

Survey Purpose & Methodology

Purpose:

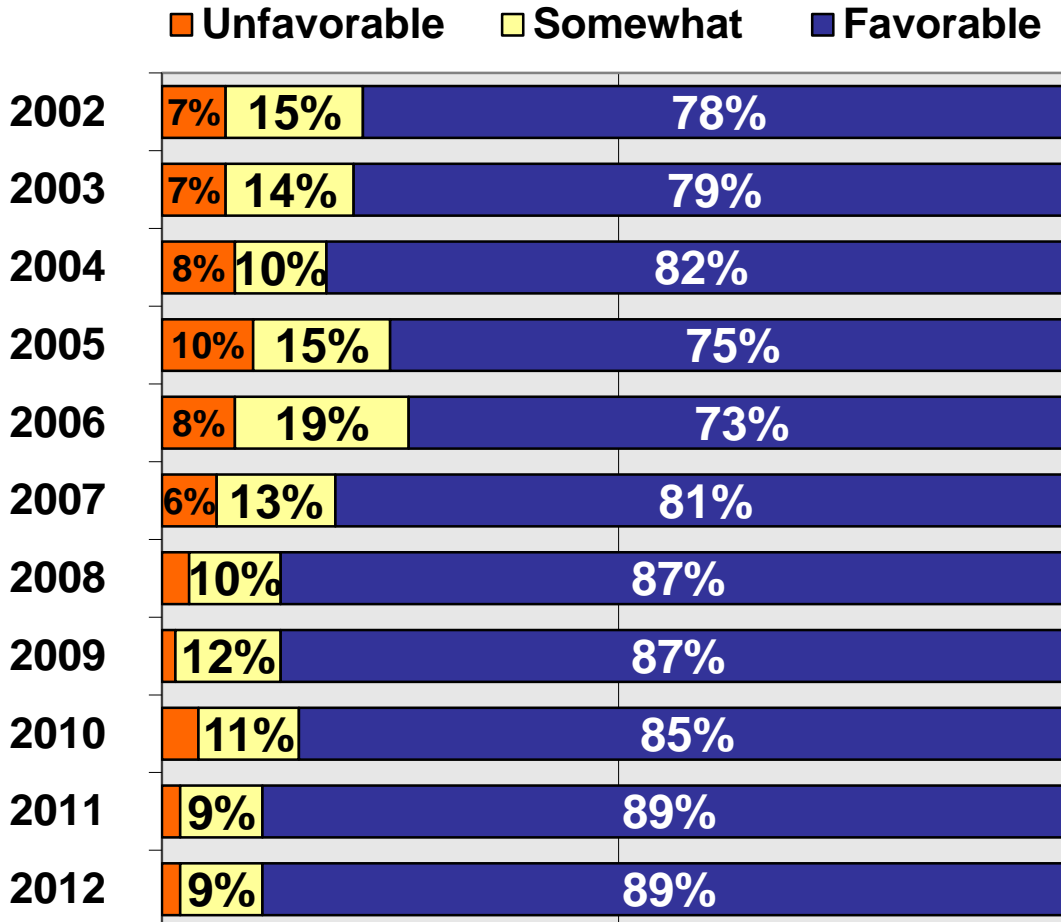
- To assess TMWA customers' overall level of satisfaction and attitudes toward water-related issues including quality, sufficiency, and security
- To identify significant differences between customer groups
- To identify trends since 2002 (over an 11 year time period)

2012 Methodology:

- Same methodology and questionnaire as in 2011
- Telephone Survey conducted by InfoSearch International
- In the field from July 2011 to June 2012; interviews averaged 8-12 minutes
- Sample of 500: 400 Residential and 100 Commercial Customers
- Overall 95% confidence level, sampling error of $\pm 4.4\%$

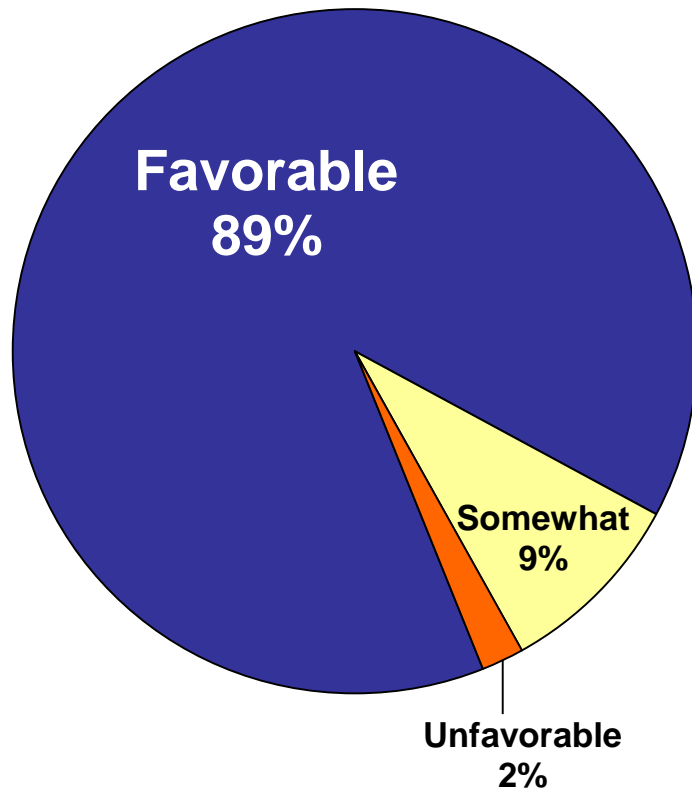
Overall Customer Satisfaction

2002 - 2012



- From 2002 to 2007, overall satisfaction ratings ranged from 73% to 82% favorable; since 2008, the favorable ratings have been at 85% or higher.
- The favorable ratings were the same in 2011 and 2012.

Overall Customer Satisfaction With Sample Comments - 2012



- **Favorable (89%)**

- *“I think you are doing a great job.”*
- *“I’m very happy with TMWA’s service.”*
- *“Keep doing what you’re doing.”*
- *“I’m totally happy with them.”*
- *“The water here is a good quality.”*
- *“I am very satisfied with them.”*
- *“Thank you for your hard work.”*

- **Somewhat (9%)**

- *“Make the water taste better.”*
- *“Improve their online bill payment system.”*

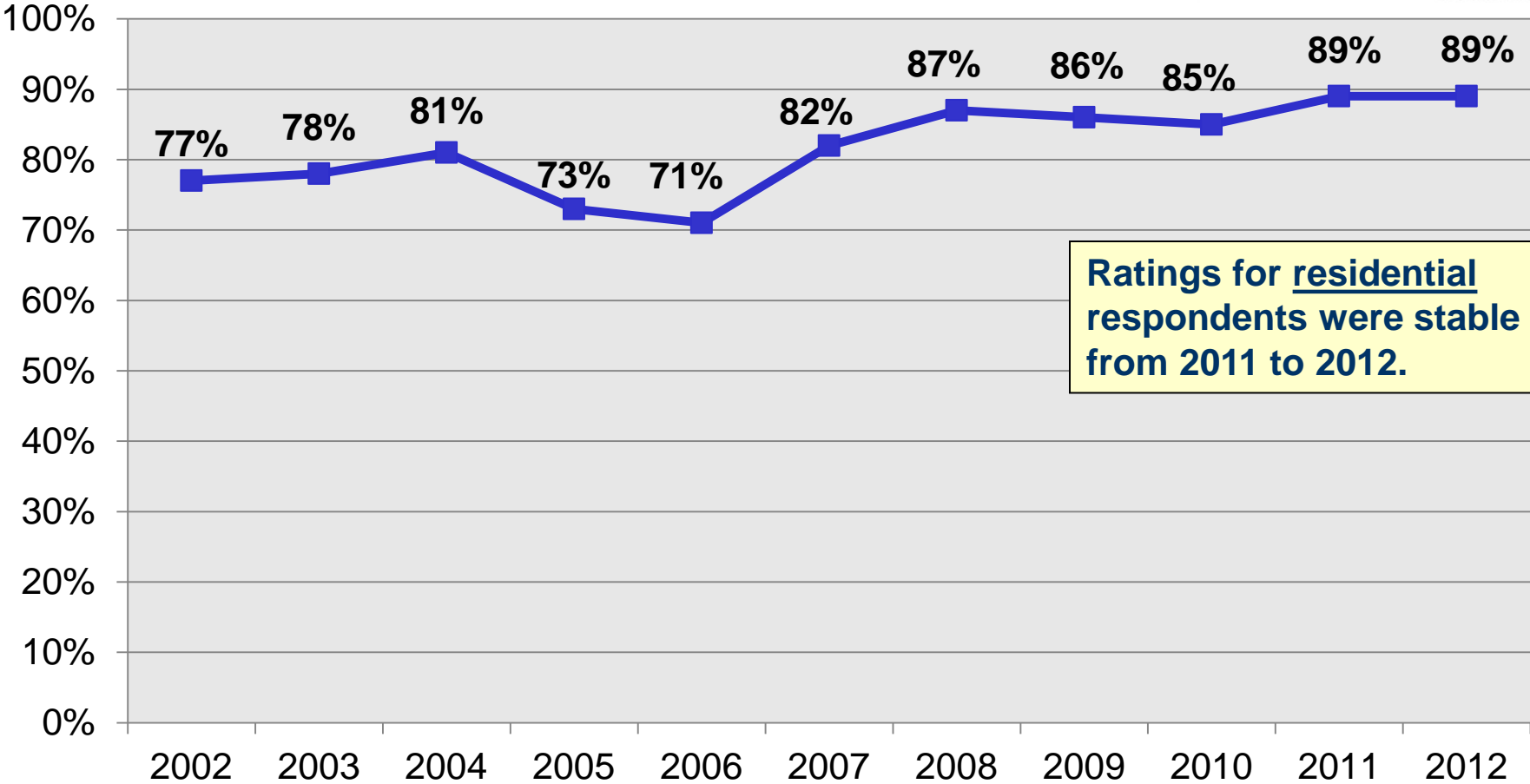
- **Unfavorable (2%)**

- *“It took six hours for them to get here.”*
- *“We had an issue with electronic payments.”*

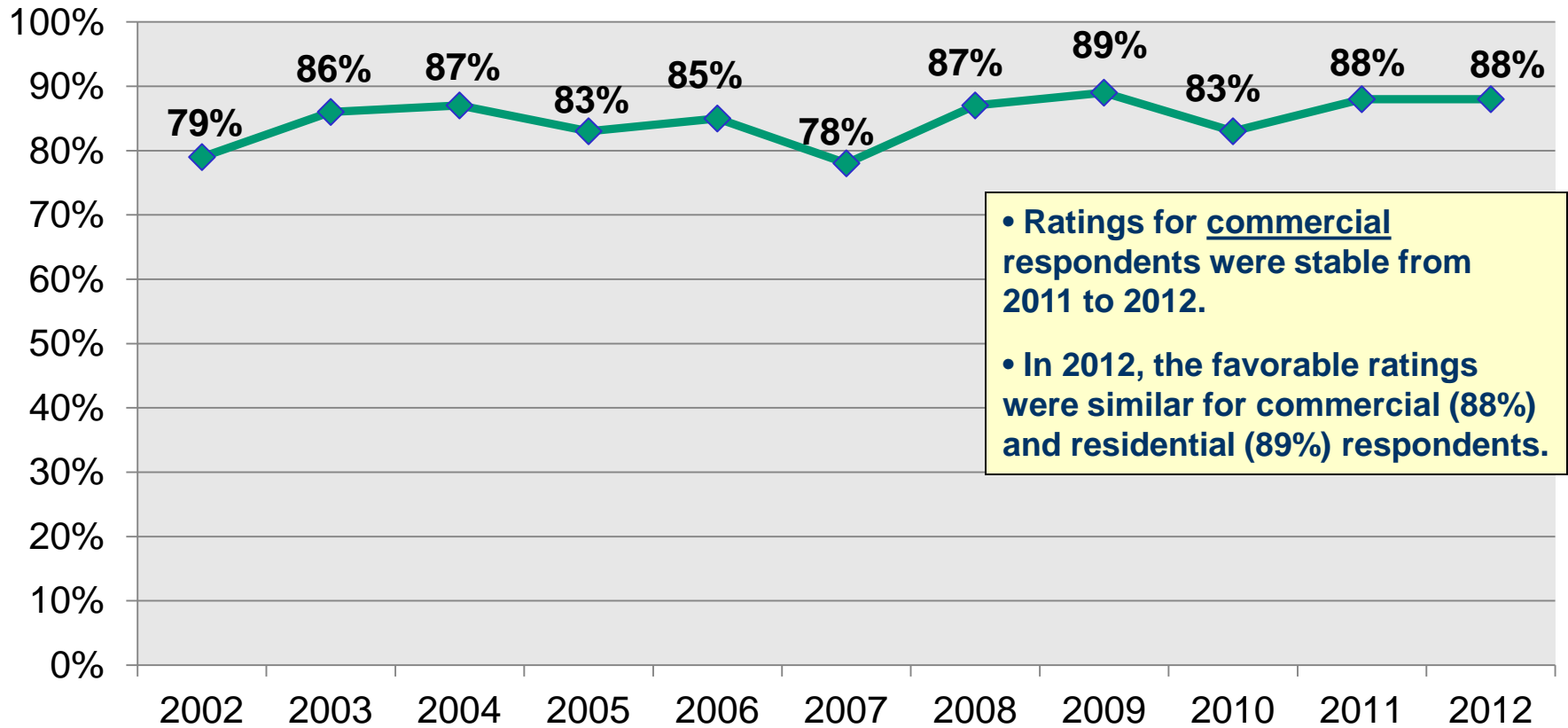
Overall Satisfaction Among Residential Respondents 2002 - 2012



dreamstime.com

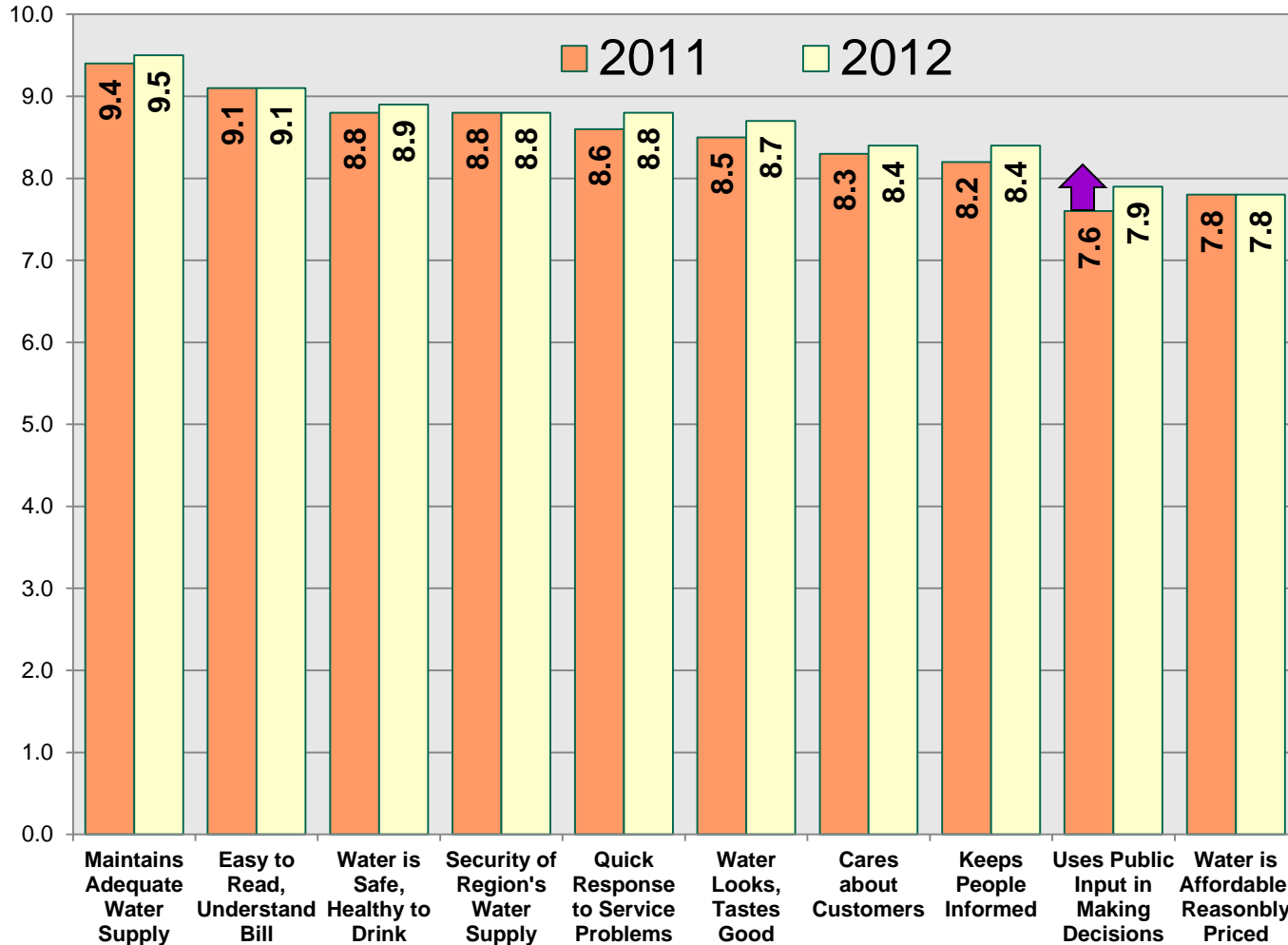


Overall Satisfaction Among Commercial Respondents 2002 - 2012



TMWA's Performance 2011 - 2012

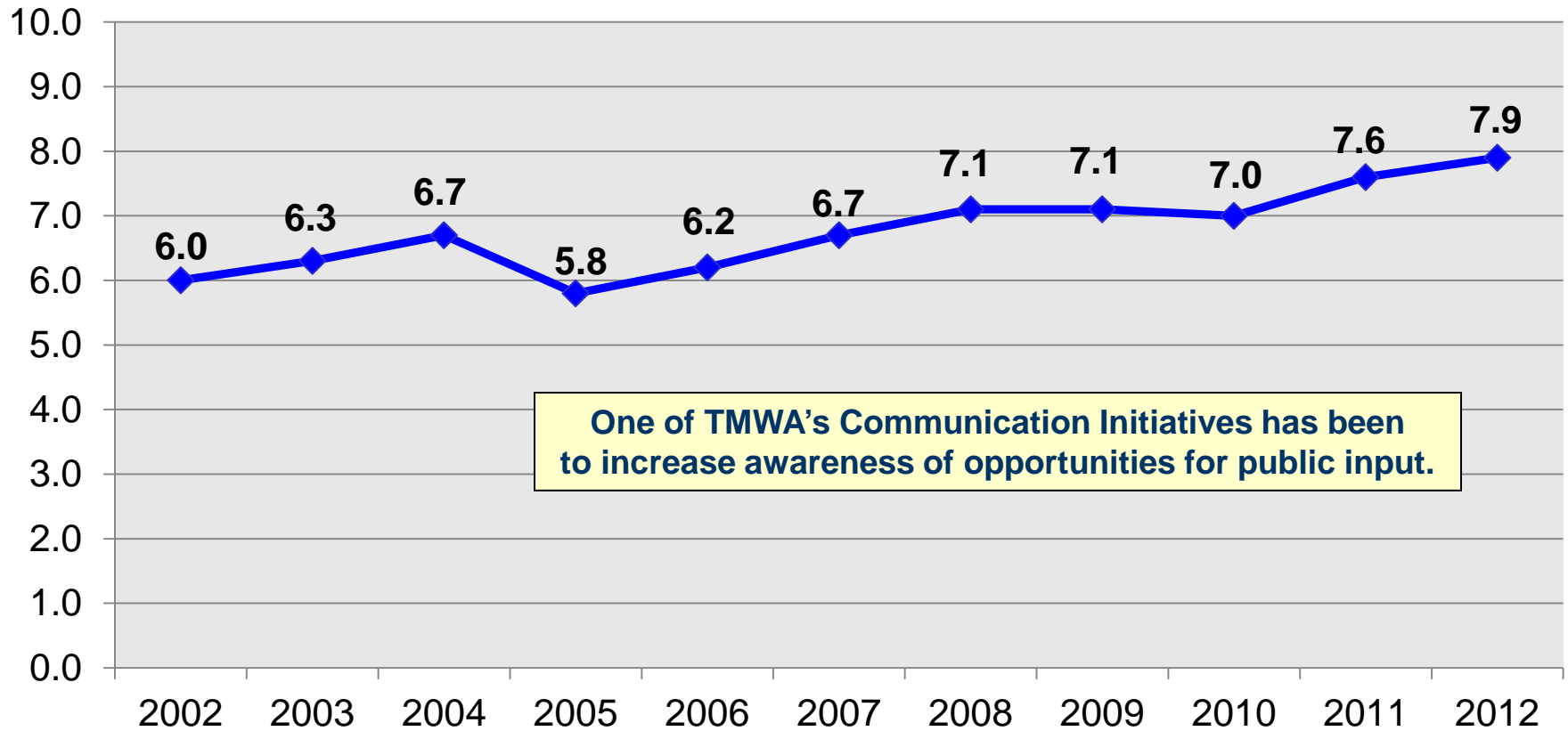
Scale from 0 "Very Poor Job" to 10 "Excellent Job"



In 2012 :

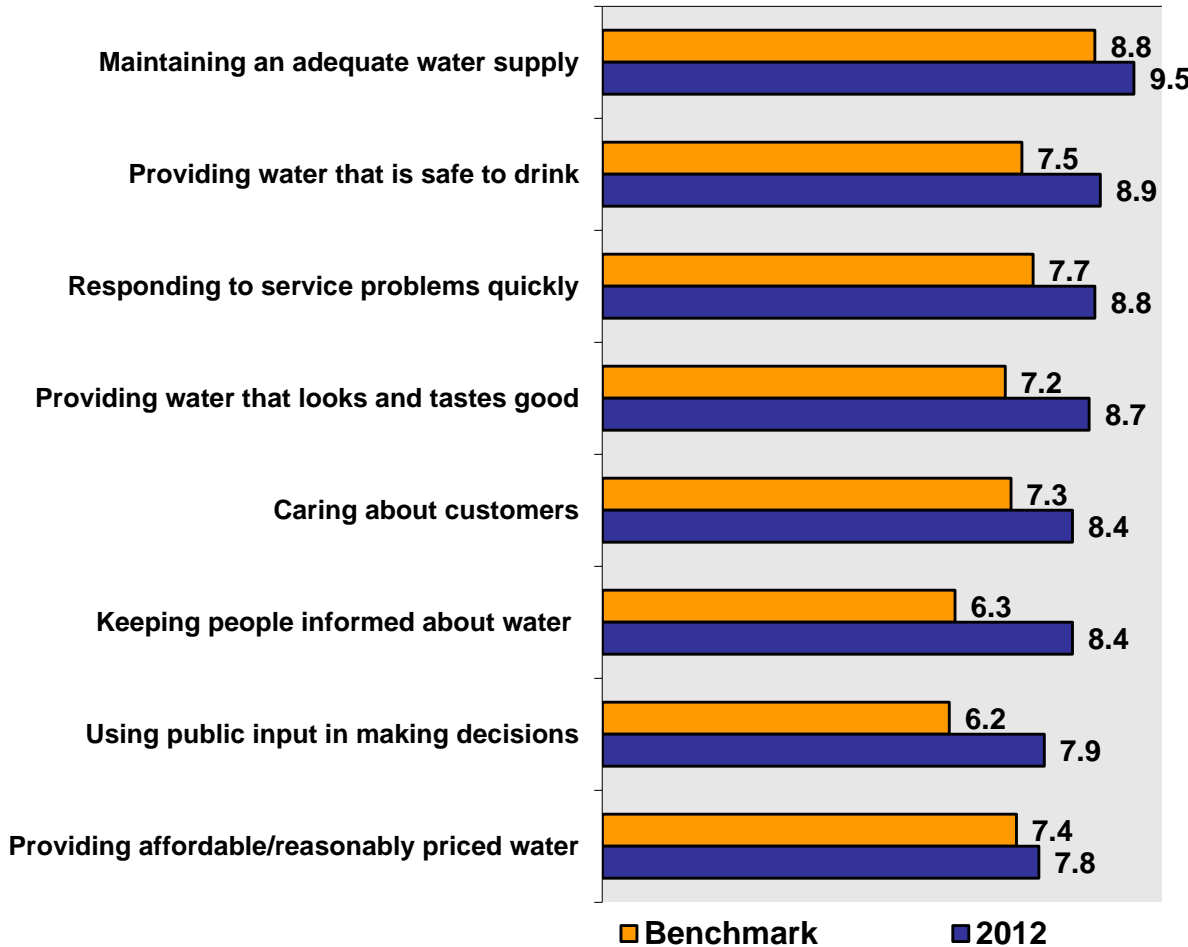
- All 10 performance measures had a mean of 7.8 or higher on a scale from 0 to 10.
- The highest rated item was maintaining an adequate water supply.
- The lowest rated item was providing water that is affordable and reasonably priced.
- Only one rating changed significantly from 2011: "Using public input in making water related decisions."

Long-Term Ratings Trend for “Using Public Input in Making Decisions” 2002 - 2012



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

TMWA's 2012 Performance Compared to National Benchmarks

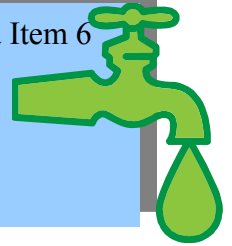


- In 2012, TMWA's score was comparable to the national benchmark for providing affordable, reasonably priced water.

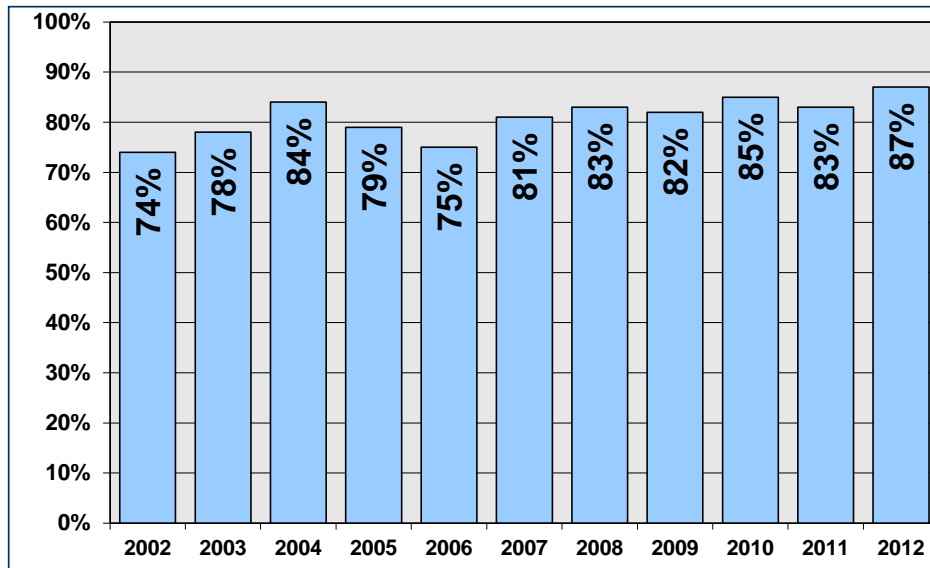
- In 2012, TMWA scored **higher** than the benchmark on the other seven measures that had benchmarks.

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

Drinking Water Quality 2012

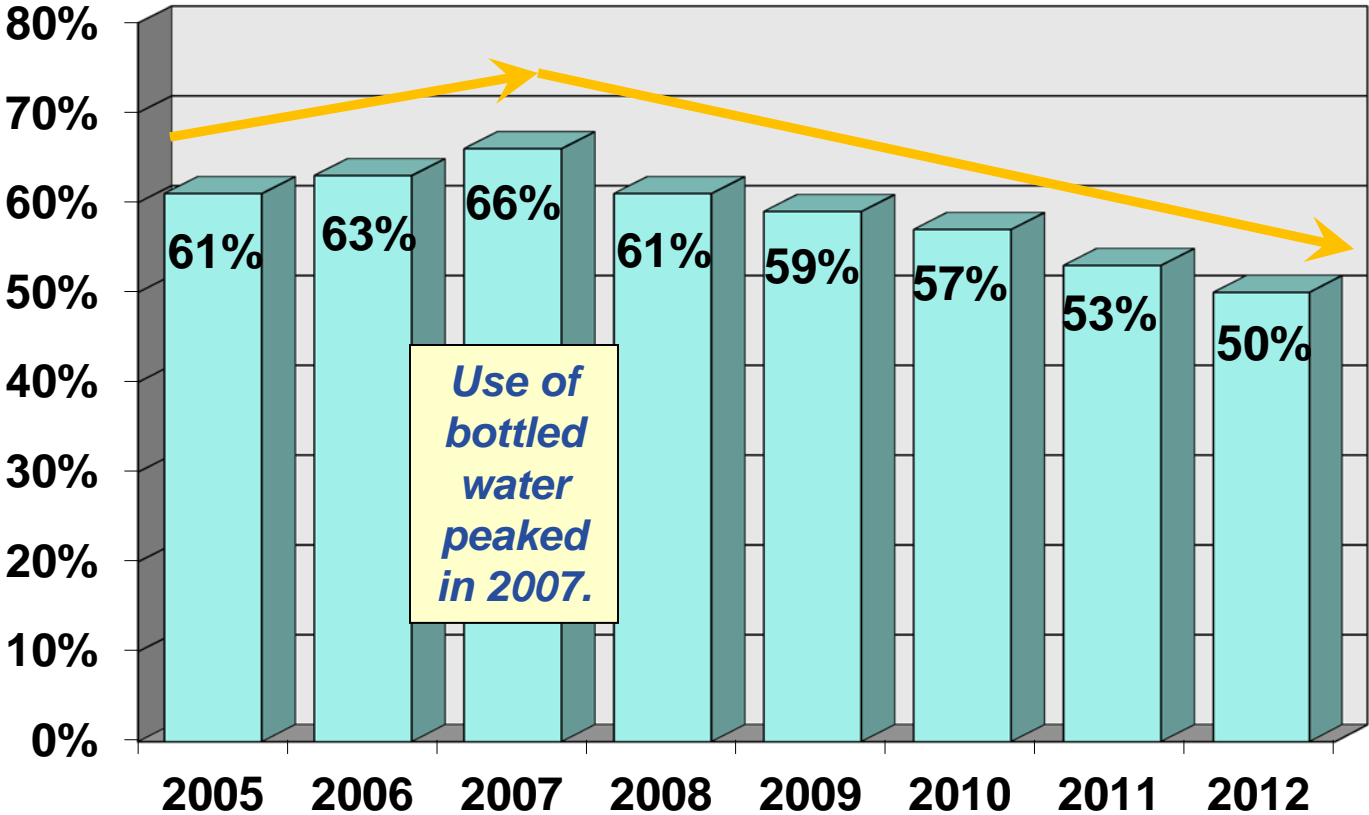


Respondents Who Rated Drinking Water Quality as Either Excellent or Good



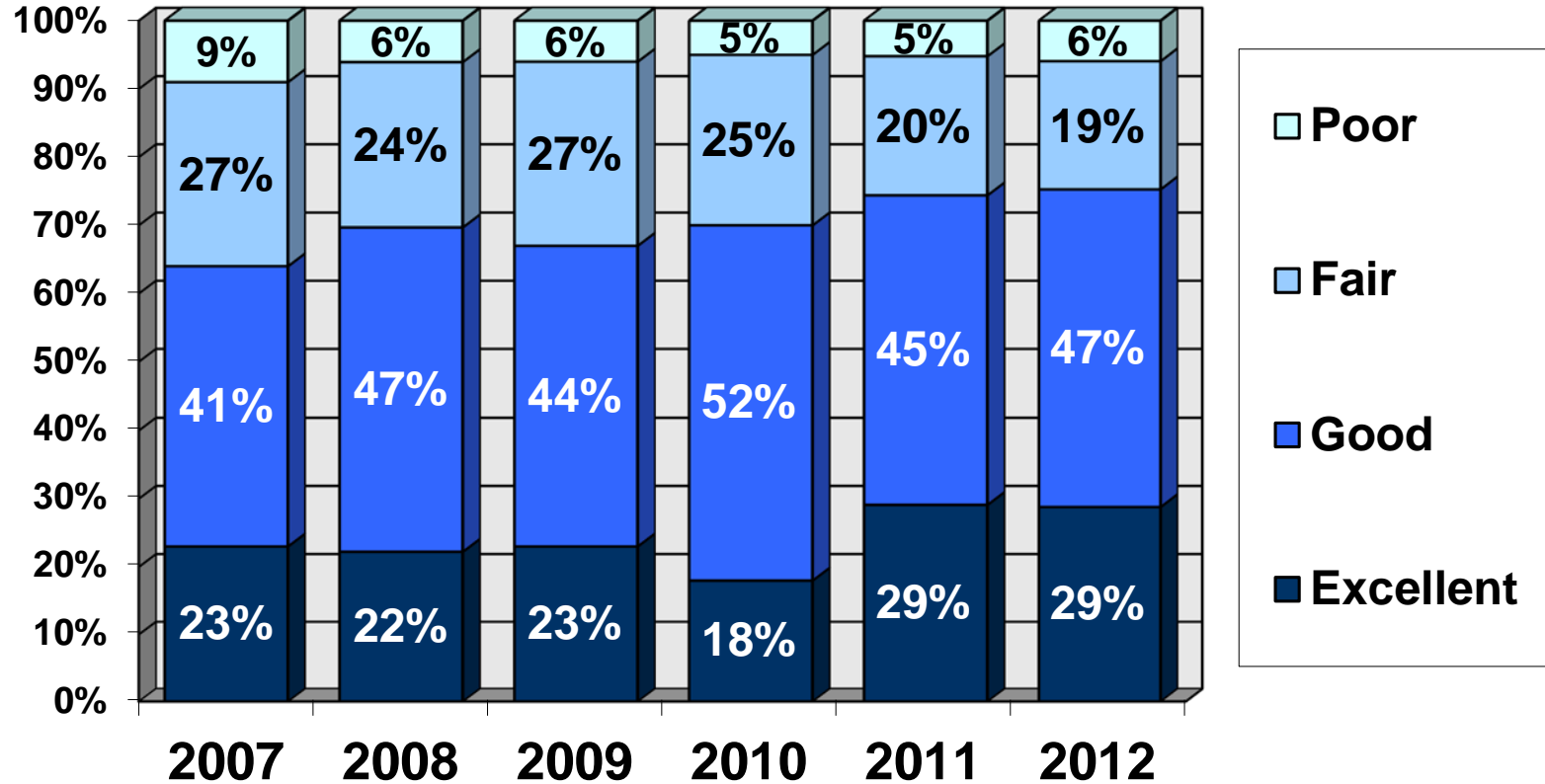
- In 2012, 87% rated drinking water quality as either excellent or good; this was the highest rating to date.
- Nearly all respondents (91%) noted no difference in water quality as compared to one year ago; about 7% said it was better while only 2% said it was worse.
- Three out of five (62%) reported that the overall quality of their tap water was better than that of other cities, up from 57% in 2011; only 7% said it was worse.
- Four out of five (81%) reported rarely or never having problems with the taste of drinking water, up from 75% in 2011.
- Among those who did have a concern about drinking water quality, the two main issues continued to be related to chemicals and/or the taste.

Use of Bottled Water 2005 - 2012



Price/Value 2007 - 2012

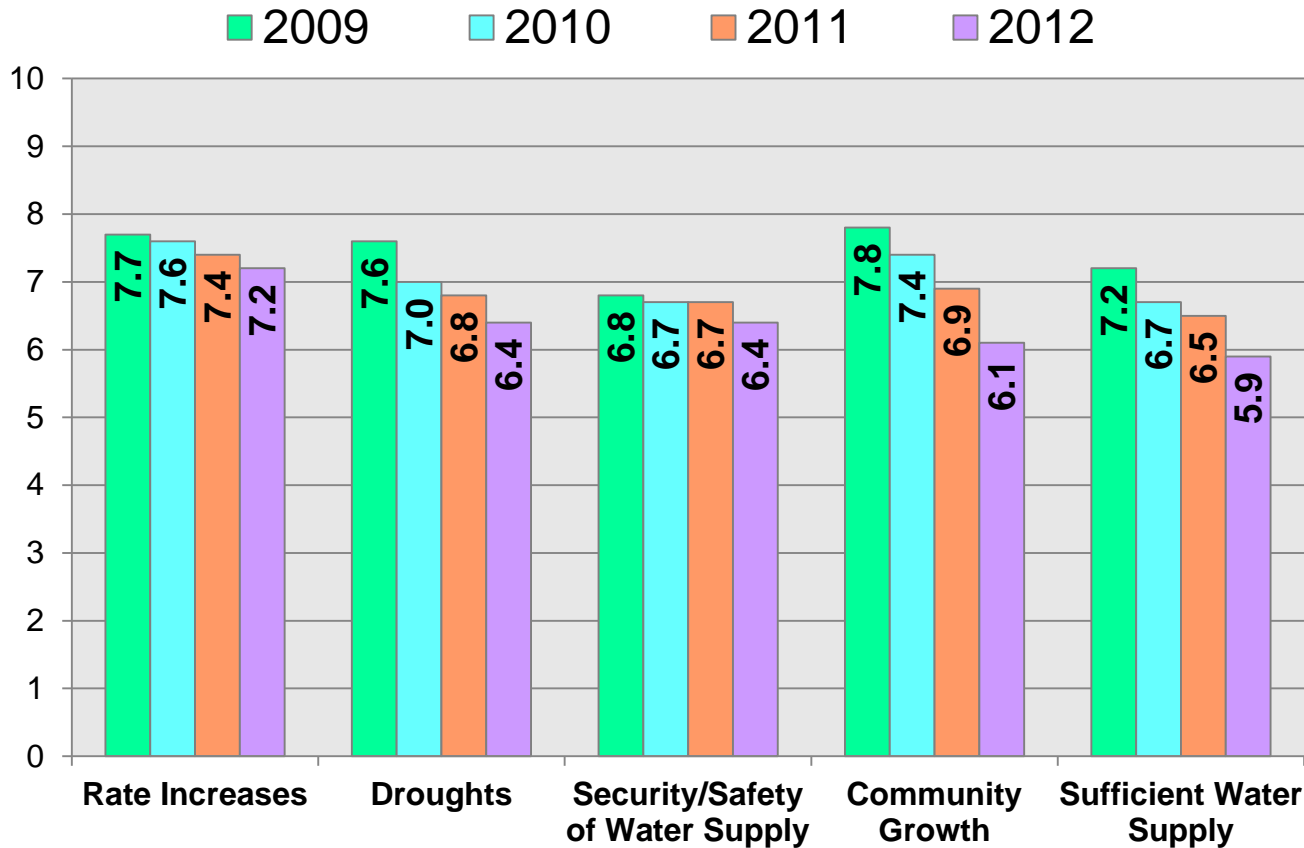
On Average, Price Paid for Quality of Water and Services Provided



Overall, 29% of respondents provided an “excellent” rating for value for price in both 2011 and 2012.

Potential Concerns 2009 - 2012

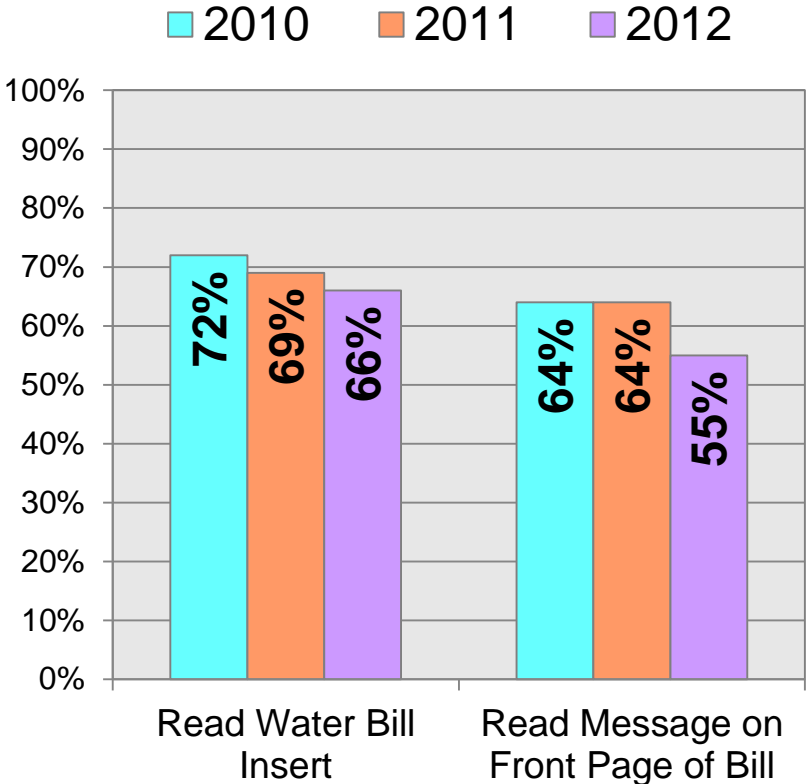
Scale from 0 "Not at All Concerned" to 10 "Very Concerned" on "How concerned you are with the following"



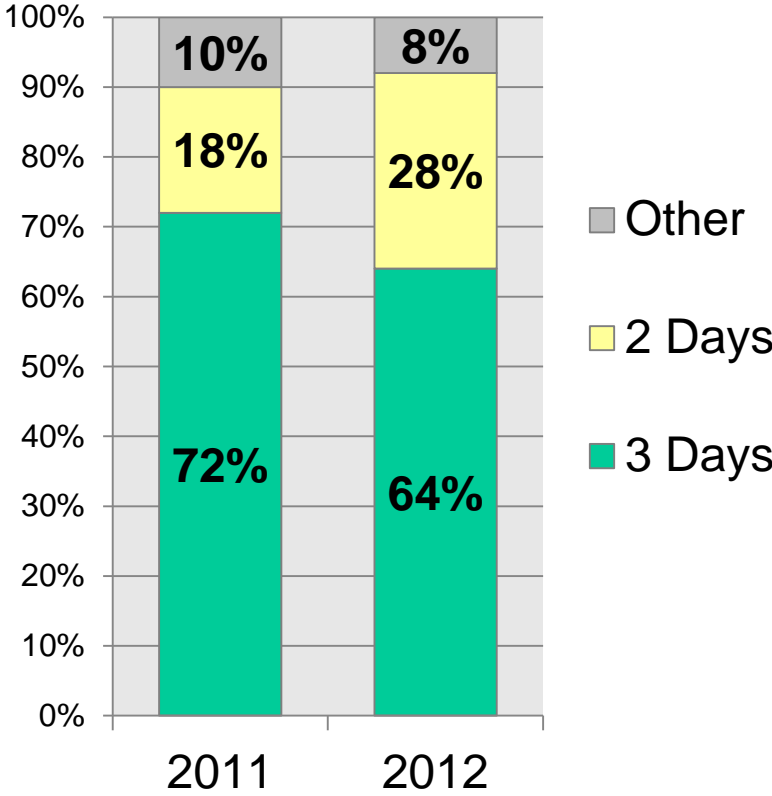
- Of the 5 issues measured, respondents were the most concerned about rate increases, although the level of concern has gradually declined from 2009.
- Concern levels regarding droughts, community growth, and a sufficient water supply decreased even further in 2012.

Communication and Issue Awareness

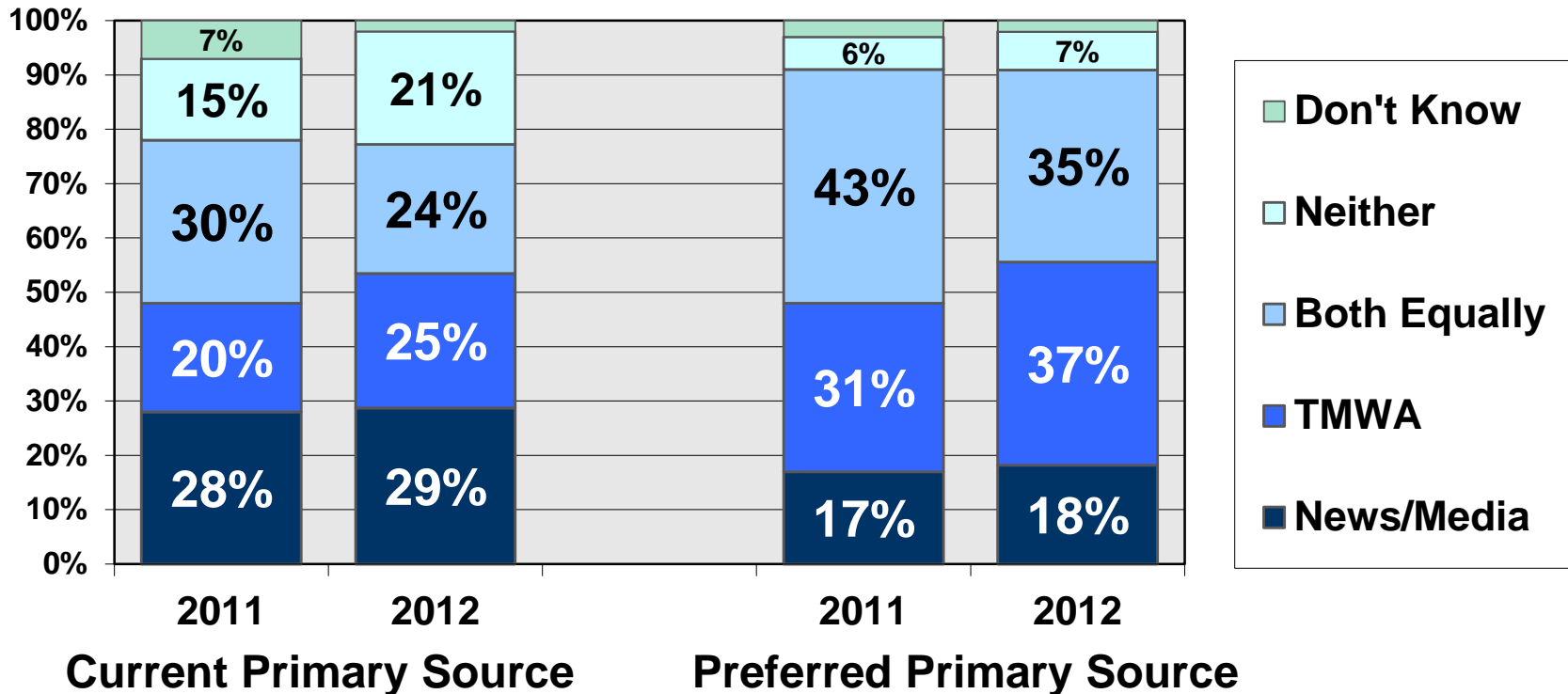
If Pay By Mail, Attention to Written Messages on Water Bill



Number of Days Per Week Can Water Yard with Assigned Days



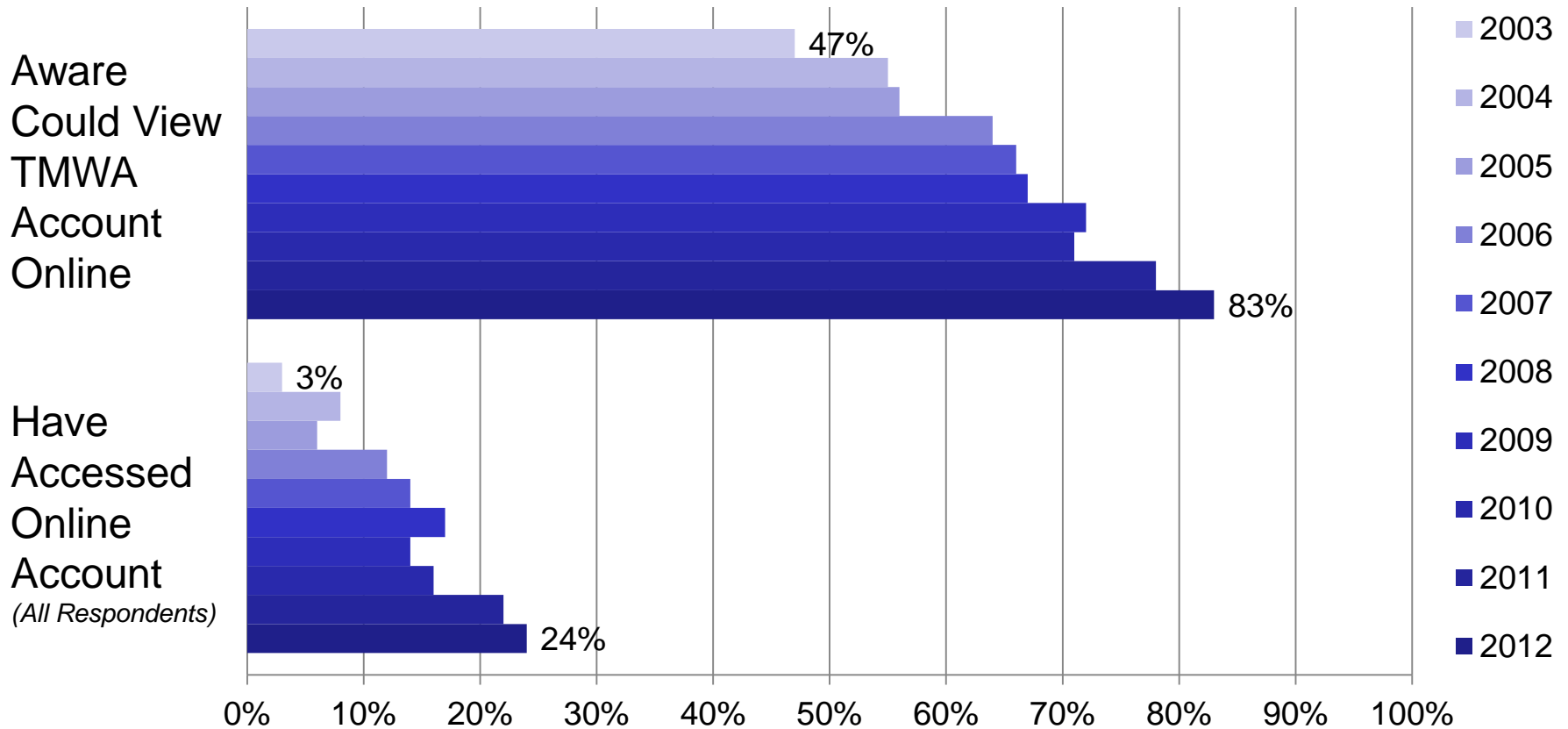
Primary Source of Information About Drinking Water 2011 - 2012



- In 2012, more respondents received information about drinking water from the local news/media (29%) than from TMWA (25%), although more respondents would prefer to receive this information from TMWA (37%) than the local news/media (18%).
- The percentage who would prefer to get this information from TMWA increased from 31% in 2011 to 37% in 2012.

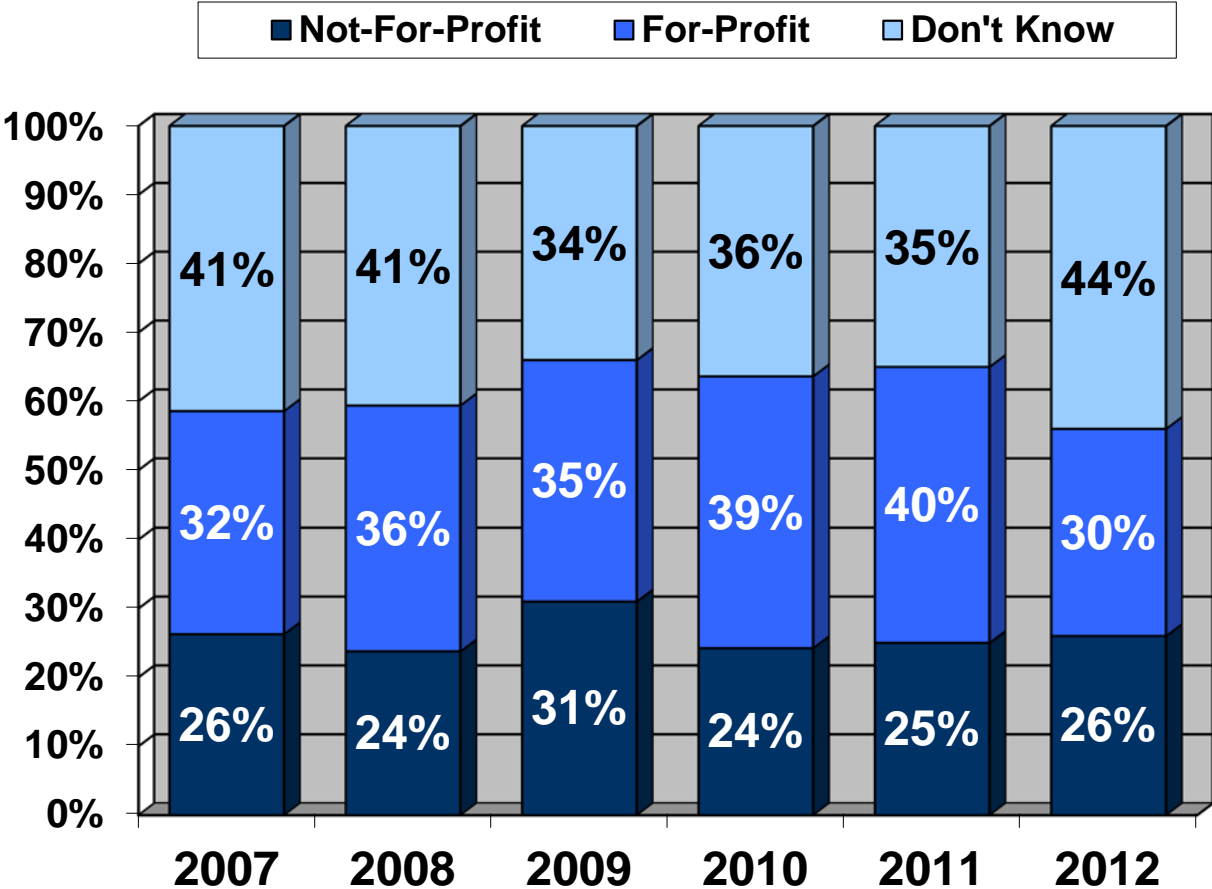


TMWA Online Accounts 2003 - 2012



In 2012, 83% of respondents were aware they could access their TMWA accounts online, up from 76% in 2011. Additionally, 24% have accessed their online account, up from 22% in 2011.

Awareness of Not-for-Profit Status 2007 - 2012



- One out of four respondents (26%) reported that TMWA is a not-for-profit utility.
- The main shift in perception from 2011 to 2012 was from “for-profit” to “don’t know.”
- Altogether 13% (2% *unaided* + 11% *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	
<p><u>Residential:</u> Achieve at least 71% favorable ratings; 82%-86% is "excellent" and over 86% is "outstanding"</p>	<p>In 2012, 89% favorable ("Outstanding")</p>
<p><u>Commercial:</u> Achieve at least 77% favorable ratings; 88%-90% is "excellent" and over 90% is "outstanding"</p>	<p>In 2012, 88% favorable ("Excellent")</p>

Communication Initiatives	
<p>Increase awareness of <u>value</u></p>	<p>Stable. In 2012, 29% rated value for price as excellent, the same as in 2011.</p>
<p>Increase awareness of <u>water quality</u></p>	<p>Increased. In 2012, 81% reported rarely or never having problems with drinking water taste, up from 75% in 2011.</p>
<p>Increase awareness of <u>not-for-profit status</u></p>	<p>Stable. In 2012, 26% said that TMWA was a not-for-profit entity, similar to 25% in 2011.</p>
<p>Increase awareness of opportunities for <u>public input</u> in decision making</p>	<p>Increased. In 2012, the mean rating for using public input was 7.9, up from 7.6 in 2011 and 7.0 in 2010.</p>



TRUCKEE MEADOWS WATER
A U T H O R I T Y

2012

Customer Satisfaction Study

