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Conducted by



**475 Hill Street, Suite 2
Reno, Nevada 89501
(775) 323-7677
www.infosearchintl.com**

TRUCKEE MEADOWS WATER AUTHORITY 2015 CUSTOMER SATISFACTION STUDY

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2015 EXECUTIVE SUMMARY

KEY OBSERVATIONS (*One Page Summary*)

- In 2015, 92% of respondents expressed a positive level of satisfaction with TMWA by indicating they were either totally or mostly satisfied, similar to 93% in both 2014 and 2013. Commercial (93%) and residential (92%) customers expressed a similar level of positive satisfaction with TMWA. The longer the length of residency, the more likely respondents were to be mostly, rather than totally, satisfied.
- Of the ten performance attributes that were measured on a 0-10 scale, maintaining an adequate water supply received the highest mean rating (9.5), while using public input received the lowest (7.9). In 2015, residential respondents rated responding to service problems quickly/effectively higher than did commercial respondents. All ten performance ratings have remained statistically stable over the past three years.
- One out of four respondents (27%) had contacted TMWA in the prior 12 months, up significantly from 12-16% in the prior two years. The most common reasons for contacting TMWA in 2015 were billing issues (36%), new service connections (12%), a change of service (10%), and water leaks (10%).
- In 2014, 85% of respondents rated the drinking water quality as excellent or good, similar to 87% last year. Three out of four (77%) reported rarely or never having problems with the taste of drinking water, similar to 75% last year. The majority of respondents (92%) noted no difference in the quality of their drinking water compared to one year ago, while another 5% said the water quality was better, and 3% said it was worse.
- Over half (55%) indicated that the tap water quality is better than that of other cities. The percentage who drink bottled water appears to have stabilized at about 50% over the past four years.
- Overall, 71% reported that they receive either an excellent or good value for the price of their water, down from 79% last year in 2014 and closer to 74% in 2013.
- Compared to 2014, customers' level of concern about droughts, a sufficient water supply, and community growth all increased significantly, while concern about rate increases rebounded down.
- Three out of five respondents (62%) read the water bill insert at least occasionally. Additionally, 50% read the message printed on the front page of their bill, down from 61-62% in the prior two years.
- More respondents received most of their information about the quality and safety of their drinking water from the local news/media (25%) than from TMWA (19%), although more respondents would prefer to receive most of this information from TMWA (32%) than the local news/media (17%). Additionally, 41% reported obtaining drinking water information from both the local news/media and TMWA, up from 35% in 2014 and 27% in 2013.
- Almost all respondents (92%) were aware of "Assigned Day" watering. Overall, 70% have a lawn that they water and, of those, three out of four (73%) reported that they could water 3 days a week. Additionally, 91% reported that they modify their sprinkler usage based on the actual weather.
- One out of four (24%) indicated, correctly, that TMWA is a not-for-profit utility. Altogether just 16% of respondents – 4% unaided plus 12% when aided – correctly identified that elected officials from Washoe County, the City of Reno, and the City of Sparks provide oversight for TMWA.
- Overall, 35% accessed their TMWA account online, up from 28% in 2014 and 22% in 2013; this is the highest level to date.
- Among commercial respondents, 93% reported that their building was equipped with backflow prevention assemblies and 80% were aware that backflow assemblies need to be tested annually; these results have been statistically stable over the past four years.

OBJECTIVES AND METHODOLOGY

2015 Objectives

The primary objectives of the 2015 Customer Satisfaction survey were to:

- Assess the current level of satisfaction of TMWA customers with performance and service issues.
- Assess customers' attitudes toward various water related issues including water sufficiency, security, and quality.
- Determine if there are significant differences between sub-groups of customers.
- Identify significant changes in ratings over time.

This is the 14th wave of this annual survey that has been conducted since 2002. Comparisons to prior studies are made where appropriate.

2015 Methodology

The study consisted of 500 telephone interviews of TMWA customers; the interviews were evenly spread throughout the 12-month survey period of July 2014 to June 2015. This period represents TMWA's 2015 fiscal year and is referred to as 2015 data in this report. The sample population was divided into two segments: residential customers (n=400) and commercial customers (n=100). All respondents were called at random from a customer list supplied by TMWA.

The residential interviews were generally conducted Monday through Saturday between 4:00 p.m. and 8:00 p.m. and, on average, took 8 to 9 minutes each to complete. The commercial telephone interviews generally took place Monday through Friday between 2:00 p.m. and 5:00 p.m. and, on average, took 7 to 8 minutes each to complete.

Based on a 95% confidence level, the total sample of 500 has a confidence interval of $\pm 4.4\%$. While the data from the different demographic groups, such as customer type, gender, and age group is offered for comparison purposes, the sample size of the subgroups does not carry the same confidence interval as the overall data. All statistically significant findings, however, take into account the sample sizes of the various subgroups.

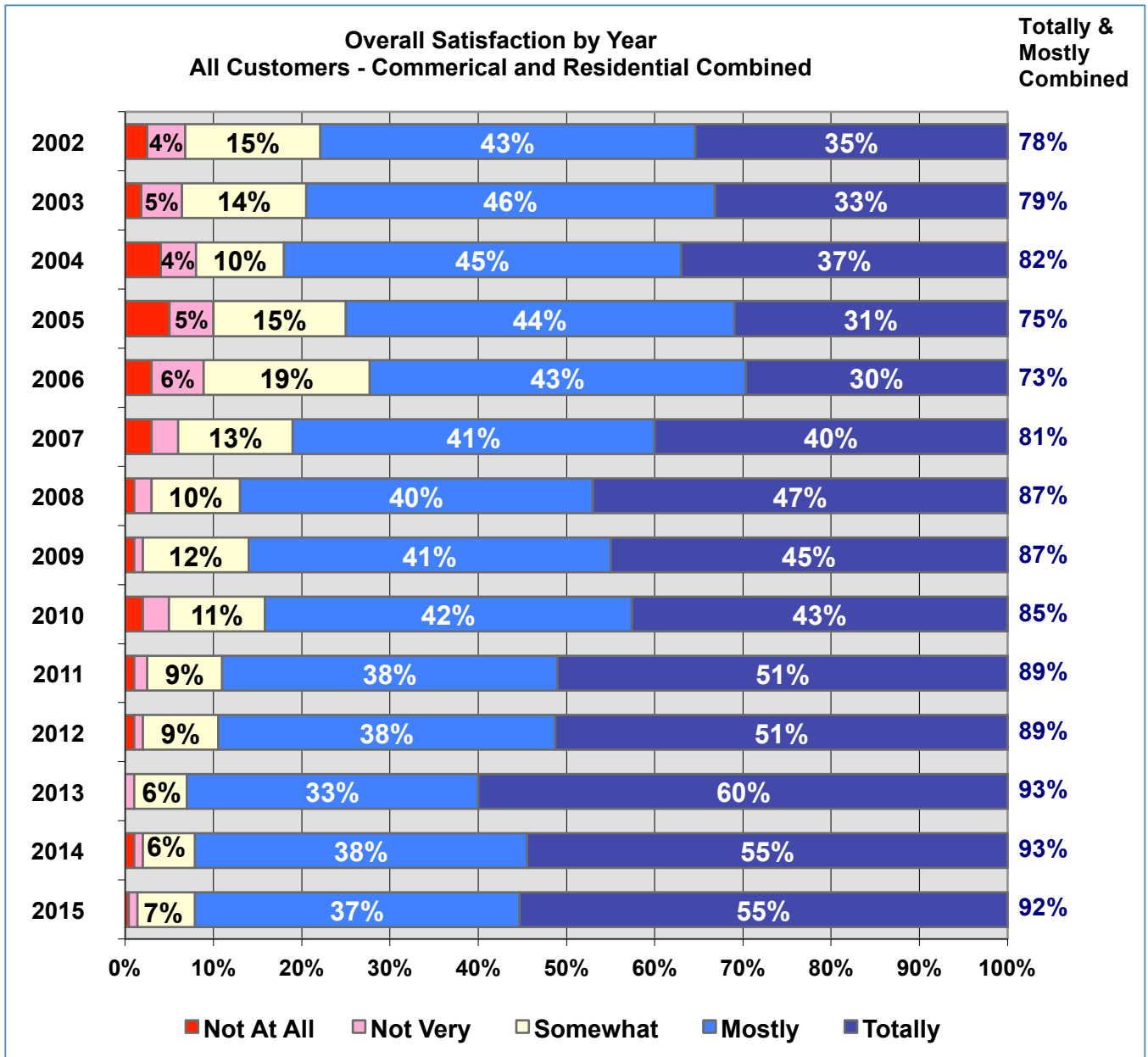
Among the residential respondents in 2015, three out of five (62%) had lived in the area for 10 or more years, 60% had an annual household income of less than \$75,000, and 67% had 1 or 2 people living in the household. On average, 25% of residential respondents' yards were lawn and 40% had a lot size of at least one-quarter acre.

Commercial respondents represented a variety of business types. Among the commercial respondents in 2015, 74% worked in a building that was 20 years or older. Additionally, 58% had landscaping that they either maintained or paid others to maintain, down from 69% last year and 81% in 2013.

While some of the charts in the Executive Summary include results that date back to the beginning of this study in 2002, the text in the Detailed Findings section focuses on the most recent eight years of results for readability.

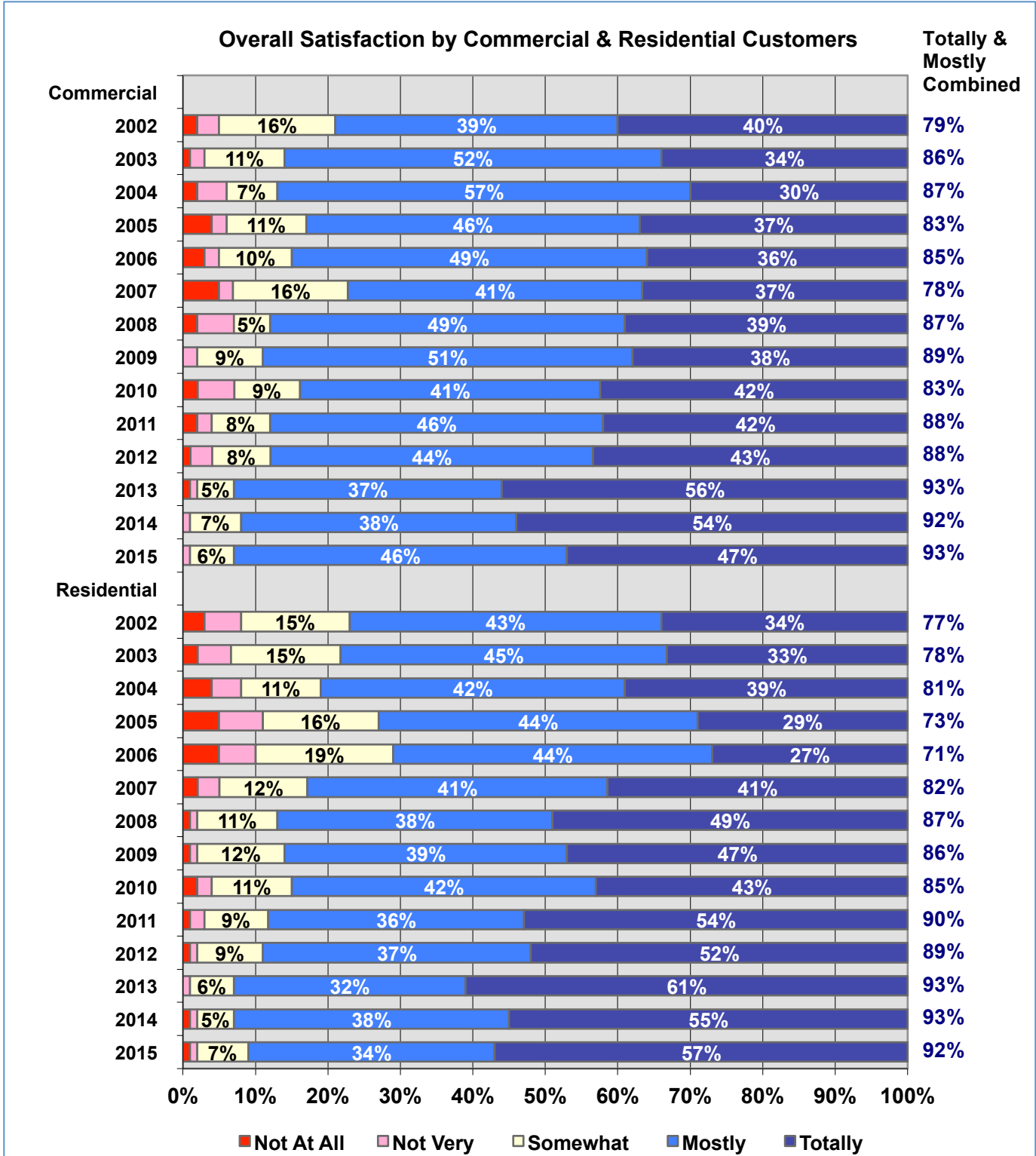
SUMMARY OF FINDINGS

Overall Satisfaction with TMWA



In 2015, 92% of respondents expressed a positive level of satisfaction with TMWA by indicating that they were either mostly or totally satisfied; this is statistically similar to the score of 93% in both 2014 and 2013, and up from 89% in both 2012 and 2011. This is 19 percentage points higher than the low of 73% in 2006.

In 2015, 55% of respondents were totally satisfied, while 37% were mostly satisfied, 7% were somewhat satisfied, and just 1% of respondents were either not very satisfied or not at all satisfied with TMWA; these scores are statistically similar to the scores from the previous year.



In 2015, 93% of commercial respondents and 92% of residential respondents expressed a positive level of satisfaction (totally and mostly satisfied combined) with TMWA. Overall satisfaction scores did not change significantly from the prior two years for either commercial or residential customers; these scores have been either 92% or 93% for both commercial and residential customers since 2013.

Key Drivers of Overall Satisfaction in 2015

For Commercial Respondents	
Commercial	Having low levels of concern about rate increases

For Residential Respondents – By Whether They Have a Lawn That they Water	
Have a lawn that they water <i>(73% of residential respondents)</i>	Perceiving that TMWA responds to customer service problems quickly and effectively
Do not have a lawn that they water <i>(27% of residential respondents)</i>	Perceiving that the water bill is easy to read and understand

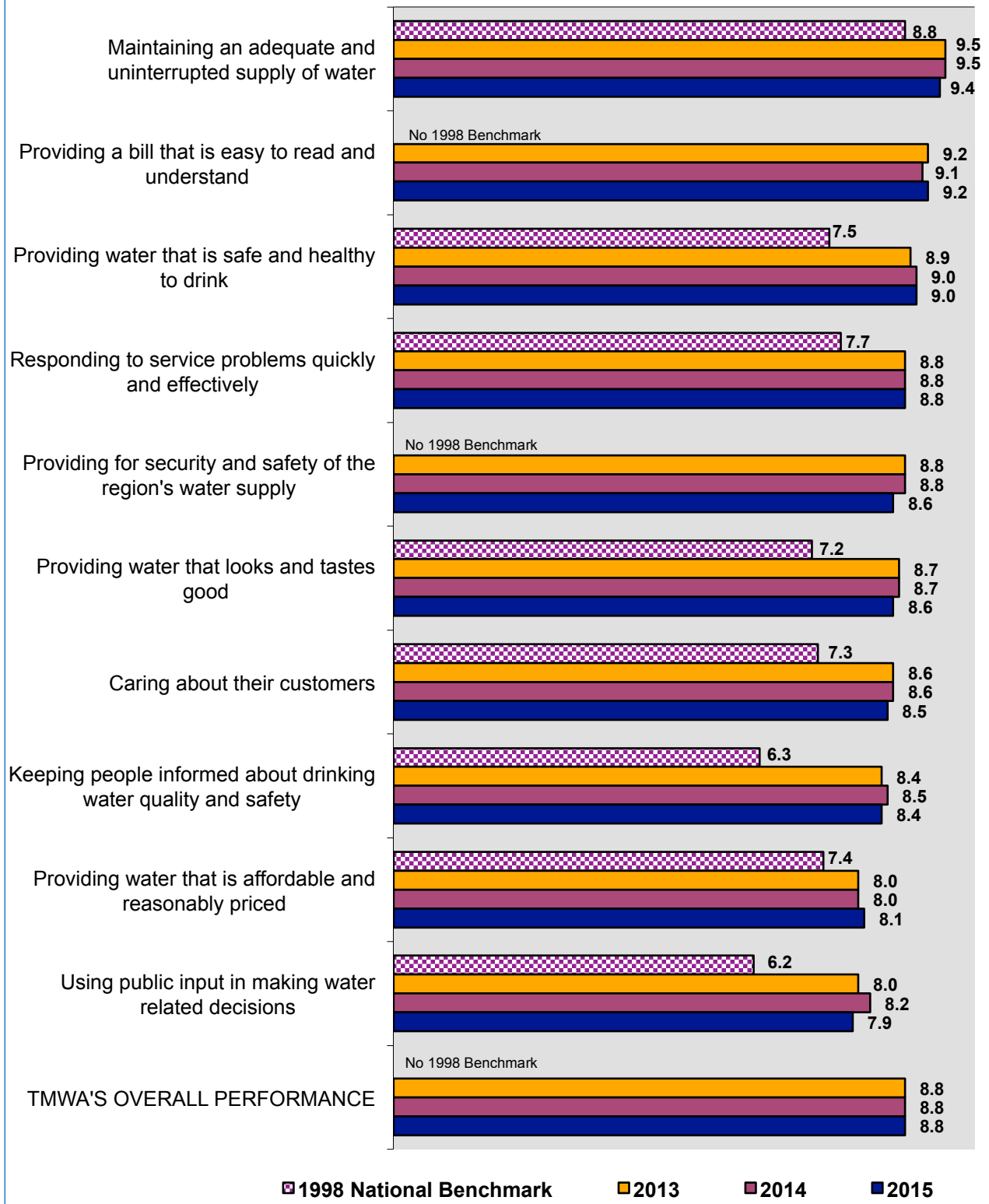
Performance Ratings

The chart on the [next page](#) shows customers' ratings for 10 specific performance measures plus overall performance on a scale from 0 (very poor job) to 10 (excellent job).

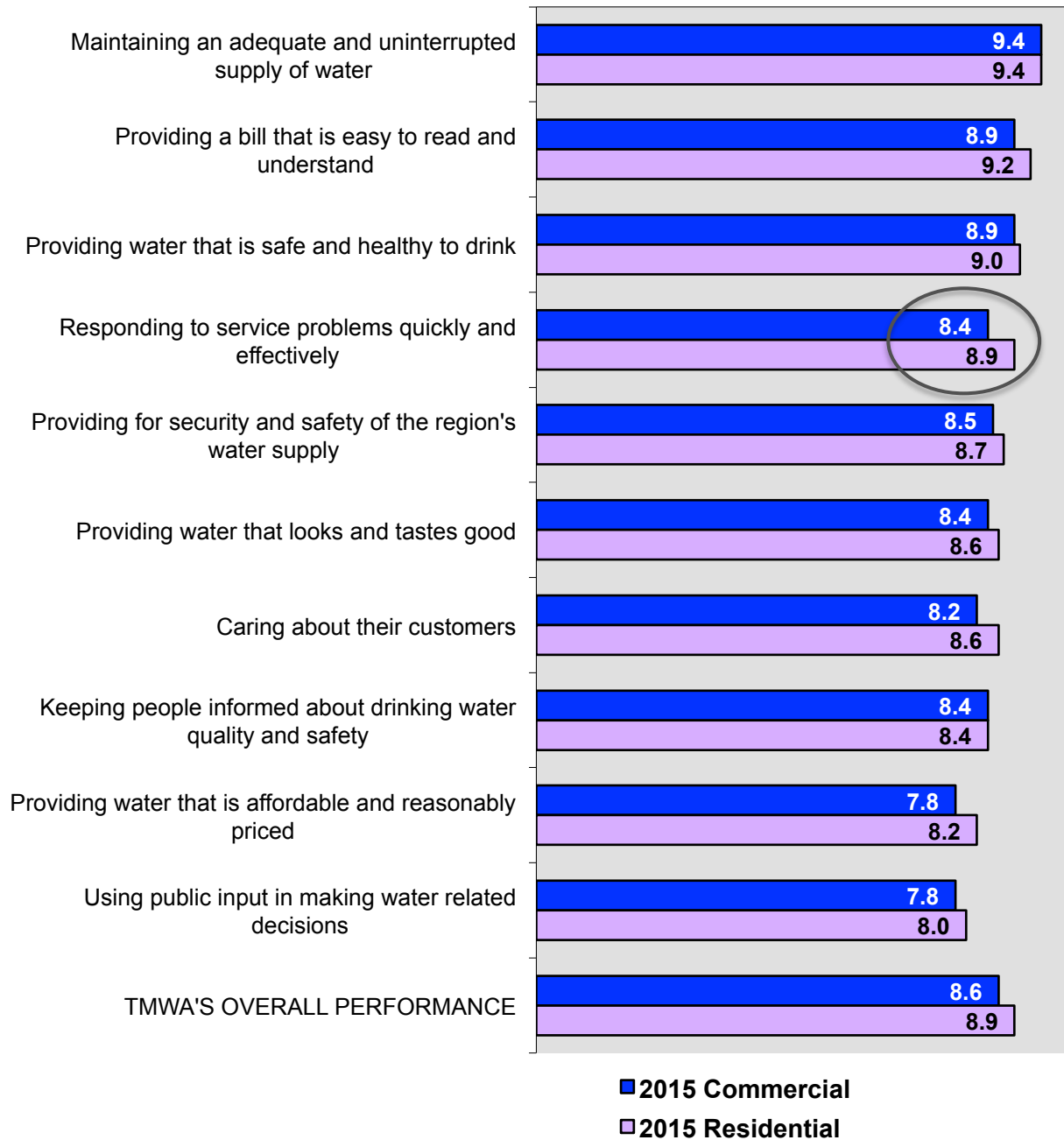
Of the items measured, maintaining an adequate water supply continued to receive the highest rating (mean = 9.4) in 2015, while using public input in making water related decision received the lowest rating (mean = 7.9).

All ten performance ratings have remained statistically stable over the past three years (since 2013). Additionally, TMWA continued to score higher than the national benchmark (set in 1998) for all 8 attributes that have benchmarks.

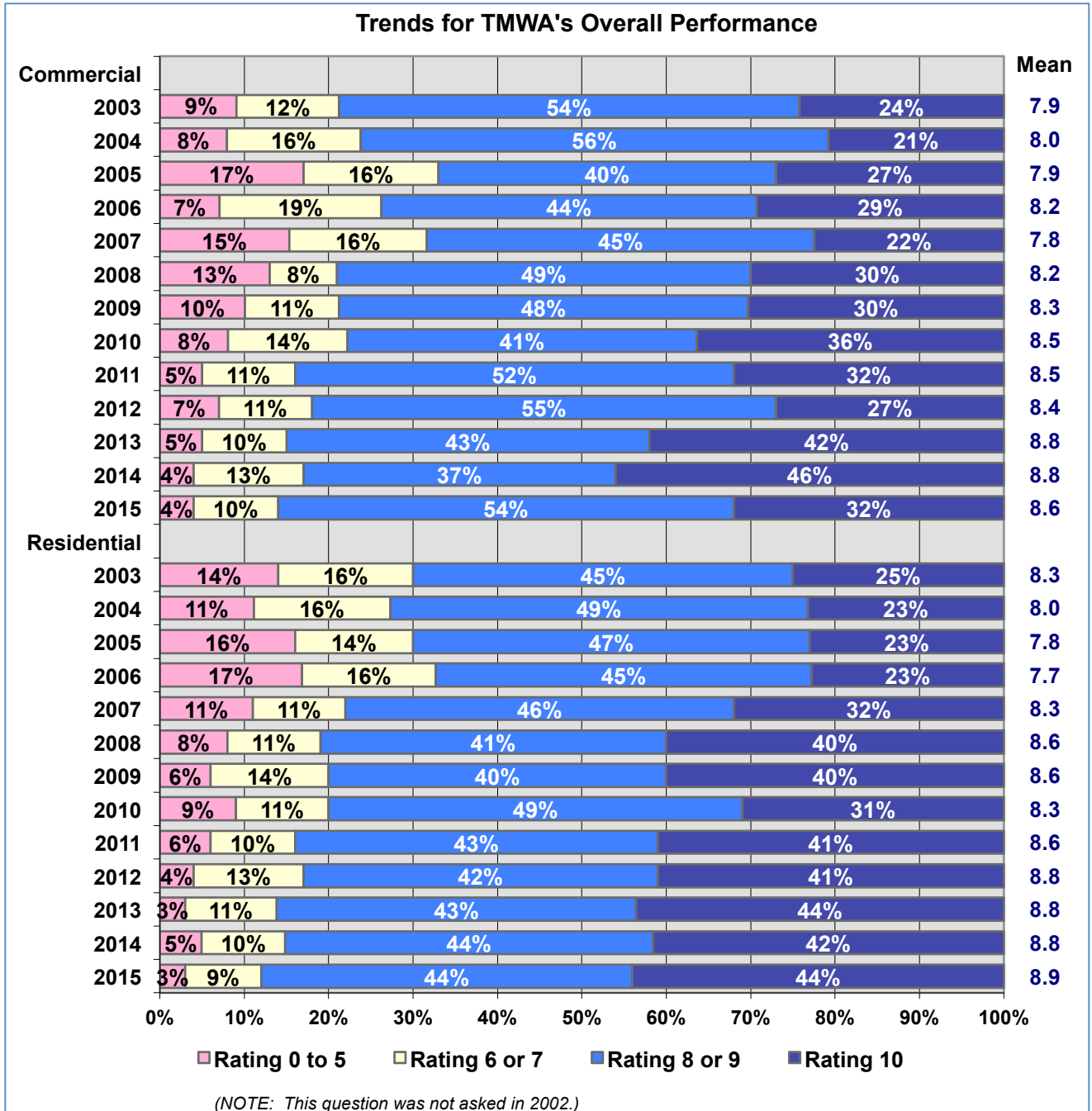
**Three Year Comparison of Performance Ratings - with National Benchmarks
(Mean Scores on a Scale from 0 "Very Poor Job" to 10 "Excellent Job")**



**2015 Performance Ratings by Commercial & Residential Customers
(Mean Scores on a Scale from 0 "Very Poor Job" to 10 "Excellent Job")**



In 2015, residential customers provided a significantly higher rating (8.9) than did commercial customers (8.4) for responding to service problems quickly and effectively. The other performance ratings for residential and commercial customers were statistically similar.

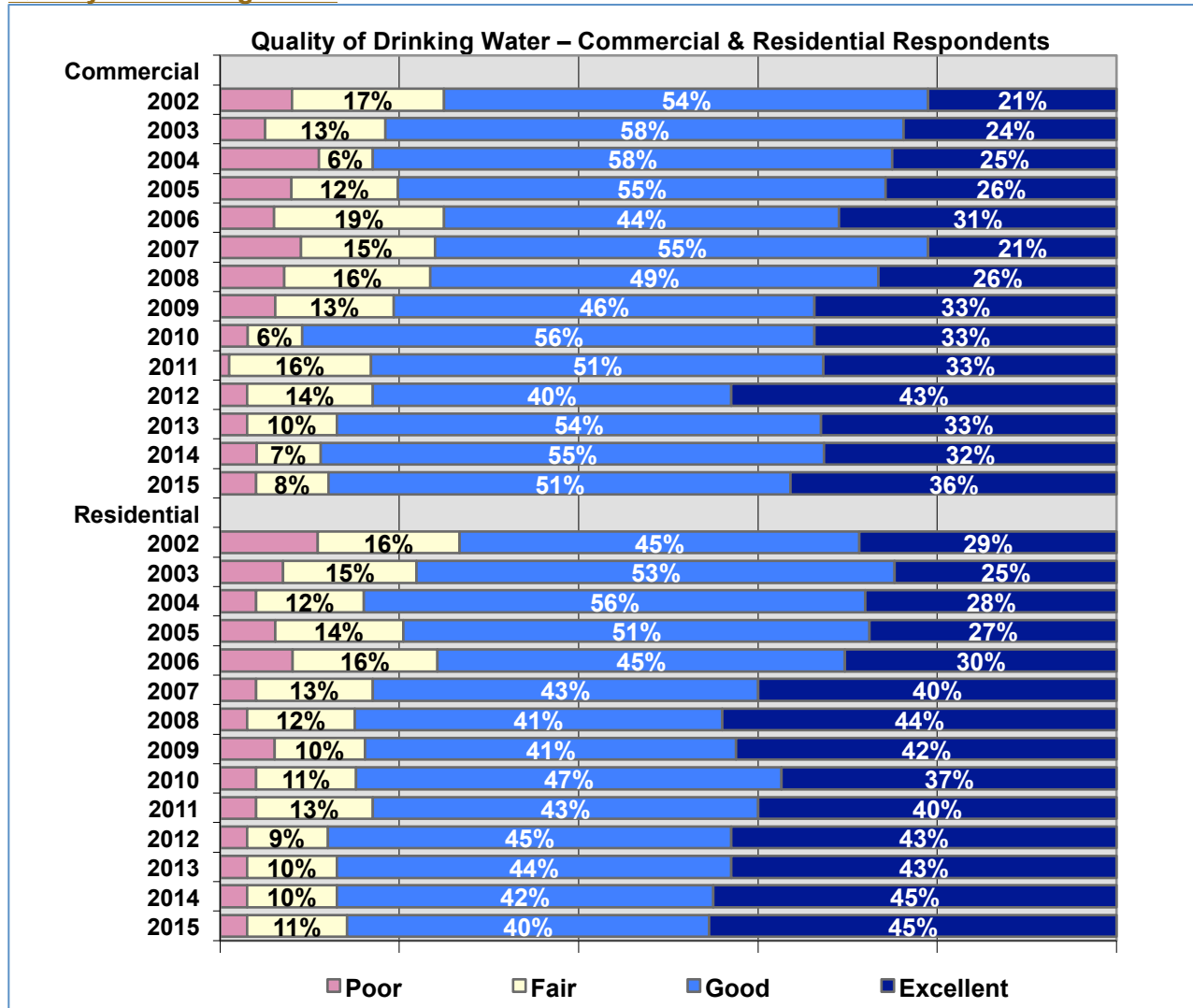


In 2015, 86% of commercial respondents and 88% of residential respondents provided an overall performance score of an 8 or higher on the 0-to-10 scale. Compared to the prior two years, the overall performance scores remained statistically similar for both commercial and residential customers.

Customer Service

Just 4% of respondents noticed any changes in their water service in the preceding 12 months. One out of four (27%) had contacted TMWA, which was up significantly from 12% in 2014 and 16% in 2013. The most common reasons for contacting TMWA in 2015 were billing questions (36%), new service connections (12%), a change of service (10%), and water leaks (10%).

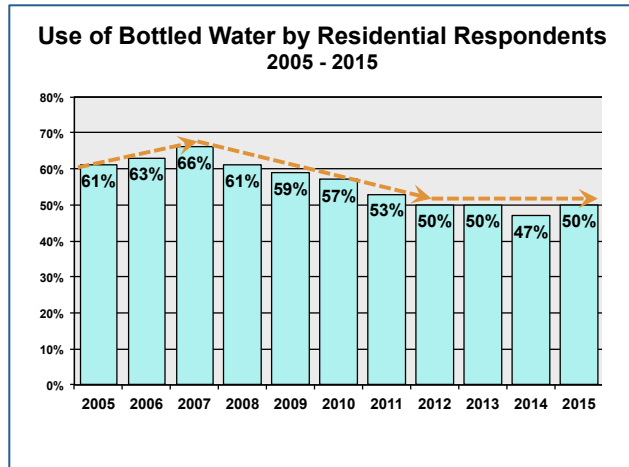
Quality of Drinking Water



Overall, 85% of all respondents – including 87% of commercial respondents and 85% of residential respondents – rated drinking water quality as either excellent or good in 2015. Three out of four (77%) reported rarely or never having problems with the taste of drinking water, similar to 75% last year.

Nearly all respondents (92%) noted no difference in drinking water quality compared to one year ago; 5% reported that the quality was better and 3% said it was worse. Over half (55%) reported that the quality of the tap water is better than that of other cities; only 7% reported that it was worse.

The percentage of respondents who drank bottled water has declined from a high of 66% in 2007, but appears to have stabilized at about 50% over the past four years, including 50% in 2015. The most common reason for drinking bottled water continued to be convenience (59%).

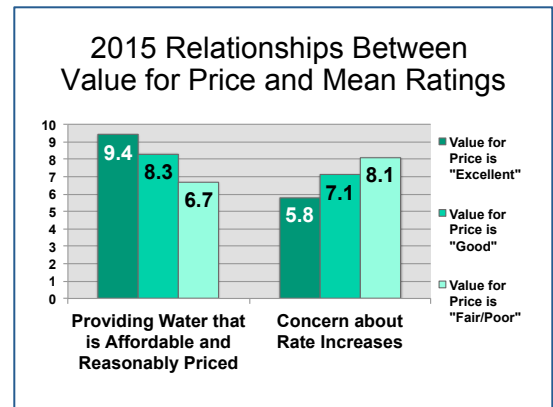


Value for Price

When asked to relate the price of their water bill to the value of the water quality and services received, 24% indicated they received an excellent value in 2015, while another 47% rated the value as good, 27% said it was fair, and 3% said the value was poor.

The percentage who rated the value for price as excellent or good was 71%, down from 79% in 2014 and closer to 74% in 2014. Compared to last year, excellent ratings dropped from 30% to 24%, while fair ratings increased from 17% to 27%.

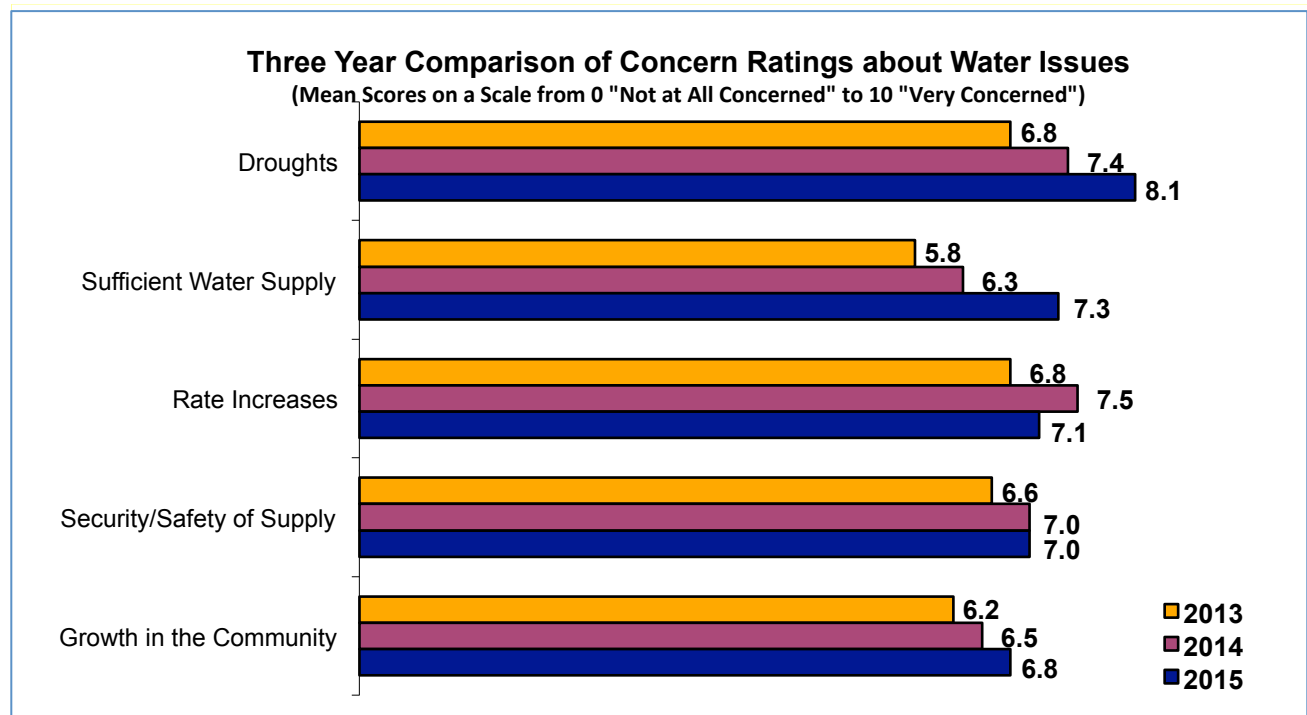
In 2015, respondents who rated the value for price as excellent provided a very high rating (9.4) for TMWA's performance on providing water that is affordable, and they were only moderately concerned about rate increases (5.8). Conversely, respondents who rated the value for price as either fair or poor provided a moderate rating (6.7) for providing water that is affordable, and they were very concerned (8.1) about rate increases.



Customers' Concerns

Of the five concerns measured, respondents in 2015 were the most concerned about droughts and the least concerned about community growth. Compared to 2014, the level of concern about droughts, a sufficient water supply, and community growth all increased, while the level of concern about rate increases rebounded down. In terms of rankings, a sufficient water supply jumped from being the #5 concern last year to the #2 concern (behind droughts) in 2015, while rate increases declined from being the #1 concern last year to #3 in 2015.

In 2015, commercial respondents were significantly more concerned than were residential respondents about having a sufficient water supply, rate increases, the security/safety of the water supply and community growth. Commercial and residential respondents shared a similarly high level of concern about droughts.



Communication and Issue Awareness

Three out of five respondents (62%) who paid by mail read the water bill insert at least occasionally. Half (50%) read the message printed on the front page of their bill, down from 62% in 2014 and 61% in 2013.

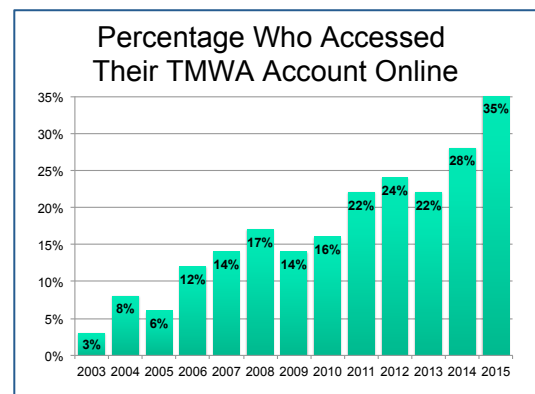
More respondents indicated that they receive most of their information about the quality and safety of their drinking water from the local news/media (25%) rather than TMWA (19%), although more respondents would prefer to receive most of this information from TMWA (32%) than the local news/media (17%). Nearly half (46%) of the respondents, however, would prefer to get most of their information about drinking water from both the local news/media and TMWA.

Almost all (92%) were aware of “Assigned Day” watering. Overall, 70% reported having a lawn that they water. Among those who have a lawn and were aware of Assigned Day watering, three out of four (73%) reported that they could water their lawn 3 days a week. Additionally, 91% reported that they modify their sprinkler usage based on the actual weather.

One out of four respondents (24%) reported, correctly, that TMWA is a not-for-profit utility, while 26% reported that it was a for-profit utility, and half (51%) did not know. Among those who perceived TMWA to be a not-for-profit utility, 55% were totally satisfied as customers; among those who perceived TMWA to be a for-profit utility, 44% were totally satisfied. Overall, just 16% of all respondents (4% unaided and 12% aided) were able to correctly identify that elected officials from Washoe County, the City of Reno, and the City of Sparks provide oversight for TMWA.

Online Account Information

In 2014, four out of five respondents (82%) indicated that they were aware they could view their TMWA account online; this figure has been 78-83% over the past five years. More than one out of three respondents (35%) had accessed their online account, up from 28% last year and the highest percentage to date. The mean rating for satisfaction with the online account information system was 8.4 on a scale from 0-to-10.



Backflow Prevention Assemblies for Commercial Customers

Overall, 93% of commercial respondents in 2015, 2014 and 2013 indicated that their water service lines were equipped with backflow prevention assemblies. In 2015, 80% were aware that backflow assemblies need to be tested annually and 78% felt that TMWA provides adequate information about backflow maintenance. These results have been statistically stable over the past four years.

KEY DIFFERENCES BETWEEN GROUPS IN 2015

RESIDENTIAL VERSUS COMMERCIAL:

- **Residential** customers were more likely than were *commercial* customers to:
 - Provide higher ratings for responding to customer service problems quickly and for providing a water bill that is easy to read and understand.
 - Have a lawn that they water and report that they can water their lawn 3 days a week.
 - Report, incorrectly, that the Public Utility Commission of Nevada provides oversight for TMWA.
- **Commercial** customers were more likely than were *residential* customers to:
 - Be concerned about growth in the community, rate increases, having a sufficient water supply, and the security/safety of the water supply.

GENDER:

- **Male** respondents were more likely than were *female* respondents to:
 - Rate the drinking water quality as excellent and to say that they never have problems with the taste.
 - Report that they can water their lawn three days a week.
 - Report that they always read the bill insert.
 - Report that TMWA is a not-for-profit utility (while females were more likely to indicate that they did not know whether or not it is for-profit or who provides oversight).
- **Female** respondents were more likely than were *male* respondents to:
 - Report that they would prefer to get most of their information about drinking water from both the local news/media and TMWA.
 - Provide higher ratings for overall performance, as well as 8 specific performance measures: (1) responding to customer service problems quickly, (2) keeping people informed, (3) maintaining an adequate water supply, (4) using public input, (5) caring about customers, (6) providing water that is affordable/reasonably priced, (7) providing a water bill that is easy to read, and (8) providing for the security/safety of the water supply.
 - Be more concerned about droughts.
 - Provide higher ratings for the online account information system.

LENGTH OF RESIDENCY:

- **Newer** residents were more likely than were *longer-term* residents to:
 - Be totally satisfied as a TMWA customer.
 - Provide higher ratings for providing water that looks/tastes good, caring about customers, and providing water that is reasonably priced.
 - Report that their tap water is better than the tap water in other cities.
 - Be unsure if TMWA is a for-profit or not-for-profit utility.
- **Longer-term** residents were more likely than were *newer* residents to:
 - Be concerned about rate increases and the security/safety of the water supply.

LOT SIZE:

- Customers with **larger lot sizes** (¼ acre+) were more likely than were those with *smaller lots* to:
 - Have a lawn that they water.
 - Be concerned about droughts and a sufficient water supply.
 - Be aware that they can view their TMWA account online (although they were not more likely to have accessed this account).

HOUSEHOLD SIZE (NUMBER OF INHABITANTS):

- Respondents with **larger households** were more likely than were those with *smaller ones* to:
 - Be aware they can view their TMWA account online and to have accessed this account.
 - Have a lawn that they water and, if they have a lawn, to have a larger lawn.
 - Get information about their drinking water from the local news/media.

AGE GROUP:

- **Respondents under age 45** were more likely than were *older* ones to:
 - Be totally satisfied as a TMWA customer.
 - Have contacted TMWA and, if they contacted TMWA, to have done so for a new service connection or a change of service.
 - Be aware they can view their TMWA account online and to have accessed this account.
- **Respondents age 45 to 64** were more likely than were either *younger or older* ones to:
 - Provide lower ratings for TMWA's overall performance.
 - Provide lower ratings for providing water that is affordable/reasonably priced and to rate the value for price of drinking water as fair.
 - Drink bottled water because they are worried about the health and safety of the water.
 - Be concerned about community growth and having a sufficient water supply.
 - Have a lawn that they water.
- **Respondents age 65 or older** were more likely than were *younger* ones to:
 - Report that they always read the bill insert and the message on the front page of the bill.
 - Be concerned about droughts, rate increases, and the security/safety of the water supply.

INCOME GROUP:

- Respondents with **higher household incomes** were more likely to:
 - Report that they "never" have problems with the taste of the drinking water.

RACE/ETHNICITY:

- **Minority** respondents were more likely than were *White/Caucasian* respondents to:
 - Report that the quality of their drinking water is better than one year ago.
- **White/Caucasian** respondents were more likely than were *minority* respondents to:
 - Be aware of Assigned Day watering and to modify sprinkler usage based on the weather.
 - Be aware that they can view their TMWA account online (although they were not more likely to have accessed this account).

SIGNIFICANT CHANGES FROM 2013 TO 2015 *(Three Years of Trending)*

SIGNIFICANT INCREASES IN 2015	2013	2014	2015
Mean Ratings on 0-10 Scale:			
Concern about a sufficient water supply	5.8	6.3	7.3
Concern about droughts	6.9	7.4	8.1
Concern about community growth	6.2	6.5	6.8
Obtain information about drinking water from <u>both</u> news/media and TMWA	27%	35%	41%
Percentages:			
Contacted TMWA in the prior 12 months	16%	12%	27%
Do not know who provides oversight for TMWA	70%	64%	74%
Accessed their TMWA account online (based on all respondents)	22%	28%	35%

SIGNIFICANT DECREASES IN 2015	2013	2014	2015
Mean Ratings on 0-10 Scale:			
Concern about rate increases	6.8	7.5	7.1
Percentages:			
Value for price of water is excellent or good	74%	79%	71%
Read message on front page of bill	61%	62%	50%
Reported that TMWA is a for-profit entity	27%	35%	24%
Among commercial respondents, business has landscaping that is maintained	81%	69%	58%

2015 DETAILED FINDINGS

OVERALL SATISFACTION

Overall, how satisfied are you as a customer with your water company?

Sample Characteristics		Percent Responding				
		Totally Satisfied	Mostly Satisfied	Somewhat Satisfied	Not Very Satisfied	Not at All Satisfied
Total		55.4%	36.8%	6.5%	1.0%	0.4%
Customer Type	Commercial	47.0%	46.0%	6.0%	1.0%	0.0%
	Residential	57.5%	34.4%	6.6%	1.0%	0.5%
Gender	Male	55.1%	35.0%	9.0%	0.4%	0.4%
	Female	55.6%	38.3%	4.2%	1.5%	0.4%
Length of Residency	Less than 5 years	72.5%	24.5%	2.9%	0.0%	0.0%
	5 < 10 years	68.0%	24.0%	6.0%	0.0%	2.0%
	10 < 20 years	49.4%	36.4%	10.4%	2.6%	1.3%
	20 + years	48.5%	43.6%	6.7%	1.2%	0.0%
Lot Size	Under ¼ of acre	58.2%	32.7%	7.3%	1.8%	0.0%
	¼ of acre or more	55.7%	37.6%	5.4%	0.0%	1.3%
Number in Household	1	48.4%	40.6%	7.8%	1.6%	1.6%
	2	57.9%	35.5%	4.6%	1.5%	0.5%
	3 or more	61.5%	30.0%	8.5%	0.0%	0.0%

In 2015, more than nine out of ten respondents (92%) were either totally (55%) or mostly (37%) satisfied with the water company, similar to 93% in both 2014 and 2013. Additionally, in 2015, 7% were somewhat satisfied, and just 1% were either not very satisfied or not at all satisfied.

The longer the length of residency, the more likely respondents were to be mostly, rather than totally, satisfied as TMWA customers.

PERFORMANCE RATINGS

Using a scale from 0-to-10 where 0 means a very poor job and 10 means an excellent job, how would you rate your water company for:
PROVIDING WATER THAT IS SAFE AND HEALTHY TO DRINK

Sample Characteristics		Statistics	
		Mean	Median
Total		9.0	10.0
Customer Type	Commercial	8.9	10.0
	Residential	9.0	10.0
Gender	Male	9.0	10.0
	Female	9.1	10.0
Length of Residency	< 5 Years	9.3	10.0
	5 < 10 Years	8.9	10.0
	10 < 20 Years	8.7	9.0
	20+ Years	9.0	10.0
Lot Size	Under ¼ Acre	9.0	10.0
	¼ Acre or More	9.1	10.0
Number in Household	1 Person	8.9	10.0
	2 People	9.0	10.0
	3+ People	9.1	10.0

In 2015, respondents rated **providing water that is safe and healthy to drink** as a 9.0 on the 0-to-10 scale; this is the same score as in 2014 and statistically similar to the 8.8 to 8.9 scores in 2011 to 2103. The 2015 score of 9.0 was higher than the scores of 8.5 to 8.7 that were provided in 2008 to 2010.

Using a scale from 0-to-10 where 0 means a very poor job and 10 means an excellent job, how would you rate your water company for:
PROVIDING WATER THAT LOOKS AND TASTES GOOD

Sample Characteristics		Statistics	
		Mean	Median
Total		8.6	9.0
Customer Type	Commercial	8.4	9.0
	Residential	8.6	9.0
Gender	Male	8.7	9.0
	Female	8.5	9.0
Length of Residency	< 5 Years	9.0	10.0
	5 < 10 Years	8.6	9.0
	10 < 20 Years	8.0	9.0
	20+ Years	8.7	9.0
Lot Size	Under ¼ Acre	8.6	9.0
	¼ Acre or More	8.6	9.0
Number in Household	1 Person	8.7	10.0
	2 People	8.6	9.0
	3+ People	8.6	9.0

For **providing water that looks and tastes good**, respondents rated TMWA an 8.6 on the 0-to-10 scale. This score was statistically similar to the score of 8.7 in the prior three years (2014, 2013, and 2012), as well as the score of 8.5 in 2011. The 2015 score of 8.6 continued to be higher than the scores of 8.2 or 8.3 in 2008 to 2010.

Newer residents with less than 5 years of residency gave the highest average rating for providing water that looks and tastes good.

Using a scale from 0-to-10 where 0 means a very poor job and 10 means an excellent job, how would you rate your water company for:
RESPONDING TO CUSTOMER SERVICE PROBLEMS QUICKLY AND EFFECTIVELY

Sample Characteristics		Statistics	
		Mean	Median
Total		8.8	9.0
Customer Type	Commercial	8.4	9.0
	Residential	8.9	10.0
Gender	Male	8.6	9.0
	Female	9.0	10.0
Length of Residency	< 5 Years	9.1	10.0
	5 < 10 Years	9.3	10.0
	10 < 20 Years	8.9	10.0
	20+ Years	8.8	9.5
Lot Size	Under ¼ Acre	8.9	10.0
	¼ Acre or More	8.9	10.0
Number in Household	1 Person	9.1	10.0
	2 People	9.0	10.0
	3+ People	8.8	9.5

On average, customers rated TMWA's **responding to customer service problems quickly and effectively** an 8.8 in 2015; this was the same score as in the prior three years (2014, 2013 and 2012), and similar to the score of 8.6 in 2011. This rating has increased from the scores of 8.3 to 8.5 in 2008 to 2010.

In 2015, residential customers provided a higher rating than did commercial customers for responding to customer service problems quickly and effectively.

On average, women provided a higher rating for this attribute than did men.

Using a scale from 0-to-10 where 0 means a very poor job and 10 means an excellent job, how would you rate your water company for:
KEEPING PEOPLE INFORMED ABOUT DRINKING WATER QUALITY AND SAFETY

Sample Characteristics		Statistics	
		Mean	Median
Total		8.4	9.0
Customer Type	Commercial	8.4	9.0
	Residential	8.4	9.0
Gender	Male	8.1	8.5
	Female	8.7	9.0
Length of Residency	< 5 Years	8.6	9.0
	5 < 10 Years	8.5	9.0
	10 < 20 Years	8.0	8.0
	20+ Years	8.4	9.0
Lot Size	Under ¼ Acre	8.3	9.0
	¼ Acre or More	8.4	9.0
Number in Household	1 Person	8.5	9.0
	2 People	8.4	9.0
	3+ People	8.3	9.0

When considering the water company's performance **in keeping people informed about drinking water quality and safety**, customers provided a mean rating of 8.4, which was statistically similar to the score of 8.5 in 2014 and was the same (8.4) as in 2013 and 2012. The 2015 score continued to be higher than the scores of 8.0 to 8.2 in 2008 to 2011.

On average, women provided a higher rating than did men for TMWA keeping people informed.

Using a scale from 0-to-10 where 0 means a very poor job and 10 means an excellent job, how would you rate your water company for:
MAINTAINING AN ADEQUATE AND UNINTERRUPTED SUPPLY OF WATER

Sample Characteristics		Statistics	
		Mean	Median
Total		9.4	10.0
Customer Type	Commercial	9.4	10.0
	Residential	9.4	10.0
Gender	Male	9.3	10.0
	Female	9.6	10.0
Length of Residency	< 5 Years	9.5	10.0
	5 < 10 Years	9.5	10.0
	10 < 20 Years	9.4	10.0
	20+ Years	9.4	10.0
Lot Size	Under ¼ Acre	9.5	10.0
	¼ Acre or More	9.4	10.0
Number in Household	1 Person	9.3	10.0
	2 People	9.5	10.0
	3+ People	9.5	10.0

Respondents indicated that TMWA does an excellent job of **maintaining an adequate and uninterrupted supply of water**; it continued to be the highest rated attribute of the 10 performance measures studied.

In 2015, the mean score for this attribute was 9.4, which is statistically similar to the score of 9.5 in the prior three years (2014, 2013, and 2012). This score has been at least 9.2 since 2008.

Additionally, in 2015, this attribute received mean ratings of at least 9.3 across all the demographic sub-groups listed.

On average, women provided a higher rating than did men for maintaining an adequate and uninterrupted water supply.

Using a scale from 0-to-10 where 0 means a very poor job and 10 means an excellent job, how would you rate your water company for:
USING PUBLIC INPUT IN MAKING WATER RELATED DECISIONS

Sample Characteristics		Statistics	
		Mean	Median
Total		7.9	8.0
Customer Type	Commercial	7.8	8.0
	Residential	8.0	8.0
Gender	Male	7.5	8.0
	Female	8.3	9.0
Length of Residency	< 5 Years	8.5	9.0
	5 < 10 Years	7.6	8.0
	10 < 20 Years	7.9	8.0
	20+ Years	7.7	8.0
Lot Size	Under ¼ Acre	8.1	8.0
	¼ Acre or More	7.6	8.0
Number in Household	1 Person	7.9	8.0
	2 People	7.9	8.0
	3+ People	8.1	8.0

When asked to rate TMWA's performance in **using public input in making water related decisions**, customers provided a mean rating of 7.9 in 2015. This rating received the lowest score of the ten specific performance attributes measured.

This rating has remained statistically stable in the 7.9 to 8.2 range since 2012. For comparison, the score was 7.6 in 2011 and 7.0 to 7.1 from 2008 to 2010.

On average, women provided a higher rating than did men for using public input.

**Using a scale from 0-to-10 where 0 means a very poor job and 10 means an excellent job, how would you rate your water company for:
CARING ABOUT THEIR CUSTOMERS**

Sample Characteristics		Statistics	
		Mean	Median
Total		8.5	9.0
Customer Type	Commercial	8.2	9.0
	Residential	8.6	9.0
Gender	Male	8.2	9.0
	Female	8.8	9.0
Length of Residency	< 5 Years	9.0	10.0
	5 < 10 Years	8.8	9.0
	10 < 20 Years	8.1	9.0
	20+ Years	8.4	9.0
Lot Size	Under ¼ Acre	8.6	9.0
	¼ Acre or More	8.4	9.0
Number in Household	1 Person	8.7	10.0
	2 People	8.5	9.0
	3+ People	8.6	9.0

When asked how well TMWA does at **caring about their customers**, respondents gave a mean score of 8.5 in 2015; this was statistically similar to the scores of 8.6 in both 2014 and 2013, 8.4 in 2012, and 8.3 in 2011. This is higher than the scores of 7.8 to 8.0 in 2008 to 2010.

On average, women provided a higher rating than did men for TMWA caring about their customers.

Additionally, respondents with less than 5 years of residency provided the highest average rating for TMWA caring about their customers.

Using a scale from 0-to-10 where 0 means a very poor job and 10 means an excellent job, how would you rate your water company for:
PROVIDING WATER THAT IS AFFORDABLE AND REASONABLY PRICED

Sample Characteristics		Statistics	
		Mean	Median
Total		8.1	8.0
Customer Type	Commercial	7.8	8.0
	Residential	8.2	8.0
Gender	Male	7.8	8.0
	Female	8.3	9.0
Length of Residency	< 5 Years	8.7	9.0
	5 < 10 Years	8.6	10.0
	10 < 20 Years	8.0	8.0
	20+ Years	7.8	8.0
Lot Size	Under ¼ Acre	8.1	8.0
	¼ Acre or More	8.1	8.0
Number in Household	1 Person	8.3	9.0
	2 People	8.2	8.0
	3+ People	8.2	8.0

When considering TMWA's performance in 2015 in **providing water that is affordable and reasonably priced**, respondents gave a mean score of 8.1, which was statistically similar to the scores of 8.0 in both 2014 and 2013, and higher than the scores of 7.2 to 7.8 in 2008 to 2012.

On average, women provided a higher rating than did men for providing water that is affordable and reasonably priced.

In general, the shorter the length of residency, the higher the average rating for providing water that is affordable and reasonably priced.

Using a scale from 0-to-10 where 0 means a very poor job and 10 means an excellent job, how would you rate your water company for:
PROVIDING A WATER BILL THAT IS EASY TO READ AND UNDERSTAND

Sample Characteristics		Statistics	
		Mean	Median
Total		9.2	10.0
Customer Type	Commercial	8.9	10.0
	Residential	9.2	10.0
Gender	Male	9.0	10.0
	Female	9.3	10.0
Length of Residency	< 5 Years	9.3	10.0
	5 < 10 Years	9.3	10.0
	10 < 20 Years	9.3	10.0
	20+ Years	9.2	10.0
Lot Size	Under ¼ Acre	9.2	10.0
	¼ Acre or More	9.2	10.0
Number in Household	1 Person	9.4	10.0
	2 People	9.2	10.0
	3+ People	9.2	10.0

When asked to rate how well the water company does at **providing a water bill that is easy to read and understand**, customers provided a mean rating of 9.2 in 2015. This score has been consistently in the 8.8 to 9.2 range from 2008 to 2015.

In 2015, residential customers provided a higher average rating than did commercial customers for providing a water bill that is easy to read and understand.

On average, women provided a higher rating for this attribute than did men.

Using a scale from 0-to-10 where 0 means a very poor job and 10 means an excellent job, how would you rate your water company for:
PROVIDING FOR SECURITY AND SAFETY OF THE REGION'S WATER SUPPLY

Sample Characteristics		Statistics	
		Mean	Median
Total		8.6	9.0
Customer Type	Commercial	8.5	9.0
	Residential	8.7	9.0
Gender	Male	8.3	9.0
	Female	8.9	10.0
Length of Residency	< 5 Years	9.0	10.0
	5 < 10 Years	8.6	9.0
	10 < 20 Years	8.6	9.0
	20+ Years	8.5	9.0
Lot Size	Under ¼ Acre	8.8	9.0
	¼ Acre or More	8.4	9.0
Number in Household	1 Person	8.6	9.0
	2 People	8.6	9.0
	3+ People	8.8	9.0

Respondents supplied a mean score of 8.6 for **providing for security and safety of the region's water supply**, which was statistically similar to 8.8 in 2011 to 2014. This is higher than the scores of 8.1 to 8.3 in 2008 to 2010.

On average, women provided a higher rating than did men for providing for the security and safety of the region's water supply.

Using a scale from 0-to-10 where 0 means a very poor job and 10 means an excellent job, how would you rate the job your water company is doing currently?

Sample Characteristics		Statistics	
		Mean	Median
Total		8.8	9.0
Customer Type	Commercial	8.6	9.0
	Residential	8.9	9.0
Gender	Male	8.7	9.0
	Female	9.0	9.0
Length of Residency	< 5 Years	9.1	10.0
	5 < 10 Years	8.9	9.0
	10 < 20 Years	8.8	9.0
	20+ Years	8.8	9.0
Lot Size	Under ¼ Acre	8.9	9.0
	¼ Acre or More	8.7	9.0
Number in Household	1 Person	8.9	9.0
	2 People	8.8	9.0
	3+ People	9.0	9.0

When considering TMWA’s **overall performance**, customers gave a mean rating of 8.8 in 2015; this is the same score as in both 2014 and 2013. This is also similar to the ratings of 8.7 in 2012 and 8.6 in 2011, yet higher than the scores of 8.4 to 8.5 in 2008 to 2010.

On average, women provided a higher rating than did men for TMWA’s overall performance.

CUSTOMER SERVICE

During the past 12 months have you seen any changes in your water service?

Sample Characteristics		Percent Responding	
		Yes	No/Don't Know
Total		4.4%	95.6%
Customer Type	Commercial	4.0%	96.0%
	Residential	4.5%	95.5%
Gender	Male	5.5%	94.5%
	Female	3.4%	96.6%
Length of Residency	< 5 Years	2.9%	97.1%
	5 < 10 Years	8.0%	92.0%
	10 < 20 Years	5.1%	94.9%
	20+ Years	4.2%	95.8%
Lot Size	Under ¼ Acre	3.6%	96.4%
	¼ Acre or More	5.4%	94.6%
Number in Household	1 Person	3.1%	96.9%
	2 People	4.0%	96.0%
	3+ People	6.1%	93.9%

In 2015, just 4% of respondents noticed any changes in their water service in the preceding 12 months.

The percentage who noticed a change in their water service has typically been in the 3% to 5% range from 2008 to 2015, although less than 1% of respondents reported a noticeable change in 2014.

During the past 12 months have you contacted your water company?

Sample Characteristics		Percent Responding	
		Yes	No
Total		27.2%	72.8%
Customer Type	Commercial	27.0%	73.0%
	Residential	27.3%	72.8%
Gender	Male	28.6%	71.4%
	Female	26.0%	74.0%
Length of Residency	< 5 Years	26.2%	73.8%
	5 < 10 Years	30.0%	70.0%
	10 < 20 Years	29.1%	70.9%
	20+ Years	26.1%	73.9%
Lot Size	Under ¼ Acre	26.9%	73.1%
	¼ Acre or More	28.2%	71.8%
Number in Household	1 Person	24.6%	75.4%
	2 People	26.0%	74.0%
	3+ People	31.3%	68.7%

In 2015, more than one out of four respondents (27%) indicated that they had **contacted TMWA** in the preceding 12 months, which was significantly higher than 12% in 2014 and 16% in 2013 who had contacted TMWA. This was also higher than the 21% to 23% who had contacted TMWA between 2008 and 2012.

Why did you contact your water company?

Percent Responding	Total
Billing Questions	36.0%
New Service Connection	11.8%
Change of Service	10.3%
Water Leaks	9.6%
Relocating	5.9%
Payment Arrangements	4.4%
Concerns with Your Water Quality	2.9%
Customer Service Issues	2.9%
Interruption of Service	2.2%
Rate Questions	2.2%
Water Pressure Concerns	1.5%
Reconnection Service	1.5%
Other	8.8%
Total Respondents	100.0%

Among the 27% of respondents who had contacted TMWA, the **primary reason for contacting the water company** continued to be having questions about the water bill. In both 2015 and 2014, 36% of those who contacted TMWA had billing questions. This has historically been the main reason for contacting TMWA, with 28% to 46% of respondents citing billing questions between 2008 and 2015.

In addition to billing questions, other reasons for contacting TMWA in 2015 included new service connections (12%), a change of service (10%), water leaks (10%), and relocation services (6%).

On a scale of 0-to-10 where 0 is not at all satisfied and 10 is extremely satisfied, how satisfied were you with the way your issue was handled?

Sample Characteristics		Statistics	
		Mean	Median
Total		8.6	10.0
Customer Type	Commercial	8.6	9.0
	Residential	8.6	10.0

Among the 27% of respondents who had contacted TMWA in 2015, their level of **satisfaction with the way their issue was handled** had a mean rating of 8.6 on a 0-to-10 scale. These ratings have been statistically stable in the 7.5 to 8.6 range from 2008 to 2015. (This range of fluctuation is not statistically significant with the smaller sub-set of respondents.)

NOTE: For more information about customer satisfaction with TMWA's service calls, please refer to the separate "TMWA Transactional" study.

WATER QUALITY

How would you rate the quality of the drinking water provided by Truckee Meadows Water Authority?

Sample Characteristics		Percent Responding				
		Excellent	Good	Fair	Poor	Refused
Total		43.3%	42.0%	10.6%	3.1%	1.0%
Customer Type	Commercial	36.1%	50.5%	8.2%	4.1%	1.0%
	Residential	45.0%	39.9%	11.2%	2.8%	1.0%
Gender	Male	49.1%	41.0%	6.4%	3.0%	0.4%
	Female	37.9%	43.0%	14.5%	3.1%	1.6%
Length of Residency	< 5 Years	47.1%	43.1%	7.8%	2.0%	0.0%
	5 < 10 Years	45.8%	37.5%	14.6%	2.1%	0.0%
	10 < 20 Years	31.2%	48.1%	14.3%	5.2%	1.3%
	20+ Years	49.7%	35.0%	11.0%	2.5%	1.8%
Lot Size	Under ¼ Acre	45.0%	38.5%	13.8%	2.3%	0.5%
	¼ Acre or More	43.2%	42.6%	9.5%	4.1%	0.7%
Number in Household	1 Person	46.0%	39.7%	9.5%	1.6%	3.2%
	2 People	46.4%	39.8%	11.2%	2.6%	0.0%
	3+ People	42.3%	40.8%	11.5%	3.8%	1.5%

Overall, 85% of respondents provided favorable ratings (excellent or good) for the **quality of drinking water** provided by TMWA; this score has been statistically stable and in the 82% to 87% range from 2008 to 2015.

More specifically, 43% of respondents rated drinking water quality as excellent; this was the same score as in 2014 and 2012, and was 41% in 2013.

Men were more likely than were women to rate the quality of drinking water as excellent.

Perceptions of drinking water quality were strongly related to overall satisfaction. Two out of three respondents (69%) who rated the drinking water quality as excellent were totally satisfied as TMWA customers, compared to half (51%) of those who rated the drinking water quality as good, one-third (35%) of those who rated it as fair, and just one out of eight (13%) of those who rated drinking water quality as poor.

Compared to one year ago, do you think the quality of the drinking water in your community today is better, worse, or about the same?

Sample Characteristics		Percent Responding		
		Better	Worse	About the Same
Total		4.9%	3.0%	92.2%
Customer Type	Commercial	7.3%	2.1%	90.6%
	Residential	4.2%	3.2%	92.6%
Gender	Male	6.6%	1.8%	91.6%
	Female	3.2%	4.0%	92.7%
Length of Residency	< 5 Years	5.6%	1.1%	93.3%
	5 < 10 Years	6.1%	6.1%	87.8%
	10 < 20 Years	2.7%	8.0%	89.3%
	20+ Years	3.1%	1.2%	95.7%
Lot Size	Under ¼ Acre	3.4%	3.9%	92.8%
	¼ Acre or More	4.2%	2.8%	93.0%
Number in Household	1 Person	4.6%	1.5%	93.8%
	2 People	3.2%	3.7%	93.1%
	3+ People	5.8%	3.3%	90.8%

In 2015, over nine out of ten respondents (92%) noted no difference in the **quality of drinking water** compared to one year ago; about 5% reported that the water quality was better than one year ago and 3% said it was worse.

From 2008 to 2015, between 91% and 95% of respondents have consistently indicated that the quality of drinking water has remained the same when compared to the prior year.

How often, if ever, do you have problems with the taste of your drinking water?

Sample Characteristics		Percent Responding				
		Always	Very Often	Sometimes	Rarely	Never
Total		8.3%	4.9%	10.0%	24.6%	52.2%
Customer Type	Commercial	10.8%	5.4%	9.7%	25.8%	48.4%
	Residential	7.7%	4.8%	10.1%	24.3%	53.2%
Gender	Male	4.8%	3.1%	9.3%	27.8%	55.1%
	Female	11.5%	6.6%	10.7%	21.7%	49.6%
Length of Residency	< 5 Years	5.1%	3.1%	6.1%	20.4%	65.3%
	5 < 10 Years	4.3%	6.5%	8.7%	26.1%	54.3%
	10 < 20 Years	13.7%	5.5%	12.3%	21.9%	46.6%
	20+ Years	7.6%	5.1%	12.0%	26.6%	48.7%
Lot Size	Under ¼ Acre	8.1%	5.7%	11.5%	23.4%	51.2%
	¼ Acre or More	8.5%	3.5%	8.5%	25.4%	54.2%
Number in Household	1 Person	13.1%	4.9%	9.8%	23.0%	49.2%
	2 People	5.3%	3.7%	12.7%	28.0%	50.3%
	3+ People	8.8%	5.6%	6.4%	19.2%	60.0%

Three out of four respondents (77%) reported rarely or never **having problems with the taste of the drinking water**. This rating was statistically similar last year (75%) and has been in the 74% to 82% range from 2008 to 2015.

More specifically, in 2015, over half the respondents (52%) reported never having problems with the taste, while one out of four (25%) said they rarely have problems, one out of ten (10%) sometimes have problems, 5% very often have problems, and 8% always have problems with the taste.

Women were more likely than were men to report that they either always or very often have problems with the taste of the drinking water.

Compared to the overall quality of tap water in other cities, do you think your tap water is better, the same, or worse than that of other cities?

Sample Characteristics		Percent Responding			
		Better	The Same	Worse	Don't Know
Total		55.1%	24.4%	7.2%	13.2%
Customer Type	Commercial	47.0%	34.0%	7.0%	12.0%
	Residential	57.1%	22.1%	7.3%	13.5%
Gender	Male	57.8%	22.8%	6.3%	13.1%
	Female	52.7%	26.0%	8.0%	13.4%
Length of Residency	< 5 Years	65.0%	17.5%	11.7%	5.8%
	5 < 10 Years	62.0%	20.0%	4.0%	14.0%
	10 < 20 Years	51.9%	24.1%	12.7%	11.4%
	20+ Years	52.4%	25.0%	3.0%	19.5%
Lot Size	Under ¼ Acre	60.1%	21.5%	6.3%	12.1%
	¼ Acre or More	54.1%	22.3%	8.8%	14.9%
Number in Household	1 Person	58.5%	15.4%	4.6%	21.5%
	2 People	58.5%	22.0%	7.5%	12.0%
	3+ People	53.8%	26.2%	8.5%	11.5%

Over half the respondents (55%) reported that the overall quality of their **tap water is better than that of other cities**; this percentage has been in the 54% to 62% from 2008 to 2015, including 59% last year and 57% in 2013.

In 2015, one out of four respondents (24%) reported that the quality of tap water is about the same as the quality found in other cities, while just 7% said it was worse, and 13% did not know.

In general, respondents who have lived in the area for less than 10 years were more likely than were those who have lived in the area for 10 or more years to say that their tap water was better than that of other cities.

Do you drink bottled water? (Residential respondents only)

Sample Characteristics		Percent Responding	
		Yes	No
Total		50.4%	49.6%
Gender	Male	51.7%	48.3%
	Female	49.0%	51.0%
Length of Residency	< 5 Years	48.5%	51.5%
	5 < 10 Years	62.0%	38.0%
	10 < 20 Years	46.2%	53.8%
	20+ Years	50.9%	49.1%
Lot Size	Under ¼ Acre	47.1%	52.9%
	¼ Acre or More	54.1%	45.9%
Number in Household	1 Person	38.5%	61.5%
	2 People	52.5%	47.5%
	3+ People	53.8%	46.2%

In 2015, 50% of residential respondents indicated that they **drink bottled water**, as compared to 47% in 2014 and 50% in both 2013 and 2012. The percentage declined from 53% in 2011, 57% in 2010, 59% in 2009, 61% in 2008, and a high of 66% in 2007, but appears to have stabilized at about 50% in the last four years.

Which of the following best describes your reason for drinking bottled water?

Sample Characteristics		Percent Responding			
		Worried about Health and Safety of Water	It's a Substitute for Soft Drinks, Coffee, etc.	For Convenience Reasons	Other
Total		12.8%	14.8%	58.7%	13.8%
Gender	Male	9.7%	12.6%	67.0%	10.7%
	Female	16.1%	17.2%	49.5%	17.2%
Length of Residency	< 5 Years	12.8%	23.4%	53.2%	10.6%
	5 < 10 Years	9.7%	9.7%	71.0%	9.7%
	10 < 20 Years	25.7%	5.7%	54.3%	14.3%
	20+ Years	8.4%	15.7%	59.0%	16.9%
Lot Size	Under ¼ Acre	15.0%	14.0%	54.0%	17.0%
	¼ Acre or More	8.8%	17.5%	65.0%	8.8%
Number in Household	1 Person	13.0%	13.0%	56.5%	17.4%
	2 People	14.6%	15.5%	57.3%	12.6%
	3+ People	10.1%	14.5%	60.9%	14.5%

Among the half of the residential respondents who reported that they drink bottled water, 59% indicated that their main **reason for drinking bottled water** was convenience, which has consistently been the dominant reason.

Additionally, 15% said that they drink bottled water as a substitute for other liquids, 13% reported that they drink it because they worry about the health and safety of tap water, and 14% provided other reasons for drinking bottled water including preferring the taste, wanting fewer chemicals, needing to easily track the amount consumed, and wanting each access to very cold water.

On a related note, there were **no significant relationships** between ratings for water quality or taste and whether respondents reported that they drink bottled water, which supports the finding that most respondents drink bottled water for convenience reasons.

VALUE FOR PRICE

Thinking of your average water bill, for the quality of water and services provided, would you say that the drinking water you receive is an excellent value, good value, fair value, or poor value for the price you pay for water?

Sample Characteristics		Percent Responding			
		Excellent	Good	Fair	Poor
Total		23.8%	46.8%	26.9%	2.5%
Customer Type	Commercial	20.0%	42.1%	35.8%	2.1%
	Residential	24.7%	48.0%	24.7%	2.6%
Gender	Male	26.4%	46.4%	24.3%	3.0%
	Female	21.4%	47.2%	29.4%	2.0%
Length of Residency	< 5 Years	26.5%	46.1%	25.5%	2.0%
	5 < 10 Years	28.6%	44.9%	24.5%	2.0%
	10 < 20 Years	20.5%	50.0%	25.6%	3.8%
	20+ Years	24.4%	49.4%	23.8%	2.5%
Lot Size	Under ¼ Acre	24.4%	47.5%	24.9%	3.2%
	¼ Acre or More	25.7%	46.5%	25.7%	2.1%
Number in Household	1 Person	27.0%	52.4%	20.6%	0.0%
	2 People	26.0%	45.9%	25.5%	2.6%
	3+ People	20.9%	49.6%	25.6%	3.9%

In 2015, 24% reported that the **value for the price paid** for drinking water and services received was excellent, while 47% rated it as good, 27% said fair, and another 3% said poor.

Overall, the percentage who rated the value for price as either excellent or good (combined) was 71% in 2015, down significantly from 79% in 2014 and also lower than the ratings of 74-76% in 2011 to 2013. For comparison, this rating was in the 67-70% range from 2008 to 2010.

Compared to the 2014 scores, excellent ratings declined from 30% to 24%, while fair ratings increased from 17% to 27%.

CUSTOMERS' CONCERNS

**On a scale of 0-to-10 where 0 is not at all concerned and 10 is very concerned, please rate how concerned you are with:
SUFFICIENT WATER SUPPLY?**

Sample Characteristics		Statistics	
		Mean	Median
Total		7.3	8.0
Customer Type	Commercial	7.9	8.0
	Residential	7.1	8.0
Gender	Male	7.1	8.0
	Female	7.4	8.0
Length of Residency	< 5 Years	6.4	8.0
	5 < 10 Years	7.7	8.0
	10 < 20 Years	7.3	8.0
	20+ Years	7.3	8.0
Lot Size	Under ¼ Acre	6.8	8.0
	¼ Acre or More	7.7	8.0
Number in Household	1 Person	7.1	8.0
	2 People	7.3	8.0
	3+ People	6.9	8.0

On the 0-to-10 scale, the mean level of **concern about a sufficient water supply** was 7.3 in 2015. This was the highest level of concern for a sufficient water supply over the past 8 years and up significantly – by a full point – from 6.3 last year in 2014. Concern about a sufficient water supply was relatively low, 5.8 to 5.9, in 2012 and 2013. For comparison, this score was in the 6.5 to 7.2 range from 2008 to 2011.

In 2015, commercial respondents were more concerned about having a sufficient water supply than were residential respondents.

Additionally, respondents with larger lot sizes were more concerned about having a sufficient water supply than were those with smaller lots.

On a scale of 0-to-10 where 0 is not at all concerned and 10 is very concerned, please rate how concerned you are with: **DROUGHTS?**

Sample Characteristics		Statistics	
		Mean	Median
Total		8.1	9.0
Customer Type	Commercial	8.3	9.0
	Residential	8.0	9.0
Gender	Male	7.8	9.0
	Female	8.3	9.0
Length of Residency	< 5 Years	7.5	8.0
	5 < 10 Years	8.2	8.0
	10 < 20 Years	8.1	9.0
	20+ Years	8.3	9.0
Lot Size	Under ¼ Acre	7.7	8.0
	¼ Acre or More	8.5	9.0
Number in Household	1 Person	7.8	9.0
	2 People	8.2	9.0
	3+ People	7.8	8.0

The mean level of **concern about droughts** in 2015 was 8.1, which is significantly higher than the score of 7.4 in 2014 and represents the highest level of concern about droughts in the past 8 years. Concern about droughts was relatively low, in the 6.4 to 6.8 range, from 2011 to 2013, and was in the 7.0 to 7.6 range from 2008 to 2010.

On average, women were more concerned about droughts than were men.

Respondents with larger lot sizes were more concerned about droughts than were those with smaller lots.

On a scale of 0-to-10 where 0 is not at all concerned and 10 is very concerned, please rate how concerned you are with:
GROWTH IN THE COMMUNITY?

Sample Characteristics		Statistics	
		Mean	Median
Total		6.8	8.0
Customer Type	Commercial	7.5	8.0
	Residential	6.6	7.0
Gender	Male	6.6	7.0
	Female	7.0	8.0
Length of Residency	< 5 Years	6.2	6.0
	5 < 10 Years	6.6	7.0
	10 < 20 Years	6.3	7.0
	20+ Years	7.1	8.0
Lot Size	Under ¼ Acre	6.5	7.0
	¼ Acre or More	6.9	8.0
Number in Household	1 Person	6.7	8.0
	2 People	6.9	8.0
	3+ People	6.2	6.0

In 2015, the mean level of **concern about growth in the community** was at 6.8, which has gradually but significantly increased from 6.5 in 2014, 6.2 in 2013, and 6.1 in 2012.

The 2015 rating for concern about community growth was similar to the level of concern expressed back in 2011 (6.9), but was still under the higher level of concern expressed from 2008 to 2010 (7.4 to 7.8).

Commercial respondents expressed more concern about growth in the community than did residential respondents.

On a scale of 0-to-10 where 0 is not at all concerned and 10 is very concerned, please rate how concerned you are with:
RATE INCREASES?

Sample Characteristics		Statistics	
		Mean	Median
Total		7.1	8.0
Customer Type	Commercial	7.7	8.0
	Residential	6.9	8.0
Gender	Male	7.0	8.0
	Female	7.1	8.0
Length of Residency	< 5 Years	6.2	7.0
	5 < 10 Years	7.2	8.0
	10 < 20 Years	7.4	8.0
	20+ Years	7.0	8.0
Lot Size	Under ¼ Acre	6.9	8.0
	¼ Acre or More	7.1	8.0
Number in Household	1 Person	6.9	8.0
	2 People	7.0	8.0
	3+ People	6.8	7.0

In 2015, **concern about rate increases** had a mean score of 7.1, which decreased significantly from 7.5 in 2014, and was closer to the ratings of 6.8 in 2013 and 7.2 in 2012. For comparison, the ratings were in the 7.4 to 7.7 range from 2008 to 2011.

Commercial respondents were more concerned about rate increases than were residential respondents.

In general, longer-term residents were more concerned about rate increases than were newer residents.

**On a scale of 0-to-10 where 0 is not at all concerned and 10 is very concerned, please rate how concerned you are with:
SECURITY AND SAFETY OF THE WATER SUPPLY?**

Sample Characteristics		Statistics	
		Mean	Median
Total		7.0	8.0
Customer Type	Commercial	7.7	9.0
	Residential	6.9	8.0
Gender	Male	7.1	8.0
	Female	7.0	8.0
Length of Residency	< 5 Years	6.0	6.5
	5 < 10 Years	7.4	8.0
	10 < 20 Years	7.5	8.0
	20+ Years	7.0	8.0
Lot Size	Under ¼ Acre	6.7	8.0
	¼ Acre or More	7.2	8.0
Number in Household	1 Person	6.8	7.5
	2 People	6.9	8.0
	3+ People	6.8	8.0

Concern about the security and safety of the water supply had a mean rating of 7.0 in both 2015 and 2014. This score was in the 6.4 to 7.0 range from 2008 to 2015.

Commercial respondents were more concerned about the security and safety of the water supply than were residential respondents.

In general, longer-term residents were more concerned about the security and safety of the water supply than were newer residents.

COMMUNICATION AND ISSUE AWARENESS

How often do you read the bill insert?

Sample Characteristics		Percent Responding				
		Always	Occasionally	Rarely	Never	Don't Know
Total		34.2%	28.2%	14.4%	20.4%	2.8%
Customer Type	Commercial	30.0%	29.0%	11.0%	28.0%	2.0%
	Residential	35.3%	28.0%	15.3%	18.5%	3.0%
Gender	Male	37.0%	28.2%	16.8%	16.8%	1.3%
	Female	31.7%	28.2%	12.2%	23.7%	4.2%
Length of Residency	< 5 Years	34.0%	25.2%	16.5%	21.4%	2.9%
	5 < 10 Years	30.0%	38.0%	10.0%	20.0%	2.0%
	10 < 20 Years	34.2%	35.4%	15.2%	13.9%	1.3%
	20+ Years	37.6%	23.6%	15.8%	18.8%	4.2%
Lot Size	Under ¼ Acre	36.3%	23.8%	15.2%	20.2%	4.5%
	¼ Acre or More	34.2%	32.2%	15.4%	16.8%	1.3%
Number in Household	1 Person	36.9%	26.2%	7.7%	21.5%	7.7%
	2 People	39.0%	31.5%	15.0%	12.0%	2.5%
	3+ People	29.8%	23.7%	18.3%	26.7%	1.5%

In 2015, three out of five respondents (62%) **read the bill insert** in the water bill either always (34%) or occasionally (28%); the percentage who at least occasionally read the bill has been statistically stable and in the 62% to 68% range over the past four years.

Men were more likely than were women to report that they always read the bill insert.

Do you read the message printed on the front page of your bill?

Sample Characteristics		Percent Responding		
		Yes	No	Don't Know
Total		50.1%	39.1%	10.8%
Customer Type	Commercial	53.5%	37.4%	9.1%
	Residential	49.3%	39.5%	11.3%
Gender	Male	52.7%	36.3%	11.0%
	Female	47.7%	41.6%	10.7%
Length of Residency	< 5 Years	44.7%	44.7%	10.7%
	5 < 10 Years	44.0%	46.0%	10.0%
	10 < 20 Years	59.5%	35.4%	5.1%
	20+ Years	48.5%	36.4%	15.2%
Lot Size	Under ¼ Acre	44.4%	43.5%	12.1%
	¼ Acre or More	55.0%	34.2%	10.7%
Number in Household	1 Person	50.8%	35.4%	13.8%
	2 People	50.0%	36.0%	14.0%
	3+ People	48.1%	46.6%	5.3%

Half (50%) of the respondents indicated that they read the message printed on the front page of their bill in 2015, down significantly from 62% in 2014 and 61% in 2013.

This is the lowest percentage in the past 8 years; between 55% and 64% reported that they read the message printed on the front page of their bill from 2008 to 2014.

Do you currently get most of your information about the quality and safety of your drinking water from local news/media, Truckee Meadows Water Authority, both equally, or neither one?

Sample Characteristics		Percent Responding				
		Local News/Media	TMWA	Both Equally	Neither One	Don't Know
Total		24.6%	19.0%	40.5%	12.8%	3.0%
Customer Type	Commercial	24.2%	20.2%	40.4%	11.1%	4.0%
	Residential	24.8%	18.8%	40.5%	13.3%	2.8%
Gender	Male	27.0%	19.0%	39.2%	13.1%	1.7%
	Female	22.5%	19.1%	41.6%	12.6%	4.2%
Length of Residency	< 5 Years	23.3%	19.4%	38.8%	14.6%	3.9%
	5 < 10 Years	14.0%	22.0%	40.0%	22.0%	2.0%
	10 < 20 Years	32.9%	17.7%	34.2%	10.1%	5.1%
	20+ Years	25.5%	17.6%	44.2%	11.5%	1.2%
Lot Size	Under ¼ Acre	27.8%	19.3%	37.7%	13.5%	1.8%
	¼ Acre or More	20.8%	18.8%	45.0%	12.1%	3.4%
Number in Household	1 Person	13.8%	15.4%	41.5%	23.1%	6.2%
	2 People	27.0%	23.0%	39.0%	9.5%	1.5%
	3+ People	27.5%	13.7%	42.0%	13.7%	3.1%

In 2015, 25% reported that their **primary source for information about the quality and safety of their drinking water** was the local news/media, 19% said their primary source was TMWA, and another 41% reported that they get information from both sources equally, while 13% said that neither TMWA nor the local news/media was their primary source.

The percentage who reported that they get their information from both the local news/media and TMWA increased to 41% in 2015, up significantly from 35% in 2014, 27% in 2013, and 24% in 2012.

Respondents with two or more people in their household were more likely than were those who live alone to get most of their information about drinking water from the local news/media.

Where would you prefer to get most of your information about the quality and safety of your drinking water?

Sample Characteristics		Percent Responding				
		Local News/Media	TMWA	Both Equally	Neither One	Don't Know
Total		17.1%	31.7%	46.2%	3.8%	1.2%
Customer Type	Commercial	17.2%	25.3%	52.5%	3.0%	2.0%
	Residential	17.1%	33.2%	44.6%	4.0%	1.0%
Gender	Male	20.0%	34.5%	40.0%	5.1%	0.4%
	Female	14.6%	29.1%	51.7%	2.7%	1.9%
Length of Residency	< 5 Years	21.4%	37.9%	38.8%	1.9%	0.0%
	5 < 10 Years	14.6%	41.7%	29.2%	12.5%	2.1%
	10 < 20 Years	15.2%	31.6%	49.4%	2.5%	1.3%
	20+ Years	16.5%	28.7%	50.0%	3.7%	1.2%
Lot Size	Under ¼ Acre	18.4%	31.8%	45.7%	3.1%	0.9%
	¼ Acre or More	13.6%	34.0%	45.6%	6.1%	0.7%
Number in Household	1 Person	12.7%	39.7%	39.7%	6.3%	1.6%
	2 People	17.1%	33.2%	46.2%	3.0%	0.5%
	3+ People	19.8%	30.5%	44.3%	3.8%	1.5%

When asked **what source they would prefer to get most of their information** about the quality and safety of drinking water from, 17% said the local news/media, 32% indicated TMWA, 46% said both equally, and 4% said neither one.

In 2015, there was a 13-point gap between the percentage who would prefer to get most of their information about drinking water from TMWA (32%) and those who did get most of this information from TMWA (19%), as shown on the previous page. For comparison, the gap between these two measures was 9-points in 2014, 16-points in 2013, 12-points in 2012, and 11-points in 2011. In other words, consistently more people would prefer to get most of their information about drinking water directly from TMWA than actually do.

In 2015, women were more likely than were men to report that they would prefer to get information about drinking water from both the local news/media and TMWA.

Prior to this survey, were you aware of Assigned Day watering?

Sample Characteristics		Percent Responding	
		Yes	No
Total		92.4%	7.6%
Customer Type	Commercial	90.0%	10.0%
	Residential	93.0%	7.0%
Gender	Male	92.9%	7.1%
	Female	92.0%	8.0%
Length of Residency	< 5 Years	91.3%	8.7%
	5 < 10 Years	96.0%	4.0%
	10 < 20 Years	91.1%	8.9%
	20+ Years	94.5%	5.5%
Lot Size	Under ¼ Acre	92.8%	7.2%
	¼ Acre or More	94.6%	5.4%
Number in Household	1 Person	90.8%	9.2%
	2 People	95.0%	5.0%
	3+ People	90.8%	9.2%

In 2015, almost all respondents (92%) were **aware of Assigned Day watering**. This percentage has consistently been in the 92-96% range from 2008 to the present.

At least 90% of all demographic sub-groups studied indicated that they were aware of Assigned Day watering.

Do you have a lawn that you water?

[New question in 2014]

Sample Characteristics		Percent Responding	
		Yes	No
Total		70.2%	29.8%
Customer Type	Commercial	57.0%	43.0%
	Residential	73.5%	26.5%
Gender	Male	71.8%	28.2%
	Female	68.7%	31.3%
Length of Residency	< 5 Years	71.8%	28.2%
	5 < 10 Years	70.0%	30.0%
	10 < 20 Years	68.4%	31.6%
	20+ Years	78.2%	21.8%
Lot Size	Under ¼ Acre	70.0%	30.0%
	¼ Acre or More	79.2%	20.8%
Number in Household	1 Person	53.8%	46.2%
	2 People	74.5%	25.5%
	3+ People	82.4%	17.6%

Seven out of ten respondents (70%) reported that they have **a lawn that they water**, similar to 73% last year, which was the first year that this question was on the survey.

Residential respondents were more likely to have a lawn that they water than were commercial respondents.

In general, respondents who have larger lot sizes and/or more people in the household were more likely to have a lawn that they water.

[If they are aware of Assigned Day watering and have a lawn that they water...] **How many days a week can you water your lawn?**

Sample Characteristics		Percent Responding*						Don't Know
		1 Day	2 Days	3 Days	4 Days	5 Days	7 Days	
Total		1.8%	19.7%	72.5%	0.9%	0.6%	0.6%	3.9%
Customer Type	Commercial	0.0%	28.8%	57.7%	0.0%	0.0%	0.0%	13.5%
	Residential	2.1%	18.0%	75.3%	1.1%	0.7%	0.7%	2.1%
Gender	Male	1.8%	15.2%	78.2%	1.2%	1.2%	1.2%	1.2%
	Female	1.8%	24.1%	67.1%	0.6%	0.0%	0.0%	6.5%
Length of Residency	< 5 Years	1.4%	23.9%	70.4%	1.4%	1.4%	0.0%	1.4%
	5 < 10 Years	0.0%	17.1%	68.6%	5.7%	0.0%	2.9%	5.7%
	10 < 20 Years	3.9%	17.6%	76.5%	0.0%	0.0%	0.0%	2.0%
	20+ Years	2.4%	15.3%	79.0%	0.0%	0.8%	0.8%	1.6%
Lot Size	Under ¼ Acre	3.3%	21.7%	70.4%	0.7%	1.3%	0.7%	2.0%
	¼ Acre or More	0.9%	12.3%	81.6%	1.8%	0.0%	0.9%	2.6%
Number in Household	1 Person	0.0%	18.8%	78.1%	0.0%	0.0%	0.0%	3.1%
	2 People	2.7%	18.4%	74.8%	0.0%	1.4%	1.4%	1.4%
	3+ People	2.0%	17.6%	74.5%	2.9%	0.0%	0.0%	2.9%

*Zero days and six days were allowable response choices but no respondent selected those options.

Respondents who said that they were aware of Assigned Day watering and who also have a lawn were asked a follow-up question regarding **how many days a week they can water their lawn**.

In 2015, 73% indicated that they could water their lawn 3 days a week; this percentage was similar to 75% in 2015, 73% in 2013 and 72% in 2011; the percentage was just 64% in 2012.

Additionally, 20% thought, incorrectly, that they could water only 2 days a week; this is the same percentage (20%) as in 2014, as compared to 16% in 2013, 28% in 2012, and 18% in 2011.

Among those who are aware of Assigned Day watering and who have a lawn, residential respondents were more likely than were commercial respondents to report that they can water their lawn 3 days a week.

Additionally, men were more likely than were women to report that they can water their lawn 3 days a week.

Within seasons, do you typically modify your sprinkler usage based on the actual weather?

[New question in 2014]

Sample Characteristics		Percent Responding	
		Yes	No
Total		90.6%	9.4%
Customer Type	Commercial	96.5%	3.5%
	Residential	89.5%	10.5%
Gender	Male	89.5%	10.5%
	Female	91.7%	8.3%
Length of Residency	< 5 Years	91.9%	8.1%
	5 < 10 Years	82.9%	17.1%
	10 < 20 Years	87.0%	13.0%
	20+ Years	90.7%	9.3%
Lot Size	Under ¼ Acre	89.1%	10.9%
	¼ Acre or More	89.0%	11.0%
Number in Household	1 Person	88.6%	11.4%
	2 People	89.9%	10.1%
	3+ People	88.9%	11.1%

In 2015, nine out of ten respondents (91%) reported that they typically **modify their sprinkler usage based on the actual weather**; this is the same percentage as last year (91%), which was the first year that this question was on the survey.

There was no significant relationship between the level of concern about droughts or having a sufficient water supply and whether respondents modified their sprinkler usage based on the actual weather.

Is Truckee Meadows Water Authority a for-profit utility or a not-for-profit utility?

Sample Characteristics		Percent Responding		
		For-Profit Utility	Not-For-Profit Utility	Don't Know
Total		25.8%	23.4%	50.8%
Customer Type	Commercial	28.0%	18.0%	54.0%
	Residential	25.3%	24.8%	50.0%
Gender	Male	25.2%	28.2%	46.6%
	Female	26.3%	19.1%	54.6%
Length of Residency	< 5 Years	16.5%	25.2%	58.3%
	5 < 10 Years	26.0%	16.0%	58.0%
	10 < 20 Years	29.1%	19.0%	51.9%
	20+ Years	27.9%	30.3%	41.8%
Lot Size	Under ¼ Acre	24.2%	23.8%	52.0%
	¼ Acre or More	27.5%	27.5%	45.0%
Number in Household	1 Person	23.1%	23.1%	53.8%
	2 People	26.5%	26.0%	47.5%
	3+ People	24.4%	24.4%	51.1%

In 2015, 24% reported, correctly, that TMWA is a not-for-profit utility, while 26% reported that TMWA was a for-profit utility, and half (51%) said that they did not know.

The percentage who reported that TMWA was for-profit was 24% in 2015, down significantly from 35% in 2014 and closer to 27% in 2013. For comparison, this figure was 30% in 2012, 40% in 2011, 39% in 2010, 35% in 2009, and 36% in 2008.

At the same time, the percentage who reported that TMWA was not-for-profit was 24% in 2015, similar to 21% in 2014, 27% in 2013, 26% in 2012, 25% in 2011, 24% in 2010, 31% in 2009, and 24% in 2008.

In 2015, 51% of respondents reported that they did not know the profit status, up from 44-46% in 2012 to 2014 and from 34-36% in 2009 to 2011.

In 2015, men were more likely than were women to report that TMWA is a not-for-profit utility, while women were more likely than were men to report that they did not know.

In general, newer residents were more likely to be unsure if TMWA is a for-profit or not-for-profit utility.

Overall, 55% of respondents who perceived that TMWA is a not-for-profit utility were totally satisfied as TMWA customers, compared to 44% of those who perceived that TMWA is a for-profit utility.

Who provides oversight for Truckee Meadows Water Authority? (Unaided)

Sample Characteristics		Percent Responding*							
		Privately Owned, Private Oversight	NV Energy	Washoe County	City of Reno	Jointly by Washoe Co., Cities of Reno and Sparks	Local Citizens	Other	Don't Know
Total		1.2%	2.0%	4.4%	1.6%	4.2%	0.8%	12.2%	73.6%
Customer Type	Commercial	2.0%	1.0%	4.0%	1.0%	5.0%	1.0%	11.0%	75.0%
	Residential	1.0%	2.3%	4.5%	1.8%	4.0%	0.8%	12.5%	73.3%
Gender	Male	1.7%	2.1%	5.9%	1.7%	5.9%	0.8%	16.4%	65.5%
	Female	0.8%	1.9%	3.1%	1.5%	2.7%	0.8%	8.4%	80.9%
Length of Residency	< 5 Years	0.0%	1.0%	1.9%	1.0%	1.9%	1.0%	7.8%	85.4%
	5 < 10 Years	2.0%	0.0%	4.0%	2.0%	2.0%	0.0%	10.0%	80.0%
	10 < 20 Years	1.3%	3.8%	2.5%	2.5%	2.5%	1.3%	10.1%	75.9%
	20+ Years	1.2%	3.0%	6.7%	1.8%	6.7%	0.6%	17.6%	62.4%
Lot Size	Under ¼ Acre	1.3%	2.2%	4.5%	1.8%	4.0%	0.0%	13.0%	73.1%
	¼ Acre or More	0.0%	2.0%	4.7%	2.0%	4.7%	2.0%	12.8%	71.8%
Number in Household	1 Person	1.5%	1.5%	3.1%	3.1%	4.6%	0.0%	13.8%	72.3%
	2 People	1.0%	2.5%	4.5%	1.5%	5.0%	1.5%	14.0%	70.0%
	3+ People	0.8%	2.3%	4.6%	1.5%	1.5%	0.0%	9.9%	79.4%

*City of Sparks was an allowable response but no respondent selected that option.

Only 4% of respondents correctly identified, unaided, that Washoe County, the City of Reno, and the City of Sparks **provide oversight** to Truckee Meadows Water Authority. This percentage has consistently been in the 1% to 7% range from 2008 to 2015.

Three out of four respondents (74%) reported that they did not know who provides oversight to the water company, up significantly from 64% in 2014, although the range of “do not know” responses was in the 70-75% range from 2011 to 2013 and was in the 65-67% range from 2008 to 2010.

In 2015, women were more likely than were men to report that they do not know who provides oversight for TMWA.

[If “don’t know” who provides oversight, probe...] Which of the following five options do you think best describes the entity that provides oversight for Truckee Meadows Water Authority?

Sample Characteristics		Percent Responding					
		Private Citizens	NV Energy	Public Utilities Commission of Nevada	Privately Owned Corporation	Elected Officials from Washoe Co., Cities of Reno & Sparks	Don't Know
Total		6.0%	4.6%	35.9%	2.4%	16.8%	34.2%
Customer Type	Commercial	0.0%	4.0%	26.7%	4.0%	18.7%	46.7%
	Residential	7.5%	4.8%	38.2%	2.0%	16.4%	31.1%
Gender	Male	5.8%	5.8%	37.2%	2.6%	17.9%	30.8%
	Female	6.1%	3.8%	34.9%	2.4%	16.0%	36.8%
Length of Residency	< 5 Years	11.4%	2.3%	35.2%	3.4%	18.2%	29.5%
	5 < 10 Years	5.0%	5.0%	37.5%	2.5%	20.0%	30.0%
	10 < 20 Years	3.3%	8.3%	33.3%	3.3%	15.0%	36.7%
	20+ Years	7.8%	4.9%	43.7%	0.0%	13.6%	30.1%
Lot Size	Under ¼ Acre	8.0%	5.5%	35.6%	3.1%	17.2%	30.7%
	¼ Acre or More	6.5%	3.7%	46.7%	0.9%	13.1%	29.0%
Number in Household	1 Person	10.6%	4.3%	29.8%	0.0%	19.1%	36.2%
	2 People	10.0%	4.3%	40.0%	0.7%	15.0%	30.0%
	3+ People	2.9%	5.8%	39.4%	4.8%	16.3%	30.8%

In 2015, the 74% of respondents who reported that they did not know which entity provides oversight to TMWA were given **five options for aided awareness**. Of the five options, the top choice in 2014 continued to be the Public Utilities Commission of Nevada, cited by 36% of respondents, and similar to the 38-45% of respondents who provided this response in 2011 to 2014.

In 2015, another 34% reported that, even when given five options, they still did not know which entity provides oversight, which is similar to 29% in 2014, and 32% in both 2013 and 2012.

Just 17% of respondents who initially did not know who provides oversight (or 12% of all respondents) correctly reported, when aided with choices, that elected officials from Washoe County, the City of Reno, and the City of Sparks provide oversight.

Altogether 16% of all respondents (4% unaided and 12% aided) correctly identified the entity that provides oversight, similar to 10% in 2014, 13% in both 2013 and 2012, 11% in 2011, and 15% in 2010.

When aided, residential respondents were more likely than were commercial respondents to report, incorrectly, that the Public Utilities Commission of Nevada provides oversight for TMWA.

ONLINE ACCOUNT INFORMATION

Are you aware you can view information about your TMWA account online?

Sample Characteristics		Percent Responding	
		Yes	No, Don't Know
Total		82.2%	17.8%
Customer Type	Commercial	87.0%	13.0%
	Residential	81.0%	19.0%
Gender	Male	84.0%	16.0%
	Female	80.5%	19.5%
Length of Residency	< 5 Years	82.5%	17.5%
	5 < 10 Years	90.0%	10.0%
	10 < 20 Years	81.0%	19.0%
	20+ Years	78.2%	21.8%
Lot Size	Under ¼ Acre	78.9%	21.1%
	¼ Acre or More	87.2%	12.8%
Number in Household	1 Person	69.2%	30.8%
	2 People	81.0%	19.0%
	3+ People	87.0%	13.0%

In 2015, four out of five respondents (82%) indicated they were **aware they could view information about their TMWA account online**, which has been statistically stable at 79-83% since 2012, but up from the baseline figure of 47% in 2003.

In general, respondents who have larger lot sizes and/or more people in their household were more likely than others to be aware that they can view their TMWA account online.

[If aware of ability to access account online...] **Have you accessed your account information online?**

Sample Characteristics		Percent Responding	
		Yes	No, Don't Know, Refused
Total		42.8%	57.2%
Customer Type	Commercial	35.6%	64.4%
	Residential	44.8%	55.2%
Gender	Male	39.0%	61.0%
	Female	46.4%	53.6%
Length of Residency	< 5 Years	54.1%	45.9%
	5 < 10 Years	46.7%	53.3%
	10 < 20 Years	43.8%	56.3%
	20+ Years	38.8%	61.2%
Lot Size	Under ¼ Acre	46.0%	54.0%
	¼ Acre or More	41.5%	58.5%
Number in Household	1 Person	33.3%	66.7%
	2 People	43.2%	56.8%
	3+ People	51.8%	48.2%

Among respondents who were aware that TMWA account information is available online, 43% reported they had **accessed their account information via the internet**, up significantly from 35% in 2014 and 23-29% from 2008 to 2013.

In 2015, about 35% of **all** respondents accessed their TMWA account information online. This is a significant increase from 28% in 2014 and the highest level of access measured to date. For comparison, the percentages were 22-24% in 2011 to 2013, 14-17% in 2008 to 2010, and had a baseline of just 3% in 2003.

In general, the more people in their household, the more likely respondents were to have accessed their account online.

Using a scale from 0-to-10 where 0 means not at all satisfied and 10 means extremely satisfied, how would you rate your user experience with the online account information system?

Sample Characteristics		Statistics	
		Mean	Median
Total		8.4	9.0
Customer Type	Commercial	8.6	9.0
	Residential	8.4	8.0
Gender	Male	7.8	8.0
	Female	8.9	9.0
Length of Residency	< 5 Years	8.6	8.5
	5 < 10 Years	8.1	8.0
	10 < 20 Years	8.5	8.0
	20+ Years	8.3	9.0
Lot Size	Under ¼ Acre	8.4	8.0
	¼ Acre or More	8.2	8.0
Number in Household	1 Person	9.1	10.0
	2 People	8.5	8.0
	3+ People	8.1	8.0

The 35% of all respondents who had accessed their online TMWA account were asked their satisfaction with the **online account information system**.

In 2015, the mean rating for overall satisfaction with the online account information system was 8.4, which was statistically similar to the mean ratings of 8.7 in 2014 and 8.9 in 2013. (In 2012, the survey had asked about user satisfaction with five specific aspects of the online account information system; the mean ratings for those five items were in the 8.5 to 8.7 range.)

Among those who had accessed their online TMWA account, women provided a higher rating than did men for their satisfaction with the experience.

BUSINESS SECTION – COMMERCIAL CUSTOMERS

How old is the building in which your company is located?

Sample Characteristics	Total
Less than 5 Years Old	1.0%
5 to Less than 10 Years Old	11.3%
10 to Less than 20 Years Old	13.4%
20 Years or Older	74.2%
Total Respondents	100.0%

Three out of four commercial respondents (74%) indicated that the **age of the building** in which their company is located is 20 years or older, which is statistically similar to 71% in 2014. This percentage was in the 54-64% range in 2008 to 2013.

Does your business have landscaping that it maintains or pays to maintain?

Sample Characteristics	Total
Yes	57.6%
No	36.4%
Don't Know	6.1%
Total Respondents	100.0%

In 2015, over half the commercial respondents (58%) reported having **landscaping that they either maintain or pay others to maintain**, which is down significantly from 69% in 2014 and a high of 81% in 2013. For comparison, the percentages were between 59% and 70% from 2008 to 2012.

Are the water service lines to your building equipped with backflow prevention assemblies?

Sample Characteristics		Total
	Yes	93.0%
	No	7.0%
Total Respondents		100.0%

Nearly all commercial respondents (93%) reported that their building was **equipped with backflow prevention assemblies**; this is the same percentage as last year. Additionally, this percentage has consistently been in the 83-93% range from 2008 to 2015.

Prior to this survey, were you aware that backflow assemblies need to be tested on an annual basis?

Sample Characteristics		Total
	Yes	80.3%
	No	19.7%
Total Respondents		100.0%

Four out of five commercial respondents (80%) reported being **aware that backflow assemblies need to be tested annually**, which has been statistically stable, in the 78-86% range, since 2010.

Do you feel Truckee Meadows Water Authority provides adequate information for you to properly maintain your backflow assemblies?

Sample Characteristics		Total
	Yes	78.0%
	No	22.0%
Total Respondents		100.0%

Overall, 78% of commercial respondents felt that **TMWA provided adequate backflow maintenance information**, which has been statistically stable, in the 76-90% range, since 2010.

DEMOGRAPHICS – RESIDENTIAL CUSTOMERS

What is the size of your lot?

Sample Characteristics		Percent Responding				
		Under ¼ Acre	¼ but < ½ Acre	½ but < 1 Acre	1 Acre or More	No Lot or Condo
Total		55.1%	26.3%	9.7%	4.0%	4.8%
Gender	Male	49.2%	28.8%	12.6%	5.2%	4.2%
	Female	61.3%	23.8%	6.6%	2.8%	5.5%
Length of Residency	< 5 Years	67.0%	19.1%	6.4%	5.3%	2.1%
	5 < 10 Years	51.1%	29.8%	19.1%	0.0%	0.0%
	10 < 20 Years	50.0%	29.7%	10.8%	1.4%	8.1%
	20+ Years	51.6%	28.4%	7.7%	5.8%	6.5%
Number in Household	1 Person	49.1%	25.5%	5.5%	1.8%	18.2%
	2 People	54.5%	27.7%	9.9%	4.7%	3.1%
	3+ People	59.3%	24.4%	10.6%	4.1%	1.6%

What percentage of your yard is lawn?

Sample Characteristics		Mean Percent
Total		25.4%
Gender	Male	26.1%
	Female	24.7%
Length of Residency	< 5 Years	20.8%
	5 < 10 Years	26.3%
	10 < 20 Years	24.4%
	20+ Years	28.6%
Lot Size	Under ¼ Acre	23.9%
	¼ Acre or More	27.6%
Number in Household	1 Person	17.6%
	2 People	26.5%
	3+ People	27.8%

How many people live in your household?

Sample Characteristics		Percent Responding				
		1	2	3	4	5 or More
Total		16.4%	50.5%	16.2%	10.9%	6.1%
Gender	Male	12.1%	55.8%	16.6%	8.5%	7.0%
	Female	20.8%	45.2%	15.7%	13.2%	5.1%
Length of Residency	< 5 Years	12.7%	47.1%	23.5%	13.7%	2.9%
	5 < 10 Years	16.3%	42.9%	14.3%	14.3%	12.2%
	10 < 20 Years	15.2%	53.2%	15.2%	10.1%	6.3%
	20+ Years	19.5%	53.0%	12.8%	8.5%	6.1%
Lot Size	Under ¼ Acre	16.7%	49.5%	18.5%	9.9%	5.4%
	¼ Acre or More	12.2%	55.1%	12.9%	12.2%	7.5%

How long have you lived in the area?

Sample Characteristics		Percent Responding					
		< 1 Year	1 < 2 Years	2 < 5 Years	5 < 10 Years	10 < 20 Years	20+ Years
Total		6.3%	8.6%	11.1%	12.6%	19.9%	41.6%
Gender	Male	6.0%	8.5%	10.1%	13.1%	17.1%	45.2%
	Female	6.6%	8.6%	12.1%	12.1%	22.7%	37.9%
Lot Size	Under ¼ Acre	7.2%	9.9%	12.2%	10.8%	19.4%	40.5%
	¼ Acre or More	5.4%	6.1%	8.1%	15.5%	20.9%	43.9%
Number in Household	1 Person	0.0%	6.2%	13.8%	12.3%	18.5%	49.2%
	2 People	6.6%	8.6%	9.1%	10.6%	21.2%	43.9%
	3+ People	9.2%	9.9%	12.2%	15.3%	19.1%	34.4%

Into which of the following groups does your age fall?

Sample Characteristics		Percent Responding							
		Age < 25	Age 25 to 34	Age 35 to 44	Age 45 to 54	55 to 64	65 to 74	75+	Refused
Total		2.3%	13.0%	16.3%	9.8%	21.8%	21.6%	14.0%	1.3%
Gender	Male	2.0%	14.5%	16.5%	9.5%	20.5%	23.5%	12.0%	1.5%
	Female	2.5%	11.6%	16.1%	10.1%	23.1%	19.6%	16.1%	1.0%
Length of Residency	< 5 Years	5.9%	19.6%	20.6%	7.8%	21.6%	18.6%	4.9%	1.0%
	5 < 10 Years	0.0%	26.0%	30.0%	6.0%	14.0%	16.0%	8.0%	0.0%
	10 < 20 Years	2.5%	7.6%	17.7%	12.7%	21.5%	19.0%	16.5%	2.5%
	20+ Years	0.6%	7.3%	9.1%	10.9%	24.2%	26.7%	20.6%	0.6%
Lot Size	Under ¼ Acre	2.7%	12.6%	15.3%	11.7%	21.6%	21.2%	14.4%	0.5%
	¼ Acre or More	1.3%	14.1%	17.4%	8.7%	22.8%	21.5%	13.4%	0.7%
Number in Household	1 Person	0.0%	10.8%	6.2%	4.6%	21.5%	33.8%	23.1%	0.0%
	2 People	1.0%	10.1%	9.0%	6.5%	25.6%	27.6%	18.6%	1.5%
	3+ People	5.3%	18.3%	32.8%	17.6%	16.8%	6.1%	2.3%	0.8%

Most people think of themselves as belonging to a particular ethnic or racial group. Which of the following ethnic categories best describes you?

Sample Characteristics		Percent Responding						
		Caucasian	African-American	Hispanic or Latin	Asian/Pacific Islander	Native American	Other	Refused
Total		81.7%	1.3%	5.0%	3.5%	1.0%	1.5%	6.0%
Gender	Male	81.5%	2.0%	4.0%	2.5%	1.5%	1.0%	7.5%
	Female	81.9%	0.5%	6.0%	4.5%	0.5%	2.0%	4.5%
Length of Residency	< 5 Years	75.5%	2.0%	7.8%	4.9%	2.0%	2.0%	5.9%
	5 < 10 Years	84.0%	0.0%	2.0%	8.0%	0.0%	0.0%	6.0%
	10 < 20 Years	81.0%	1.3%	8.9%	2.5%	0.0%	1.3%	5.1%
	20+ Years	86.1%	1.2%	2.4%	1.8%	1.2%	1.2%	6.1%
Lot Size	Under ¼ Acre	77.9%	1.8%	7.2%	2.7%	1.8%	1.8%	6.8%
	¼ Acre or More	89.3%	0.7%	1.3%	4.0%	0.0%	0.7%	4.0%
Number in Household	1 Person	84.6%	0.0%	4.6%	4.6%	0.0%	0.0%	6.2%
	2 People	83.4%	1.5%	3.0%	1.5%	1.5%	3.0%	6.0%
	3+ People	78.6%	1.5%	8.4%	6.1%	0.8%	0.0%	4.6%

Which category best represents your total annual household income before taxes?

Sample Characteristics		Percent Responding									
		Under \$15,000	\$15,000 - \$24,999	\$25,000 - \$34,999	\$35,000 - \$49,999	\$50,000 - \$74,999	\$75,000 - \$99,999	\$100,000 - \$149,999	\$150,000 or More	Don't Know	Refused
Total		5.3%	6.0%	5.0%	12.5%	16.8%	13.5%	9.8%	6.5%	3.8%	20.8%
Gender	Male	5.0%	3.5%	4.0%	13.0%	21.0%	11.5%	13.5%	7.0%	3.0%	18.5%
	Female	5.5%	8.5%	6.0%	12.1%	12.6%	15.6%	6.0%	6.0%	4.5%	23.1%
Length of Residency	< 5 Years	3.9%	6.9%	4.9%	14.7%	13.7%	16.7%	14.7%	5.9%	5.9%	12.7%
	5 < 10 Years	2.0%	0.0%	4.0%	14.0%	22.0%	14.0%	6.0%	6.0%	4.0%	28.0%
	10 < 20 Years	5.1%	8.9%	5.1%	13.9%	15.2%	13.9%	7.6%	5.1%	3.8%	21.5%
	20+ Years	7.3%	6.1%	5.5%	10.3%	17.6%	10.9%	9.1%	7.9%	2.4%	23.0%
Lot Size	< ¼ Acre	7.2%	6.8%	5.4%	13.5%	16.7%	17.1%	7.7%	5.0%	4.1%	16.7%
	¼ Acre +	3.4%	2.7%	5.4%	12.8%	18.1%	9.4%	14.8%	9.4%	0.7%	23.5%
Number in Household	1 Person	15.4%	18.5%	9.2%	12.3%	15.4%	3.1%	3.1%	1.5%	6.2%	15.4%
	2 People	4.0%	3.0%	4.5%	13.1%	19.1%	13.6%	10.1%	6.0%	3.0%	23.6%
	3+ People	2.3%	3.8%	3.8%	12.2%	14.5%	19.1%	13.0%	9.9%	3.8%	17.6%

What is your zip code?

Sample Characteristics	Total
89509	13.5%
89436	12.2%
89502	10.8%
89431	10.0%
89506	9.5%
89523	9.3%
89503	8.7%
89434	7.1%
89511	4.8%
89519	3.5%
89512	3.1%
89521	1.7%
89433	0.8%
89441	0.8%
89432	0.6%
89501	0.6%
Other	2.9%