

**ENVIRONMENTAL SERVICES
DEPARTMENT (ESD) AWARENESS, USAGE,
CUSTOMER SATISFACTION AND
PREFERENCES TRACKING TELEPHONE SURVEY**
Conducted September, 2012

Work in Progress

Prepared for
ENVIRONMENTAL SERVICES DEPARTMENT (ESD)
City of Tucson

Prepared by
FMR Associates, Inc., Tucson, Arizona
In conjunction with
Kaneen Advertising & PR, Inc., Tucson, Arizona

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(September, 2012)

**Introduction
and Goals**

This Awareness, Usage, Customer Satisfaction and Preferences Telephone Survey, conducted for the City of Tucson's Environmental Services Department (ESD), was designed to track residential customer awareness, usage and satisfaction with ESD services. Kaneen Advertising & Public Relations, Inc. assisted in the planning and preparation of the survey. Where possible and relevant, the results of this study are compared to the Residential Customer Survey conducted for ESD by FMR Associates in March 2011.

Areas of Investigation – The following areas of investigation were considered the central points for this Awareness, Usage, Customer Satisfaction and Preferences Tracking Telephone Survey:

1. **Overall ESD Evaluations** – What is the overall rating of ESD, as well as key programs and services? How have these evaluations changed since last year?
2. **Customer Service Evaluations** – Have customers interacted with ESD employees or contacted ESD by telephone? How do customers rate the service received?
3. **Blue Barrel Recycling Evaluations** – Do customers use the Blue Barrel recycling service? What other types of materials would customers like to recycle? What could ESD do to increase recycling? How do customers typically dispose of plastic grocery/retail bags? Is there support for an education program to increase recycling of these bags? Do customers support a ban on bags or being charged a small fee by retailers to reduce bag use?
4. **Brush & Bulky Program Evaluations** – What is the tracking of the awareness, usage and rating of regular and fee-based special Brush & Bulky pick-up

services? Have Brush & Bulky users utilized “other” services to haul items? Do fee-based special Brush & Bulky program users think the service is a good value?

5. **Household Hazardous Waste Program Evaluations** – What is the tracking of the awareness of the Household Hazardous Waste Program? Among users, which drop-off sites have been utilized? What is the willingness to pay for scheduled pick-up of household hazardous waste? How has willingness to pay changed since last year?
6. **Potential Yard Waste Recycling Program Evaluations** – What is the current or potential usage of mulch for landscaping? What is in interest in yard waste collection/ recycling programs, including a separate green barrel (and what is the willingness to pay for this service)?
7. **ESD Customer Communication Evaluations** – Are current methods to communicate pick-up schedule changes sufficient? If not, what would work better? Are door hangers sufficient to notify residential customers of regular Brush & Bulky pick-up service? If not, what is suggested to enhance or replace them? What communication sources do residential customers use to get information about ESD services, and how have usage patterns changed since last year? What do customers say is the best way to communicate with them? Do residential customers use the ESD website? If so, what do they use the website for? Are residential customers willing to sign up for information e-mails from ESD?
8. **Suggestions and Recommendations for ESD** – What other services should ESD offer its customers? What suggestions or comments do residential customers offer concerning ESD?

Methodology Overview – To accomplish the goals of this study, a random sampling of ESD residential customers (heads of household age 18 or older) was interviewed by

telephone during early September 2012. All customers were contacted from an ESD-supplied database. Surveys were conducted in English or Spanish, as preferred by the respondent. The specific procedures used to select the sample, as well as the descriptions of the demographic composition of the survey respondents, are explained in detail in the Appendix.

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Executive Summary

Final In-Tab Survey Sample and Tracking – This tracking telephone survey project is comprised of 403 interviews conducted among ESD customers randomly-selected from a client-supplied database. All telephone interviews were conducted with heads of households age 18 or older. Surveys were distributed among the City’s six wards. A Spanish-language version of the final questionnaire design was prepared and made available to survey respondents who requested it. Where possible and relevant, data from this project is tracked and compared with the Awareness, Usage, Customers Satisfaction and Preferences Phone Study conducted by FMR Associates for ESD in March 2011.

ESD Customer Profile – The final in-tab sample for this tracking survey skews female (59%), and includes the following age distributions: 25%, 18 to 34; 21%, 35 to 44; 20%, 45 to 54; 14%, 55 to 64; and 17%, 65+. Median age (excluding refusals) is 46.5 years. Seven of ten own their current home (71%), and the balance (29%) rent. The sample is nearly evenly divided between customers who have lived at their current address for less than two years (32%), 3-to-10 years (32%) and more than ten years (33%). Median annual household income (excluding 13% who refused to disclose their income category) is \$44,539.

Sample Comparisons – While both studies lean female (59%-60%), the 2012 sample is “younger” than the 2011 sample (46.5 versus 55.5 years median age, respectively). In part related to the younger sample, there are more renters (from 12% to 29%), median income is lower (from \$52,673 to \$44,539) and there are more “new” residents (for less than two years) at their current address.

Overall Rating of ESD – Highly consistent with the 2011 study, 83% of customers in the current survey indicate that ESD does an “excellent” (41%) or “good” (42%) job overall. Similarly, 12% evaluate ESD as “fair” overall – while just 5% of customers are negative to any degree. This represents a 4.2 average score on the “1-to-5” job rating scale, unchanged since last year. Significantly, average ratings are consistently high regardless of customer sub-group.

Rating of ESD Services and Programs – One-half or more of customers believe that ESD does an “excellent” job providing these individual services or programs:

- **Twice a year Brush & Bulky collection** (58% “excellent job” [up from 49% last year], 22% “good” versus 8% negative evaluation [to any degree] – for a 4.3 average score on the “1-to-5” scale [up slightly from 4.2 last year].)
- **Recyclables collection in the Blue Barrel** (53% “excellent job,” 32% “good” versus 4% negative evaluation – for a 4.3 average score [unchanged since last year].)
- **Trash collection** (47% “excellent job,” 34% “good” versus 6% negative evaluation – for a 4.2 average score [down slightly from 4.3 last year]. Compared to last year, slightly fewer indicate an “excellent” rating [from 52% to 47%].)

New to the current survey, a slight majority of ESD customers have no opinion with respect to **landfill services** (52%). Among those who do, two-thirds offer a positive evaluation – with 39% who indicate an “excellent job.” Just 6% are negative to any degree, for a 4.0 average score.

Similar to last year, the majority have no opinion when it comes to the **Household Hazardous Waste Program** (60%). However, among those who do, the average evaluation has increased slightly (from 3.7 to 3.8) – based on 60% positive versus 16% negative ratings. The percentage of “excellent job” scores has increased from 35% to 38%.

ESD Employee Interaction Evaluations – Nearly three of ten customers (28%) indicate that they have had interactions with ESD employees. These tend to be homeowners (30% versus 23% of renters) and Brush & Bulky users (30%).

Among these customers who have been in contact with ESD employees (and allowing for multiple responses), two-thirds have interacted with a **customer service or billing representative**. This is particularly true among progressively newer residents in their current home. Another 35% say they have interacted with a **driver** – more often progressively longer term residents at their current address.

How do customers rate their interactions with ESD employees? A majority (56%) rate their most recent customer service interaction as “excellent.” Another 22% offer a “good job” evaluation, while 13% are negative to some degree – resulting in a 4.1 average score on the “1-to-5” scale.

ESD Telephone Customer Service Evaluations – Four of ten have contacted ESD by telephone (41%). These tend to be more progressively long-term residents in their current home, as well as homeowners (42% versus 36% of renters). Among those who have contacted ESD by phone, three of four (76%) rate their telephone customer service as “excellent” (50%) or “good” (26%). Just 15% indicate a negative evaluation, resulting in a 4.0 average score overall (on the “1-to-5” scale). Positive telephone customer service evaluations are directly related to overall satisfaction ratings with ESD and inversely related to length of residence at current address.

Blue Barrel Program/Recycling Evaluations – Fully 94% of ESD customers surveyed use the Blue Barrel recycling service. This includes an even larger share of homeowners (96% versus 88% of renters) and current Brush & Bulky program users (97% versus 82% of non-users).

What additional materials would Blue Barrel customers like to recycle (but believe are not currently allowed)? Two-thirds offer no response. Among those who do, the most often identified materials include:

- ✓ **Plastic bags/Plastic shopping bags** (12%)
- ✓ **Styrofoam** (8%)
- ✓ **More plastics/Other number plastics** (4%)
- ✓ **Glass** (2%)
- ✓ **Cardboard/Boxes** (2%)

Blue Barrel users indicate that ESD could implement the following to increase the amount they personally recycle:

- ✓ **More recycling bins in public** (43%)
- ✓ **Increase education programs** (36%)

Fewer recommend that ESD make **changes to curbside service** (8%). Overall, 27% of Blue Barrel users say “nothing” (or none of these options) would increase the amount they recycle (18%) or are unsure (9%).

Plastic Grocery/Retail Bag Disposal – After being informed that plastic grocery/retail bags are not biodegradable and create a significant amount of waste in the community, seven of ten ESD customers (71%) indicate that they use the plastic bags they get from grocery and retail stores for “other purposes.” Re-use of plastic grocery/retail bags is generally consistent regardless of demographic sub-group, and highest among the youngest customers (18 to 34).

Among the rest, and allowing for multiple answers, one-third **recycle their plastic bags at retailers or grocery stores** – most often the most long-term (11+ years) residents at their current address. Another 8% **place their plastic grocery/retail bags in the Blue Barrel**. Overall, 18% indicate they typically **throw away** their plastic grocery/retail bags.

Plastic Bag Recycling Educational Program Support – More than eight of ten ESD customers (84%) would support an educational program to increase recycling of plastic bags. Support for such a program is generally consistent across-the-board, and greatest among women and 18 to 34 or 45 to 54 year-olds. Among the rest, 11% would not support an educational program.

Support for a Ban on Plastic Bags – The majority (54%) of ESD customers do not support a ban on plastic bags (42%) or are not sure (12%). The remaining 46% would support such a ban. Support for a ban is elevated among women (51% versus 39% of men) and progressively newer current address residents and renters (50% versus 44% of homeowners). Men and older customers are more likely to be unsupportive of a ban on plastic bags.

Support for Retailer Fee to Reduce Plastic Bag Use – A slight majority (51%) do not support a small fee charged by retailers to reduce plastic bag use. Another 9% are not sure. Four of ten support the retailer fee – more often renters (48% versus 37% of homeowners), 18 to 44 year-olds (50%) and progressively newer residents. On the other hand, most men (56%), 11+ year residents (58%) and customers 45 or older (especially those 65+) do not support the fee.

Brush & Bulky Program Evaluations – Up from three of four in the 2011 study, 79% of ESD customers in the current survey indicate that they use the twice a year scheduled Brush & Bulky service.

Another 18% indicate they do not use the scheduled Brush & Bulky service (down from 23% last year). These non-users tend to be renters (30%), lower income (under \$25,000) households (34%) and the newest residents at their current address (for two years or less) (29%). For what reasons? As we found last year, these non-users most often say they “don’t need the service” and/or “don’t have any brush and bulky to pick up.” More generally, some indicate they “don’t produce some trash.” Others claim the service is not available or not needed in their current location. Some “haven’t lived here long enough to have service.” Several (typically renters and new residents [two years or less] at their current address) offer no specific reason for not using the Brush & Bulky pick-up service.

Seven of ten Brush & Bulky customers utilize the service twice per year. This is down from 76% last year. Instead, a few more are single-use Brush & Bulky customers (from 18% to 26%) – while few (3%, unchanged since last year) use the service 3+ times per year.

More than eight of ten Brush & Bulky users (82%) do not use any other hauling services besides the twice year scheduled Brush & Bulky service.

Brush & Bulky Service Rating – As we found last year, Brush & Bulky program users are very positive about their service. Identical to last year, 62% of users rate the Brush & Bulky program as “excellent” – while 22% consider it “good.” Only 4% are negative to any degree. This results in 4.4 average score on the “1-to-5” rating scale, unchanged since the 2011 survey. “Excellent” scores are higher among homeowners (64%) than renters (56%), and directly related to overall ESD satisfaction. On average, ratings are consistently positive regardless of demographic sub-group.

What suggestions do users offer to improve their Brush & Bulky service? Among the 51% of Brush & Bulky users who offer a specific suggestion, the clear recommendation to improve the twice a year scheduled Brush & Bulky service is to increase the frequency of pick-ups. Specifically, 27% suggest that “more than twice a year would be good” (20%) and/or recommend “three times a year” (7%). A few also suggest “quarterly” service (2%).

Special Brush & Bulky Pick-Up Service Evaluations – Highly consistent with last year, 37% of ESD customers say they are aware a fee-based special Brush & Bulky service. Awareness is consistent among homeowners (36%) and renters (37%), and higher among long-term (11+ years) current address residents.

Among the 37% of customers aware of the special Brush & Bulky service, 15% report using the service. These tend to be lower income households. Among the total sample, this represents 5.4% overall usage of the special Brush & Bulky service (up from 4.2% overall usage in the 2011 study).

Special Brush & Bulky Pick-Up Service Rating – While the vast majority of past-users of the special Bulk & Brushy pick-up continue to indicate a positive (a good [“4”] or excellent [“5”]) rating of the service (78% versus 88% in 2011), fewer indicate a “excellent” score (46%, down from 76%). Most of the rest (18%) indicate a “fair” rating. And only 4% (one user) in the current study offers a negative evaluation – resulting in a 4.2 average score on the “1-to-5” scale (down from 4.6 last year).

Among the 22 special Brush & Bulky service users in the current study, 14 (or 64%) feel it was a good value for the cost. This is down from 94% (16 of 17) last year. Instead, the remaining 37% of past-users in the current study say it was not a good value (23%) or are unsure (14%).

Household Hazardous Waste Program Awareness and Usage – Down from 61% last year, 51% of customers in the current survey say that they are familiar with the Household Hazardous Waste Program. Awareness is elevated among the most long-term (11+ year) current address residents and the oldest customers (65+). Familiarity is marginally higher among homeowners (53%) as compared to renters (47%). Those unfamiliar (47% overall) tend to be the youngest customers (18 to 34).

Customers familiar with the Household Hazardous Waste Program have utilized the following drop off locations:

- ✓ **Los Reales Landfill** (22% usage, up slightly from 21% last year.)
- ✓ **Sweetwater Facility** (19% usage, down slightly from 22% last year.)
- ✓ **A monthly collection event** (16%, down from 26% last year.)

Household Hazardous Waste Scheduled Pick-Up Fee Elasticity of Support – Among residential customers, 62% are willing to pay a \$10 fee for a scheduled pick-up of household hazardous waste at their home. Nearly one-half (46%) are willing to pay \$15. These findings suggest a fee level of \$10 (to slightly higher) for scheduled at home pick-up of hazardous waste.

How do these findings compare to last year? Overall, they reflect an increase in the willingness to pay \$15 or \$10 for at home service. And this is the case regardless of length of residence at current address.

Potential Yard Waste Recycling Program Evaluations – Nearly four of ten residential ESD customers (38%) indicate they are interested in using (or currently use) mulch for landscaping. Mulch users tend to be 35 to 44 year-olds, renters (42% versus 36% of homeowners) and progressively newer residents at their current address.

Current/Potential mulch users (38% of the total sample) indicate significant interest in the two programs evaluated, including:

- ✓ **A separate green barrel to be collected by Environmental Services** (74% interest.)
- ✓ **A service to chip your site's green waste into mulch** (64% interest.)

Green Barrel Yard Waste Collection Service Fee Elasticity of Support – Among current/potential mulch users interested in a separate green barrel yard waste collection service (28% of all customers), 59% indicate that they would be willing to pay \$7.50 per month for the service. If the fee is \$10 per month, 47% are willing to pay.

Pick-Up Schedule Changes Preferences – Among the total sample, 72% say that the current methods of notification of pick-up schedule changes (through local news media [TV, radio, newspaper] and the web [website, social media]) are sufficient. Customers who think current methods of notification are not sufficient (22% overall) tend to be the newest residents (for two years or less) at their current address.

Among those customers not satisfied with the current means of notification for pick-up schedule changes, four of ten customers offer no specific recommendation for improvement. Among the rest, two of ten suggest “something in the mailbox” (“mail a card,” “direct mail”) (21%). Others would like notification in utility bills (“an insert in my bill,” “put in the water bill”) (14%) or say “email would work better” (13%). A few suggest “door hangers” (7%).

Sufficiency of Door Hanger Notification – Among the total sample, and identical to last year, more than nine of ten say that the door hanger is sufficient notice of the Brush & Bulky service (93%). Just 6% say it is not sufficient notice.

ESD Communication Recall and Preferences – When asked how they get information about Environmental Services, three of four mention **door hangers** (77%, down slightly from 82% in 2011) and six of ten have received **inserts in their bills** (60%, down from 67%). One-third mention seeing ESD information in **news stories on television** (34%, up from 25%), while slightly fewer have seen information in **news stories in the newspaper** (27%, down from 33%) or **brochures/pamphlets** (unchanged at 25%). About two of ten have seen information on the ESD on a **website** (22%, up from 14%) or heard it on the **radio** (21%, up from 10%).

In terms of the *best* way to provide information about ESD, **door hangers** remain the most preferred (40%, up slightly from 38% in 2011), followed by **inserts in water bills or utility statements** (30%, down from 34%). Less than one of ten overall most prefer **websites** (7%, down marginally from 8%), **television** (6%, up from 4%) or **newspapers** (unchanged at 6%).

Potential of Following ESD on Facebook – One of four customers (24%) would “follow Environmental Services on Facebook to learn about service

schedules, Brush & Bulky pick-up or other general information.” These are more apt to be renters, women and customers under 45.

ESD Website Usage – Similar to last year, one of four residential customers say they have used the ESD website (24%). Customers 18 to 34 and those who earn between \$50,000 and \$99,999 annually are more apt to use the ESD website.

For what reasons is the ESD website used by customers?

- ✓ **Find dates for Brush & Bulky pick-up or trash collection** (72%, down only slightly from 74% in 2011).
- ✓ **Find out recycling information** (53%)
- ✓ **Find Household Hazardous Waste or landfill information** (43%).
- ✓ **Order or replace containers** (37%, up from 26%)
- ✓ **Fill out service requests** (24%, up from 22%).

Potential Sign-Up for ESD Informational E-Mails – When all residential customers were asked if they would sign up for a service to receive informational e-mails from Environmental Services, more than four of ten say they would (43%, up from 38% in 2011).

Recommendations for Additional Services – When asked what other types of services the ESD should offer, more than eight of ten customers have no recommendation (83%). Among the rest, no one suggested service stands out. A few mention other types of items for pick-up, such as “old electronics,” “collecting plastic grocery bags,” “medicine pick-up” and/or “car batteries.” Others generally mention more pick-ups or drop-offs of household hazardous waste. Some specifically would like more “green” recycling, including “organic waste, compost” and/or “separate trash for weeds, grass.” A few would like “new trash cans” or “more containers to be able to recycle,” as well as “more education on what to recycle.”

Additional Suggestions, Recommendations or Comments for ESD – Eight of ten customers have no specific suggestions for ESD (81%, up from 51%). A few continue to say that ESD is “doing a pretty good job” (3%, down from 9%). Among the rest, a wide variety of suggestions are made. Several want “more education in schools regarding recycling” or information on all services. A few mention expansion or emphasis on specific services, including “something needs to be done to expand the hazardous waste pick-ups” or “a little more attention to the Brush & Bulky program.” A few think the service is “too costly.”

Some specifically complain about service related to the drivers, including timeliness of pick-up, trash spillage and/or knocking over cans. A few generally suggest “more professional customer service.”