

2015 JPUD Customer Survey Re-analysis

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Survey Instrument: one page, nine questions, five-point scale, two versions.

Mailed to all 18,000 customers by SDS Research. Also on-line (Version 1)

Return Rate: 19.2%

| Total Completed Surveys 2015 | |
|------------------------------|-------|
| BY MAIL | 3,309 |
| ONLINE | 139 |
| TOTAL | 3,448 |

| | | Frequency | Percent |
|---------|-------|-----------|---------|
| Version | 1 | 1742 | 50.5 |
| | 2 | 1706 | 49.5 |
| | Total | 3448 | 100.0 |

SDS Analysis: Net Positive Index

Difference between top (5) ratings and bottom (1, 2 and 3) ratings. Adding 100 keeps NPI greater than 0. Four ratings are considered “satisfied”

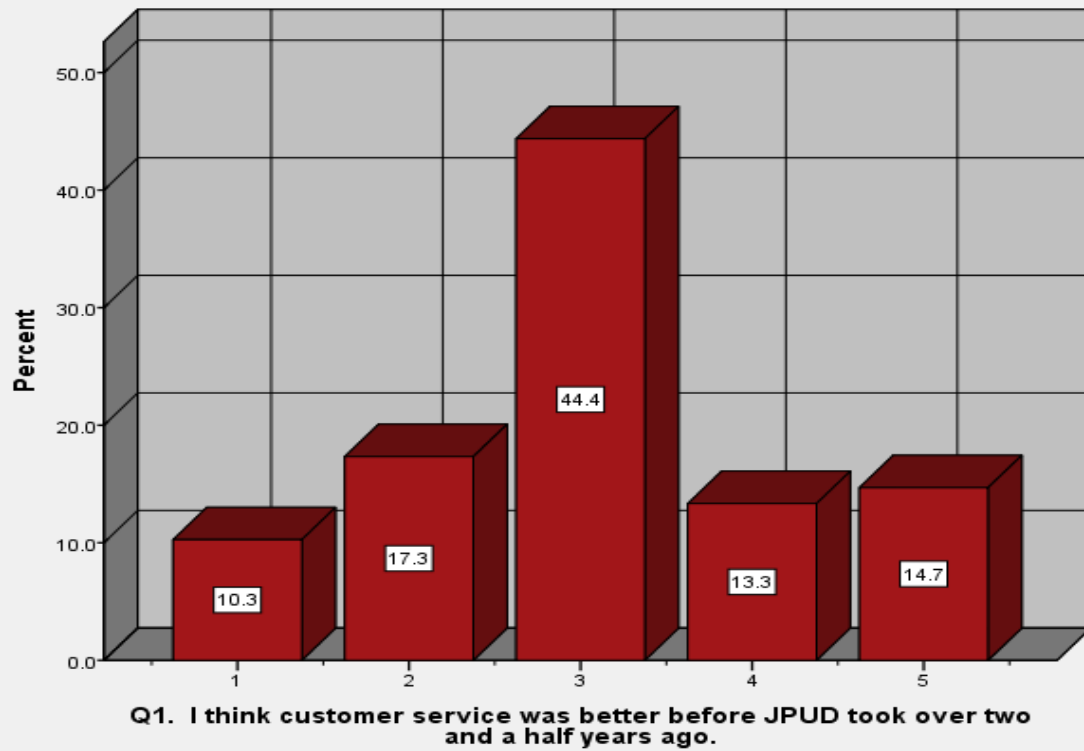
$$\text{NPI} = [(5) - (1+2+3)] + 100$$

[Example]* Overall Satisfaction: 11% rate 5, 16% rate 4, 73% rate either 1, 2 or 3. NPI = 38 [(11– 73) + 100] approx.

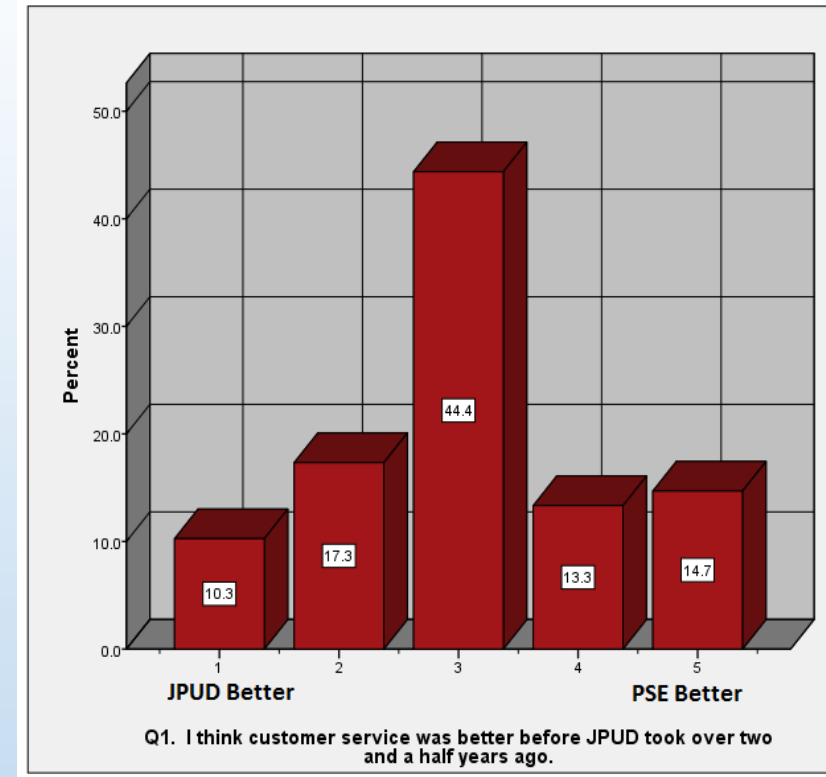
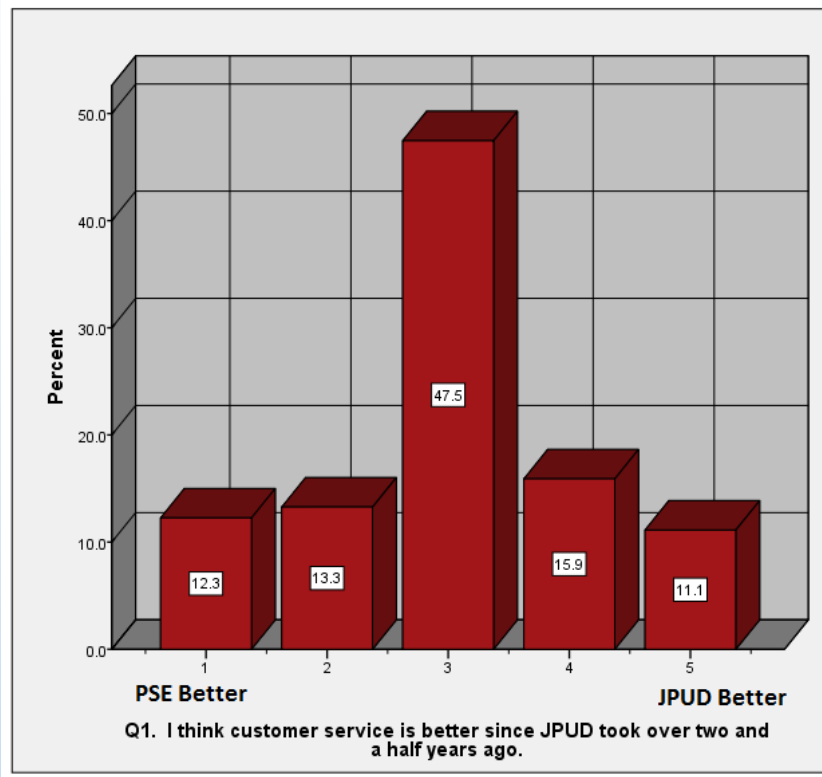
| | 5 Rating | 4 Rating | 1-3 Rating | Totals | NPI |
|---------|----------|----------|------------|-----------|-----|
| Overall | 186/11% | 266/16% | 1221/73% | 1673/100% | 38 |

*All numbers are rounded to the nearest whole number.

*Example is from Q1 on Version 1 survey.



- **Re-analysis Method: Add “Strongly Agree” and “Agree”. Add “Disagree” and “Strongly Disagree”. Set aside “Neutral”. Reverse score for Negative items. Compute the ratio of boxes 1 and 2 to boxes 3 and 4. Combine both versions. Compute a Mean Ratio. Compute a Mean Neutral.**



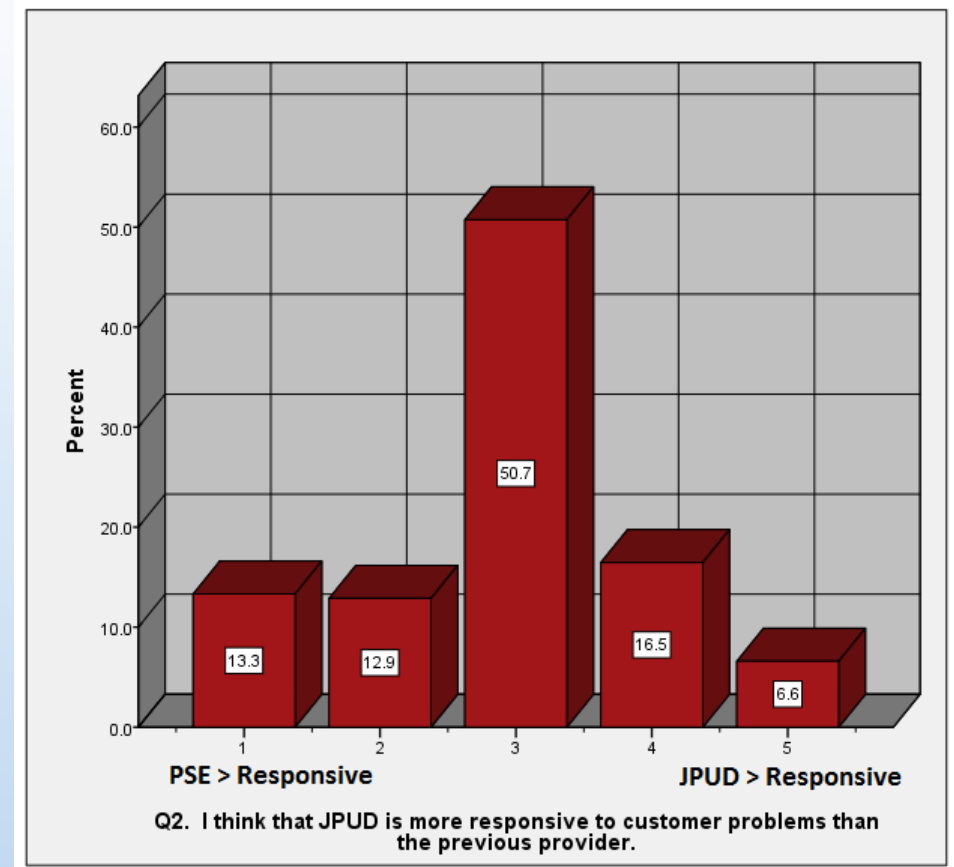
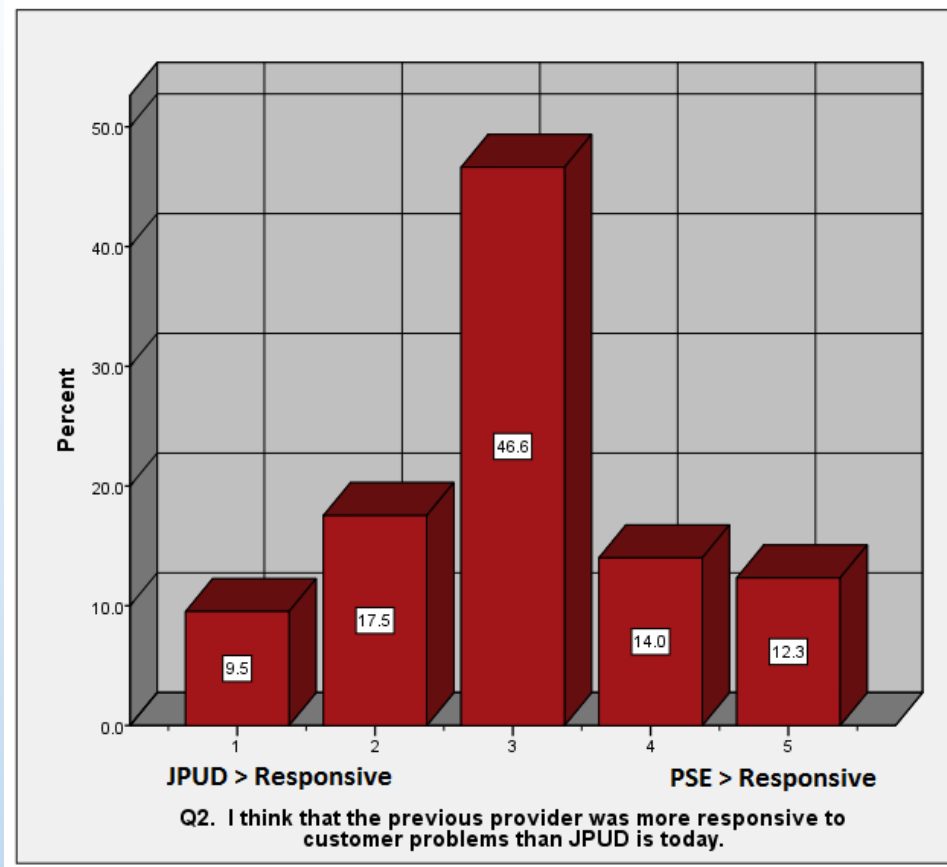
Q1. I think customer service is better since JPUD took over two and a half years ago. (V-1)
 I think customer service was better before JPUD took over two and a half years ago. (V-2)

| | <u>PSE better</u> | <u>JPUD better</u> | |
|-----------------|-------------------|--------------------|--------------------|
| See p. 16 (V-1) | 25.6 | 27.0 | $27.0/25.6 = 1.19$ |
| See p. 32 (V-2) | 28.0 | 27.6 | $27.6/28.0 = 0.99$ |

Mean Ratio = 1.09

Neutral (Box 3) = 46.0%

Summary finding: JPUD was judged to have slightly better customer service than PSE. Nearly half (46%) were undecided.

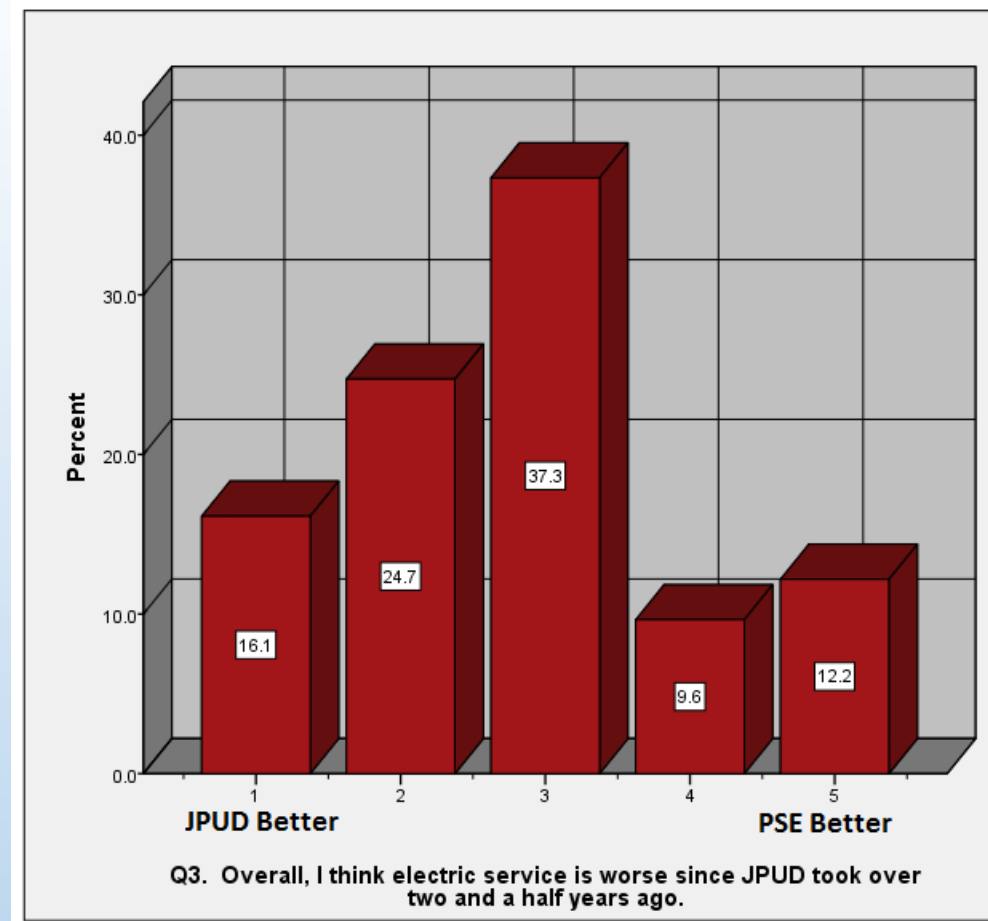
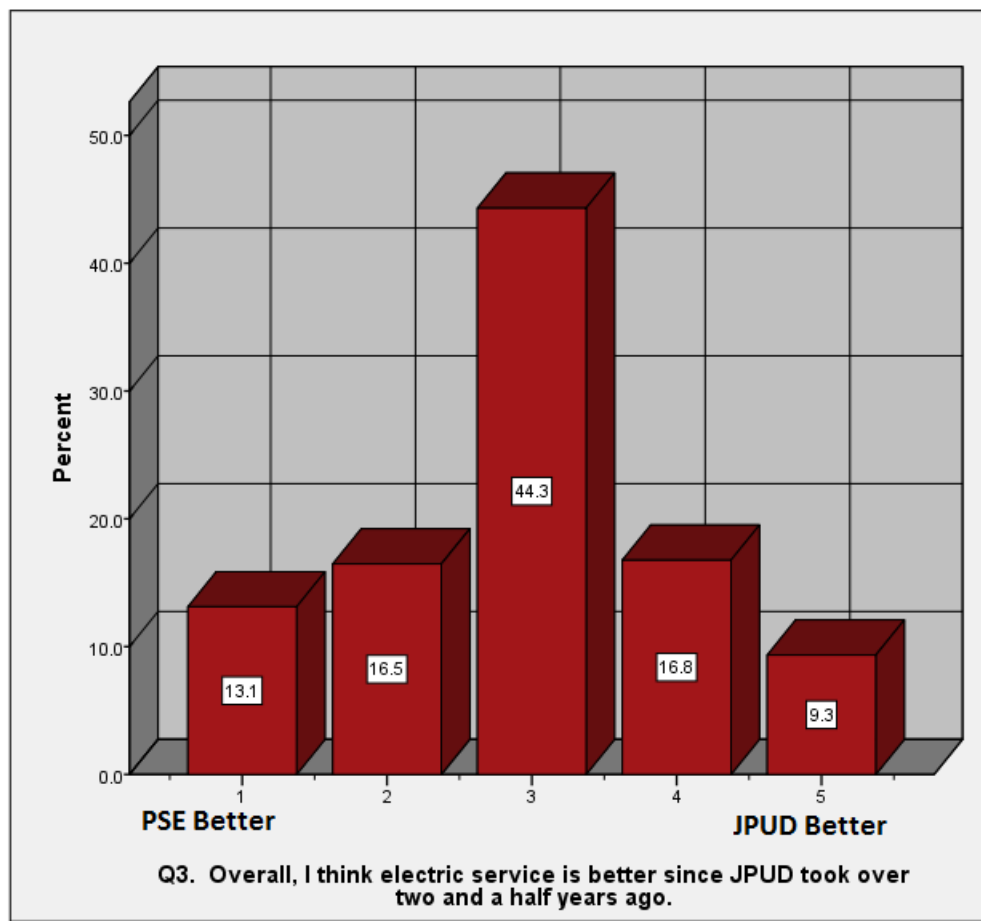


Q2. I think that the previous provider was more responsive to customer problems than JPUD is today. (V-1)

I think that JPUD is more responsive to customer problems than the previous provider. (V-2)

| | <u>PSE>responsive</u> | <u>JPUD>responsive</u> | |
|-------------------|--------------------------|---------------------------|--------------------|
| See p. 17 (V-1) | 26.3% | 27.0% | $27.0/26.3 = 1.03$ |
| See p.33 (V-2) | 26.2% | 23.1% | $23.1/26.2 = 0.88$ |
| Mean Ratio = 0.96 | | Neutral (Box 3) = 48.6% | |

Summary finding: JPUD was seen as slightly less responsive to customer problems today compared to the previous provider. However, nearly half (48.6%) of respondents were neutral.

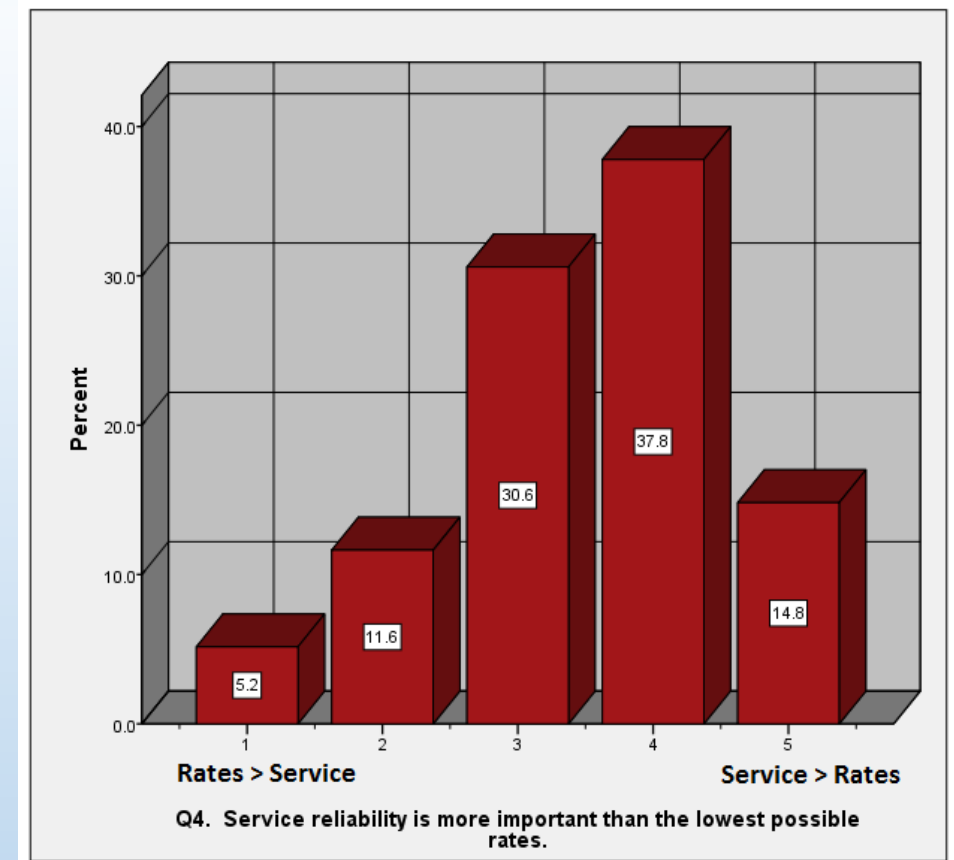
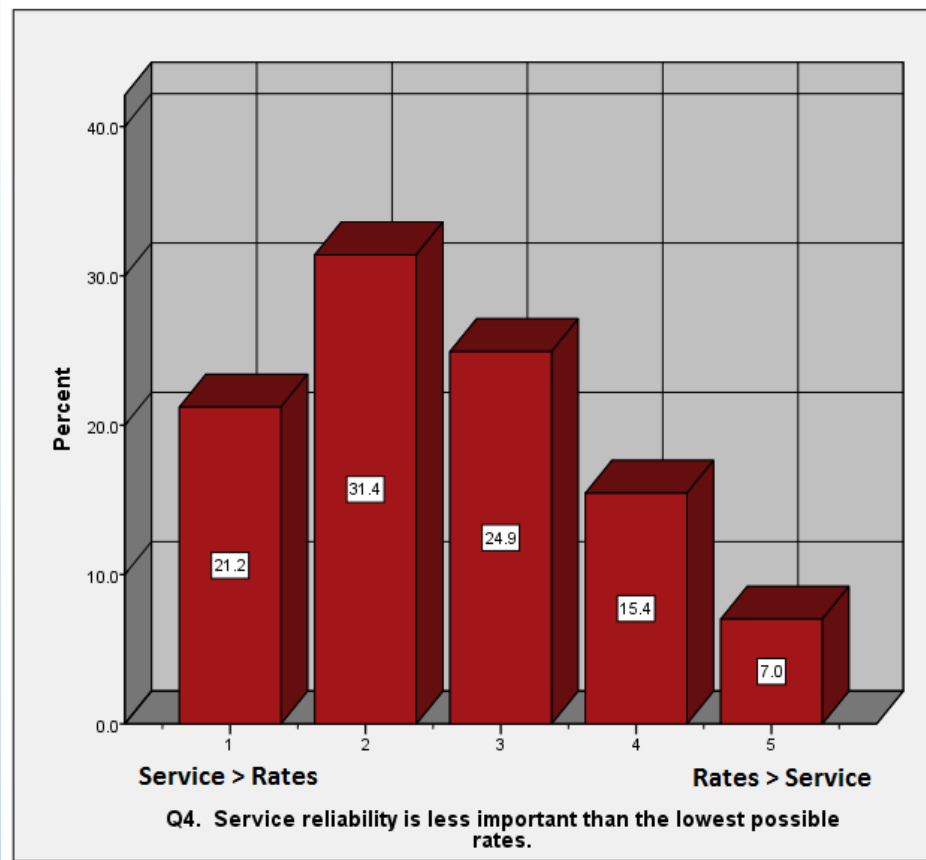


Q3. Overall, I think electric service is better since JPUD took over two and a half years ago. (V-1)

Overall, I think electric service is worse since JPUD took over two and a half years ago. (V-2)

| | <u>PSE better</u> | <u>JPUD better</u> | |
|--------------------------|-------------------|-------------------------|--------------------|
| See p. 18 (V-1) | 29.6% | 26.2% | $26.2/29.6 = 0.89$ |
| See p. 34 (V-2) | 21.8% | 40.8% | $40.8/21.8 = 1.87$ |
| Mean Ratio = <u>1.38</u> | | Neutral (Box 3) = 40.8% | |

Summary finding: JPUD is judged by respondents to have better electric service than PSE, by a ratio of 1.38 to 1. However, 40.8% of respondents were unable to decide.

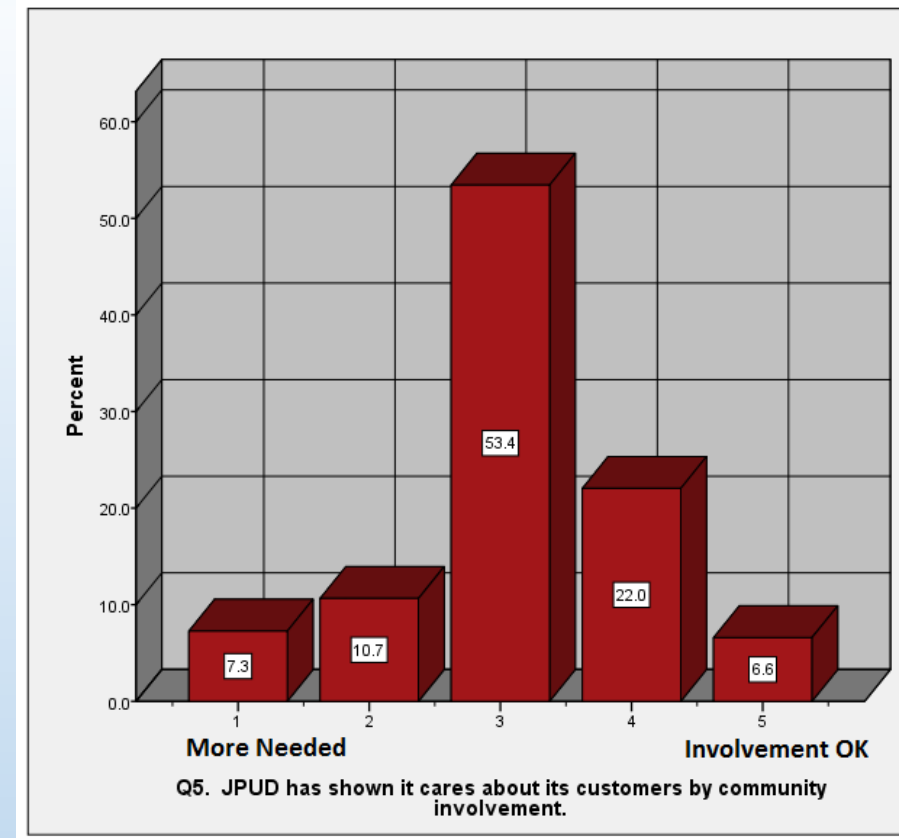
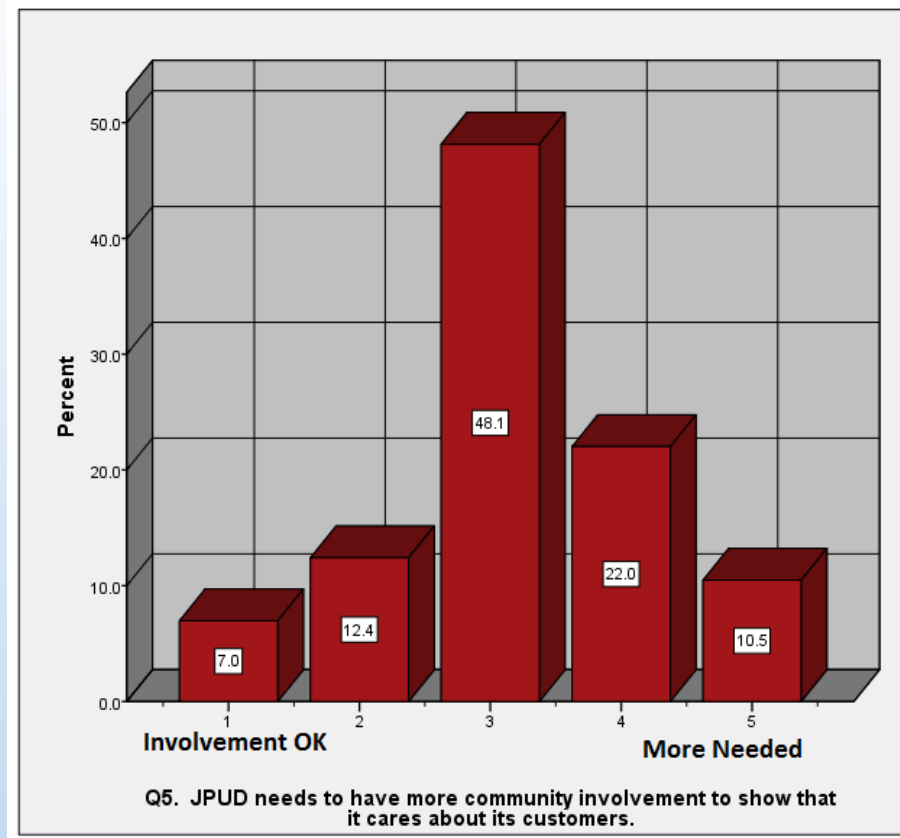


Q4. Service reliability is less important than the lowest possible rates. (V-1)

Service reliability is more important than the lowest possible rates. (V-2)

| | <u>Rates>Service</u> | <u>Service>Rates</u> | |
|-----------------|-------------------------|-------------------------|--------------------|
| See p. 19 (V-1) | 22.4% | 52.6% | $52.6/22.4 = 2.35$ |
| See p. 35 (V-2) | 16.8% | 52.6% | $52.6/16.8 = 3.13$ |
| Mean Ratio | $= \underline{2.74}$ | | |
| | | Neutral (Box 3) = 31.1% | |

Summary finding: In both versions of the question, respondents judged service reliability to be much more important than the lowest possible rates, by a ratio of 2.74 to 1. However, 31.1 percent of respondents were unable to decide.

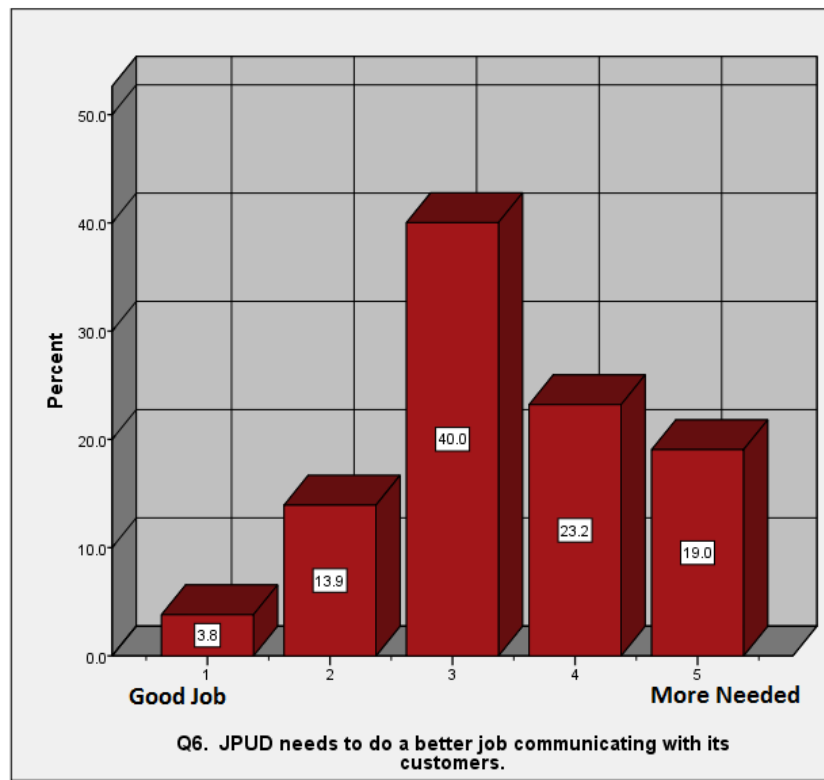
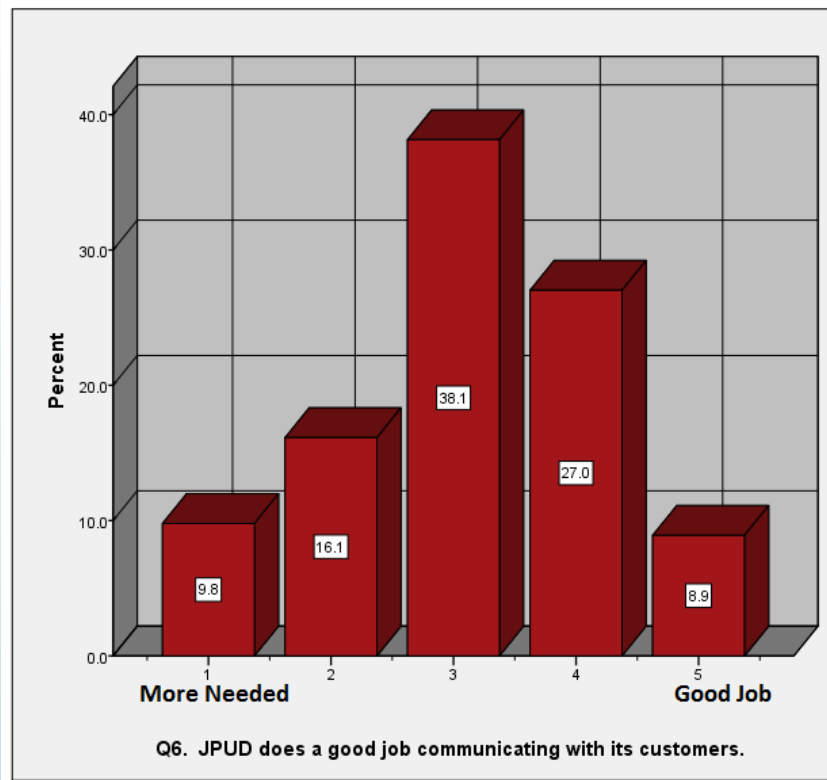


Q5. JPUD needs to have more community involvement to show that it cares about its customers. (V-1)

JPUD has shown it cares about its customers by community involvement. (V-2)

| | <u>More needed</u> | <u>Involvement OK</u> |
|--------------------------|-------------------------|-----------------------|
| See p. 20 (V-1) | 32.5 | 19.4 |
| See p. 36 (V-2) | 18.0 | 28.6 |
| Mean Ratio = <u>1.10</u> | | 19.4/32.5 = 0.60 |
| | | 28.6/18.0 = 1.59 |
| | Neutral (Box 3) = 50.8% | |

Summary finding: Slightly more than half the respondents, who took a position on this question, felt that JPUD's community involvement showed it cares about its customers. However, the Version 1 question suggested that more community involvement was needed. Over 60% of the Version 1 respondents agreed. Just over half (50.8%) of the total respondents were neutral on this question 5.

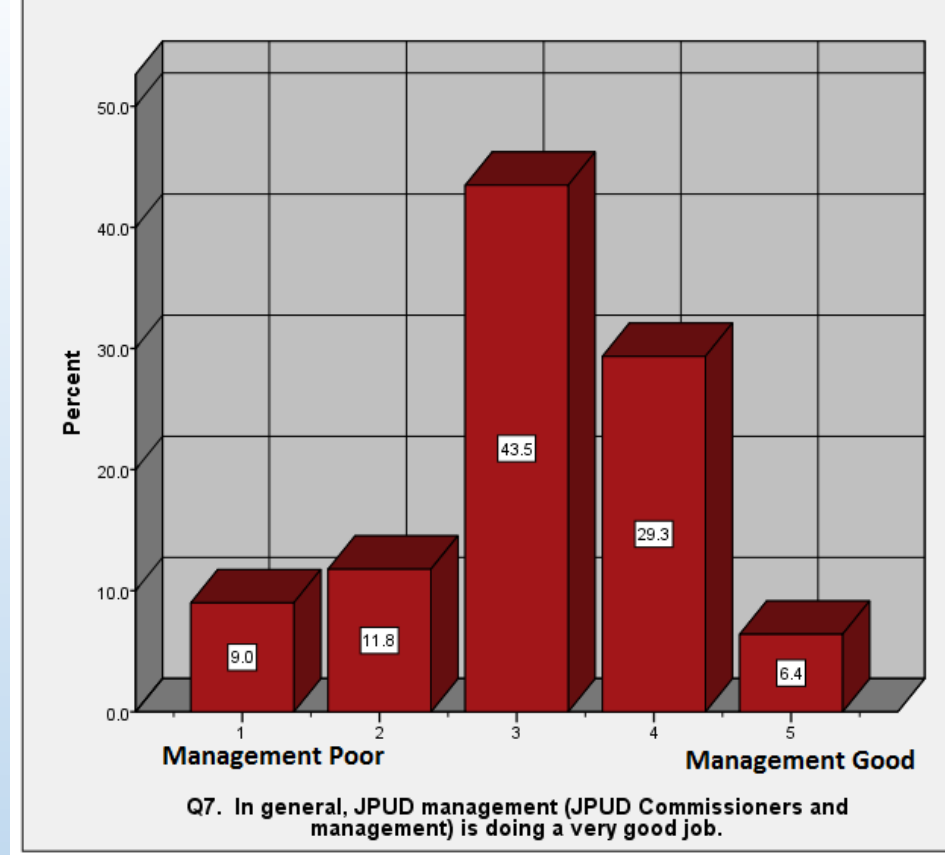
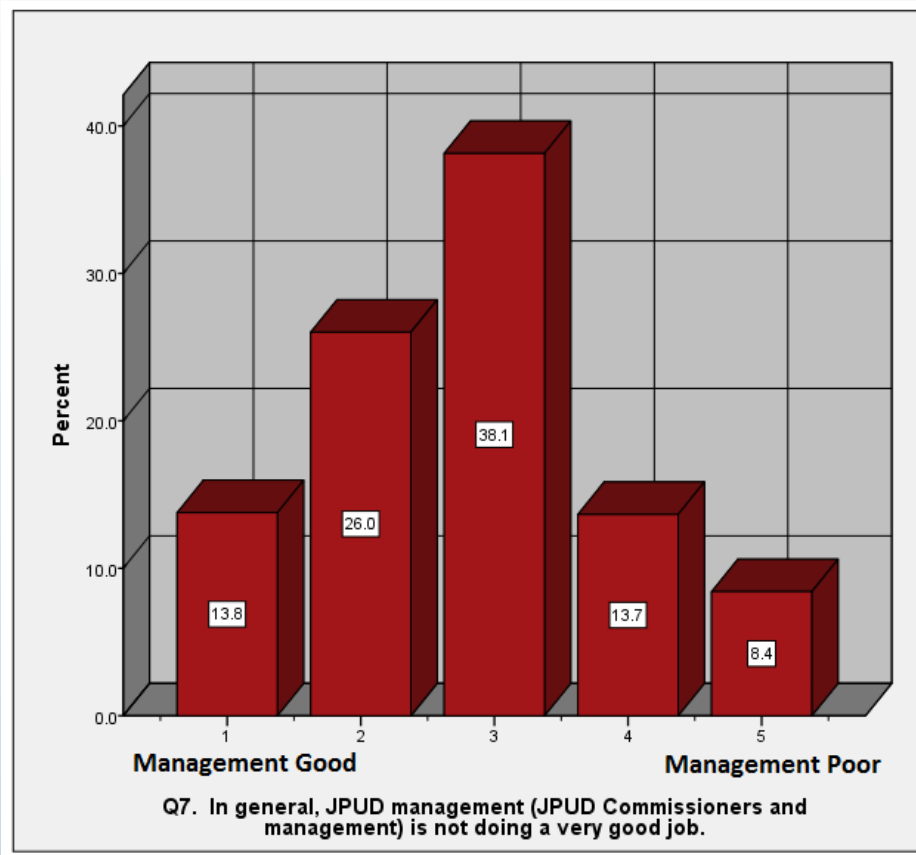


Q6. JPUD does a good job communicating with its customers. (V-1)

JPUD needs to do a better job communicating with its customers. (V-2)

| | <u>More needed</u> | <u>Doing good job</u> | |
|--------------------------|--------------------|-------------------------|--------------------|
| See p. 21 (V-1) | 25.9 | 35.9 | $35.9/25.9 = 1.39$ |
| See p. 37 (V-2) | 42.2 | 17.7 | $17.7/42.2 = 0.42$ |
| Mean Ratio = <u>0.90</u> | | Neutral (Box 3) = 39.0% | |

Summary finding: A slight majority of respondents felt a better job of communication was needed. Again, about 4 in 10 respondents were neutral. This question is an example of the tendency of respondents to “agree” regardless of the actual question content. In V-1, the ratio of doing a good job communicating was 1.39, a positive for JPUD communication. However, in V-2, the ratio was 0.42. This is a fairly strong signal that JPUD communication needs improvement. In other words people feel JPUD is doing a good job communicating, but improvement is still needed.

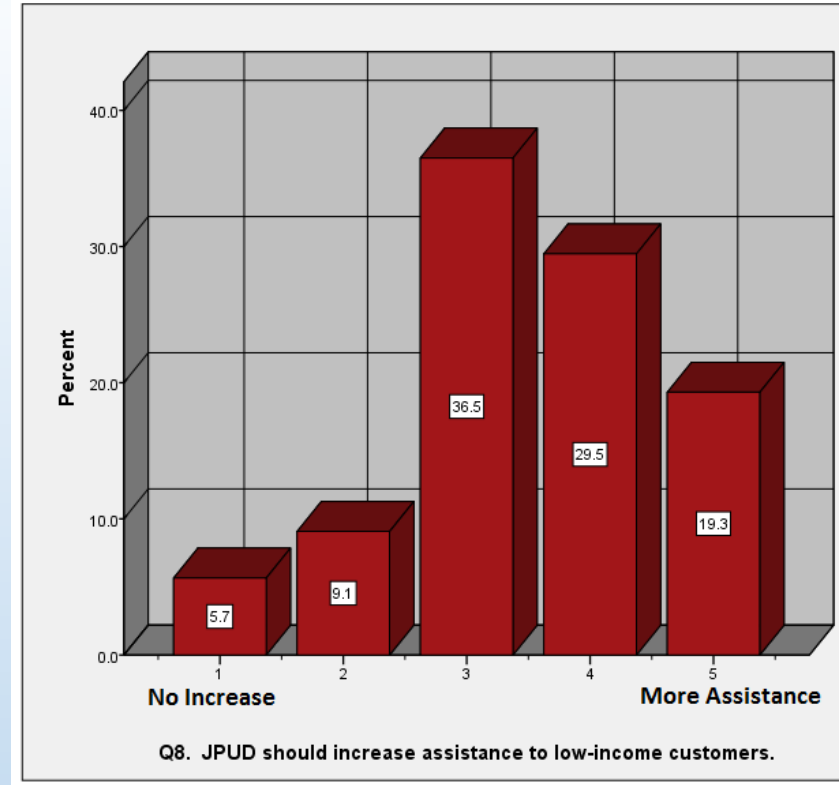
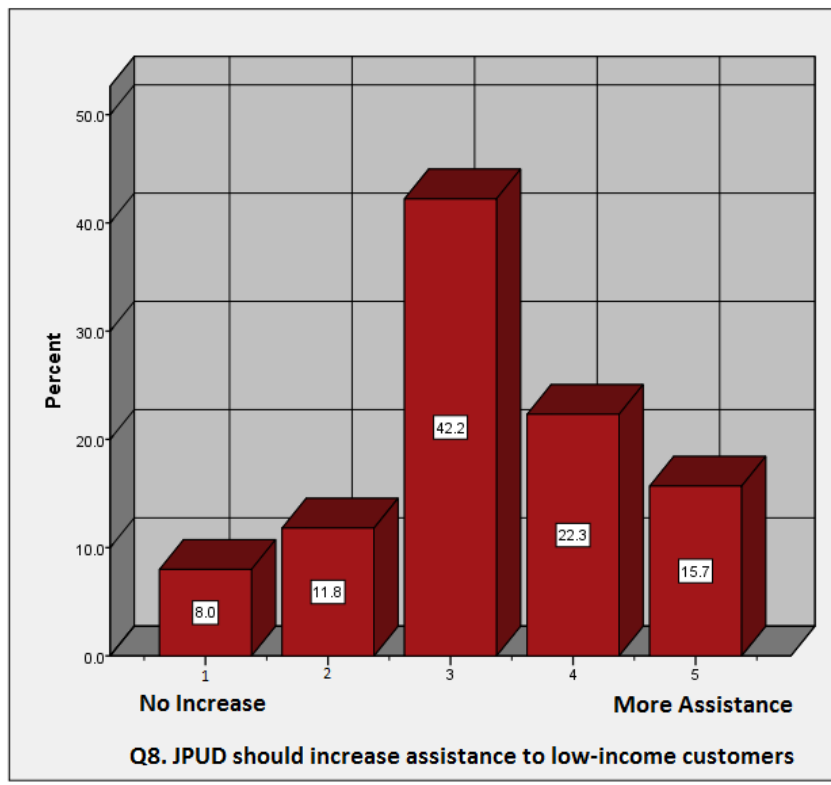


Q7. In general, JPUD management (JPUD Commissioners and management) is not doing a very good job. (V1)

In general, JPUD management (JPUD Commissioners and management) is doing a very good job. (V-2)

| | <u>Mgt. poor</u> | <u>Mgt. good</u> | |
|--------------------------|------------------|-------------------------|--------------------|
| See p. 22 (V-1) | 22.1 | 39.8 | $39.8/22.1 = 1.80$ |
| See p. 38 (V-2) | 20.8 | 35.7 | $35.7/20.8 = 1.72$ |
| Mean Ratio = <u>1.76</u> | | Neutral (Box 3) = 40.8% | |

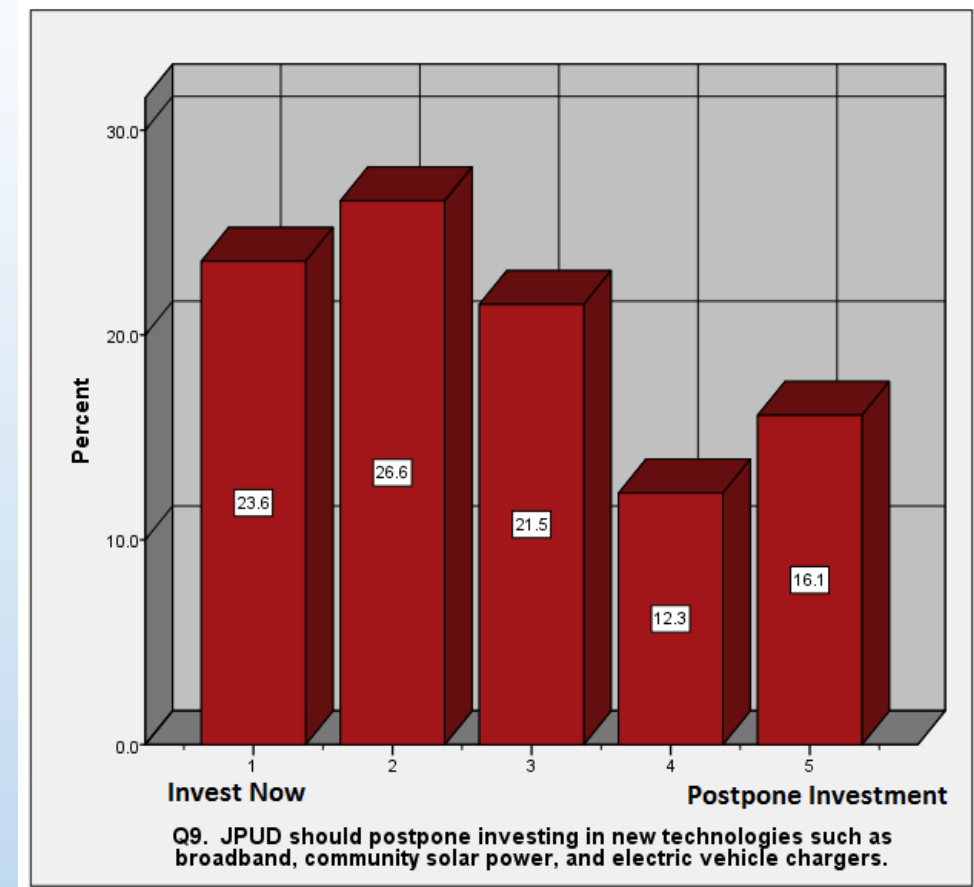
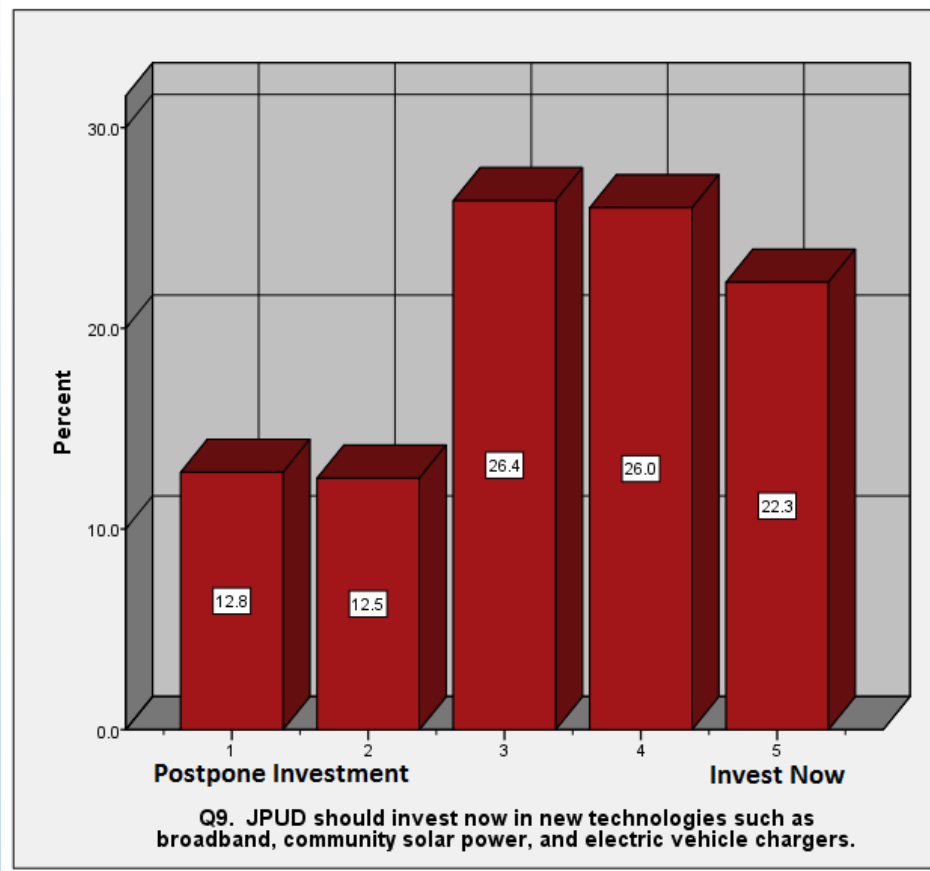
Summary finding: JPUD management was judged as doing a very good job by a ratio of about one and three fourths to one. This finding was about the same in both V-1 and V-2. About forty percent were neutral.



Q8. JPUD should increase assistance to low-income customers. (V-1 and V-2 were phrased the same)

| | <u>No increase</u> | <u>More assistance</u> | |
|--------------------------|--------------------|-------------------------|--------------------|
| See p. 23 (V-1) | 19.8 | 38.0 | $38.0/19.8 = 1.92$ |
| See p. 39 (V-2) | 14.8 | 48.8 | $48.8/14.8 = 3.30$ |
| Mean Ratio = <u>2.61</u> | | Neutral (Box 3) = 39.4% | |

Summary finding: Respondents voted 2.6 to 1 for increased assistance to low-income customers. About forty percent of respondents were neutral. Because this question was phrased only in the direction of increasing assistance, we do not know the amount of “agree bias” that may be affecting the results. In other words, we would likely have a different result had the question been phrased, “JPUD should not increase assistance to low-income customers.”



Q9. JPUD should invest now in new technologies such as broadband, community solar power, and electric vehicle chargers. (V-1)

JPUD should postpone investing in new technologies, such as broadband, community solar power, and electric vehicle chargers. (V-2)

| | <u>Postpone</u> | <u>Invest now</u> | |
|--------------------------|-------------------------|-------------------|--------------------|
| See p. 25 (V-1) | 25.3 | 48.3 | $48.3/25.3 = 1.91$ |
| See p. 42 (V-2) | 28.4 | 50.2 | $50.2/28.4 = 1.77$ |
| Mean Ratio = <u>1.84</u> | Neutral (Box 3) = 23.5% | | |

- **Summary finding: Respondents by nearly a two to one ratio favored investing now in new technology.**
- **The number of neutral respondents to this question was the lowest (23.5%) of any question in the survey. This was the case despite receiving many comments from respondents that the three technologies should not have been lumped together.**
- **Analysis (See below) of respondent comments about the three new technologies shows that Solar was the most popular by a wide margin. However, all but a few of these pro-solar respondents referred to residential solar power, rather than community solar power. Community Solar seems not to be a broadly familiar technology.**

Analysis of Respondent Comments on JPUD Survey

Objectives:

- **(1) Understand the “why” of the survey results.**
- **(2) Identify additional issues.**
- **(3) Get advice and priorities from customers.**
- **(4) Opportunity to complement and vent.**

- Analysis of the number of Respondents, (from SDS): See pp. 9 and 11.

| | | | | | |
|---|-------------|-----------------|-----------------|----------------|--------------|
| • | | <u>Positive</u> | <u>Negative</u> | <u>Neutral</u> | <u>Total</u> |
| • | Respondents | 351 | 649 | 662 | 1662 |
| • | Percent | 21.1 | 39.0 | 39.8 | 99.9 |

- Summary finding:

Almost half (48.2%) of the 3,448 total respondents wrote comments. The respondents who wrote comments were about twenty percent positive and about forty percent each negative and neutral.

- Analysis of the number of Comments relating to Questions 1-7, See, pp. 28-31, and 46-50. Comments were coded as positive or negative about JPUD, providing advice or stating priorities, and “not applicable”, e.g., new customer, or no opportunity to observe.

| | <u>Positive</u> | <u>Negative</u> | <u>Advice/Priorities</u> | <u>Not Applicable</u> | <u>Total</u> |
|----------|-----------------|-----------------|--------------------------|-----------------------|--------------|
| Comments | 737 | 1,813 | 279 | 106 | 2,935 |
| Percent | 25.1 | 61.8 | 9.5 | 3.6 | 100 |

- Summary finding:

Of the nearly three thousand comments, over six in ten were negative. In addition, most of the advice/priority comments had a negative tone. Yet less than forty percent of the respondents who wrote comments were negative. As expected, respondents who have negative feelings toward JPUD were more highly motivated to write comments. Those with positive feelings gave short comments, e.g., “good job” or “thanks for asking”. Those with negative feelings wrote multiple and lengthy comments. The average respondent wrote about 35 words of comment, but some negative respondents wrote hundreds of words, addressing a number of perceived problems with JPUD performance.

Analysis of comments by major Topic categories.

| <u>Rates</u>, See pp. 28 & 46. | <u>Negative comments</u> | <u>Positive comments</u> | <u>Total</u> |
|---|---------------------------------|---------------------------------|---------------------|
| Number | 264 | 29 | 293 |
| Percent | 90.1 | 9.9 | 100 |

Summary finding: Rates drew more comments than any other topic, except outages and service reliability. Comments about rates were overwhelmingly negative. The major perception was that they were too high and that they had increased. Some said rates had doubled or tripled since JPUD took over. Public perceptions that prices in general are rising are quite common. For instance, people commonly overestimate the rate of inflation as measured by actual consumer prices. Dissatisfaction with electricity rates may also be related to frustration with the billing system, a frequent comment topic. The survey asked about rates only in Question 4, where the importance of rates versus service was probed. Since rates (like taxes) are a common concern of many people, they were eager to complain. However, the data from Question 4 show that service reliability was seen by most respondents as more important than low rates.

- **2. Billing system:** See pp. 28 and 46.

| | <u>Negative comments</u> | <u>Positive comments</u> | <u>Total</u> |
|---------|--------------------------|--------------------------|--------------|
| Number | 219 | 33 | 252 |
| Percent | 86.9 | 13.1 | 100 |

- **Summary finding:** Respondents had a variety of frustrations with the billing system, which they found confusing and inconsistent. The vast majority of comments were negative. Many complaints were stated in the form of advice about how to improve it. Of course, these comments apply to the old billing system. Utility bills are inherently complex, and as more and more information is provided, may become even more complex. Customer feedback about the new billing system will be important. As was the case with rates, the survey did not have a question specific to the billing system.

- **3. Service reliability and outages:** See pp. 28-31 and 46-48.

| | <u>Negative comments</u> | <u>Positive comments</u> | <u>Total</u> |
|---------|--------------------------|--------------------------|--------------|
| Number | 221 | 437 | 658 |
| Percent | 33.6 | 66.4 | 100 |

- **Summary finding:** This set of topics was covered in Questions 3 and 4 on the survey. As a set they accounted for more comments than any other topic. In line with the survey responses to Question 3, two thirds of the comments were positive. However, outages were the most common subject of negative comments. They were perceived to be too frequent, they lasted too long, they were unjustified, and had many negative consequences. On the other hand, twice as many respondents had nothing but good things to say. Service was perceived to be better than with PSE, the hard work of the field crews was praised, service was getting better, and they were happy to be dealing with JPUD rather than PSE.

- **4. Customer service, response to problems, communication, and the phone system:** See pp. 29, 46-48.

| | <u>Negative comments</u> | <u>Positive comments</u> | <u>Total</u> |
|---------|--------------------------|--------------------------|--------------|
| Number | 318 | 60 | 378 |
| Percent | 84.1 | 15.9 | 100 |

- **Summary finding:** Questions 1 and 2 on the survey asked about customer service and response to customer problems. Question 6 asked about communication. However the communication referred to in customer comments was primarily in response to customer problems, rather than newsletters, the website and other active rather than reactive communication. Customer comments on these topics were mostly negative. This is not surprising since the survey asked about problems. Customers who have experienced problems are naturally unhappy. It is also useful to distinguish between the customer perceptions of electric service (which were mostly positive) and customer service/problem response (which were mostly negative). Finally, there were many complaints about the JPUD's telephone system, although many praised the courteous operators.

• **5. Management and Takeover from PSE: See pp. 28-30, 46 and 49.**

| | <u>Negative comments</u> | <u>Positive comments</u> | <u>Total</u> |
|---------|--------------------------|--------------------------|--------------|
| Number | 146 | 23 | 169 |
| Percent | 86.1 | 13.6 | 100 |

• **Summary finding:** Question 7 asked about management. The switch from PSE to JPUD was covered in Questions 1, 2, and 3. Respondent comments on these topics were low in number, but high in negative feelings. While the data from Question 7 give good marks to JPUD management by a ratio of nearly two to one, there were vitriolic comments from a majority of respondents who volunteered comments on this topic. About 80 respondents wrote comments about the campaign and subsequent takeover of electric service. All but a few were negative, yet the data from Questions 1, 2, and 3 trended modestly in the positive direction. That is, JPUD was preferred over PSE. Of course, JPUD management deserves some credit for the perception of improved electric service. This finding illustrates the usefulness of soliciting comments as a part of the survey process. While the survey data may show a majority of positive opinion on a given topic, respondents who feel strongly have a chance to weigh in with strongly negative opinions.

- 6. Assistance for low-income customers: See pp. 24, 40, and 41.

| | <u>Negative comments</u> | <u>Positive comments</u> | <u>Total</u> |
|---|--------------------------|--------------------------|--------------|
| • Number | 23 | 59 | 82 |
| • Percent | 28.0 | 72.0 | 100 |
| • Summary finding: Respondent comments on this topic were coded positive if they advocated increased assistance to low-income customers, as Question 8 on the survey asked, but also if they expressed empathy or general support for customers having trouble paying for electric service. Negative comments described increased assistance as a waste of money, not the responsibility of the PUD, or as encouraging the waste of electricity. The comments on this topic were few in number, but agreed well with the data from Question 8. Nearly three in four comments supported increased assistance for low-income customers. | | | |

- 7. New technologies: See pp. 26, 27, 43-45.

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| | <u>Invest now</u> | | <u>Postpone</u> | <u>Total</u> |
|------------------------|-------------------|----|-----------------|--------------|
| <u>Broadband</u> | Number | 33 | 10 | 43 |
| <u>Community solar</u> | Number | 25 | 7 | 32 |
| <u>EV chargers</u> | Number | 6 | 16 | 22 |

- **Summary finding:** Question 9 grouped the three technologies together and asked if investment now by JPUD or postponement was preferred. About two-thirds of respondents to Question 9 supported investment now, although there were many who said the three technologies should not be considered together. Only a few respondents commented on this topic, but they bring clarity to this issue. Comments on broadband were about two to one positive. Community solar drew similar support, but it is evident from the comment wording that many supporters were thinking of residential solar rather than community solar. There were also a number of customers with residential solar who expressed their unhappiness with JPUD for a variety of reasons. Electric vehicle chargers drew few positive comments. It was described as impractical for our area, or “only for the rich”. Question 9 presented the choice of investment now or postponement. Some respondents clearly felt JPUD should never invest in these new technologies, but should stick to its core business. Despite these difficulties in interpretation, comments were about two to one in favor of new technology investment, a similar result to that from Question 9.

- **Summary and Conclusions:** Four types of questions
- **1. Forced choice, Q4: Low rates versus service reliability.**
- **Service reliability strongly preferred, over the lowest possible rates, (2.97 to 1, or 75%)**
- **2. Comparison of JPUD and PSE, Q1-3: Customer service, response to customer problems, and electric service.**
- **Customer service: Slight JPUD win.**
- **Response to customer problems: Slight PSE win.**
- **Electric service: JPUD wins by a modest margin (1.38 to 1, or 58%)**
- **3. JPUD performance, Q5, 6, and 7: Community involvement, communication, and management.**
- **Community involvement: Weak OK, but more needed.**
- **Communication: More needed.**
- **Management: Pretty good endorsement (1.76 to 1, or 64%)**
- **4. Customer guidance, priorities, Q8 and 9: Assistance to low-income customers, and new technology.**
- **Low-income assistance: Strong support (2.61 to 1, or 72%)**
- **New technology investment: Modest approval of investment (1.84 to 1), but a mixed bag.**
- **Customer comments: The raw data speak loudly, but interpret with caution.**
- **The way ahead: More thought and discussion needed before we do version 2.0!**