



TRUCKEE MEADOWS WATER
AUTHORITY

2014

Customer Satisfaction



Survey Purpose & Methodology

Fiscal Year 2014



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 (13 annual studies to date)

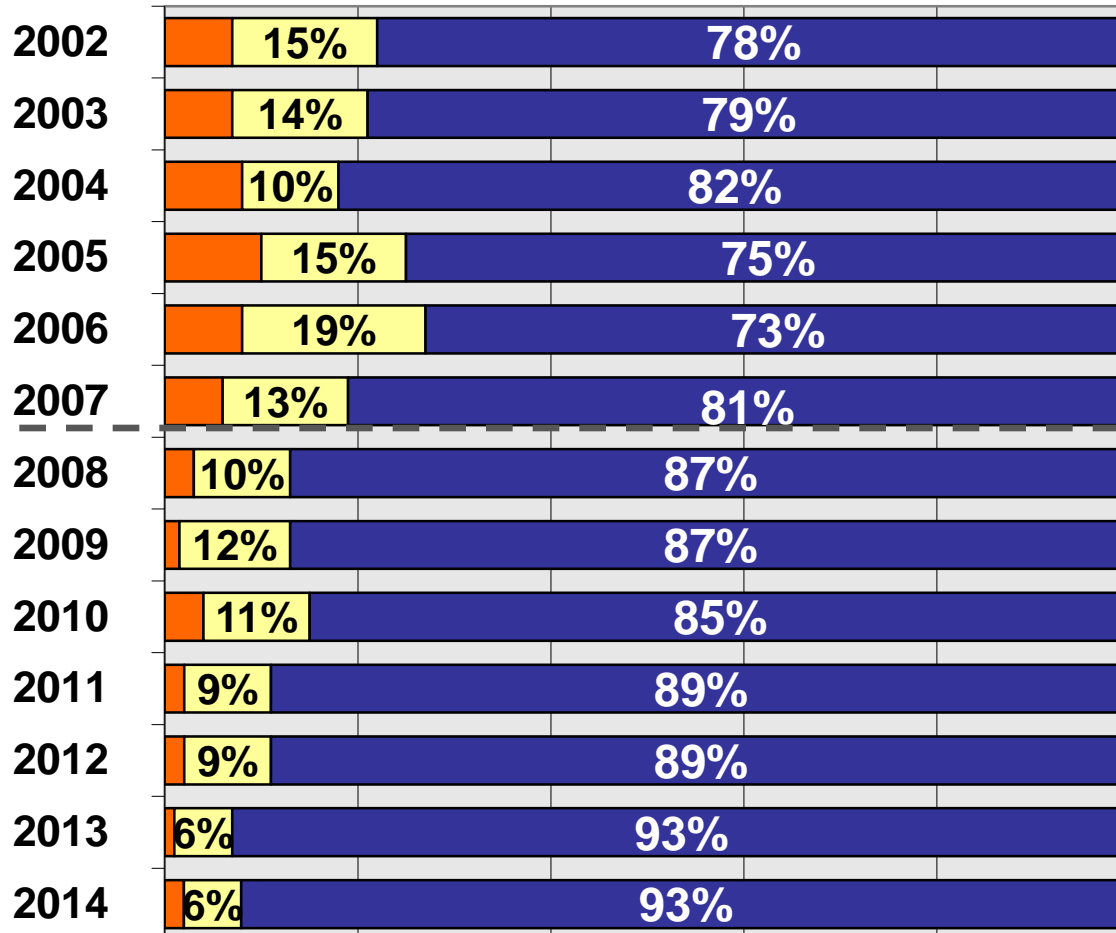
2014 Methodology:

- Telephone surveys managed by InfoSearch International
- In the field from July 2013 to June 2014; interviews averaged 7-10 minutes
- Sample of **500**: 400 Residential and 100 Commercial Customers
- Total sample, at 95% confidence level, $\pm 4.4\%$ confidence interval

Overall Customer Satisfaction 2002 - 2014



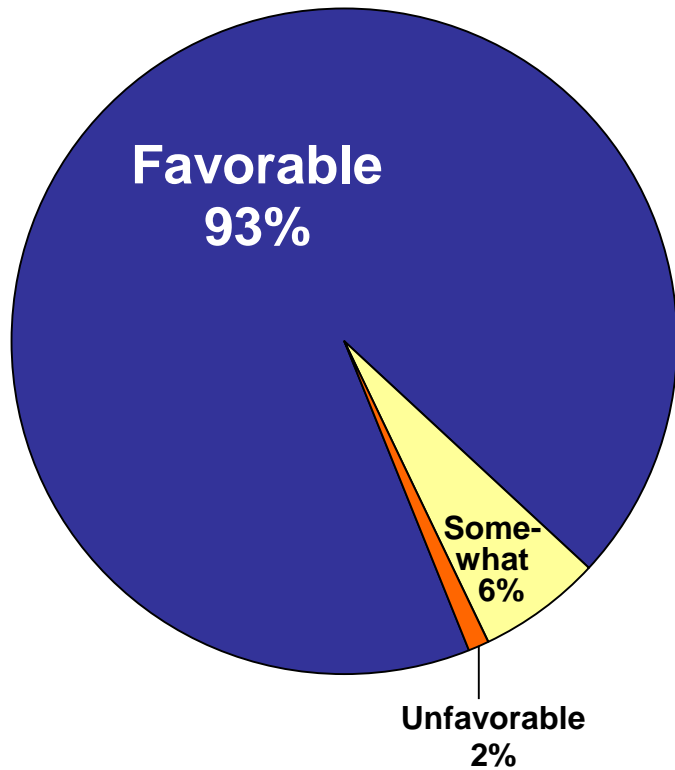
■ Unfavorable
 ■ Somewhat
 ■ Favorable



- From 2002 to 2007, overall satisfaction ratings ranged from 73-82% favorable.
- Since 2008, the favorable ratings have been at 85% or higher.
- In 2014, 93% of respondents provided a favorable rating; this is the same score as last year in 2013.

Overall Customer Satisfaction With Example Comments - 2014

Comments



- **Favorable (93%)**

- *“Keep up the good work.”*
- *“I’ve been very satisfied with the water here.”*
- *“They are always willing to work with us.”*
- *“I appreciate the monthly information they send out.”*
- *“Pleasantly surprised with the quality of our water.”*
- *“They are good people and have a good attitude.”*
- *“Just keep us informed and keep the water flowing.”*

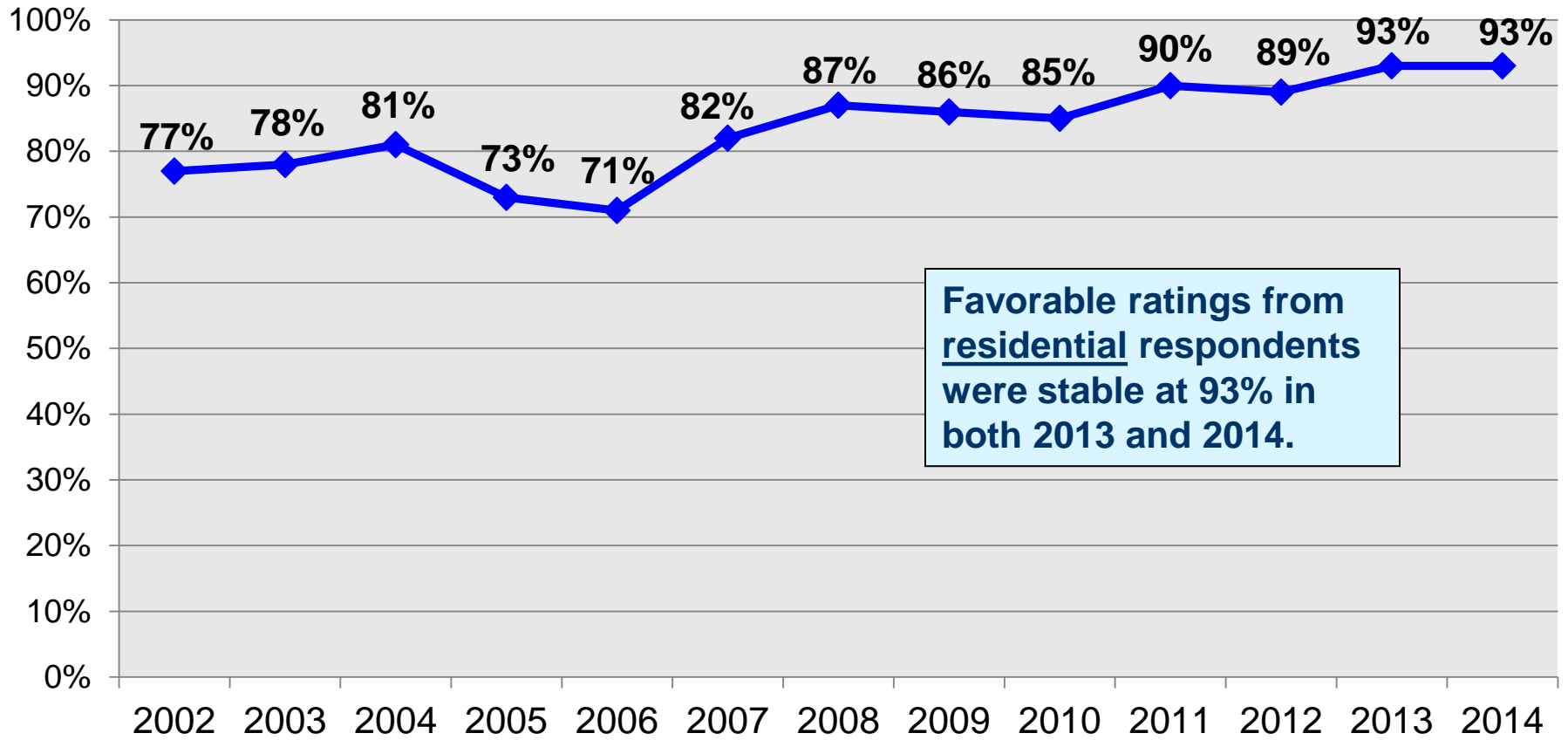
- **Somewhat (6%)**

- *“Review their billing system; it’s not a fair process.”*
- *“The water they provide is good but expensive.”*

- **Unfavorable (2%)**

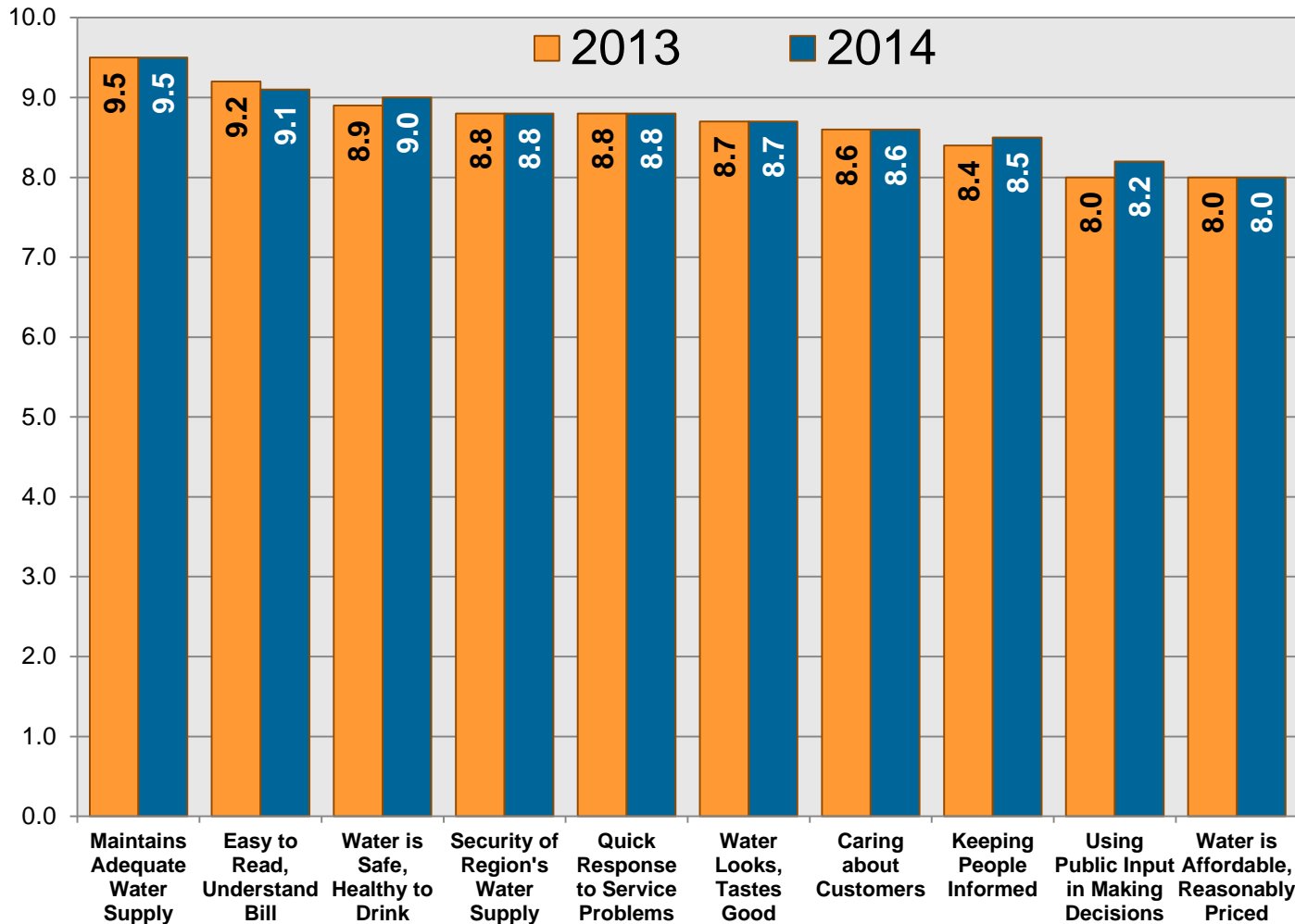
- *“Remove the chemicals from the water.”*
- *“Have better tasting water.”*

Overall Satisfaction Among Residential Respondents 2002 - 2014



TMWA's Performance 2013 - 2014

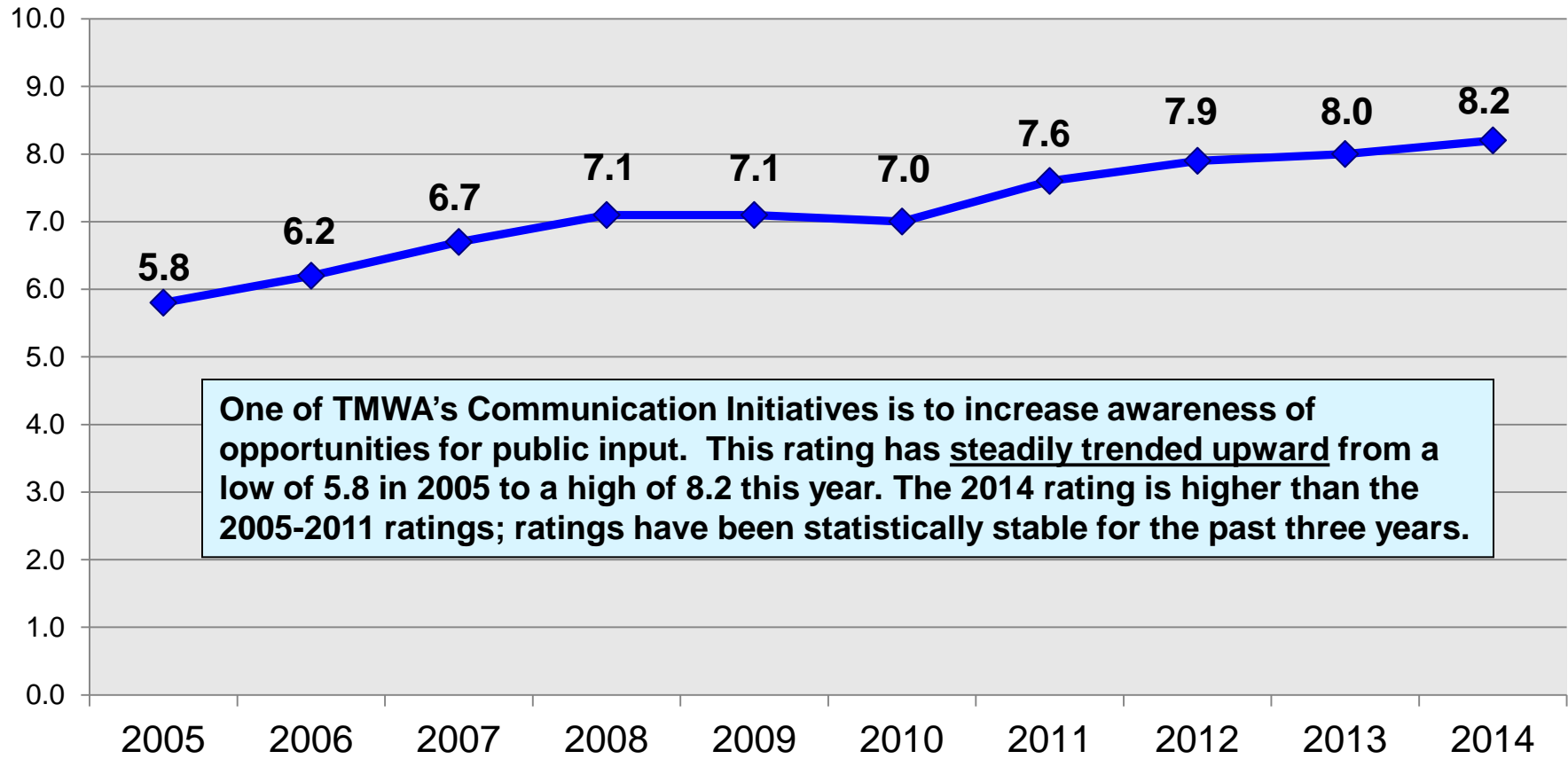
Scale from 0 "Very Poor Job" to 10 "Excellent Job"



In 2014:

- All 10 performance measures continued to have a mean of 8.0 or higher on a 0-to-10 scale.
- The highest rated item continued to be maintaining an adequate water supply.
- The lowest rated item was providing water that is affordable/reasonably priced, which had a mean of 8.0 suggesting a "very good" job.
- None of the 10 ratings changed significantly from last year.

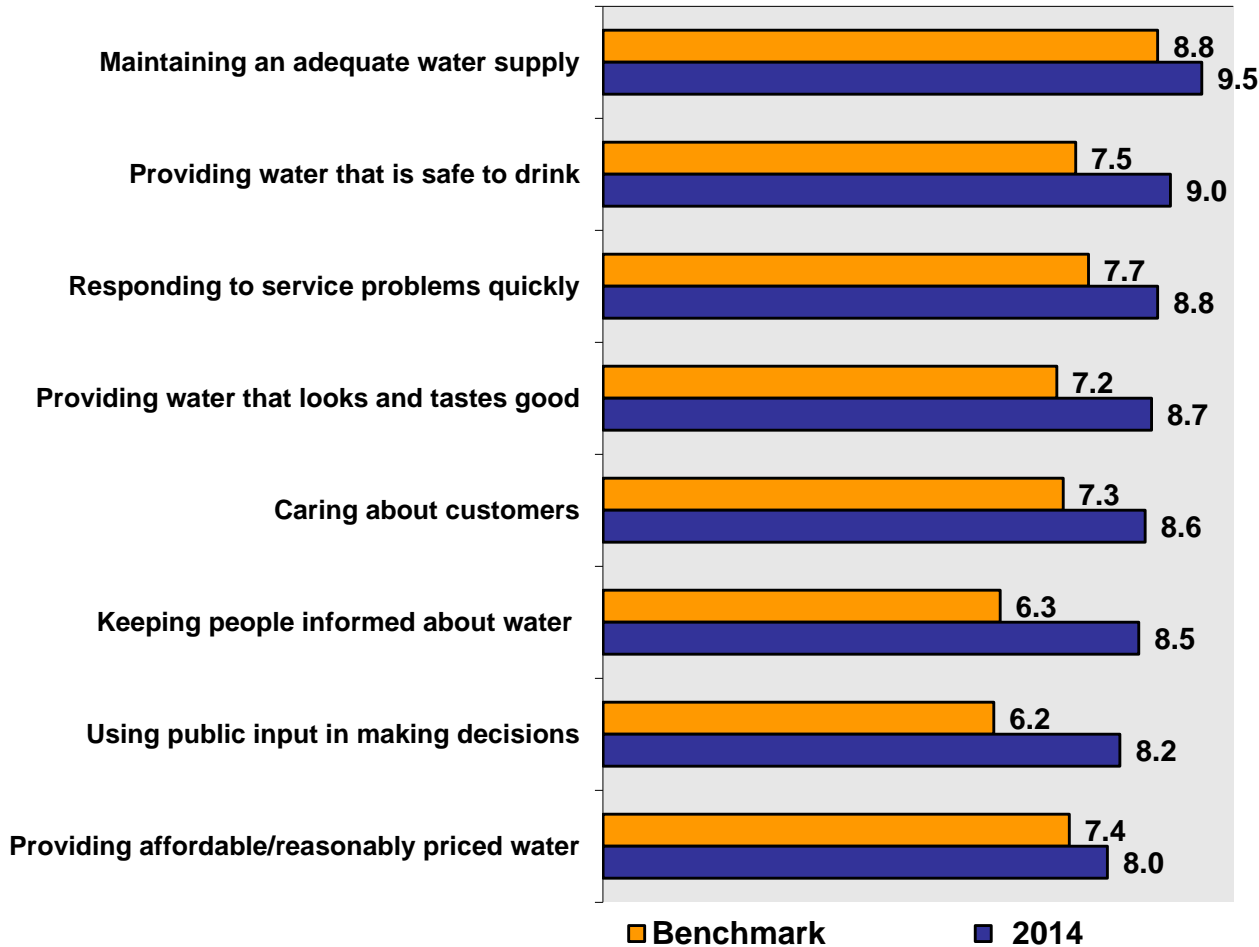
Long-Term Ratings Trend for “Using Public Input in Decision Making” 2005 - 2014



One of TMWA’s Communication Initiatives is to increase awareness of opportunities for public input. This rating has steadily trended upward from a low of 5.8 in 2005 to a high of 8.2 this year. The 2014 rating is higher than the 2005-2011 ratings; ratings have been statistically stable for the past three years.

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

TMWA's 2014 Performance Compared to National Benchmarks



In 2014, TMWA's scores continued to be higher than the benchmarks on all eight measures that had comparative data available.

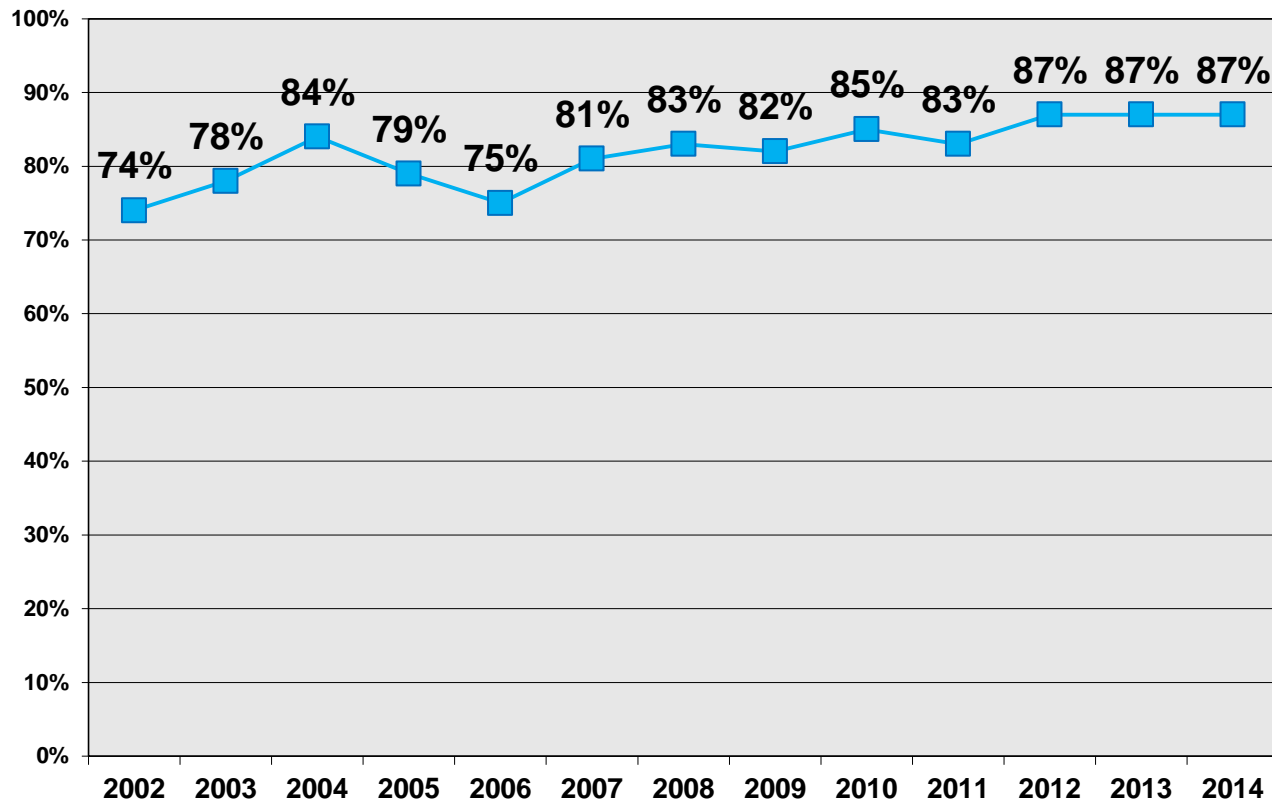
Scale from 0 (very poor job) to 10 (excellent job).

Benchmark Source: American Water Works Association Research Foundation

Drinking Water Quality 2002 - 2014



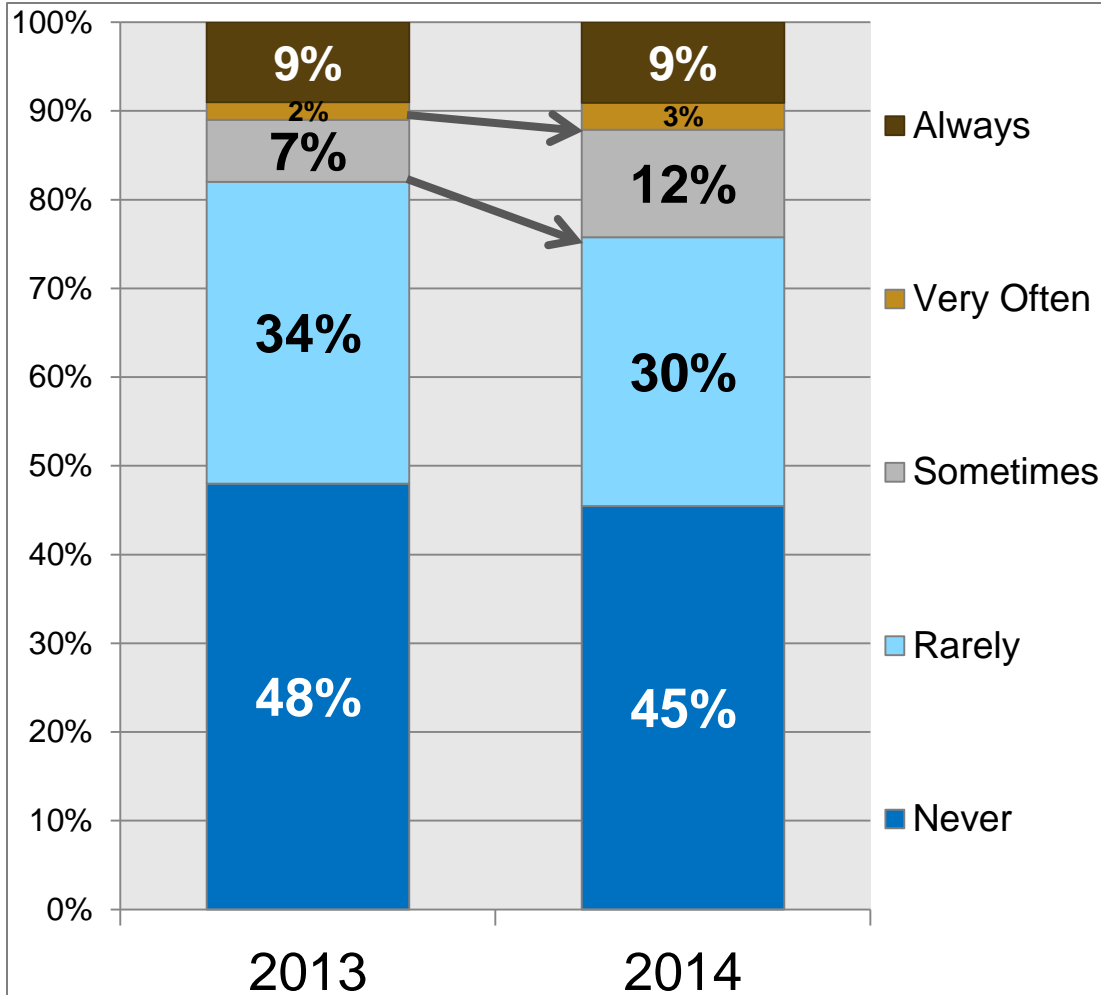
Respondents Who Rated Drinking Water
Quality as Either Excellent or Good



- In 2014, as in both 2013 and 2012, 87% rated drinking water quality as either excellent or good.
- Nearly all respondents (95%) noted “no difference” in water quality as compared to one year ago; about 5% said it was better; just 1% said it was worse.
- Three out of five (59%) reported that their tap water was better than that of other cities; only 3% said it was worse.

Frequency of Having Problems with the Taste of the Drinking Water

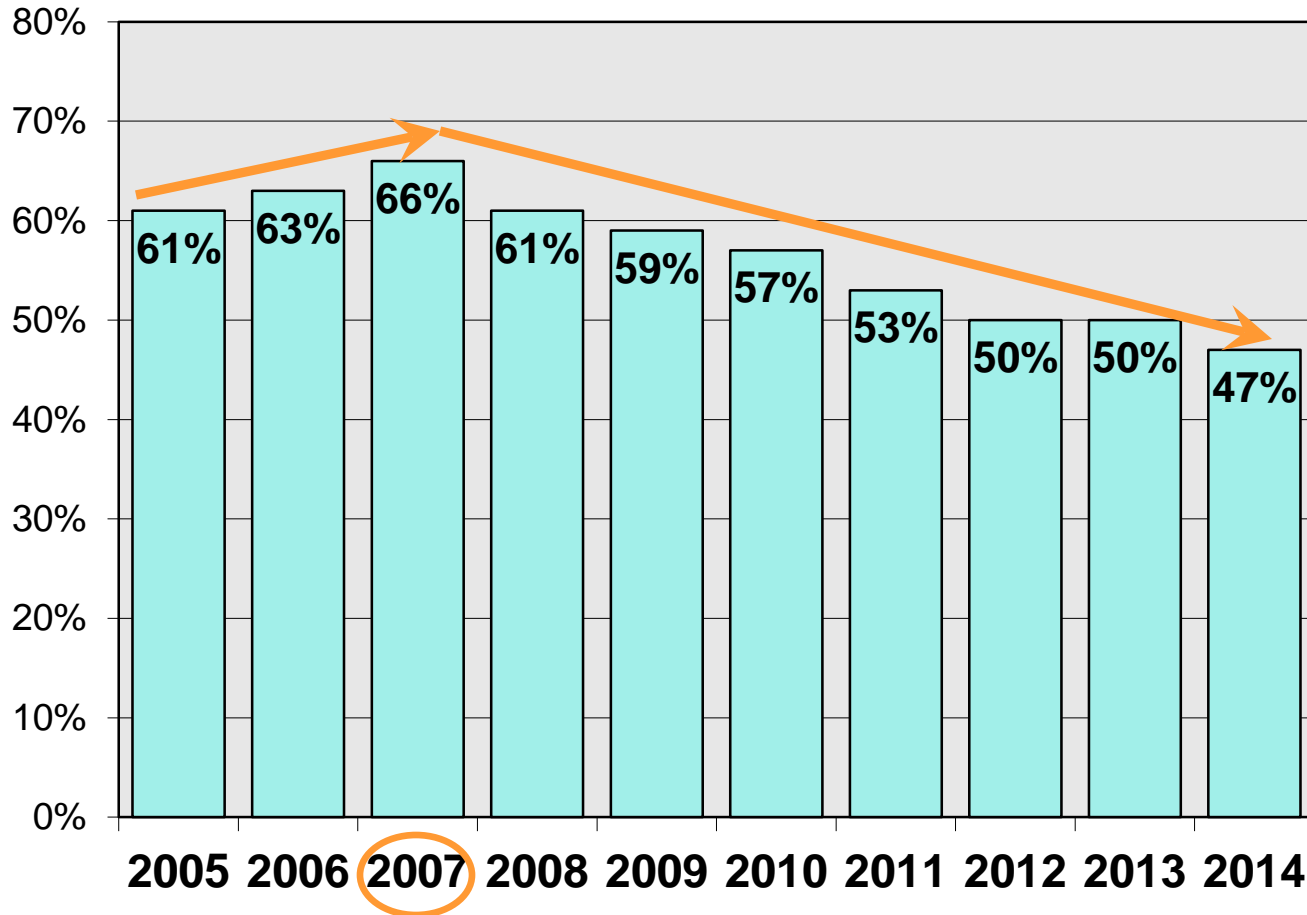
2013 - 2014



- The percentage who rarely or never have problems with the taste of the drinking water declined from 81% last year to 75% this year, while those who sometimes have problems increased from 7% to 12%.
- Example comments from those who sometimes have problems:

 - ✓ *“Sometimes it tastes strange.”*
 - ✓ *“It sometimes has a medicinal flavor.”*
 - ✓ *“Sometimes it has a Chlorine smell.”*
 - ✓ *“Sometimes it is better than at other times.”*
- Overall, 7% of those who rated the water quality as “excellent” said they at least sometimes have problems with the taste, compared to 26% who rated the water quality as “good,” 84% who rated it as “fair,” and 100% of those who rated the water quality as “poor.”

Use of Bottled Water 2005 - 2014

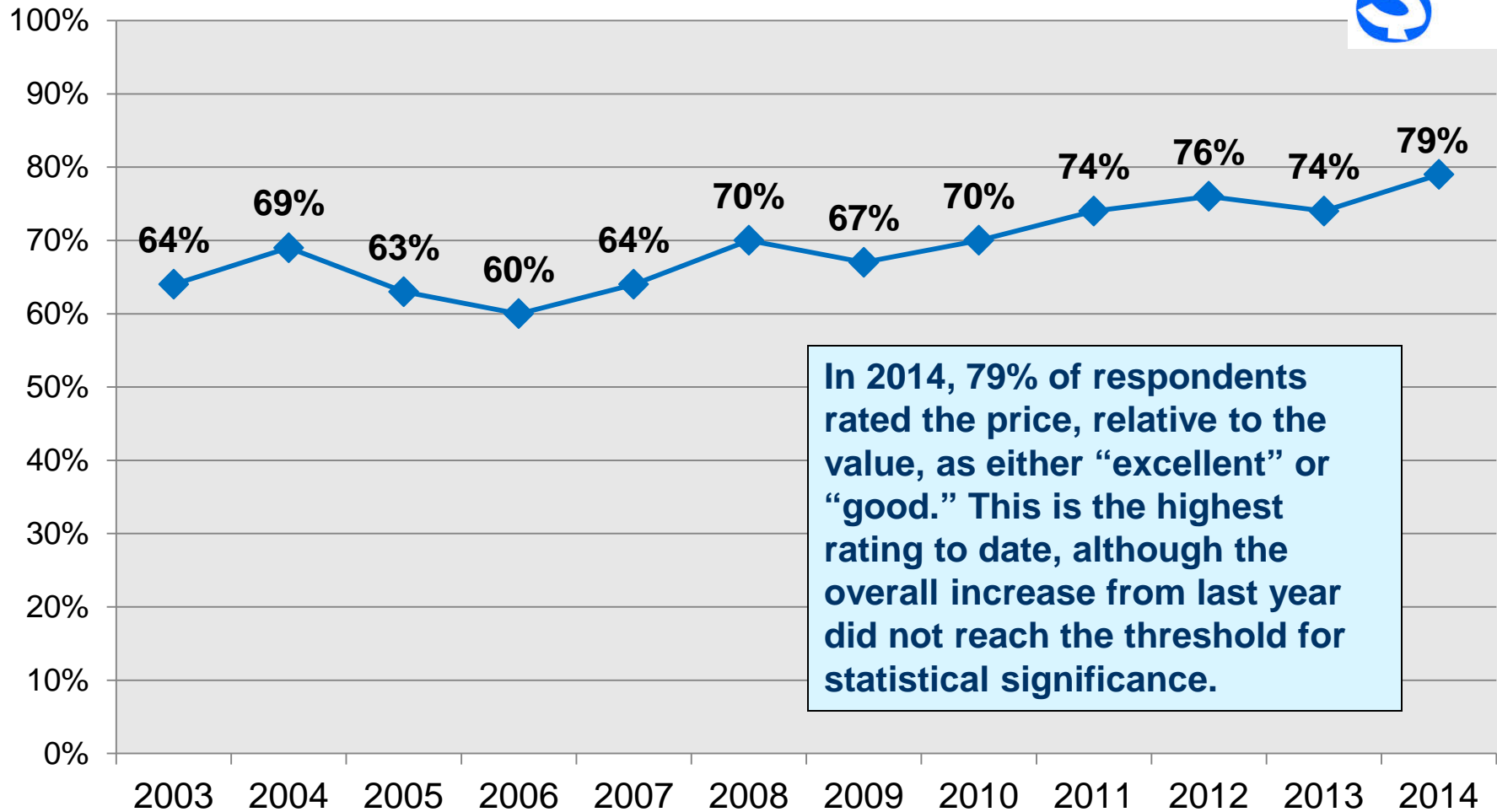


- TMWA customers' use of bottled water peaked in 2007 at 66% usage.

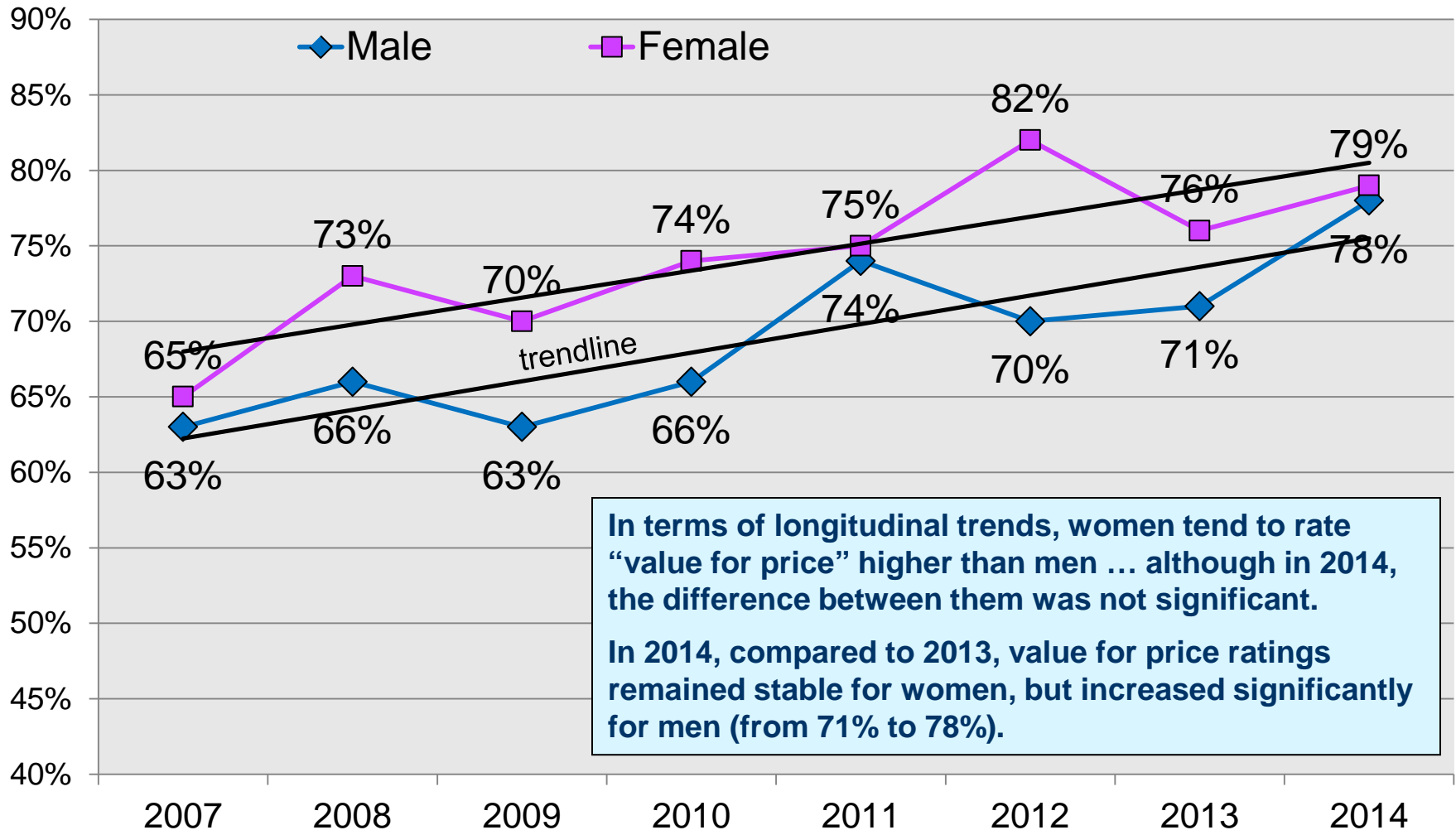
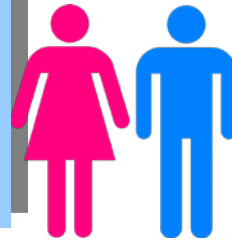
- In 2014, less than half the respondents (47%) reported that they drink bottled water.

- The main reason given for drinking bottled water was convenience (60%).

Price Relative to Value of Quality/Service 2003 - 2014

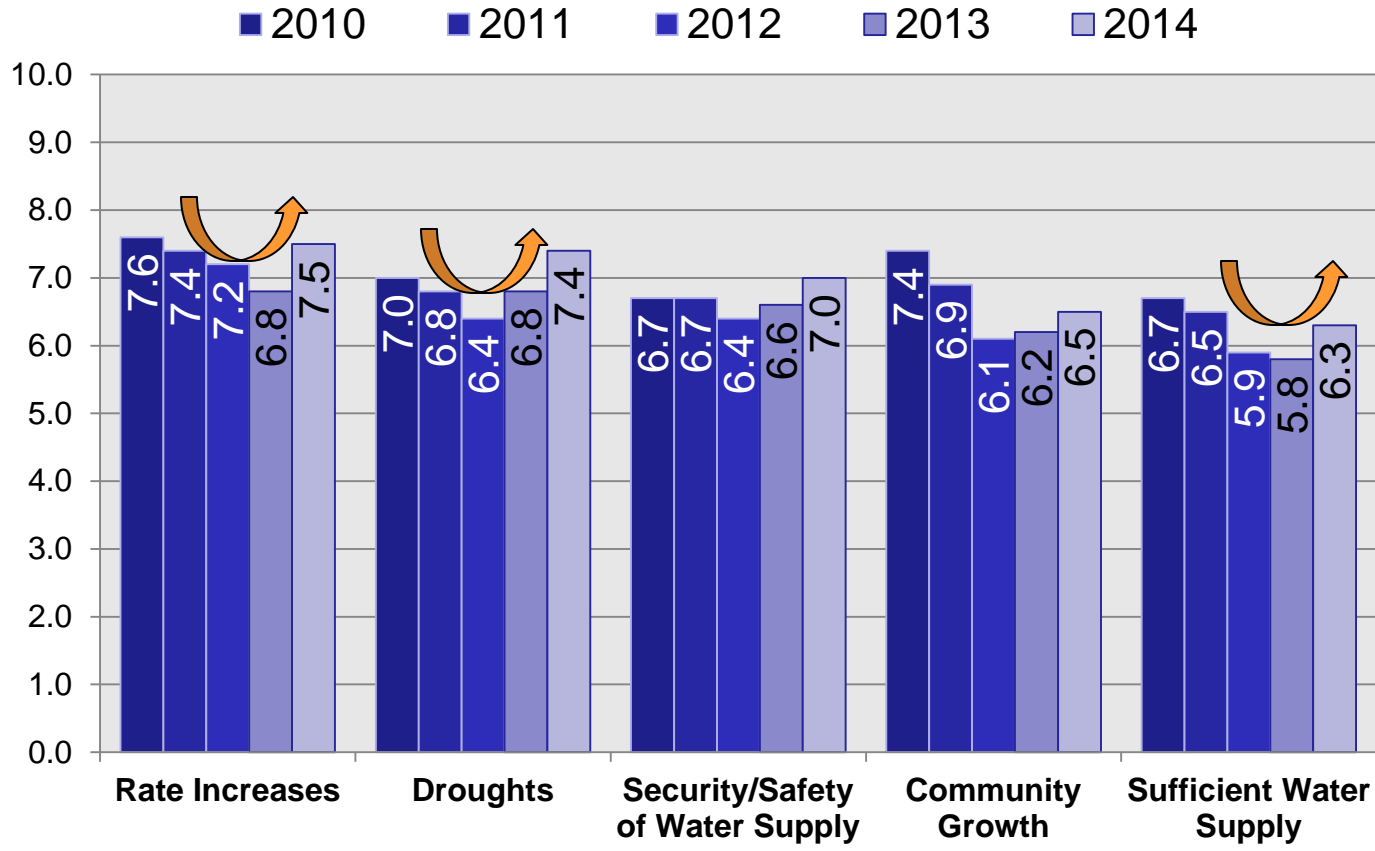


Price Relative to Value of Quality/Service - By Gender, 2007 - 2014



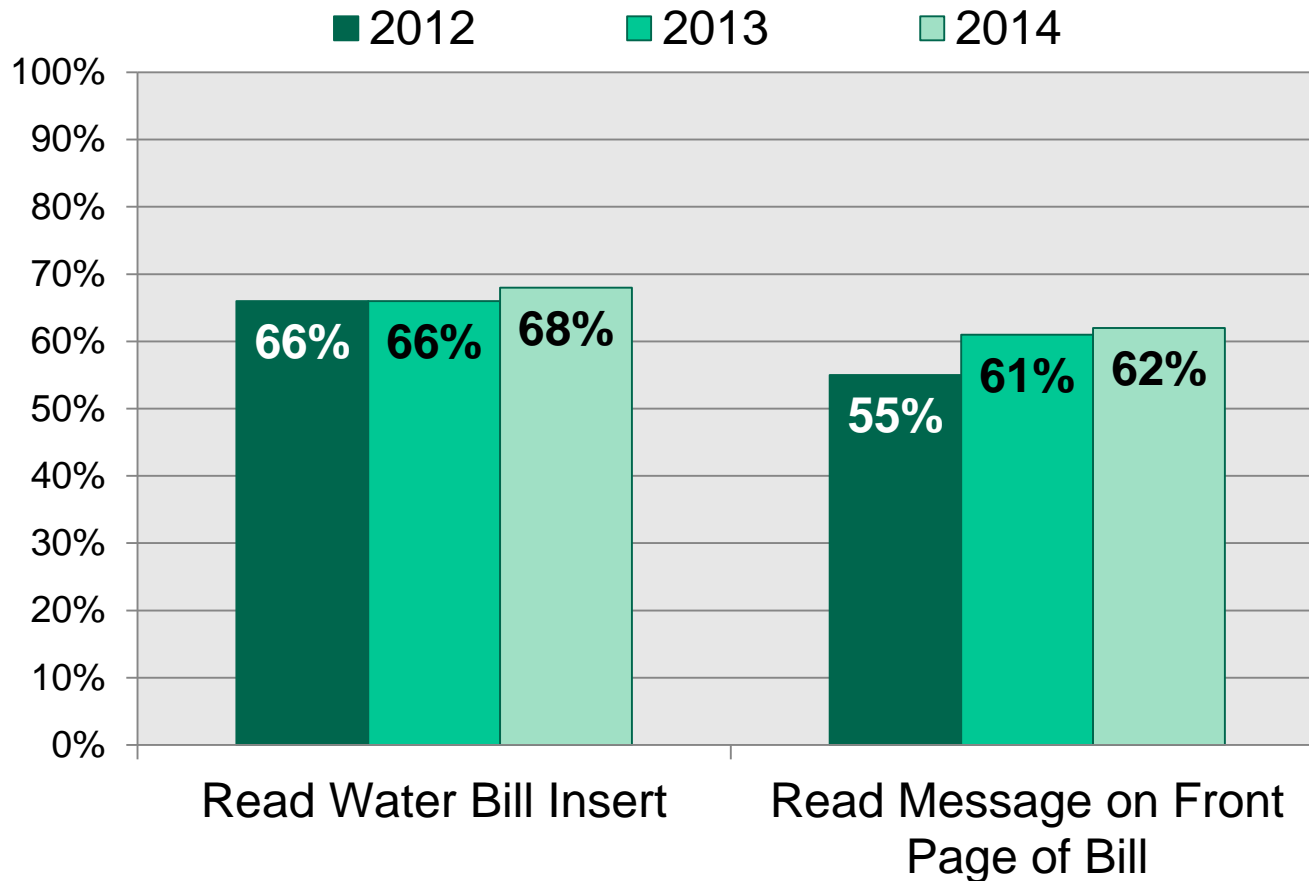
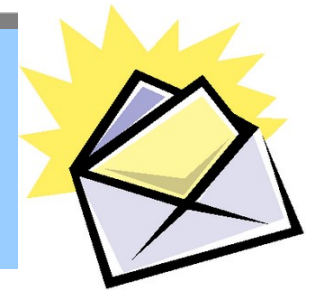
Potential Concerns 2010 - 2014

Scale from 0 "Not at All Concerned" to 10 "Very Concerned"



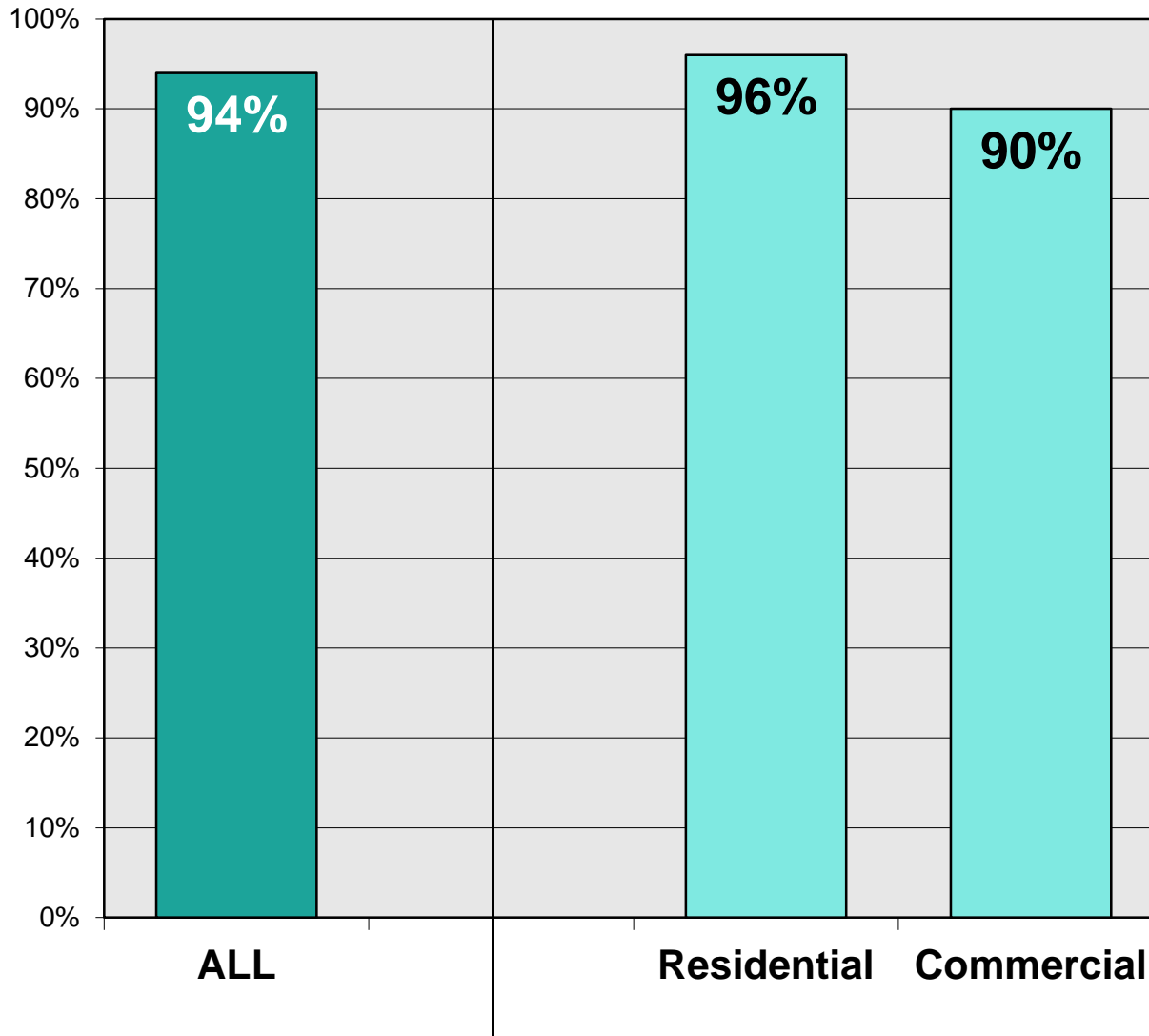
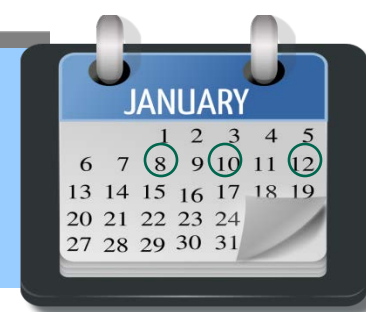
- In 2014, respondents were most concerned about rate increases and, of the 5 attributes measured, were least concerned about having a sufficient water supply.
- Compared to 2013, concern about rate increases, droughts, and having a sufficient water supply increased significantly.
- In 2014, concern about droughts was at a five-year high.

Attention to Written Messages in Water Bill 2012 - 2014



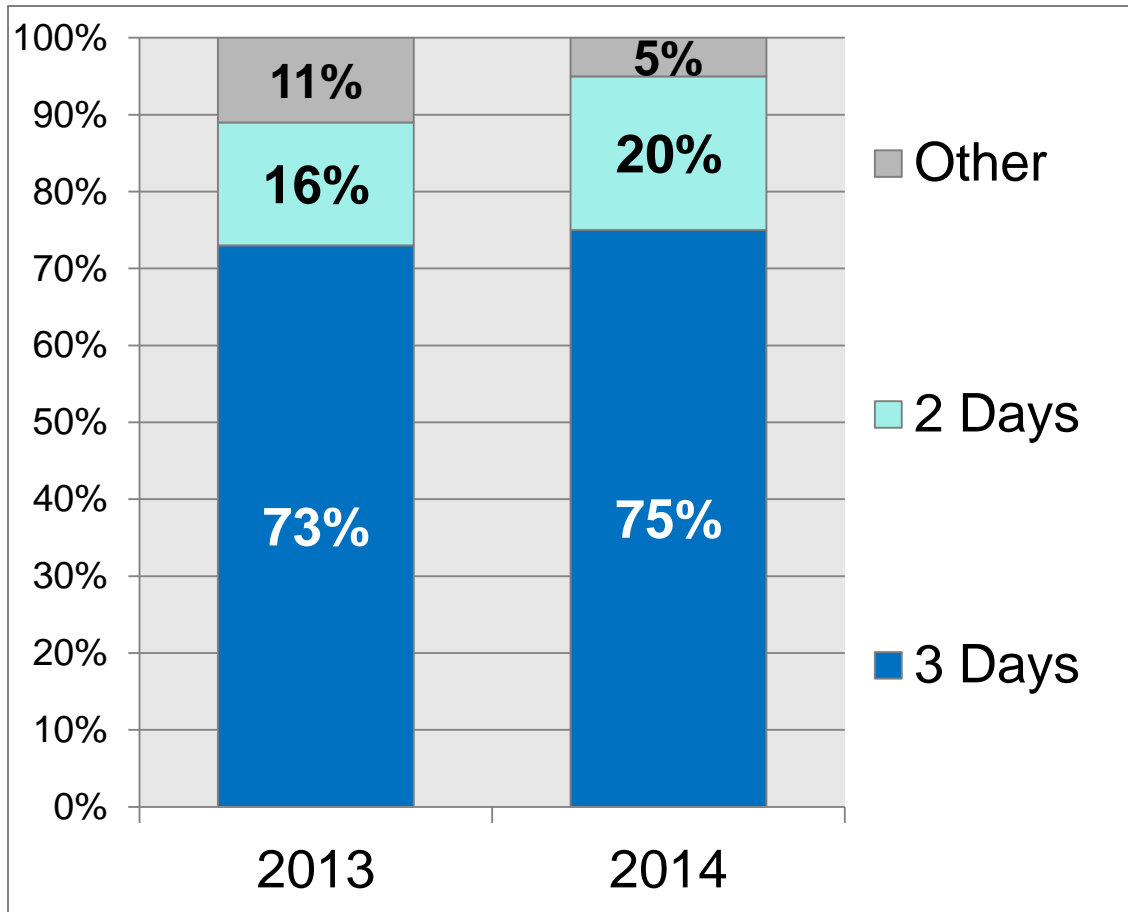
- Slightly more people read the water bill insert than read the message on the front page of the bill.
- The percentage who read the bill insert has been consistently in the 66-72% range from 2008 to 2014.
- The percentage who read the message on the front page of the bill has been in the 55-64% range from 2008 to 2014.

Awareness of Assigned Day Watering By Customer Type - 2014



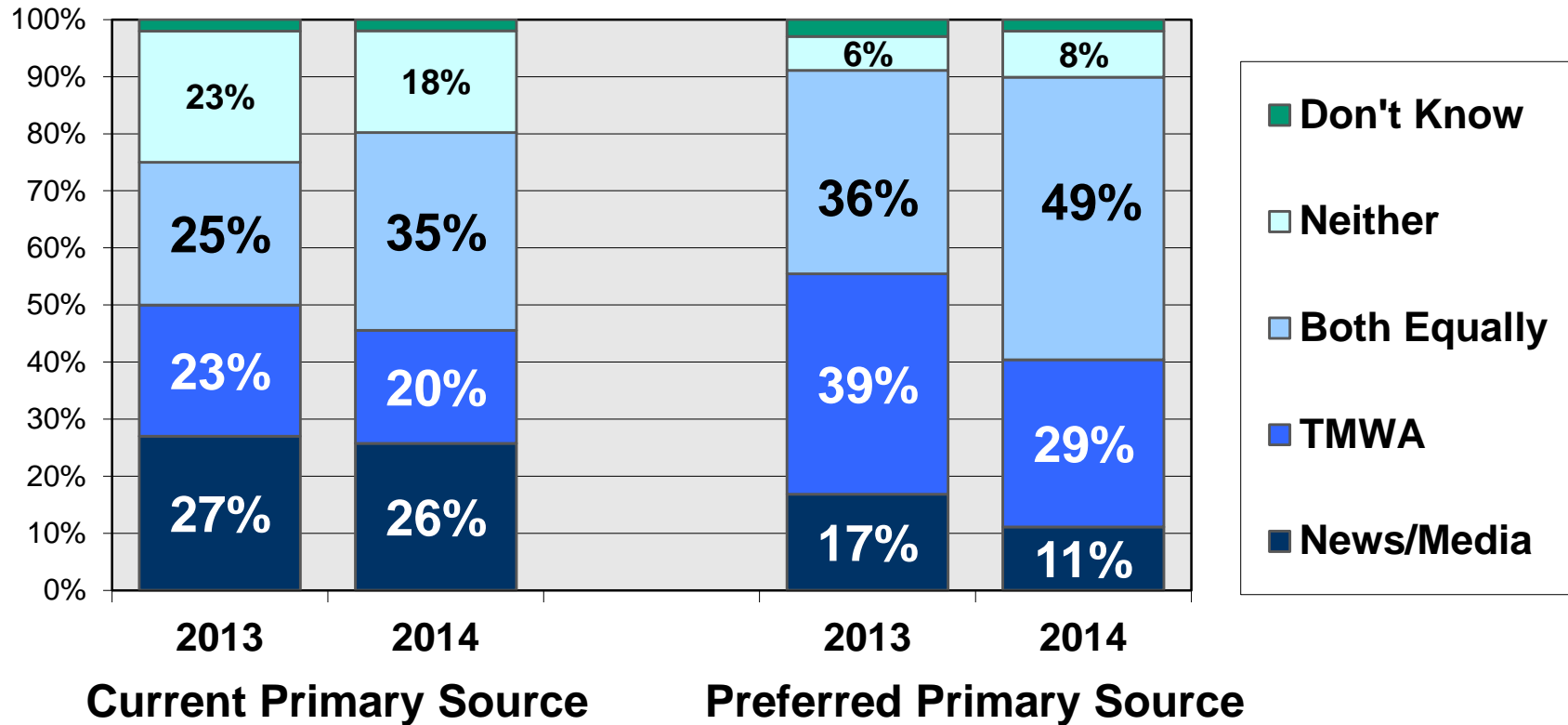
- In 2014, nearly all respondents (94%) were aware of Assigned Day Watering.
- Overall, 93-96% have been aware of this program for the past 7 years.
- In 2014, residential customers were more likely to be aware of Assigned Day watering than were commercial respondents.

Number of Days Per Week Residents Can Water Their Yard with Assigned Days 2013 - 2014



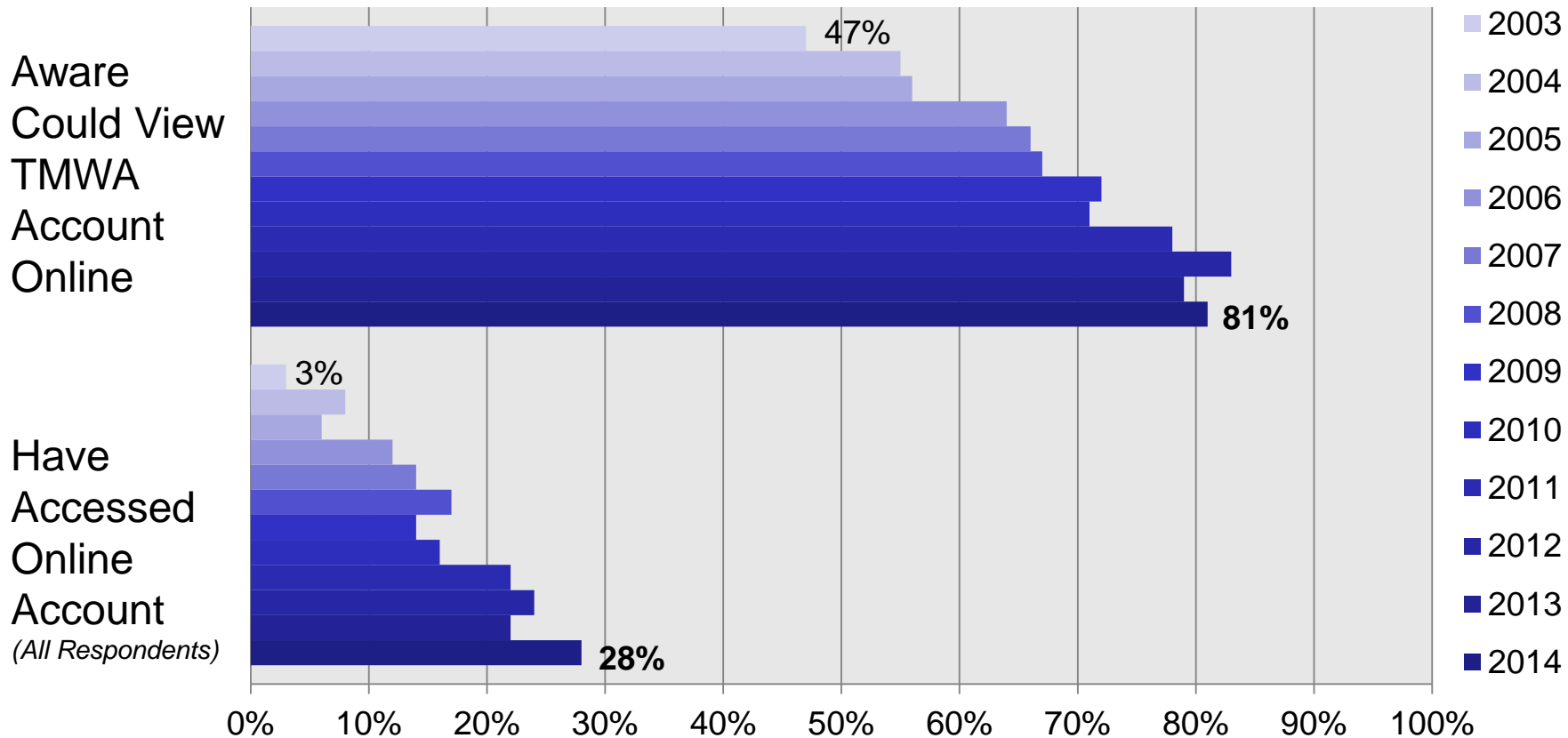
- Overall, 73% of respondents have a lawn that they water.
- Among those who were aware of Assigned Day watering and who have a lawn, 75% reported that they can water their yards 3 days a week, similar to 73% in 2013.
- Nine out of ten (91%) reported that they modify their sprinkler usage based on the actual weather. 

Primary Source of Information About Drinking Water 2013 - 2014



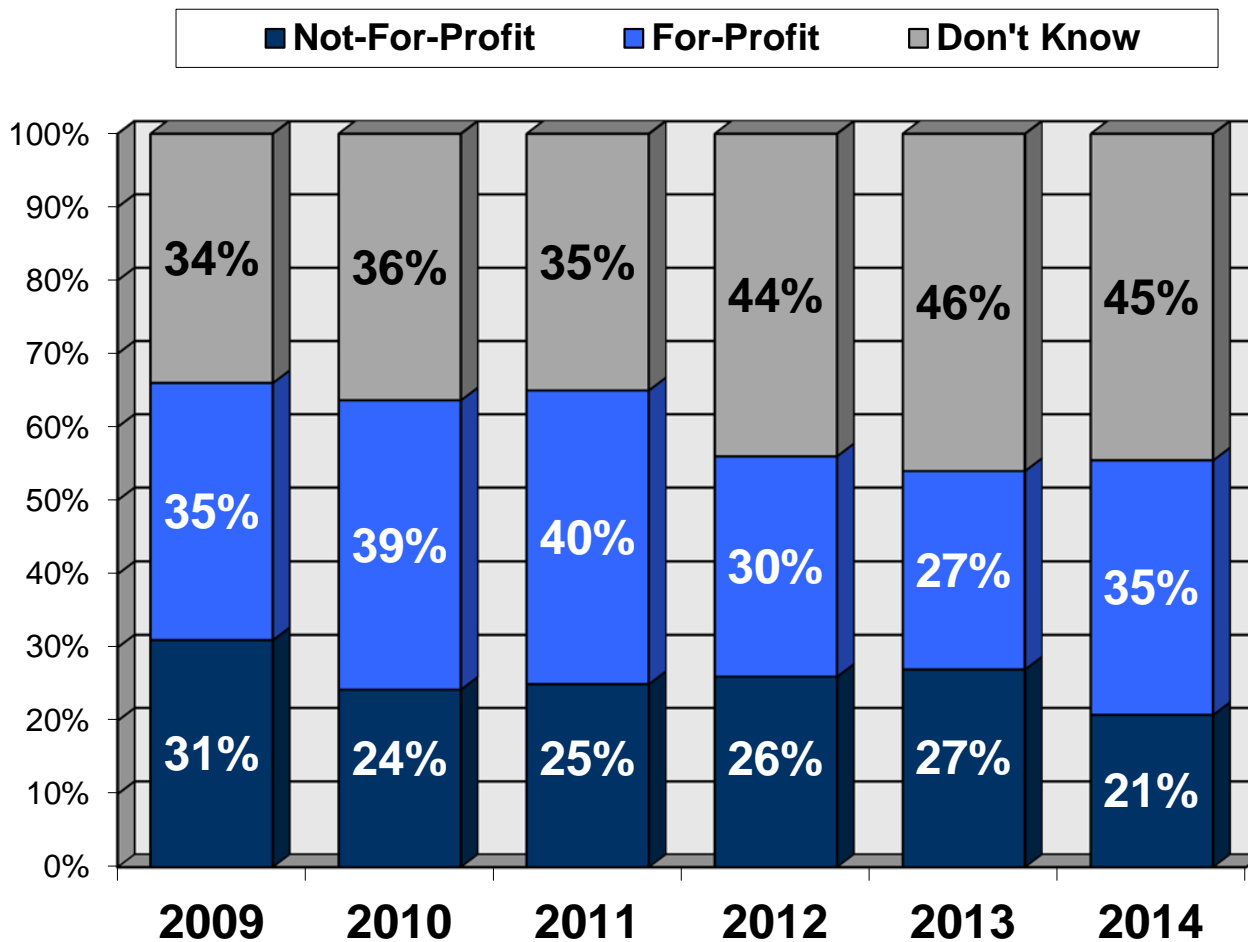
- In 2014, more respondents received information about drinking water from the local news/media (26%) than from TMWA (20%), although more respondents would prefer to receive this information from TMWA (29%) than the local news/media (11%).
- The percentage who received this information from both sources increased from 25% to 35%, while the percentage who would prefer to receive information from both sources increased from 36% to 49%.

TMWA Online Accounts 2003 - 2014



- Over the past four years, general awareness of TMWA online accounts has stabilized, with four out of five respondents (78-83%) aware that they can view their account online.
- The percentage who have actually accessed their online account increased from 22% last year to 28% in 2014, which is the highest level to date.

Awareness of Not-for-Profit Status 2009 - 2014



- In 2014, one out of five respondents (21%) reported that TMWA is a not-for-profit utility; this is the lowest level of awareness since the attribute was first measured in 2009.

- Altogether just 10% (1% *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.

Select Differences Between Groups - 2014



- **TYPE OF CUSTOMER:** Residential customers were more likely than commercial customers to have accessed their TMWA account online.
- **GENDER:** Males were more likely than were females to report that TMWA is a for-profit entity; females were more likely than were males to say that they modify their sprinkler usage based on the actual weather.
- **LENGTH OF RESIDENCY:** Newer residents provided higher ratings for TMWA providing water that is affordable/reasonably price; longer-term residents were more likely to be concerned about community growth.
- **HOUSEHOLD INCOME:** Respondents with lower incomes provided a higher rating for TMWA caring about customers; respondents with higher incomes were more likely to have a lawn and to have a lot size over one-quarter acre.
- **AGE GROUP:**
 - Respondents under age 45 were most likely to have accessed their TMWA account online.
 - Respondents age 45-64 were most likely to have a lawn and to be concerned about droughts.
 - Respondents age 65+ were most likely to be concerned about having a sufficient water supply.

2014 Summary: Connection to TMWA's Goals and Communication Initiatives



TMWA's Goals for Customer Satisfaction		Communication Initiatives	
<p>Residential: Achieve at least 71% favorable ratings; 82%-86% is "excellent" and over 86% is "outstanding"</p>	<p>In 2014, 93% favorable – "Outstanding." Rating remained stable with the same score as last year (93%).</p>	<p>Increase awareness of <u>value</u></p>	<p>Increased. In 2014, ratings for value for price increased significantly for men (from 71% to 78) and remained stable for women; the trendline for both genders continues upwards.</p>
<p>Commercial: Achieve at least 77% favorable ratings; 88%-90% is "excellent" and over 90% is "outstanding"</p>	<p>In 2014, 92% favorable – "Outstanding." Rating remained stable with a similar score as last year (93%)."</p>	<p>Increase awareness of <u>water quality</u></p>	<p>Stable. In 2014, 87% rated the water quality as excellent or good, the same percentage as in 2012 and 2013.</p>
		<p>Increase awareness of <u>not-for-profit status</u></p>	<p>Decreased. In 2014, 21% reported that TMWA was not-for-profit, down from 27% in 2013 and 26% in 2012.</p>
		<p>Increase awareness of opportunities for <u>public input</u> in decision making</p>	<p>Stable. In 2014, the mean rating for using public input was 8.2, similar to 8.0 in 2013, although the trend line continues upwards.</p>

Custom Study of Current Washoe County/DWR and STMGID Residential Customers

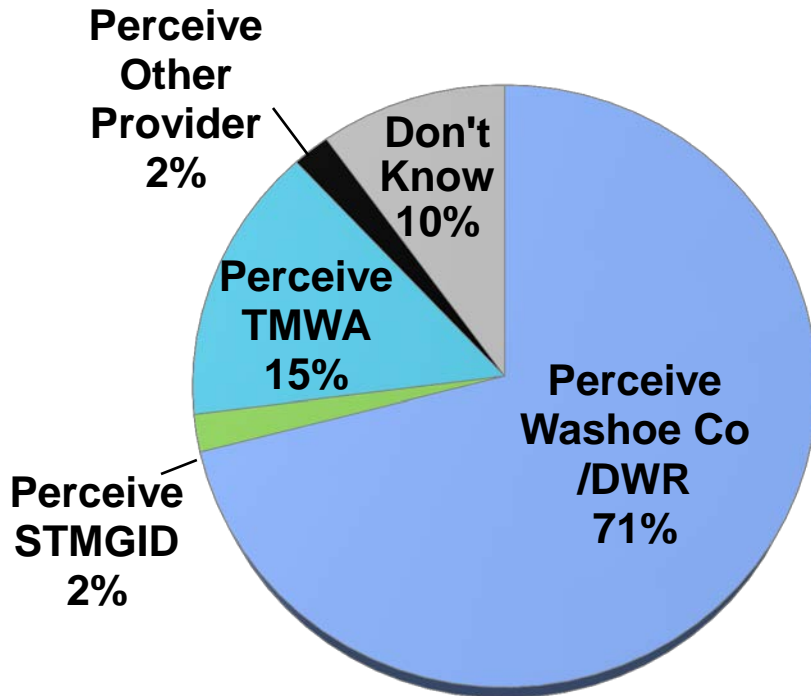
April-May 2014



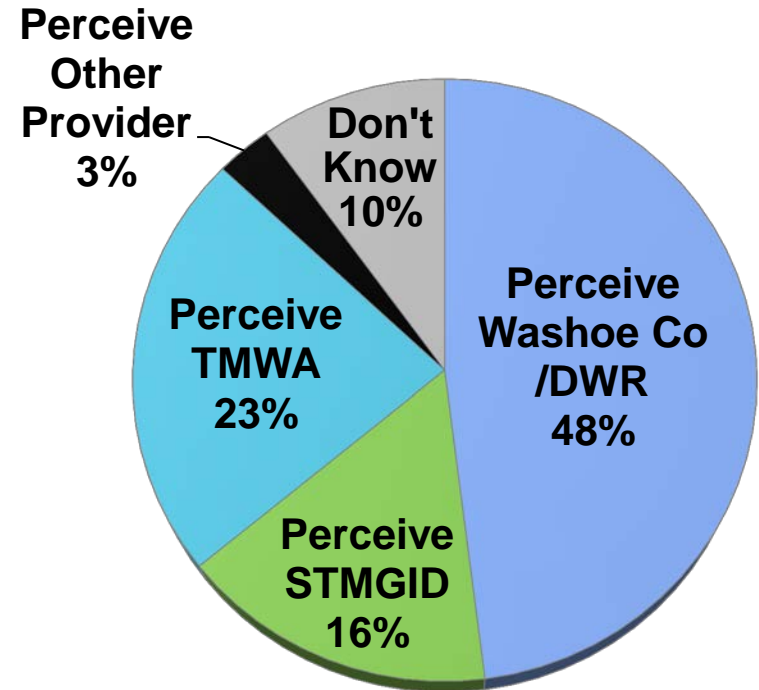
BACKGROUND:

- Based on Interlocal Agreements, current customers of the Washoe County Water Utility (under the Department of Water Resources or DWR) and the South Truckee Meadows General Improvement District (STMGID) are scheduled to become customers of TMWA in early 2015.
- The goals of the consolidation of the local water utilities include improved management of water resources, more efficient infrastructure utilization, enhanced coordination of service, and long-term economies of scale.
- Customer feedback was gathered in April 2014 via a telephone survey of 400 residential customers of Washoe County/DWR and STMGID to provide a baseline of perceptions prior to the merger.
- Overall, Washoe County/DWR customers accounted for 85% of the telephone numbers available in the source database, as well as 85% of the survey respondents; the remainder were STMGID customers.
- Comparisons, where applicable, are made to TMWA's residential customers.

Perceived Water Company – By Actual Water Company



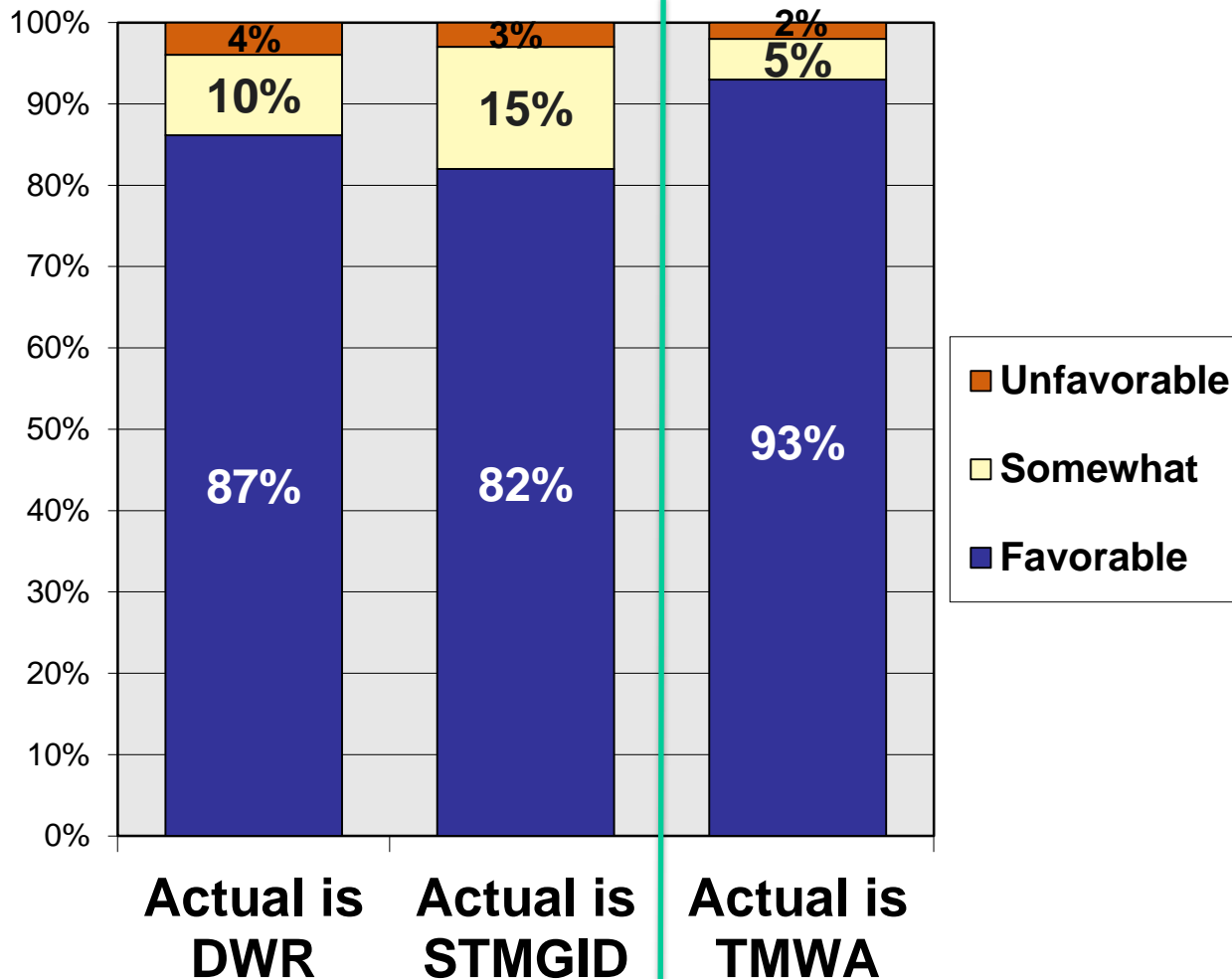
**Actual Water Company
Is Washoe County/DWR**



**Actual Water Company
Is STMGID**

Overall, 17% of all respondents thought that TMWA was (already) their water company.

Overall Customer Satisfaction – Among Residential Customers 2014

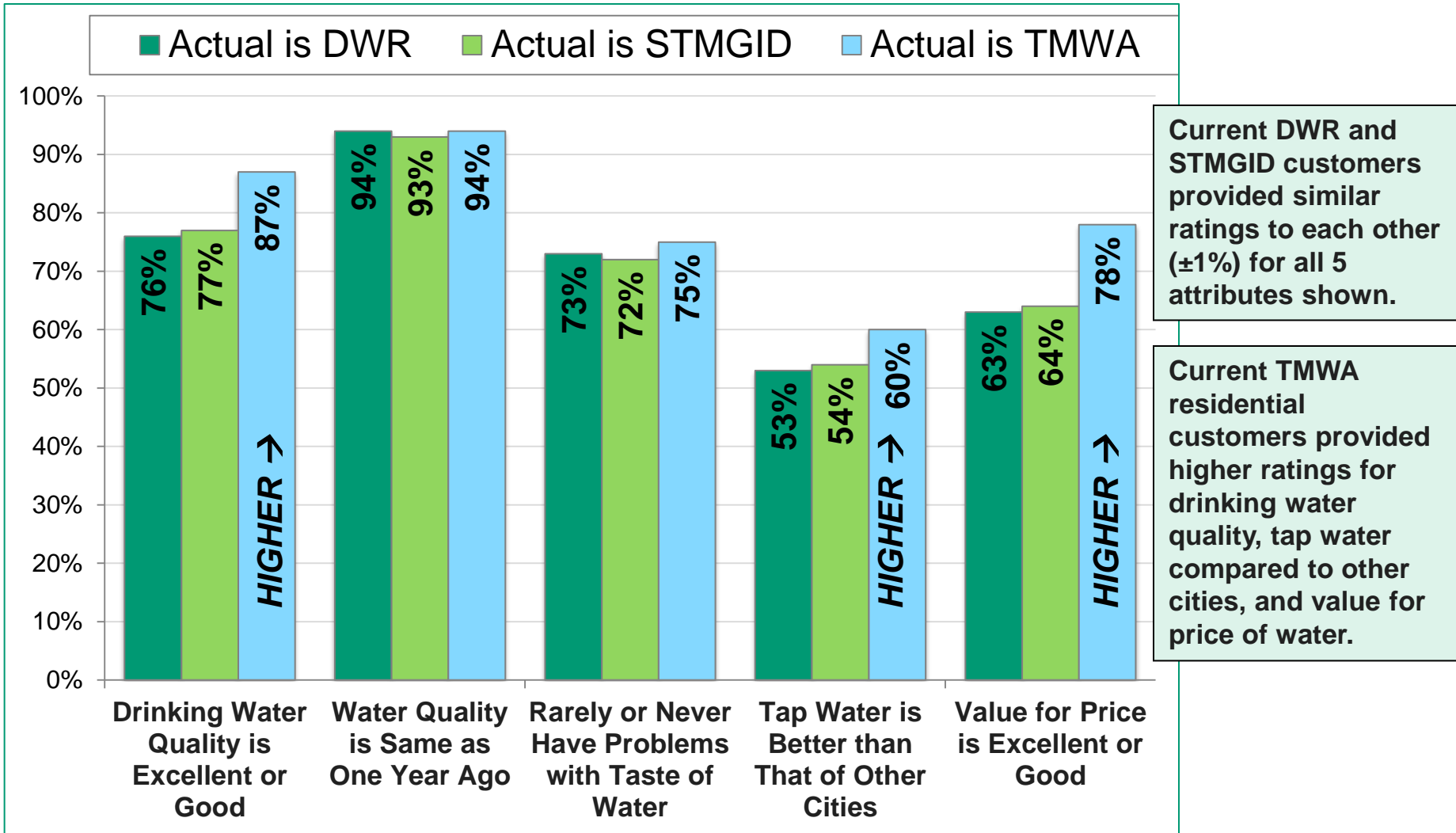


For All Three Utilities:

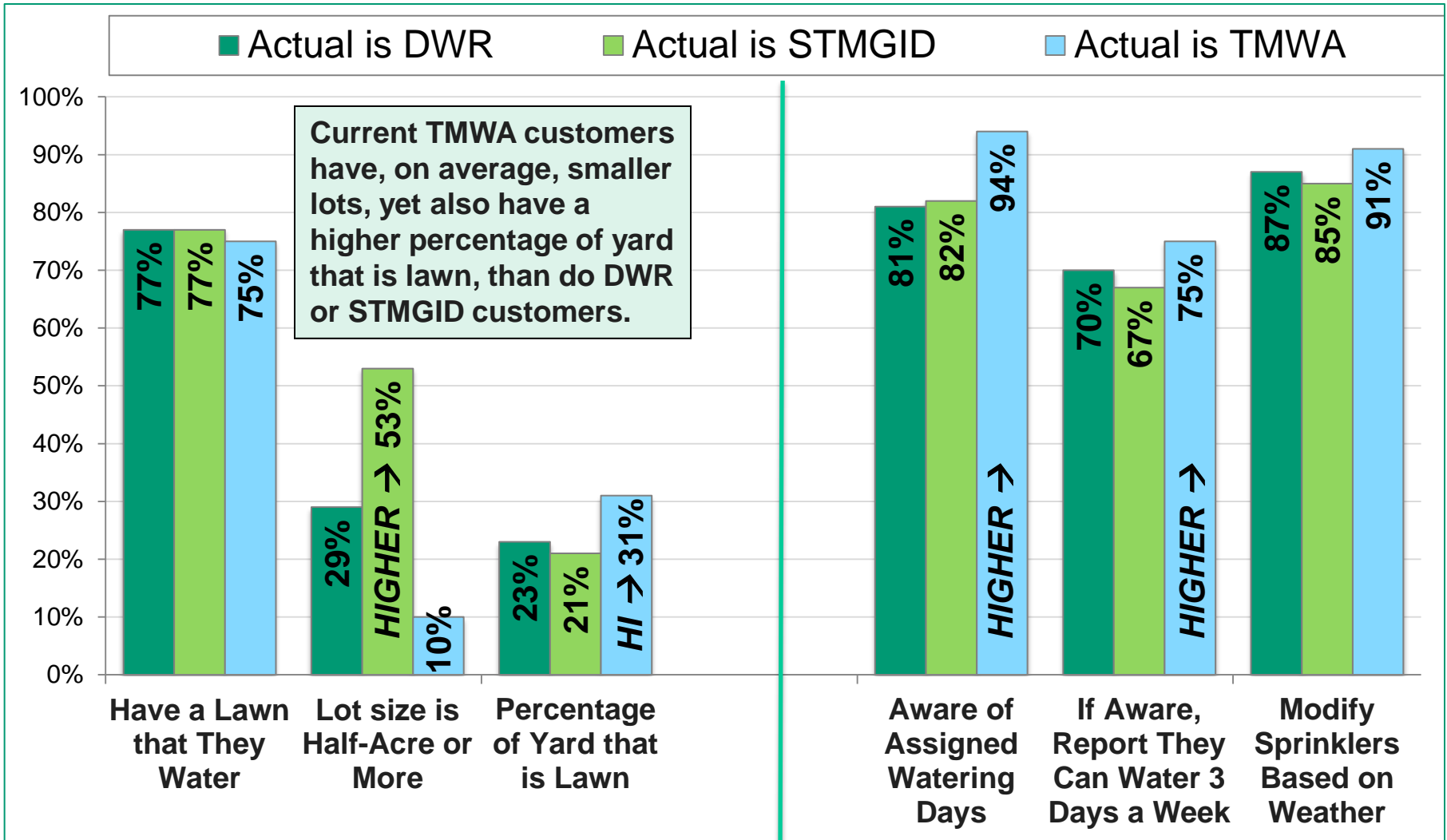
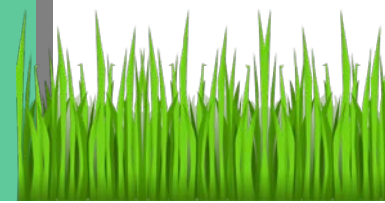
- Over 80% of residential customers provided favorable ratings.
- Less than 5% provided unfavorable ratings.

TMWA's residential customers (from the main survey) were significantly more likely to provide favorable ratings for overall satisfaction than were current DWR or STMGID customers.

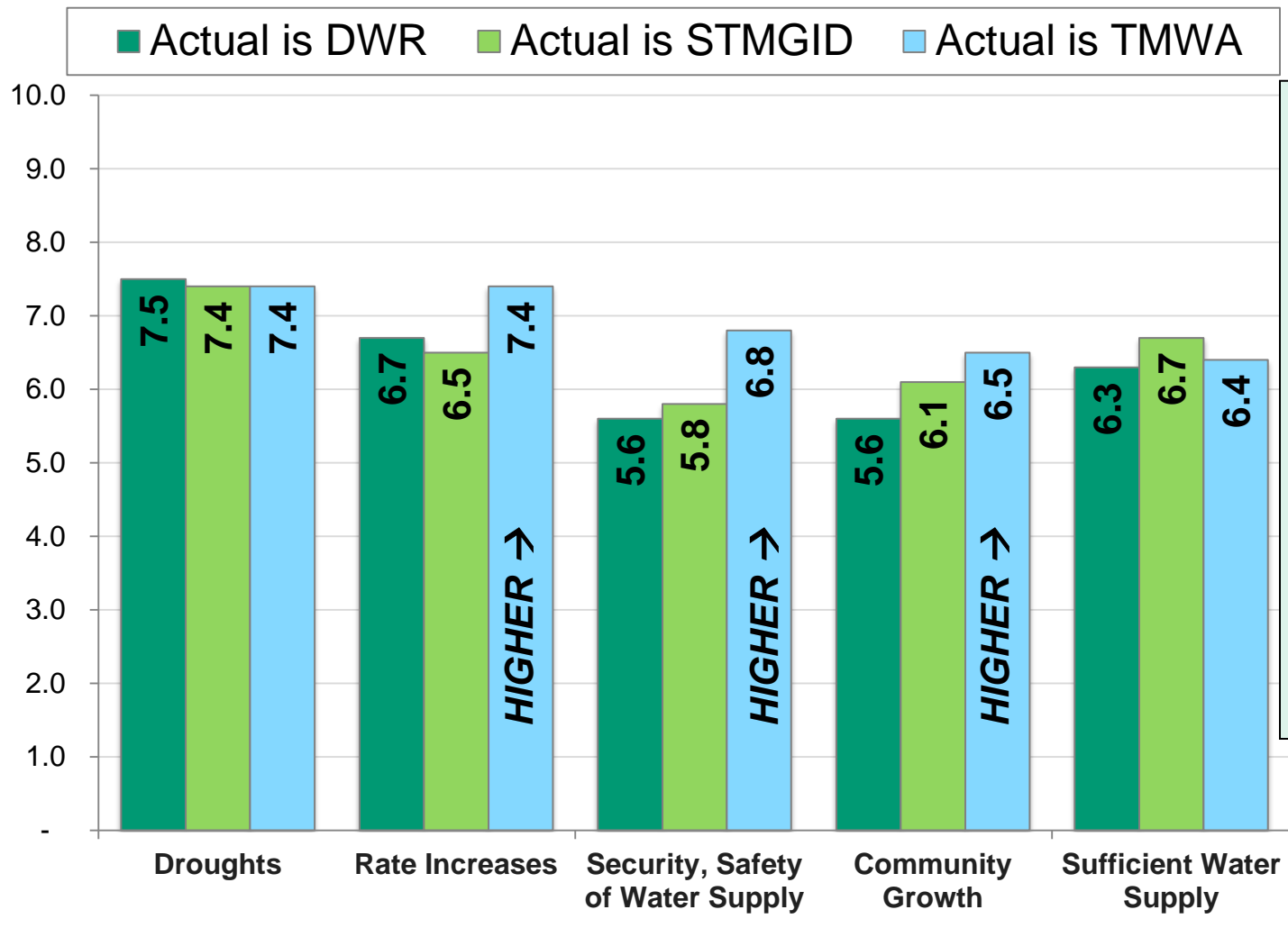
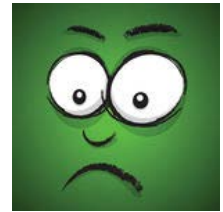
Comparison of Water Quality and Value Ratings – Residential 2014



Comparison of Issues Related to Watering Lawns – Residential 2014



Comparison Regarding Potential Concerns – Residential 2014



All three residential groups were most concerned about droughts (*tied with rate increases for TMWA customers*).

Current TMWA customers were more concerned about rate increases, security & safety of the water supply, and community growth than were current DWR and STMGID customers.

Perception of TMWA By DWR/STMGID Customers

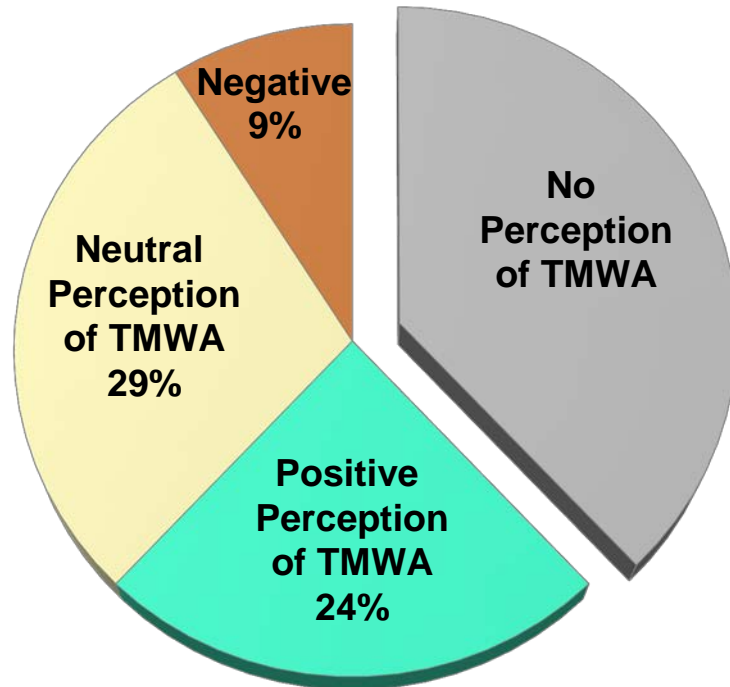


Among the 66 DWR/STMGID customers (17%) who perceived TMWA to be their water company:

- 86% provided favorable ratings,
- 11% were somewhat satisfied, and
- 5% were unfavorable.

Among all other DWR/STMGID respondents, about two-fifths (38%) had “no perception” of TMWA. Among those who had a perception, the most common perception (29%) was a neutral one, while positive perceptions of TMWA outweighed negative perceptions by nearly a 3-to-1 margin.

In the open-ended comments section, only 4% of DWR/STMGID respondents who provided a comment mentioned the merger (e.g., “*I hope they stay independent*”), suggesting that the merger was NOT a top-of-mind issue for most.



**Perception of TWMA –
If Not Perceived to Be
Their Water Company**



TRUCKEE MEADOWS WATER
AUTHORITY

2014

Customer Satisfaction

