

# ONWASA CUSTOMER SATISFACTION SURVEY

(PAR #301019)

*Presented to:*



*Presented by:*



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April 12, 2019

# Background/Objectives

## Background

Onslow Water & Sewer Authority (ONWASA) is interested in measuring customer satisfaction. To accomplish this, a web survey was conducted with ONWASA customers. The baseline results were completed in 2017 and this report represents the first subsequent measure 24 months later.

## Objectives

Primary objectives of this research are as follows:

- How satisfied are customers with service received from ONWASA?
- How do customers prefer to receive communication from ONWASA?
- How do customers prefer to pay their bill?

## Action Criteria

Findings from this study will be used to determine marketing efforts going forward.

# Method/Sample

## Method

ONWASA sent email invitations to their customers with the link to the survey. PAR hosted the survey and collected responses.

## Sample Composition

A random sample of 8,171 customers (net received email) were given the opportunity to participate in the survey. Respondents were required to be responsible for paying their water/sewer bill or contacting ONWASA with issues regarding their bill or services. In total 736 customers completed the survey (735 residential and 1 commercial). Details are as follows:

| Response Rate | April 2017 | April 2019 |
|---------------|------------|------------|
| Emails Sent   | 4,001      | 8,171      |
| Responses     | 408        | 736        |
| Response Rate | 10.2%      | 9.0%       |



# Dates/Sampling Error

## Study Dates

|                        |                          |
|------------------------|--------------------------|
| Materials Development: | March 14 – 28, 2019      |
| Data Collection:       | March 29 – April 5, 2019 |
| Analysis:              | April 8 – 11, 2019       |
| Final Report:          | April 12, 2019           |

## Sampling Error

Given a sample of 736 respondents and measuring this group at the 95% confidence level, the sampling error would be approximately  $\pm 3.6\%$ .

The base for all charts/graphs shown in the report includes all respondents (736) unless noted.

# **KEY FINDINGS/ IMPLICATIONS**



# Key Findings

## Satisfaction with ONWASA is Slightly Higher than 2017

- Eight in ten are satisfied with ONWASA overall, and fifteen percent are dissatisfied. Sixty-three percent are very satisfied compared to 54% from the 2017 wave.
- Satisfaction with ONWASA *employees* is also slight higher – eight in ten are satisfied and fourteen percent are dissatisfied with ONWASA employees (among those who have interacted with employees in the past year).

## Strengths/Opportunities for Improvement

- Primary *company* strengths are the water's *safety, clearness, and being odor free*, while there appears to be an opportunity to reduce or eliminate the water's chemical taste/aftertaste.
- Key *employee* strengths appear to be *clear speech, professionalism, and politeness*. Problem resolution may still present an area to improve upon, but is improved from 2017.

# Key Findings

## **Communication Preferences are Similar to 2017**

- Regardless of the urgency of the message, ONWASA customers prefer to receive communication primarily via email and/or text message which is consistent with 2017.
- Interest in receiving general information news releases or more urgent alerts through ONWASA's website or social media sites is fairly low.

## **Knowledge About ONWASA's Services is Similar to 2017**

- One-quarter indicated that they know little about ONWASA's services – two in ten know *very little*.
- Two in ten indicated that they know a lot – five percent said they know *a great deal* about ONWASA's offering.

## **Bill Payment is Similar to 2017**

- The majority of customers pay their monthly bill online.
- Less than one in ten pay in person, and interest in doing so appears to be lukewarm, particularly at a store or bank.

# Implications

## This data implies the following

- If feasible/cost effective, ONWASA should determine what could be done to eliminate or *further* reduce chemicals or improve the taste of the water.
- Given the low interest in receiving communication from ONWASA via the website or social media sites, any communication/alerts should include other methods; primarily email and/or text.
- There appears to be an opportunity to educate customers on the services offered by ONWASA, perhaps via an email blast with a list of offerings.
  - Given that a fairly high percentage of customers have received service from ONWASA for less than five years, this information should be sent fairly often (perhaps every 2-3 years).



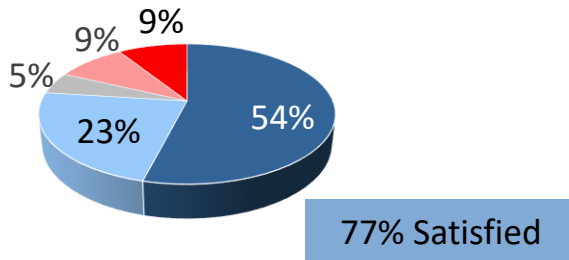
# DETAILED FINDINGS



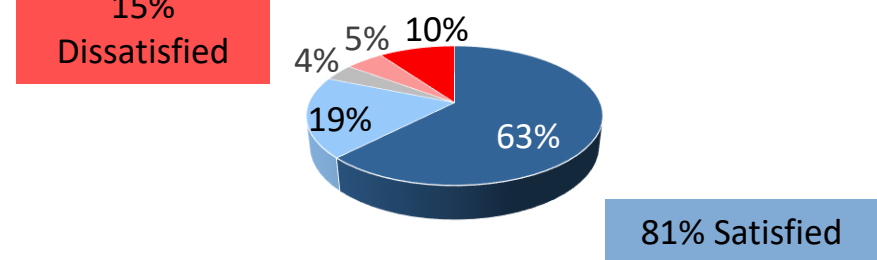
# Overall satisfaction is directionally higher than 2017

- 8 in 10 are satisfied with ONWASA.
- Those very satisfied increased from 54% in 2017 to 63%.
- Fifteen percent indicated overall dissatisfaction.

**2017**  
**Overall Satisfaction with ONWASA**



**2019**  
**Overall Satisfaction with ONWASA**



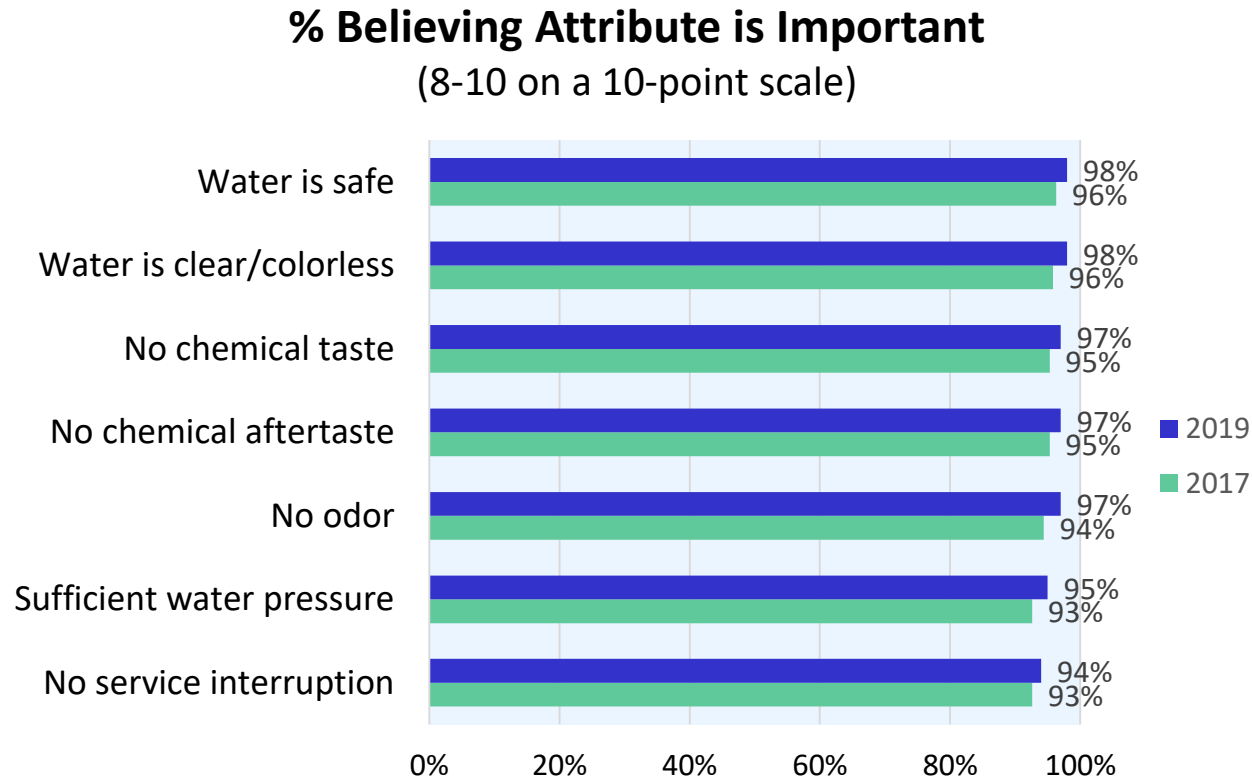
- Very Satisfied
- Somewhat Satisfied
- Neither
- Somewhat Dissatisfied
- Very Dissatisfied

- Very Satisfied
- Somewhat Satisfied
- Neither
- Somewhat Dissatisfied
- Very Dissatisfied



# Importance of attributes is similar to 2017

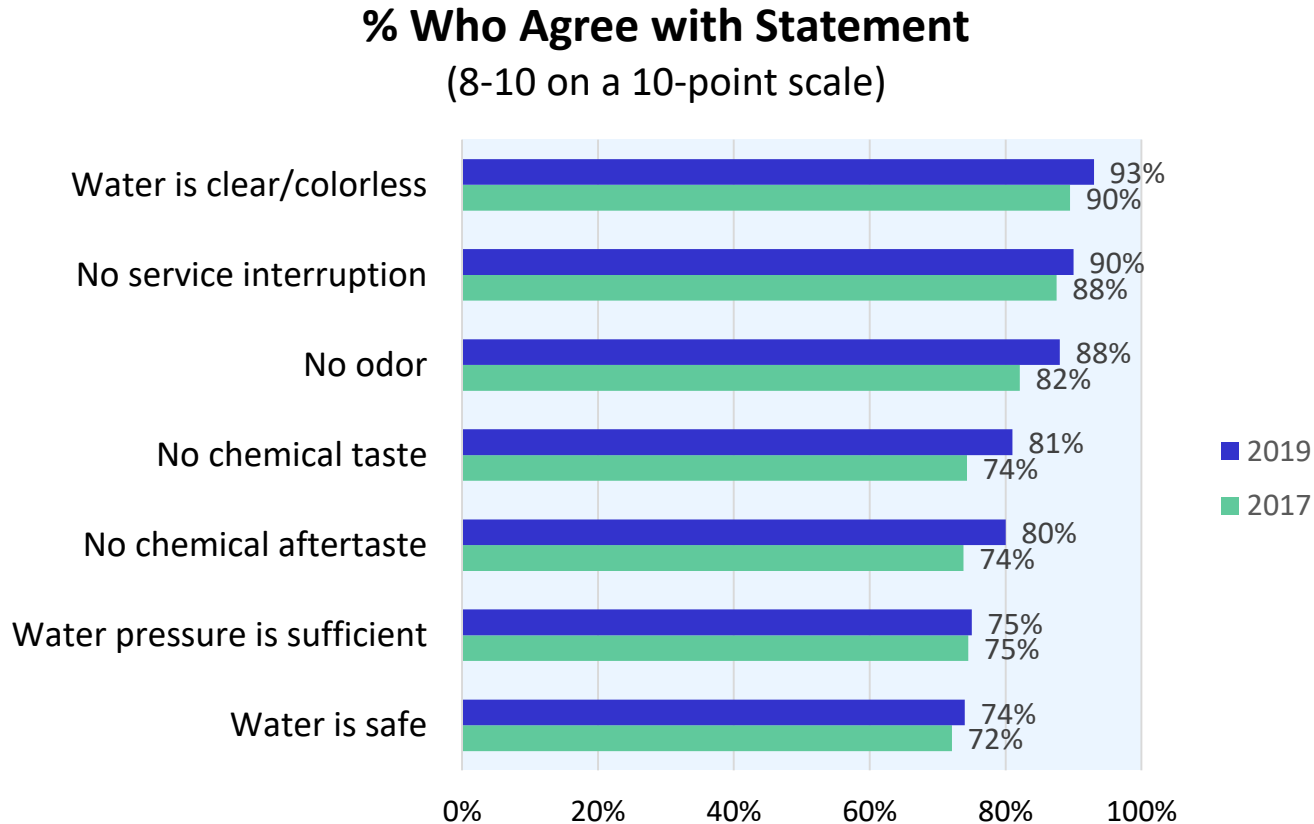
- *Water safety and clearness* are most important to customers, followed closely by the *absence of a chemical taste/aftertaste and/or odor*.
- Although highly important, *no service interruption and sufficient water pressure* are considered *somewhat* less important among the attributes included.



Q.1 Please rate the importance of the attributes below regarding your/your company's water system.  
(1 = "Not at all important;" 10 = "Very important")

# ONWASA performance is slightly higher compared to 2017

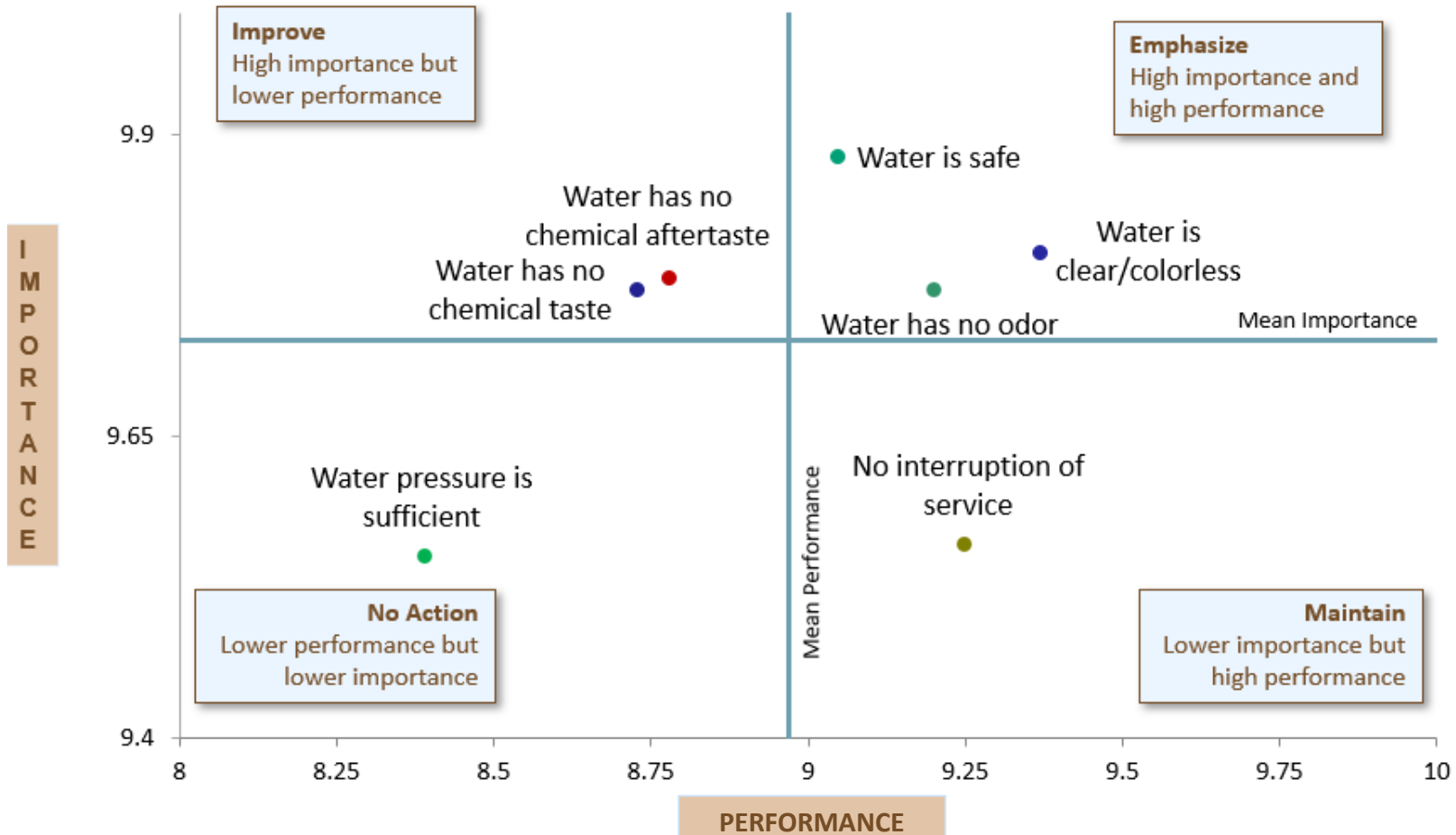
- Similar to 2017, 14% indicated they do not know if the water is safe or not.



Q.2 Please rate your level of agreement with each statement below regarding the ONWASA water system.  
(1 = "Do not agree at all;" 10 = "Agree completely")

# ONWASA's strengths are safety, clearness, & no odor

- Areas of *subtle improvement*\* would include further work to eliminate the chemical taste and aftertaste of the water.



\*Note that the axis lines on this perceptual map focus the reader's attention on the extreme upper right portion of a 10-point scale. "Importance" is calibrated to the top 6/10ths of a point while "performance" reflects 2 of 10 points.

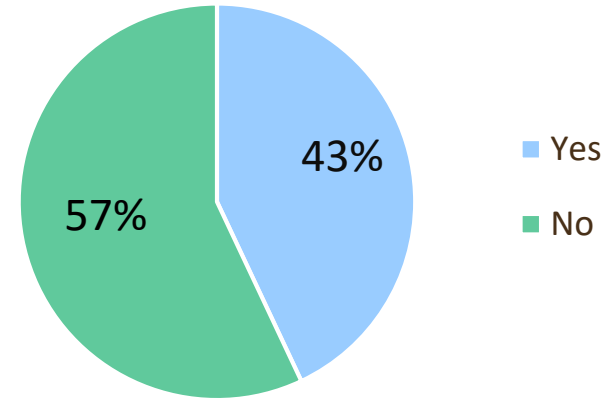
Q.1/Q.2 Importance/Performance



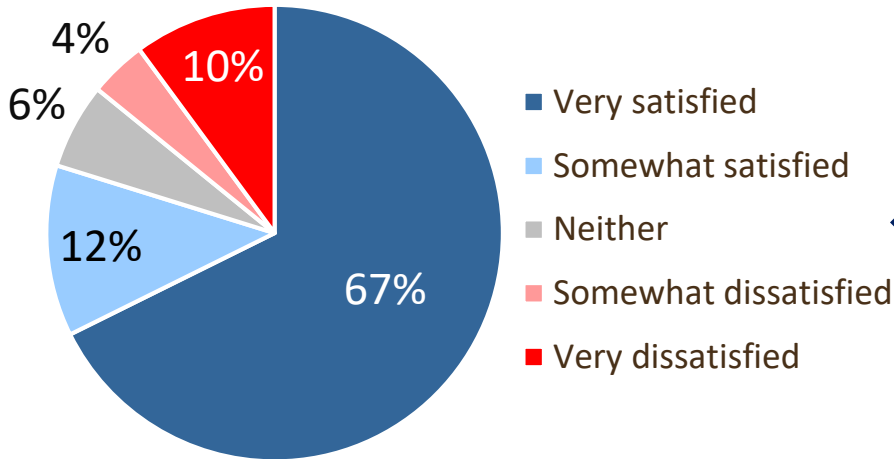
# Overall satisfaction with employees is fairly high

- Four in ten have interacted with ONWASA employees in the past year. This percentage is slightly lower than 2017 when 48% indicated interaction with employees.

Interacted with ONWASA Employees in Past Year



Overall Satisfaction with ONWASA Employees (Base: 318)



- Eight in ten of those who have interacted with ONWASA employees in the past year are satisfied with employees. This compares to 74% satisfied from the 2017 study.

## Agreement with ONWASA employee statements improved from 2017

- *Clear speech, professionalism, and politeness* again are key strengths of ONWASA employees.
- Just two percent or fewer respondents disagreed with any of the statements.

### Agree with Statements Regarding ONWASA Employees

| Base: Interacted with employees in past year             | 2017 (n=196) |                    | 2019 (n=318) |                    |
|--|--------------|--------------------|--------------|--------------------|
|  | Agree (8-10) | Do Not Agree (1-3) | Agree (8-10) | Do Not Agree (1-3) |
| Speak clearly/understandably                             | 86%          | 5%                 | 91%          | <1%                |
| Are polite/courteous                                     | 84%          | 8%                 | 90%          | <1%                |
| Are professional   | 84%          | 7%                 | 89%          | 1%                 |
| Are knowledgeable about my questions/problems            | 81%          | 8%                 | 85%          | 2%                 |
| Listen to me explain my questions/problems               | 81%          | 5%                 | 84%          | 1%                 |
| Are able to resolve my questions/problems satisfactorily | 76%          | 10%                | 81%          | 2%                 |

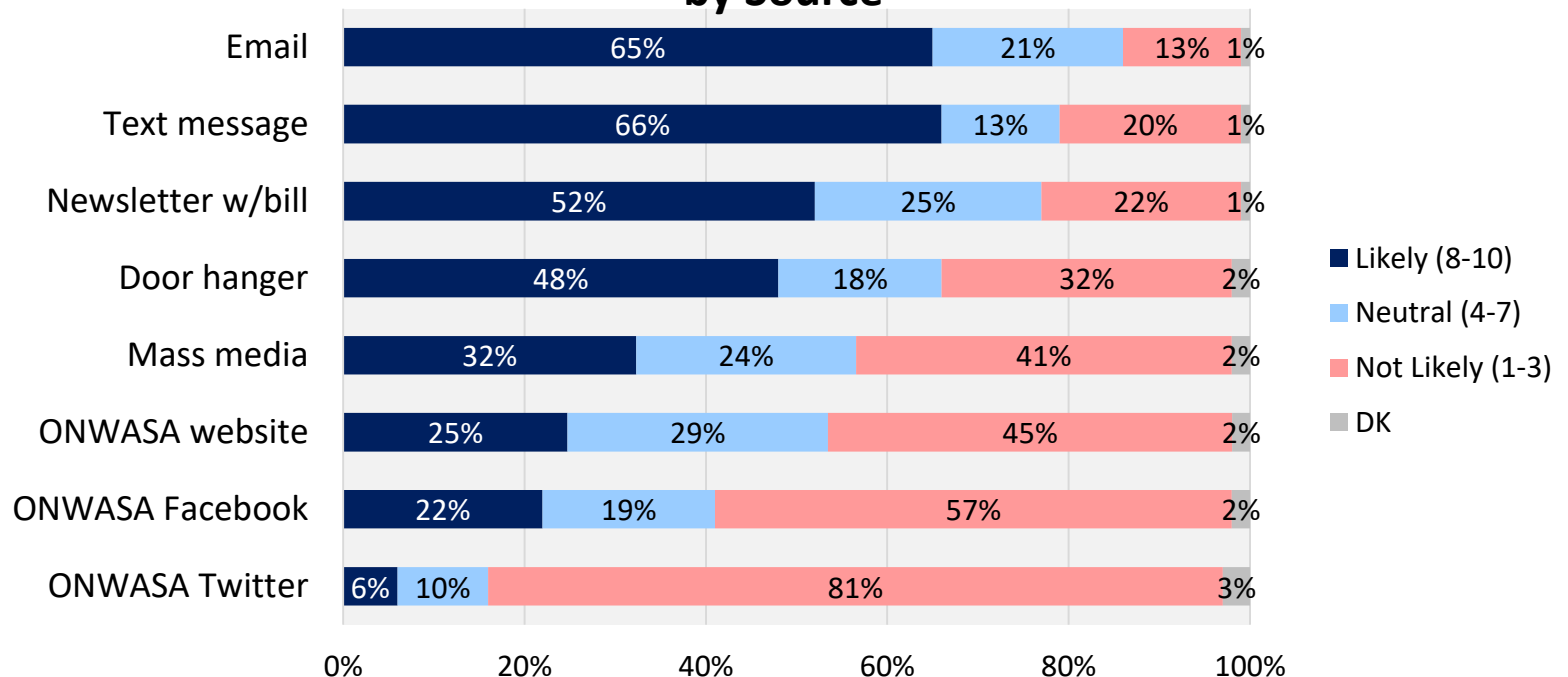


Q.12 Please indicate how much you disagree or agree with each statement below regarding ONWASA employees.  
(1 = "Do not agree at all;" 10 = "Agree completely")

# General news via email or text would be most read

- Two-thirds of respondents would read a general information news release in either of these formats a slight increase from the 6 in 10 observed for the 2017 survey.
- Customers would be least likely to refer to ONWASA's website and/or social media sites to obtain this information (among sources listed).

**2019 Likelihood to Read General Information News by Source**



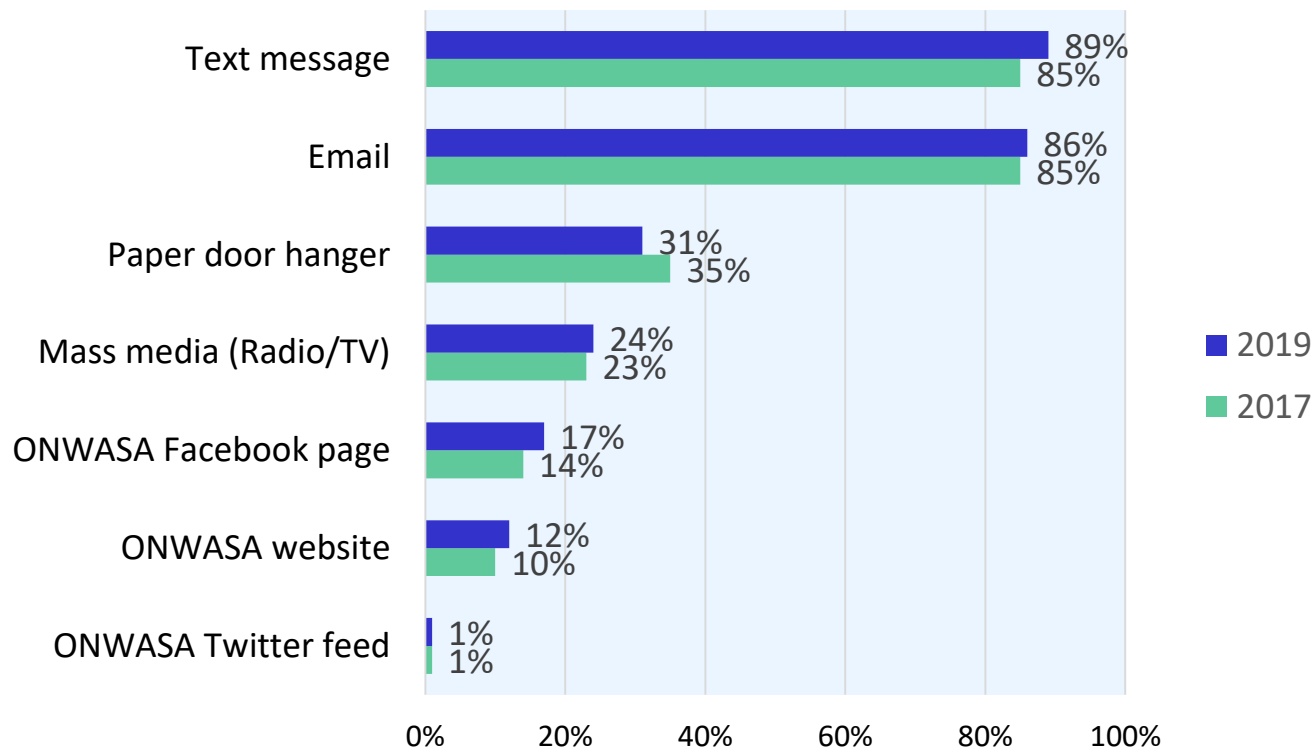
Q.4 How likely would you be to read a GENERAL INFORMATION news release from ONWASA if it appeared in each of the following forms?



# Texts and emails are still preferred for urgent messages

- Three-quarters would like to receive urgent messages via *both* channels, text and email (not shown). Again, this is consistent with findings from 2017.
- Additionally, about a third would like to receive urgent notifications via a paper door hanger.

## Communication Preferences for Urgent Messages

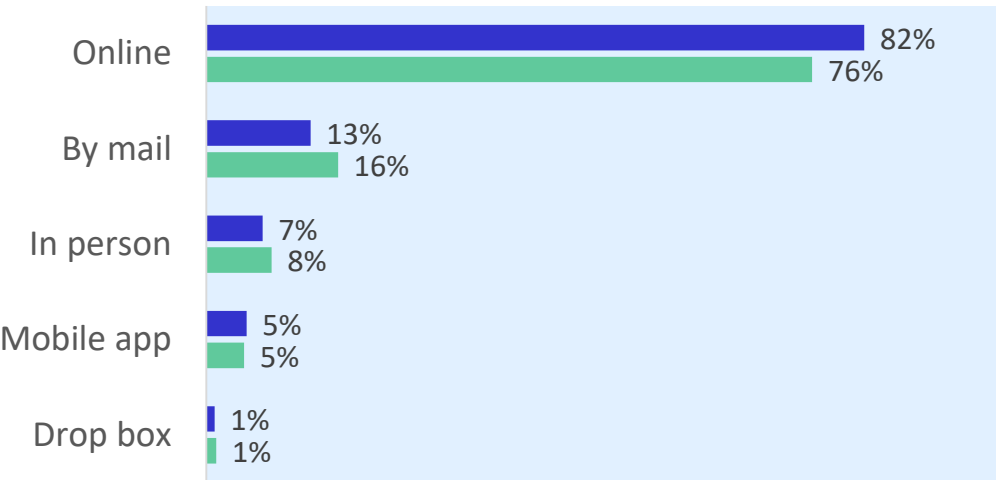


# 8 in 10 pay their water bill online

- And payments methods are similar to 2017 results.
- Paying via outdoor drop box or by mobile app are least popular.
- Among the 48 respondents who pay their bills in person, 21 do so at a nearby town hall, and 28 pay at ONWASA's office. [Not shown]
- There is little interest in paying ONWASA bills at local stores or banks.

## Bill Payment Method

■ 2019 ■ 2017



## Q8. In-Person Payment Preferences

| Base: (People who don't pay in person) | 2017 (375) | 2019 (688) |
|--|------------|------------|
| ONWASA's office                        | 18%        | 19%        |
| Nearby town hall                       | 12%        | 8%         |
| Local grocery store                    | 7%         | 8%         |
| Local retail store                     | 6%         | 7%         |
| Local bank                             | 4%         | 4%         |
| Don't know/Prefer not to pay in person | <b>59%</b> | <b>59%</b> |



Q.6 How do you typically pay your/your company's monthly bill?

Q.7 At which of the following do you typically pay your/your company's bill?

Q.8 If you were to pay your/your company's bill in person where would you prefer to go?

# 2 in 10 know very little about ONWASA's offerings

- One-quarter indicated a little knowledge about ONWASA's services, and two in ten said they know a lot.
- So overall those polled in 2019 claimed about the same knowledge about ONWASA's services as those surveyed in 2017.

| <b>Knowledge About ONWASA's Services</b> |             |             |
|--|-------------|-------------|
|  | <b>2017</b> | <b>2019</b> |
| <b>A Little (1-3)</b>                    | <b>29%</b>  | <b>25%</b>  |
| Very Little (1)                          | 19%         | 16%         |
| <b>Neutral (4-7)</b>                     | <b>54%</b>  | <b>54%</b>  |
| A great deal (10)                        | 7%          | 5%          |
| <b>A Lot (8-10)</b>                      | <b>17%</b>  | <b>21%</b>  |
| Mean                                     | 5.0         | 5.3         |

# Improving existing systems is most important

- Consistent with 2017, half of customers polled believe that improving the existing systems for customers is most important, and three in ten feel that maintaining these systems is most important.
- As may be expected, expanding the water system into new service areas is deemed least important.
- Five customers also mentioned lower bills or fees. [Not shown]

## Preferred Area of Focus Over Next Five Years

|   | 2017 | 2019 |
|---|------|------|
| <u>Improving</u> the existing water and sewer system for existing customers   | 47%  | 51%  |
| <u>Maintaining</u> the existing water and sewer system for existing customers | 36%  | 30%  |
| Expanding the <u>sewer</u> system into new service areas                      | 10%  | 13%  |
| Expanding the <u>water</u> system into new service areas                      | 4%   | 4%   |
| Something else  | 3%   | 2%   |



# **SAMPLE COMPOSITION**

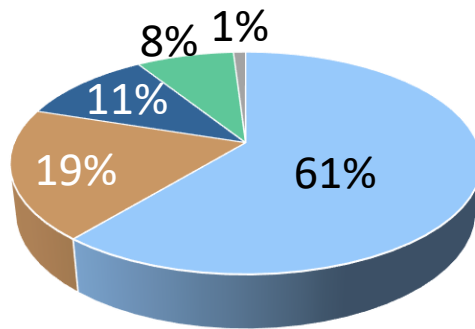


# 2019 respondents have been customers longer

- One third of respondents for the current wave have been customers for 10 or more years compared to two in ten from the 2017 wave.
- Additionally, six in ten from the 2017 wave had been customers for less than five years compared to five in ten for the current wave.

**2017**

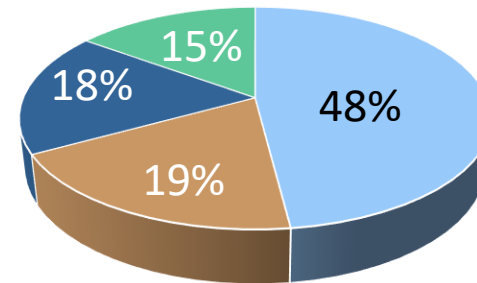
**Length of Time Customer of ONWASA (in Years)**



■ <5 ■ 5-<10 ■ 10-<20 ■ 20+ ■ Not sure

**2019**

**Length of Time Customer of ONWASA (in Years)**

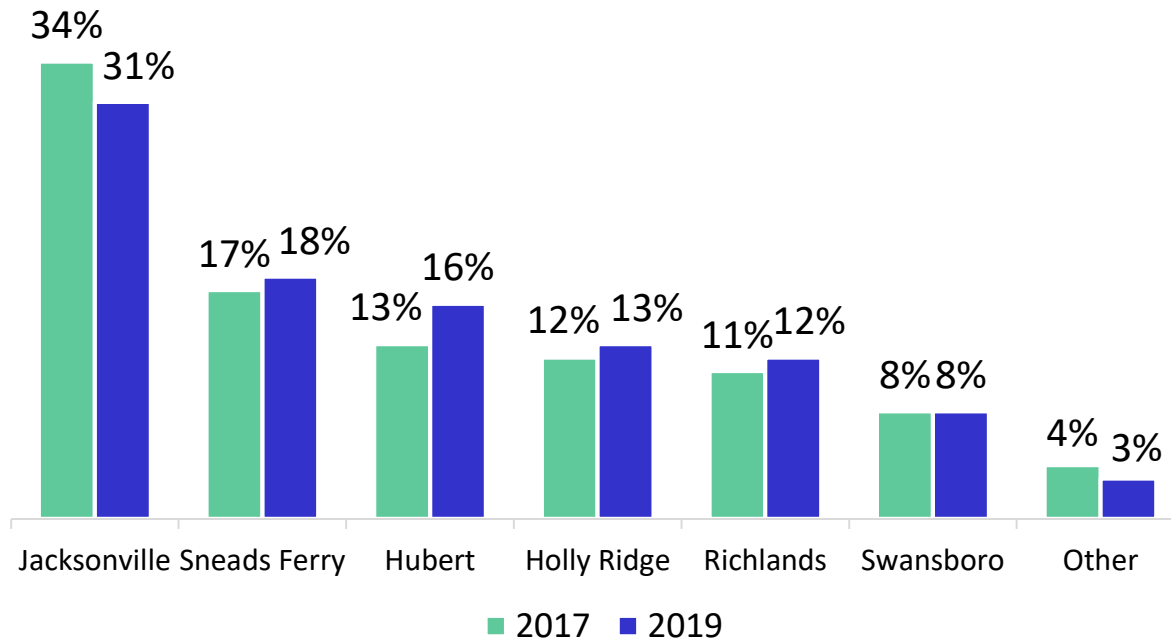


■ <5 ■ 5-<10 ■ 10-<20 ■ 20+ ■ Not sure

# About a third reside in Jacksonville

- Responses by city were very similar to 2017.

## City of Residence



# APPENDIX





# Perceptual Map

Perceptual mapping is a graphics technique used by marketers that attempts to visually display the perceptions of customers. In the perceptual map on Slide 13, the importance of each attribute is shown in relation to actual performance with ONWASA for each attribute. Results may be read as follows:

- High importance/High performance: “Strengths” – areas that are important to customers and in which ONWASA is doing well
- Low importance/High performance: “Less critical” – areas in which ONWASA is “overcompensating”
- High importance/Low performance: “Primary weaknesses” – attributes that need the greatest level of attention
- Low importance/Low performance: “Secondary weaknesses” – lower performance ratings but lower in importance as well

The four quadrants are divided by lines that indicate mean importance and mean performance for all attributes in total. **It is important to realize that the graphing explodes/illustrates a small portion of the total scale for each axis in this case.**