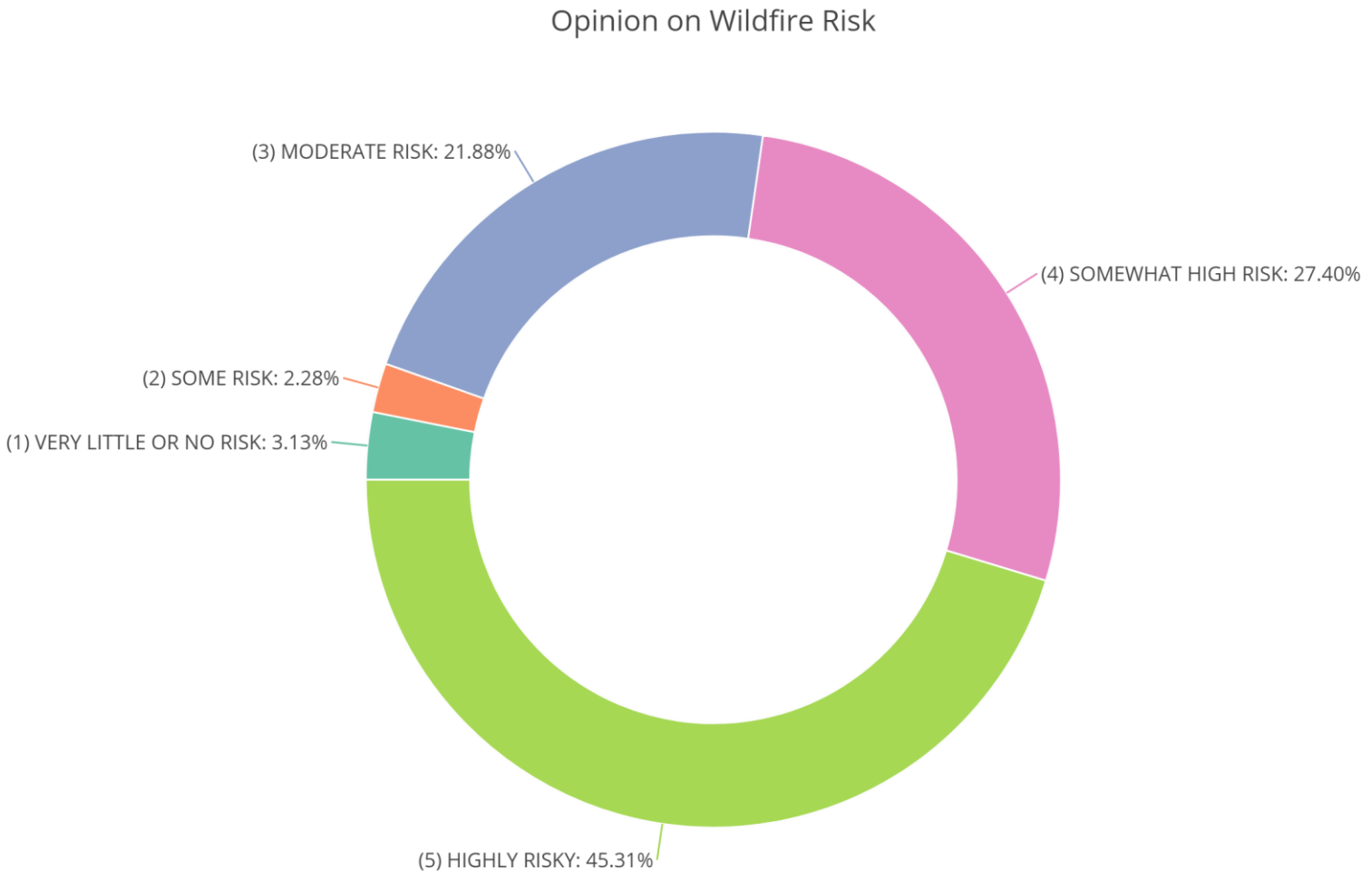
Communications about outages receives the highest rate of "5" ratings than others.



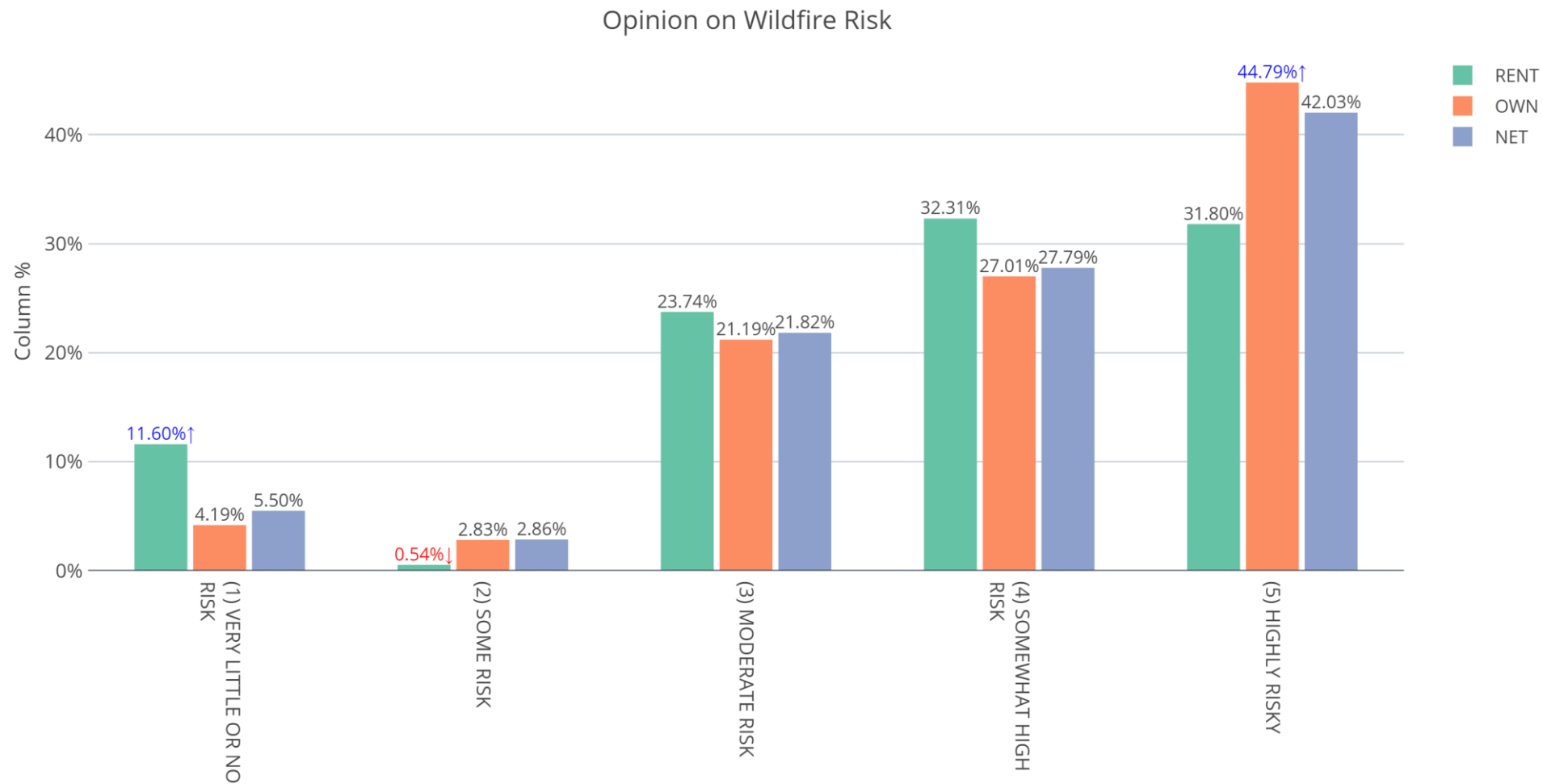
The measurements with the lowest instance of "5" ratings also had a high instance of "Unsure" ratings, which indicates confusion from customers as to what this value, vision, or mission statement relates to the PUD.



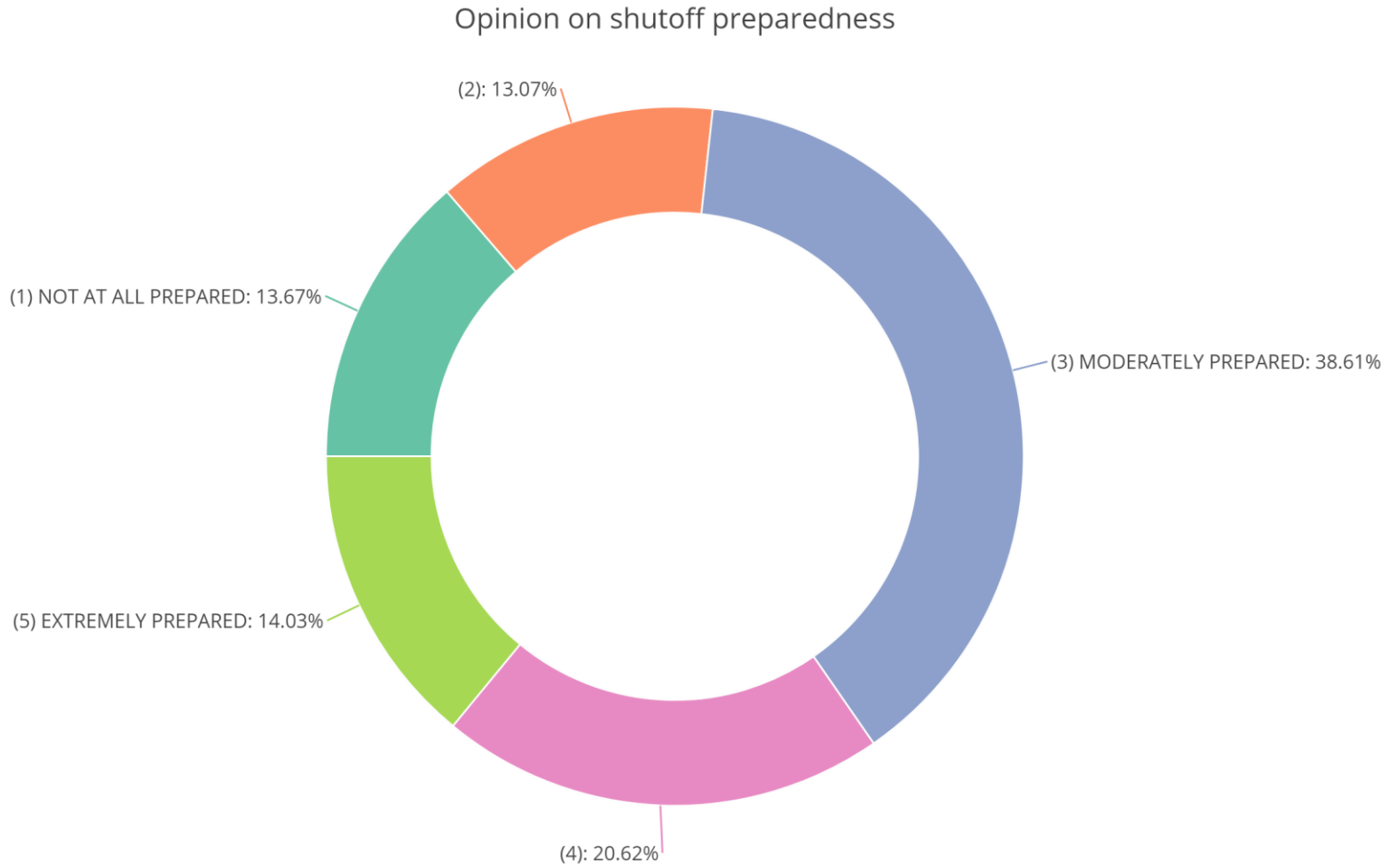
72.71% of respondents indicated that they felt there was "High" or "Somewhat High" risk of wildfires in Chelan County. Very few (8%) felt that the risk was low.



We find that concerns about wildfire risk are higher among homeowners, who were 13% (12.99%) more likely to indicate "Highly Risky" than renters.



Respondents were most likely to indicate that they felt they are "Moderately prepared" for a temporary shutoff during extreme fire weather to avoid new wildfire ignitions.



Addenda - Detailed Findings

The following includes additional analysis that expands upon the summary on the previous pages.



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- Wildfire risk and emergency preparedness
- Communications opportunities and preferences

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- Satisfaction with the reliability of the PUD's services and quality of communication
- Satisfaction with communications on specific topics
- Measurements on how the PUD is fulfilling Mission, Vision, and Value statements
- Satisfaction with key service measurements and satisfaction driver analysis
- Customer's opinions on wildfire risk
- Customers' opinions on temporary shutoff preparedness
- Where customers get their news and updates about the PUD

Panel Research Study: Objectives, Sample Sources, Targeting

The research study was conducted to support performance measurement and strategic planning goals. The survey was targeted among current Chelan PUD Customers (residential customers only) to better understand:

- Their satisfaction with the PUD overall
- Their satisfaction with the reliability of the PUDs services
- Their satisfaction with the PUD's communications, as well as their satisfaction with the PUD's communication on specific topics of interest.
- Customer's opinions on how well the PUD is fulfilling its mission, vision, and values.
- Explore additional topics of interest including where customers get their news and updates, opinions on wildfire risk, opinions on temporary shutoff policies, and opinions on the centralization of services

Fielding Dates

Data were collected between May 14th and June 13th, 2024, using online and telephone data collection methods. 73% of the responses collected were online, via email invitations. Specific efforts were made via telephone to reach Hispanic respondents, due to a low response rate from this segment from online email invitations.

Sample Summary - Responses by Method

	%	Count
ONLINE	73%	619
PHONE	27%	228
NET	100%	847

Survey Method SUMMARY

Filter: QYear is 2024; sample size = 847; 41% filtered out

Panel Research Study: Quotas, Sample Sources, Targeting

Project Plan/Sampling and quotas

- N=600 responses to be collected using a 10-12 minute length of interview (on average) survey instrument
 - Convenience sample from online respondents
 - Telephone data collection to continue to 600, targeting was attempted using sample to best balance to established quotas
 - Data to be collected online and via telephone, SMS will be sent upon request with link to online tool to encourage responses.
- Quota management
 - Fielding teams worked to limit bias by age, gender, and location through sampling management
 - Fielding teams worked to target responses and collect responses from 25 to 30% who identify as Hispanic/Latino
- Quota were set by City/Region, the total customer sample was stratified for sampling to ensure we limited over and under sampling in each market region. Targets were set to +/- 5% to ensure no over-sampling by City/Region
 - Wenatchee target = 40-45%
 - Chelan target = 10-15%
 - Leavenworth target = 10-15%
 - All others regions target = 40-25%

Given the final sample size of 847 responses, the margin of error for the results of this study can be summarized as +/- 3.35 at 95% confidence.

Sample Summary - Responses by Region

	%	Count
WENATCHEE – 98801, 98802, 98807	41%	346
LEAVENWORTH – 98826, 98847	20%	172
CHELAN – 98816, 98817, 98831	20%	171
CASHMERE - 98815 + MANSON – 98831 + MALAGA – 98828 + ENTIAT – 98822 + PESHASTIN – 98847 + MONITOR – 98836 + ANOTHER CITY/ZIP	19%	158
NET	100%	847

S5. In what city or zip code do you currently receive services from Chelan PUD?

SUMMARY

Filter: QYear is 2024; sample size = 847; 41% filtered out

Residential Customer Demographics

A demographic snapshot of the representative sample of residential customers in this study. (gender, age, race, time in county, region)

	%
MALE	51%
FEMALE	47%
OTHER	0%
REFUSED	2%
NET	100%

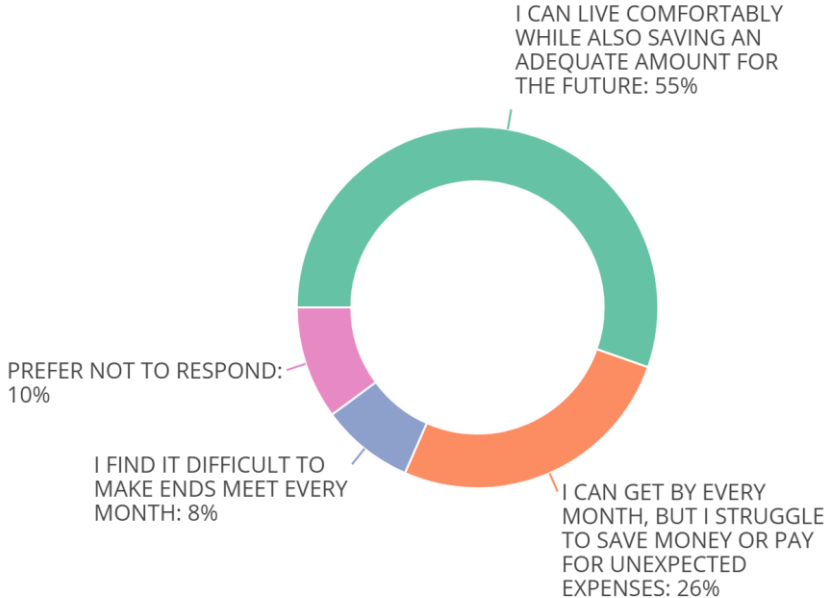
	%
18 TO 34	7%
35 TO 49	23%
50 TO 64	27%
65 AND OLDER	43%
NET	100%

	%
WHITE / CAUCASIAN	66%
HISPANIC / LATINO	28%
BLACK / AFRICAN AMERICAN	0%
NATIVE AMERICAN / ALASKA NATIVE	1%
ASIAN / PACIFIC ISLANDER	1%
MIXED RACE / MULTI-RACIAL	0%
PREFER NOT TO RESPOND	4%
NET	100%

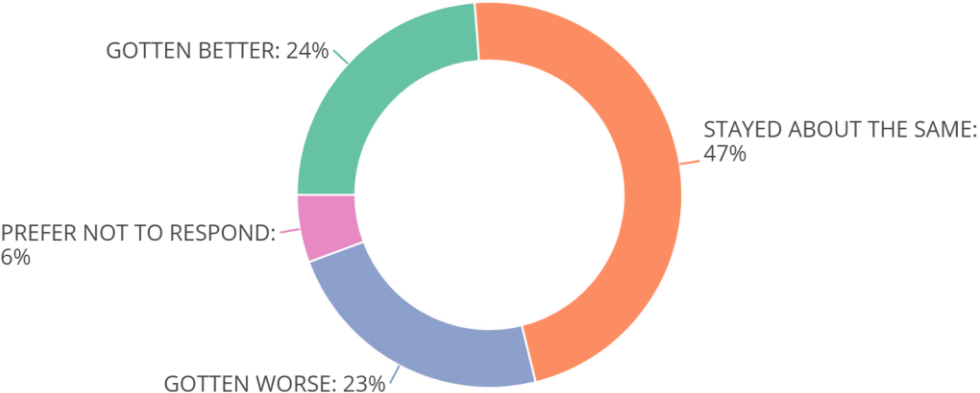
	%
FULL-TIME RESIDENT	82%
PART-TIME RESIDENT	16%
PREFER NOT TO RESPOND	1%
NET	100%

Residential Customer Demographics

About half of our respondents (55%) indicated they can live comfortably, while the remainder indicated that they either get by, or find it difficult to make ends meet. 47% indicate their financial situation is stable, while 23% indicate it has gotten worse, and the same amount indicate it has gotten better.



D6. Which of the following best describes your own personal financial situation? Is it . . . ?
 SUMMARY
 Filter: QYear is 2024; Weight: Weight: 2024 Sample to Race by Census; sample size = 847; effective sample size = 483 (57%); 41% filtered out; 95% confidence level



D7. Over the past two years, would you say that your own personal financial situation has gotten better, gotten worse, or stayed about the same? SUMMARY
 Filter: QYear is 2024; Weight: Weight: 2024 Sample to Race by Census; sample size = 847; effective sample size = 505 (60%); 41% filtered out; 95% confidence level

Chelan PUD - Summary of Key Findings

Overall satisfaction with Chelan PUD increased from 2022 efforts to **4.54 out of 5 overall**, from 4.46 out of 5 overall.

- This increase is driven by a **statistically relevant increase among those who rated the PUD a "5 of 5"**.
- Part-time PUD residents were more likely to rate the PUD higher than full-time residents.

Satisfaction with other measurements showed little or no changes from previous efforts.

- Customers are **highly satisfied with the overall reliability of electric service** with an unchanged rating of 4.66 out of 5.
- When compared to reliability, satisfaction with communications scores a very good with customers, at a score of 4.39 out of 5, a slight decrease from 2022, but not statistically significant.
 - Among communications metrics, **customers indicate that the PUD is doing best at communicating about outages** (4.55 out 5) and performing as expected on monthly bill, ways to manage their accounts, and ways to save money and energy efficiency (4.26-4.31 out of 5).
 - **Scores on satisfaction with communications on their monthly bills dropped from 4.49 to 4.31** in 2024 efforts, likely due to continued fallout from billing mishaps that occurred in early 2024; likely this score will remedy in 2026 data collection efforts.

Chelan PUD - Summary of Key Findings

Satisfaction with other measurements showed little or no changes from previous efforts.

- Among tests of how well customers feel the PUD is meeting its Mission, Vision, and Value statements we find that **customers agree most with the PUD fulfilling its Mission**: Enhancing the quality of life in Chelan County by providing sustainable, reliable utility services with a score of 4.58 out of 5.
 - **Value statements** were new tests in this 2024 evaluation, and the **results indicate some confusion among respondents over the value of stewardship, and safety** with 7% responding "don't know" to each of these tests. Opportunity could exist on communicating how these values are put into action by the PUD to raise awareness among PUD customers.
- Cross-comparing all measurements, we find that **many measurements score at, or around 4.5 out of 5, indicating customers have a very high satisfaction overall with the PUDs services.**
 - **"Providing ways to save money on electric bills and become more energy efficient"** was the poorest performing measurement collected and **offers an opportunity for teams to continue to educate and improve on billing and energy efficiency to raise customer satisfaction.**
 - We find **key drivers** that affect overall satisfaction on include customers **monthly bill**, and **operational excellence**. These two measurements have the strongest direct effect on our total satisfaction measurement.

Wildfire risk was included as a new measurement in 2024. Our results suggest that **most customers (72.71%) feel that there is "High" or "Somewhat High" risk of wildfires in Chelan County.**

- Opinions differ based on homeownership, **renters are 13% less likely to indicate "High risk"** than homeowners, indicating that homeowners show a higher concern about wildfire risk than other segments served.

Customers were also asked their preparedness if a temporary shutoff of services was performed to avoid new wildfire ignitions. **Preparedness among respondents was mixed, with many (38.61%) indicating that they felt "Moderately prepared".**

- We find a similar number of those who indicate they are either "4 or 5" (34.65%) on our prepared score and a "1 or 2" (26.74%). The population is **truly mixed in preparedness, from not at all to completely prepared.**
 - Many respondents will over-represent their preparedness at a question like this due to acceptance bias, so the higher ratings should be regarded as slightly false positive.
- **Hispanics**, more often than others, **were more likely to respond with a "1 or 2" in their preparedness rating**, offering an opportunity for the PUD teams to reach out to these communities and ensure they are prepared for any temporary shutoffs that may occur.

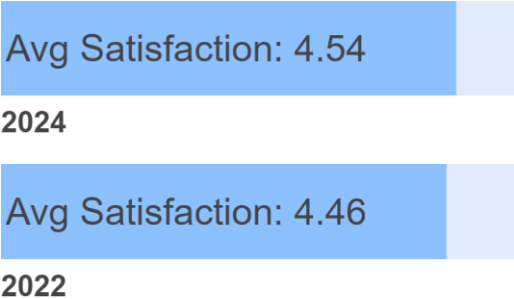
Chelan PUD - Summary of Key Findings

Thinking of communications opportunities, respondents indicate they get most of their news about the PUD from the Connected Customer Newsletter (74.63%), followed by the PUD's website (31.28%), and stories in the newspaper (22.34%) and social media (20.08%).

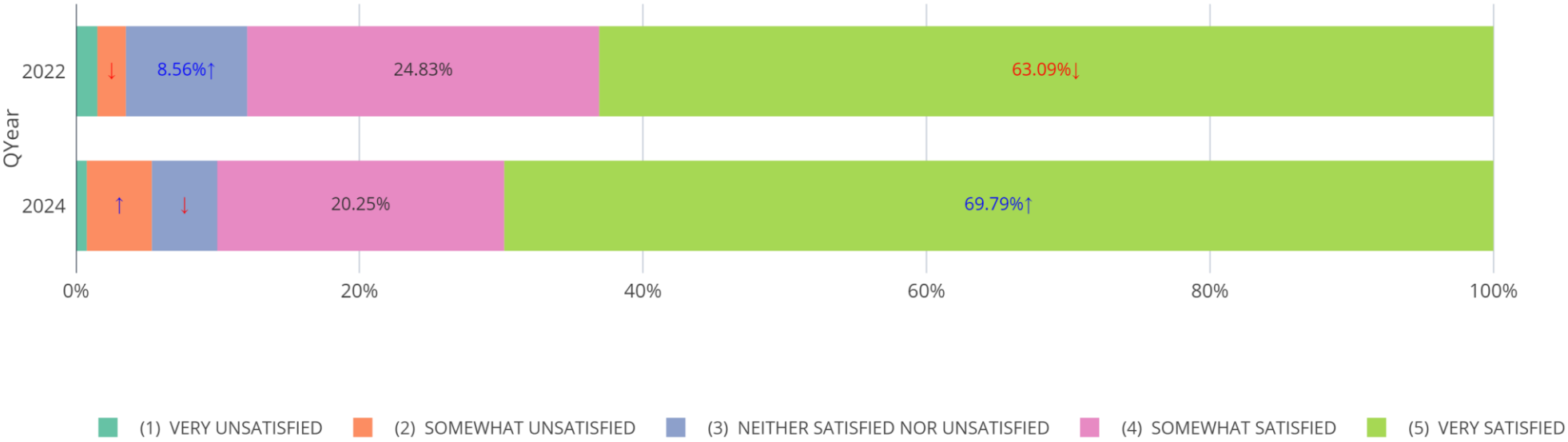
- Those **65 and older** were more likely to suggest the **newsletter and local news as their news source**.
- **Social media** was indicated as a major news source for those **18 to 34, and those aged 50 to 64**.
- The **website** was indicated as a **news source for all age segments** at a similar rate.

Executive Review - Overall Satisfaction with the PUD

Overall Satisfaction with Chelan PUD is a continued and ongoing measurement for the PUD. **Year over year results indicate that this score continues to grow from 2020**, while not statistically significant growth, this growth from 4.46 to 4.54 is promising given 2020 and 2022 scores remained flat at this measurement (4.47 in 2020 and 4.46 in 2022). **69.79% of respondents rated the PUD a "5", very satisfied.**

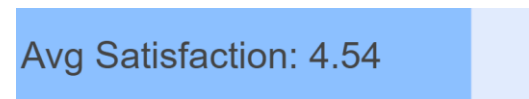


The increase in satisfaction is seen among a statistically significant increase of those rating their satisfaction a "5" than in 2022, as well as a decrease in those rating "3", "2" or "1".

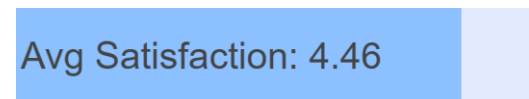


Executive Review - Overall Satisfaction with the PUD

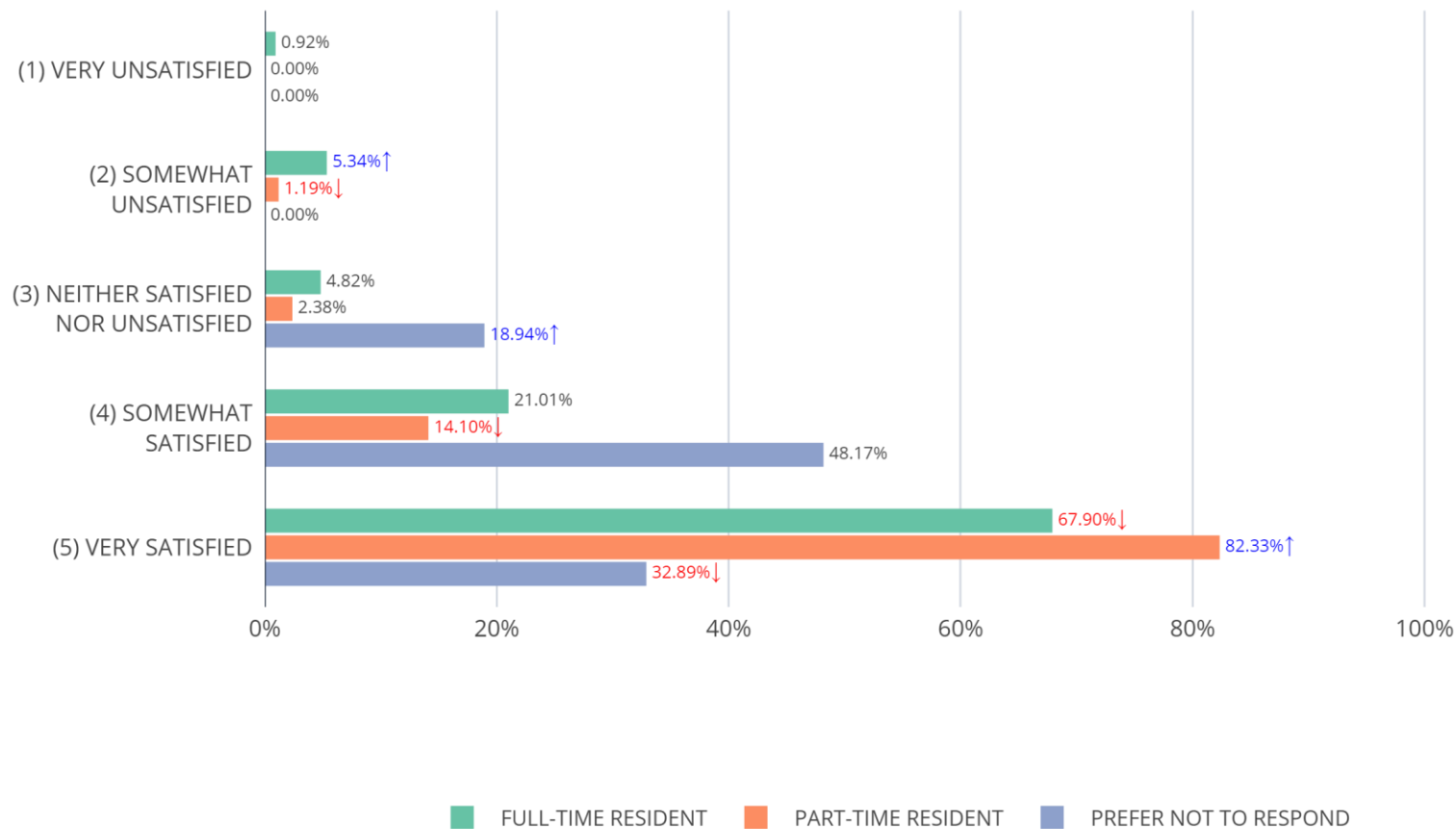
Markedly, **part-time Chelan County residents were statistically more likely to rate the PUD at "5"** than those who were full-time residents. Full-time residents also included more those with unsatisfied opinions than the part-time resident segment.



2024



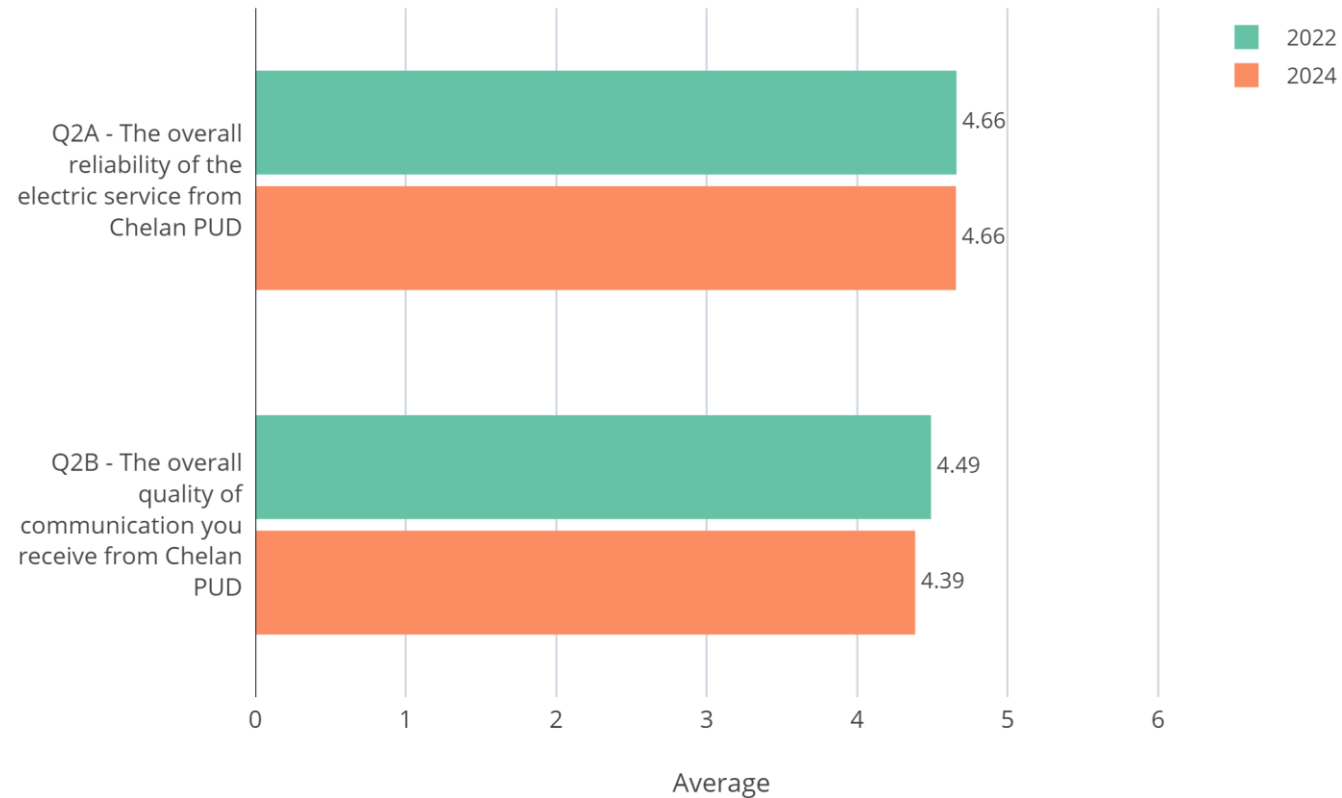
2022



Executive Review - Satisfaction with the Reliability of the PUD's Services and the Quality of Communication Received from Chelan PUD

Reliability is a key measurement for utilities as it often ties directly to customer satisfaction, and also general public opinion.

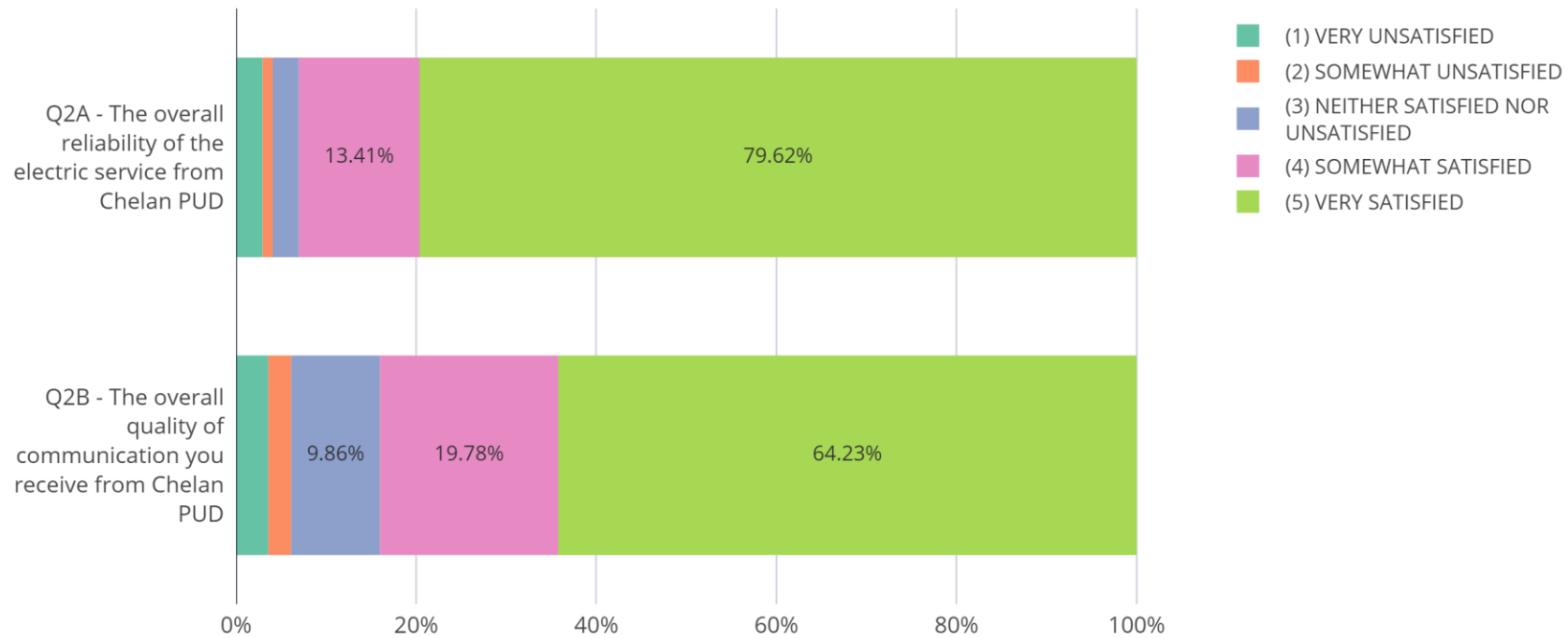
Average ratings on reliability for the electric service remained stable between 2022 and 2024 with no change in score, and the reported score from respondents on overall quality of communications decreased slightly year over year from 4.49 to 4.39.



Executive Review - Satisfaction with the Reliability of the PUD's Services and the Quality of Communication Received from Chelan PUD

The **lower average reported for quality of communication is driven by a middling of ratings** with communication reporting a higher rate of "3" and "4" ratings from respondents than "5"s.

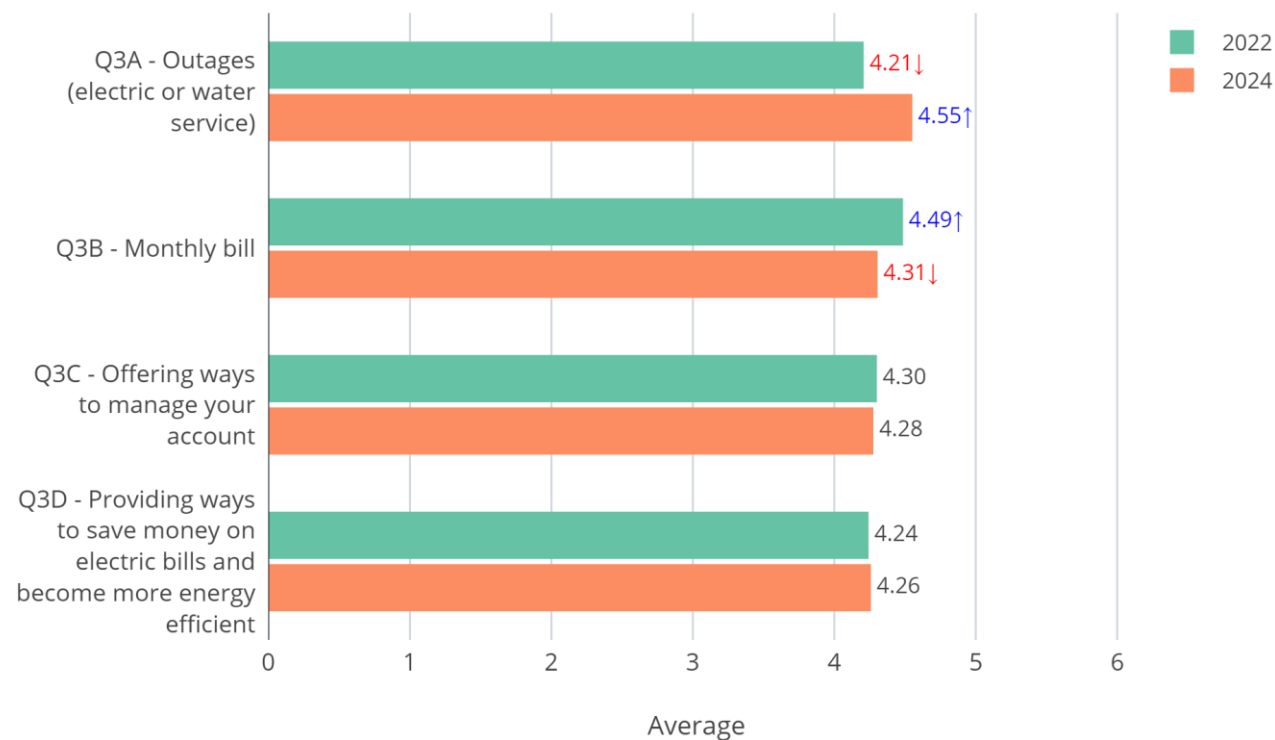
These results suggest there is **opportunity to improve the quality of communication** with customers to help raise their satisfaction on communications practices.



Executive Review - Satisfaction with how Chelan PUD is communicating with customers on specific topics

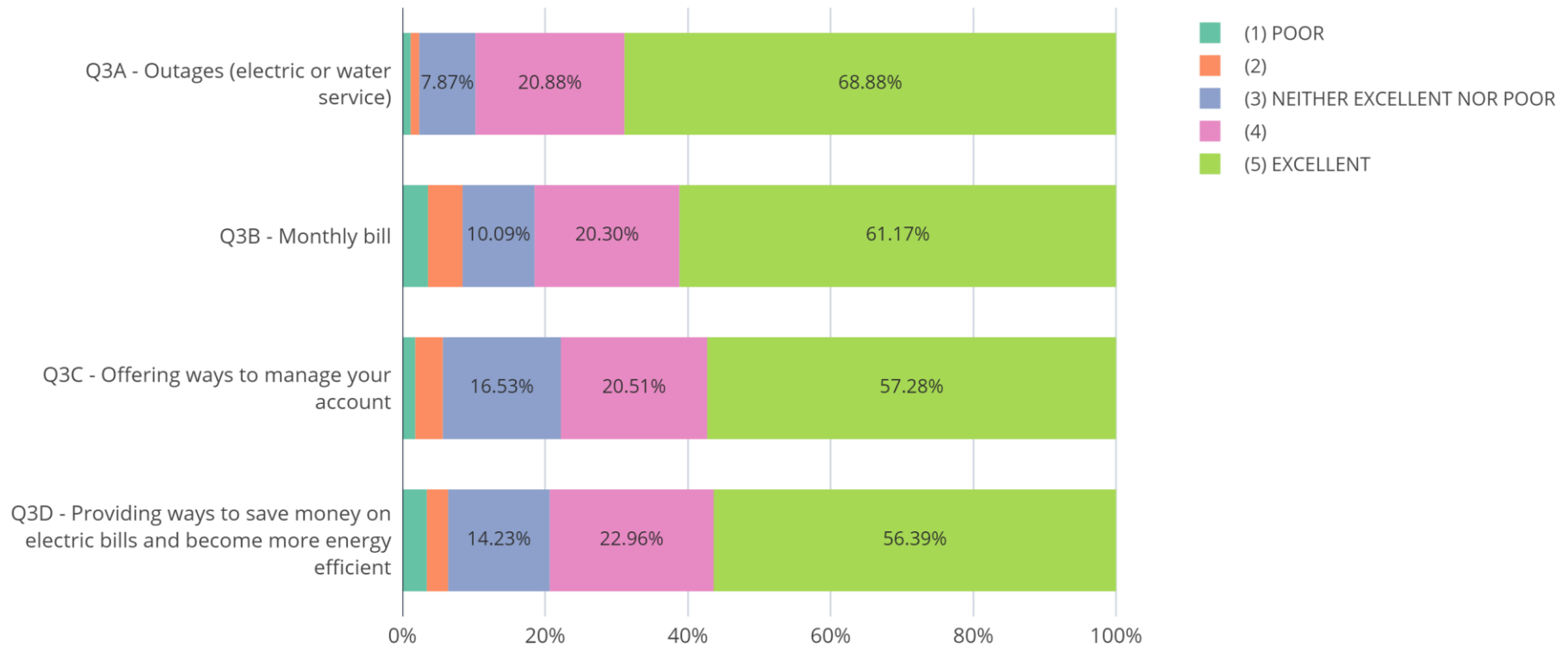
Building on opportunities to increase customer satisfaction with communications from Chelan PUD, we find that in our 2024 data collection that **respondents felt that communication about outages has increased in quality by .34, while communications regarding billing has decreased .18.**

Likely this decrease in satisfaction with billing is related to concerns and communications regarding the billing issues experienced in early 2024 and will resolve itself in future iterations of this research as the issue has been resolved by PUD teams.



Executive Review - Satisfaction with how Chelan PUD is communicating with customers on specific topics

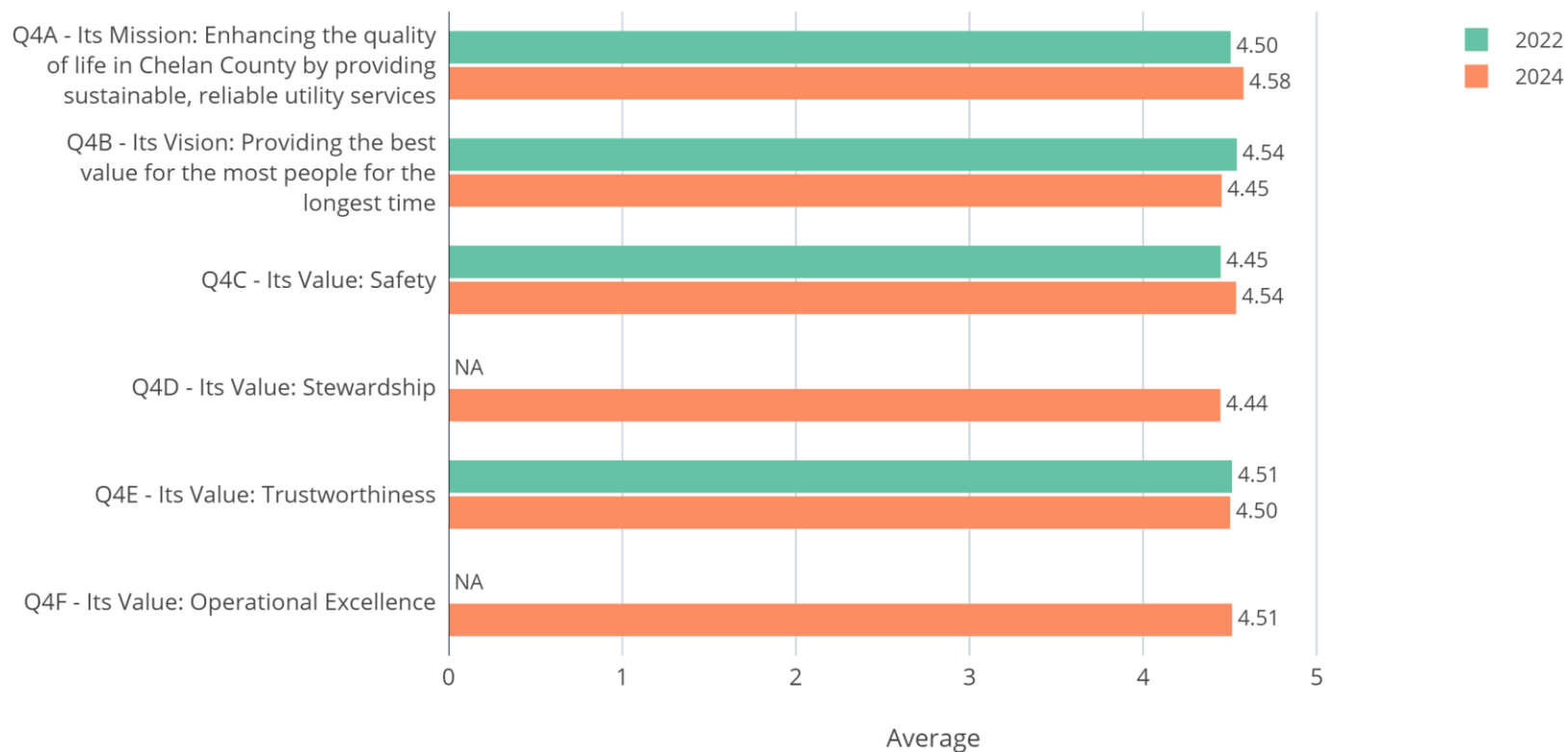
The high rating for outages is driven by a higher instance of those rating communication about outages as a "5" than other communications measurements.



Executive Review - Agreements with how the PUD is fulfilling its Mission, Vision, and Value statements

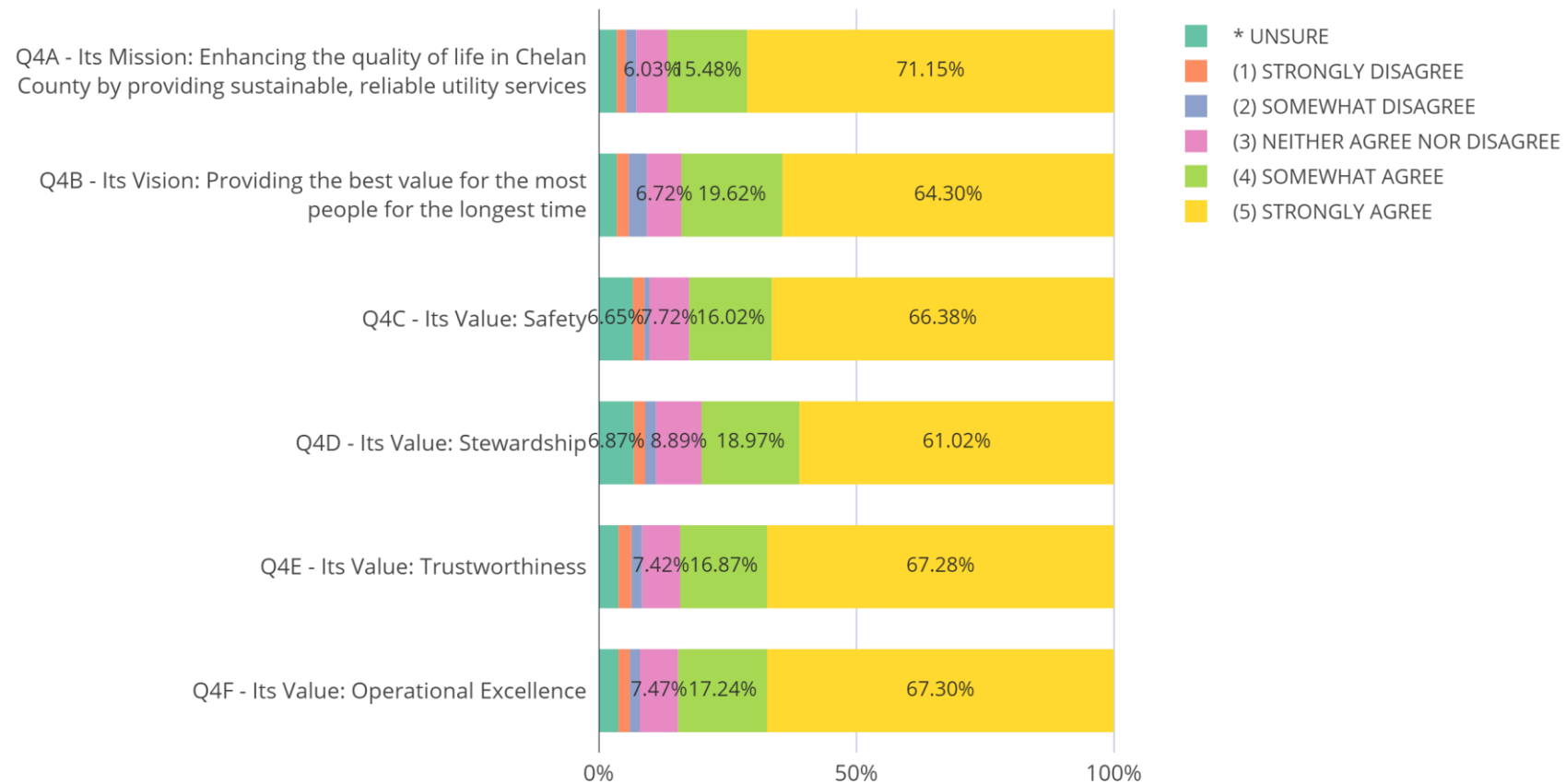
Most measurements regarding customers agreement with how well the PUD is fulfilling its Mission, Vision and Value statements **average at 4.5 out of 5, with no statistically significant differences** among previously measured metrics year over year.

Among the measurements, respondents were most likely to strongly agree with "Its Mission", with 71.15% selecting "5 - Strongly Agree".



Executive Review - Agreements with how the PUD is fulfilling its Mission, Vision, and Value statements

The **measurements with the lowest instance of "5" ratings also had a high instance of "Unsure" ratings**, which indicates confusion from customers as to what this value, vision, or mission statement relates to the PUD.



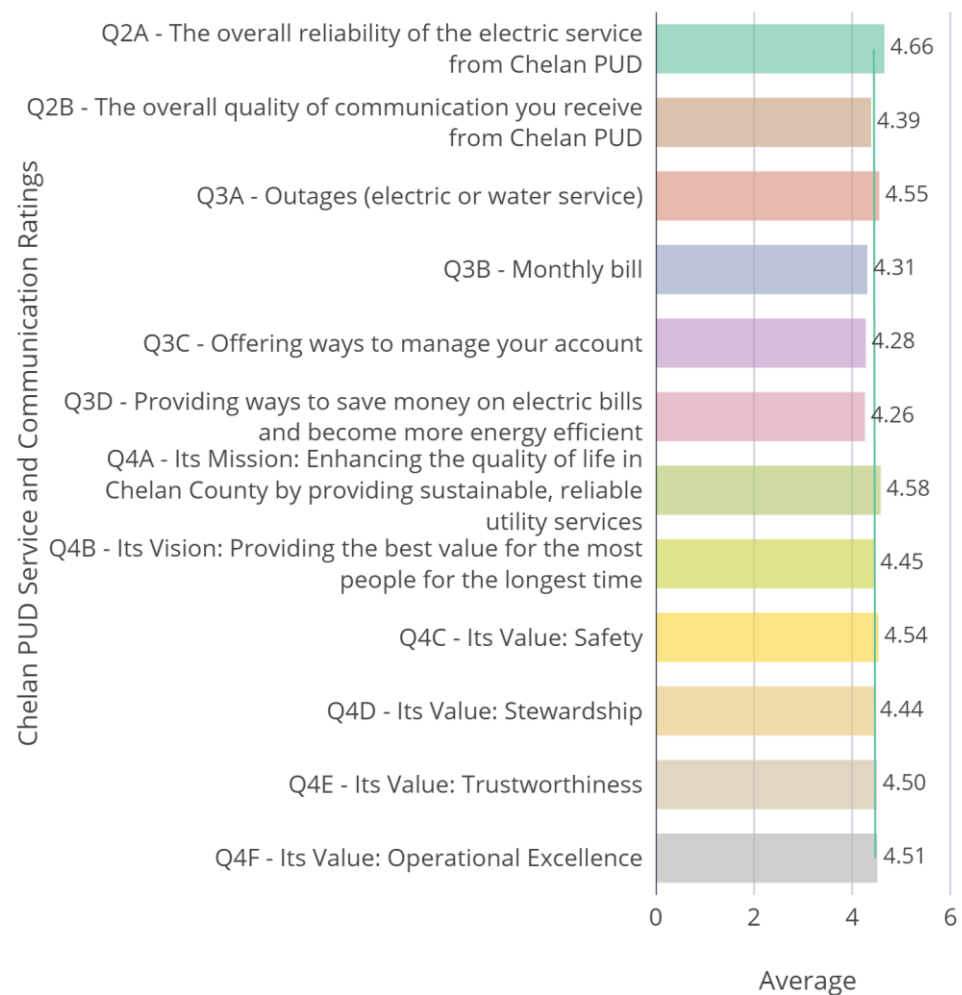
Executive Review - Satisfaction with key measurements

Satisfaction ratings on most measurements tested in our study illustrate that Chelan PUD customers are "Very" or "Somewhat" satisfied among all of the measurements we test.

The PUD performs best on "The overall reliability of the electric service from Chelan PUD" with a score of 4.66 out of 5 on satisfaction by respondents.

The lowest performing measurements by average score were "Providing ways to save money on electric bills and become more energy efficient" and "Offering ways to manage your account" which scored 4.26 out of 5 and 4.28 out of 5 among respondents.

These two lower performing measurements can often be positively influenced through communication and education campaigns, which also relates to a lower rating of communications versus reliability among general satisfaction ratings.



Driver Analysis - What Satisfaction Measurements Currently Affect Satisfaction?

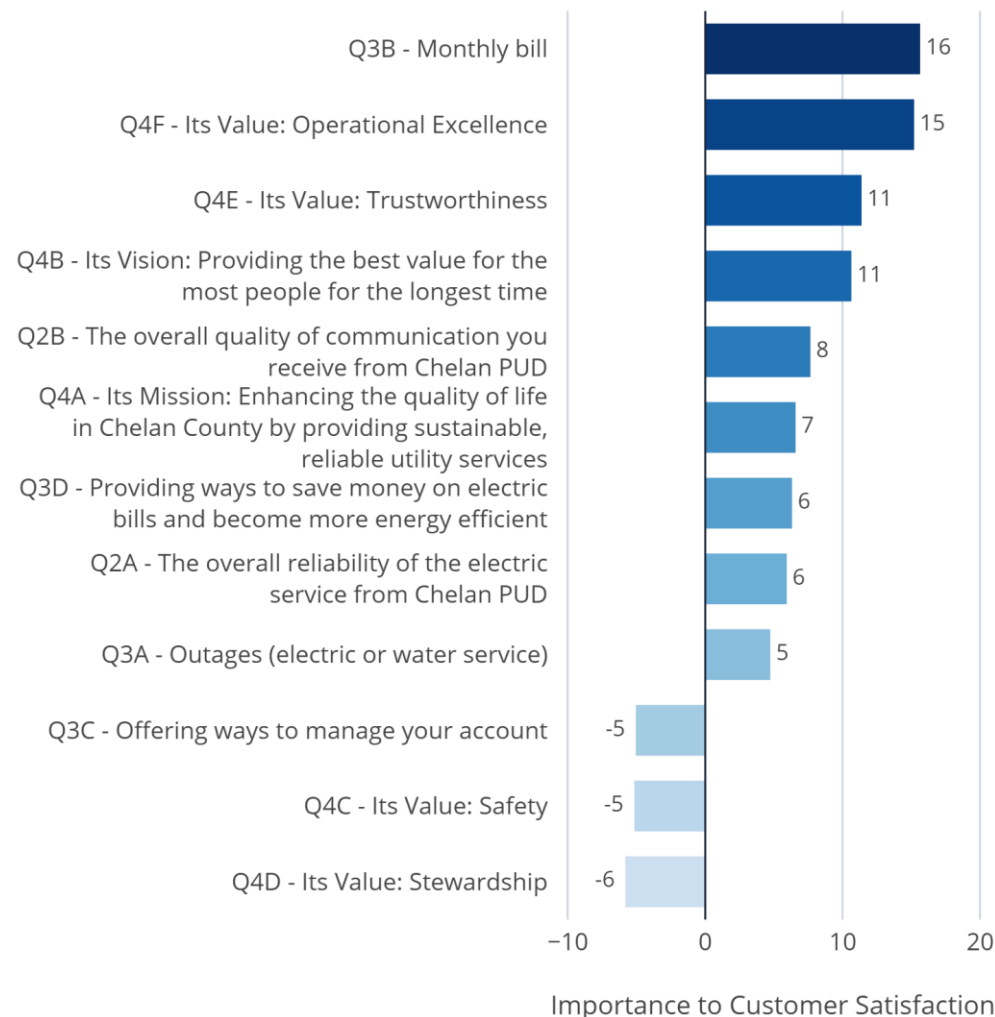
When understanding overall satisfaction with services, we often find that contributing factors can have a direct impact on negative and positive experiences among customer segments.

We find that **while customers are increasing in their overall satisfaction**, two key measurements are **most likely to have a direct effect** on overall customer satisfaction among Chelan PUD's population.

Changes to monthly bills is indicated as having the strongest effect on satisfaction among respondents, as well as **maintaining and showcasing how the PUD is living up to its value of operational excellence**.

Outages is reported as having less of an impact on **satisfaction**, but we must understand that this rating is based on the knowledge that many customers find the PUD's service highly reliable, and do not expect to experience outages. **If outages were to occur, it would show has having a higher impact on satisfaction than presented in these results**.

We find the **values of Safety and Stewardship, and offering ways to manage your account to be confusing to respondents**, which is illustrated in the negative score for each of these 3 measurements.

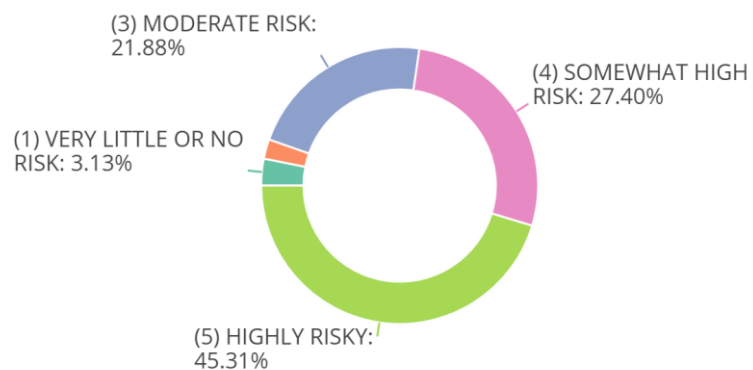


Executive Review - Customer's opinions on wildfire risk

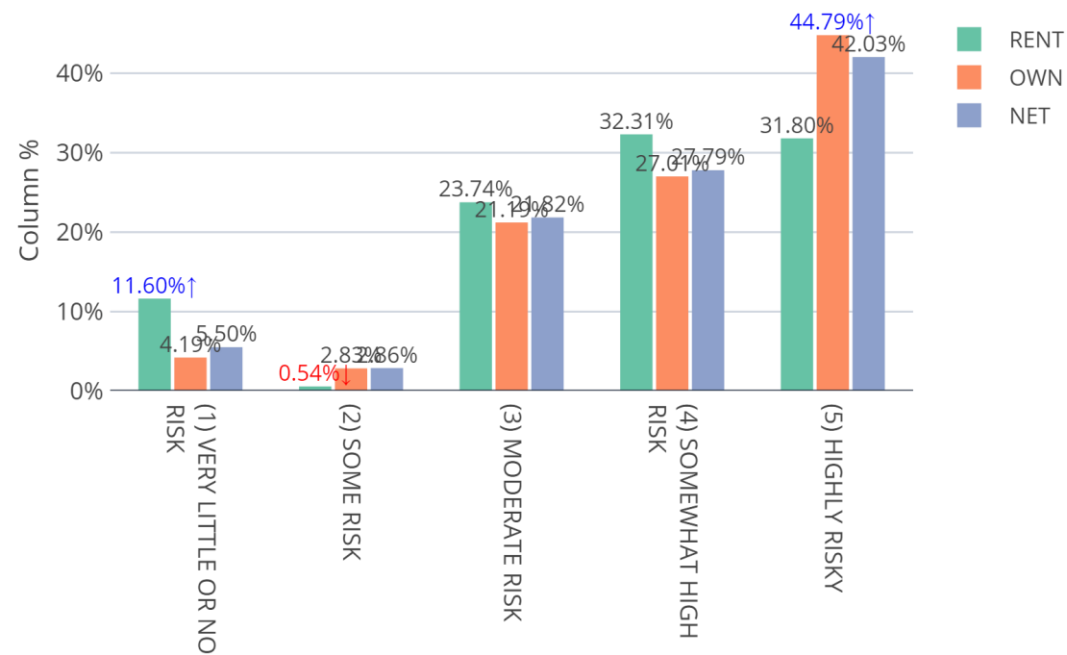
72.71% of respondents indicated that they felt there was **"High" or "Somewhat High" risk of wildfires in Chelan County**. Very few (8%) felt that the risk was low.

We find that **concerns about wildfire risk are higher among homeowners**, who were 13% (12.99%) more likely to indicate "Highly Risky" than renters.

Opinion on Wildfire Risk



Opinion on Wildfire Risk

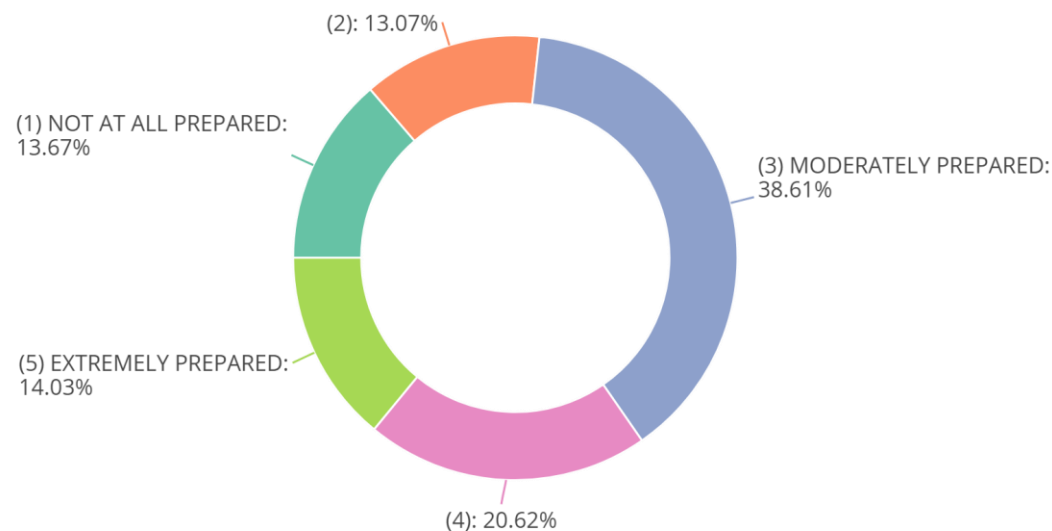
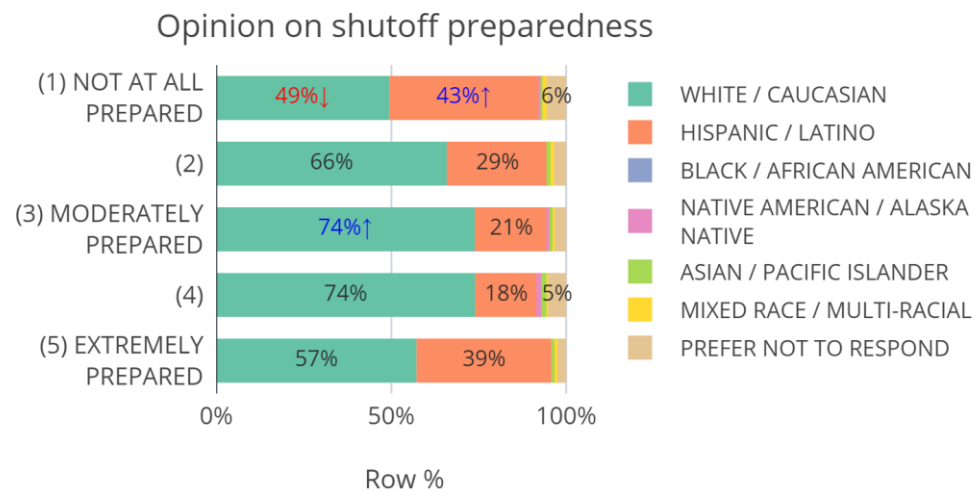


Executive Review - Customer's opinions on temporary shutoff policies

Respondents were **most likely to indicate that they felt they are "Moderately prepared" for a temporary shutoff** during extreme fire weather to avoid new wildfire ignitions. We observe about the same rate (14%) of those who indicate either "1 - Not at all prepared" and "5 - Extremely prepared".

Among those who indicated "1 - Not at all prepared" we find that **Hispanics are much more likely to indicate not at all prepared than other race or ethnic identities**. Specific outreach to these populations could have a positive impact on preparedness across the County, as well as focusing on educating all about preparedness to move their comfort from a "3" to a "4".

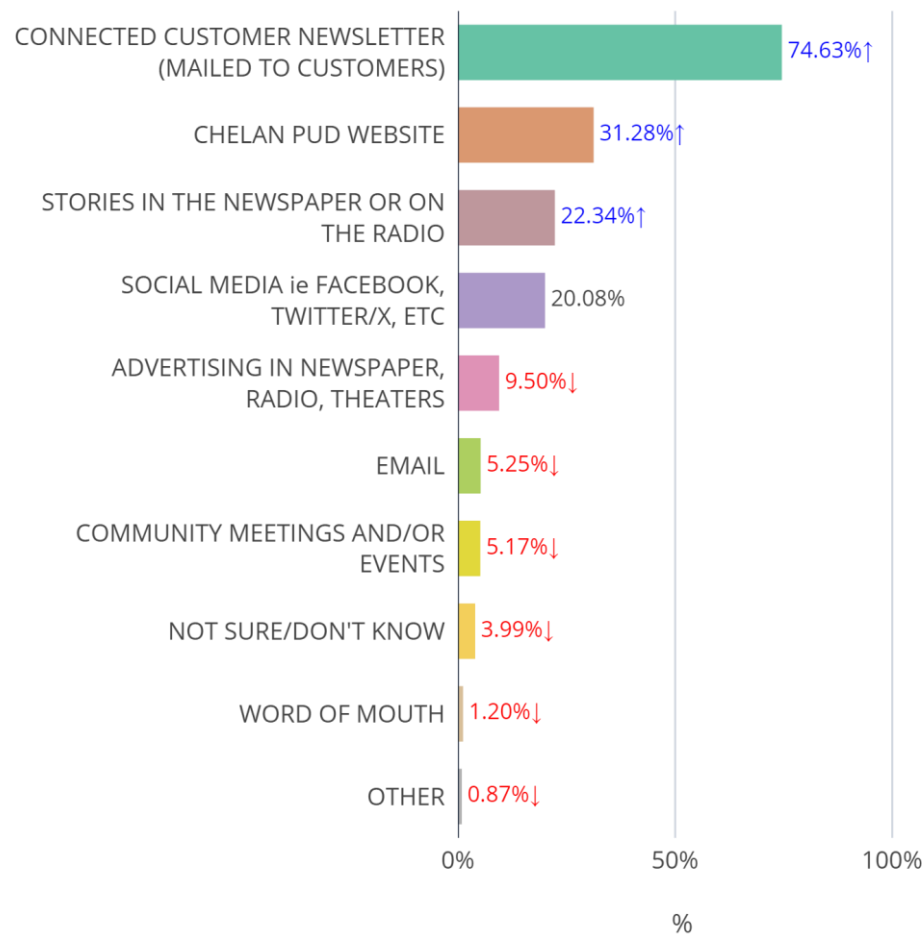
Opinion on shutoff preparedness



Executive Review - Where Customers Get their News

Respondents were most likely to indicate that they receive news and updates about the Chelan PUD from the **Connected Customer Newsletter (74.63%)** above all other means. This use is driven by a statistically high segment of those aged 65 and older who reference this most often.

The **website is a good second resource for them (31.28%)** as well as stories in the newspaper, and social media. **Younger populations are less likely to mention the newspaper than others.**



S2. What is your current age?

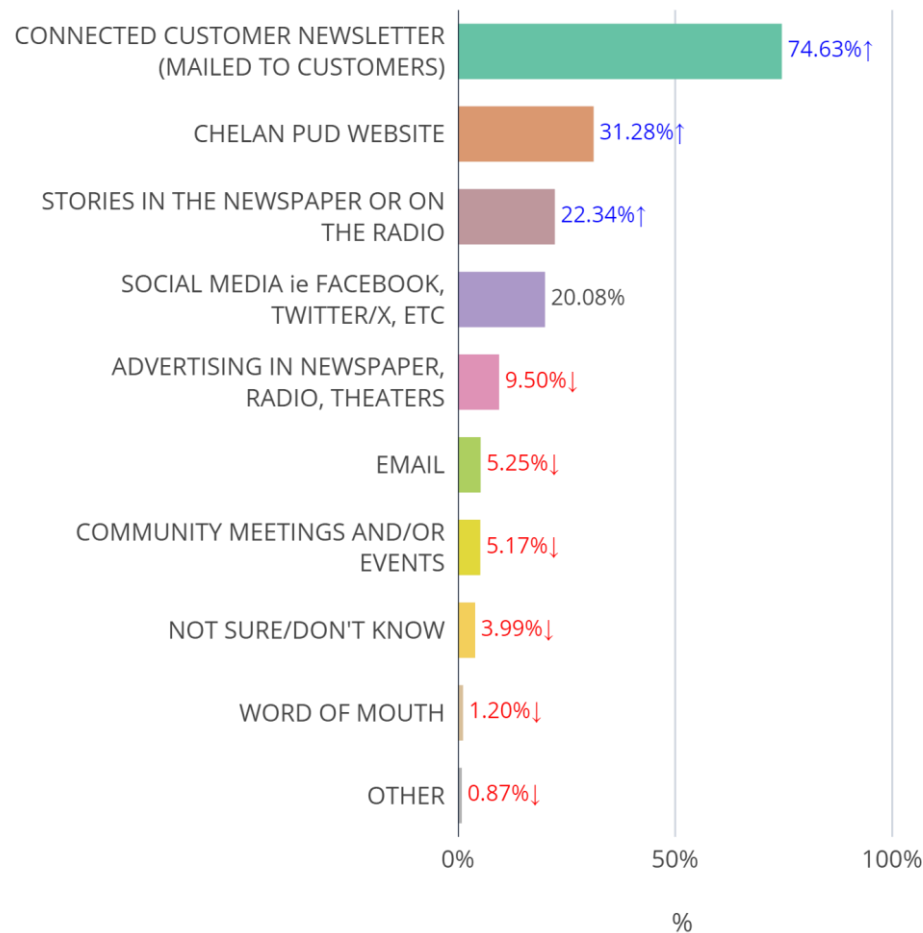
	18 TO 34	35 TO 49	50 TO 64	65 AND OLDER
CONNECTED CUSTOMER NEWSLETTER (MAILED TO CUSTOMERS)	48.77%↓	65.56%↓	76.45%	82.76%↑
STORIES IN THE NEWSPAPER OR ON THE RADIO	14.20%	11.28%↓	18.62%	31.79%↑
ADVERTISING IN NEWSPAPER, RADIO, THEATERS	1.19%↓	9.12%	7.11%	12.49%↑
COMMUNITY MEETINGS AND/OR EVENTS	1.77%	6.81%	2.53%↓	6.58%
CHELAN PUD WEBSITE	33.46%	32.13%	32.12%	29.68%
SOCIAL MEDIA ie FACEBOOK, TWITTER/X, ETC	31.46%	19.12%	20.37%	18.03%
EMAIL	1.37%	6.45%	8.30%↑	3.24%↓
WORD OF MOUTH	.00%	1.07%	.72%	1.78%
OTHER	.00%	.41%	.72%	1.37%
NOT SURE/DON'T KNOW	9.31%	7.59%	3.24%	1.63%↓

re do you currently get news and updates about Chelan PUD?

Executive Review - Where Customers Get their News

Respondents were most likely to indicate that they receive news and updates about the Chelan PUD from the **Connected Customer Newsletter (74.63%)** above all other means. This use is driven by a statistically high segment of those aged 65 and older who reference this most often.

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How do you currently get news and updates about Chelan PUD?