

2011 Survey Purpose & Methodology

Purpose:

- To assess TMWA customers' overall level of satisfaction and attitudes toward water-related issues including quality, sufficiency, and security
- To identify significant differences between customer groups
- To identify trends since 2002 (over a 10 year time period)

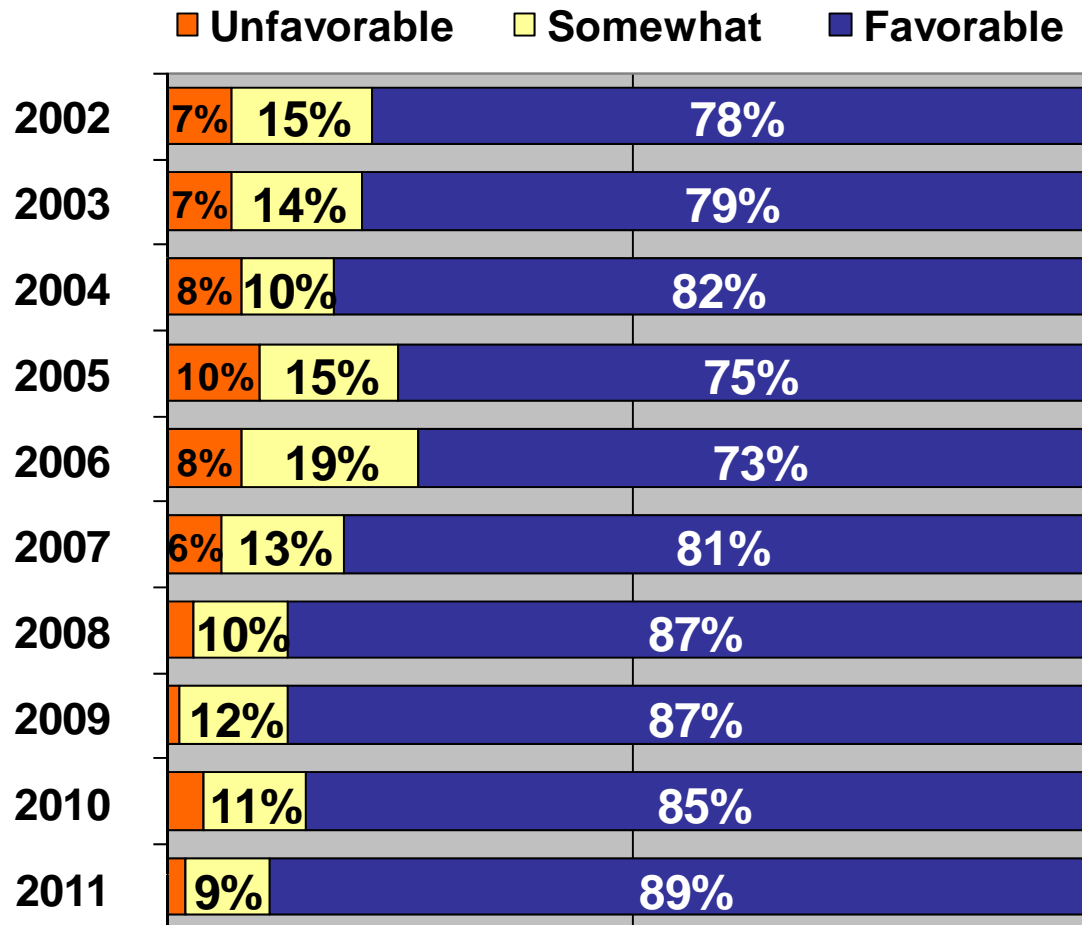
2011 Methodology:

- Telephone Survey conducted by InfoSearch International
- In the field from July 2010 to June 2011; interviews averaged 8-12 minutes
- Sample of 501: 401 Residential and 100 Commercial Customers
- Overall 95% confidence level, sampling error of $\pm 4.4\%$

Questions Added to Survey for 2011:

- Asked how many days per week they can water their yards
- Asked their main source and preferred source of information regarding water
- Asked to elaborate on reason for water quality rating

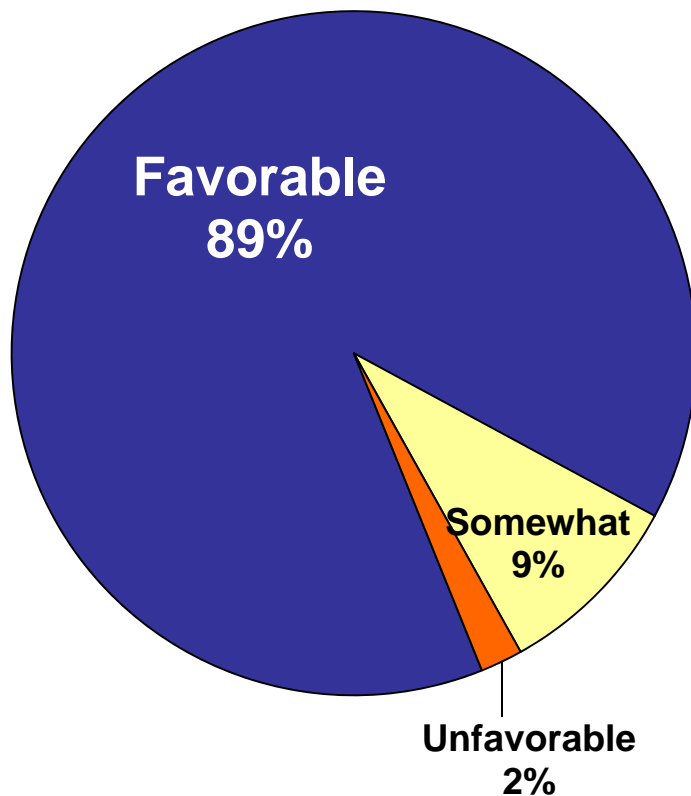
Overall Customer Satisfaction 2002-2011



- From 2002 to 2007, overall satisfaction ratings ranged from 73% to 82% favorable; since 2008, the favorable ratings have been at 85% or higher.

- In 2011, the favorable rating (89%) was the highest to date.

Overall Customer Satisfaction With Sample Comments - 2011



- **Favorable (89%)**

- *“You are doing a wonderful job.”*
- *“Thank you for having a courteous staff.”*
- *“I am very happy with the service.”*
- *“The water is a bargain.”*
- *“I am pretty content.”*
- *“I am very satisfied all the way around.”*

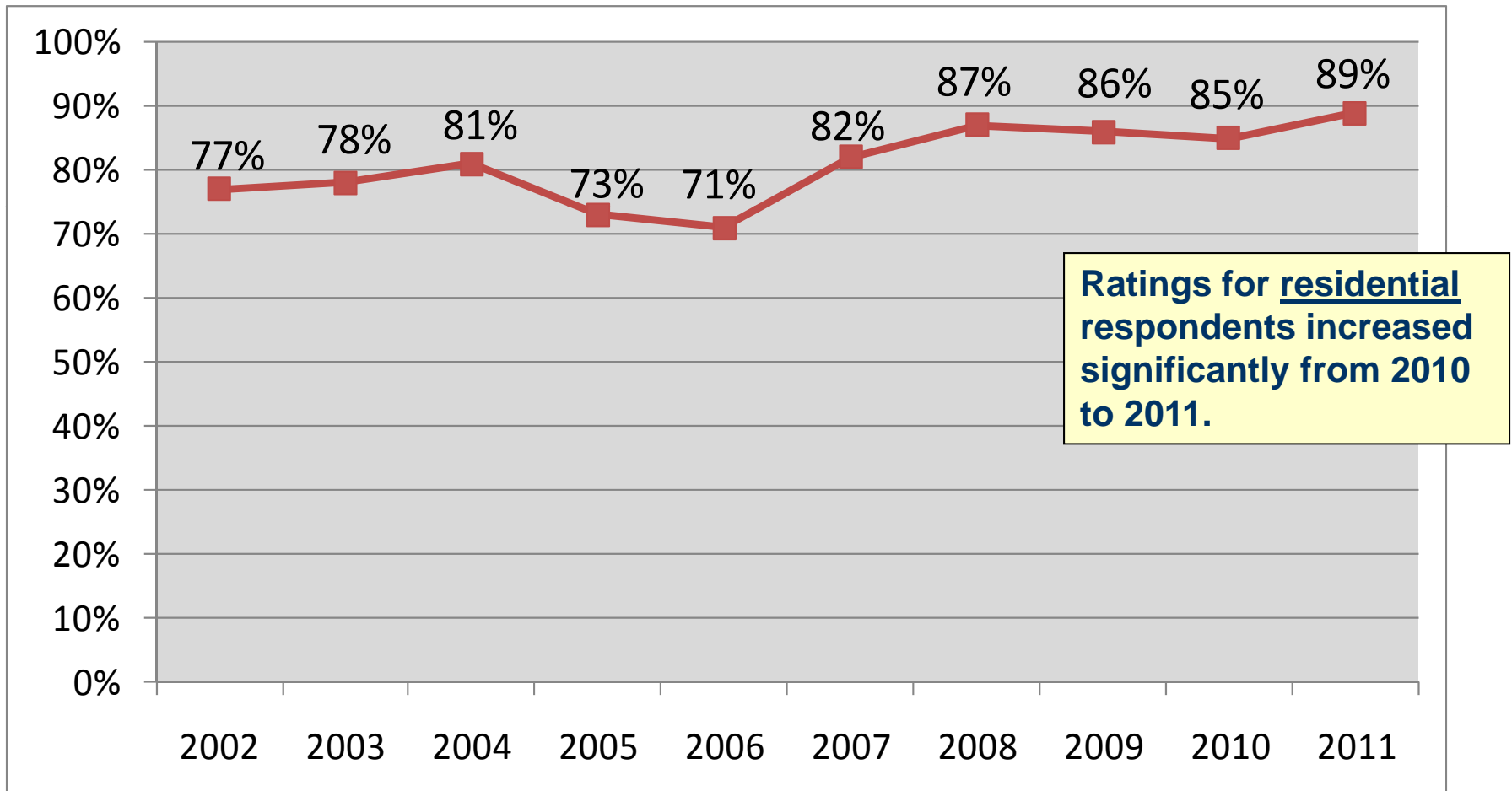
- **Somewhat (9%)**

- *“They need to manage their costs better.”*
- *“Provide quality reports to the public.”*

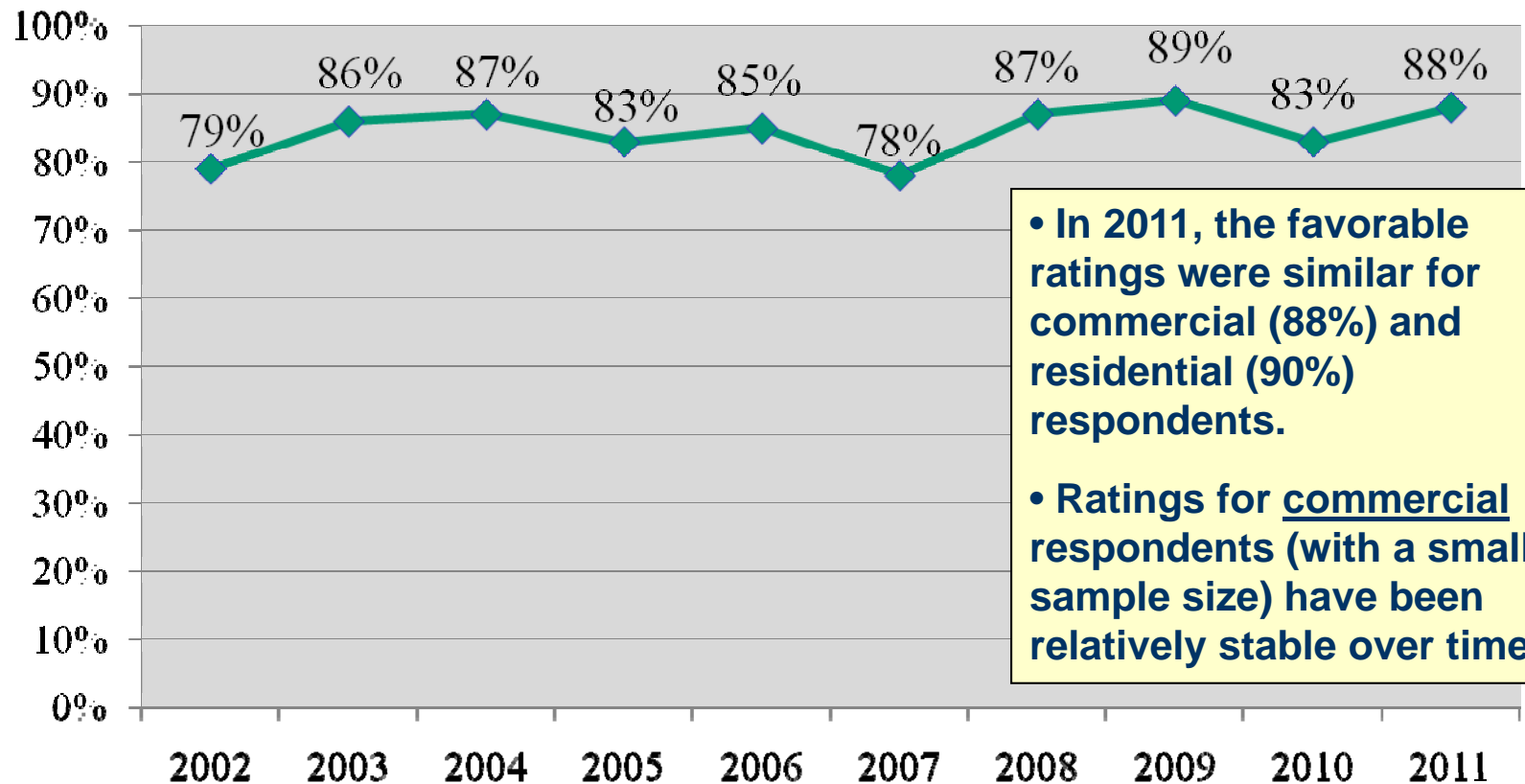
- **Unfavorable (2%)**

- *“If you’re going to put me on a meter, do it!”*
- *“Reduce my bill.”*

Overall Satisfaction Among Residential Respondents 2002 - 2011



Overall Satisfaction Among Commercial Respondents 2002 - 2011



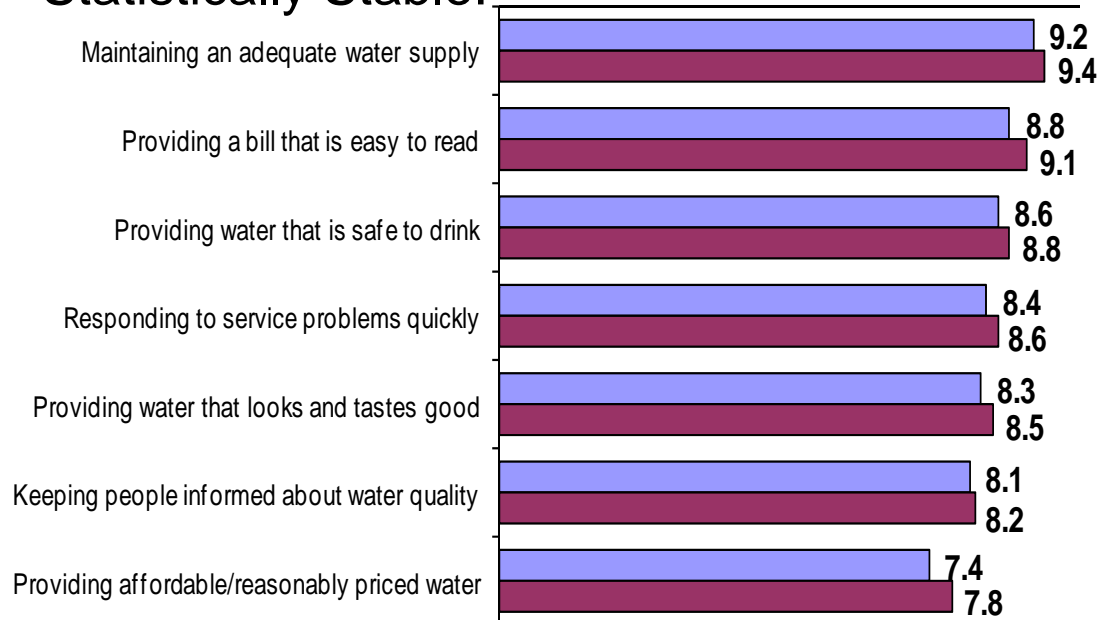
• In 2011, the favorable ratings were similar for commercial (88%) and residential (90%) respondents.

• Ratings for commercial respondents (with a smaller sample size) have been relatively stable over time.

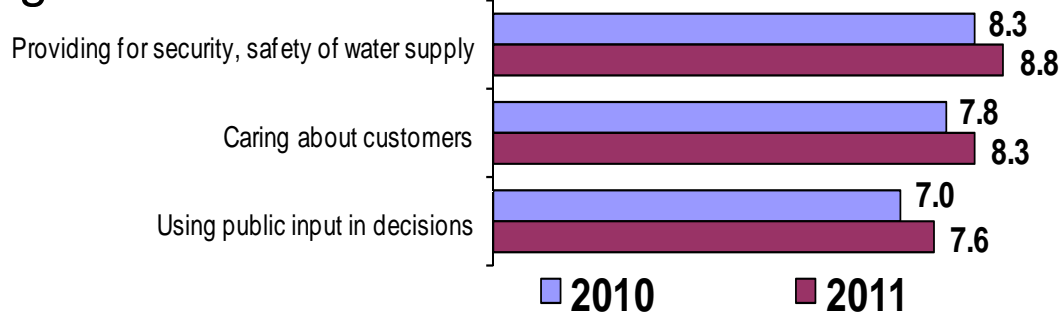
TMWA's 2010 and 2011 Performance

Scale from 0 "Very Poor Job" to 10 "Excellent Job"

Statistically Stable:



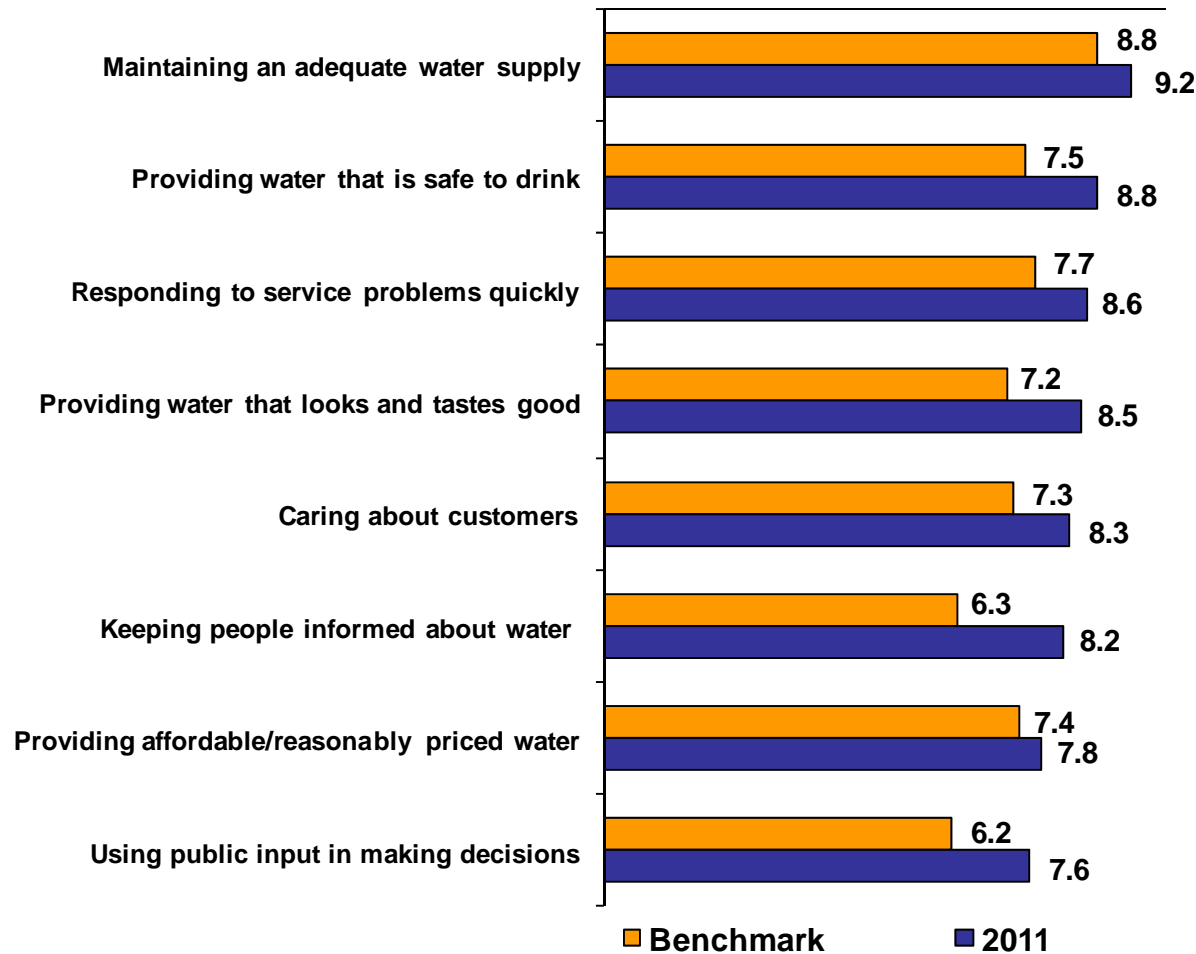
Significant Increases:



- Of the 10 performance measures:
 - The highest rated item continued to be maintaining an adequate water supply, and
 - The lowest continued to be using public input in decisions.

- From 2010 to 2011, ratings increased significantly for 3 items:
 - Security/safety of water,
 - Caring about customers,
 - Using public input.

TMWA's 2011 Performance Compared to National Benchmarks

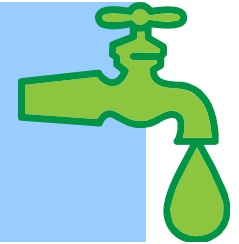


- In 2011, TMWA's score was comparable to the national benchmark for providing affordable, reasonably priced water.
- In 2011, TMWA scored **higher** than the benchmark on the other seven measures that had benchmarks.

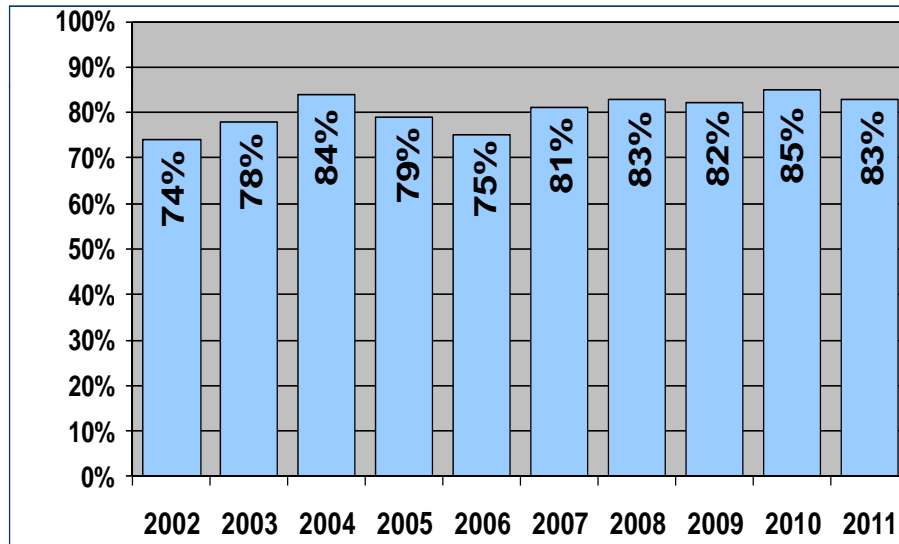
Scale from 0 (very poor job) to 10 (excellent job)

Benchmark Source: American Water Works Association Research Foundation

Drinking Water Quality 2011

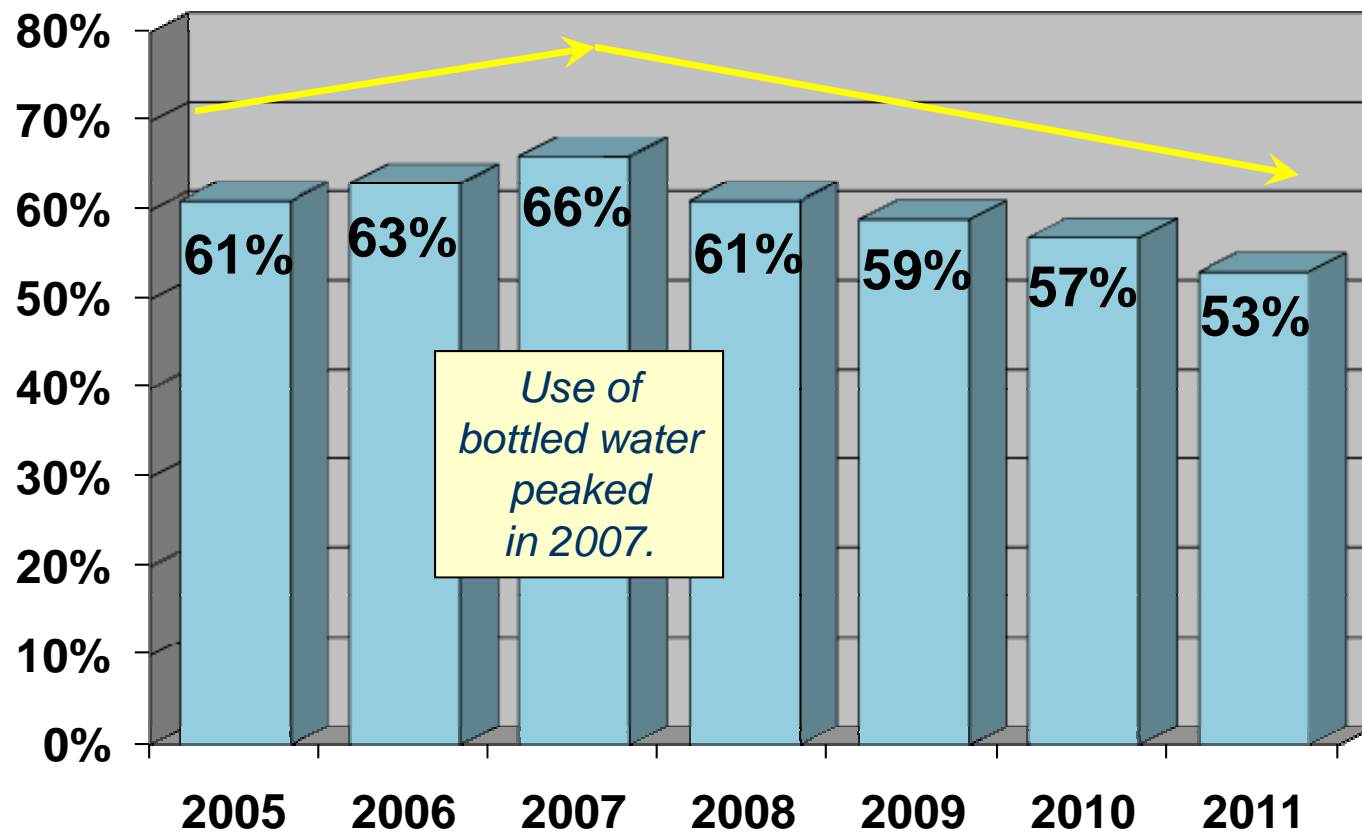


Respondents Who Rated Drinking Water Quality as Either Excellent or Good



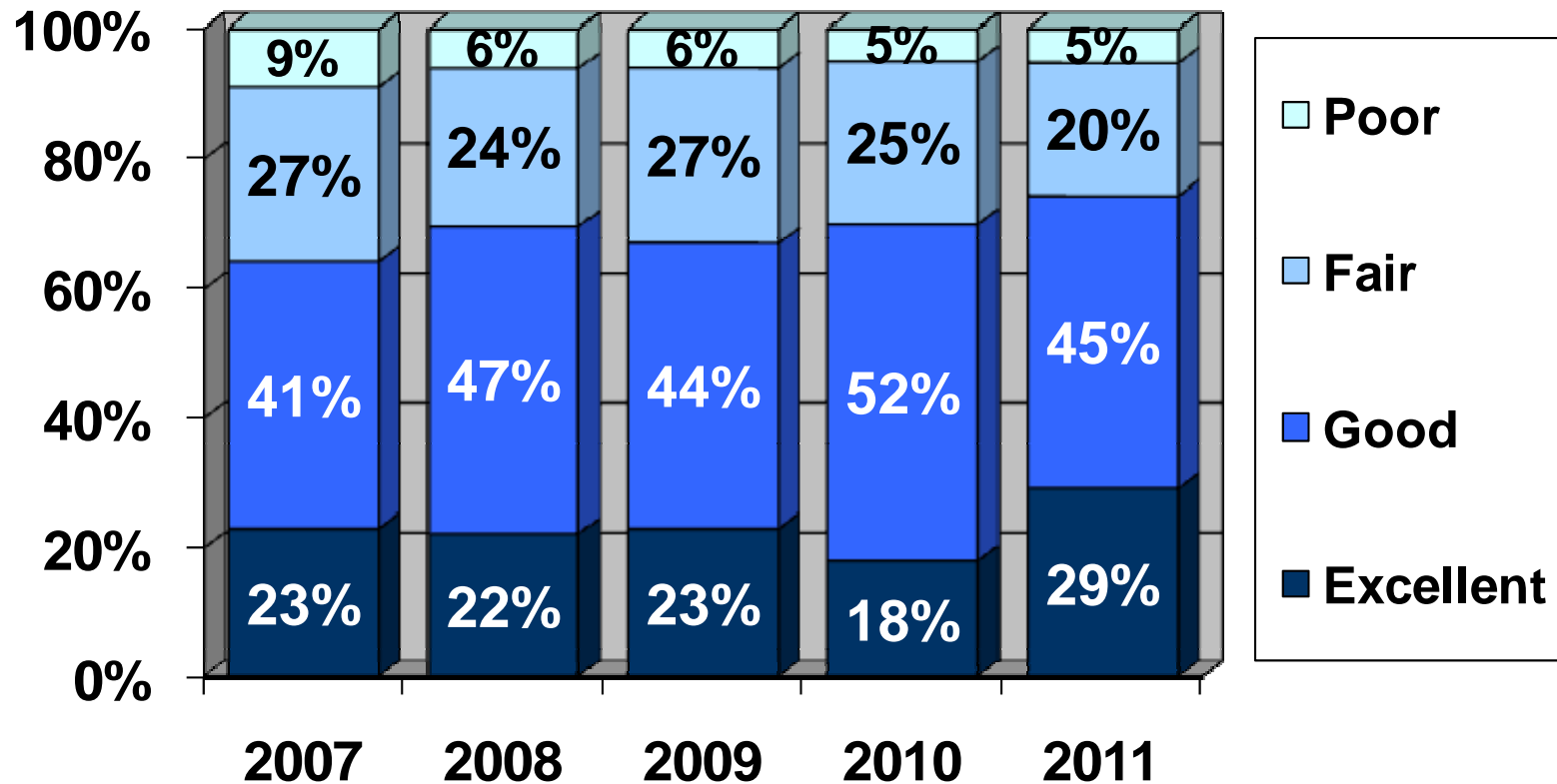
- In 2011, 83% rated drinking water quality as either excellent or good.
- Nearly all respondents (95%) noted no difference in water quality compared to one year ago; about 4% said it was better while only 1% said it was worse.
- More than half (57%) reported that the overall quality of their tap water was better than that of other cities; only 6% said it was worse.
- Three out of four (75%) reported rarely or never having problems with the taste of drinking water.
- Among those who did have a concern about drinking water quality, the two main issues were chemicals and/or the taste.

Use of Bottled Water 2005-2011



Price/Value 2007 - 2011

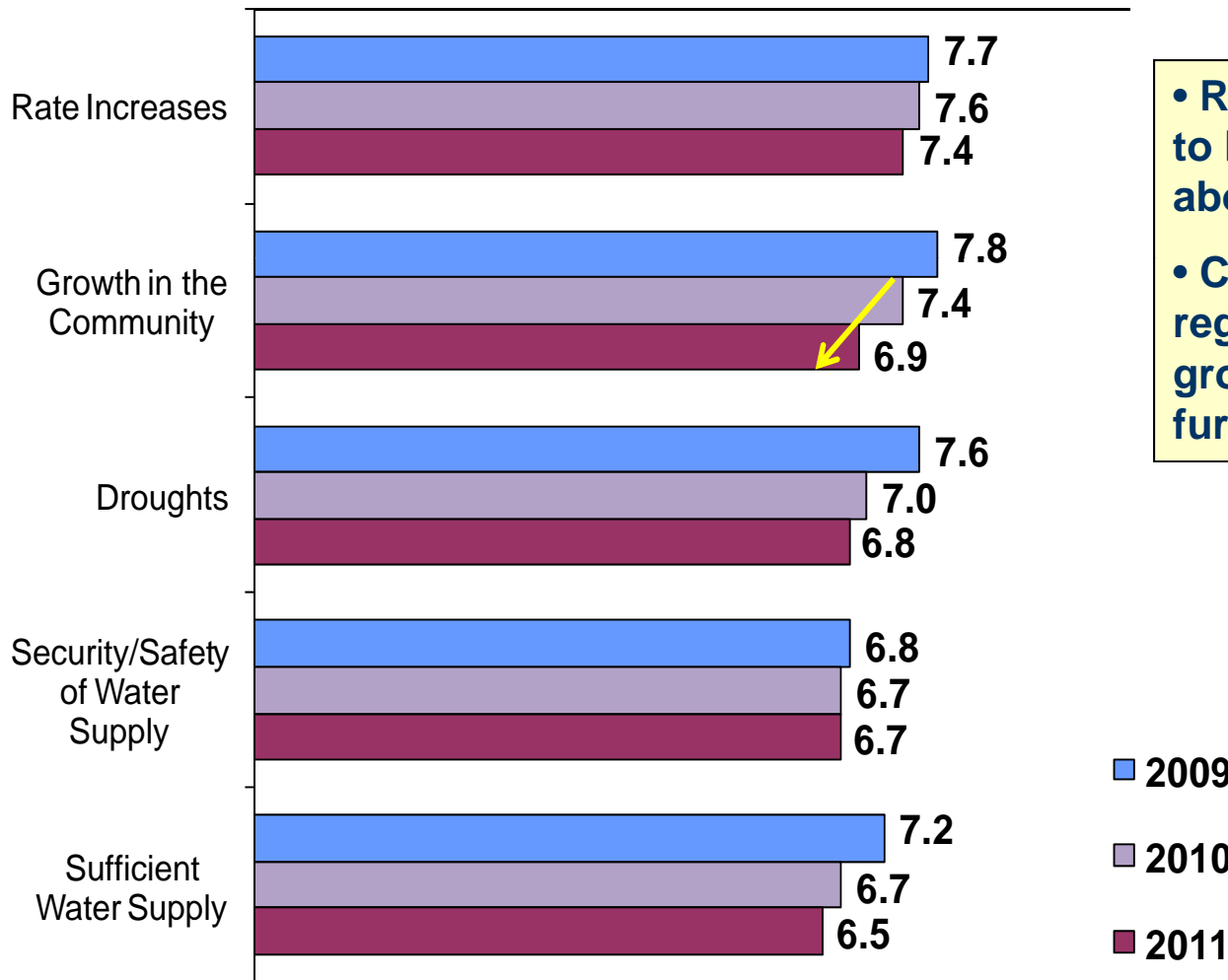
On Average, Price Paid for Quality of Water and Services Provided



The percentage of respondents who provided an “excellent” rating for value for price jumped from 18% in 2010 to 29% in 2011.

Potential Concerns 2009 - 2011

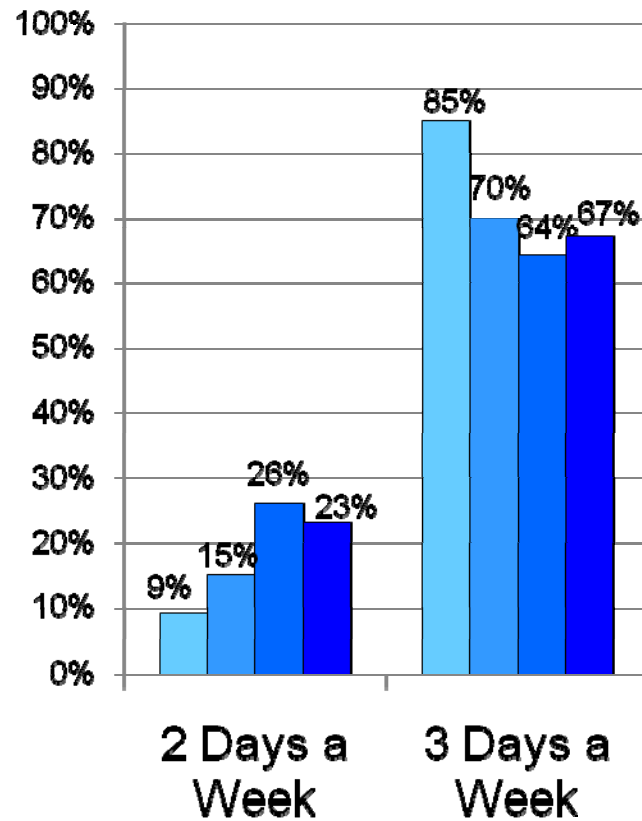
Scale from 0 "Not at All Concerned" to 10 "Very Concerned" on "How concerned you are with the following"



- Respondents continued to be most concerned about rate increases.
- Concern levels regarding community growth decreased even further in 2011.

Communication and Issue Awareness

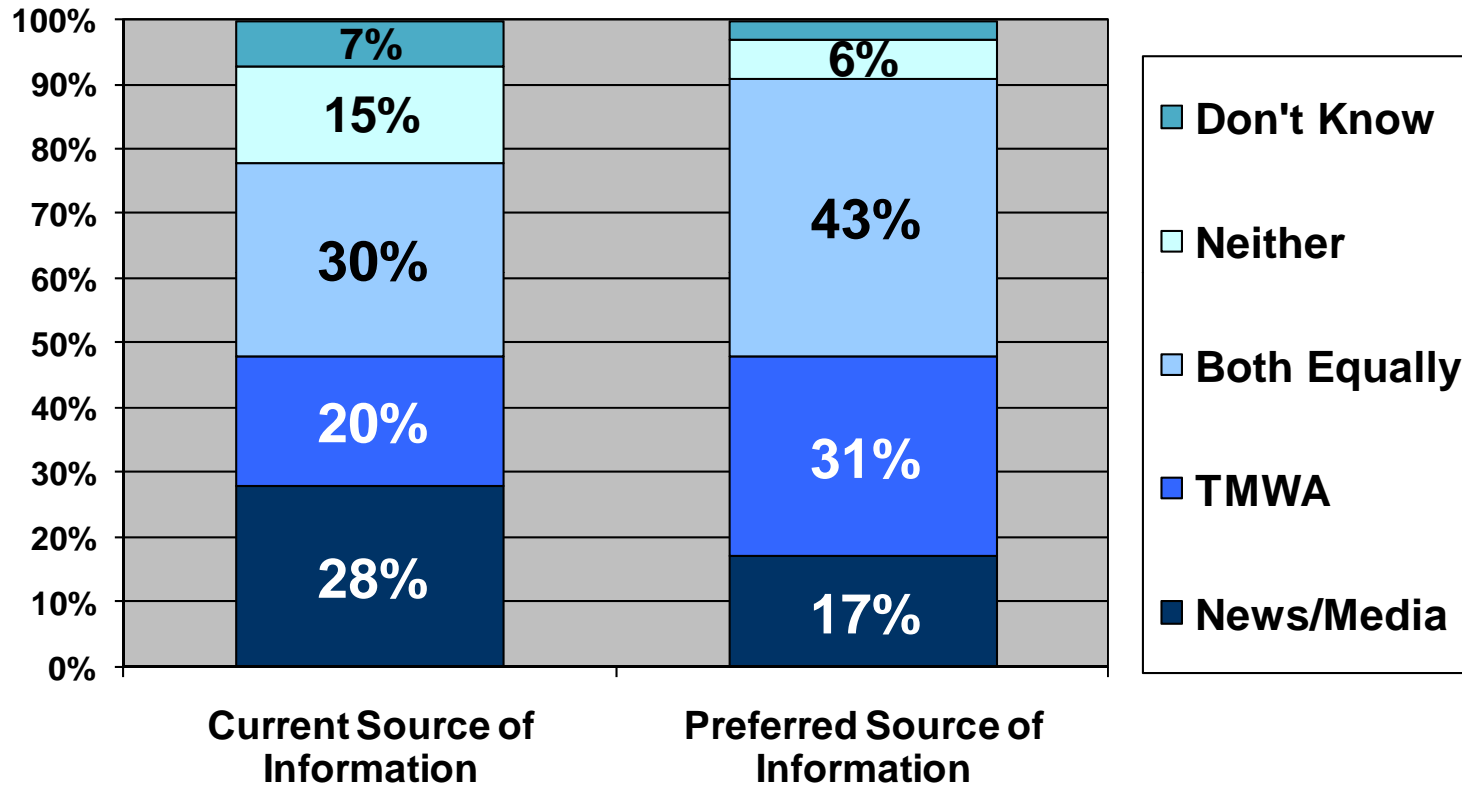
- 69% who paid by mail read the water bill insert at least occasionally.
- 64% read the message printed on the front page of their bill.
- 94% were aware of Assigned Day watering.
- Of those who were aware, 72% reported, correctly, that they can water up to 3 days a week.



TMWA enabled customers to water up to 3 days a week starting in April 2010; awareness was highest in the summer of 2010, but declined somewhat in subsequent quarters.

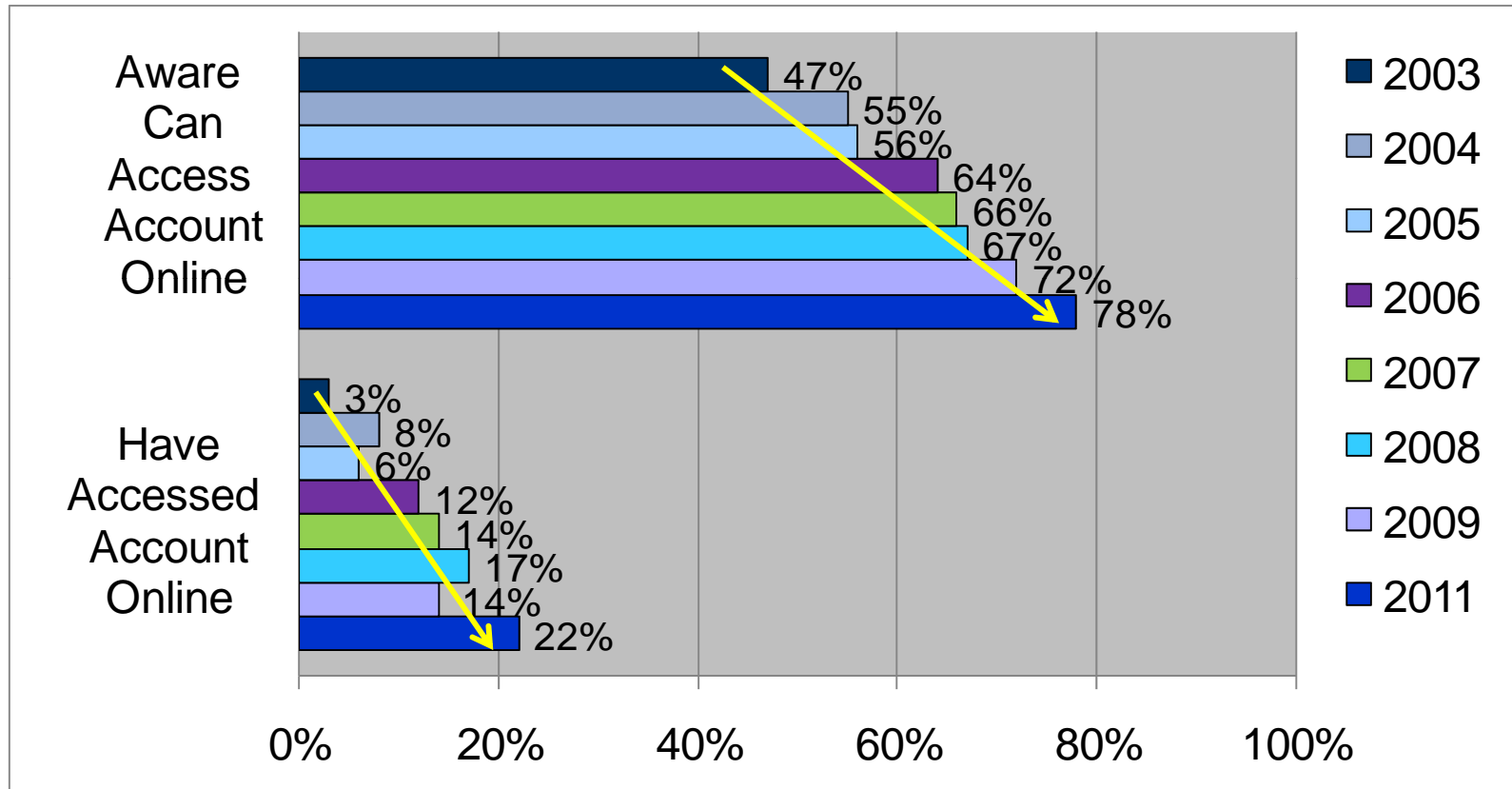
- Summer 2010
- Fall 2010
- Winter 2011
- Spring 2011

Primary Source of Information About Drinking Water - 2011



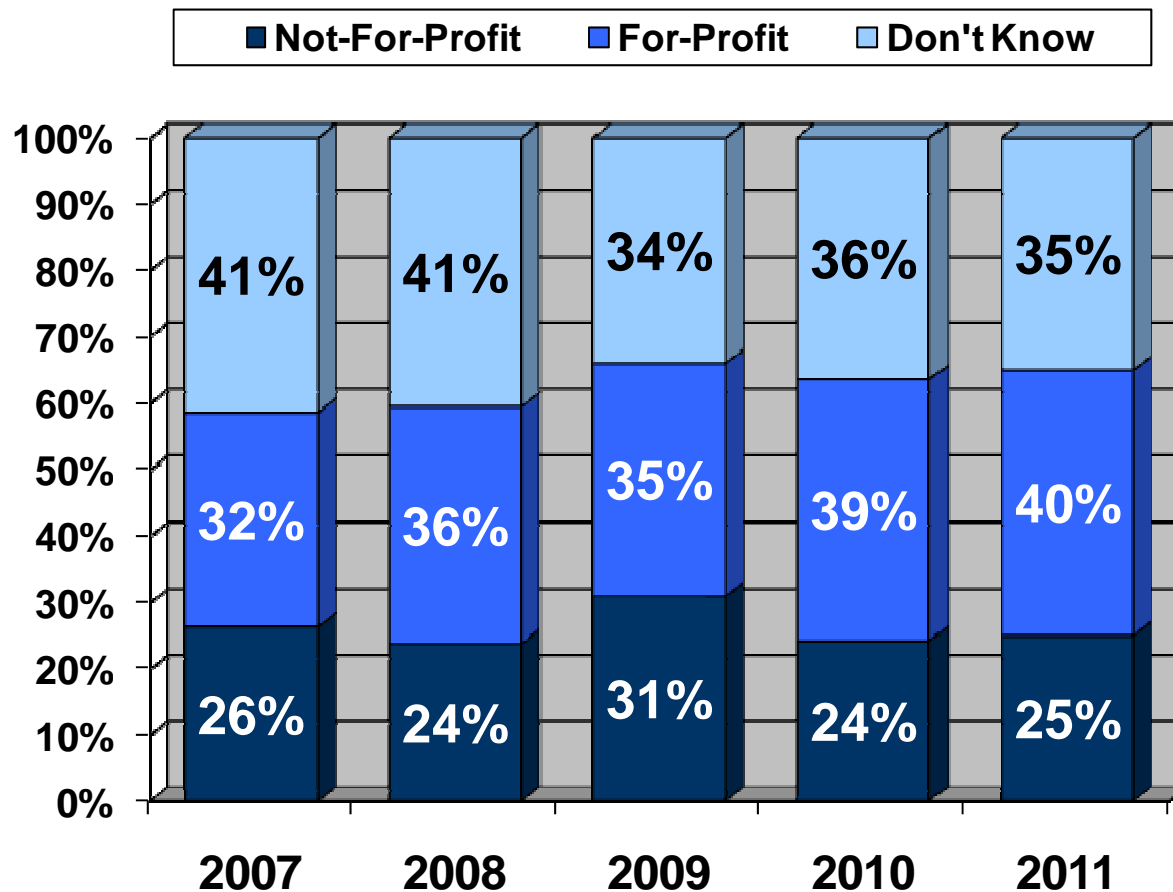
More respondents received most of their information about drinking water from the local news/media (28%) than TMWA (20%), although more respondents would prefer to receive most of this information from TMWA (31%) rather than the local news/media (17%).

TMWA Online Accounts 2003-2011



In 2010, 78% of respondents were aware they could access their TMWA accounts online; 22% actually did.

Awareness of Not-for-Profit Status 2007 - 2011

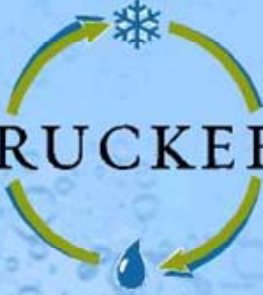


- One out of four respondents (25%) reported that TMWA is a not-for-profit utility, similar to 24% last year.
- Altogether 11% (2% unaided + 9% aided) were able to identify that elected officials from Washoe County, the City of Reno, and the City of Sparks provide oversight for TMWA.

In Summary: Connection to TMWA’s Corporate Goals and Communication Initiatives

Corporate Goals for Customer Satisfaction	
Residential: Achieve at least 71% favorable ratings; 82%-86% is “excellent” and over 86% is “outstanding”	In 2010, 89% favorable (“Outstanding”)
Commercial: Achieve at least 77% favorable ratings; 88%-90% is “excellent” and over 90% is “outstanding”	In 2010, 88% favorable (“Excellent”)

Communication Initiatives	
Increase awareness of <u>value</u>	Increased. In 2011, 29% rated value for price as excellent, up from 18% in 2010.
Increase awareness of <u>water quality</u>	Stable. In 2011, 83% rated water quality as excellent or good, similar to 85% in 2010.
Increase awareness of <u>not-for-profit status</u>	Stable. In 2010, 25% said that TMWA was a not-for-profit entity, similar to 24% in 2010.
Increase awareness of opportunities for <u>public input</u> in decision making	Increased. In 2011, the mean rating for using public input was 7.6, up from 7.0 in 2010.



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2011

Customer Satisfaction Study

