

NARRATIVE
RESEARCH

2020 Quality of Service Study

Final Report Prepared for:

Halifax Water



**STRAIGHT from
the SOURCE**

December 2020

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Introduction

Narrative Research is pleased to present Halifax Water with the results of the **2020 Quality of Service Study**. Halifax Water commissioned questions on the Fourth Quarter 2020 *Halifax Urban Report*. The purpose of this research was to examine customers' perceptions of the services provided by Halifax Water, as well as to examine broader issues around water quality and service delivery. However, questions were not posed this year, like previous years, on the Halifax component of the *Atlantic Quarterly*® vehicle offered by Narrative Research. This transition was undertaken as there was an opportunity to reduce the research fees of Halifax Water, while still providing high quality research.

The total sample size for questions asked on the *Halifax Urban Report* is 400. A sample of 400 residents can be expected to yield an overall margin of sampling error of ± 4.9 percentage points in 95 out of 100 samples. Of these 400 residents, 303 receive their household water from Halifax Water. A sample of 303 Halifax Water customers can be expected to yield an overall margin of sampling error of ± 5.7 percentage points in 95 out of 100 samples.

A copy of the questionnaire is appended (Appendix A), as well as comprehensive banner tables (Appendix B) that present the results for each question by key demographic subgroups. The tables are noted by number throughout the report for easy reference. Unless otherwise stated, all results in this report are expressed as a percentage.

Executive Summary

Overall, results for the **2020 Quality of Service Study** indicate that satisfaction with Halifax Water's *overall service delivery* remains strong with almost all (96%) customers satisfied, consistent with previous years. Likewise, satisfaction with Halifax Water's *products and services* also remains high, with most (92%) customers satisfied.

As well, residents continue to rate Halifax Water's performance highly across a multitude of categories. For example, most Halifax Water customers believe that their water is safe and of high quality, a finding that is consistent with the 2019 survey results.

In terms of specific aspects of the service that Halifax Water provides, ratings for *overall delivery of service* remain high and consistent compared with last year's results. Ratings for key service indicators such as *staff accessibility*, *staff promptness*, *ability to answer questions*, and *politeness* also remain high. In calculating selected results this year, only respondents who *have had a service interaction with Halifax Water* were included. An increase in the satisfaction level of most of these measures is evident, along with a decline in the number of "don't know" responses. However, it is worth mentioning that while satisfaction with various service metrics is more widespread than in 2019, this satisfaction is 'less intense' in certain instances in 2020 in that the proportion of very satisfied customers has diminished in this year's survey.



In addition, Halifax Water's Customer Service Index was updated this year as a new service-focused question was added, and a new volunteered response code was included in the Index questions to enhance the targeting of customers who have had a service interaction with the organization. Thus, the new Customer Service index is less comparable to previous indices and has not been compared with previous indices in this report. The 2020 CSI provides an overall assessment of performance based on customers' ratings across seven service areas.

Confidence in the safety of water for recreation in the Halifax Harbour is moderate, consistent with results observed over the past two years. Specifically, 48 percent of residents are confident that the water quality in Halifax Harbour is safe for recreational use, while a similar proportion of residents are not.

Residents continue to lack awareness of the primary source of their municipal tap water. One in six customers identified Pockwock Lake as the primary source of their tap water, and one in ten residents mentioned Lake Major, consistent with the previous year's results. Consistent with the last year's results, four in ten residents report using a water filter or other home water treatment device. *Concerns about water quality, removal of chemicals from tap water and improved taste* are the top three reasons why residents use a water filter or other home treatment devices.

One-half of residents reported receiving stormwater service from Halifax Water. Meanwhile, one in five residents were not sure in this regard. Among those who receive stormwater service from Halifax Water, the vast majority are satisfied with the service. New this year, residents were asked if they receive wastewater service from Halifax Water. Just over one-half of residents confirmed they receive wastewater service from Halifax Water, while one in six residents were not sure in this regard. Among those who receive this service, nine in ten are satisfied. Such residents were also asked if they knew which water body receives the treated wastewater from their property. Awareness in this regard is modest, with one-half of residents being unable to provide a definite response. One-third of residents mentioned Halifax Harbour, while eight percent of residents mentioned Bedford Basin.

For the fourth year in a row, a large majority of customers remain unaware of Halifax Water's subsidy program to assist residential customers with replacing their lead water service lines that connect the water main in the street to a customer's home. Awareness of the program is consistent with last year's results with two in ten residents being aware of the program. Among residents with homes constructed prior to the 1960s, seven in ten residents indicate interest in using the subsidy program within the next few years (compared to one-half of residents in 2019). Interest in this regard has increased notably.

The Internet continues to be the preferred method by a large margin across regions and demographic subgroups, in terms of accessing information related to Halifax Water's stormwater, wastewater and water programs.



Awareness of Halifax Water's emergency financial assistance program to help low income customers remains low. One in seven residents are aware of this program, consistent with last year's results.

New this year, Halifax area residents were asked if they had seen or heard any information related to Halifax Water's Customer Portal. Nine in ten residents are unaware of the customer portal, while a modest proportion of six percent of residents are aware. Residents were also asked what according to them would be the main benefit of using the customer portal for their household. No single benefit was identified by more than one in six residents. Benefits such as convenience, managing account information, checking water consumption, and staying updated were identified. Halifax Water customers with Internet access were asked if they would be interested in managing their account online through the customer portal. Seven in ten such customers said they were either *very* or *somewhat* interested. Among these customers, there is a high level of interest in using the customer portal for all three services – managing account online, monitoring water consumption, and paying bills online.

A series of new questions were asked this year regarding service interaction of Halifax area residents with Halifax Water in light of the current pandemic. Residents have had very limited service interaction with Halifax Water since the beginning of the pandemic period in mid March this year. One in ten or fewer residents have interacted via mail or fax, telephone, online, or in-person. The vast majority of Halifax area residents who had a service interaction with Halifax Water during the pandemic, rate the overall service provided by Halifax Water as *about the same* as the service provided by Halifax Water prior to the pandemic. Six percent of such residents said the service provided during the pandemic was *better* than that provided prior to the pandemic, while two percent mentioned it was *worse*.

Seven in ten Halifax area residents think it is not very or not at all important to be able to visit Halifax Water's office and speak with a representative in-person. Two in ten residents think visiting the office to speak to a representative in-person is important to them, but not critical. Meanwhile, five percent of residents feel it is critically important for them to be able to visit Halifax Water's office.

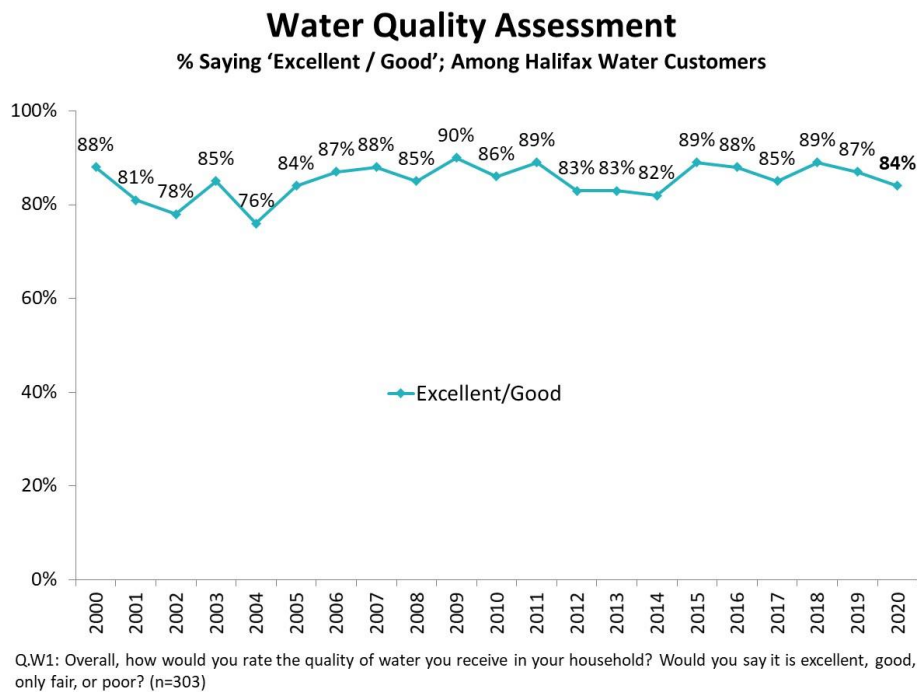
In conclusion, it is important to underscore Halifax Water's very strong performance on two key quality of service indicators mentioned above, as these metrics serve to distil an important overall customer disposition towards the organization. Specifically, satisfaction with Halifax Water's *overall service delivery* and satisfaction with Halifax Water's *products and services* both remain high, with over nine in ten customers expressing satisfaction with both measures.



Detailed Analysis

Water Issues

The proportion of Halifax Water customers who rate the quality of water they receive as *excellent* or *good* is fairly consistent with the results observed last year, and indeed this finding is consistent with the survey result obtained regularly over the years by Halifax Water. Over eight in ten residents (84% compared to 87% in 2019) offer a favourable assessment of the quality of water received from Halifax Water. (Table W1)

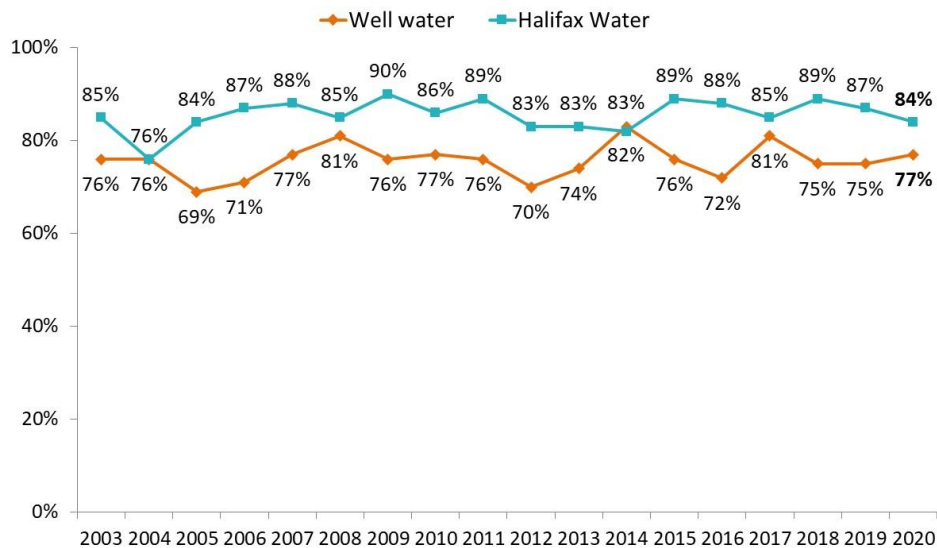


Among HRM residents, ratings of water quality are consistent regionally. Perceptions of the water quality as only fair or poor are more likely among residents aged 35 to 54 years, as well as among those with a household income less than \$100,000.

Halifax Water customers (84%) are modestly more likely than those with a well (77%) to rate the quality of their water as *excellent* or *good*. The proportion of residents with a well who rate their water as excellent or good is consistent with last year's results.



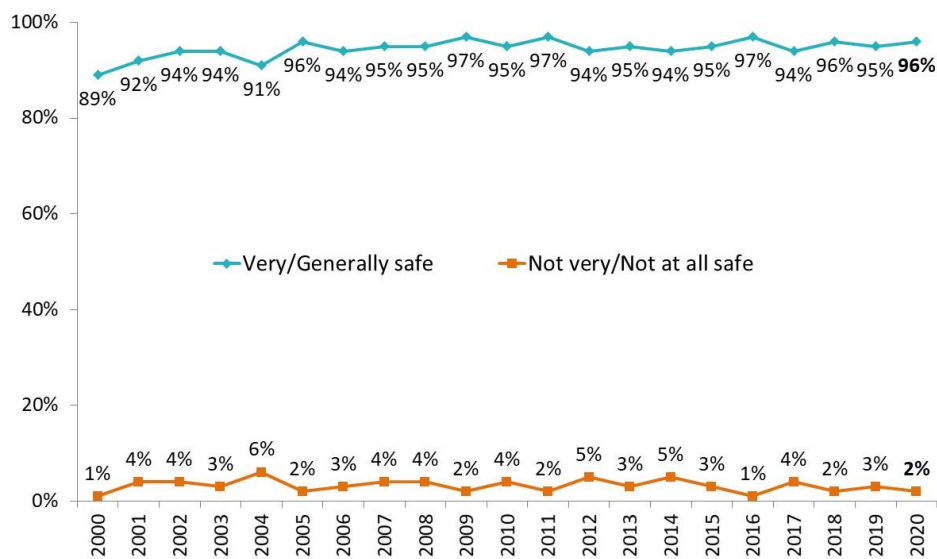
Water Quality Assessment Excellent/Good



Q.W1: Overall, how would you rate the quality of water you receive in your household? Would you say it is excellent, good, only fair, or poor? (Halifax Water n=303, Well n=88) *Note: In 2008, HRWC became Halifax Water.*

Nearly all Halifax Water customers perceive their water as *very* or *generally safe*, while very few rate their water as *not very* or *not at all safe*, similar to previous years. Among HRM residents, there is little difference in perceptions of water safety regionally or across most demographic subgroups, as nine in ten or more provide ratings of *very* or *generally safe* across each audience. (Table W2)

Water Safety Assessment Among Halifax Water Customers



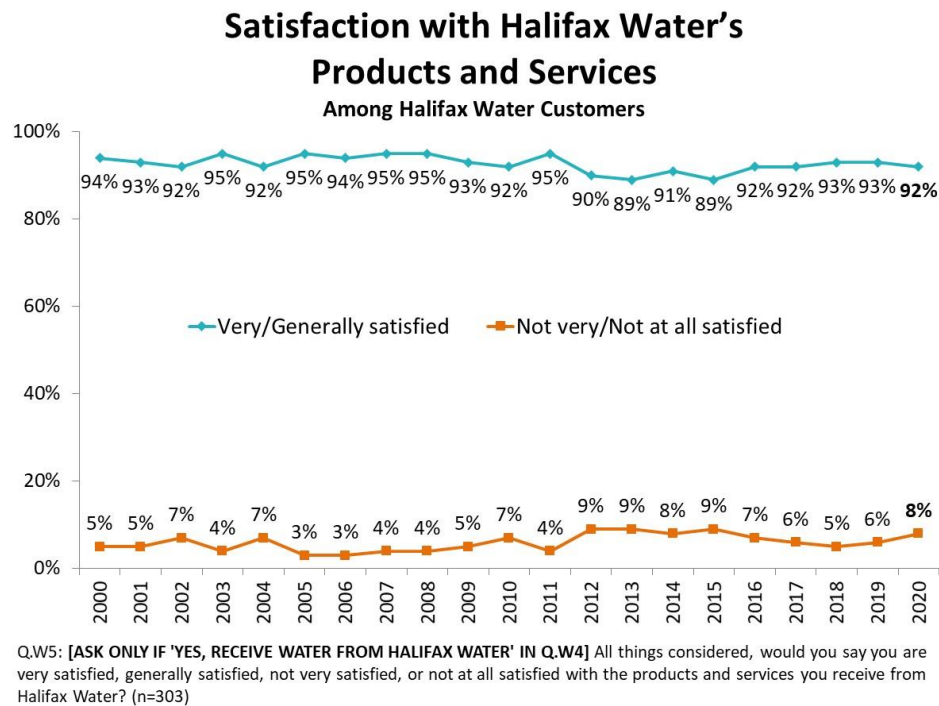
Q.W2: Overall, how safe would you say your water is? Would you say it is very safe, generally safe, not very safe, or not at all safe? (n=303)



Among the tiny number of Halifax Water customers who believe their water is unsafe (n=7), concerns regarding *addition of unhealthy chemicals, bad taste, odour, and old pipes* were mentioned. (Table W3)

Customer Satisfaction

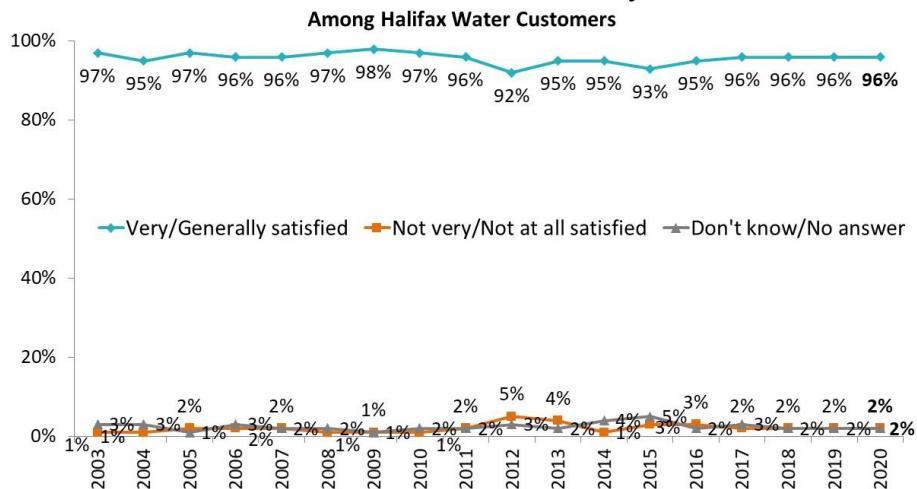
The vast majority of customers are satisfied with the products and services they receive from Halifax Water. Just over nine in ten (92%) customers report being *very or generally satisfied* with the products and services received from Halifax Water, stable with last year's results. Ratings of satisfaction are high across the regions and demographic subgroups. (Table W5)



Satisfaction with Halifax Water's **overall delivery of service** remains widespread and is stable compared with previous findings. Specifically, 96 percent of residents offer a rating of *very or generally satisfied*, consistent with previous years. Satisfaction in this regard is widespread regionally and across the population. (Table W6a)



Satisfaction with Halifax Water's Overall Service Delivery



Q.W6a: [ASK ONLY IF 'YES, RECEIVE WATER FROM HALIFAX WATER' IN Q.W4] For each of the following, please tell me whether you are very satisfied, generally satisfied, not very satisfied, or not at all satisfied with the service you have received from Halifax Water: Overall service delivery – How well Halifax Water delivers its services to you? (n=298)
 Note: The 2020 responses for 'Have not used this Halifax Water service' and 'Have not had any service interaction with Halifax Water Staff' have been removed from this table.

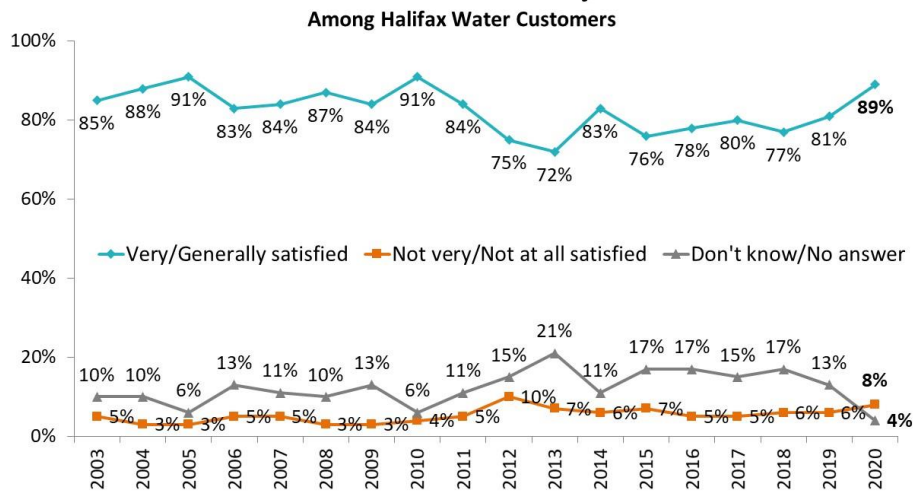
There is a high level of satisfaction among customers who have had a service interaction with Halifax Water staff, in terms of **accessibility** of staff. Nine in ten such customers (89%) are *very* or *generally satisfied* with the accessibility of Halifax Water staff, while one in twelve such customers (8%) are *dissatisfied*. Male customers express a higher level of dissatisfaction with staff accessibility compared to female customers (13% males versus 2% females). (Table W6b)

Satisfaction with accessibility of Halifax Water has increased by eight percentage points, while the proportion of *don't know* or *no answer* responses has declined by nine percentage points.

Of note, a new code was added this year to capture volunteered responses of customers who had not had a service interaction with Halifax Water Staff. Responses for this code have been removed from the table graphed below. Thus, caution is advised while comparing the year-over-year results with respect to 2020 results, as this tabulation revision no doubt has played a role in the upswing in satisfaction with staff accessibility recorded for 2020 in the graphic below.



Satisfaction with Halifax Water's Staff Accessibility



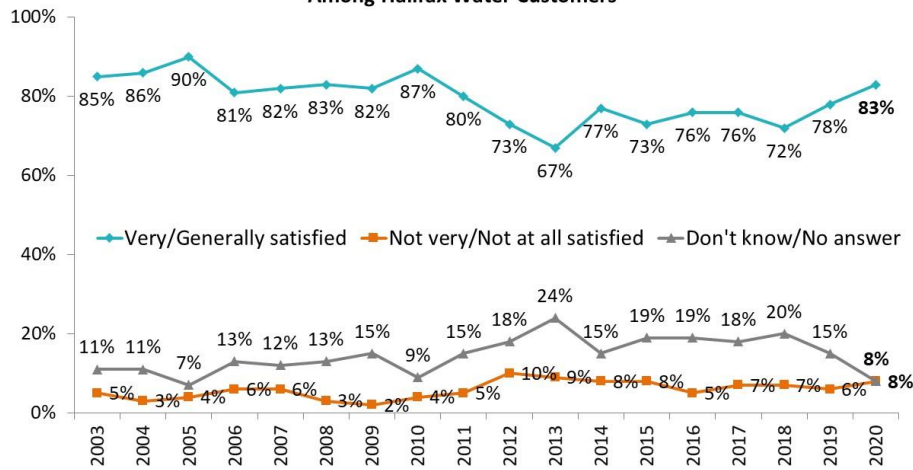
Q.W6b: [ASK ONLY IF 'YES, RECEIVE WATER FROM HALIFAX WATER' IN Q.W4] For each of the following, please tell me whether you are very satisfied, generally satisfied, not very satisfied, or not at all satisfied with the service you have received from Halifax Water: Accessibility – How easy it was to reach Halifax Water staff when you needed to? (n=202)
 Note: The 2020 responses for 'Have not used this Halifax Water service' and 'Have not had any service interaction with Halifax Water Staff' have been removed from this table.

Over eight in ten (83%) customers who have had a service interaction with Halifax Water staff are *very or generally satisfied* with the **promptness** of staff (i.e., how quickly staff responded to questions) One in twelve customers do not know or were unable to provide an answer, and the same proportion are *dissatisfied* with the promptness of Halifax Water staff. Across regions, customers in Dartmouth are most satisfied (93%), followed by those in Halifax county (84%), with those in Halifax City least satisfied with the promptness of staff (77%). Satisfaction with promptness of staff decreases with age (18-34: 93%, 35-54: 82%, 55 plus: 75%). Also, graduates and customers with household income of \$100,000 or more are less likely to be satisfied with promptness, as compared to their counterparts. (Table W6c)



Satisfaction with Halifax Water's Staff Promptness

Among Halifax Water Customers

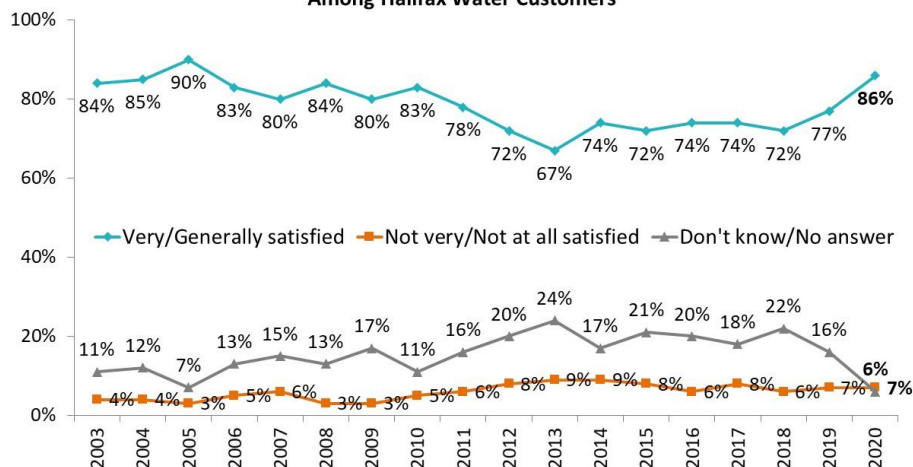


Q.W6c: [ASK ONLY IF 'YES, RECEIVE WATER FROM HALIFAX WATER' IN Q.W4] For each of the following, please tell me whether you are very satisfied, generally satisfied, not very satisfied, or not at all satisfied with the service you have received from Halifax Water: Promptness – How quickly Halifax Water staff were able to respond to your questions? (n=184)
 Note: The 2020 responses for 'Have not used this Halifax Water service' and 'have not had any service interaction with Halifax Water Staff' have been removed from this table.

Close to nine in ten (86%) customers who have had a service interaction with Halifax Water are *very or generally satisfied* with Halifax Water's **ability to answer questions**. Satisfaction is elevated among younger customers aged 18 to 34 years (96%). High income customers with \$100,000 or more in annual household income are less likely to be satisfied with Halifax Water's ability to answer questions (72%). (Table W6d)

Satisfaction with Halifax Water's Ability to Answer Questions

Among Halifax Water Customers

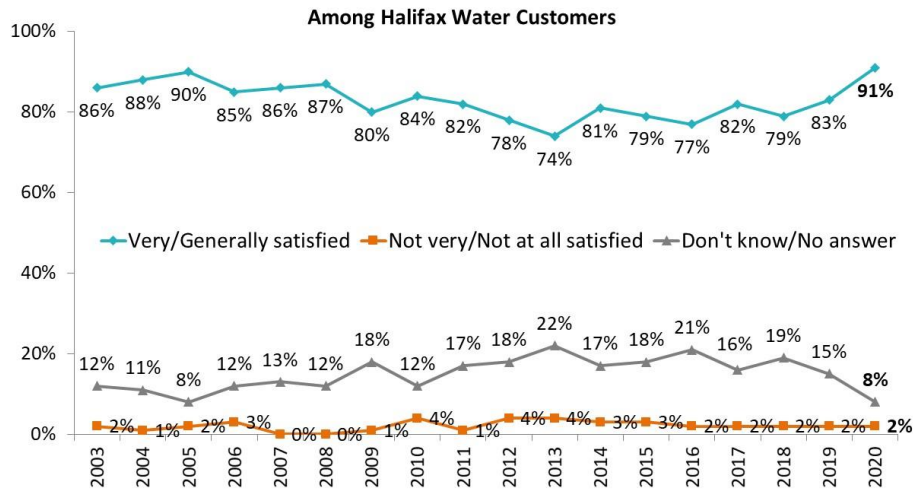


Q.W6d: [ASK ONLY IF 'YES, RECEIVE WATER FROM HALIFAX WATER' IN Q.W4] For each of the following, please tell me whether you are very satisfied, generally satisfied, not very satisfied, or not at all satisfied with the service you have received from Halifax Water: Ability to answer questions – How well Halifax Water answers your questions? (n=174)
 Note: The 2020 responses for 'Have not used this Halifax Water service' and 'Have not had any service interaction with Halifax Water Staff' have been removed from this table.



Nine in ten Halifax Water customers who have had a service interaction are *very or generally satisfied* with the **politeness** of Halifax Water staff. Satisfaction with politeness of staff is largely consistent across the region and population; among subgroups where satisfaction scores are lower, this is largely due to a greater proportion of *don't know/no answer* responses than reports of dissatisfaction. (Table W6e)

Satisfaction with Halifax Water's Politeness

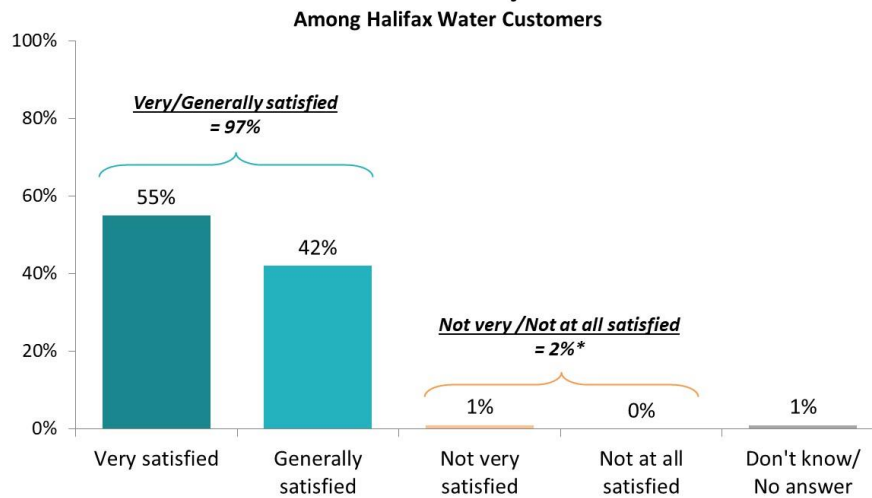


Q.W6e: [ASK ONLY IF 'YES, RECEIVE WATER FROM HALIFAX WATER' IN Q.W4] For each of the following, please tell me whether you are very satisfied, generally satisfied, not very satisfied, or not at all satisfied with the service you have received from Halifax Water: Politeness – The politeness of Halifax Water staff? (n=171)
Note: The 2020 responses for 'Have not used this Halifax Water service' and 'Have not had any service interaction with Halifax Water Staff' have been removed from this table.

New this year, customers were asked to rate their level of satisfaction with the **reliability of services** they receive from Halifax Water. There is near universal satisfaction with Halifax Water's reliability (97%) overall, and across regions and demographic groups. (Table W6f)



Satisfaction with Halifax Water's Reliability



Q.W6f: [ASK ONLY IF 'YES, RECEIVE WATER FROM HALIFAX WATER' IN Q.W4] For each of the following, please tell me whether you are very satisfied, generally satisfied, not very satisfied, or not at all satisfied with the service you have received from Halifax Water: Reliability – How reliable are the services you receive from Halifax Water? (n=295)
Note: The 2020 responses for 'Have not used this Halifax Water service' and "Have not had any service interaction with Halifax Water Staff" have been removed from this table. *Due to rounding. New in 2020

Customer Service Index

Once again, this year, Narrative Research is pleased to present Halifax Water with a Customer Service Index (CSI). To provide an overall assessment of Halifax Water's service performance, the CSI this year was calculated based on customers' ratings on seven service-focused questions, namely:

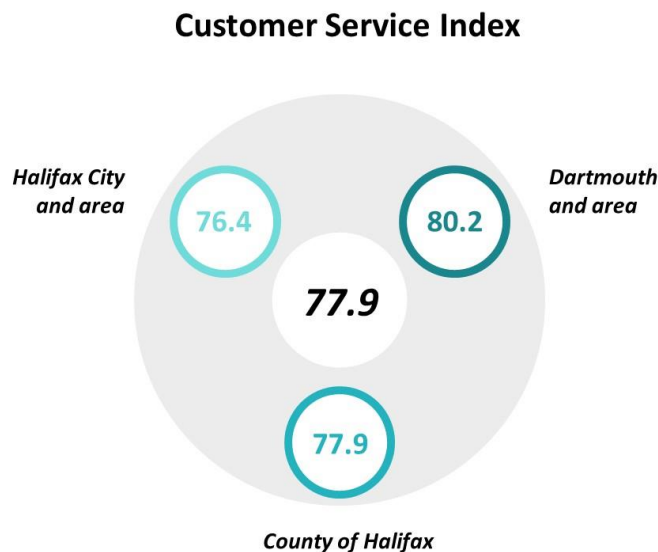
- Overall satisfaction with the Halifax Water (QW5);
- Satisfaction with overall service delivery (QW6a);
- Satisfaction with accessibility of Halifax Water staff (QW6b);
- Satisfaction with promptness of Halifax Water in responding to questions (QW6c);
- Satisfaction with Halifax Water's ability to answer questions (QW6d);
- Satisfaction with the politeness of Halifax Water staff (QW6e); and
- Satisfaction with the reliability of Halifax Water (QW6f).

The 2020 survey included a new question concerning satisfaction with the reliability of Halifax Water, and this question has been included in the calculation of the Customer Service Index. Also, a new code was introduced at the beginning of the Question W6 series whereby volunteered responses were captured identifying customers that did not have an interaction with Halifax Water on the service dimensions explored. Respondents who voluntarily offered this response skipped the subsequent questions in the series.



Thus, this year the Index included only those Halifax Water customers who have had a service interaction with the utility. In calculating Index scores, ratings on these seven questions were averaged and transformed into a scale ranging from a low of 0 to a high of 100. Thus, the maximum possible score on the CSI is 100, while the minimum is 0. Any question to which a customer who has had a service interaction with Halifax Water did not respond was eliminated from the calculation, with the Index score for that customer being calculated on the remaining questions.

The Customer Service Index stands at 77.9 this year. Customers in Dartmouth and surrounding areas have a slightly higher Index score compared with others. The 2020 CSI should be treated as an updated Index as it is less statistically comparable to previous indices calculated, given the enhanced targeting this year of customers who have expressly had a service interaction with the organization. A Customer Satisfaction Index of 77.9 represents a favourable performance in Narrative Research’s experience.



It is important to note that while satisfaction with various service metrics happily is more widespread than in 2019 (catalogued elsewhere in this report via overall satisfaction on many measures being higher this year as compared to last year), this satisfaction is ‘less intense’ in certain instances in 2020. Otherwise stated, the proportion of very satisfied customers has diminished this year.



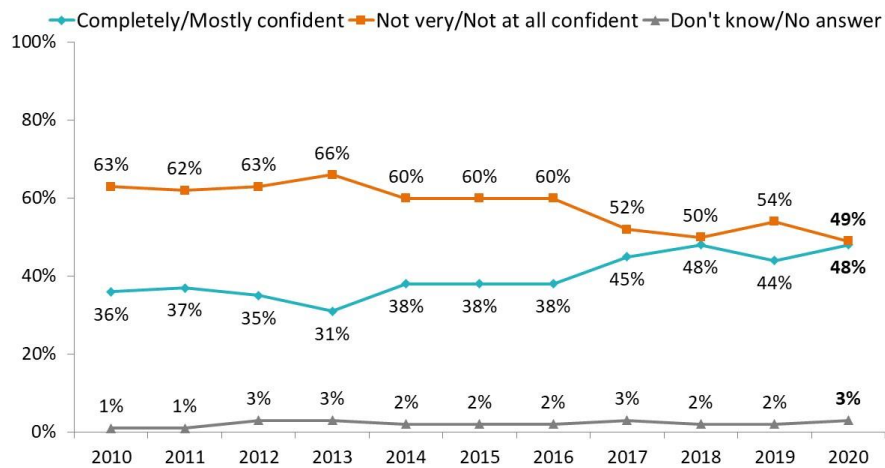
Safety of Halifax Harbour for Recreation

Confidence among the population in terms of the safety of the water in Halifax Harbour for recreation is modest. Nonetheless, confidence has marginally increased this year (48%, compared with 44% in 2019), to mimic the results observed in 2018. HRM residents are modestly less likely to be *not confident* regarding the safety of water in Halifax Harbour (49% compared with 54% in 2019) indicating that they are either *not very* or *not at all confident*.

2020	
Completely confident	8%
Mostly confident	41%
Not very confident	31%
Not at all confident	19%
Don't know/No answer	3%

Residents aged 18 to 34 years (58%), post-secondary graduates (61%), and residents with household incomes of \$100,000 or more (56%), have higher confidence that the water quality of Halifax Harbour is safe for recreation. (Table W28)

Confidence That Water Quality of Halifax Harbour Is Safe for Recreational Use



Q.W28: Halifax harbour water samples indicate that the water is safe for recreational activities such as swimming and boating. How confident are you that the water quality of Halifax Harbour is safe for recreational activities? Are you completely confident, mostly confident, not very confident, or not at all confident? (n=400) *Note: Question wording differs slightly year-over-year.*

Water Source

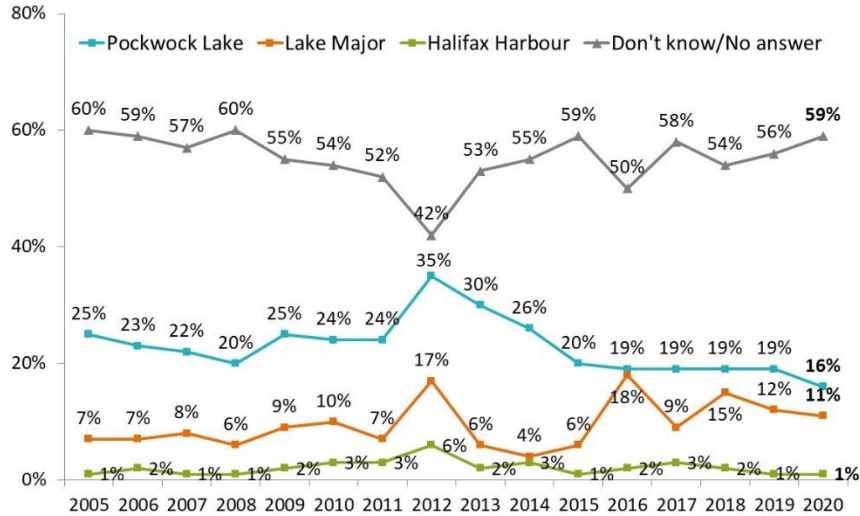
There continues to be uncertainty regarding Halifax area residents' knowledge of the source of their municipal tap water. Specifically, six ten Halifax Water customers (59% compared with 56% last year) cannot name the source of their tap water.

One in six customers identified Pockwock Lake as the primary source and one in ten residents mentioned Lake Major, consistent with the previous year's results. Two percent of customers cited Chain Lake, while one percent of Halifax Water customers each mentioned Lake Loon, Long Lake, Bedford Basin, Atlantic Ocean, and Halifax Harbour.



Across the population, women, younger customers aged 18 to 34 years, and those with annual household income of \$50,000 or less are more likely than others to be unsure of the source of their tap water. (Table W9)

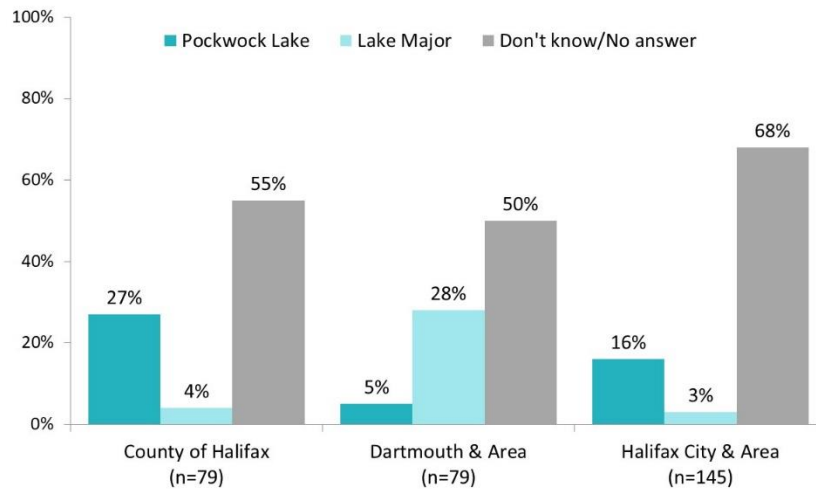
Primary Source of Municipal Tap Water Total Top Mentions, Among Halifax Water Customers



Q.W9: [ASK ONLY IF 'YES, RECEIVE WATER FROM HALIFAX WATER' IN Q.W4] To the best of your knowledge, which body of water is the primary source of your tap water supplied by Halifax Water? Probe once: Any other sources? (n=303)

The number of customers who are unsure of their primary tap water source is highest in Halifax City. Those in Dartmouth and its surrounding area are more likely than others in the region to name Lake Major as the primary source of their tap water, and least likely to name Pockwock Lake, consistent with previous findings. (Table W9)

Primary Source of Municipal Tap Water Key Mentions by Area, Among Halifax Water Customers



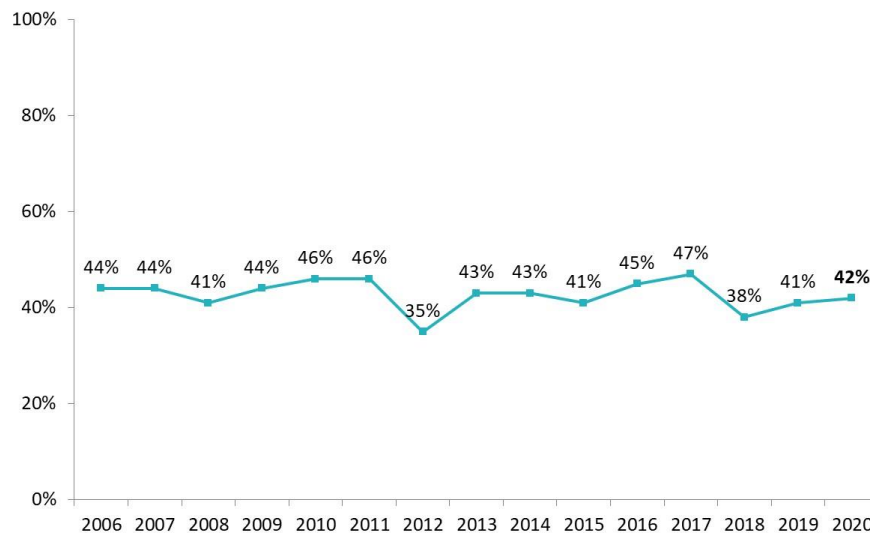
Q.W9: [ASK ONLY IF 'YES, RECEIVE WATER FROM HALIFAX WATER' IN Q.W4] To the best of your knowledge, which body of water is the primary source of your tap water supplied by Halifax Water? Probe once: Any other sources?



Water Filter Use

Consistent with last year, four in ten residents (42%) report using some form of water treatment device. Across the region, residents living in the previous County of Halifax are most likely to use a water filter or home water treatment device (County of Halifax: 53%, Dartmouth: 30%, and Halifax City: 36%). Meanwhile, residents using a well (73%) are much more likely than Halifax Water customers (31%) to use a water filtration device. (Table W17a)

Use a Water Filter or Other Home Water Treatment Device?
% Saying "Yes"



Q.W17a: Do you use a water filter or other home water treatment device? (n=400)

In terms of the type of water filter or home treatment device, three in ten residents who use a water filter reported using a **pitcher with a water filter** (20% compared with 29% last year). A similar proportion mentioned using a **water softener system** (18% compared with 11% last year), while one in six residents mentioned using a **water filter on tap**. One in eight (13%) residents cited using a **fridge filter** and one in ten residents reported using a **Brita filter**. Other methods are used by eight percent of residents or fewer. (Table W17b)

Type of Water Filter or Other Home Treatment Device Used															
	Key Mentions														
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Pitcher with water filter	54%	42%	43%	33%	33%	37%	21%	44%	31%	44%	25%	34%	35%	29%	20%
Water softener system	5%	1%	7%	12%	11%	9%	9%	10%	18%	12%	18%	11%	16%	11%	18%
Water filter on tap	21%	19%	19%	18%	16%	10%	33%	14%	16%	9%	11%	14%	7%	13%	15%
Fridge filter/Part of refrigerator	--	2%	3%	6%	10%	10%	15%	10%	14%	13%	12%	12%	12%	16%	13%
Brita filter/Brita	--	--	5%	9%	9%	15%	13%	2%	1%	4%	6%	4%	6%	11%	10%

Q.W17b: [IF 'YES' IN Q.17A] What type of water filter or other home water treatment device to you use in your household? (n=162)



Halifax area residents offer several reasons why they use a water filter or home treatment device. One-quarter of residents (26%) offered as rationale **their concerns about water quality**. One-quarter cited using such devices **to remove chemicals** (24%), while a similar proportion of residents (23%) mentioned getting **an improved taste** after the treatment. All other reasons are mentioned by less than one in ten residents. (Table W17c)

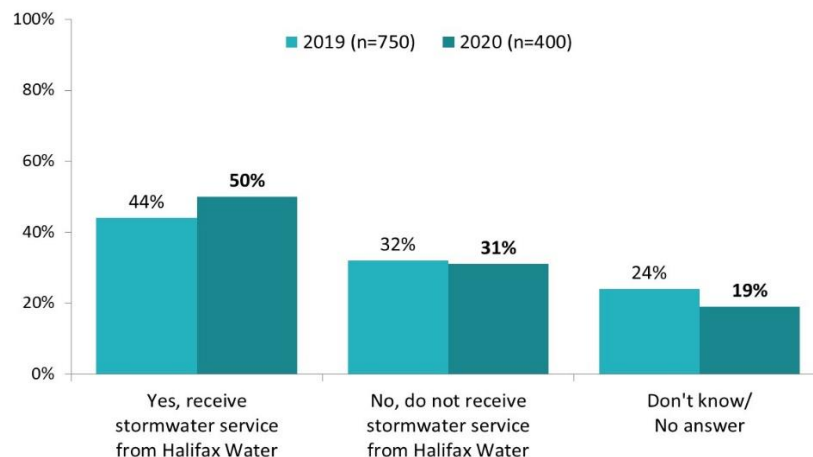
Why Use a Water Filter or Other Home Treatment Device													
	Key Mentions												
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Concerns about water quality	18%	29%	20%	25%	23%	19%	20%	26%	12%	19%	26%	29%	26%
To remove chemicals	23%	24%	32%	21%	27%	27%	33%	26%	25%	28%	20%	22%	24%
Improved taste	33%	32%	33%	31%	36%	36%	25%	24%	33%	32%	30%	33%	23%
To remove bacteria	8%	7%	8%	8%	23%	9%	8%	6%	5%	6%	6%	9%	7%
Concerns about well water	2%	1%	0%	1%	--	--	--	--	1%	1%	2%	3%	7%
Was given to me/Received as a gift/Came with the fridge/house	4%	4%	9%	6%	3%	4%	6%	10%	7%	7%	8%	7%	6%

Q.W17c: [IF 'YES' IN Q.17A] Why do you use a water filter or other home treatment device? Probe: Anything else? (n=162)

Stormwater and Wastewater Systems

Again, this year, residents were asked if their household receives stormwater service from Halifax Water. One-half of residents reported receiving this service from Halifax Water (50% compared 44% last year), while three in ten residents indicated they did not. Notably, two in ten residents were unsure in this regard (19% compared to 24% last year). Across regions, residents of Halifax County are less inclined (44%) than those living in Dartmouth and surrounding areas (59%) or Halifax City (52%) to report they receive stormwater service. Six in ten Halifax Water customers report receiving this service, while one-quarter of residents with a well indicated they receive stormwater service from Halifax Water. (Table W40)

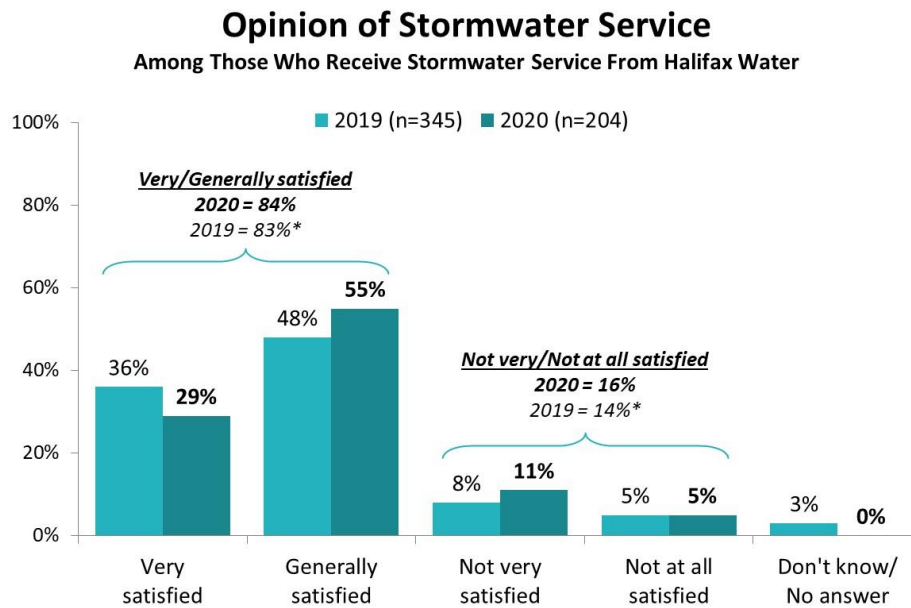
Household Receives Stormwater Service From Halifax Water



Q.W40: Stormwater service includes the maintenance of ditches and culverts in rural and suburban areas, and underground pipes and pumping systems in urban areas. Does your household receive stormwater service from Halifax Water?



Among those who receive stormwater service from Halifax Water, a solid majority of residents (84%) are either *very* or *generally satisfied* with the service. One in six residents (16%) are not satisfied with the service. Regionally, residents of Halifax City are most satisfied (92%), followed by those in Dartmouth and surrounding areas (88%), while those in Halifax County are least satisfied with stormwater services (72%). Across demographics, male residents, those aged 35 to 54 years, and post-secondary graduates are more likely to be *dissatisfied* than their respective counterparts. Meanwhile residents with annual household income of less than \$50,000 are more likely to be *satisfied* than those with higher household incomes. Of note, nine in ten Halifax Water customers who receive wastewater services are satisfied with the service. (Table W41)



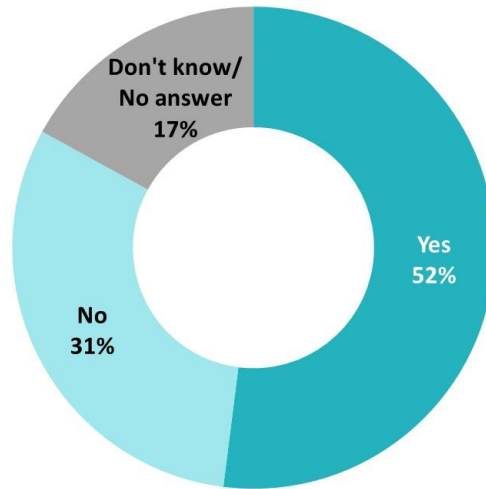
Q.W41: [IF Q.W40=1 (RECEIVE STORMWATER SERVICE FROM HALIFAX WATER)] All things considered, would you say you are very satisfied, generally satisfied, not very satisfied, or not at all satisfied with the stormwater service you receive from Halifax Water? *Due to rounding.

New this year, residents were asked if their household receives wastewater service from Halifax Water. Over one-half of residents (52%) reported receiving this service from Halifax Water, while three in ten residents indicated they did not receive this service. One in six residents are unsure in this regard. Residents in the County of Halifax are less inclined than those in Dartmouth or Halifax City to report they receive wastewater service from Halifax Water (County of Halifax: 36%, Dartmouth: 61%, and Halifax City: 63%).

Across demographics, residents with annual household income of \$100,000 or more are less likely to indicate they receive this service as compared to those with lower household incomes. Of note, two-thirds of Halifax Water customers reported receiving this service, while one in ten residents with a well indicated they receive wastewater service from Halifax Water. (Table W49)



Household Receives Wastewater Service From Halifax Water

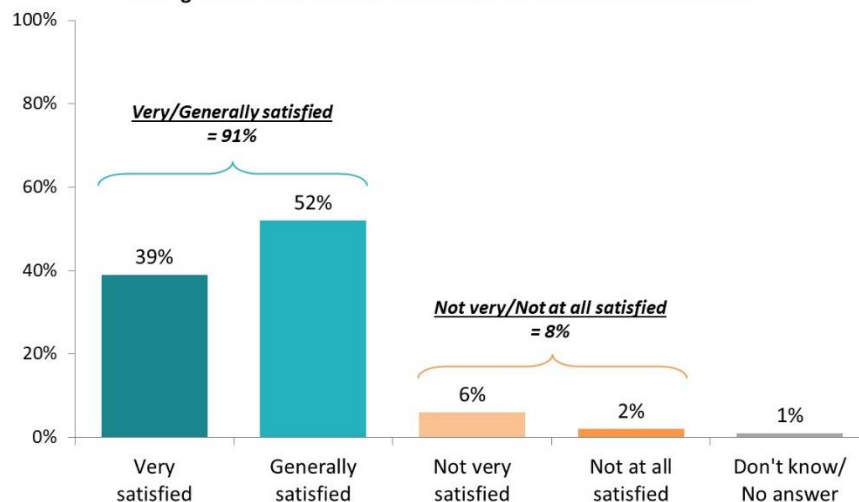


Q.W49: Wastewater service includes the maintenance and operation of wastewater/sewer collection pipes, pumping stations and treatment plants. Does your household receive wastewater service from Halifax Water? (n=400) *New in 2020.*

New this year, residents who receive wastewater service from Halifax Water were asked how satisfied they were with the service. Among these residents, nine in ten are either *very* or *generally satisfied* with the service. Regionally, residents of Halifax City are more likely to be satisfied (98%) than those in Dartmouth (87%) or County of Halifax (84%). Across demographics, residents aged 18 to 34 years are more likely to be satisfied with wastewater services than older residents. Of note, over nine in ten Halifax Water customers who receive wastewater service are satisfied with the service. (Table W50)

Opinion of Wastewater Service

Among Those Who Receive Wastewater Service From Halifax Water



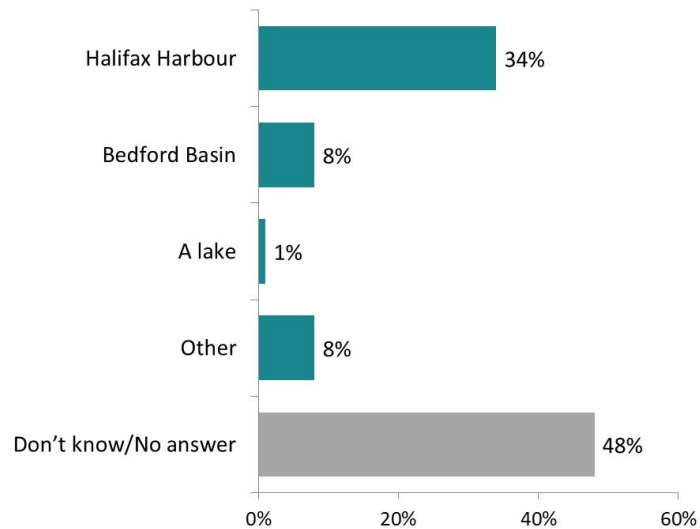
Q.W50: [IF Q.W49=1 (RECEIVE WASTEWATER SERVICE FROM HALIFAX WATER)] All things considered, would you say you are very satisfied, generally satisfied, not very satisfied, or not at all satisfied with the wastewater service you receive from Halifax Water? (n=216) *New in 2020.*



Also new this year, residents who receive wastewater services from Halifax Water were asked which water body eventually receives the treated wastewater from their property. One-half of such residents did not know or could not provide a definite response. One-third of such residents mentioned Halifax Harbour as the water body that receives the treated wastewater from their property. Eight percent of residents cited the Bedford Basin. (Table W51)

Water Body Which Receives Treated Wastewater

Among Those Who Receive Wastewater Service From Halifax Water
Total Unaided Mentions



Q.W51: [IF Q.W49=1 (RECEIVE WASTEWATER SERVICE FROM HALIFAX WATER)] To the best of your knowledge, which water body eventually receives the treated wastewater from your property? (n=216) *New in 2020.*

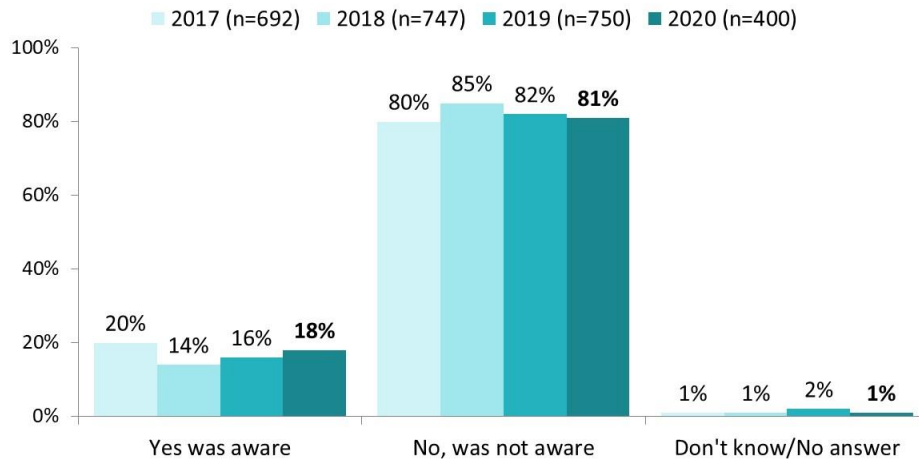
Lead Water Lines

The large majority of customers (81%) remain unaware of Halifax Water’s enhanced lead service line replacement program for residential customers to replace the lead service water lines that connect the water main in the street to a customer’s home. Specifically, two in ten residents (18%) are aware of this program.

The proportion of residents who are aware of this program is generally consistent across regions. Awareness is elevated among post-secondary graduates and residents with household income of \$50,000 to less than \$100,000. (Table W33)



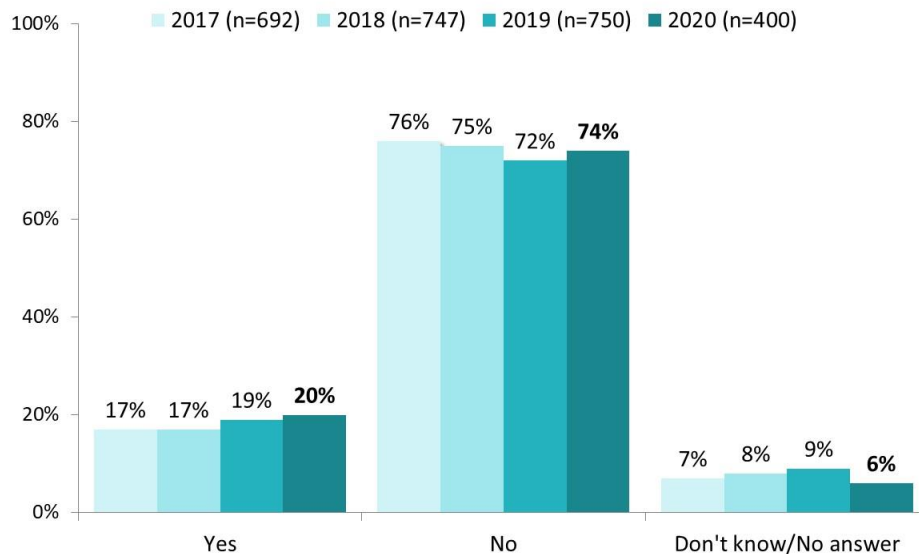
Aware of Halifax Water’s Enhanced Program to Replace Lead Water Service Lines



Q.W33: On October 1st 2020 Halifax Water launched an enhanced lead service line replacement program for residential customers wanting to replace their lead water service lines that connect the water main in the street to a customer’s home. The enhanced program will see Halifax Water replace the full lead service line, which includes both the public and the private section of the service line, at Halifax Water’s expense. Prior to today, were you aware of this enhanced program?
Note: Slight change of question wording from 2019.

As lead service lines are found primarily in homes constructed prior to the 1960s, participants were asked if they have a home constructed prior to the 1960s. Consistent with previous results, two in ten residents confirmed having such a home. Six percent residents were not sure if their home was constructed prior to the 1960s. (Table W34)

Have a Home Constructed Prior to the 1960s

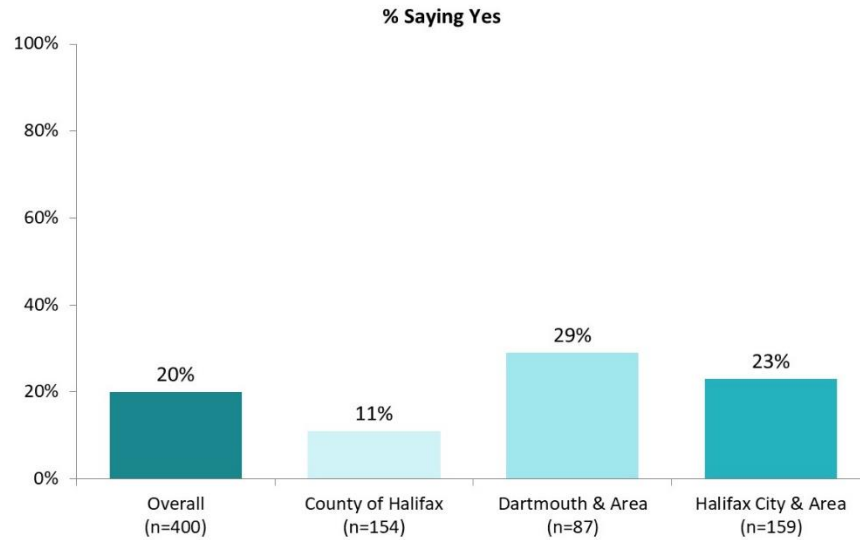


Q.W34: Lead water service lines are found primarily in homes constructed prior to the 1960s. Do you have a home that was constructed prior to the 1960s?



Those in Dartmouth and area are most likely to have a pre-1960s home, followed by residents of Halifax City and then Halifax County. (Table W34)

Have a Home Constructed Prior to the 1960s

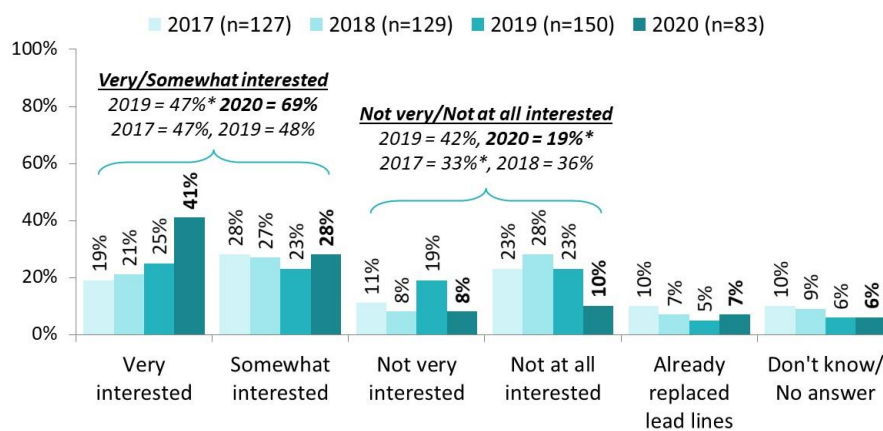


Q.W34: Lead service lines are found primarily in homes constructed prior to the 1960s. Do you have a home that was constructed prior to the 1960s?

This year again, residents with a home constructed prior to the 1960s were asked if they would be interested in using the lead service line replacement program. This year the question wording was slightly changed to convey that the program is funded by Halifax Water. A large majority (69%) of such residents mentioned they are interested, including 41 percent of residents who are *very interested* (compared to 25% in 2019). (Table W35)

Interest in Using Halifax Water Funded Lead Service Line Replacement Program within Next Few Years

Among Those Who Have a Home Constructed Prior to the 1960s



Q.W35: [ASK IF 'YES' IN Q.W34] Lead can enter water through contact with lead water service lines and possibly internal plumbing fixtures such as taps, brass fittings, and lead or tin solder. High levels of lead can lead to serious health issues. Knowing this, are you very interested, somewhat interested, not very interested, or not at all interested in using this Halifax Water funded lead service line replacement program within the next few years? *Due to rounding. Note slight change of question wording in 2019 and 2020.



Information Campaigns

Once again, the Internet is the most preferred method to access information related to Halifax Water’s water, wastewater, and stormwater programs. Approximately one-half of residents (48%, down from 56% in 2019) mentioned the **Internet (in general)**, outranking any other method of accessing information by a large margin. One in six residents mentioned the **Halifax Water website**, while one in ten residents mentioned contacting Halifax Water via phone.

Other methods are mentioned by six percent of residents or fewer. Internet is the most preferred information source among residents across regions and demographic subgroups. In addition, younger residents are more likely than older residents aged 55 plus years to cite the Internet as their preferred source of information. (Table W26)

Most Preferred Method for Accessing Information About Halifax Water’s Water, Wastewater, and Stormwater Programs and Services													
	Key Mentions												
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Internet (general)	48%	53%	52%	51%	50%	54%	63%	58%	59%	52%	41%	56%	48%
Halifax Water website	1%	1%	4%	3%	3%	3%	3%	6%	7%	6%	15%	10%	16%
Phone/Would call them	3%	2%	2%	4%	13%	3%	8%	1%	7%	7%	5%	6%	11%
Email	--	--	--	--	--	--	--	--	--	--	--	--	6%
On the bill	--	--	--	--	--	--	--	--	--	--	--	--	5%

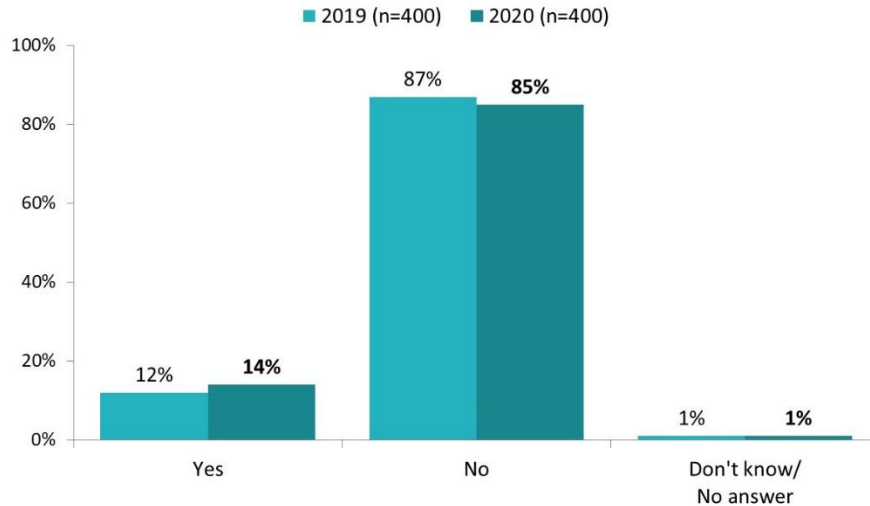
Q.W26: What is your most preferred method for accessing information related to Halifax Water’s programs and services? Probe: Any others? (n=400) *Note: Slight change of question wording in 2019 and 2020.*

Program Awareness and Interest

Residents were asked if they were aware that Halifax Water has an emergency financial assistance program to help low income customers. The vast majority of residents are unaware that Halifax Water has such a program. One in seven residents (14%) confirmed being aware of the emergency financial assistance program. (Table W38)



Aware Halifax Water Has Emergency Financial Assistance Program to Help Low Income Customers

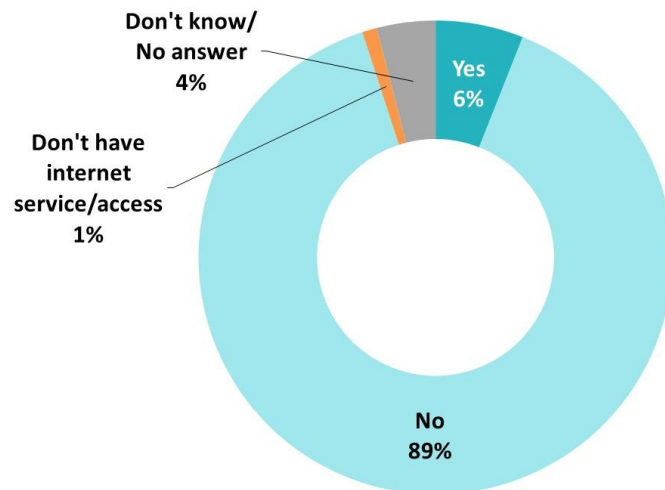


Q.W38: Are you aware that Halifax Water has an emergency financial assistance program to help low income customers?

Customer Portal

New this year, HRM residents were asked if they had seen or heard any information related to Halifax Water’s Customer Portal. Most residents (89%) are unaware of the customer portal, while a modest proportion of six percent of residents are aware. (Table W47) Awareness levels are consistent regionally. Across demographics, postgraduates are more likely to have seen or heard information related to the customer portal than other education subgroups.

Seen or Heard Information About Halifax Water’s Customer Portal



Q.W47: This autumn Halifax Water is launching an online Customer Portal that will allow customers to manage their account over the Internet. Prior to today, have you heard or seen any information related to the Customer Portal? (n=400)
New in 2020.

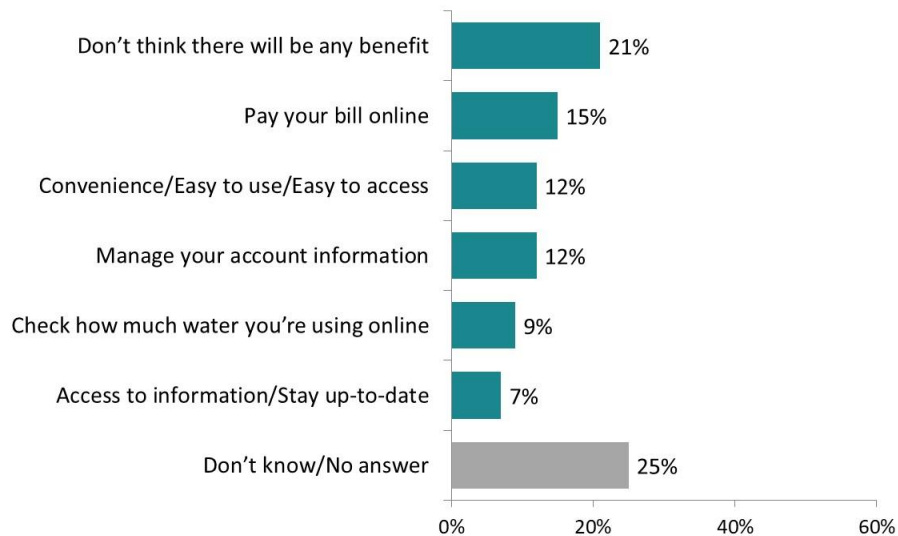


New this year, residents were also asked what according to them would be the main benefit of using the Halifax Water customer portal for their household. Among residents with access to the Internet, one-quarter did not know or could not provide a definite response, while two in ten residents mentioned they do not think there will be any benefit. Fifteen percent of residents cited paying their bill online as the main benefit. Twelve percent mentioned convenience of use, while the same percentage mentioned managing their account information. One in ten residents mentioned checking how much water they are using online, and seven percent mentioned accessing information or staying up to date.

Across regions, those in the County of Halifax are more likely to think there will not be any benefit in using the customer portal, as compared to those in Halifax City or Dartmouth and area. (Table W48)

Main Benefit of Using Customer Portal

Among Those With Internet Access
Key Unaided Mentions



Q.W48: [NOT IF Q.W47=7 (DON'T HAVE INTERNET SERVICE/ACCESS)] For your household, what would be the main benefit of using the "Customer Portal"? Probe: Anything else? (n=395) *New in 2020.*

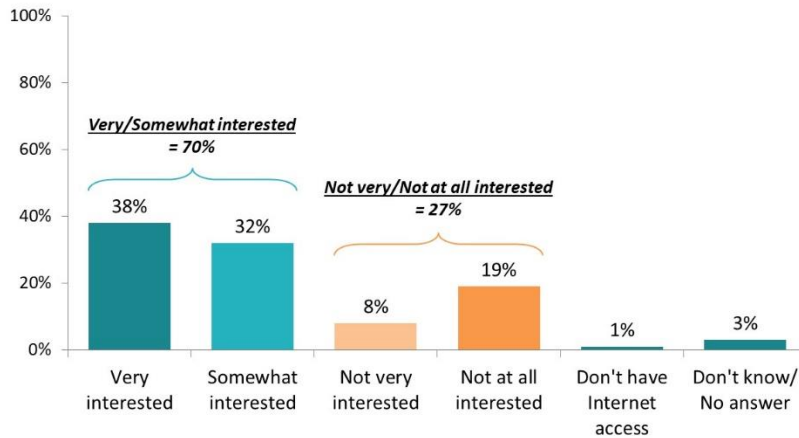
Halifax Water customers with Internet access were asked this year if they would be interested in managing their account online through the customer portal. Seven in ten such customers said they were either *very* or *somewhat* interested, while three in ten said they were *not very* or *not at all interested* in managing their account online.

Regionally, interest does not vary much. Across demographics, level of interest declines with increase in age (18-34: 84%, 35-54: 77%, 55 plus: 50%). (Table W18)



Interest in Managing Account Online

Among Halifax Water Customers Who Have Internet Service/Access

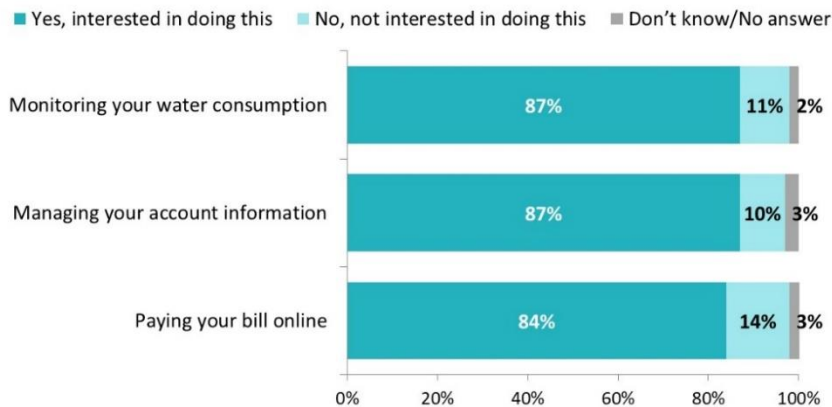


Q.W18: [POSE ONLY IF W4=1 [RECEIVE WATER FROM HALIFAX WATER] [DO NOT POSE IF CODE 7 'DON'T HAVE INTERNET SERVICE/ACCESS' IN W47 OR IF CODE 97 'DON'T HAVE INTERNET SERVICE/ACCESS' IN W48] Through the Customer Portal, you would be able to monitor your water consumption, manage your account information, and pay your bills online. Would you be very interested, somewhat interested, not very interested, or not at all interested in managing your account online? (n=297) *New in 2020.*

Also new this year, Halifax Water customers interested in managing their account online were asked if they would be interested in monitoring their water consumption, managing their account information, or paying their bills online. Close to nine in ten (87%) such customers mentioned they are interested in using the former two services, while a similar proportion (84%) mentioned they were interested in the latter. Of note, older residents aged 55 plus years are less likely to be interested in managing their account online, monitoring their water consumption, or paying their bills online, as compared to their younger counterparts. Female customers are more likely to be interested in paying their bills online than male customers. (Tables W46a-c)

Interest in Using Customer Portal Services

Among Those Very or Somewhat Interested in Managing Their Account Online and Who Have Internet Access



Q.W46a-c: [POSE ONLY IF Q.W4=1 (RECEIVE WATER FROM HALIFAX WATER)] [DO NOT POSE IF CODE 3 'NOT VERY INTERESTED' OR 4 'NOT AT ALL INTERESTED' OR 97 'DON'T HAVE INTERNET SERVICE/ACCESS' IN Q.W18 OR CODE 7 'DON'T HAVE INTERNET SERVICE/ACCESS' IN Q.W47 OR CODE 97 'DON'T HAVE INTERNET SERVICE/ACCESS' IN W48] And while managing your account online, would you be interested in using the following Customer Portal online services: (n=208) *New in 2020.*

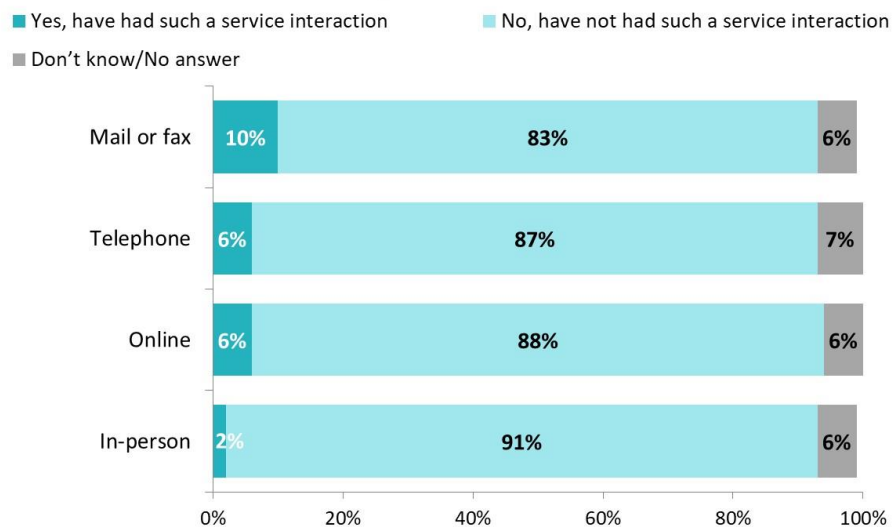


Service Interaction

The following series of new questions were asked this year regarding service interactions of Halifax area residents with Halifax Water, in light of the current pandemic.

Halifax area residents have had very limited service interaction with Halifax Water since the beginning of the pandemic period in mid-March of this year. One in ten residents have had a service interaction via mail or fax. Six percent of residents have had a service interaction by telephone, and the same percent have interacted online. Of note, two percent of residents have had a service interaction in-person. (Table W42a-d)

Service Interaction with Halifax Water Since Mid-March by Methods



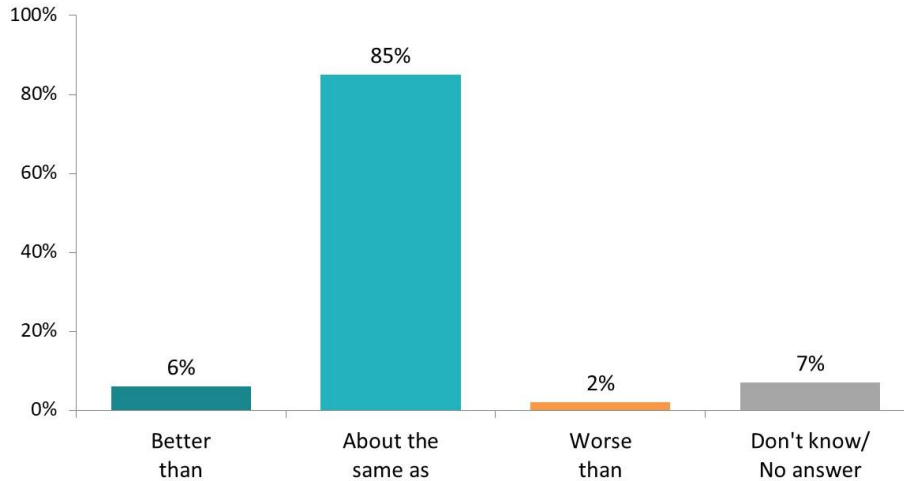
Q.W42a-d: Have you had a service interaction with Halifax Water since the beginning of the pandemic period in mid-March this year, by any of the following methods? (n=400) *New in 2020.*

The vast majority of Halifax area residents who have had a service interaction with Halifax Water during the pandemic, rate the overall service provided by Halifax Water as *about the same* as the service provided by Halifax Water prior to the pandemic.

Six percent of such residents said the service provided during the pandemic was *better* than that provided prior to the pandemic, while two percent mentioned it was *worse*. Seven percent of such residents did not provide a definite response to this question. (Table W43)



Service Provided by Halifax Water During the Pandemic Period vs. Prior to the Pandemic Among Those Who Received Service During the Pandemic



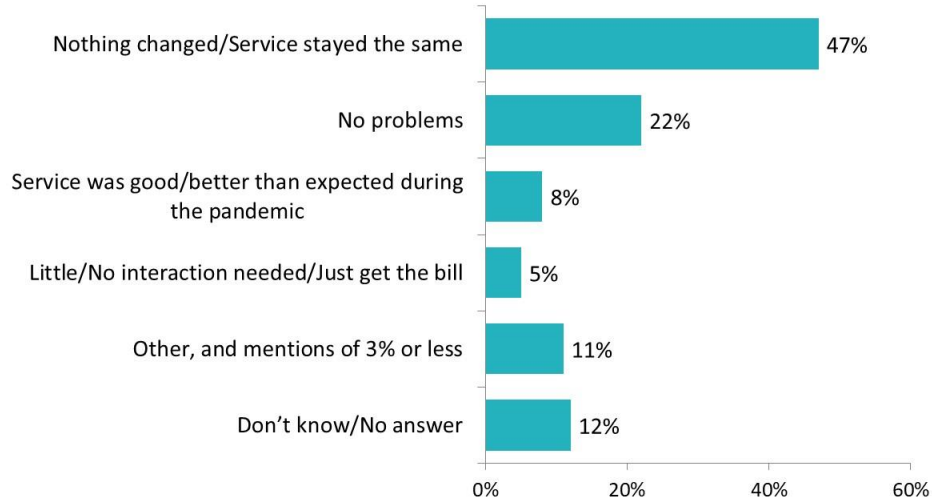
Q.W43: [POSE IF RECENTLY HAS RECEIVED SERVICE AS INDICATED IN Q.W42a-d] Overall, would you say the overall service provided by Halifax Water specifically during the pandemic period was better than, about the same as, or worse than the service provided by Halifax Water prior to the pandemic? (n=72) *New in 2020.*

Among those who mentioned that the service was about the same during the pandemic as before, six in ten residents did not provide a rationale for their opinion. One-half of these residents mentioned nothing changed or the service stayed same, while two in ten provided a response of “don’t know/no answer.” Two in ten residents mentioned they experienced no problems, while eight percent said the service during the pandemic was good or better than what they had expected. The few who mentioned the service was better than usual did not provide any adequate information as rationale for this opinion, while those who said the service was worse mentioned the staff was harder to reach or slower than usual. (Table W44 Same)



Reason Service Provided by Halifax Water Was About the Same As That Provided During the Pandemic

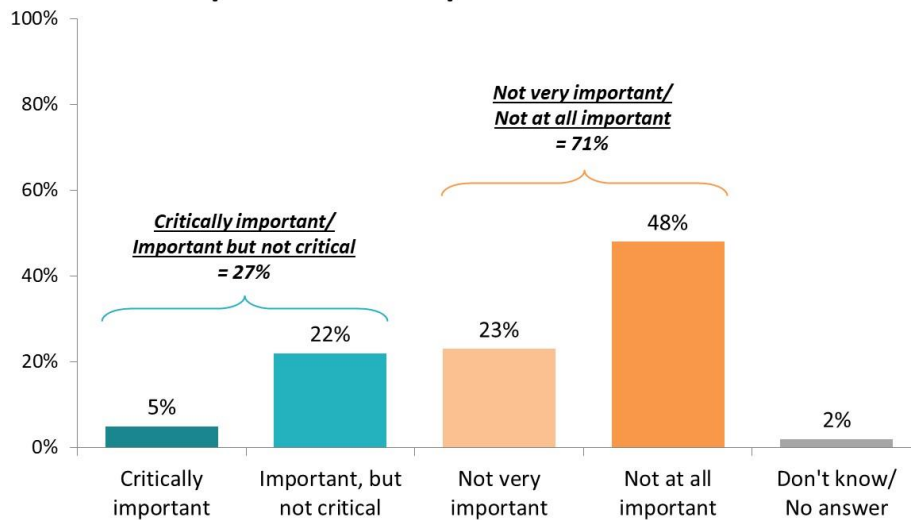
Total Unaided Mentions, Among Those Who Said About the Same As in Q.43



Q.W44: [IF 'ABOUT THE SAME' IN Q.W43] What is the single most important reason why you felt the overall service provided by Halifax Water during the pandemic was [about the same as] the service provided by Halifax Water prior to the pandemic? Probe: Any other reasons? (n=61) *New in 2020.*

Seven in ten Halifax area residents think it is not very or not at all important to be able to visit Halifax Water’s office and speak with a representative in-person. Two in ten residents think visiting the office to speak to a representative in-person is important to them, but not critical. Meanwhile, five percent of residents feel it is critically important for them to be able to visit Halifax Water’s office. (Table W45)

Importance of Being Able to Visit Halifax Water’s Office and Speak with a Representative In-Person



Q.W45: And all things considered, how important is it to you personally to be able to visit Halifax Water’s office in Halifax and speak with a Halifax Water representative in-person? Is it critically important, important, but not critical, not very important, or not at all important? (n=400) *New in 2020.*



Study Methodology

Questionnaire Design

The questions commissioned by Halifax Water and used in this study were designed by Narrative Research, in consultation with Halifax Water staff.

Sample Design and Selection

Halifax Water questions were fielded exclusively on Narrative Research's *Halifax Urban Report* survey alone, unlike previous years in which some questions were also fielded on the Halifax portion of Narrative Research's *Atlantic Quarterly*® survey as well. This survey is a probability telephone survey of adults 18 or older in the Halifax area. Sample records are drawn from both landline and cellular telephone numbers. Data are weighted to ensure results reflect the true population distribution.

Survey Administration

The *Urban Report*® survey was conducted by telephone from October 30 to November 9, 2020. All interviewing was conducted by fully trained and supervised interviewers and a minimum of 10 percent of all completed interviews were monitored or subsequently verified.

Completion Results

Urban Report: Among all eligible respondents contacted, the rate of interview completion was 3 percent. Completion rate is calculated as the number of cooperative contacts (506), divided by the total number of eligible numbers attempted (17,670).

The final disposition of all telephone numbers called is displayed below.



	Urban Report
A. Total Numbers Attempted	22,864
Disconnect / Not in service / Not primary residence	5,022
Fax / Modem	75
Non-Residential Number / Incorrect Number	97
Duplicate	0
B. Eligible Numbers	17,670
Busy	671
Answering Machine	4,825
No Answer	7,880
Scheduled Call Back / Mid Call Back / Qualified Not Available	931
Illness / Incapable	0
Language Problem	41
C. Total Asked	3,322
Respondent / Gatekeeper Refusal	2,465
Mid Terminate / Hang up	26
Never Call List	325
D. Co-operative Contacts	506
Did Not Qualify / Quota Full	106
Completed Interviews	400

Sample Distribution

The overall results are based on 400 interviews with individuals from the Halifax population. A sample of 400 respondents would be expected to provide overall results accurate to within plus or minus 4.9 percentage points in 95 out of 100 samples.

Sample Distribution		
Region	Sample	Margin of Error (19 times out of 20)
County of Halifax	154	± 7.9 percentage points
Dartmouth and Area	87	± 10.5 percentage points
Halifax City and Area	159	± 7.8 percentage points
Halifax Water Customers	303	± 5.7 percentage points
Halifax	400	± 4.9 percentage points