



MEMORANDUM

EUGENE WATER & ELECTRIC BOARD

Rely on us.

TO: Commissioners Mital, Simpson, Brown, Helgeson and Manning
FROM: Lance Robertson, Public Affairs Manager; and Monica Showlin, Marketing & Creative Services Supervisor
DATE: October 23, 2014
SUBJECT: 2015 Customer Satisfaction Survey Results
OBJECTIVE: Information Only

Attached is a report summary of our annual customer satisfaction survey, once again conducted by Riley Research Associates of Portland.

A total of 1,109 randomly-sampled residential EWEB customers completed or partially completed interviews (816 online and 293 by phone) for a response rate of about 16%, an increase of 2% from 2014. Customer respondent characteristics are detailed in the report.

There are a few important points to note when reviewing the 2015 survey results:

First, overall customer satisfaction with EWEB service remains very high: 7.9 on a 10-point scale, compared to 7.7 last year. Riley Research noted that “Satisfaction has largely remained comparable over the past three years, though there have been some notable improvements. Customer satisfaction has significantly improved for *responsiveness to customer needs and concerns* and *efforts to control costs*, and appears to be on an upwards trend for both *water conservation programs* and *energy conservation programs*.”

About one-quarter of survey respondents had contacted EWEB in the past six months, down from about one-third of respondents in 2013 and 2014. Top reasons for contacting EWEB are to start/stop/change service, billing questions, make a payment and power outages. Those contacting EWEB to report a power outage decreased from 17% in September 2014 (which included a significant snowstorm in February) to 10% in September 2015.

Secondly, we made a few changes to the survey questionnaire. While the majority of questions remain the same to preserve the ability to benchmark customer satisfaction and better understand customer priorities, the 2015 questionnaire also was revised to reflect emerging and current issues, including: interest in electric vehicles, rooftop solar power systems and community solar. In 2014, we introduced questions about alternate water source planning, the value of public power, current usage of and likelihood to add natural gas services, and interest in potential technology-enabled services and pricing plans, all of which we included again in the 2015 questionnaire.

Here are just a few more high-level results:

- Reliability and our core business functions remain extremely high, both in customer satisfaction and perceived importance. Customer respondents had the highest satisfaction with drinking water quality

and water and electric service reliability, which received average ratings between 8.3 and 8.8 on a 10-point scale.

- Customer satisfaction has significantly improved for *responsiveness to customers' needs and concerns*, moving from 7.3 in 2014 to 7.6 in 2015, and for *efforts to control costs*, which moved from 5.7 in 2014 to 6.0 in 2015.
- EWEB's plans to diversify and add alternate water sources was considered very important by most customers (88% felt it was important to do so, including 59% who felt it was *very important*); however, only 28% were familiar with any of EWEB's current plans to do so.
- The value of public power: As in 2014, nearly two-thirds of EWEB customers considered a public utility to be more valuable than a private utility (64%), including nearly half who felt it was *much more valuable*.
- Modernization efforts: About half of respondents were familiar with advanced meters (51%), a decrease of 6% from 2014. This included 13% who considered themselves to be *very familiar*. An increasing proportion of customers have a favorable opinion of "smart" meters, with 62% indicating some level of favorability in 2015, compared to 53% in 2014.

A higher proportion of respondents indicated that each feature or service made possible with more modern metering technology was either very or somewhat valuable in 2015 than in 2014. The most valuable features or services continue to be *water leak* and *electric outage detection*. Aspects that received the highest increase in value were *access to account information and outages through smartphones and apps*, *pricing programs*, and *pre-pay options*.

- EWEB's involvement in solar programs was considered important by a majority of customers, and about half indicated interest in participating themselves. However, most (65%) are unaware of EWEB's current participation and support of solar power projects.

While a vast majority of customers were unfamiliar with Community Solar projects (76%), about three-quarters still felt that it was important for EWEB to participate in such a program (73%), and nearly half were interested in participating themselves (46%).

- Three-quarters of customers do not have an electric or hybrid vehicle, nor do they have plans to get one in the next few years (75%). Of the remaining respondents, 9% currently have one, and 9% have plans to get one.

Once you've had a chance to review the report summary, please let us know if you have any questions or whether we can be of further assistance in your understanding of the results and implications for action. The full report also includes verbatim responses to open-ended questions and cross-tabulations, which are available upon request (note: these are large electronic files). Please contact either of us via email with questions.

These results also will be posted on EWEB's internal network, and will be shared with employees via an article and link in The Daily News.



CUSTOMER SURVEY

REPORT SUMMARY

SEPTEMBER 2015

Michael J Riley & Crystal Bolyard
Riley Research Associates

RESEARCH | INSIGHT | KNOWLEDGE

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KEY TAKEAWAYS

Riley Research Associates conducted a survey of Eugene Water & Electric Board (EWEB customers) to gauge levels of satisfaction, priorities, perceptions of various EWEB programs, and communication preferences. The survey was conducted both online and by phone.

Satisfaction and Importance

- ❏ Customer ratings for satisfaction are comparable to previous years, but appear to be on a general upwards trend, particularly for:
 - Responsiveness to needs
 - Efforts to control costs
 - Water conservation programs
 - Energy conservation programs
- ❏ In general, customers tended to have higher satisfaction ratings for issues regarding basic water and electric service, while satisfaction tended to be slightly lower for issues around EWEB's programs and customer communications. Likewise, importance ratings tended to be higher for basic water and electric service (along with water quality), while importance for programs and customer services was slightly lower.
- ❏ About one-fifth of customers were unable to provide satisfaction ratings for EWEB's conservation programs, efforts to protect the environment and drinking water sources, and its involvement in the community, indicating that many are possibly unfamiliar with many of EWEB's outreach and program efforts.
- ❏ Looking at the differences between satisfaction and importance, the greatest areas of opportunity exist for improving efforts to control costs, protection of drinking water sources, and responsiveness to customer needs and concerns.
- ❏ Customers were asked to name the most important issue facing their community, and while affordable electric and water rates wasn't one of the top responses, when probed further, about half felt that an affordable utility was either more important or the same importance as the other issues they named.

Smart Meters & Other Programs

- ❏ Customers are still learning about Smart Meters, but they appear to value the features they offer, and an increasing proportion is indicating favorability for the modernized meters.
 - Customers most value advanced leak and outage detection, while other benefits are not quite as important; the perceived value of each benefit increased significantly from 2014.
- ❏ EWEB's involvement in solar programs was considered important by a majority of customers, and about half indicated interest in participating themselves. However, most are unaware of EWEB's current participation and support of solar power projects.
- ❏ EWEB's plans to diversify and add alternate water sources was considered very important by most customers; however, few were familiar with any of EWEB's current plans to do so.

Communications

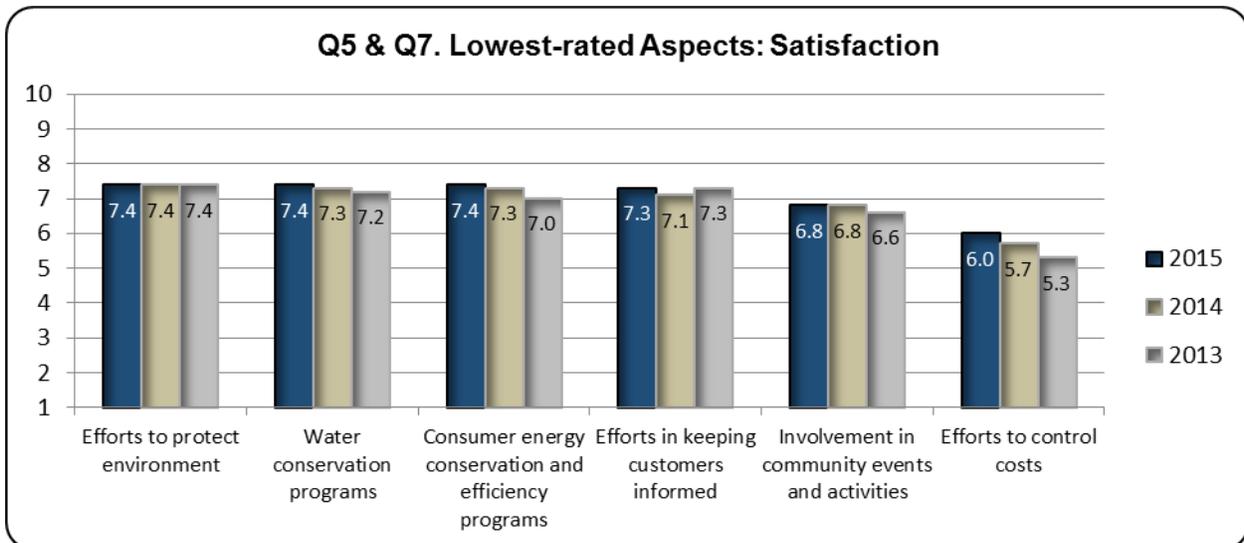
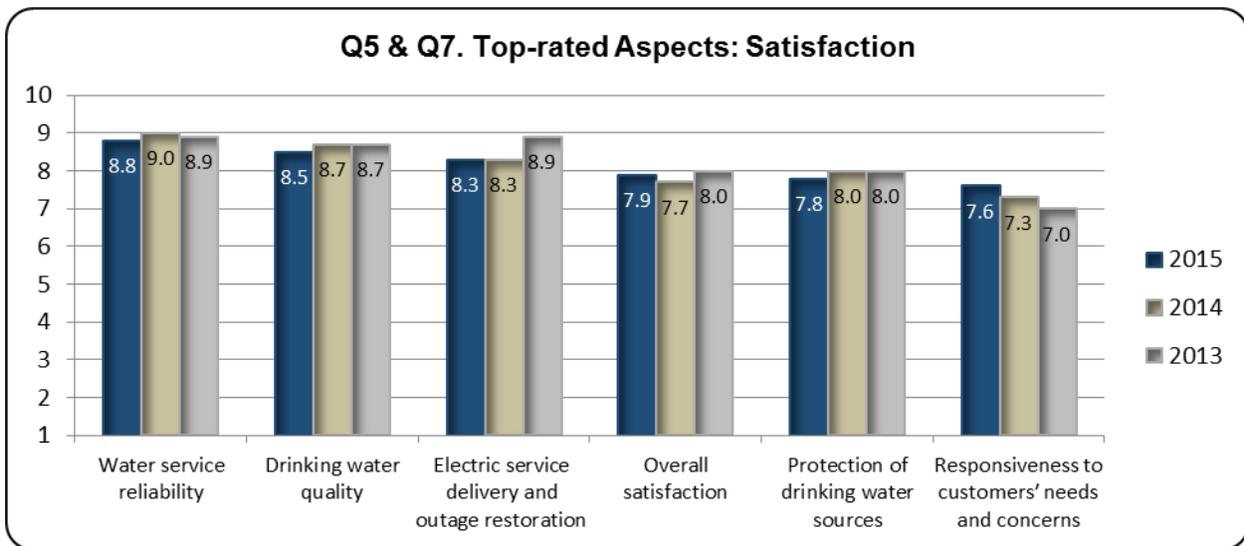
- ❏ Customers rely on a variety of sources to learn about and interact with EWEB, and most heavily rely on direct interactions, such as messages on their bills, bill inserts, emails, and text messages. They feel EWEB's communications are useful, and easy to understand.



EXECUTIVE OVERVIEW: SATISFACTION

- Satisfaction among customers continues to be moderate to high, with an overall satisfaction rating of 7.9 (on a scale where “10” is “very satisfied”).

 - Customer satisfaction was highest regarding water quality, reliability and protection efforts, as well as with the electric service.
 - Although satisfaction either increased from 2014 or remained comparable, satisfaction was still lowest for *efforts to control costs* and *involvement in community events*.
- Satisfaction has largely remained comparable over the past three years, though there have been some notable improvements. Customer satisfaction has significantly improved for *responsiveness to needs* and *efforts to control costs*, and appears to be on an upwards trend for both *water conservation programs* and *energy conservation programs*.

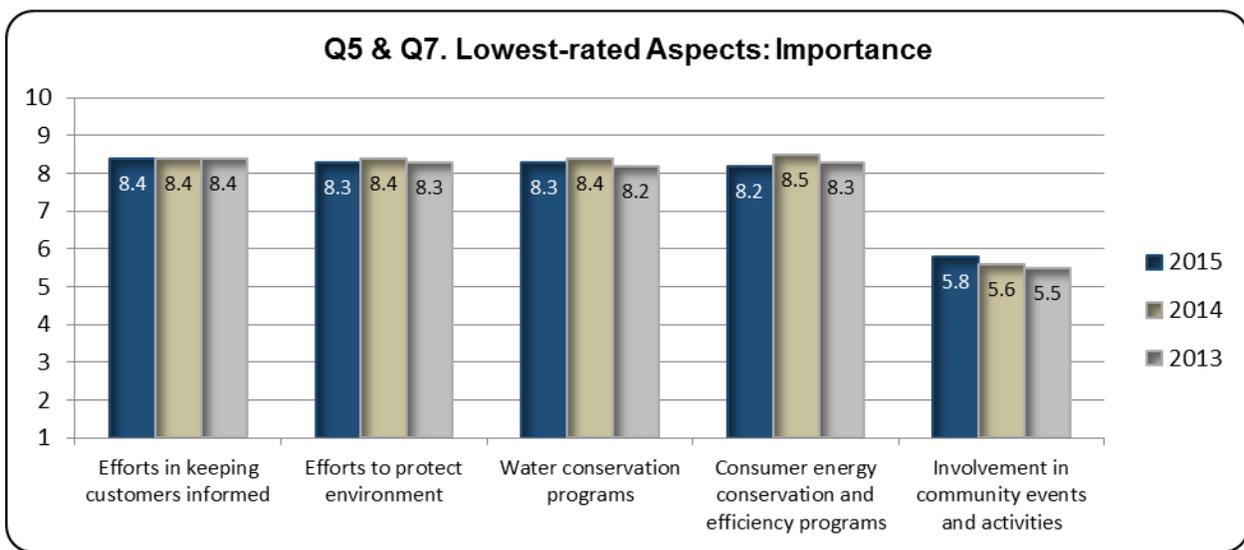
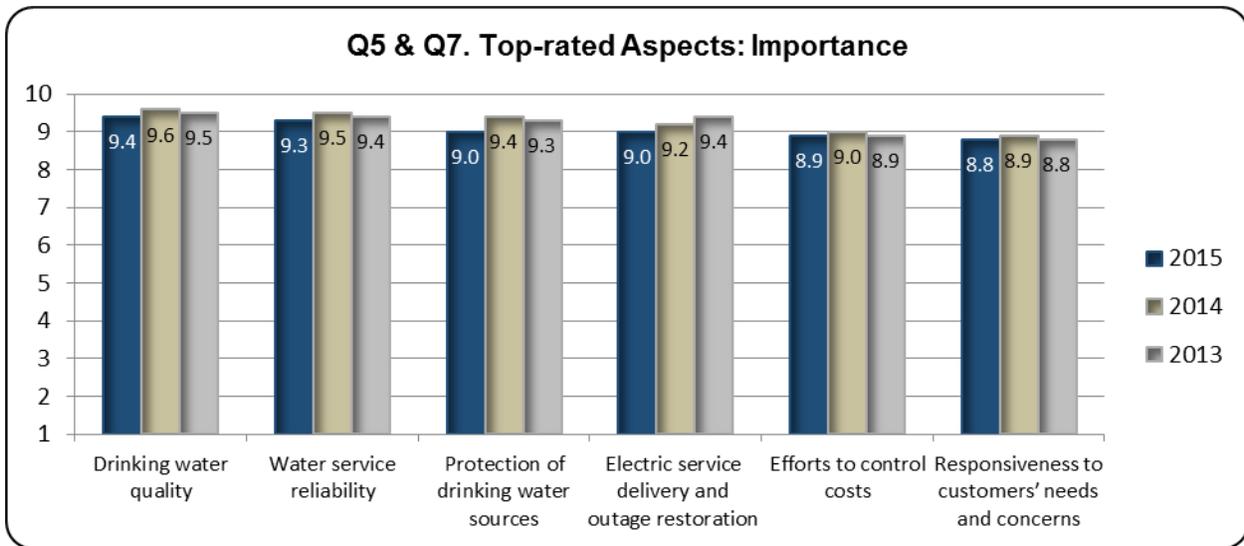




EXECUTIVE OVERVIEW: IMPORTANCE

- % Customers continue to rate the various aspects of EWEB's service highly, particularly *drinking water quality* and *water service reliability*.
 - Water service, including quality, reliability, and protection, was the most important issue for customers, along with electric service delivery. Issues around conservation and customer service, while still considered important, weren't quite as critical to customers.

- % Importance ratings largely remained comparable to the past years' results, with some notable differences. There were notable (though statistically insignificant) decreases for the importance of *protecting drinking water sources* and *consumer energy and efficiency programs*. There also appears to be a downwards trend for the *importance of electric service delivery*, and an upwards trend in regards to the importance of *EWEB's involvement in community activities*.

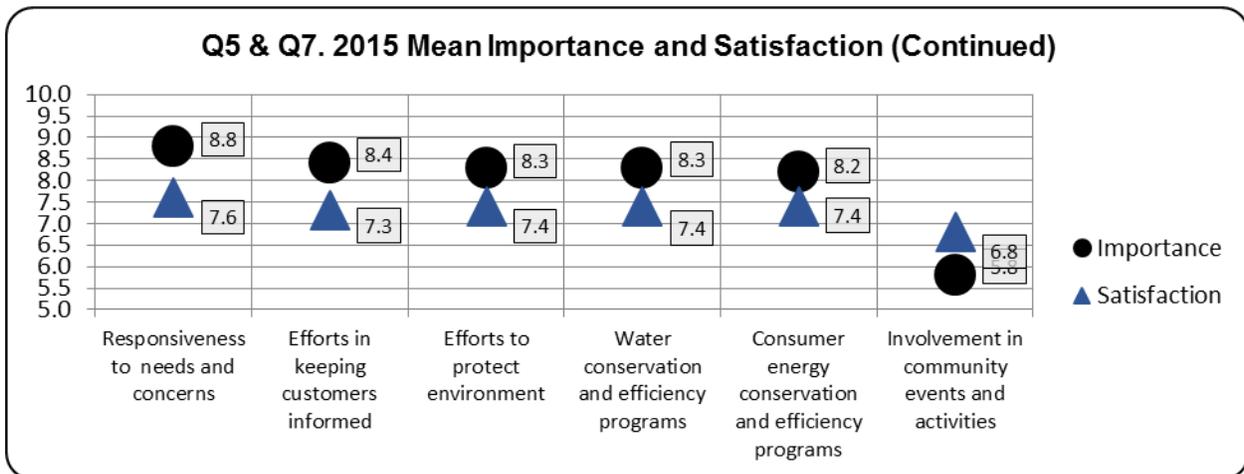
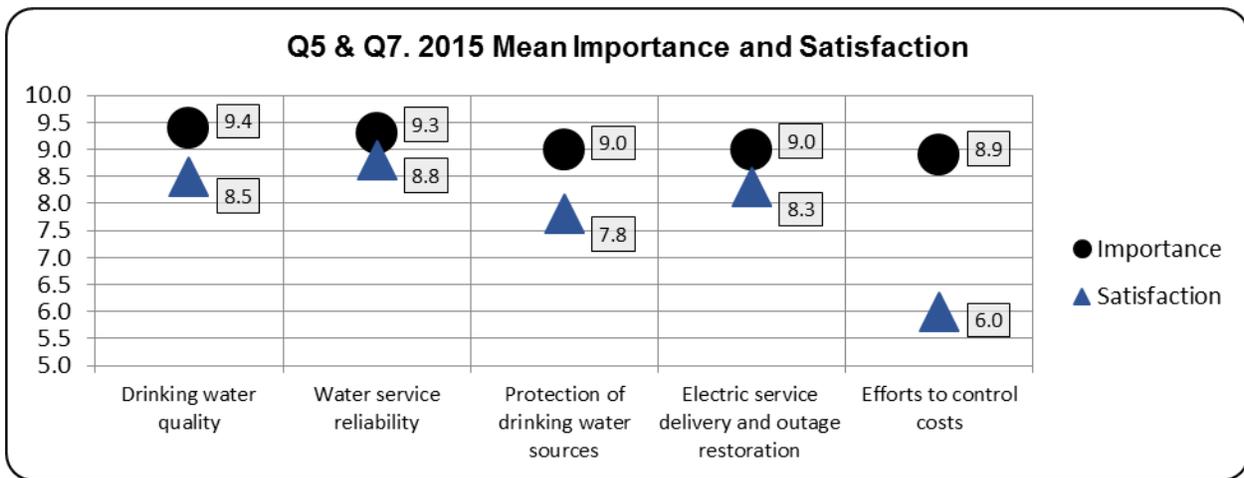




EXECUTIVE OVERVIEW: SATISFACTION & IMPORTANCE

A Gap Analysis provides insights into the relationship between importance and satisfaction. It is calculated by subtracting the importance rating from the satisfaction rating. If the gap is negative, then this indicates importance is higher than satisfaction, and presents clearer insights into the areas of opportunity to increase customer satisfaction.

- The most significant differences between satisfaction and importance exist for *efforts to control costs*, *protection of drinking water sources*, and *responsiveness to customer needs and concerns*.
- All gaps have either remained the same or shrunk over the past three years, with a notable improvement for *responsiveness to customer needs and concerns* and *efforts to control costs*.

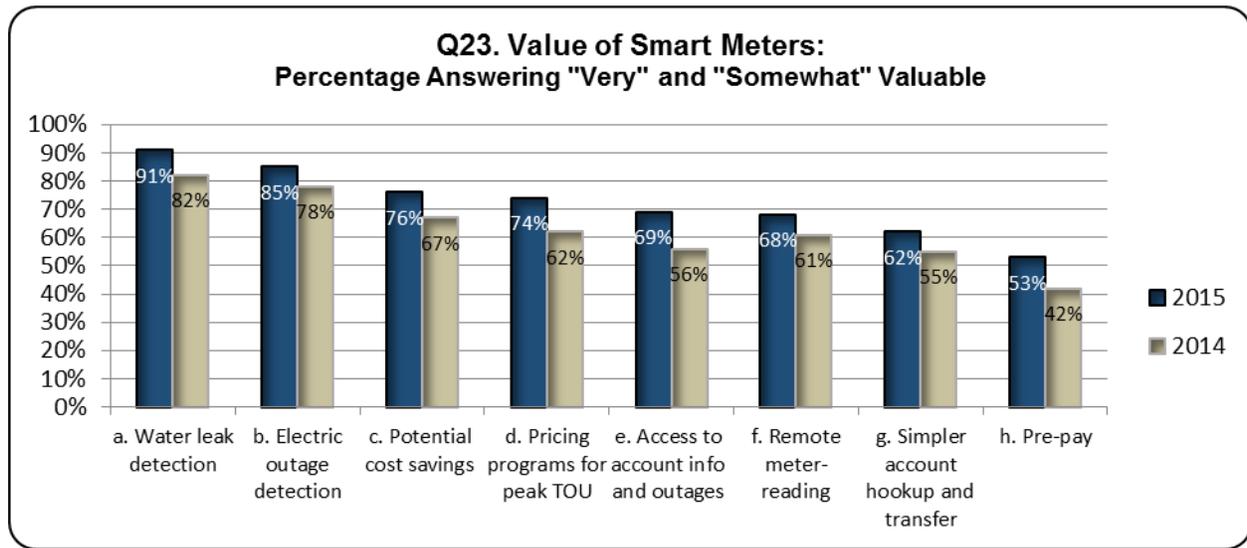




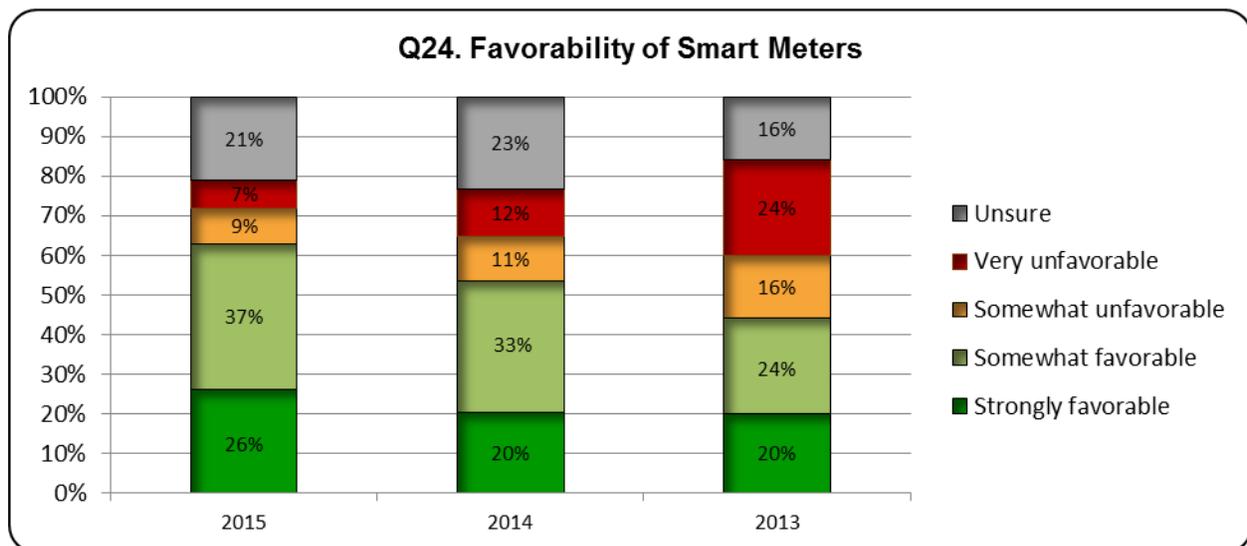
EXECUTIVE OVERVIEW: SMART METERS

- About half of respondents were familiar with Smart Meters (51%), a decrease of 6% from 2014. This included 13% who considered themselves to be *very familiar*. While 44% considered themselves to be *unfamiliar*, 5% were unsure.
- Despite a slight decrease in familiarity, a higher proportion of respondents indicated that each Smart Meter feature was either very or somewhat valuable in 2015 than in 2014.

 - The most valuable features continue to be *water leak* and *electric outage detection*.
 - Aspects that received the highest increase in value were *access to account information and outages through smartphones and apps*, *pricing programs*, and *pre-pay options*.



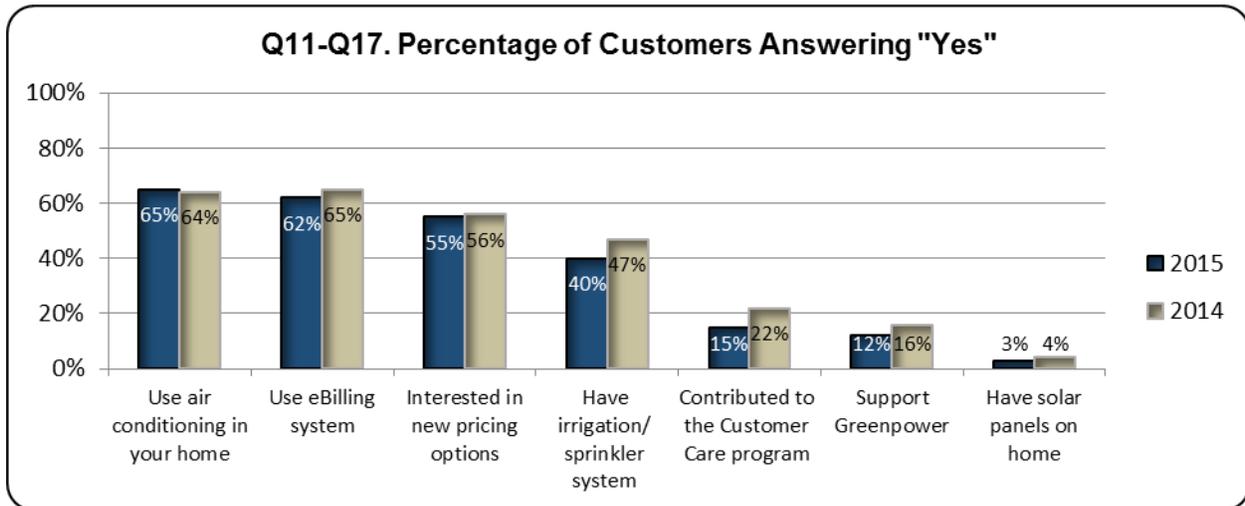
- An increasing proportion of customers have a favorable opinion of Smart Meters, with 62% indicating some level of favorability in 2015, compared to 53% in 2014.





EXECUTIVE OVERVIEW: EWEB PROGRAMS

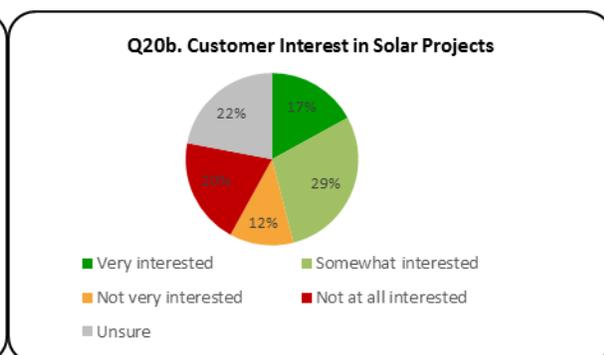
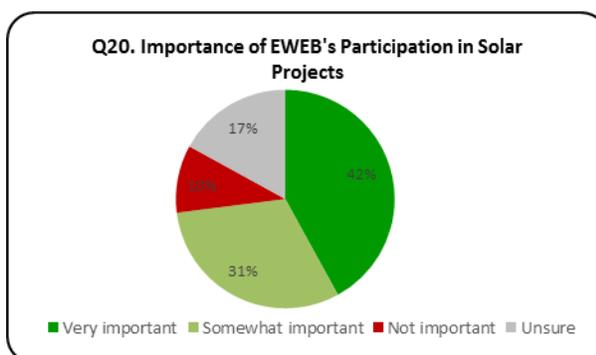
- A majority of customers have air conditioning, use EWEB's eBilling system, and are interested in new pricing options. While most results are comparable to 2014, there was a slight decrease in the proportion of respondents who have a sprinkler system, have contributed to the Customer Care program, and support Greenpower.



- While only 28% of customers were aware of EWEB's plan to diversify and add alternate water sources, 88% felt it was important to do so, including 59% who felt it was *very important*.

- Most respondents don't participate in EWEB's no- or low-interest loan programs or rebates (63%). The most useful programs according to customers who have participated include:
 - The weatherization program (23%)
 - Ductless heat pumps (20%)
 - Rebates (20%)
 - Limited Income Assistance Program (18%)

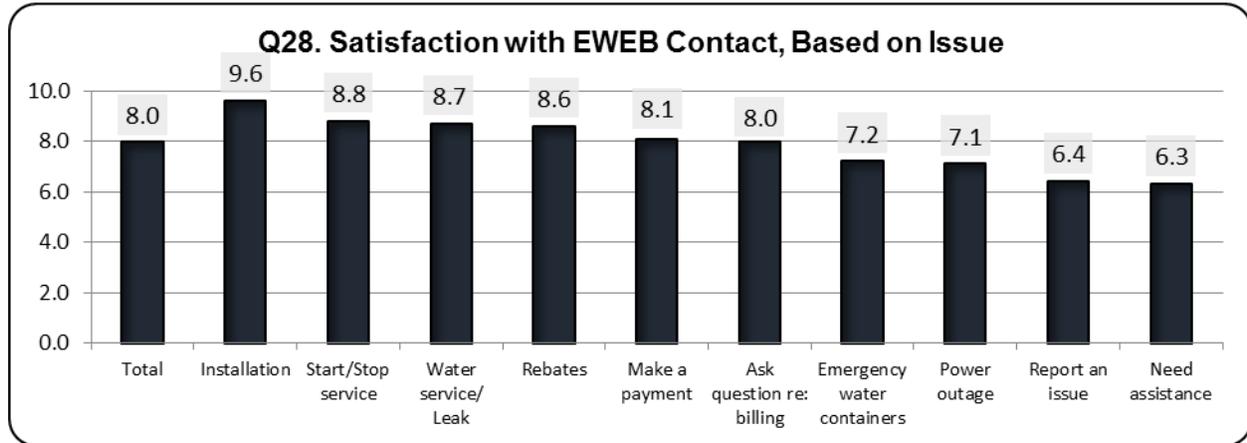
- Most customers were unfamiliar with EWEB's participation in and support of solar power projects (65%). Of the remaining respondents, 17% felt EWEB's participation and support was *too little*, 15% thought it was *about right*, and just 2% thought it was *too much*.
 - While a vast majority of customers were unfamiliar with Community Solar projects (76%), about three-quarters still felt that it was important for EWEB to participate in such a program (73%), and nearly half were interested in participating themselves (46%).





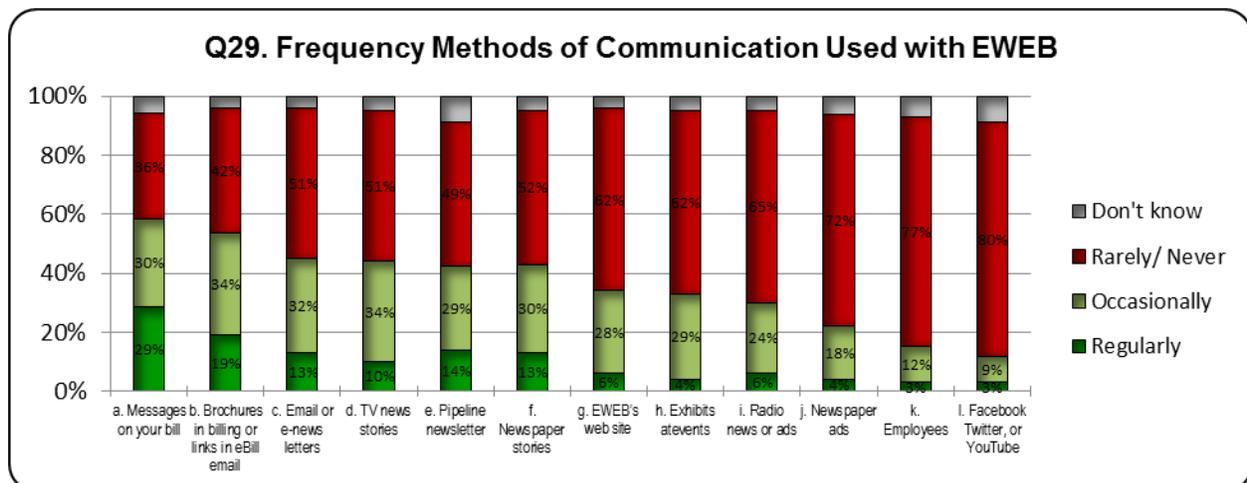
EXECUTIVE OVERVIEW: COMMUNICATIONS

- Customers who had contacted EWEB in the past six months (28%) were generally satisfied with the service they received after calling EWEB (mean of 8.0), particularly around issues of *installation*. Satisfaction was lower among those who called to *report an issue* or because they *needed assistance*.



- About half of customers said they *carefully read* the bill they receive each month, while 5% *rarely* look it, and the remainder either *occasionally* read it or only *look at the total due*.
 - 73% of those who do look at the bill each month find it *easy to understand*.

- Customers use a variety of methods to interact with and receive information about EWEB, namely *messages on their bills* and *brochures in their billing or links on their eBilling*.
 - Customers' most-preferred method of communication with EWEB is through email or e-newsletters (35%), followed by messages printed directly on their bill (19%).
 - When receiving updates about outages or service updates, half of customers would prefer a text message (50%), and many would prefer an email (43%).
 - A majority of customers felt the communications they received from EWEB were either very useful (20%) or somewhat useful (61%), further indicating their satisfaction with EWEB's *efforts to keep customers informed*.





INTRODUCTION

The Eugene Water & Electric Board (EWEB) regularly conducts a satisfaction survey among customers. The primary goals are to gauge customer satisfaction, levels of importance and interest for programs and services, awareness of various programs, and communications preferences. Riley Research Associates (RRA) worked with EWEB to execute a survey among customers in 2013 and 2014, and has updated that survey for 2015.



METHODOLOGY

Approach

EWEB provided RRA with a list of customers that had both phone numbers, and when available, email addresses. The survey was conducted both online and by telephone. RRA sent an email invitation to those with available and valid email addresses. The remainder of the customer contact list was used for the telephone portion.

Virtually the same questionnaire was used for both the phone and online survey. Only minor changes were made to the question language to make the administration of the questions easier and more applicable to the online format. Additionally, some questions that were unaided for the telephone execution (possible answer choices were not read for respondents) were aided for the online survey (possible answer choices were shown, and respondents were also invited to add their own).

The telephone survey took place from August 26th through September 11th, 2015. The online survey took place from September 3rd through 22nd, 2015. This timing was comparable to both 2013 and 2014.

Sample

A total of 1,109 customers are included in the data, including 293 interviews which were conducted by phone, and 816 that were conducted online. The combined sample of 1,109 could be considered accurate to +/-2.8 at a 95% level of confidence.

For the telephone survey, RRA used a customer list of approximately 4,790 customers, and completed 293 interviews. Customers who were contacted by phone were also offered an option of completing it online if they requested to do so; however, none took that option. The sample of 293 produces an estimated margin of error of +/-5.6% at a 95% level of confidence.

For the online survey, RRA sent approximately 5,100 customers an email in which they were invited to click on the embedded link to the survey. Customers were also sent two reminder emails. A total of 903 customers engaged with the survey, and approximately 70% completed the entire survey. Approximately 85 respondents who did not respond to more than the first three questions were removed, for a total of 816 completed or partially completed interviews. Based on the number of emails sent, this produces a response rate of 16%, an increase of 2% from 2014, and generally average for this type of online survey invitation.

Because the online sample is substantially larger, the overall results skew towards the online sample. Page 11 shows the high-level results of the separated online and telephone samples.



METHODOLOGY (CONTINUED)

Benchmarking

A customer satisfaction survey was previously conducted by RRA in 2013 and 2014. In addition to those surveys, this report also includes responses from the June 2012 Budget Survey, and the October 2011 Benchmark Survey (neither conducted by RRA). Data from previous annual customer surveys have been added for benchmark comparison, where applicable.

The 2011 and 2012 surveys utilized a “likely voter list,” rather than a customer list. This change in methodology could account for some of the differences in customer characteristics and responses in subsequent surveys. The results from 2013, 2014, and 2015 are direct comparisons of the comparable EWEB customer audience. The demographic composition of customers is largely comparable for the 2013-2015 surveys. In 2015, a larger proportion of newer customers responded to the survey than in previous years.

Wards

In addition to other demographics, customer data is also presented by ward. Four commissioners represent these eight specific wards of Eugene, and serve as the main connection between EWEB and the community. The commissioners by ward include:

Commissioners	Wards
John Brown	4 & 5
Steve Mital, president	1 & 8
Dick Helgeson	2 & 3
James Manning	6 & 7

Report Tables

The following tables include data on the percentage of respondents that selected each response. The percentages are indicated by ‘%’ for the first line in the table only. Not all responses add to 100%, due to rounding and/or accepting multiple responses. Significant demographic insights have been included, where applicable. Verbatim responses and cross-tabulations are bound separately.



Cross tabulations (Separate appendix)

The first column represents the total sample, which is the best representation of customers as a whole. The other columns represent responses from groups of people (variables such as gender, age, ward, or other characteristics). The numbers under each heading represent the values of that variable (i.e. male and female), which provides contrast among subgroups.

We have included a Chi Square statistic in the cross tabulation report. The Chi Square statistic is a basic tool that compares two or more subgroups of variables (i.e. male / female) and evaluates the probability that apparent differences between subgroups could be due to sampling error. In the cross tabulation report, each mutually exclusive variable has a Chi Square statistic which includes a p-value (or probability value).

Example of a Chi Square figure:	37.46
P-Value:	.045

The smaller the p-value, the smaller the chance any apparent difference between subgroups resulted from sampling error. Traditionally, a p-value of ≤ 0.05 is a strong indicator of statistical significance. For example, a p-value of 0.05 means there would be just a 5% chance that apparent differences between the values (i.e. males versus females) could be due to sampling error. The Chi Square statistic has limited applications, as larger samples tend to produce lower p-values.

That said, not every statistically significant finding is important or useful. For example, if we ran a table for the “length of service” and cross tabulated those numbers with the “age” of the customer, we would naturally expect the findings to be highly correlated. So despite a small p-value, the analysis would not add much insight.



ONLINE VS. TELEPHONE RESPONDENTS

There were many differences between the responses of the online sample and the phone sample, shown below. In general, those who responded by phone tended to have higher satisfaction, and consider each aspect as more important, than those who responded online. There was also a higher propensity towards electronic communications among the online respondents. Online respondents tended to have been with EWEB for a slightly shorter period of time, were more likely to be homeowners, more likely to have a college degree, and more likely to be under age 65.

Q4. Public vs. Private Utility	2015 Online	2015 Phone	2014 Online	2014 Phone
Public is more valuable	69%	52%	66%	50%
Public is less valuable	6	4	7	6
No different	13	31	13	29
Unsure	13	13	13	15

Q5. Programs and Services: Importance	2015 Online	2014 Phone	2014 Online	2014 Phone	2013 Online	2013 Phone	2012 Phone	2011 Phone
Consumer energy conservation and efficiency programs	8.1	8.4	8.5	8.0	8.4	8.0	7.7	8.4
Involvement in community events, activities	5.6	6.4	5.4	6.3	5.3	6.5	5.5	6.8
Protection of drinking water sources	8.8	9.7	9.4	9.7	9.3	9.3	-	9.4
Water conservation and efficiency programs	8.2	8.6	8.5	8.2	8.2	8.2	-	8.2
Efforts to protect environment	8.2	8.8	8.4	8.4	-	-	-	-

Q5. Programs and Services: Satisfaction	2015 Online	2015 Phone	2014 Online	2014 Phone	2013 Online	2013 Phone	2012 Phone	2011 Phone
Consumer energy conservation and efficiency programs	7.2	7.9	7.3	7.5	6.9	7.5	7.6	8.2
Involvement in community events, activities	6.7	7.3	6.8	6.8	6.5	6.7	6.7	8.0
Protection of drinking water sources	7.4	8.7	7.9	8.6	7.8	8.7	-	-
Water conservation and efficiency programs	7.1	8.0	7.3	7.6	7.1	7.8	-	8.0
Efforts to protect environment	7.3	7.9	7.4	7.7	-	-	-	-

Q6b. Aware of Plan to Diversify Water Sources	2015 Online	2015 Phone	2014 Online	2014 Phone
Very aware	8%	7%	11%	10%
Somewhat aware	22	16	31	24
Not aware	67	76	55	64
Unsure	3	0	3	2

Q6c. Importance of Diversifying Water Sources	2015 Online	2015 Phone	2014 Online	2014 Phone
Very important	55%	71%	48%	56%
Somewhat important	31	25	35	35
Not important	1	3	3	5
Unsure	13	2	14	11



ONLINE VS. TELEPHONE RESPONDENTS (CONTINUED)

Q7. Customer Service Aspects: Importance	2015 Online	2014 ⁵ Phone	2014 Online	2014 Phone	2013 Online	2013 Phone	2012 Phone
Drinking water quality	9.3	9.6	9.5	9.6	9.6	9.3	9.5
Water service reliability	9.2	9.6	9.5	9.5	9.5	9.3	-
Electric service delivery and outage restoration	9.0	9.2	9.2	9.4	9.4	9.4	9.6
Efforts in keeping customers informed	8.2	8.7	8.4	8.5	8.3	8.4	-
Responsiveness to customers' needs and concerns	8.7	9.1	8.9	8.9	8.7	8.8	-
Efforts to control cost	8.8	9.1	9.1	8.8	-	-	-

Q7. Customer Service Aspects: Importance	2015 Online	2015 Phone	2014 Online	2014 Phone	2013 Online	2013 Phone	2012 Phone
Drinking water quality	8.4	8.7	8.7	8.8	8.7	8.7	9.2
Water service reliability	8.6	9.3	7.6	8.1	8.9	8.9	-
Electric service delivery and outage restoration ¹	8.0	9.0	8.1	8.9	8.8	9.2	9.1
Efforts in keeping customers informed	7.1	7.9	7.1	7.2	7.2	7.7	-
Responsiveness to customers' needs and concerns	7.3	8.5	7.2	7.9	6.8	8.0	-
Efforts to control cost	6.3	7.0	5.6	6.0	-	-	-
How satisfied are you with EWEB overall?	7.6	8.5	8.9	9.2	-	-	-

Q11-Q17. Percentage answering "Yes"	2015 Online	2015 Phone	2014 Online	2014 Phone
Q11. Use the eBilling paperless online billing system?	80%	17%	76%	18%
Q12. Are you interested in EWEB offering some new pricing options or plans in addition to its current tiered pricing structure?	55	54	56	54
Q13. Have you ever contributed to the Customer Care program to help others who are struggling to pay their utility bills?	13	18	22	25
Q14. Support Greenpower with a voluntary contribution on monthly bill?	13	10	16	15
Q15. Have an irrigation/sprinkler system for your landscaping?	42	38	49	39
Q16. Use air conditioning in your home?	68	58	66	59
Q17. Have solar panels on your home?	4	1	4	3

Q22. Familiarity with "Smart Meters"²	2015 Online	2015 Phone	2014 Online	2014 Phone	2013 Online	2013 Phone	2011 Phone
Familiar	54%	44%	58%	50%	62%	52%	36%
Unfamiliar	41	52	42	37	34	44	63
Unsure / No response	5	4	8	5	-	4	1

Q23. Value of Smart Meter Features (Percentage answering "Very Valuable")	2015 Online	2015 Phone	2014 Online	2014 Phone
b. Electric outage detection, which automatically reports an outage	56%	55%	51%	54%
h. Pre-pay to help you track and manage your monthly bills	16	20	13	17
g. Simpler account hookup and account transfer	23	29	19	22
d. Pricing programs for peak times of use	36	30	32	26
e. Access to account info and outages through Smartphones, Apps, texts, emails	33	31	24	22
a. Water leak detection	69	65	56	52
f. Remote meter-reading so employees no longer have to come to your home	33	27	30	23
c. Potential cost savings by being able to remotely manage your energy usage and avoid times or peak demand	45	37	39	33

¹ In 2013 question worded as "Electric service reliability."

² In 2013 "smart meters" were referred to "AMI" or "Advanced Metering Infrastructure."



ONLINE VS. TELEPHONE RESPONDENTS (CONTINUED)

Q24a. Opinion on “Smart Meters”	2015 Online	2015 Phone	2014 Online	2014 Phone	2013 Online	2013 Phone	2011 Phone
Favorable	64%	60%	55%	45%	43%	45%	55%
Unfavorable	16	18	23	25	41	39	17
Unsure / No response	21	22	22	29	15	16	28

Q29. Satisfaction with recent contact	2015 Online	2015 Phone	2014 Online	2014 Phone	2013 Online	2013 Phone	2011 Phone
Mean	7.7	8.8	7.6	7.7	7.5	8.1	8.8

Q32. Typically, how do you get information about EWEB? ³	2015 Online	2015 Phone	2014 Online	2014 Phone	2013 Online	2013 Phone	2012 ⁴ Phone	2011 Phone
c. Email or e-newsletters	57%	18%	53%	19%	59%	22%	25%	24%
a. Messages printed directly on your bill	54	69	57	56	57	61	64	66
b. Brochures in your billing or links in your eBill email	49	63	50	59	41	76	65	70
f. Newspaper stories	45	40	51	45	55	60	55	52
d. TV news stories	42	49	48	49	51	63	42	41
g. EWEB’s web site	42	19	38	14	46	17	34	34
e. Pipeline newsletter	40	47	46	37	26	38	49	53
h. Exhibits at community events	35	29	34	28	24	33	25	28
i. Radio news or ads	28	31	34	27	26	46	28	18
j. Newspaper ads	21	25	25	30	23	48	38	-
k. EWEB Employees	16	12	17	19	24	33	22	19
l. Social media (Facebook, Twitter, or YouTube)	13	7	9	8	4	10	5	1

³ Percentages indicate “Regularly or occasionally” utilizes that form of communication.

⁴ Percentage answering they regularly or occasionally use that method of communication



RESULTS: EWEB PROGRAMS AND SERVICES

Q1. Does EWEB provide you with:

The vast majority of respondents have both electric and water service through the Eugene Water & Electric Board (EWEB) (80%), while 20% have electric service only.

The proportion with both services decreased from the previous surveys.

	2015 Total	2014 Total	2013 Total	2012 Total
Total Participants	1109	1602	1260	412
Electricity and water	80%	86%	90%	86%
Electric service only	20	14	10	12
Water service only	-	0	0	1

Q2. Are you or is anyone in your household an employee of EWEB? (Clarify which as necessary)⁵

Virtually no respondents were EWEB employees (98%).

	2015 Total	2014 Total
Total Participants	1109	1318
No	98%	98%
Yes - Self	1	1
Yes - Household member	0	0
Yes - Both self and household member	-	0

⁵ As in past years, employees were included in the survey as customers; the extremely small sample does not affect the overall results.

Q3. What comes to mind in terms of the type or quality of service EWEB provides? (Open-ended verbatim question, coded)

About two-thirds of respondents mentioned a positive attribute of EWEB, namely that it is *dependable/reliable/consistent*, and about one-fifth had a neutral response, remarking that they *have no complaints* with EWEB. About one-fifth had a negative response, namely that EWEB is *expensive*.

The proportion of respondents who offered a positive comment about EWEB increased from 2014.

Those in ward E8 were the least likely to provide a positive remark, along with ages 35-49.

Refer to verbatim appendix for full list of comments.

	2015 Total	2014 Total
Total Participants	988	1461
Positive	64%	56%
Dependable / Reliable / Consistent	26	16
Good / Great	17	13
Positive (general)	12	16
Good / Great service	9	4
Excellent	6	5
Quality / High quality service	3	4
Efficient	1	1
Negative	22%	24%
Expensive	17	16
Negative (general)	7	7
Monopoly	1	1
Neutral	21%	18%
Satisfactory / No complaints / Issues / Problems	12	9
Fine / OK	7	6
Adequate / Average / Basic	3	3
Descriptive	4%	3%
Water and electric utility	3	2
Clean water	1	1
Miscellaneous	6%	11%
Miscellaneous	5	10
Necessary	1	1

Q4. As you may know, EWEB is a publicly owned electric and water utility. As a public utility, EWEB does not operate to earn a profit or to serve the investment needs of stockholders. Instead, EWEB is chartered by the city of Eugene to serve the interests of citizens.

Knowing this, would you consider having a public utility to be more valuable or less valuable than a private, investor-owned utility, or does it make no difference? Much or somewhat?

About two-thirds of customers felt that a public utility is more valuable than having a private utility (64%), including nearly half who felt it was *much more valuable*. With 18% saying it was *no different*, just 5% felt it was *less valuable*.

The proportion who felt a public utility was *more valuable* remained comparable to 2014, increasing by 1%.

Customers with a college degree and those with an annual household income of \$75,000 or more were more likely than others to feel the public owned utility is more valuable (72% and 71%, respectively), along with those who live in wards E1, E2, and E3 (72% to 78%).

	2015 Total	2014 Total
Total Participants	1109	1598
More Valuable	64%	63%
Much more valuable	45	42
Somewhat more valuable	20	21
No different	18%	16%
Less Valuable	5%	7%
Somewhat less valuable	2	3
Much less valuable	3	4
Unsure	13%	14%

Q4b. Why is that?

Customers who felt a public utility was more valuable than a private utility mentioned lower prices and that they felt a public utility had more concern about the customers than with profits, and felt it provided better service. However, many said they didn't notice a difference at all. Refer to verbatim appendix for full list of comments.

Q5. For this next set of questions, I'm going to read a program or service that EWEB provides, and ask you first how important that program is, then how satisfied you are with the program. We'll start with a scale of "0" to "10", where "0" is not at all important and "10" is very important. (Aided, Rotated)

Importance

Protection of drinking water sources was the most important aspect to customers, who rated it a 9.0 on a scale where "10" is "very important." *Efforts to protect the environment*, and *consumer water and energy programs* were also considered important (8.2-8.3 ratings). EWEB's *involvement in community events and activities* was considered only of average importance.

While still considered the most important issue, the mean rating for *protection of drinking water sources* decreased by 0.4, from 2014 to 2015. All other ratings also decreased by 0.1 to 0.2 points, with the exception of *involvement in community events and activities*, which increased slightly.

In general, females, those with no college degree, older respondents, and those with an annual income of less than \$30,000 tend to rate the importance of EWEB's programs and services higher than others. Those who live in wards E1 and E2 also tended to have higher ratings than others, along with those who only receive electric service from EWEB.

Programs and Services: Importance	Mean Importance				
	2015	2014	2013	2012	2011
a. Protection of drinking water sources	9.0	9.4	9.3	-	9.4 ⁶
b. Efforts to protect environment	8.3	8.4	8.3	-	-
c. Water conservation and efficiency programs ⁷	8.3	8.4	8.2	-	8.2
d. Consumer energy conservation and efficiency programs	8.2	8.5	8.3	7.7 ⁸	8.4 ⁹
e. Involvement in community events and activities	5.8	5.6	5.5	5.5 ¹⁰	6.8

⁶ In 2011 question worded as "Protection of water sources."

⁷ In previous surveys, question worded as "Water conservation programs."

⁸ In 2012 question worded as "Offer energy conservation programs and rebates."

⁹ In 2011 question worded as "EWEB's consumer energy conservation programs."

¹⁰ In 2012 question worded as "Participating in, and sponsoring, community events."

Q5. For this next set of questions, I'm going to read a program or service that EWEB provides, and ask you first how important that program is, then how satisfied you are with the program. We'll start with a scale of "0" to "10", where "0" is not at all important and "10" is very important. (Aided, Rotated) (Continued)

Satisfaction

Customer satisfaction with EWEB's services and programs is moderate, with ratings ranging from a low of 6.8 (*involvement in community events and activities*) to a high of 7.8 (*protection of drinking water sources*). The highest-rated aspects in terms of satisfaction are also the highest-rated in terms of importance.

About one-fifth of customer respondents were unable to provide their satisfaction ratings for the aspects, indicating that many are possibly unfamiliar with EWEB's outreach and program efforts.

Compared to 2014, satisfaction has remained comparable, decreasing by an insignificant 0.2 points for *protection of drinking water sources*, and remaining the same or within 0.1 point for the other aspects.

In general, those with no college degree, older respondents, and those with an annual income of less than \$30,000 tend to provide higher satisfaction ratings than others. Those who live in wards E2, E\$, and E6 also tended to give higher ratings than others.

Programs and Services: Satisfaction	Mean Satisfaction				
	2015	2014	2013	2012	2011
a. Protection of drinking water sources	7.8	8.0	8.0	-	-
b. Efforts to protect environment	7.4	7.4	7.4	-	-
c. Water conservation and efficiency programs	7.4	7.3	7.2	-	8.0
d. Consumer energy conservation and efficiency programs	7.4	7.3	7.0	7.6	8.2
e. Involvement in community events and activities	6.8	6.8	6.6	6.7	8.0

Q5. For this next set of questions, I'm going to read a program or service that EWEB provides, and ask you first how important that program is, then how satisfied you are with the program. We'll start with a scale of "0" to "10", where "0" is not at all important and "10" is very important. (Aided, Rotated) (Continued)

Gap Analysis

The Gap Analysis provides insights into the relationship between importance and satisfaction. It is calculated by subtracting the importance rating from the satisfaction rating. If the gap is negative, then this indicates importance is higher than satisfaction, and presents clearer insights into the areas of opportunity to increase customer satisfaction.

While most gaps are negative, they are on an upwards trend from 2013 and 2014, indicating that the gap between satisfaction and importance is shrinking.

Gap Analysis	2015	2014	2013
a. Protection of drinking water sources	-1.2	-1.4	-1.3
b. Efforts to protect environment	-0.9	-1.0	-0.9
c. Water conservation and efficiency programs ¹¹	-0.9	-1.1	-1.0
d. Consumer energy conservation and efficiency programs	-0.8	-1.2	-1.0
e. Involvement in community events and activities	1.0	1.2	1.1

All response data

Importance n=1109	Not at all important							Very important					DK
	0	1	2	3	4	5	6	7	8	9	10		
a. Protection of drinking water sources	1%	0%	1%	3%	3%	3%	1%	1%	6%	10%	69%	3%	
b. Efforts to protect environment	1	1	2	3	3	5	2	6	12	11	51	2	
c. Water conservation and efficiency programs	1	1	1	4	3	5	3	6	12	14	47	3	
d. Consumer energy conservation and efficiency programs	1	1	1	4	3	6	4	7	11	13	46	4	
e. Involvement in community events and activities	10	3	4	6	5	14	9	13	9	6	16	3	

Satisfaction n=1080	Not at all satisfied							Very satisfied					DK
	0	1	2	3	4	5	6	7	8	9	10		
a. Protection of drinking water sources	2%	1%	1%	2%	1%	9%	5%	9%	13%	14%	26%	18%	
b. Efforts to protect environment	1	1	1	2	2	10	6	11	16	11	19	19	
c. Water conservation and efficiency programs	2	1	1	2	2	10	6	11	15	11	19	20	
d. Consumer energy conservation and efficiency programs	2	1	1	3	2	10	6	10	16	11	20	18	
e. Involvement in community events and activities	4	1	2	2	4	12	5	10	12	9	16	23	

¹¹ In previous surveys, question worded as "Water conservation programs."

Q6a. What is the source of Eugene’s drinking water? (Aided, multiple responses)

About half of EWEB customers could properly name the McKenzie River as the source of Eugene’s drinking water. The remaining customers tended to be unsure (37%), while 17% named some part of the Willamette River and 8% named another source.

Customers who were more likely than others to answer “The McKenzie River” included: males, customers ages 50 and older, home owners, college graduates, and those making more than \$75,000 per year. The likelihood of knowing the correct source increased with the number of years as a customer. Those with natural gas as their primary heating source were also more likely than others to give the correct answer, along with those in ward E2.

	2015 Total
Total Participants	1073
<u>McKenzie River</u>	51%
McKenzie River	51
<u>Willamette River</u>	17%
Willamette River in general	12
Main stem of the Willamette River	5
Middle fork of the Willamette River	3
<u>Other</u>	8%
Groundwater wells	7
Another source	2
<u>Unsure</u>	37%
Don't know	37

Q6b. EWEB currently relies on only one source of drinking water, the McKenzie River. In order to ensure safe and reliable water supplies, EWEB is looking at additional sources.

Would you say you were currently very aware, somewhat aware, or not aware that EWEB is planning to diversify and add alternate water sources?

The majority of customers were not aware that EWEB is planning to diversify and add water sources (69%), while 20% were *somewhat aware* and just 8% considered themselves *very aware*.

The proportion of respondents who were aware of EWEB's plans decreased by about 13% from 2014 to 2015.

Awareness was lowest among those ages 18-34, females, renters, those with no college degree, those with an annual income of less than \$35,000, those who only receive electric service through EWEB, newer customers, and those who live in wards E3 and E7.

	2015 Total	2014 Total
Total Participants	1066	1564
Very aware	8%	11%
Somewhat aware	20	30
Not aware	69	57
Unsure/Refused	2	2

Q6c. How important is it that EWEB has a plan to diversify and add alternate water sources? Would you say very important, somewhat important, or not important?

The majority of customers felt it was *very important* for EWEB to diversify and add water sources (59%), with an additional 29% saying it was *somewhat important*. With 10% unsure, just 2% felt this EWEB having this plan was *not important*.

The proportion indicating that it was *very important* that EWEB has a plan to diversify and add water sources increased by 10% from 2014.

Females, customers ages 50 and older, those who live alone, and those who live in ward E7 were more likely than others to feel it is *very important* for EWEB to have plans to diversify and add alternate water sources.

	2015 Total	2014 Total
Total Participants	1066	1564
Very important	59%	49%
Somewhat important	29	34
Not important	2	3
Unsure	10	14

Q7. Again using those same scales of “0” to “10”, I’d like to ask how important some aspects of EWEB’s customer service are to you, and then your satisfaction with those same aspects. (Aided, Rotated)

Both *drinking water quality* and *water service quality* were very important to customers, with mean ratings of 9.4 and 9.3, respectively. The other aspects were also considered highly important, with *efforts to keep customers informed* being the lowest-rated with a mean of 8.4.

Compared to 2014, importance ratings have remained comparable, with some showing an insignificant decrease of 0.1 to 0.2 points.

Customer Service: Importance	Importance				
	2015	2014	2013	2012	2011
a. Drinking water quality	9.4	9.6	9.5	9.5 ¹²	9.5
b. Water service reliability	9.3	9.5	9.4	-	9.6
c. Electric service delivery and outage restoration	9.0	9.2	9.4	9.6	9.4
d. Efforts to control costs	8.9	9.0	8.9	-	-
e. Responsiveness to customers’ needs and concerns	8.8	8.9	8.8	-	9.1 ¹³
f. Efforts in keeping customers informed	8.4	8.4	8.4	-	8.3

Satisfaction with EWEB ranged from a high of 8.8 (*water service reliability*) to a low of 6.0 (*efforts to control costs*). Overall satisfaction was rated a solid 7.9.

Satisfaction increased slightly in some areas from 2014 (*efforts to control costs*, *responsiveness*, *keeping customers informed*, and *overall satisfaction*), and decreased slightly for others (*drinking water quality*, *water service reliability*).

Although not necessarily statistically significant, females, those ages 65 and older, those with an annual income of less than \$30,000, and those with no college degree tended to have higher satisfaction than others.

Customer Service: Satisfaction	Satisfaction				
	2015	2014	2013	2012	2011
a. Drinking water quality	8.5	8.7	8.7	9.2	9.0
b. Water service reliability	8.8	9.0	8.9	-	-
c. Electric service delivery and outage restoration	8.3	8.3	8.9	9.1	9.2
d. Efforts to control costs	6.0	5.7	5.3	-	-
e. Responsiveness to customers’ needs and concerns	7.6	7.3	7.0	-	8.6
f. Efforts in keeping customers informed	7.3	7.1	7.3	-	8.1
g. EWEB Overall	7.9	7.7	8.0	-	-

¹² In 2012 question worded as “Provide reliable and clean water,” whereas in 2013 it was separated as “Drinking water quality” and “Water service reliability.”

¹³ In 2011& 2009 question worded as “EWEB’s responsiveness to customers.”

Q7. Again using those same scales of “0” to “10”, I’d like to ask how important some aspects of EWEB’s customer service are to you, and then your satisfaction with those same aspects. (Aided, Rotated) (Continued)

Gap Analysis

The Gap Analysis provides insights into the relationship between importance and satisfaction. It is calculated by subtracting the importance rating from the satisfaction rating. If the gap is negative, then this indicates importance is higher than satisfaction, and presents clearer insights into the areas of opportunity to increase customer satisfaction.

While the gaps are negative, they have either remained comparable to previous years, or have improved. The most notable improvements are for *efforts to control costs*, and *responsiveness to needs and concerns*.

Gap Analysis	2015	2014	2013
a. Drinking water quality	-0.9	-0.9	-0.8
b. Water service reliability	-0.5	-0.5	-0.5
c. Electric service delivery and outage restoration	-0.7	-0.9	-0.5
d. Efforts to control costs	-2.9	-3.3	-3.6
e. Responsiveness to needs and concerns	-1.2	-1.6	-1.8
f. Efforts in keeping customers informed	-1.1	-1.3	-1.1

All ratings data

Importance n=1044	Not at all important						Very important						DK
	0	1	2	3	4	5	6	7	8	9	10		
a. Drinking water quality	0%	0%	0%	0%	2%	1%	0%	2%	6%	11%	74%	3%	
b. Water service reliability	-	0	0	0	2	2	0	2	7	16	67	3	
c. Electric service delivery and outage restoration	0	0	0	0	2	2	2	5	9	17	58	3	
d. Efforts to control costs	0	0	0	1	3	3	2	6	10	13	58	3	
e. Responsiveness to needs and concerns	0	0	0	1	2	4	2	7	15	15	51	3	
f. Efforts in keeping customers informed	0	1	0	1	2	5	5	11	16	13	43	1	

Satisfaction n=1026	Not at all satisfied						Very satisfied						DK
	0	1	2	3	4	5	6	7	8	9	10		
a. Drinking water quality	1%	0%	1%	2%	2%	4%	3%	7%	12%	18%	45%	5%	
b. Water service reliability	1	0	0	1	1	4	2	5	10	17	51	7	
c. Electric service delivery and outage restoration	1	1	1	1	2	6	4	8	13	19	36	9	
d. Efforts to control costs	6	3	3	4	4	11	7	11	13	12	17	8	
e. Responsiveness to needs and concerns	2	1	1	1	3	8	5	11	15	16	26	11	
f. Efforts in keeping customers informed	2	1	2	2	3	11	8	13	17	12	23	6	

Q8a. Thinking about the service you receive from EWEB, what do you think they do best in terms of either the type or quality of service they provide? (Open-ended verbatim)

Customers mentioned good water quality, reliable service, and community concern and involvement.

Refer to verbatim appendix for full list of responses.

Q8b. And in what ways could EWEB improve? (Open-ended verbatim)

While some customers had specific suggestions, many mentioned keeping costs down, and making sure that the water quality remains good, and that they continue to deliver quality, reliable services.

Refer to verbatim appendix for full list of responses.



RESULTS: REBATES / PROGRAMS

Q9a. EWEB offers rebates and no- or low-interest loan programs for many home improvements that can help customers reduce energy and water use and save money on their utility bills.

Which of these programs that EWEB offers, if any, have you utilized in the past two years? (Unaided, but clarify response as necessary. Multiple responses.)

A vast majority of respondents have not utilized any rebates or loan programs (74%), with about 20% mentioning at least one program they've utilized. The top-mentioned programs included *rebates, weatherization, and ductless heat pumps.*

Customers who were more likely than others to indicate they had utilized one of EWEB's programs included those with an annual income of less than \$30,000 (49%), those who have been a customer for 16 or more years (44%), those who only receive electric service from EWEB (41%), those who live alone (41%), females (38%), those ages 50 and older (37% to 38%), renters (38%), and those with no college education (38%).

	2015 Total
Total Participants	976
Rebates (other general appliance)	6%
Weatherization program	5
Ductless heat pumps	5
Limited income assistance program	4
Heating and cooling system programs	2
Ducted heat pumps	2
Heat pump water heaters	2
High efficiency toilets	1
Solar	1
Rental property resources	1
New home construction programs	0
Sprinkler timer rebates	0
Miscellaneous	3
None / Have not used any	63
Have not used / Renter	11
Refused / Unsure	4

Q10. Regarding the rebates and no- or low- interest loan programs that have been available to EWEB customers, which, if any, have you found particularly useful or beneficial for electric or water? (Unaided, but clarify response as necessary. Multiple responses)¹⁴

Of those customers who indicated they have used one of EWEB's rebate or loan programs, about one-fifth mentioned the *weatherization program, general rebates, ductless heat pumps, and the limited income assistance program* as being particularly useful.

	2015 Total	2014 Total	2013 Total
Total Participants	224	1389	926
Weatherization program	23%	30%	38%
Rebates (other general appliance)	20	2	-
Ductless heat pumps	20	11	-
Limited income assistance program	18	10	15
Heating and cooling system programs	11	12	35
Solar	11	1	2
Ducted heat pumps	8	6	-
Heat pump water heaters	8	5	-
High-efficiency toilet rebate	7	8	6
Sprinkler timer rebate	5	4	2
Rental property resources	2	3	-
New home construction programs	2	3	3
Miscellaneous	7	5	3
Haven't used any / Didn't qualify	N/A	3	3
Unfamiliar - Don't know of any	N/A	33	31
None	5	8	17
Refused / Unsure	13	11	1

Q10c. (If have not participated) Why haven't you participated in these programs? What could EWEB do or provide to make you more likely to participate in any of these programs? (Open-ended verbatim)

Many customers said they weren't aware of the programs, and some said they simply weren't interested. Others said they had no need for such programs. Refer to verbatim appendix for full list of responses.

¹⁴ In 2015, an initial question (Q9) was added, asking which programs they'd utilized. The 2015 for Q10 data includes only respondents who indicated they had utilized a program in the past two years, so a direct comparison to the 2014 and 2013 data can't be made here.

Q11-17. For the following questions, I just need a yes or no:

The majority of customers use air conditioning (65%), use the eBilling system (62%), and are interested in pricing options (55%). Many also have an irrigation or sprinkler system (40%). Fewer have contributed to the Customer Care program (15%), support Greenpower (12%), or have solar panels (3%).

The proportion of people answering “yes” is comparable to 2014 for most aspects, with the exception of a decrease among customers who have *contributed to the Customer Care program*, and those who have an *irrigation or sprinkler system*.

Those more likely than others to be using the following services include:

- Use eBilling: Ages 18-49, households of two or more people, college graduates, those with higher incomes, newer customers.
- Interested in new pricing options or plans: Ages 18-34, those with annual incomes of \$30,000-75,000.
- Contributed to the Customer Care program: longer-term customers
- Support Greenpower: Ages 35-49, home owners, college graduates, those with higher incomes, and those who get both electric and water service through EWEB, longer-term customers.
- Have an irrigation/sprinkler system: Males, ages 65 and older, home owners, college graduates, those with higher incomes, and those who get both electric and water service through EWEB, longer-term customers.
- Use air conditioning: Ages 65 and older, households of two or more people, home owners, those with higher incomes, those who get both electric and water service through EWEB, customers of 6-15 years, and those whose primary heating source is natural gas.

Percentage answering “Yes”	2015	2014
Q11. Do you use the eBilling paperless online billing system?	62%	65%
Q12. Are you interested in EWEB offering some new pricing options or plans in addition to its current tiered pricing structure?	55	56
Q13. Have you ever contributed to the Customer Care program to help others who are struggling to pay their utility bills?	15	22
Q14. Do you support Greenpower with a voluntary contribution on your monthly bill?	12	16
Q15. Do you have an irrigation/sprinkler system for your landscaping?	40	47
Q16. Do you use air conditioning in your home?	65	64
Q17. Do you have solar panels on your home?	3	4

All responses: 2015	Yes	No	Unsure
Q11. Do you use the eBilling paperless online billing system?	62%	37%	1%
Q12. Are you interested in EWEB offering some new pricing options or plans in addition to its current tiered pricing structure?	55	21	24
Q13. Have you ever contributed to the Customer Care program to help others who are struggling to pay their utility bills?	15	79	6
Q14. Do you support Greenpower with a voluntary contribution on monthly bill?	12	82	6
Q15. Do you have an irrigation/sprinkler system for your landscaping?	40	57	2
Q16. Do you use air conditioning in your home?	65	35	-
Q17. Do you have solar panels on your home?	3	96	1

Q16b. (If have air conditioning) Is that central air conditioning or a window unit?

Among those customers who indicated that they have air conditioning, about two-thirds have central air (67%), and 29% have window unit(s).

The proportion of respondents who have central air decreased from 2014.

	2015 Total	2014 Total
Total Participants	639	908
Central air conditioning	67%	74%
Window unit(s)	29	24
Both	2	-
Don't know / Refused	2	2

Q18. How would you rate EWEB's participation in and support of solar power projects? Would you say:

Customers are generally unfamiliar with EWEB's participation in and support of solar power projects, with 65% indicating they weren't sure how to rate it. Those who did offer a response tended to feel EWEB's participation was *too little* (17%) or *about right* (15%), with virtually none thinking EWEB was participating *too much* (1%).

Those more likely to be unsure included customers ages 18-34, those who have been a customer for fewer than five years, and those in ward E3.

	2015 Total
Total Participants	983
Too much	1%
About right	15
Too little	17
Shouldn't participate or promote at all	2
Not familiar / Unsure	65

Q19. Would you say you are very familiar, somewhat familiar, or not familiar with Community Solar programs?

About one-quarter of customers were either very familiar or somewhat familiar with Community Solar projects (3% and 21%, respectively). With 63% saying they were *not familiar* with the programs, 13% were unsure.

The customers with lowest familiarity included those ages 18-34, renters, those with no college education, those with an annual income of less than \$30,000, those who receive only electric service through EWEB, customers of five or fewer years, and residents of ward E3.

	2015 Total
Total Participants	984
Very familiar	3%
Somewhat familiar	21
Not familiar / Never heard of	63
Don't know / Refused	13

Q20. Community Solar programs provide output credit and possible tax benefits to utility customers whose homes aren't well positioned to harness solar power, those who rent or may lack the financial capability of installing solar electric systems on their own homes. Customers can either purchase solar panels in a common location, or they can buy specific output from existing solar panels.

How important is it to you that EWEB participates in community solar projects? (Aided)

EWEB's participation in Community Solar programs was important to customers (73%), including 42% who felt it was *very important*. With 17% unsure, 10% felt EWEB's participation in such programs was *not important*.

Customers in wards E1 and E2 were more likely than others to feel EWEB's participation is important.

	2015 Total
Total Participants	981
Important	73%
Very important	42%
Somewhat important	31
Not important	10%
Not very important	5
Not important at all	4
Unsure	17%
Too unfamiliar to say	12
Don't know / Refused	6

Q20b. How interested would you be in participating in this type of community solar project? (Aided)

Nearly half of respondents would be interested in this type of Community Solar program (46%), including 17% who would be *very interested*. With about one-third *not interested*, 12% were unsure.

Interest was highest among those ages 35-49, those with a college degree, and residents of wards E1 and E2.

	2015 Total
Total Participants	982
<u>Interested</u>	46%
Very interested	17%
Somewhat interested	29
<u>Not interested</u>	32%
Not very interested	12
Not interested at all	20
<u>Unsure</u>	22%
Too unfamiliar to say	12
Don't know / Refused	10

Q21. Do you own or lease an electric vehicle or hybrid? (If no) Do you plan to purchase or lease one in the next few years?

Three-quarters of customers do not have an electric or hybrid vehicle, nor do they have plans to get one in the next few years (75%). Of the remaining respondents, 9% currently have one, and 9% have plans to get one.

Customers most likely to currently have or plan on leasing an electric or hybrid vehicle included those ages 35-64, those with a college degree, those with an annual income of more than \$75,000, those with natural gas heat, and residents of wards E1 and E3.

	2015 Total
Total Participants	982
Currently own/lease electric vehicle	1%
Currently own/lease hybrid vehicle	8
Plan to purchase lease electric vehicle	3
Plan to purchase/lease hybrid vehicle	6
No plans in the future	75
Don't know / Refused	7



RESULTS: SMART METERS

Q22. Now I'd like to ask some questions about so-called "Smart Meters." Many utilities have modernized with digital smart meters that are connected to the utility's information systems. These are intended to provide a more efficient system that helps improve service reliability and provides easier management of energy and water usage.

Would you say you are very familiar, somewhat familiar, somewhat unfamiliar, or very unfamiliar with smart meters?

About half of customers are familiar with smart meters (51%), including 13% who felt they were *very familiar*. 44% were *unfamiliar*, and 5% were *unsure*.

The proportion of respondents who were familiar with Smart Meters decreased by 6% from 2014 to 2015, while the proportion that were unfamiliar increased.

Those most likely to be familiar with Smart Meters included: males, ages 50-64, home owners, college graduates, those with an annual income of \$75,000 or more, those who only receive electric service through EWEB, those with natural gas heating, and residents of ward E2. Additionally, familiarity increases with the number of years customers have been with EWEB.

	2015 Total	2014 Total	2013 Total	2011 Total
Total Participants	976	1402	1059	406
Familiar	51%	57%	59%	36%
Very familiar	13	15	16	10
Somewhat familiar	38	42	44	26
Unfamiliar	44%	38%	36%	63%
Somewhat unfamiliar	12	17	12	13
Very unfamiliar	32	21	24	49
Unsure / No response	5%	5%	4%	1%
Don't know / Refused	5	5	4	1

Q23. I'd like to read a list of features available with smart meters. Please tell me if you find each feature very valuable, somewhat valuable, or not valuable. (Rotated order)

The majority of customers felt each feature was valuable, with nearly all customers saying that *water leak detection* was valuable, and the vast majority also indicating value in *electric outage detection, potential cost savings, and pricing programs*.

The proportion of customers who indicated value in the Smart Meter features increased significantly for each feature.

In general, younger respondents and renters tended to be more likely than others to consider the Smart Meter features to be *very valuable*.

Smart Meter Features Percentage answering "Very" and "Somewhat" Valuable	2015	2014
a. Water leak detection	91%	82%
b. Electric outage detection, which automatically reports an outage	85	78
c. Potential cost savings by being able to remotely manage your energy usage and avoid times or peak demand	76	67
d. Pricing programs for peak times of use	74	62
e. Access to your account information and outages through Smartphones, Apps, text messages, or emails	69	56
f. Remote meter-reading so employees no longer have to come to your home	68	61
g. Simpler account hookup and account transfer	62	55
h. Pre-pay to help you track and manage your monthly bills	53	42

All Responses: 2015	Very Valuable	Some what	Not Valuable	Depends	Refused
a. Water leak detection	68%	23%	5%	1%	3%
b. Electric outage detection	55	30	10	1	4
c. Potential cost savings	43	33	17	1	6
d. Pricing programs for peak times of use	34	40	15	2	9
e. Access to your account information and outages	32	37	25	1	4
f. Remote meter-reading	31	37	21	2	9
g. Simpler account hookup and account transfer	25	37	24	2	12 ¹⁵
h. Pre-pay to help you track and manage your monthly bills	17	36	38	1	9

¹⁵ While we did not record data for why a respondent refused this question, this higher non-response rate could be due to customers feeling it was not an applicable feature for them.

Q24. Based on those features, and anything else you might know about smart meters, do you have a favorable or unfavorable opinion of EWEB’s plan to modernize its systems and offer new services to customers who opt in? Strongly or somewhat?¹⁶

Nearly two-thirds of customers had a *favorable* opinion on EWEB’s modernization plans (62%), including one-quarter who said their opinion was *very favorable*. About one-fifth were *unsure*, and 17% had an *unfavorable* opinion.

The proportion of customers with a favorable view of EWEB’s modernization plans increased significantly from 2014, by 9%, while the proportion of those with an unfavorable view decreased.

Customers most likely to have a favorable opinion included: those ages 18-34, those with an annual income of \$75,000 or more, those with natural gas heating, and residents of ward E4.

	2015 Total	2014 Total	2013 Total	2011 Total
Total Participants	950	1380	760	406
Favorable	62%	53%	44%	55%
Strongly favorable	26	20	20	22
Somewhat favorable	37	33	24	34
Unfavorable	17%	23%	41%	17%
Somewhat unfavorable	9	11	16	10
Very unfavorable	7	12	24	7
Unsure / No response	21%	23%	16%	28%
Unsure / Refused	21	23	16	28

Q24. And why is that? (Open-ended verbatim)

Some customers appreciated the efforts to modernize the system, and liked the potential cost savings it could provide. They felt Smart Meters could make the system more effective and efficient, and some said they trusted EWEB to make good decisions. Opponents were concerned with the security, privacy, and safety of Smart Meters. Refer to the verbatim appendix for full list of responses.

¹⁶ In 2014 the questions was as follows, “(If familiar) Do you have a favorable or unfavorable opinion of EWEB’s plan to install Advanced Metering Infrastructure, including “smart” digital meters?”



RESULTS: COMMUNICATIONS

Q25. What would you say is the most important issue facing you or your community? (Unaided for telephone survey; Aided for online survey, Single Response) Second?

Looking at the top-two issues combined, the top issues for customers were *homelessness*, *jobs/unemployment*, and *education*, followed by *crime* and *climate change*.

	Most important issue			2 nd most important issue		
	2015	2014	2013	2015	2014	2013
Total Participants	950	1372	1092	757	1139	1032
Jobs / unemployment	13%	23%	26%	8%	16%	18%
Education	11	16	12	10	11	11
Homelessness	11	9	6	16	13	14
Crime	10	10	11	9	12	11
Climate change	10	8	6	6	7	4
Economy / Cost of living	7	1	1	9	1	-
Clean water supply	6	6	5	4	5	4
Affordable electric and water rates	5	8	15	6	9	12
Environment	5	5	5	7	7	6
Conservation: Energy/water	3	2	2	4	5	4
Taxes	2	1	-	3	0	-
Transportation infrastructure	2	2	1	4	3	3
Government / City Council	2	1	-	2	1	-
Renewable power sources	1	1	2	5	5	4
Drought / Water availability	1	-	-	0	-	-
Natural disaster / Preparedness	0	-	-	-	-	-
All of the above	0	0	-	-	0	-
Miscellaneous	5	5	6	6	4	4
Refused / None	6	5	3	-	1	5

Q26. And thinking about the issue you named as most important, how would you compare the importance of that issue to the importance of having a dependable utility service? Would you say the issue you named is more or less important than a dependable utility? Much or somewhat?

	2015 Total	2014 Total	2013 Total
Total Participants	901	1308	1065
More important	44%	48%	44%
Much more important	23	24	25
Somewhat	21	25	20
No difference	35%	34%	36%
The same (no difference)	35	34	36
Less important	13%	11%	13%
Somewhat less important	9	8	10
Much less important	4	3	4
Refused / Unsure	8%	7%	6%

A majority of customers tended to think that climate change and the environment were more important issues than having a dependable utility, while around half indicated that affordable utility rates and a clean water supply were about the same level of importance. Those who listed homelessness or crime as the most important issues were the most likely to think that a dependable utility was more important than those issues.

	Total	Jobs/Unem ployment	Education	Home- lessness	Crime	Climate change	Economy	Clean water supply	Environment	Affordable utility rates
Total Participants	901	123	107	105	97	96	69	57	52	48
More important	44%	41%	50%	41%	47%	64%	42%	32%	54%	25%
Much more important	23	20	21	23	23	44	16	19	25	17
Somewhat more important	21	21	29	18	25	20	26	12	29	8
Same	35%	39%	36%	29%	26%	25%	39%	47%	29%	58%
The same / no difference	35	39	36	29	26	25	39	47	29	58
Less important	13%	10%	10%	22%	18%	5%	10%	9%	10%	10%
Somewhat less important	9	8	7	17	9	4	9	9	8	4
Much less important	4	2	4	5	8	1	1	-	2	6
Unsure	8%	10%	3%	9%	9%	6%	9%	12%	8%	6%

Q27. Have you or someone in your household contacted EWEB in the last 6 months for any reason?

About one-quarter of respondents have contacted EWEB in the past six months (28%), while 65% had not.

Those who had been a customer for 16 or more years were more likely than others to have contacted EWEB (36%), along with those who live in ward E3 (48%).

	2015 Total	2014 Total	2013 Total
Total Participants	952	1380	1057
Yes	28%	35%	35%
No	65	55	58
Don't recall / Unsure	7	10	7

Q28. (If have contacted EWEB) What was the reason for the last time you or someone in your household contacted EWEB? (Unaided, Multiple Responses)

About one-quarter of customers called to *start/stop/change their service*, and about one-fifth called with a *question about billing*. Many also called to *make a payment* or *report an outage*.

	2015 Total	2014 Total	2013 Total	2011 Total
Total Participants	264	487	375	406
Start / stop / change service	27%	17%	7%	20%
Ask question about billing	22	25	29	-
Make a payment	12	10	14	-
Power outage	10	17	9	9
Rebates	7	5	3	3
Need assistance	6	1	-	-
Water service / leak	5	7	7	5
Report an issue (trees ¹⁷)	5	6	5	3
Installations / info on new equipment	5	2	-	-
Emergency water containers	5	1	-	-
New bill pay system	3	6	22	-
Complaint / Problem about bill	3	5	10	6
Conservation programs: Electric ¹⁸	2	5	7	6
Conservation programs: Water	2	5	7	6
Complaint / Problem about water service	2	2	2	-
Complaint / Problem about electric service	2	2	2	-
Backflow testing	2	1	-	-
Billing/Payment ¹⁹	-	-	-	20
Miscellaneous	6	5	9	6
Refused	1	0	1	-

¹⁷ In 2011 “Trees” was its own answer choice, whereas in 2013 it was coded under “Report an issue.”

¹⁸ In 2015, “conservation programs: was separated into “Electric” and “Water.” The 2011-2014 data includes combined conservation programs.

¹⁹ In 2011 Billing/Payment were combined, whereas in 2013 they were separated.

Q29. (If have contacted EWEB) Based on that last contact with EWEB, how would you rate the overall satisfaction with the service you received, on a scale of “0” to “10”, where “0” is not at all satisfied and “10” is very satisfied?

Customers were satisfied with the response they received, rating their satisfaction a mean of 8.0 (on a scale where “10” is “very satisfied”).

Satisfaction increased from 2014, moving from a rating of 7.6 to 8.0.

Residents of ward E3 had the lowest satisfaction (7.4), and were also the most likely to have called EWEB with an issue.

	2015 Total	2014 Total	2013 Total	2011 Total
Total Participants	264	487	375	406
0 - Not at all satisfied	5%	6%	6%	1%
1	2	2	1	1
2	2	4	3	0
3	4	2	3	1
4	2	3	3	0
5	5	4	4	4
6	3	3	5	1
7	8	7	10	6
8	5	11	11	16
9	15	18	15	14
10 - Very satisfied	51	38	38	48
Unsure / Unfamiliar / Refused	1	1	1	7
Mean	8.0	7.6	7.6	8.8

Customers who called to ask about *installations or get information on new equipment* were extremely satisfied with the customer service they received. Those who called to *start/stop/change service*, about *water service/leaks*, or *rebates*, were also very satisfied with the service. Satisfaction was lowest among those who called because they *needed assistance* or to *report an issue*.

	Total	Installation	Start/Stop service	Water service/ Leak	Rebates	Make a payment	Ask question re: billing	Emergency water containers	Power outage	Report an issue	Need assistance
Total Participants	264	14	72	13	18	32	57	13	26	13	16
Mean	8.0	9.6	8.8	8.7	8.6	8.1	8.0	7.2	7.1	6.4	6.3

Q30. Now I'd like to ask you about the bill you receive each month. Do you get your monthly EWEB bill in the postal mail or through EWEB's paperless "e-billing" service?

Just over half of customers use EWEB's eBilling service (57%), while 42% use the postal mail, comparable to 2014.

The likelihood to receive a bill through the postal mail increases with age.

	2015 Total	2014 Total
Total Participants	949	1380
E-billing service	57%	59%
Postal mail	42	37
Unsure	1	4

Q31. Would you say you generally: (Aided, Single Response)

Just over half of customers *read the bill carefully each month* (57%), 22% *look at the amount due*, and 17% *only occasionally look at the bill*; just 5% rarely or never look at it.

The proportion of respondents indicating they read the bill carefully each month decreased from 2014.

Younger customers (ages 18-49) were the least likely to read their bill carefully each month, along with newer customers.

	2015 Total	2014 Total
Total Participants	948	1366
Read the bill carefully each month	57%	63%
Just look at the total amount due	22	18
Only occasionally look at the bill	17	18
Rarely or never look at the bill	5	1
Refused	0	0

Q31b. (If at least occasionally) Do you find the bill: (Aided)

The majority of those who look at their bill at least occasionally find it *easy to understand* (73%), while 19% find it *sometimes confusing*, and just 2% feel it is *difficult to understand*. This is comparable to 2014.

Younger respondents were more likely than others to feel that the bill was sometimes confusing.

	2015 Total	2014 Total
Total Participants	927	1304
Easy to understand	73%	74%
Sometimes confusing	19	20
Difficult to understand	2	3
Unsure / Don't recall	6	3

Q31c. In terms of the look of the bill, what features do you like or not like about it? (Open-ended verbatim)

Many customers said the bill was simple and easy to understand, and they liked being able to compare the usage across the months. Some felt the water usage information was hard to understand, and some said the breakdown of costs could be confusing. Refer to the verbatim appendix for full list of responses.

Q32. I'd like to read a list of ways that EWEB typically communicates with its customers. After each, please tell me if you regularly, occasionally, or rarely utilize that form of communication to interact with or learn about EWEB.

Messages printed directly in your bill and brochures inserted directly into your billing or links in your eBill email were the most-used forms of communication with EWEB (59% and 53%, respectively). EWEB employees and social media were the least-utilized resources.

Utilization of resources has remained comparable to 2014, with the only notable change being a decrease in the proportion of respondents mentioning *newspaper stories*.

In general, older customers tend to be more likely than younger customers to regularly refer to *messages on their bills, brochures inserted in their billing, Pipeline, TV stories, and newspaper stories*. *Pipeline, TV stories, and newspaper stories* are more regularly utilized by longer-term customers than by newer customers.

Percentage answering "Regularly" and "Occasionally"	2015 Total	2014 Total	2013 Total	2012 ²⁰ Total	2011 Total
a. Messages printed directly on your bill	59%	57%	58%	64%	66%
b. Brochures in your billing or links in your eBill email	53	52	50	65	70
c. Email or e-newsletters	45	46	50	25	24
d. TV news stories	44	48	54	42	41
e. Pipeline newsletter	43	44	29	49	53
f. Newspaper stories	43	50	56	55	52
g. EWEB's web site	34	33	39	34	34
h. Exhibits at community events	34	32	25	25	28
i. Radio news or ads	30	29	30	28	18
j. Newspaper advertisement	22	26	28	38	-
k. Employees	15	17	26	22	19
l. Facebook Twitter, or YouTube	12	9	6	5	1

2015: All responses	Regularly	Occasionally	Rarely/ Never	Unsure
a. Messages printed directly on your bill	29%	30%	36%	6%
b. Brochures in your billing or links in your eBill email	19	34	42	4
c. Email or e-newsletters	13	32	51	4
d. TV news stories	10	34	51	5
e. Pipeline newsletter	14	29	49	9
f. Newspaper stories	13	30	52	5
g. EWEB's web site	6	28	62	4
h. Exhibits at community events	4	29	62	5
i. Radio news or ads	6	24	65	5
j. Newspaper advertisement	4	18	72	6
k. Employees	3	12	77	7
l. Facebook Twitter, or YouTube	3	9	80	9

²⁰ Percentage answering they do use that method of communication

Q33. And what is your most preferred way to receive information or interact with EWEB? (Single Response)

Email or e-newsletters were the most-preferred way to interact with EWEB (35%), followed by messages printed directly in the bills (19%), postal mail (13%), and brochures inserted into billing or links provided in the eBill email (10%).

Preferences have remained largely the same from 2014.

The likelihood to prefer emails decreased with age.

	2015 Total	2014 Total	2013 Total
Total Participants	939	1354	1048
Email or e-newsletters	35%	37%	39%
Messages printed directly on your bill ²¹	19	17	16
Postal mail	13	10	3
Brochures inserted into your billing or links provided in your eBill email ²²	10	9	16
Phone call	5	5	3
Pipeline newsletter	3	4	2
EWEB's website	4	4	6
Newspaper stories	1	3	4
Facebook, Twitter, or YouTube	1	1	1
Newspapers ads	0	1	0
Exhibits at community events ²³	1	1	0
TV news stories	2	1	3
Employees	0	1	2
Radio news or ads	1	0	1
Miscellaneous	1	2	1
None	-	1	-
Don't know / Refused	2	4	1

²¹ 2013 worded as "Bill messages"

²² 2013 worded as "Bill inserts"

²³ 2013 worded as "Booths at events"

Q34. When receiving information about things such as outages or service updates, through which of the following ways would you prefer to be notified? (Aided, Multiple Responses)

About half of customers would prefer a *text message* when receiving updates from EWEB (43%), followed by *emails* (43%), and a phone call either to their *cell phone* (26%) or *landline* (16%).

The proportion of respondents indicating a preference for *text message* increased significantly from 2014, and there was also a small increase for the preference of *cell phones*. The proportion preferring *emails* and *landlines* decreased slightly.

Text messages were the top-preference for most customers. However, an equal or higher proportion of males, customers ages 65 and older, those with natural gas heating, and residents of wards E2 and E3 prefer emails.

	2015 Total	2014 Total
Total Participants	939	1356
Text message	50%	36%
Email	43	47
Cell phone	26	20
Telephone landline	16	24
Secure website	4	4
Refused	2	4

Q35. Would you say the information you receive from EWEB is generally very useful, somewhat useful, not very useful, or not useful at all?

The vast majority of customers feel the information they receive from EWEB is *useful* (81%), including 20% who feel it is *very useful*. Just 9% feel the information is *not useful*, and 10% are *unsure*.

The proportion of respondents who feel that the information they receive from EWEB is *useful* increased by 4% from 2014.

The proportion of customers who didn't consider EWEB's communications to be useful increased with the number of years they've been a customer.

	2015 Total	2014 Total	2013 Total
Total Participants	938	1356	1048
Useful	81%	77%	76%
Very useful	20	18	19
Somewhat useful	61	59	57
Not useful	9%	12%	17%
Not very useful	7	9	14
Not useful at all	3	3	3
Don't know / No response	10%	11%	7%
Don't know / Refused	10	11	7

Q35b. How could EWEB improve the usefulness of their information? What other information could they provide? (Open-ended verbatim)

Some customers recommended tips on how to conserve energy, and peak time of use information. Some said the information didn't feel relevant to them: for instance, some renters received information about home-owner programs. Refer to the verbatim appendix for full list of responses.

Q36. Are you aware that EWEB now offers an outage texting service in which you can report outages and request updates on outages?

The vast majority of customers were not aware of this service (79%), while 16% were aware.

	2015 Total
Total Participants	938
Yes	16%
No	79
Don't know / Refused	4

Q36b. If you've had an occasion to use this service, did you find the service to be useful?

While about three-quarters of customers had not used the outage texting service, those who have used it generally found it useful.

	2015 Total
Total Participants	599
Have not used	72%
Very useful	5
Somewhat useful	6
Not very useful	1
Not useful at all	1
Don't know / Refused	15



RESULTS: CUSTOMER CHARACTERISTICS

Q37a. Do you have any gas-fueled appliances in your home?

About one-third of respondents have gas-heated appliances (36%), while 63% do not. The proportion of those with gas-heated appliances is slightly lower than in 2014, though it remains comparable.

Gas-fueled appliances were most common among males, those ages 50-64, households with two or more residents, home owners, college graduates, those who receive both water and electricity through EWEB, and those who have been a customer for 6-15 years. Additionally, those in wards E3, E4, and E8 were more likely than others to have gas-fueled appliances.

	2015 Total	2014 Total
Total Participants	907	1266
Yes	36%	40%
No	63	58
Don't know / Refused	0	3

Q37b. (If have gas-fueled appliances) Which appliances do you have? (Aided, Multiple Responses)

About three-fifths of those with gas-heated appliances have a *gas range and oven* (59%), and around half have a *gas furnace* (51%), and a *gas fireplace* (46%).

The proportion of those with a *gas range and oven*, and those with a *gas water heater* decreased from 2014.

	2015 Total	2014 Total
Total Participants	332	502
Gas Range & Oven	59%	69%
Gas Furnace (forced air system)	51	54
Gas Fireplace	46	49
Gas Water Heater (w/ tank or "instant")	26	60
Gas Clothes Dryer	18	15
Heat Pump (w/ Gas Furnace Back Up)	15	17
Gas Grill (hard lined, not tank)	10	15
Gas Room Heaters	2	5
Gas Washing Machine	5	3
Gas Swimming Pool/Hot tub Heater	3	2
Gas range only	3	1
Other (lighting, hydronic heating, warming drawers)	0	2

Q38. What is your primary source of heating for your home? (Aided)

Nearly three-quarters of respondents have *electric heat* for their home's primary heat source, while about one-quarter have *natural gas*.

A slightly larger proportion of respondents indicated they had *electric heat* in 2015 than in 2014.

	2015 Total	2014 Total	2013 Total	2012 Total	2011 Total
Total Participants	936	1354	1040	412	406
Electric	72%	67%	65%	69%	68%
Natural gas	23	25	27	21	21
Miscellaneous	4	4	5	7	9
Refused	1	4	4	2	2

Q39a. (If not Natural Gas) Would you say you are very likely, somewhat likely, or not at all likely to switch to natural gas heating for your home in the next two years?

The majority of those whose primary source of heating is electric were *not at all likely* to switch to natural gas (85%). Of the remaining respondents, 12% were *somewhat likely* and 3% were *very likely*.

	2015 Total	2014 Total
Total Participants	683	920
Very likely	3%	4%
Somewhat likely	12	13
Not at all likely	85	83
Refused	0	0

Q39b. (If Natural Gas) About how many years have you had natural gas heating for your home?

Those whose primary source of heat is natural gas have had it for a mean of 14 years, comparable to in 2014.

	2015 Total	2014 Total
Total Participants	215	336
1-2 years	12%	12%
3-5 years	20	10
6-10 years	27	23
11-19 years	25	24
20 or more years	16	32
Mean	13 years	15 years

Q40. Are you aware that 88% of EWEB power comes from renewable, fossil-free power generation resources, such as hydro, solar, and wind?

Just over one-third of respondents were *aware* that 88% of EWEB's power comes from renewable sources (37%), while 56% were *not aware*, and 7% were *unsure*.

	2015 Total
Total Participants	470
Yes	37%
No	56
Don't know / Refused	7



RESULTS: DEMOGRAPHICS

Q41. About how many years have you been an EWEB customer?

The 2015 survey included a higher proportion of newer customers than in previous years (41% who have been with EWEB for 1-5 years, compared to 27% in 2014), with a mean of 10 years vs. 19 years.

	2015 Total	2014 Total	2013 Total	2012 Total	2011 Total
Total Participants	935	1351	1038	412	406
1 year	13%	10%	0%	-	-
2-5 years ²⁴	28	17	16	26%	28%
6-10 years	25	15	14	17	17
11-15 years	16	9	9	10	12
16 or more years	16	47	57	44	43
Refused	0	2	3	3	0
Mean	10	19	22	-	-

Q42. Do you own or rent your home?

The 2015 survey included a smaller proportion of owners than in 2014 (61% vs. 71%), and also lower than in 2013. The proportion is more comparable to that of 2011 and 2012.

	2015 Total	2014 Total	2013 Total	2012 Total	2011 Total
Total Participants	935	1351	1040	412	406
Own	61%	71%	81%	67%	66%
Rent	38	25	15	31	33
Refused	1	3	4	2	1

²⁴ 2011-2012 includes data for 1-5 years.

Q43. Including you, how many people live in your household?

The 2015 survey included a higher proportion of single-person households than in 2014 (33% vs. 26%).

	2015 Total	2014 Total	2013 Total	2012 Total	2011 Total
Total Participants	935	1351	1040	412	406
1	33%	26%	26%	19%	24%
2	38	45	46	37	41
3	11	12	13	16	12
4	10	8	7	18	16
5 or more	6	4	4	8	7
Refused	2	4	4	2	0

Q44. What is the highest level of education you've completed? (Aided)

	2015 Total	2014 Total	2013 Total	2012 Total	2011 Total
Total Participants	935	1351	1040	412	406
Some high school	1%	0%	0%	0%	10%
High school / GED	9	7	7	15	27
Some college	18	18	20	31	6
Trade / Vocational / Technical	3	4	4	2	32
College degree	32	32	33	28	22
Graduate degree or higher	34	33	29	21	2
Refused	2	6	6	3	1

Q45. What is your combined annual household income (before taxes)? (Aided)

	2015 Total	2014 Total	2013 Total	2012 Total	2011 Total
Total Participants	935	1351	1040	412	406
Less than \$30,000	25%	19%	15%	25%	28%
\$30-\$50,000	17	17	19	18	17
\$50-\$75,000	16	17	19	18	17
\$75-\$100,000	10	12	13	8	12
\$100,000 or more	16	14	13	13	10
Refused	17	22	21	18	16

Q46. Which of the following categories includes your age? (Aided)

The 2015 survey included a higher proportion of younger respondents (ages 18-49) than in 2014 (41% vs. 31%).

	2015 Total	2014 Total	2013 Total
Total Participants	935	1351	1040
18-34	21%	16%	8%
35-49	20	15	15
50-64	26	31	34
65 or older	29	31	36
Refused	4	7	7

Q47. Are you currently registered to vote in Oregon?

	2015 Total	2014 Total	2013 Total
Total Participants	935	1351	1040
Yes	86%	89%	91%
No	11	6	3
Refused	3	5	6

Gender

	2015 Total	2014 Total	2013 Total	2012 Total	2011 Total
Total Participants	894	1287	758	412	406
Male	43%	47%	49%	50%	49%
Female	57	53	51	50	51

Record Ward

	2015 Total	2014 Total	2013 Total	2012 Total	2011 Total
Total Participants	1109	1602	1287	412	406
E1	15%	14%	11%	11%	11%
E2	15	13	11	11	10
E3	6	9	5	12	11
E4	13	13	11	9	10
E5	16	14	12	10	11
E6	11	13	10	10	11
E7	11	13	11	10	10
E8	12	11	11	10	10
Not listed	0	0	18	16	16

Collection Method

	2015 Total	2014 Total	2013 Total
Total Participants	1109	1602	1287
Phone	26%	17%	21%
Online	74	83	79



APPENDIX: QUESTIONNAIRE

Hi, is [First name] available? I'm calling from Riley Research Associates on behalf of Eugene Water & Electric Board, or EWEB, with a survey about your satisfaction with their services. Are you able to speak to the service you receive from EWEB? (If no: determine primary contact. If yes: continue survey)

(As necessary) we aren't trying to sell you anything or change your service. We're an independent research firm that has been asked to assess customer satisfaction with EWEB's services. No one will contact you based on your participation, and all responses are confidential.

Q1. To start, does EWEB provide you with: (Read list)

- | | |
|--|--|
| <input type="checkbox"/> Electricity and water | <input type="checkbox"/> Neither electricity nor water (Discontinue) |
| <input type="checkbox"/> Electric service only | <input type="checkbox"/> (Refused - Discontinue) |
| <input type="checkbox"/> Water service only | |

Q2. Are you or is anyone in your household an employee of EWEB? (Clarify which as necessary)

- | | |
|---|---|
| <input type="checkbox"/> No | <input type="checkbox"/> Yes - Both self and household member |
| <input type="checkbox"/> Yes - Self | <input type="checkbox"/> (Refused) |
| <input type="checkbox"/> Yes - Household member | |

Q3. First, what comes to mind in terms of the type or quality of service EWEB provides? What else? (Your overall impression) (Be as specific as possible)

Q4. As you may know, EWEB is a publicly owned electric and water utility. As a public utility, EWEB does not operate to earn a profit or to serve the investment needs of stockholders. Instead, EWEB is chartered by the city of Eugene to serve the interests of citizens. Knowing this, would you consider having a public utility to be more valuable or less valuable than a private, investor-owned utility, or does it make no difference? (Much or somewhat?)

- | | |
|---|---|
| <input type="checkbox"/> Much more valuable | <input type="checkbox"/> Somewhat less valuable |
| <input type="checkbox"/> Somewhat more valuable | <input type="checkbox"/> Much less valuable |
| <input type="checkbox"/> (No different) | <input type="checkbox"/> (Unsure / Refused) |

Q4b. And why is that? (Be as specific as possible)

Q5. For this next set of questions, I'm going to read a program or service that EWEB provides, and ask you first how important that program is, then how satisfied you are with the program. We'll start with a scale of "0" to "10", where "0" is not at all important and "10" is very important. (Read and rotate list)

Q5a-a. How important is: EWEB's involvement in community events and activities

- | | |
|---|--|
| <input type="checkbox"/> 0 - Not at all important | <input type="checkbox"/> 6 |
| <input type="checkbox"/> 1 | <input type="checkbox"/> 7 |
| <input type="checkbox"/> 2 | <input type="checkbox"/> 8 |
| <input type="checkbox"/> 3 | <input type="checkbox"/> 9 |
| <input type="checkbox"/> 4 | <input type="checkbox"/> 10 - Very important |
| <input type="checkbox"/> 5 | <input type="checkbox"/> (Unsure / Unfamiliar / Refused) |

Q5b-a. How satisfied are you with: EWEB's involvement in community events and activities

- | | |
|---|--|
| <input type="checkbox"/> 0 - Not at all satisfied | <input type="checkbox"/> 6 |
| <input type="checkbox"/> 1 | <input type="checkbox"/> 7 |
| <input type="checkbox"/> 2 | <input type="checkbox"/> 8 |
| <input type="checkbox"/> 3 | <input type="checkbox"/> 9 |
| <input type="checkbox"/> 4 | <input type="checkbox"/> 10 - Very satisfied |
| <input type="checkbox"/> 5 | <input type="checkbox"/> (Unsure / Unfamiliar / Refused) |

Q5a-b. How important is: EWEB's efforts to protect the environment

Q5b-b. How satisfied are you with: EWEB's efforts to protect the environment

Q5a-c. How important is: EWEB's consumer energy conservation and efficiency programs

Q5b-c. How satisfied are you with: EWEB's consumer energy conservation and efficiency programs

Q5a-d. How important is: EWEB's water conservation and efficiency programs

Q5b-d. How satisfied are you with: EWEB's water conservation and efficiency programs

Q5a-e. How important is: Protection of drinking water sources

Q5b-e. How satisfied are you with: Protection of drinking water sources

Q6a: And moving on... What is the source of Eugene's drinking water? (Read list, multiple responses)

- | | |
|--|---|
| <input type="checkbox"/> Groundwater wells | <input type="checkbox"/> McKenzie River |
| <input type="checkbox"/> Main stem of the Willamette River | <input type="checkbox"/> Another source |
| <input type="checkbox"/> Middle fork of the Willamette River | <input type="checkbox"/> (Don't know) |
| <input type="checkbox"/> Willamette River in general | |

Q6a-b. Other sources/comments (online survey)

Q6b. EWEB currently relies on only one source of drinking water, the McKenzie River. In order to ensure safe and reliable water supplies, EWEB is looking at additional sources. Would you say you were currently very aware, somewhat aware, or not aware that EWEB is planning to diversify and add alternate water sources?

Very aware

Somewhat aware

Not aware

(Unsure/Refused)

Q6c. How important is it that EWEB has a plan to diversify and add alternate water sources? Would you say very important, somewhat important, or not important?

Very important

Somewhat important

Not important

(Unsure)

Q7a. And again using those same scales of “0” to “10”, I’d like to ask how important some aspects of EWEB’s customer service are to you, and then your satisfaction with those same aspects. (Read and rotate list)

Q7a-a. How important is: EWEB’s efforts in keeping customers informed

0 - Not at all important

1

2

3

4

5

6

7

8

9

10 - Very important

(Unsure / Unfamiliar / Refused)

Q7b-a. How satisfied are you with: EWEB’s efforts in keeping customers informed

0 - Not at all satisfied

1

2

3

4

5

6

7

8

9

10 - Very satisfied

(Unsure / Unfamiliar / Refused)

Q7a-b. How important is: EWEB’s responsiveness to customers’ needs and concerns

Q7b-b. How satisfied are you with: EWEB’s responsiveness to customers’ needs and concerns

Q7a-c. How important is: EWEB’s efforts to control costs

Q7b-c. How satisfied are you with: EWEB’s efforts to control costs

Q7a-d. How important is: EWEB’s electric service delivery and outage restoration

Q7b-d. How satisfied are you with: EWEB’s electric service delivery and outage restoration

Q7a-e. How important is: EWEB’s drinking water quality

Q7b-e. How satisfied are you with: EWEB’s drinking water quality

Q7a-f. How important is: EWEB’s water service reliability

Q7b-f. How satisfied are you with: EWEB’s water service reliability

Q7b-g. How satisfied are you with: EWEB Overall

Q8a. Thinking about the service you receive from EWEB, what do you think they do best in terms of either the type or quality of service they provide? (Be as specific as possible)

Q8b. And in what ways could EWEB improve? (If necessary) Besides cost (Be as specific as possible)

Q9a. Now I've got some questions about the programs EWEB offers. EWEB offers rebates and no- or low-interest loan programs for many home improvements that can help customers reduce energy and water use and save money on their utility bills. Which of these programs that EWEB offers, if any, have you utilized in the past two years? (Unaided, but clarify response as necessary. Multiple responses)

- | | |
|--|--|
| <input type="checkbox"/> Ducted heat pumps | <input type="checkbox"/> High efficiency toilets |
| <input type="checkbox"/> Ductless heat pumps | <input type="checkbox"/> Sprinkler timer rebates |
| <input type="checkbox"/> Heat pump water heaters | <input type="checkbox"/> Solar |
| <input type="checkbox"/> New home construction programs | <input type="checkbox"/> Rebates (other general appliance) |
| <input type="checkbox"/> Limited income assistance program | <input type="checkbox"/> (Have not used / Renter) |
| <input type="checkbox"/> Weatherization program | <input type="checkbox"/> (None / Have not used any) |
| <input type="checkbox"/> Rental property resources | <input type="checkbox"/> Other (Specify) |
| <input type="checkbox"/> Heating and cooling system programs | <input type="checkbox"/> (Refused / Unsure) |

Q9b. Other rebates / loan programs

Q10. Regarding the rebates and no- or low- interest loan programs that have been available to EWEB customers, which, if any, have you found particularly useful or beneficial for electric or water? (Unaided, but clarify response as necessary. Multiple responses)

- | | |
|--|--|
| <input type="checkbox"/> Ducted heat pumps | <input type="checkbox"/> High efficiency toilets |
| <input type="checkbox"/> Ductless heat pumps | <input type="checkbox"/> Sprinkler timer rebates |
| <input type="checkbox"/> Heat pump water heaters | <input type="checkbox"/> Solar |
| <input type="checkbox"/> New home construction programs | <input type="checkbox"/> Rebates (other general appliance) |
| <input type="checkbox"/> Limited income assistance program | <input type="checkbox"/> (None are useful) |
| <input type="checkbox"/> Weatherization program | <input type="checkbox"/> Other (Specify) |
| <input type="checkbox"/> Rental property resources | <input type="checkbox"/> (Refused / Unsure) |
| <input type="checkbox"/> Heating and cooling system programs | |

Q10b. Other rebates / loan programs:

Q10c. Why haven't you participated in these programs? What could EWEB do or provide to make you more likely to participate in any of these programs?

Q11-Q16. For the following questions, I just tell me yes or no after each. Do you...

Q11. Use the eBilling paperless online billing system?

- Yes
- No

(Don't know / Refused)

Q11b. Why haven't you used the eBilling system? What could EWEB do to make that a more appealing option for you?

Q12. Are you interested in EWEB offering some new pricing options or plans in addition to its current tiered pricing structure?

- Yes
- No

(Don't know / Refused)

Q13. Have you ever contributed to the Customer Care program to help others who are struggling to pay their utility bills?

- Yes
- No

(Don't know / Refused)

Q14. Have you supported Greenpower with a voluntary contribution on your monthly bill?

- Yes
- No

(Don't know / Refused)

Q14b. Customers can support the EWEB Greenpower for as little as \$1.50 per month. What would make you more likely to make that contribution each month?

Q15. Do you have an irrigation/sprinkler system for your landscaping?

- Yes
- No

(Don't know / Refused)

Q16. Do you use air conditioning in your home?

- Yes
- No

(Don't know / Refused)

Q16b. Is that central air conditioning or a window unit?

- Central air conditioning (Built-in throughout entire house)
- Window unit(s)

Both

(Don't know / Refused)

Q17. Do you have solar panels on your home?

- Yes
- No

(Don't know / Refused)

Q18. How would you rate EWEB's participation in and support of solar power projects? Would you say:
(Read list)

- Too little
- About right
- Too much

Shouldn't participate or promote at all

(Not familiar / Unsure)

Q19. Would you say you are very familiar, somewhat familiar, or not familiar with Community Solar programs?

- | | |
|--|--|
| <input type="checkbox"/> Very familiar | <input type="checkbox"/> Not familiar / Never heard of |
| <input type="checkbox"/> Somewhat familiar | <input type="checkbox"/> (Don't know / Refused) |

Q20. Community Solar programs provide output credit and possible tax benefits to utility customers whose homes aren't well positioned to harness solar power, those who rent or may lack the financial capability of installing solar electric systems on their own homes.

Customers can either purchase solar panels in a common location, or they can buy specific output from existing solar panels.

How important is it to you that EWEB participates in community solar projects? (Read list)

- | | |
|---|--|
| <input type="checkbox"/> Very important | <input type="checkbox"/> Not important at all |
| <input type="checkbox"/> Somewhat important | <input type="checkbox"/> (Too unfamiliar to say) |
| <input type="checkbox"/> Not very important | <input type="checkbox"/> (Don't know / Refused) |

Q20b. How interested would you be in participating in this type of community solar project? (Read list)

- | | |
|--|--|
| <input type="checkbox"/> Very interested | <input type="checkbox"/> Not interested at all |
| <input type="checkbox"/> Somewhat interested | <input type="checkbox"/> (Too unfamiliar to say) |
| <input type="checkbox"/> Not very interested | <input type="checkbox"/> (Don't know / Refused) |

Q21. Do you own or lease an electric vehicle or hybrid? (If no) Do you plan to purchase or lease one in the next few years?

- | | |
|--|--|
| <input type="checkbox"/> Currently own/lease electric vehicle | <input type="checkbox"/> Plan to purchase/lease hybrid vehicle |
| <input type="checkbox"/> Currently own/lease hybrid vehicle | <input type="checkbox"/> No plans in the future |
| <input type="checkbox"/> Plan to purchase lease electric vehicle | <input type="checkbox"/> (Don't know / Refused) |

Q22. Now I'd like to ask some questions about so-called "Smart Meters." Many utilities have modernized with digital smart meters that are connected to the utility's information systems. These are intended to provide a more efficient system that helps improve service reliability and provides easier management of energy and water usage. Would you say you are very familiar, somewhat familiar, somewhat unfamiliar, or very unfamiliar with smart meters?

- | | |
|--|---|
| <input type="checkbox"/> Very familiar | <input type="checkbox"/> Very unfamiliar |
| <input type="checkbox"/> Somewhat familiar | <input type="checkbox"/> (Don't know / Refused) |
| <input type="checkbox"/> Somewhat unfamiliar | |

Q23. I'd like to read a list of services that may be offered through EWEB's modernization program. Please tell me if you find each feature very valuable, somewhat valuable, or not valuable. Services include: (Read and rotate list):

Q23a. Electric outage detection, which automatically reports an outage

(Would that feature be very valuable, somewhat valuable, or not at all valuable?)

- | | |
|--|---|
| <input type="checkbox"/> Very valuable | <input type="checkbox"/> (Don't know / Depends) |
| <input type="checkbox"/> Somewhat valuable | <input type="checkbox"/> (Refused) |
| <input type="checkbox"/> Not valuable | |

Q23b. Pre-pay to help you track and manage your monthly bills

(Would that feature be very valuable, somewhat valuable, or not at all valuable?)

- | | |
|--|---|
| <input type="checkbox"/> Very valuable | <input type="checkbox"/> (Don't know / Depends) |
| <input type="checkbox"/> Somewhat valuable | <input type="checkbox"/> (Refused) |
| <input type="checkbox"/> Not valuable | |

Q23c. Simpler account hookup and account transfer

(Would that feature be very valuable, somewhat valuable, or not at all valuable?)

- | | |
|--|---|
| <input type="checkbox"/> Very valuable | <input type="checkbox"/> (Don't know / Depends) |
| <input type="checkbox"/> Somewhat valuable | <input type="checkbox"/> (Refused) |
| <input type="checkbox"/> Not valuable | |

Q23d. Pricing programs for peak times of use

(Would that feature be very valuable, somewhat valuable, or not at all valuable?)

- | | |
|--|---|
| <input type="checkbox"/> Very valuable | <input type="checkbox"/> (Don't know / Depends) |
| <input type="checkbox"/> Somewhat valuable | <input type="checkbox"/> (Refused) |
| <input type="checkbox"/> Not valuable | |

Q23e. Access to your account information and outages through SmartPhones, Apps, text messages, or emails

(Would that feature be very valuable, somewhat valuable, or not at all valuable?)

- | | |
|--|---|
| <input type="checkbox"/> Very valuable | <input type="checkbox"/> (Don't know / Depends) |
| <input type="checkbox"/> Somewhat valuable | <input type="checkbox"/> (Refused) |
| <input type="checkbox"/> Not valuable | |

Q23f. Water leak detection

(Would that feature be very valuable, somewhat valuable, or not at all valuable?)

- | | |
|--|---|
| <input type="checkbox"/> Very valuable | <input type="checkbox"/> (Don't know / Depends) |
| <input type="checkbox"/> Somewhat valuable | <input type="checkbox"/> (Refused) |
| <input type="checkbox"/> Not valuable | |

Q23g. Remote meter-reading so employees no longer have to come to your home

(Would that feature be very valuable, somewhat valuable, or not at all valuable?)

- | | |
|--|---|
| <input type="checkbox"/> Very valuable | <input type="checkbox"/> (Don't know / Depends) |
| <input type="checkbox"/> Somewhat valuable | <input type="checkbox"/> (Refused) |
| <input type="checkbox"/> Not valuable | |

Q23h. Potential cost savings by being able to remotely manage your energy usage and avoid times of peak demand

(Would that feature be very valuable, somewhat valuable, or not at all valuable?)

- | | |
|--|---|
| <input type="checkbox"/> Very valuable | <input type="checkbox"/> (Don't know / Depends) |
| <input type="checkbox"/> Somewhat valuable | <input type="checkbox"/> (Refused) |
| <input type="checkbox"/> Not valuable | |

Q24a. Based on those features, and anything else you might know about smart meters, do you have a favorable or unfavorable opinion of EWEB's plan to modernize its systems and offer new services to customers who opt in? Strongly or somewhat?

- | | |
|---|---|
| <input type="checkbox"/> Strongly favorable | <input type="checkbox"/> Very unfavorable |
| <input type="checkbox"/> Somewhat favorable | <input type="checkbox"/> (Unsure / Refused) |
| <input type="checkbox"/> Somewhat unfavorable | |

Q24b. And why is that? (Be as specific as possible)

Q25a. Changing subjects, what would you say is the most important issue facing you or your community? What is the second most important issue? (Unaided, Indicate no more than two issues)

BOTH RESPONSES

- | | |
|--|--|
| <input type="checkbox"/> Crime | <input type="checkbox"/> Climate change |
| <input type="checkbox"/> Jobs / unemployment | <input type="checkbox"/> Government / City Council |
| <input type="checkbox"/> Education | <input type="checkbox"/> Economy / Cost of living / Affordable housing |
| <input type="checkbox"/> Homelessness | <input type="checkbox"/> Taxes |
| <input type="checkbox"/> Transportation infrastructure | <input type="checkbox"/> All of the above |
| <input type="checkbox"/> The environment | <input type="checkbox"/> Drought / Water availability |
| <input type="checkbox"/> Clean water supply | <input type="checkbox"/> Natural disaster / Preparedness |
| <input type="checkbox"/> Renewable power sources | <input type="checkbox"/> Other (specify) |
| <input type="checkbox"/> Affordable electric and water rates | <input type="checkbox"/> (Don't know / Refused) |
| <input type="checkbox"/> Conservation: Energy/water | |

Q25a. Changing subjects, what would you say is the most important issue facing you or your community? What is the second most important issue?

MOST IMPORTANT ISSUE

- | | |
|--|--|
| <input type="checkbox"/> Crime | <input type="checkbox"/> Climate change |
| <input type="checkbox"/> Jobs / unemployment | <input type="checkbox"/> Government / City Council |
| <input type="checkbox"/> Education | <input type="checkbox"/> Economy / Cost of living / Affordable housing |
| <input type="checkbox"/> Homelessness | <input type="checkbox"/> Taxes |
| <input type="checkbox"/> Transportation infrastructure | <input type="checkbox"/> All of the above |
| <input type="checkbox"/> The environment | <input type="checkbox"/> Drought / Water availability |
| <input type="checkbox"/> Clean water supply | <input type="checkbox"/> Natural disaster / Preparedness |
| <input type="checkbox"/> Renewable power sources | <input type="checkbox"/> Other (specify) |
| <input type="checkbox"/> Affordable electric and water rates | <input type="checkbox"/> (Don't know / Refused) |
| <input type="checkbox"/> Conservation: Energy/water | |

Q25b. Other issue

Q25a. Changing subjects, what would you say is the most important issue facing you or your community? What is the second most important issue?

SECOND MOST IMPORTANT ISSUE

- | | |
|--|--|
| <input type="checkbox"/> Crime | <input type="checkbox"/> Climate change |
| <input type="checkbox"/> Jobs / unemployment | <input type="checkbox"/> Government / City Council |
| <input type="checkbox"/> Education | <input type="checkbox"/> Economy / Cost of living / Affordable housing |
| <input type="checkbox"/> Homelessness | <input type="checkbox"/> Taxes |
| <input type="checkbox"/> Transportation infrastructure | <input type="checkbox"/> All of the above |
| <input type="checkbox"/> The environment | <input type="checkbox"/> Drought / Water availability |
| <input type="checkbox"/> Clean water supply | <input type="checkbox"/> Natural disaster / Preparedness |
| <input type="checkbox"/> Renewable power sources | <input type="checkbox"/> Other (specify) |
| <input type="checkbox"/> Affordable electric and water rates | <input type="checkbox"/> (Don't know / Refused) |
| <input type="checkbox"/> Conservation: Energy/water | |

Q25b. Second-most important issue

Q26. And thinking about the issue you named as most important, how would you compare the importance of that issue to the importance of having a dependable utility service?

Would you say the issue you named is more or less important than a dependable utility? Much or somewhat?

- | | |
|---|--|
| <input type="checkbox"/> Much more important | <input type="checkbox"/> Somewhat less important |
| <input type="checkbox"/> Somewhat more important | <input type="checkbox"/> Much less important |
| <input type="checkbox"/> The same (no difference) | <input type="checkbox"/> (Refused / Unsure) |

Q27. And now some questions about the communication you receive from EWEB. Have you or someone in your household contacted EWEB in the last 6 months for any reason?

- Yes
- No
- (Don't recall / Unsure)

Q28. What was the reason for the last time you or someone in your household contacted EWEB?
(Unaided, multiple responses)

- Make a payment
- Ask question about billing / Update
- Complaint / Problem about bill
- Complaint / Problem about water service
- Complaint / Problem about electric service
- Start / stop / change service
- Conservation programs - Electric
- Conservation programs - Water
- Rebates
- Power outage
- Water service / leak
- New bill pay system
- Report an issue
- Need assistance
- Installations / info on new equipment
- Water bottles
- Backflow testing
- Other (specify)
- (Refused)

Q28b. Other

Q29. Based on that last contact with EWEB, how would you rate the overall satisfaction with the service you received, on a scale of "0" to "10", where "0" is not at all satisfied and "10" is very satisfied?

- 0 - Not at all satisfied
- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10 - Very satisfied
- (Unsure / Unfamiliar / Refused)

Q30. Now I'd like to ask you about the bill you receive each month. Do you get your monthly EWEB bill in the postal mail or through EWEB's paperless "e-billing" service?

- Postal mail
- E-billing service
- (Unsure)

Q31. Would you say you generally: (Read list. Single response)

- Read the bill carefully each month
- Just look at the total amount due
- Only occasionally look at the bill
- Rarely or never look at the bill
- (Refused)

Q31b. Do you find the bill: (Read list)

- Easy to understand
- Sometimes confusing

- Difficult to understand
- (Unsure / Don't recall)

Q31c. In terms of the look of the bill, what features do you like or not like about it? (Be as specific as possible. Specify if good or bad feature)

Q32. I'd like to read a list of ways that EWEB typically communicates with its customers. After each, please tell me if you regularly, occasionally, or rarely utilize that form of communication to interact with or learn about EWEB. The first is: (read and rotate)

Q32a. Messages printed directly on your bill

- Regularly
- Occasionally

- Rarely/Never
- (Don't know / Refused)

Q32b. Brochures inserted into your billing or links provided in your eBill email

Q32c. Pipeline newsletter

Q32d. EWEB's web site

Q32e. Newspaper ads

Q32f. Newspaper stories

Q32g. TV news stories

Q32h. Radio news or ads

Q32i. Exhibits at community events

Q32j. EWEB Employees

Q32k. Facebook, Twitter, or YouTube

Q32l. Email or e-newsletters

Q33. And what is your most preferred way to receive information from or interact with EWEB? (Single response, help as necessary)

- Messages printed directly on your bill
- Brochures inserted into your billing or links provided in your eBill email
- Pipeline newsletter
- EWEB's web site
- Newspapers ads
- Newspaper stories
- TV news stories
- Radio news or ads
- Exhibits at community events

- Employees
- Facebook, Twitter, or YouTube
- Email or e-newsletters
- Postal mail
- Phone call
- (None)
- Other (specify)
- (Don't know / Refused)

Q33b. Other

Q34. When receiving information about things such as outages or service updates, through which of the following ways would you prefer to be notified? (Read list; multiple responses)

- Telephone landline
- Cell phone
- Text message

- Email
- Secure website
- (Refused)

Q35. Would you say the information you receive from EWEB is generally very useful, somewhat useful, not very useful, or not useful at all?

- | | |
|--|---|
| <input type="checkbox"/> Very useful | <input type="checkbox"/> Not useful at all |
| <input type="checkbox"/> Somewhat useful | <input type="checkbox"/> (Don't know / Refused) |
| <input type="checkbox"/> Not very useful | |

Q35b. How could EWEB improve the usefulness of their information? What other information could they provide? (Be as specific as possible)

Q36. Are you aware that EWEB now offers an outage texting service in which you can report outages and request updates on outages?

- | | |
|------------------------------|---|
| <input type="checkbox"/> Yes | <input type="checkbox"/> (Don't know / Refused) |
| <input type="checkbox"/> No | |

Q36b. If you've had an occasion to use this service, did you find the service to be useful? (Clarify response: Very/Somewhat) CAN select both "have not used" and other response.

- | | |
|--|---|
| <input type="checkbox"/> Have not used | <input type="checkbox"/> Not very useful |
| <input type="checkbox"/> Very useful | <input type="checkbox"/> Not useful at all |
| <input type="checkbox"/> Somewhat useful | <input type="checkbox"/> (Don't know / Refused) |

Q37a. And now I have a few questions about your heating sources. Do you have any gas-fueled appliances in your home?

- | | |
|------------------------------|---|
| <input type="checkbox"/> Yes | <input type="checkbox"/> (Don't know / Refused) |
| <input type="checkbox"/> No | |

Q37b. Which appliances are gas-fueled? (Read list as necessary, select all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Range & Oven | <input type="checkbox"/> Furnace (forced air system) |
| <input type="checkbox"/> Range only | <input type="checkbox"/> Heat Pump (w/ Gas Furnace Back Up) |
| <input type="checkbox"/> Water Heater (w/ tank or "instant") | <input type="checkbox"/> Fireplace |
| <input type="checkbox"/> Washing Machine | <input type="checkbox"/> Room Heaters |
| <input type="checkbox"/> Clothes Dryer | <input type="checkbox"/> Other (lighting, hydronic heating, warming drawers) (Specify) |
| <input type="checkbox"/> Swimming Pool/Hot tub Heater | <input type="checkbox"/> (Refused) |
| <input type="checkbox"/> Grill (hard lined, not tank) | |

Q37c. Other appliances

Q38. What is your primary source of heating for your home? (Read list as necessary)

- | | |
|--------------------------------------|------------------------------------|
| <input type="checkbox"/> Electric | <input type="checkbox"/> Other |
| <input type="checkbox"/> Natural Gas | <input type="checkbox"/> (Refused) |

Q39a. Would you say you are very likely, somewhat likely, or not at all likely switch to natural gas heating for your home in the next two years?

- Very likely
 Somewhat likely
 Not at all likely
 (Refused)

Q39b. About how many years have you had natural gas heating for your home? (As necessary) Your best guess is fine. (Enter whole number of years; round up if necessary. Enter 99 if refused).

Years ____

Q39b. Categorized

- 1-2 years
 3-5 years
 6-10 years
 11-19 years
 20 or more years
 Refused

Q40. Are you aware that 88% of EWEB power comes from renewable, fossil-free power generation resources, such as hydro, solar, and wind? (The balance is non-renewable based on the mix of resources in power EWEB purchases from the Bonneville Power Authority.)

- Yes
 No
 (Don't know / Refused)

Q41. I'd like to finish up with a few demographic questions. About how many years have you been an EWEB customer? (Your best estimate is fine) (Enter 999 for refused, enter 1 if less than one year)

Years ____

Q41b. Categorized

- 1 year
 2-5 years
 6-10 years
 11-15 years
 16 or more years
 Refused

Q42. Do you own or rent your home?

- Own
 Rent
 (Refused)

Q43. Including you, how many people live in your household?

- 1
 2
 3
 4
 5 or more
 (Refused)

Q44. What is the highest level of education you've completed? (Read list as necessary)

- Some high school
 High school / GED
 Some college
 Trade / Vocational / Technical
 College degree
 Graduate degree or higher
 (Refused)

Q45. What is your combined annual household income (before taxes)? (Read list as necessary)

- Less than \$30,000
- \$30-\$50,000
- \$50-\$75,000

- \$75-\$100,000
- \$100,000 or more
- (Refused)

Q46. Which of the following categories includes your age? (Read list)

- 18-34
- 35-49
- 50-64

- 65 or older
- (Refused)

Q47. Are you currently registered to vote in Oregon?

- Yes
- No

- (Refused)

Those were all my questions. Thank you for your time and opinions!

Record gender

- Male

- Female

Record phone number

Record Zip Code (first 5 digits)

Record Ward

- E1
- E2
- E3
- E4
- E5

- E6
- E7
- E8
- Not listed

Q3. What comes to mind in terms of the type or quality of service EWEB provides?

- Dependable / Reliable / Consistent
- Positive (general)
- Expensive
- Good / Great
- Satisfactory / No complaints / Issues / Probles
- Negative (general)
- Fine / OK
- Excellent
- Good / Great service

- Adequate / Average / Basic
- Water and electric utility
- Monopoly
- Efficient
- Clean water
- Necessary
- Quality / High quality service
- Miscellaneous