

Alameda County Water District Customer Survey

Key Findings of a Survey Conducted Among ACWD Customers

*Survey Conducted:
November 12-21, 2017*

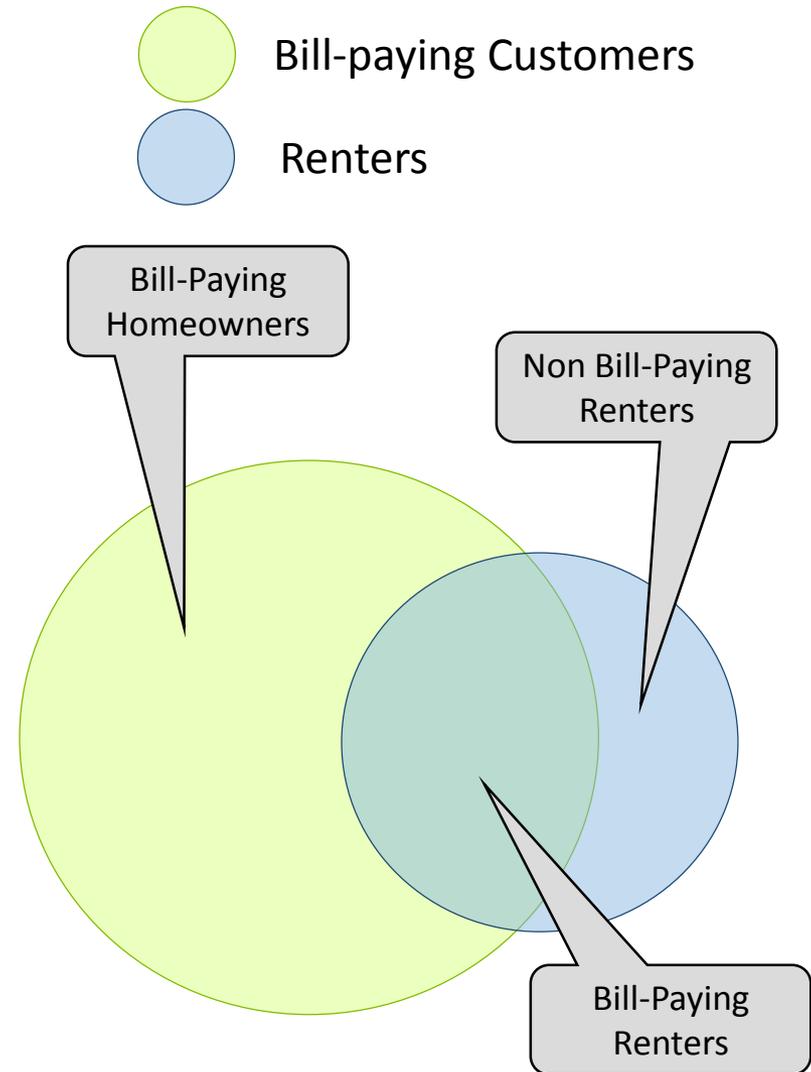
DRAFT

Fairbank, Maslin, Maullin, Metz & Associates – FM3

PUBLIC OPINION RESEARCH & STRATEGY

Sample Approach

- We wanted to include interviews with bill-paying customers and those who use ACWD services, but do not receive a water bill. Renters can fall into either category.
- Bill-paying customers were identified from a datafile provided by ACWD, including information about their service.
- Non-bill-paying customers were identified from a list of registered voters as likely being renters, and were asked screening questions during their interviews to ensure they do not pay a water bill.



Methodology

- 484 interviews with ACWD customers, drawn from bill-paying customer lists (400) and voter rolls (84)
- Conducted November 12-21, 2017, via landline and cell phones in English, Spanish and Mandarin
- Due to rounding, some percentages do not add up to 100%
- This approach differed from the 2011 survey that employed a random-digit dialing methodology



Margins of Sampling Error for Selected Subgroups

	N Size	±MOE
All Respondents/Customers	484	±4.5%
Bill-Paying Customers	400	±4.9%
Non-Bill-Paying Customers	84	±10.9%
All Renters	189	±7.3%
Fremont Residents	326	±5.5%
Newark Residents	67	±12.2%
Union City Residents	90	±10.5%

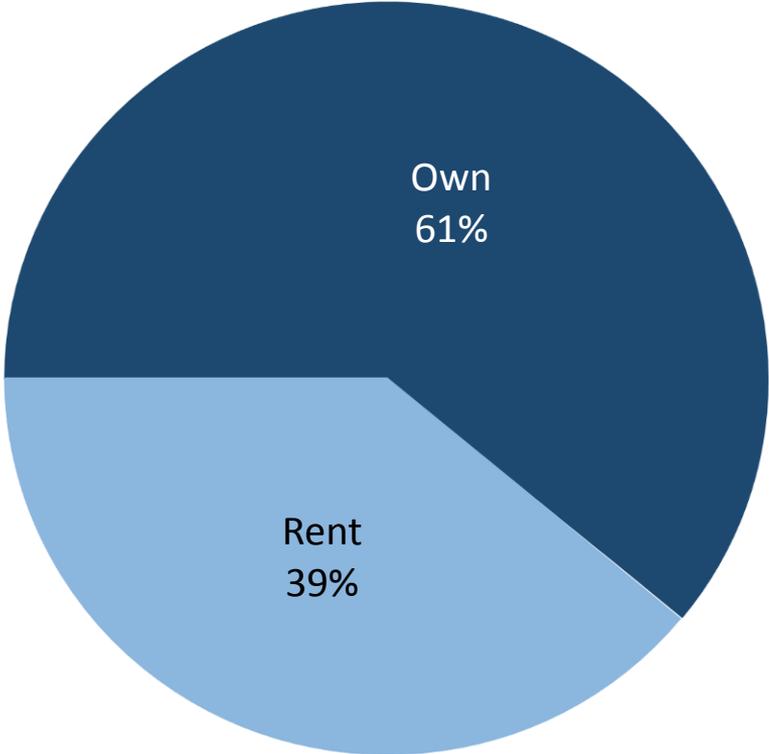
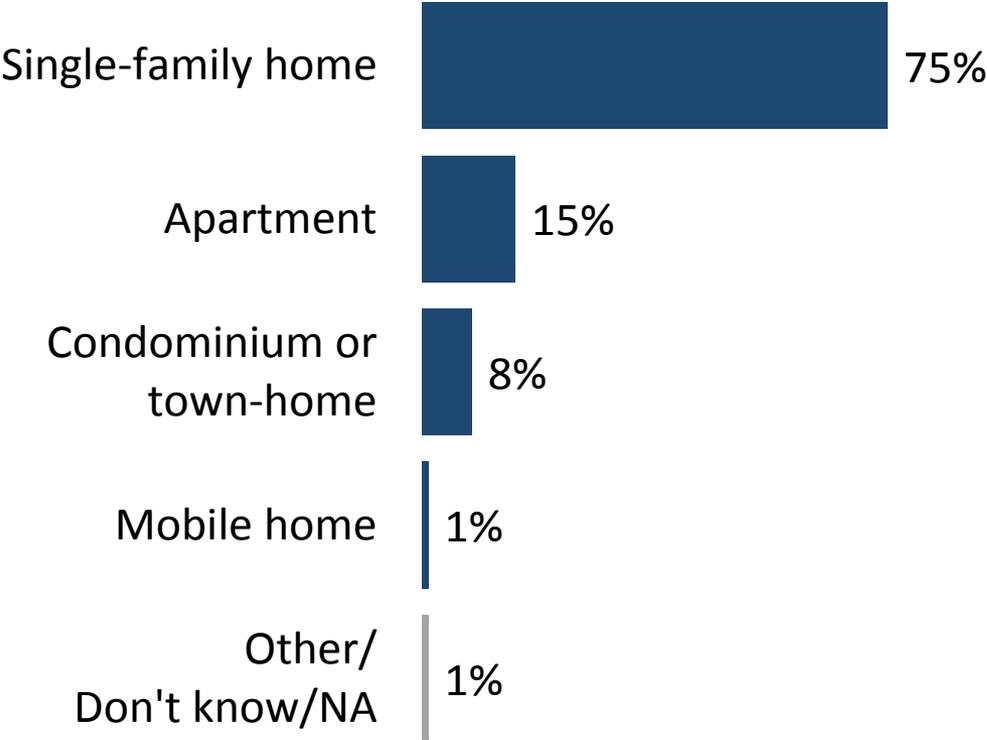
*Unless otherwise noted,
results will be for all customers
(i.e., all survey respondents)
throughout the survey.*



Who Are Your Customers?

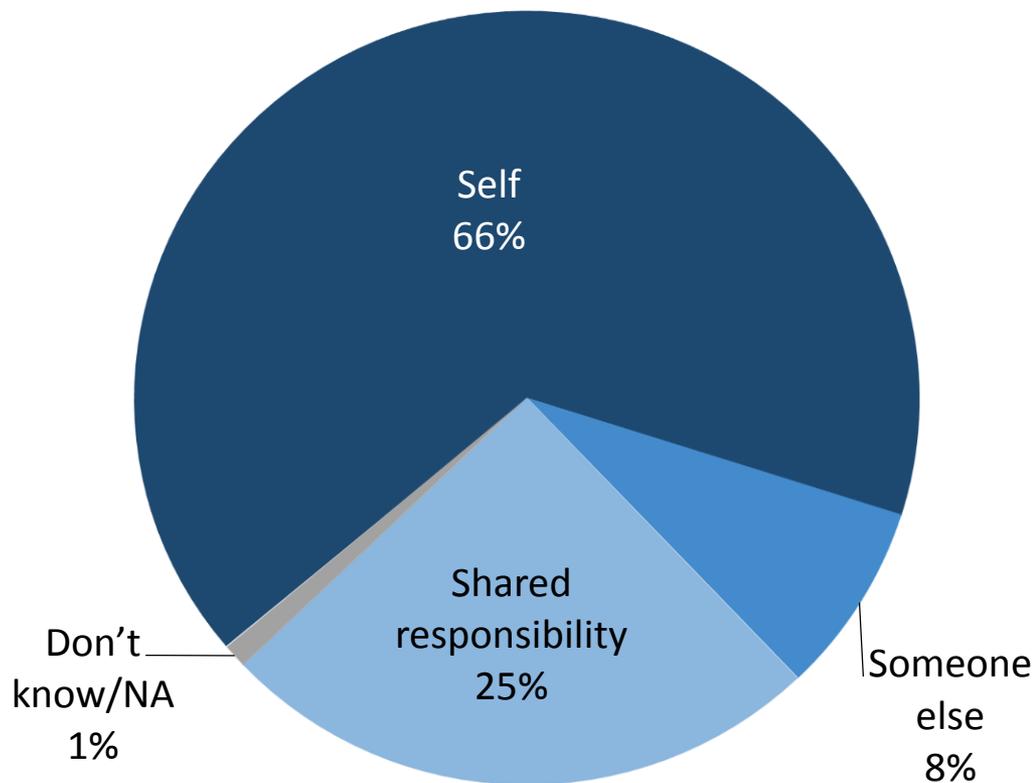
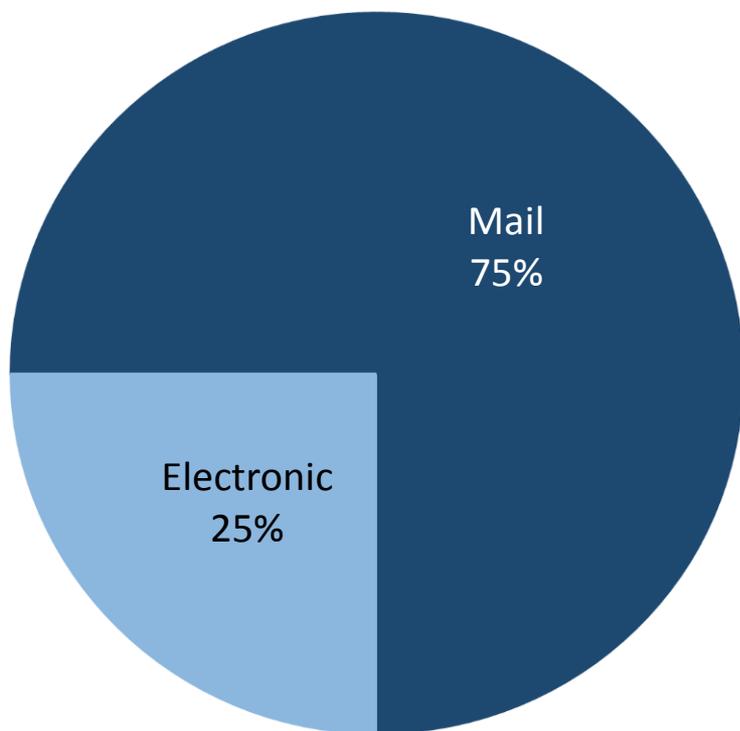
Most customers live in a single-family home; three in five are homeowners.

All Respondents, N=484



Most bill-paying customers receive mail bills and at least share bill paying responsibility.

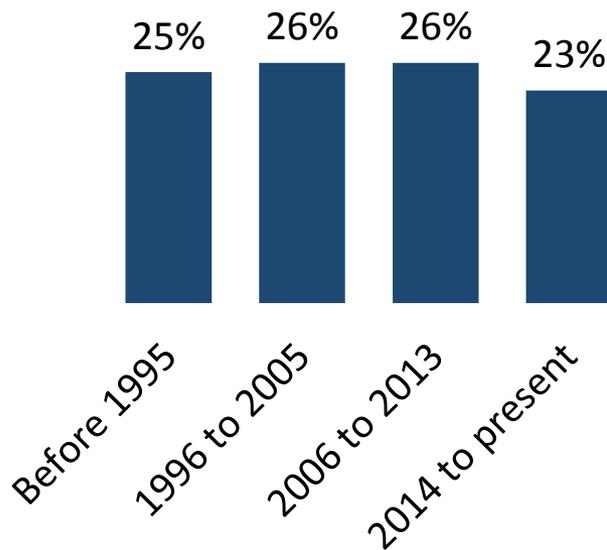
Bill-Paying Customers Only, N=400



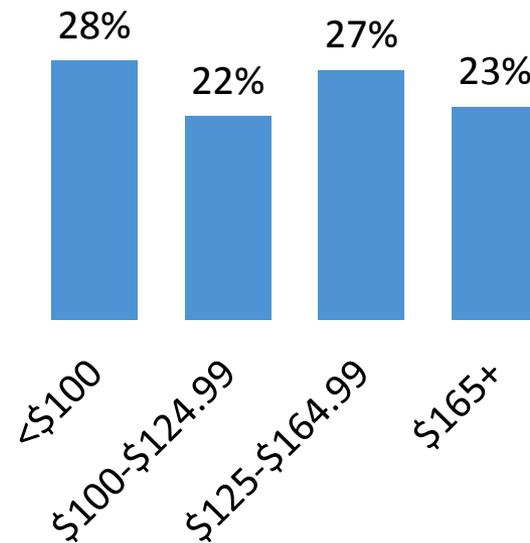
Other Bill-paying Customer Characteristics

Bill-Paying Customers Only, N=400

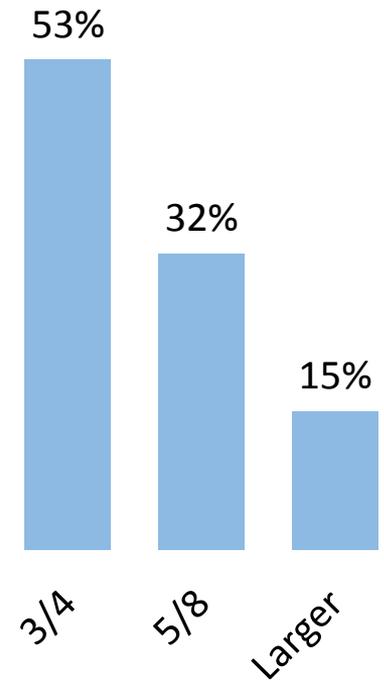
Account Established

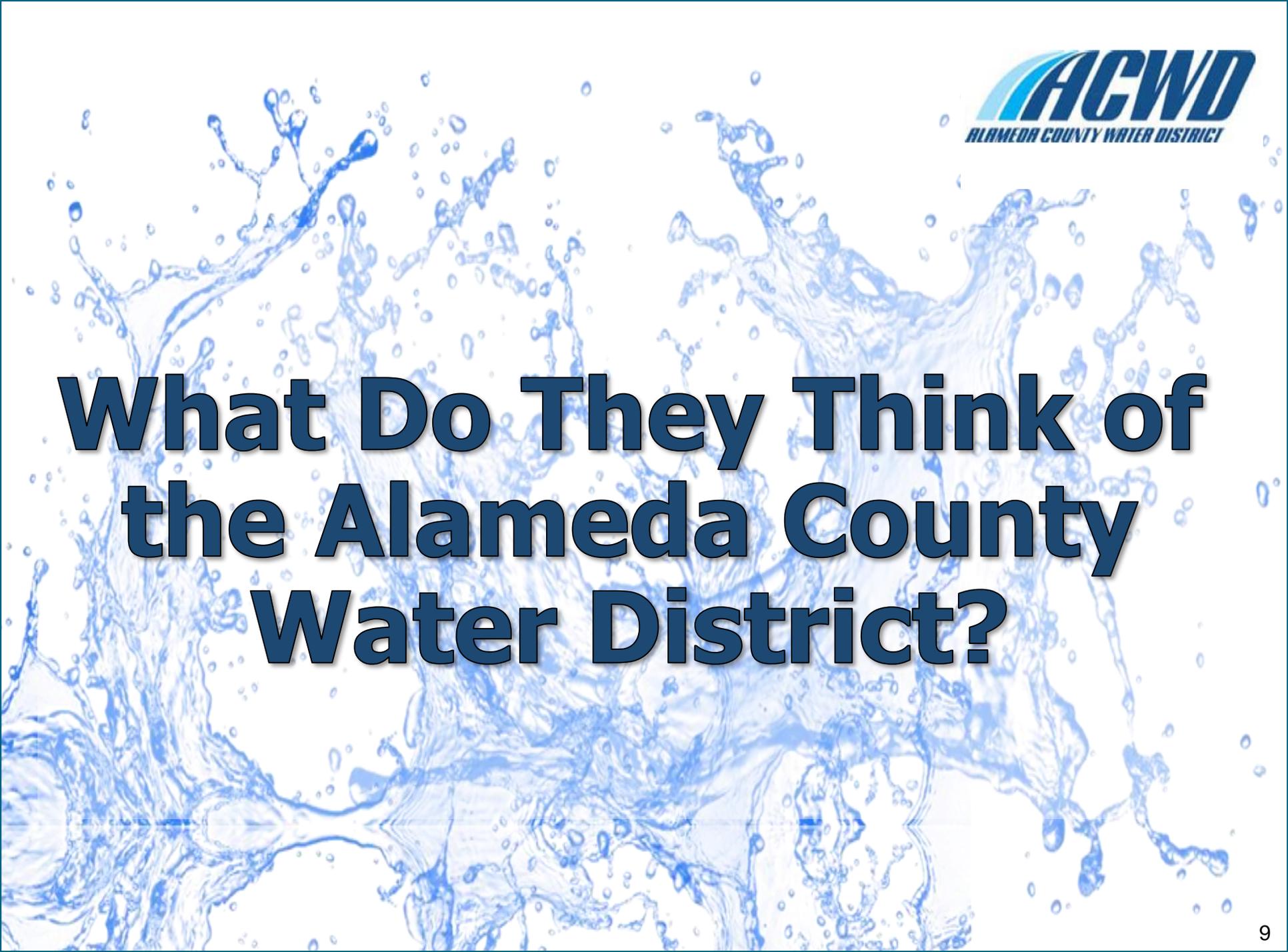


Current Charge



Meter Size



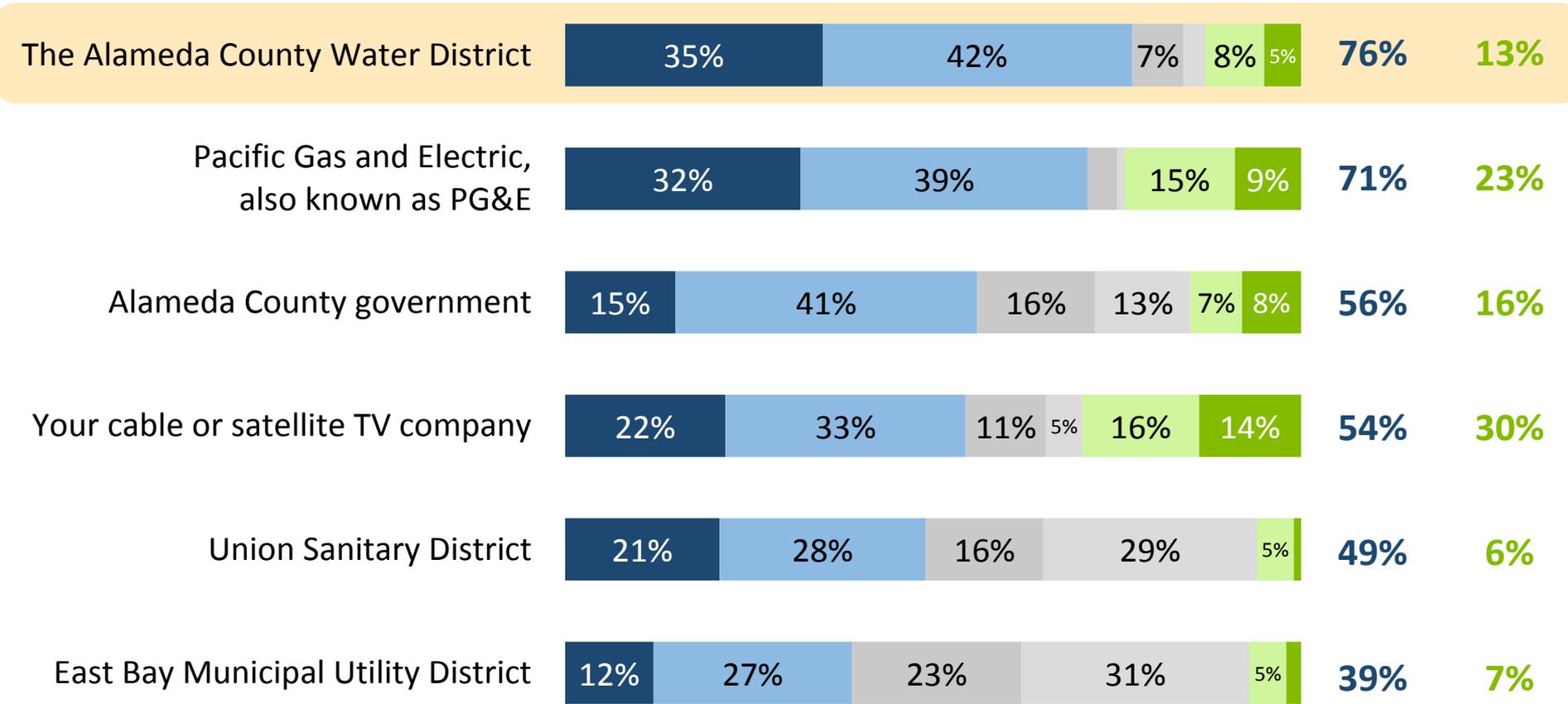


**What Do They Think of
the Alameda County
Water District?**

Three-quarters of customers hold a favorable view of ACWD.

■ Very Fav.
 ■ Smwt. Fav.
 ■ HO/CR
 ■ NHO
 ■ Smwt. Unfav.
 ■ Very Unfav.

Total Fav. **Total Unfav.**



Testing Name Identification

- ✓ In 2011, 70% of customers correctly identified their water provider as the Alameda County Water District when they were provided a list.

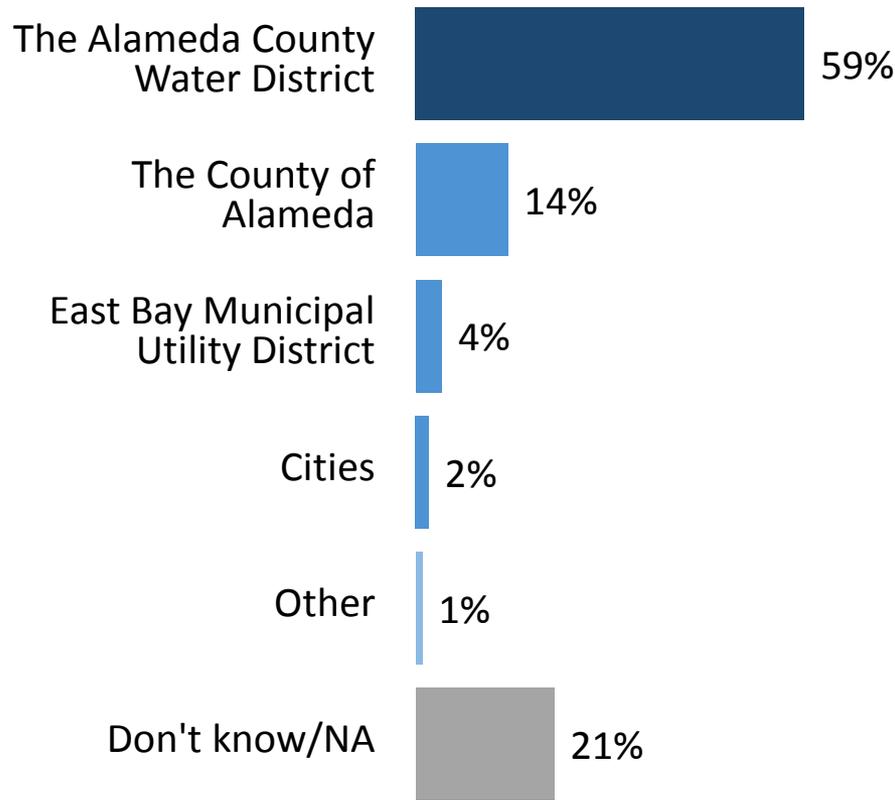


- ✓ This time, we asked the question in two different ways:
 1. Half the sample were provided that same list and asked which one provided their water (i.e., “aided”).
 2. The other half were asked in an open-ended question to identify their water provider without a list (i.e., “unaided”).
- ✓ The results are on the next slide ...

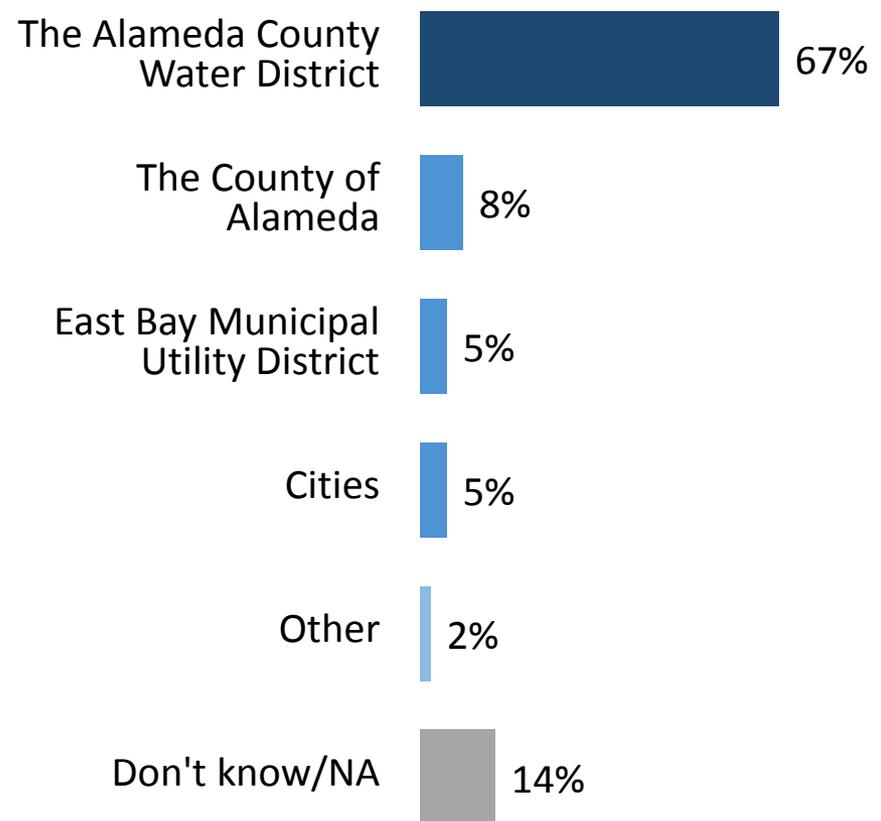
Two-thirds identified ACWD from a list, and three in five named it without a hint.

Who provides water services for your home?

Open-Ended (Unaided)



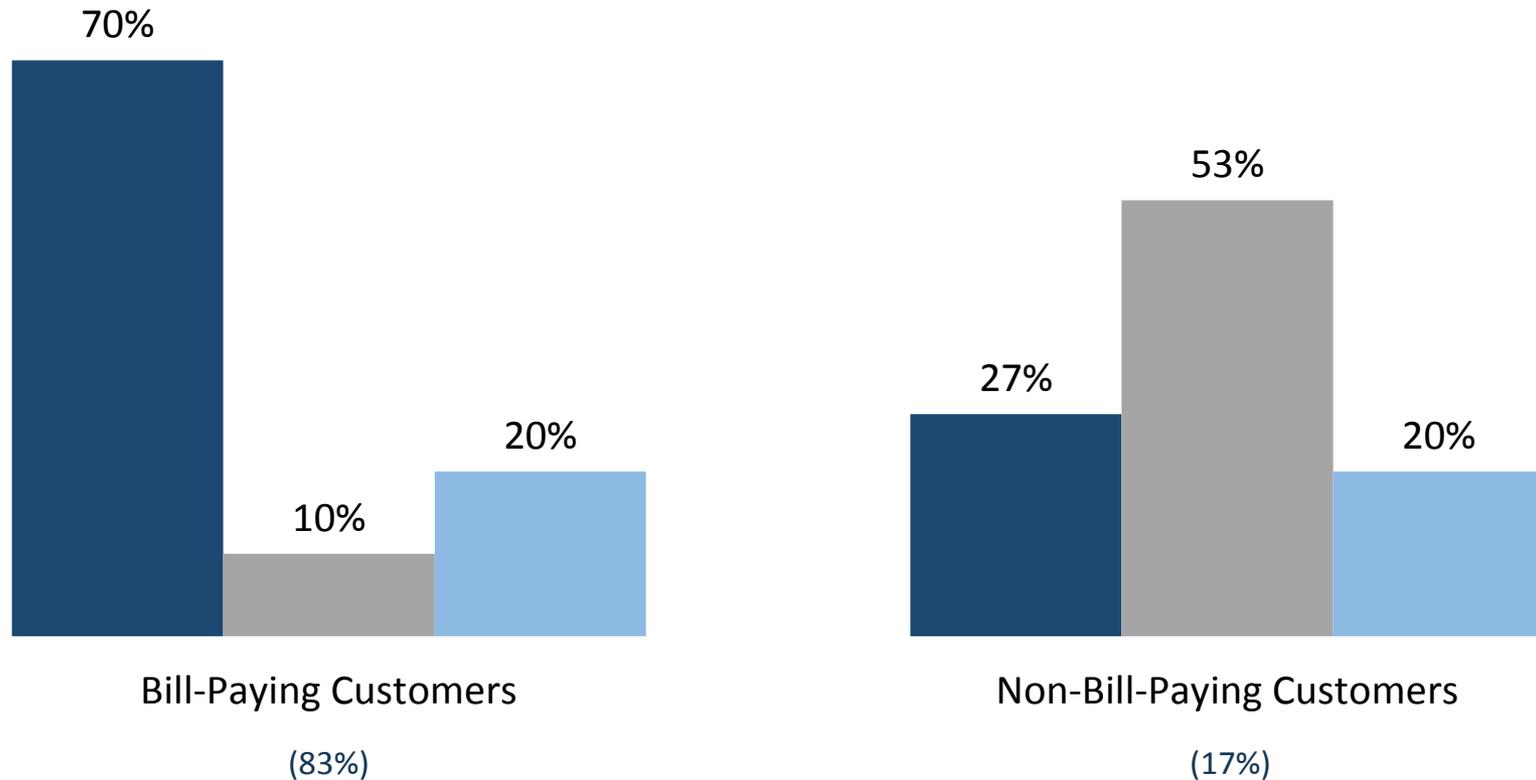
Offered a List (Aided)



As may be expected, those who receive and pay a bill for their water were much more likely to correctly identify ACWD.

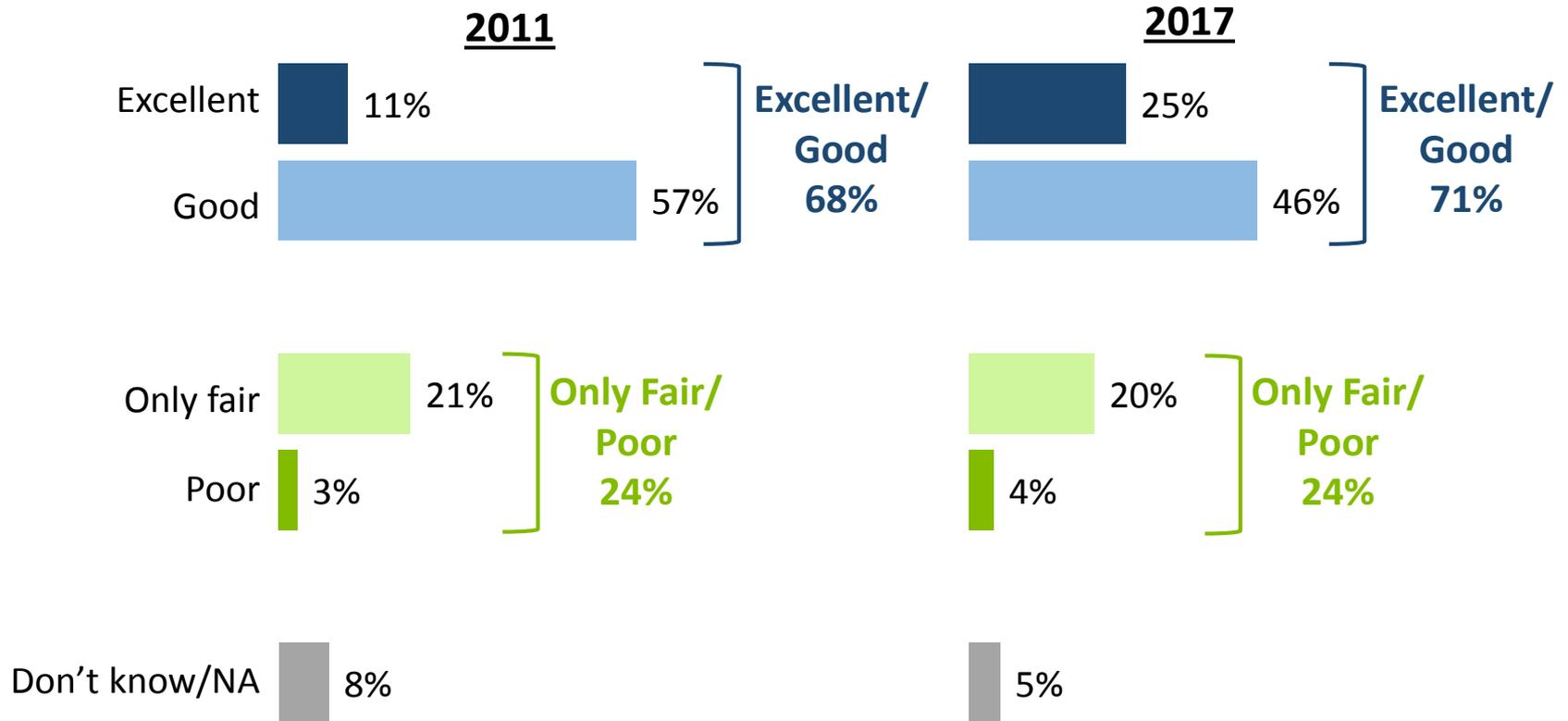
By Customers

■ ACWD ■ Don't Know/NA ■ Other



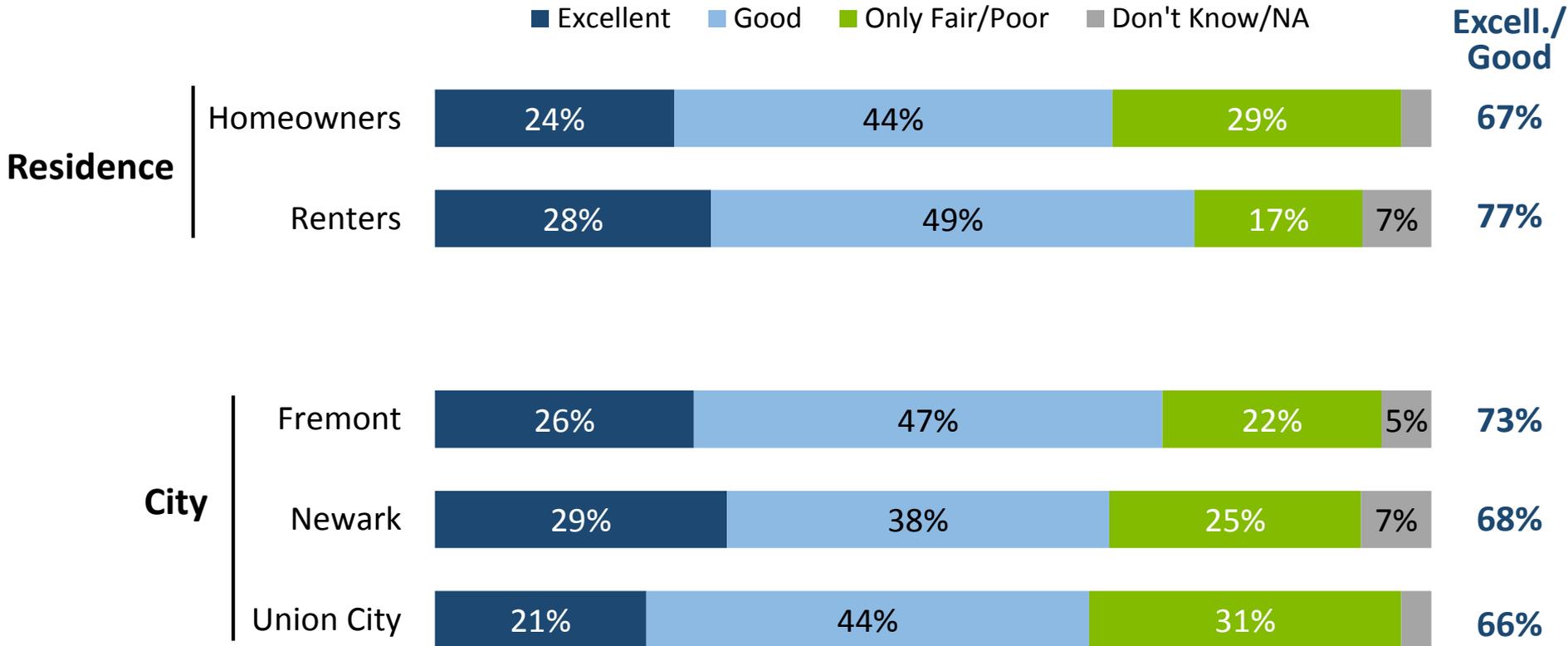
Seven in ten gave ACWD high marks, with a marked improvement in the share rating the District “excellent.”

How would you rate the job the Alameda County Water District is doing?



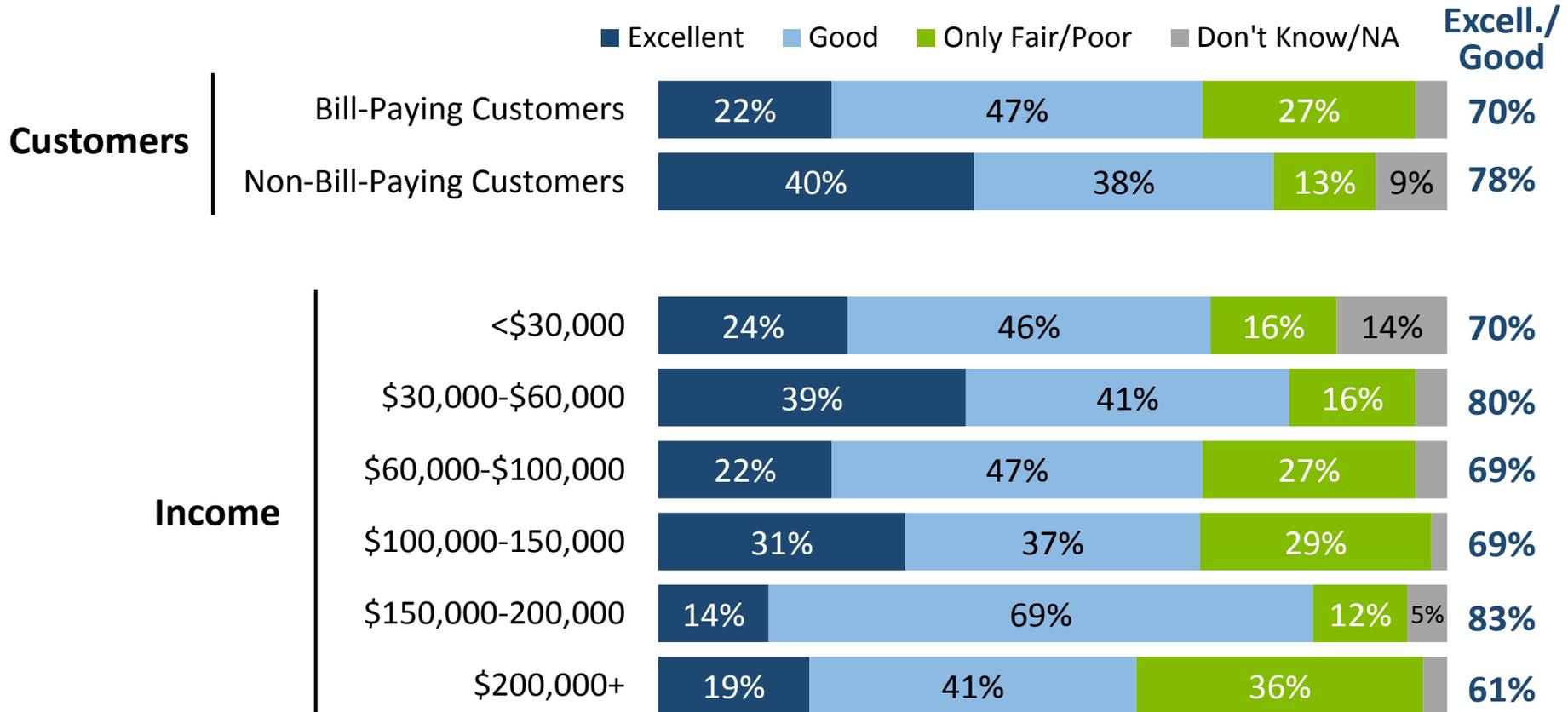
Homeowners are a bit less likely to give an excellent or good rating than renters.

By Residence and City



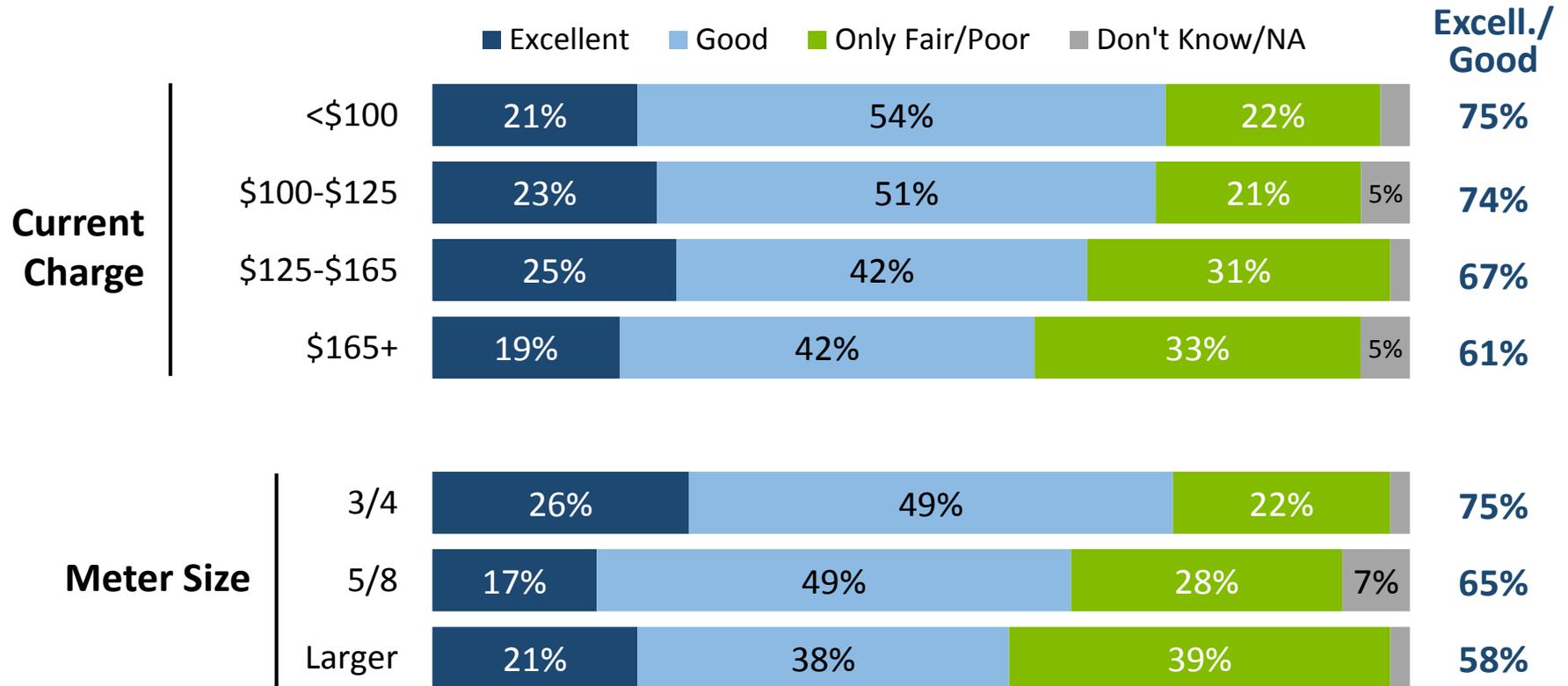
Those who don't receive and pay a bill are more likely to rate ACWD as "excellent."

By Customers and Household Income



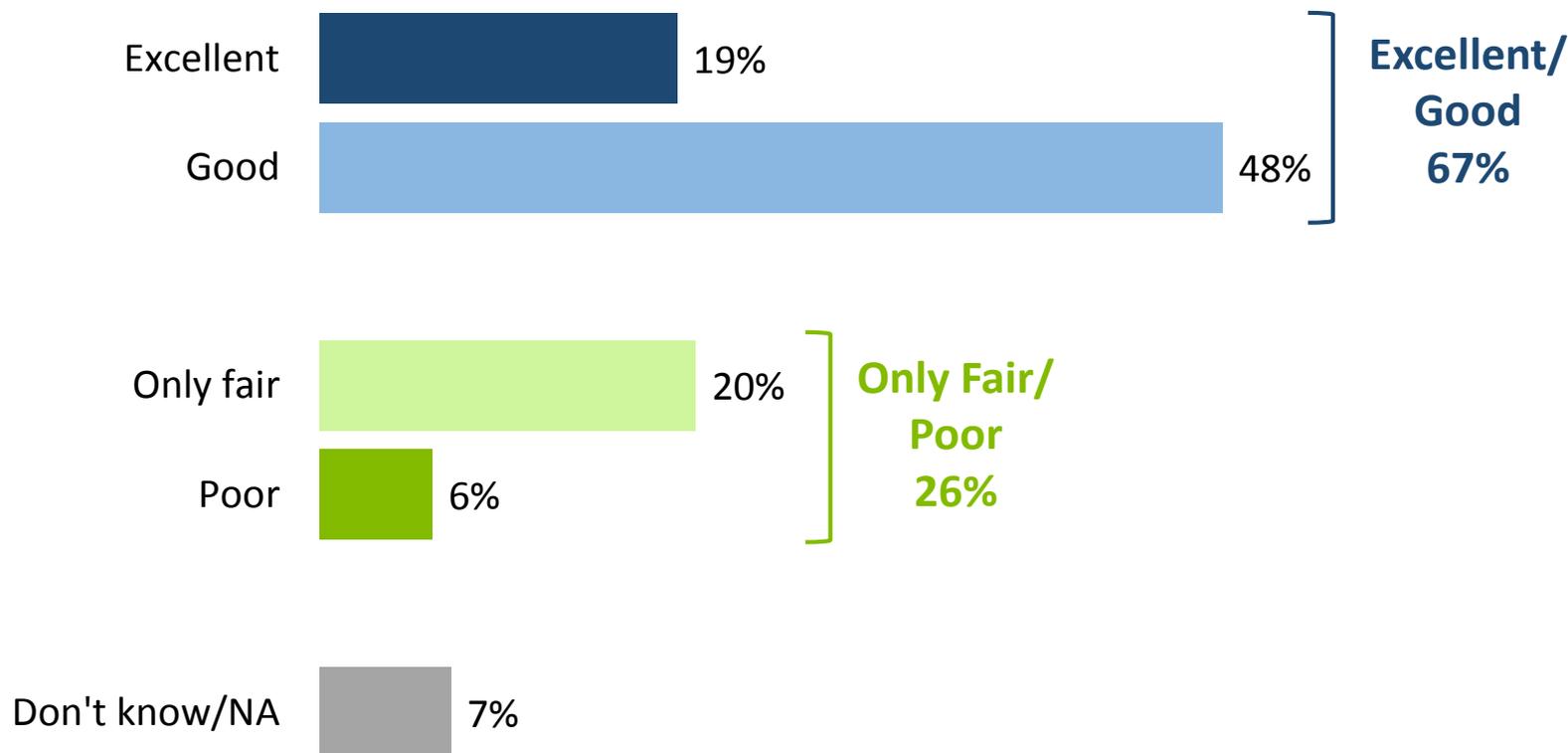
Three-quarters of those with bills under \$125 offer good or excellent ratings.

By Current Charge and Meter Size



When it comes to the drought, two-thirds give ACWD a positive rating.

What kind of job would you say Alameda County Water District did in handling the recent drought?



Demographic Differences on Drought Rating

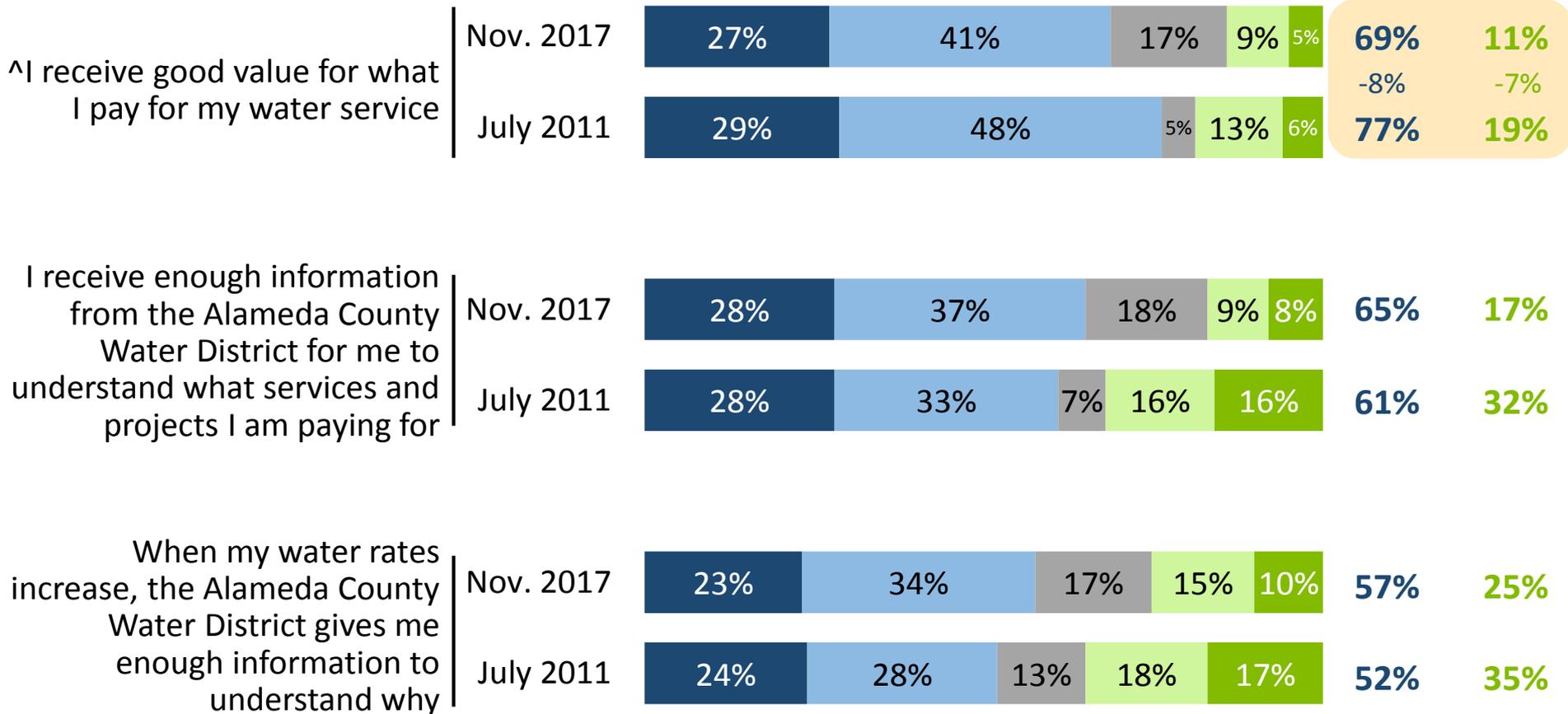
- ✓ Ratings on how ACWD handled the drought largely track customers' assessments of the job ACWD is doing overall.
- ✓ Those who could identify ACWD as their supplier by name were more likely to give a positive rating.
- ✓ Union City customers give slightly higher ratings than Fremont and Newark ones.
- ✓ Those who have the highest bills are a bit less likely to give an “excellent” or “good” rating.
- ✓ Across major demographic and socioeconomic groups such as gender, age, ethnicity and income, there are very minor differences in assessment.



How Do They Feel About Water Rates?

Majorities believe they are getting good value and enough information.

■ Strng. Agr. ■ Smwt. Agr. ■ DK/NA ■ Smwt. Disagr. ■ Strng. Disagr. **Total Agr.** **Total Disagr.**

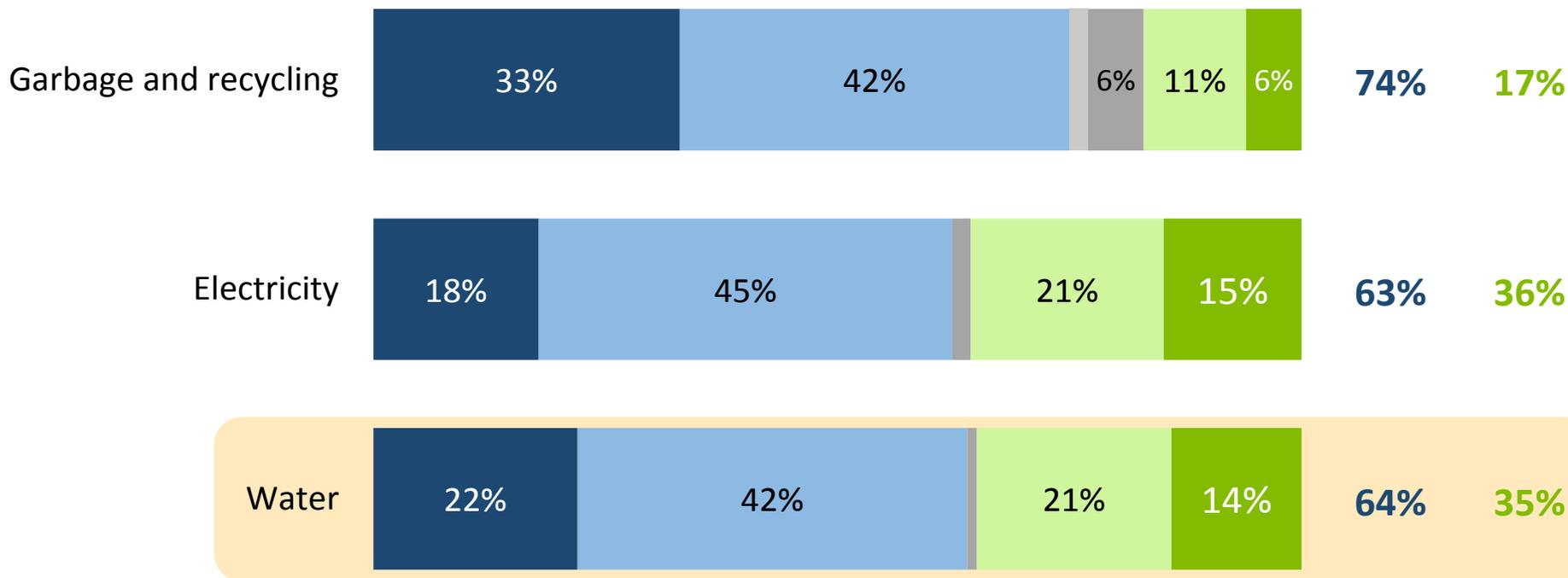


Nearly two-thirds feel their water rates are reasonable, a slight decrease from 2011.

Customer List Only

■ Very Reas. ■ Smwt. Reas. ■ Don't Use ■ DK/NA ■ Smwt. Unreas. ■ Very Unreas.

Total Reas. **Total Unreas.**



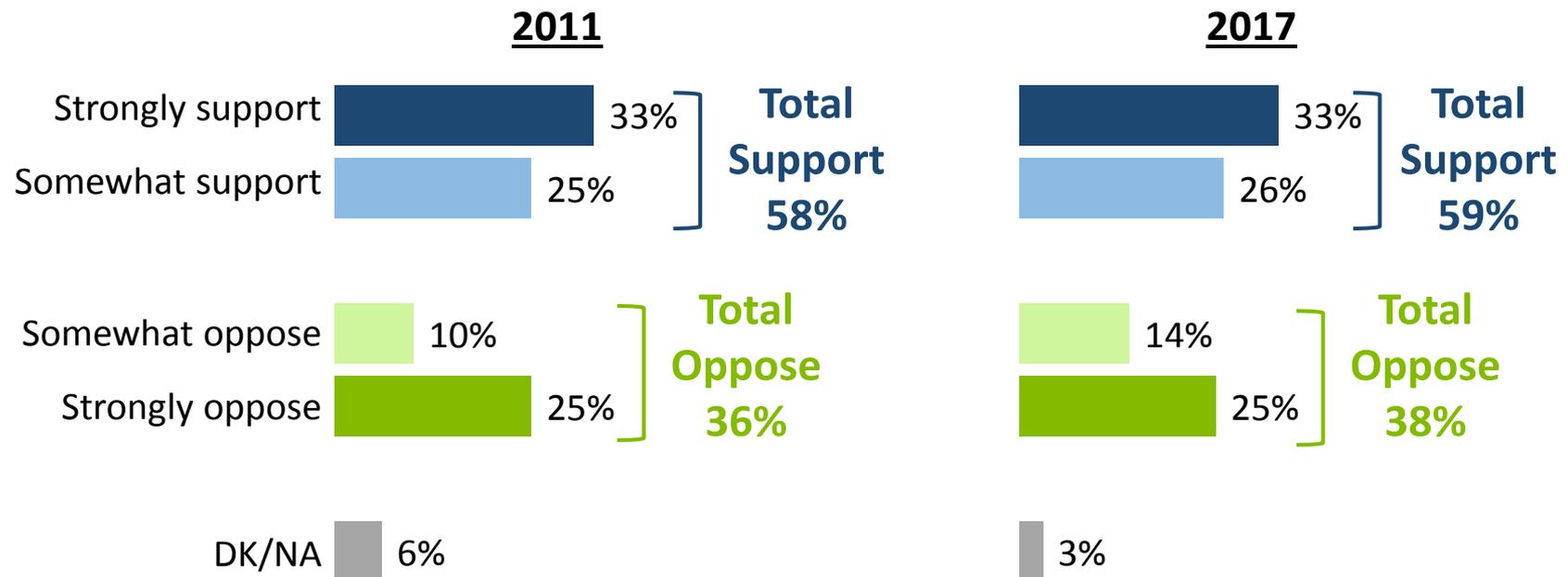
In 2011, 72% “Reasonable” and 20% “Unreasonable”

Q5 (Bill-Paying Customers). I am going to read you a list of different utilities you may use. I'd like you to tell me whether you think the price you pay for that service is reasonable or unreasonable, given the value you receive. If you do not use a specific utility, please tell me that, too.

About three in five support proportional rates for water use.

The Alameda County Water District's current rate structure for single-family homes is uniform, meaning that each customer pays the same rate per gallon of water they use.

However, the District is considering changing to a different rate structure in which customers who use more water would pay more per gallon and those who use less water would pay less per gallon. Does this type of tiered rate structure for single-family homes sound like something you would support or oppose?

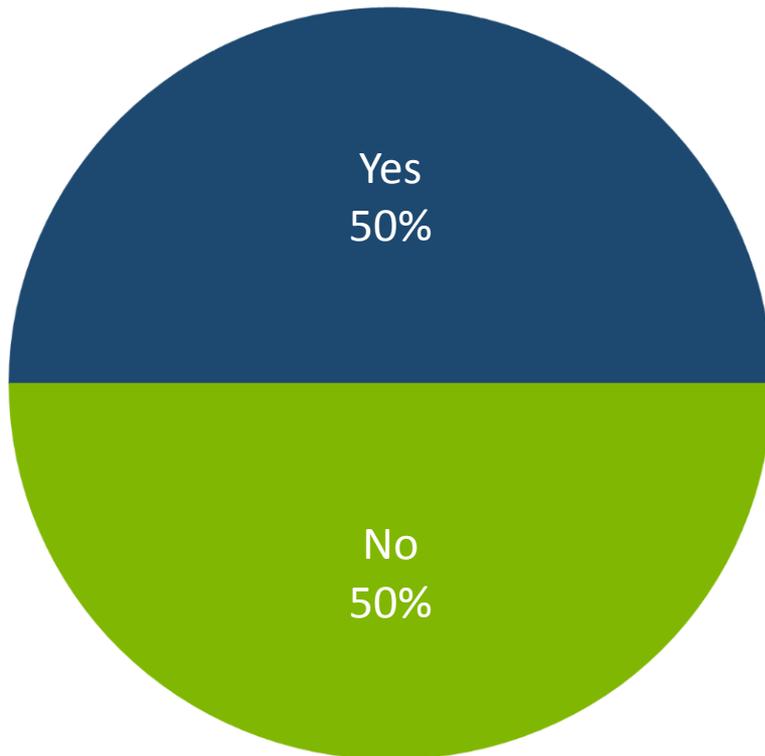




What Do They Think of Their Water Service?

Half of ACWD customers say that they filter their tap water.

Do you filter your tap water?



Groups of customers who are disproportionately likely to filter their tap water include ...

- Electronic bill payers
- Accounts established after 2006
- Men under age 50
- Asian/Pacific Islanders
- Higher-income households (\$100K+)

Most are quite happy with their water, though there is some dissatisfaction with hardness.

■ Very Satis.
 ■ Smwt. Satis.
 ■ DK/NA
 ■ Smwt. Dissatis.
 ■ Very Dissatis.

Total Satis. **Total Dissatis.**



92% **7%**



85% **13%**



84% **15%**



82% **9%**



80% **18%**



56% **29%**

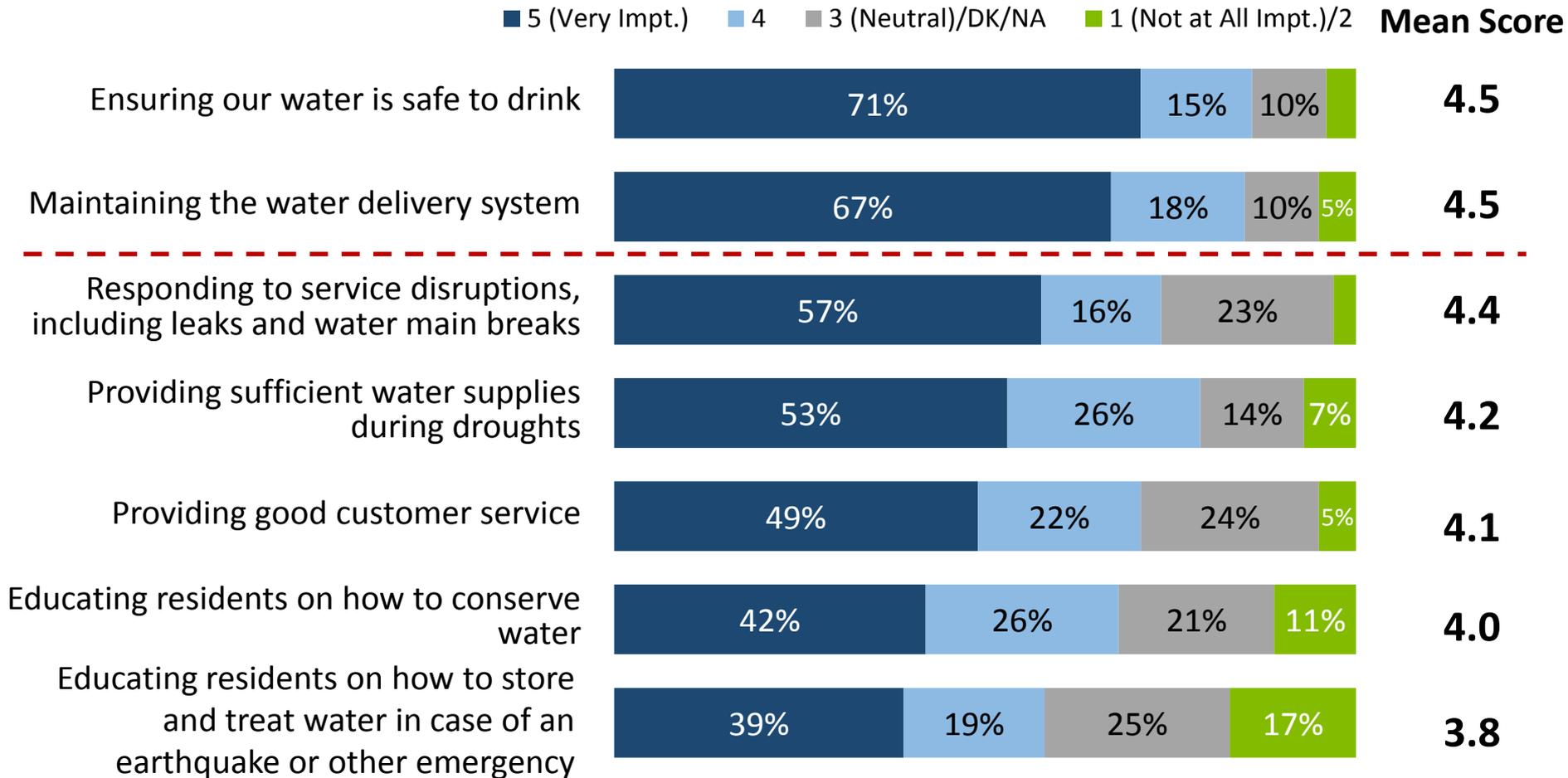
Who is dissatisfied with hardness?

- ✓ Overall, three in ten (29%) are dissatisfied with mineral content in their water.
- ✓ The small groups with an unfavorable view of ACWD or who believe their water rates are unreasonable are, at the same time, particularly dissatisfied with hardness.
- ✓ Those who filter their tap water are a bit more likely to say they're dissatisfied with hardness.
- ✓ Higher-income households, Union City customers, and those with the highest bills and newer accounts are more dissatisfied.



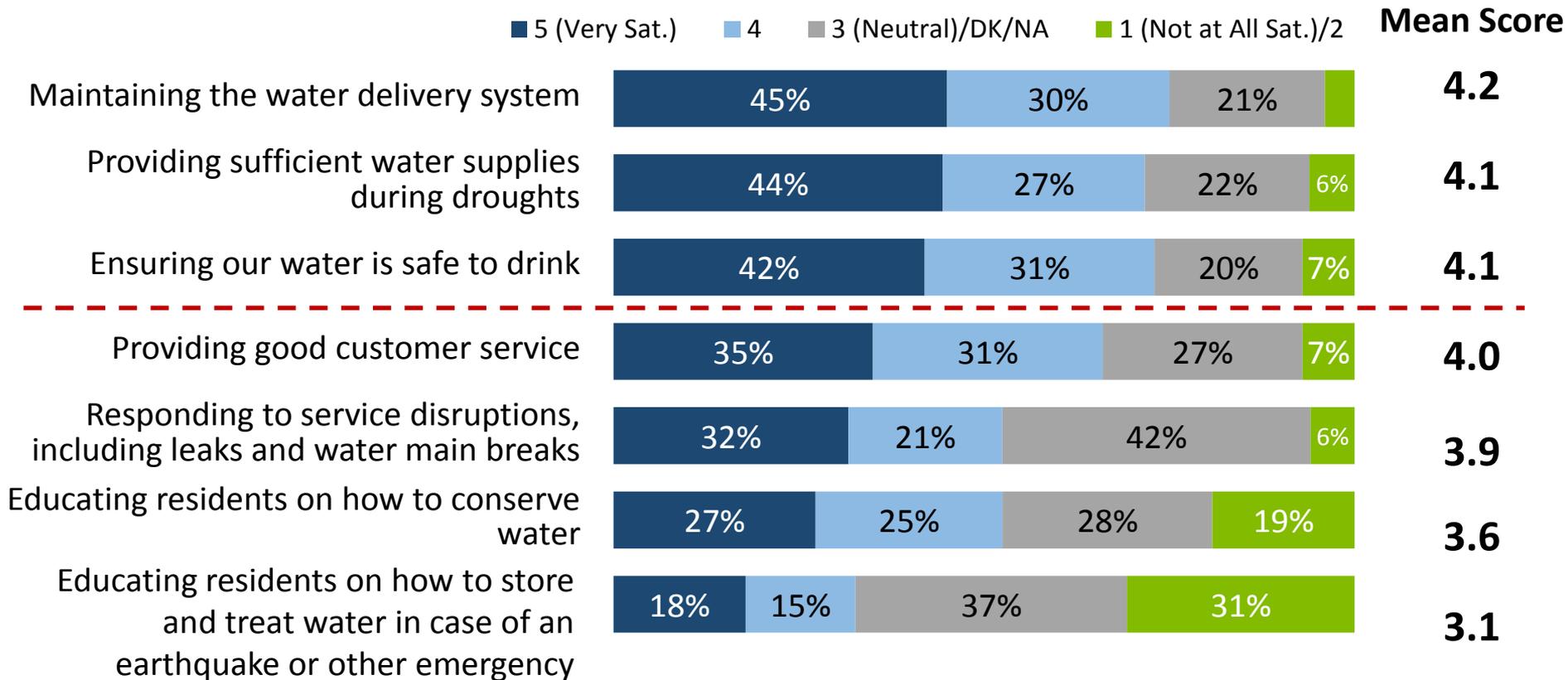
Safety and maintenance are top priorities.

I'm going to read you some Alameda County Water District responsibilities. Please tell me how important you feel each is for the Water District to do, using a 1-5 scale where 1 means "not at all important" and 5 means "very important." Feel free to use any number from 1 to 5 to express your opinion.



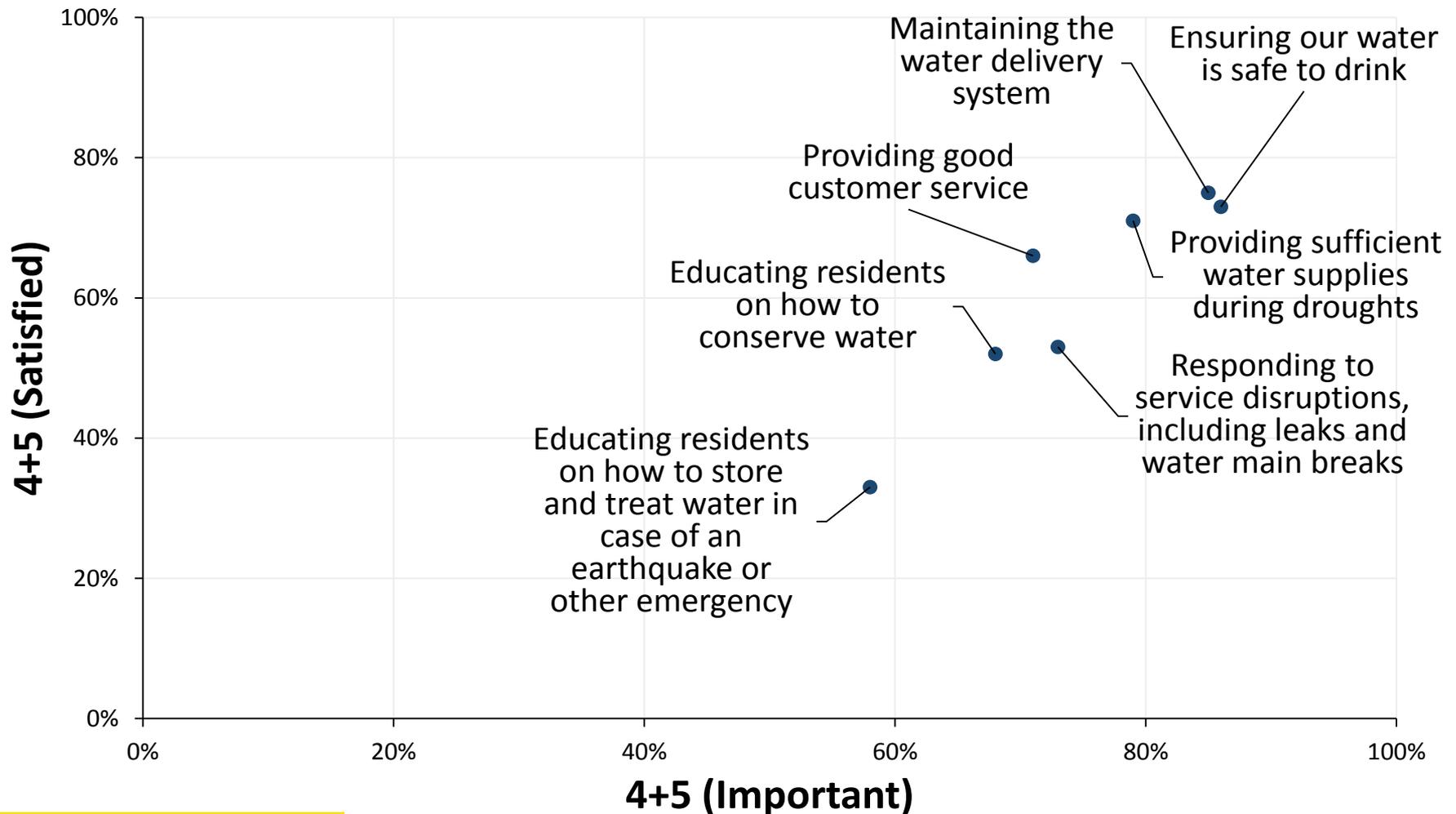
System maintenance, safety and supply get the highest satisfaction ratings.

Now, I'm going to read you the same list of Alameda County Water District responsibilities. For each item, please tell me how satisfied you are with the job the Water District is doing, using a one-to-five scale where one means you are "not at all satisfied" and five means you are "very satisfied." Feel free to use any number from one to five to express your opinion



Now we can plot importance by satisfaction, focusing on percentage of 4's and 5's for each metric.

Generally speaking, customers are most satisfied with the District responsibilities they deem most important.



While importance scores decreased slightly from 2011, satisfaction scores remained relatively unchanged.

Responsibility	Importance Mean Score			Satisfaction Mean Score		
	2011	2017	Δ	2011	2017	Δ
Educating residents on how to store and treat water in case of an earthquake or other emergency	4.3	3.8	-0.5	3.2	3.1	-0.1
Educating residents on how to conserve water	4.2	4.0	-0.2	3.8	3.6	-0.2
Providing sufficient water supplies during droughts	4.5	4.2	-0.3	4.0	4.1	+0.1
Ensuring our water is safe to drink	4.8	4.5	-0.3	3.9	4.1	+0.2
Responding to service disruptions, including leaks and water main breaks	4.6	4.4	-0.2	3.8	3.9	+0.1

Q23. I am going to read you a list of ways the Alameda County Water District may communicate with you. Please tell me whether you would definitely pay attention, maybe pay attention, or definitely not pay attention to information from the Water District if it were presented to you in that way. Split Sample

What Do They Think of ACWD Programs?

Emergency response and environmental protection are seen as the most important ACWD projects.

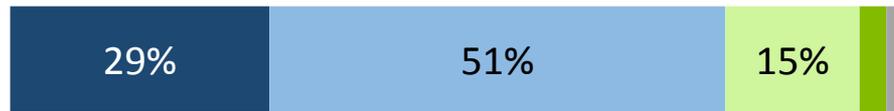
■ Ext. Impt. ■ Very Impt. ■ Smwt. Impt. ■ Not Impt. ■ DK/NA **Ext./Very Impt.**

Ensuring fire hydrants have enough water pressure to help fight fires



86%

Upgrading the water delivery system to critical facilities - such as hospitals - to protect against earthquakes



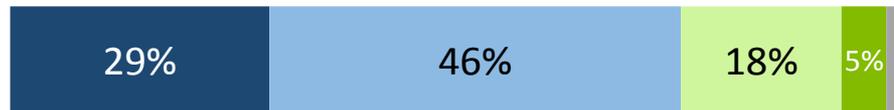
80%

^Upgrading the water delivery systems to protect against earthquakes



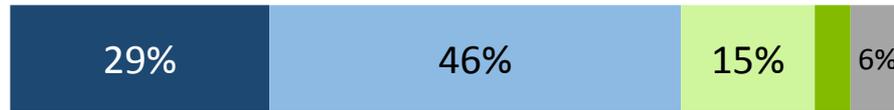
78%

^Planning for future demands on the water supply



75%

Monitoring and protecting the Alameda Creek watershed



75%

Restoring Alameda Creek to protect threatened steelhead trout

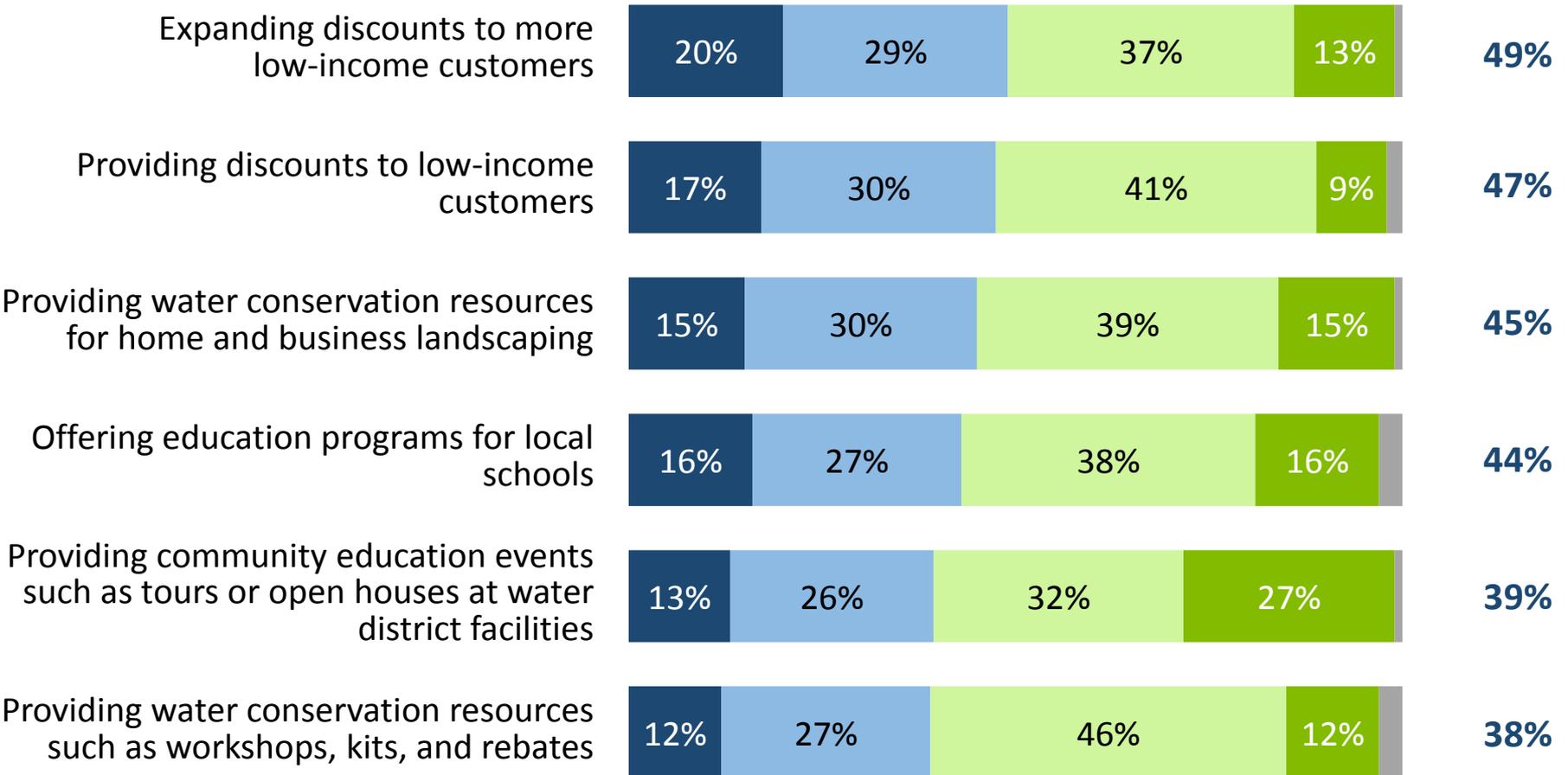


57%

Q15. I am going to read you a list of projects that could be undertaken by the Alameda County Water District. Please tell me how important it is to you that each project be undertaken: extremely important, very important, somewhat important, or not important. ^Not Part of Split Sample

Discounts, education and education programs are relatively less urgent programs.

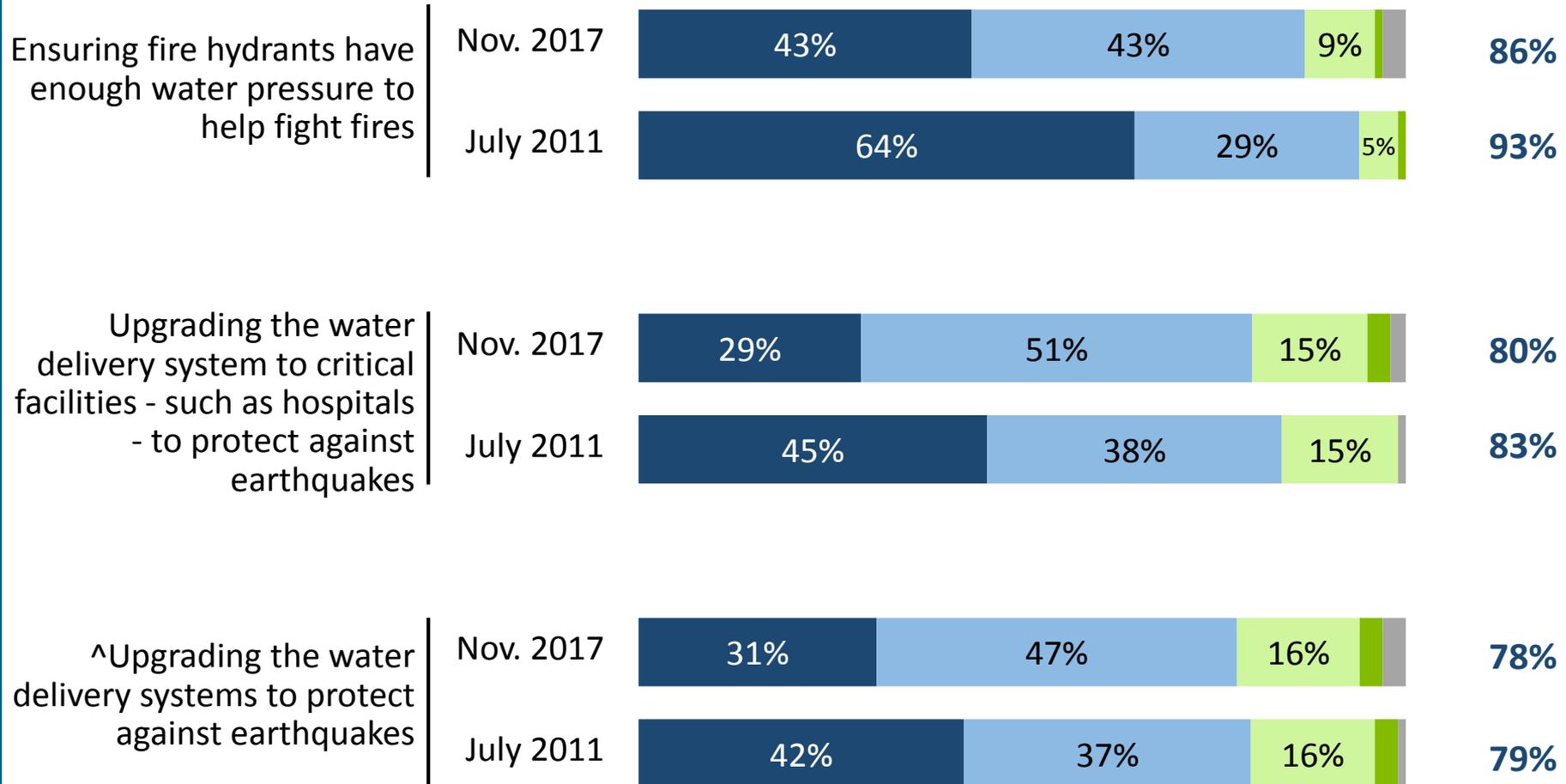
■ Ext. Impt. ■ Very Impt. ■ Smwt. Impt. ■ Not Impt. ■ DK/NA **Ext./Very Impt.**



Q15. I am going to read you a list of projects that could be undertaken by the Alameda County Water District. Please tell me how important it is to you that each project be undertaken: extremely important, very important, somewhat important, or not important. Split Sample

Compared with prior years, these projects are less urgent priorities.

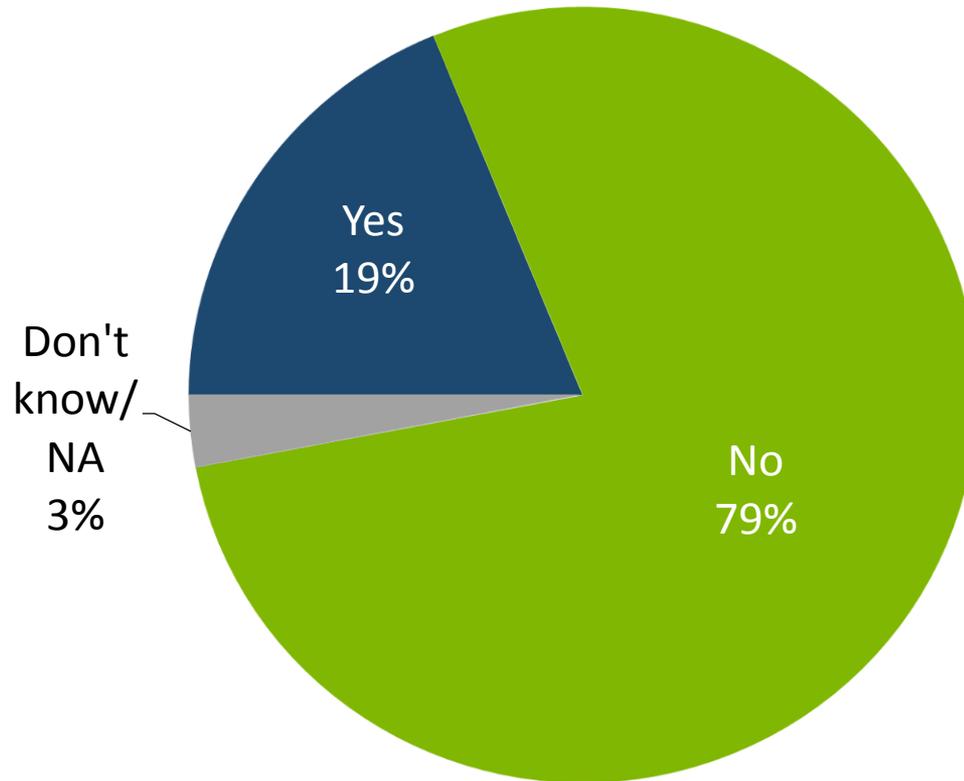
■ Ext. Impt. ■ Very Impt. ■ Smwt. Impt. ■ Not Impt. ■ DK/NA **Ext./Very Impt.**



Q15b, c & h. I am going to read you a list of projects that could be undertaken by the Alameda County Water District. Please tell me how important it is to you that each project be undertaken: extremely important, very important, somewhat important, or not important. ^Not Part of Split Sample

Relatively few have heard of Help on Tap.

Are you familiar with the Alameda County Water District's customer bill payment assistance program, Help on Tap?



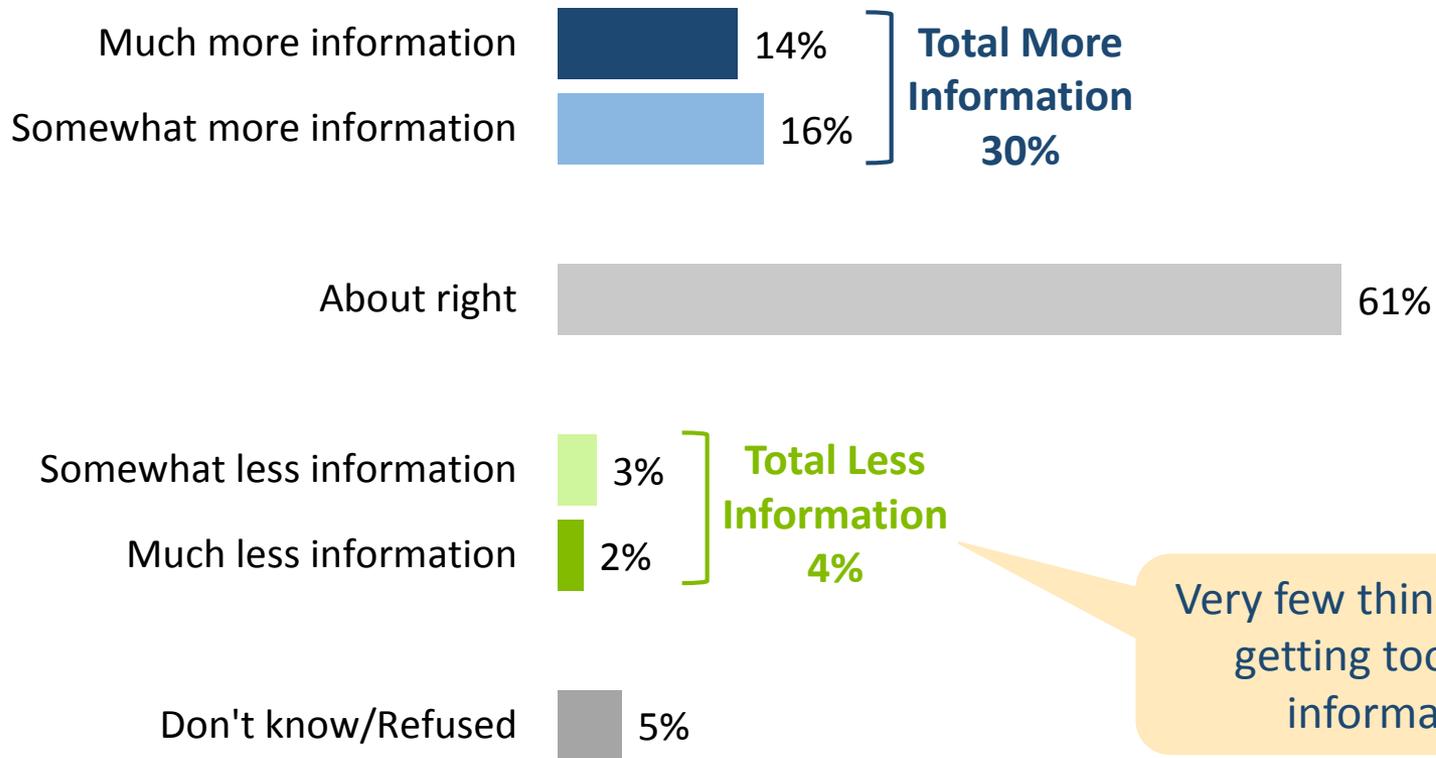
- ✓ Low-income households are *no more likely* to have heard of the program – in fact, those earning \$100K-\$150K are among the most likely to have heard of it
- ✓ Those with higher bills and the oldest accounts are also disproportionately likely to be familiar



Communications

A majority feels they are getting the right amount of information from the district already.

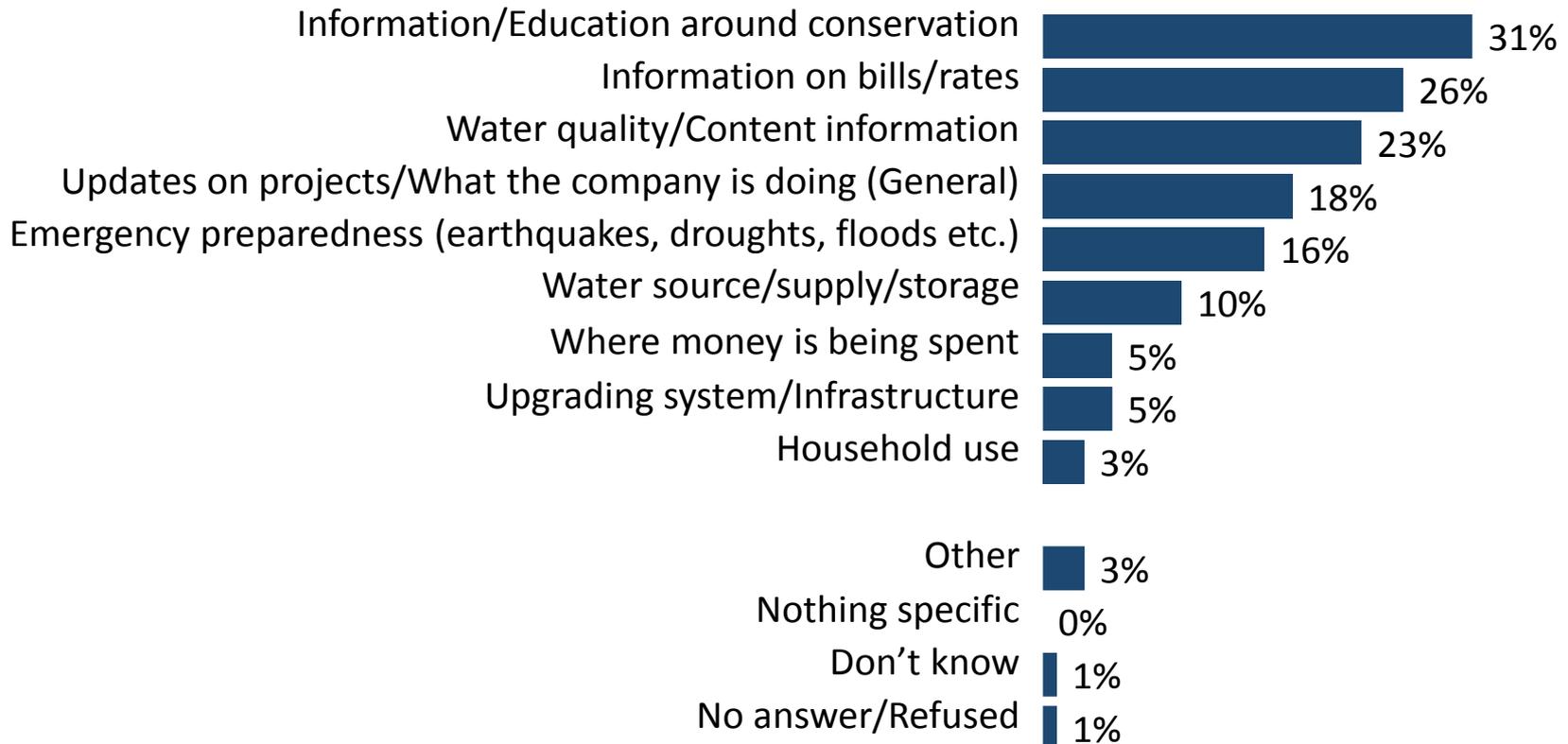
Overall, would you prefer to have more information about your water district, less information, or is the amount you receive about right?



Bill information, water quality and conservation are areas for more information.

What types of information would you like to receive more of?

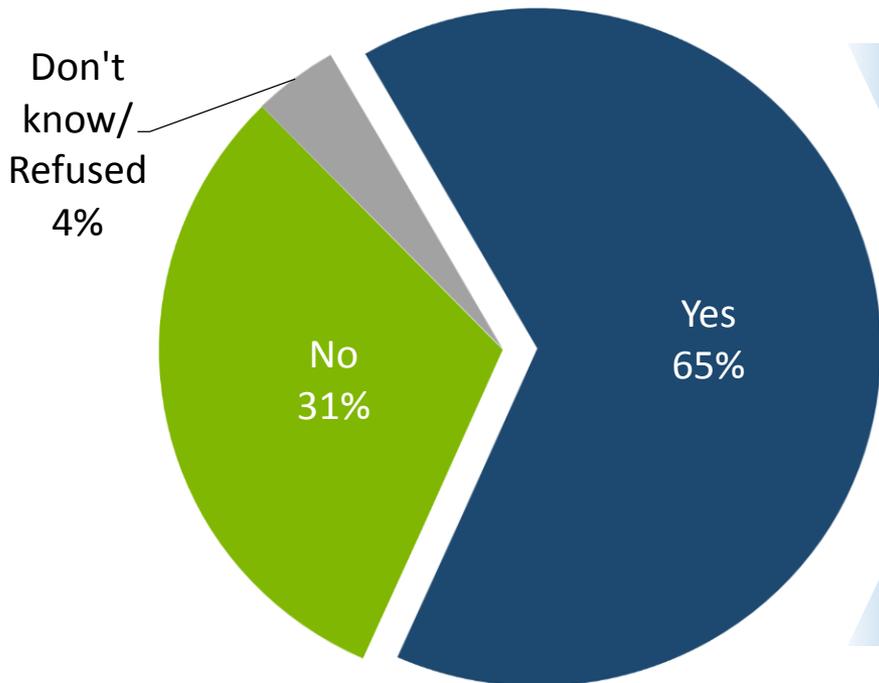
(Asked of those whom want more information)



Those who receive the newsletter think it's helpful.

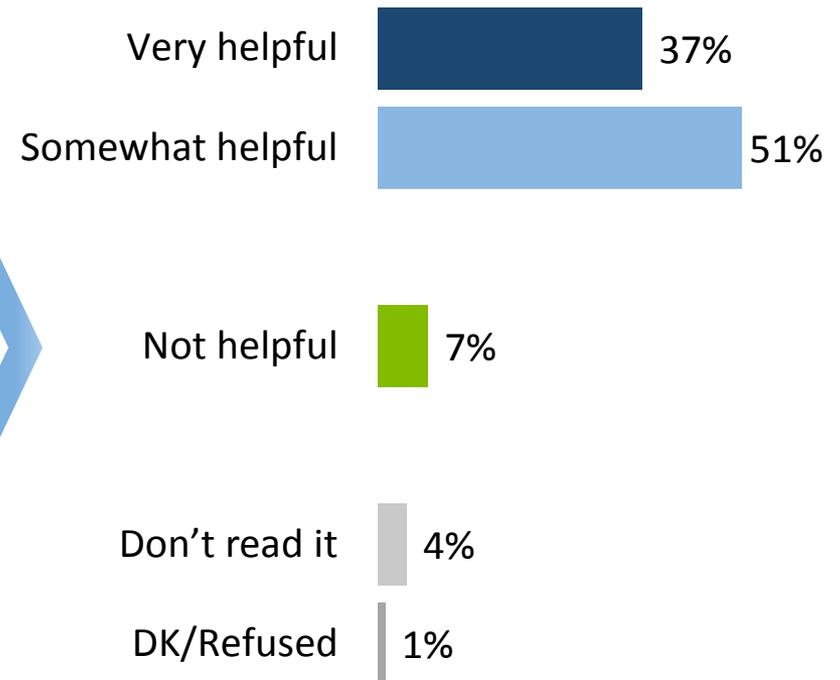
Three times each year the Alameda County Water District mails a newsletter called the ACWD Aqueduct. Do you recall having received this newsletter in the past?

Asked of Non-bill-paying Customers and Bill-paying Customers With Mail Bills, N=412



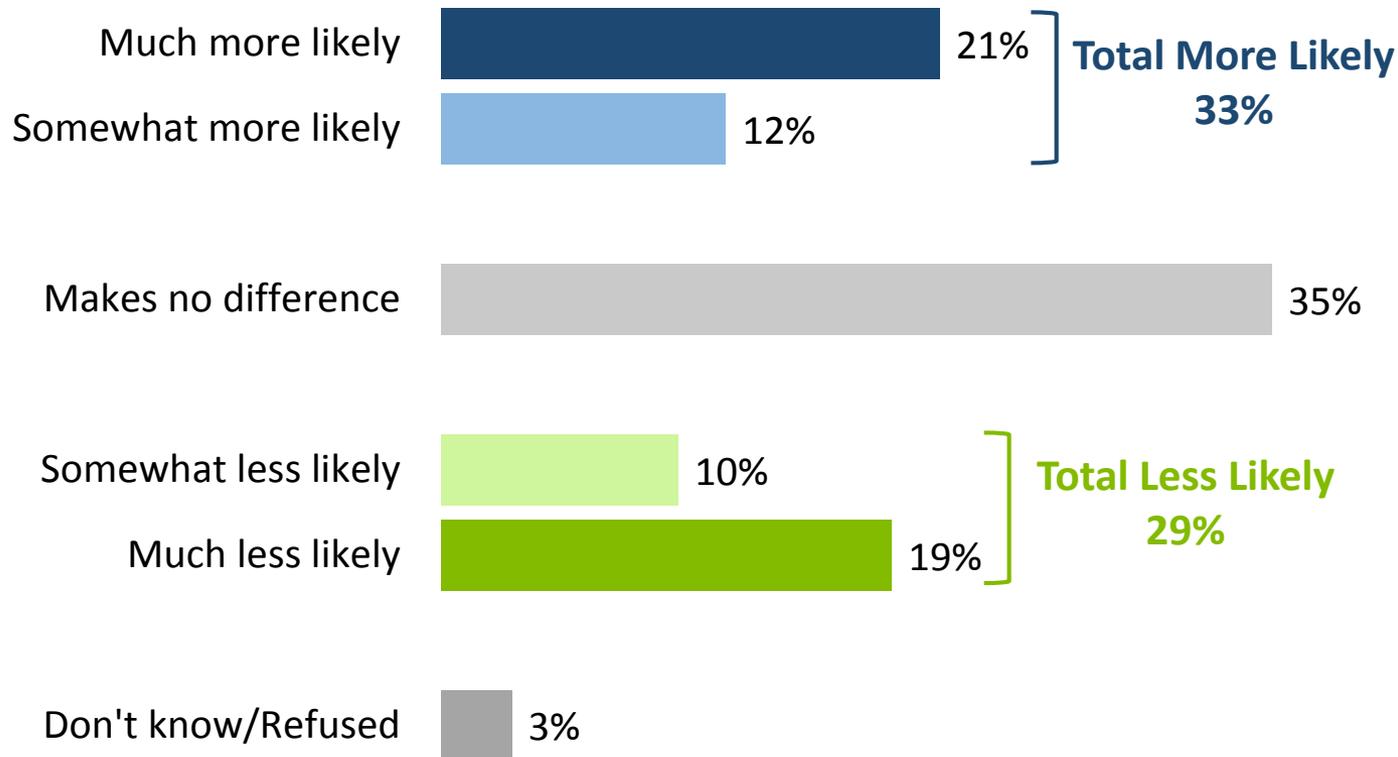
How helpful did you find the ACWD Aqueduct in learning about water and water issues in your community?

Asked of Those Who Recall Receiving Newsletter, N=266

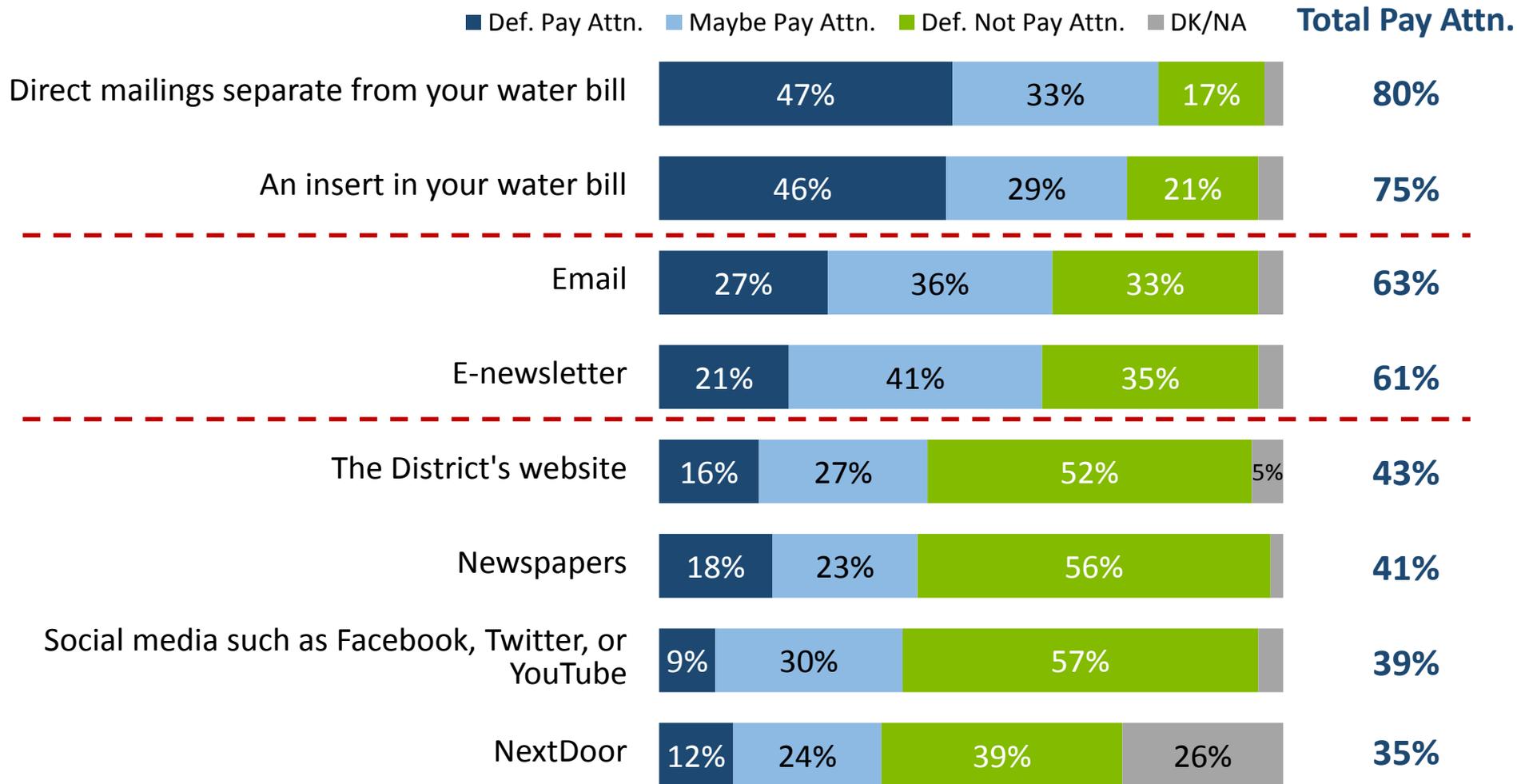


Customers are split on whether they would prefer an email newsletter.

If an e-newsletter were available, instead of a mailed newsletter, would you be more or less likely to read it, or would it make no difference?



Asked more directly, most say they would pay attention to a mail piece.



Q23. I am going to read you a list of ways the Alameda County Water District may communicate with you. Please tell me whether you would definitely pay attention, maybe pay attention, or definitely not pay attention to information from the Water District if it were presented to you in that way. Split Sample

Direct mail is still more popular among bill-paying and non-bill-paying customers alike.

(Definitely/Maybe Pay Attention)

Ways of Communication	All Voters	Customer Type		Bill Type	
		Bill-Paying Customers	Non-Bill-Paying Customers	Mail	Electronic
Direct mailings separate from your water bill	80%	83%	68%	82%	83%
An insert in your water bill	75%	77%	65%	80%	67%
Email	63%	67%	47%	60%	86%
E-newsletter	61%	63%	54%	56%	84%
The District's website	43%	41%	49%	40%	47%
Newspapers	41%	41%	45%	40%	43%
Social media such as Facebook, Twitter, or YouTube	39%	37%	48%	33%	50%
NextDoor	35%	37%	29%	35%	41%

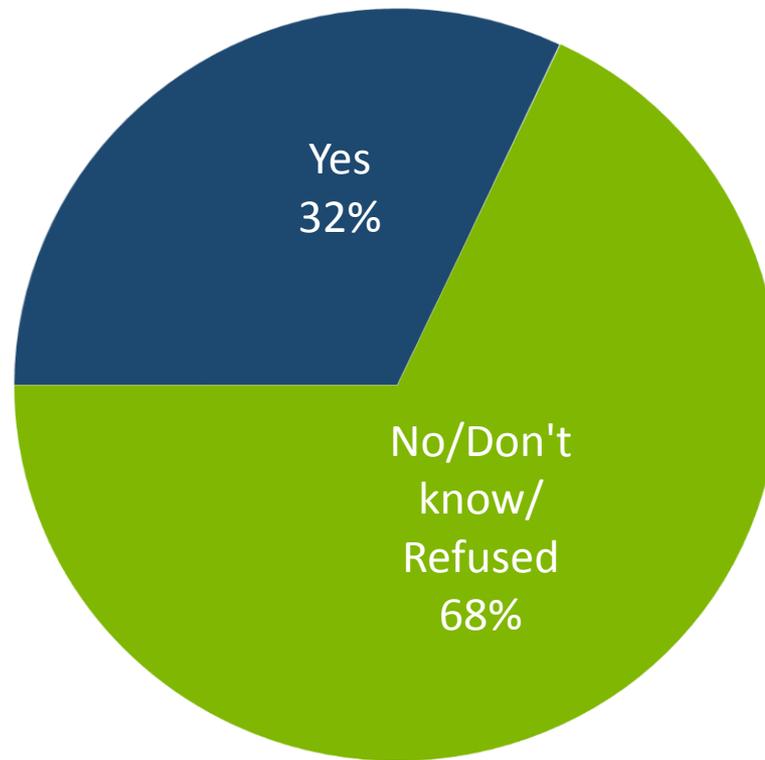
Younger customers are more likely to pay attention to digital sources overall.

(Definitely/Maybe Pay Attention)

Ways of Communication	All Voters	Age		Ethnicity		
		18-49	50+	Latinos	Asians/ Pacific Islanders	Whites
Direct mailings separate from your water bill	80%	76%	85%	77%	84%	77%
An insert in your water bill	75%	75%	78%	83%	70%	76%
Email	63%	71%	56%	69%	69%	61%
E-newsletter	61%	71%	53%	72%	62%	62%
The District's website	43%	44%	42%	43%	53%	34%
Newspapers	41%	35%	47%	56%	44%	41%
Social media such as Facebook, Twitter, or YouTube	39%	55%	21%	30%	51%	28%
NextDoor	35%	39%	29%	28%	38%	36%

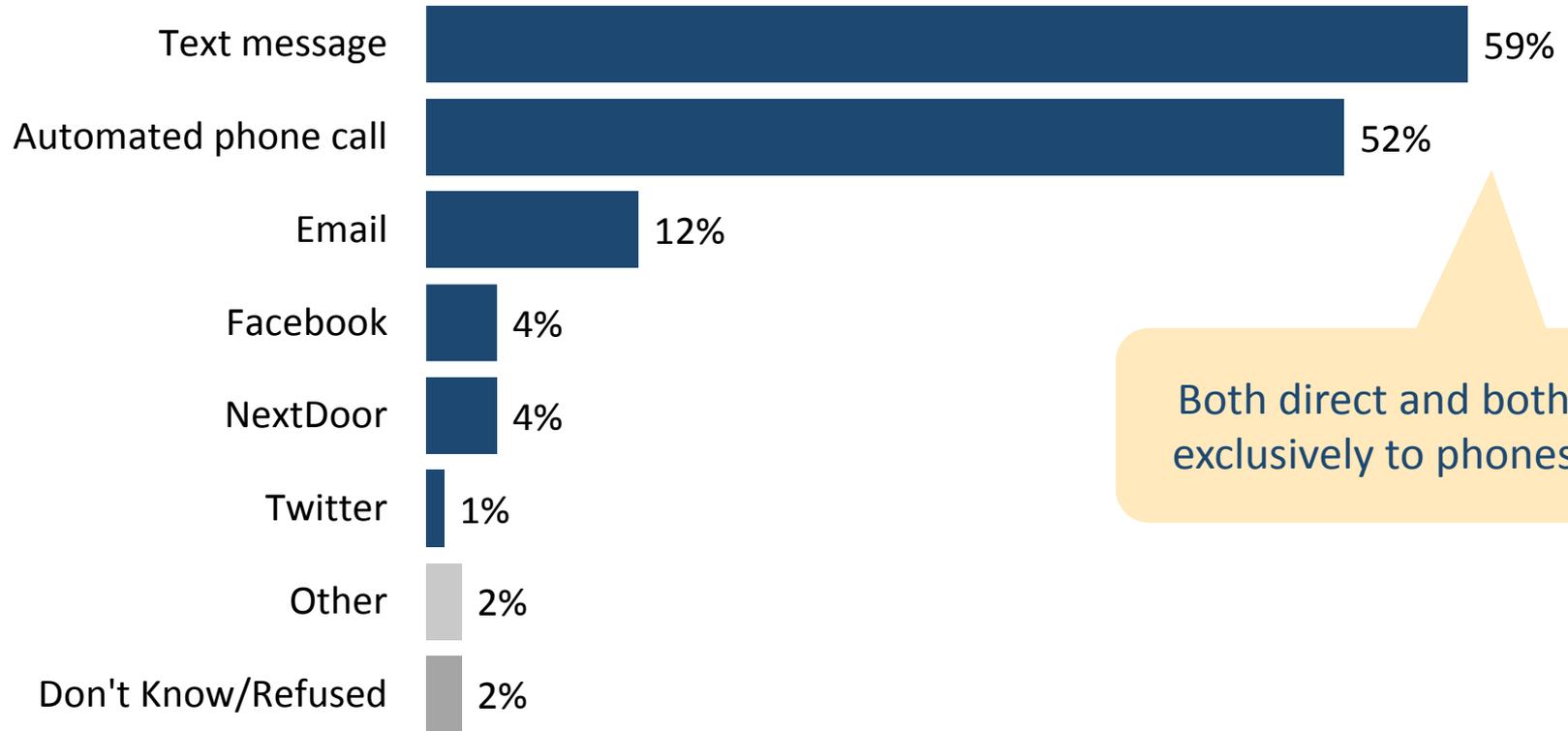
Most are not familiar with ways to get emergency automated calls.

Are you familiar with ways to receive automated phone calls regarding water-related emergencies?



Phone call or text are most broadly desired modes of contact in an emergency.

How would you prefer the Alameda County Water District contact you in the case of an emergency that requires you to take immediate action?



Both direct and both exclusively to phones

Renters, younger customers and customers of color like text messages.

(Multiple Responses Accepted)

Demographic Groups	Social Media	Email	Text	Call	Other/DK/Refused
Customer Type					
Bill-Paying Customers	6%	11%	58%	55%	3%
Non-Bill-Paying Customers	12%	16%	65%	39%	8%
Bill Type					
Mail	6%	11%	55%	58%	3%
Electronic	7%	13%	68%	47%	1%
Age					
18-49	9%	15%	75%	42%	2%
50+	6%	8%	42%	63%	5%
Ethnicity					
Latinos	3%	7%	71%	41%	7%
Asians/Pacific Islanders	9%	18%	67%	49%	2%
Whites	7%	8%	49%	57%	4%

Conclusions

Conclusions – General ACWD Impressions

- ✓ Customers have quite positive views of the Alameda County Water District, both in general and specifically related to the job they are doing, and those positive impressions have strengthened slightly since 2011.
- ✓ While those with higher bills are slightly less enthusiastic, non-bill-paying customers give the District particularly high ratings.
- ✓ However, only a little more than one-quarter of non-bill-paying customers could correctly identify ACWD as their provider.
- ✓ Most also feel good about how the drought was handled.
- ✓ Overwhelming majorities feel their water is safe and high-quality, but half filter their tap water before they drink it.
- ✓ Hardness appears to be the only real criticism of the water, though.

Conclusions – Rates

- ✓ Around two-thirds of bill-paying customers feel what the pay is “reasonable” and that they receive “good value” for what they pay.
- ✓ This is comparable to their perceptions of the electrical service, but water costs aren’t seen as quite as reasonable as their garbage and waste collection bills.
- ✓ Additionally, slightly fewer feel good about what they pay now compared to when last asked in 2011.
- ✓ Support for tiered pricing has remained the same at just shy of three in five customers.

Conclusions – Communications

- ✓ Most feel content with the amount information they receive from the District. Those who are not content are far more likely to say they want more information than less.
- ✓ Those who want more information would like to learn more about water conservation, rates, and safety, and not necessarily things about infrastructure.
- ✓ Majorities recall receiving *The Aqueduct* and feel it is helpful.
- ✓ Attitudes are sharply divided as to whether digital newsletters would be better than mailed newsletters, with divisions following predictable generational patterns.
- ✓ All customers seem to prefer emergency contacts on their phones, either as calls or texts, with younger customers, Latinos, Asian/Pacific Islanders, and e-bill recipients preferring texts over calls.

For more information, contact:



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