



TRUCKEE MEADOWS WATER
AUTHORITY

2016

Customer Satisfaction



Survey Purpose & Methodology

Fiscal Year 2016



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 (15 annual studies to date)

2016 Methodology:

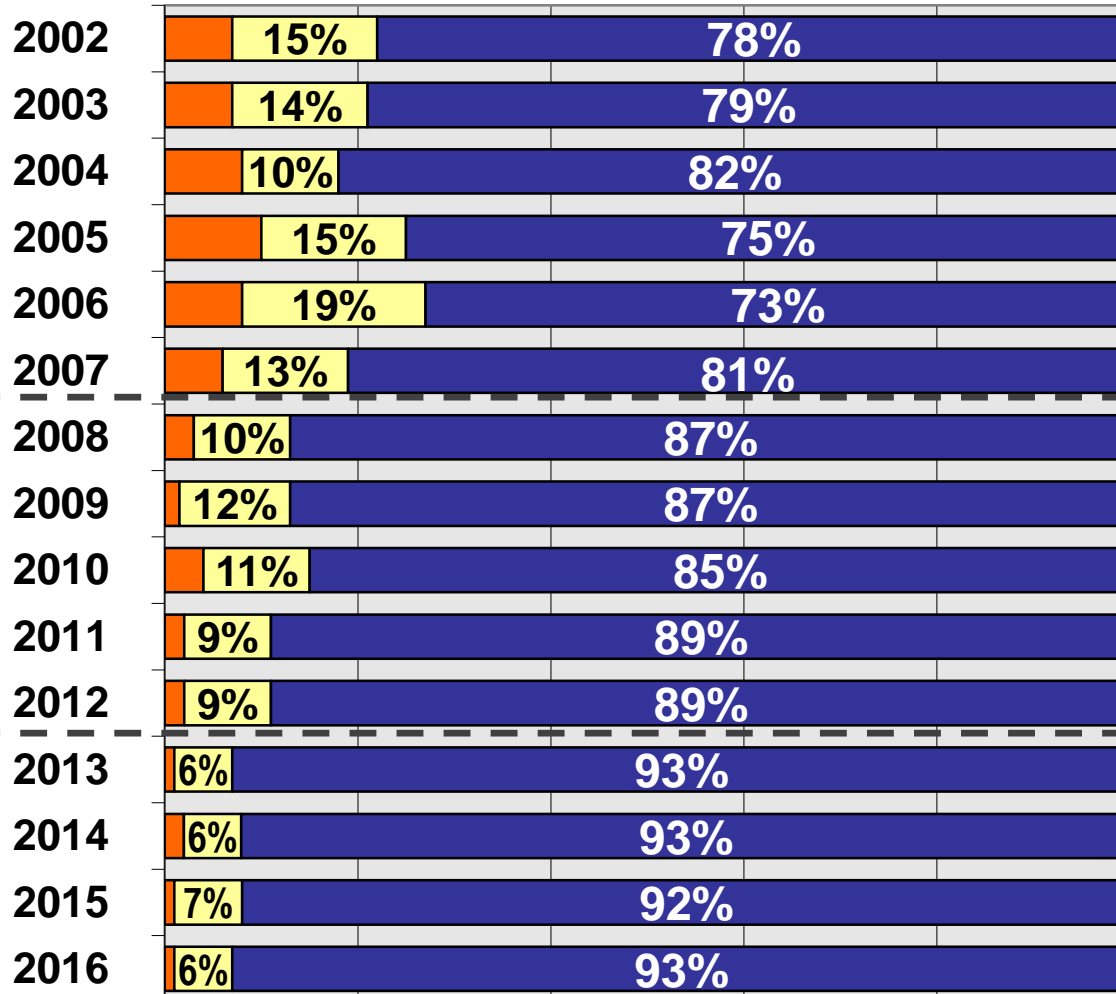
- In the field from July 2015 to June 2016; interviews averaged 7-10 minutes
- Sample of **500**: 400 Residential and 100 Commercial Customers
- Telephone surveys managed by InfoSearch International
- Total sample, at 95% confidence level, $\pm 4.4\%$ confidence interval



Overall Customer Satisfaction

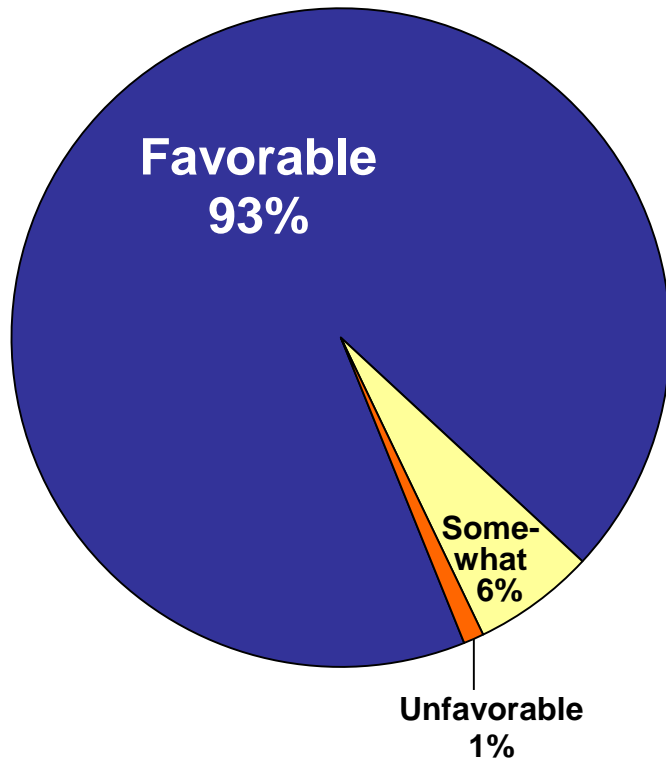
2002 - 2016

■ Unfavorable
 ■ Somewhat
 ■ Favorable



- From 2002 to 2007, overall satisfaction ratings ranged from 73-82% favorable.
- From 2008 to 2012, overall satisfaction ratings ranged from 85-89% favorable.
- For the last four years, overall satisfaction ratings have been in the 92-93% range.

Overall Customer Satisfaction With Example Comments – 2016



- **Favorable (93%)**

- *"I think they are doing an excellent job."*
- *"People there are very efficient."*
- *"I like the way they educated the community."*
- *"You do a wonderful job keeping water safe and clean."*
- *"Happy they finally got everyone on meters."*
- *"The online information is very helpful."*
- *"Keep up the good work."*

- **Somewhat (6%)**

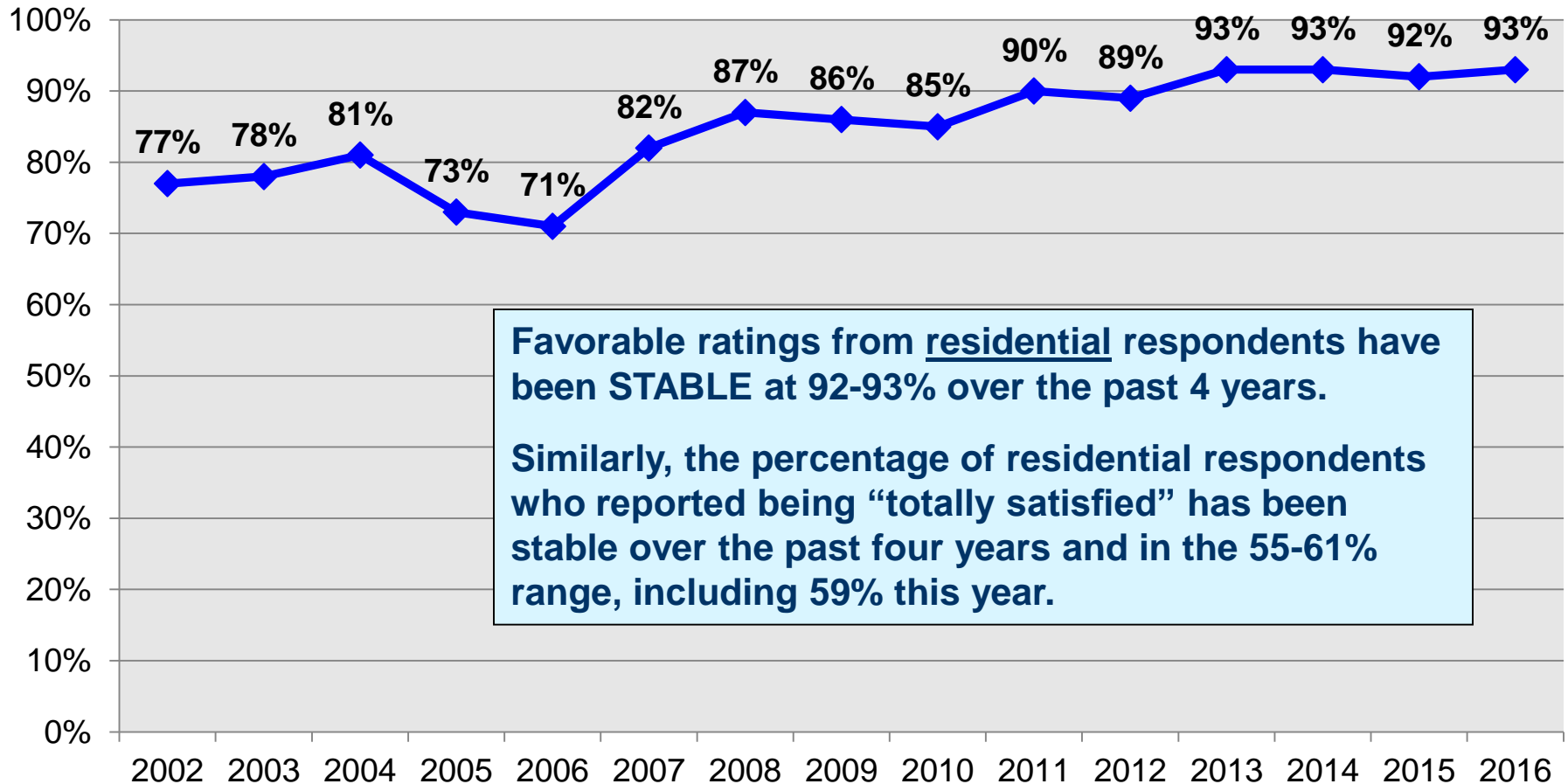
- *"I'd like the water pressure to be increased."*
- *"They should have it so you can pay your bill online."*

- **Unfavorable (1%)**

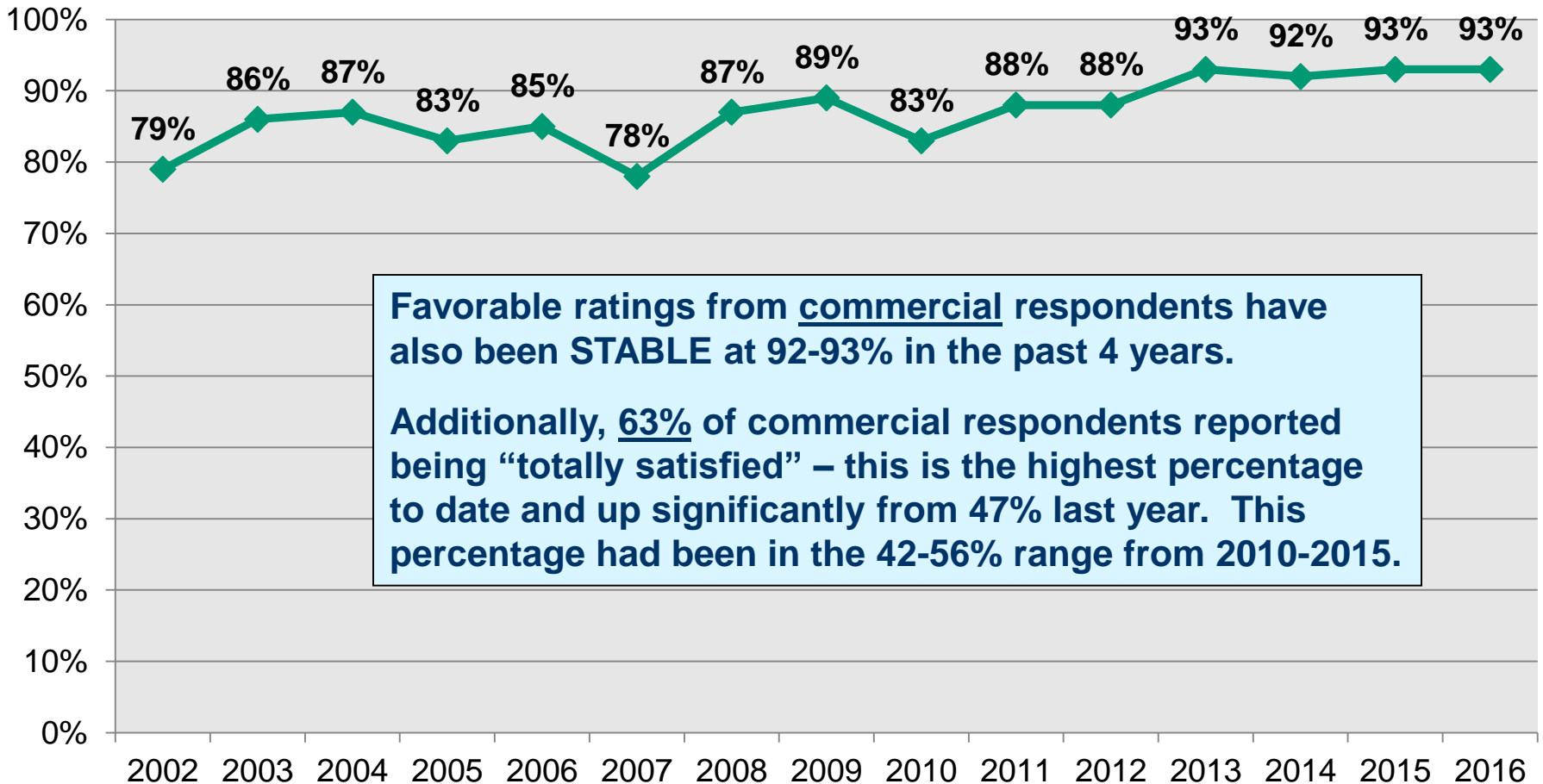
- *"Need to find out why water smells."*
- *"Poor quality, poor service."*

Overall Satisfaction Among Residential Respondents

2002 - 2016



Overall Satisfaction Among Commercial Respondents 2002 - 2016

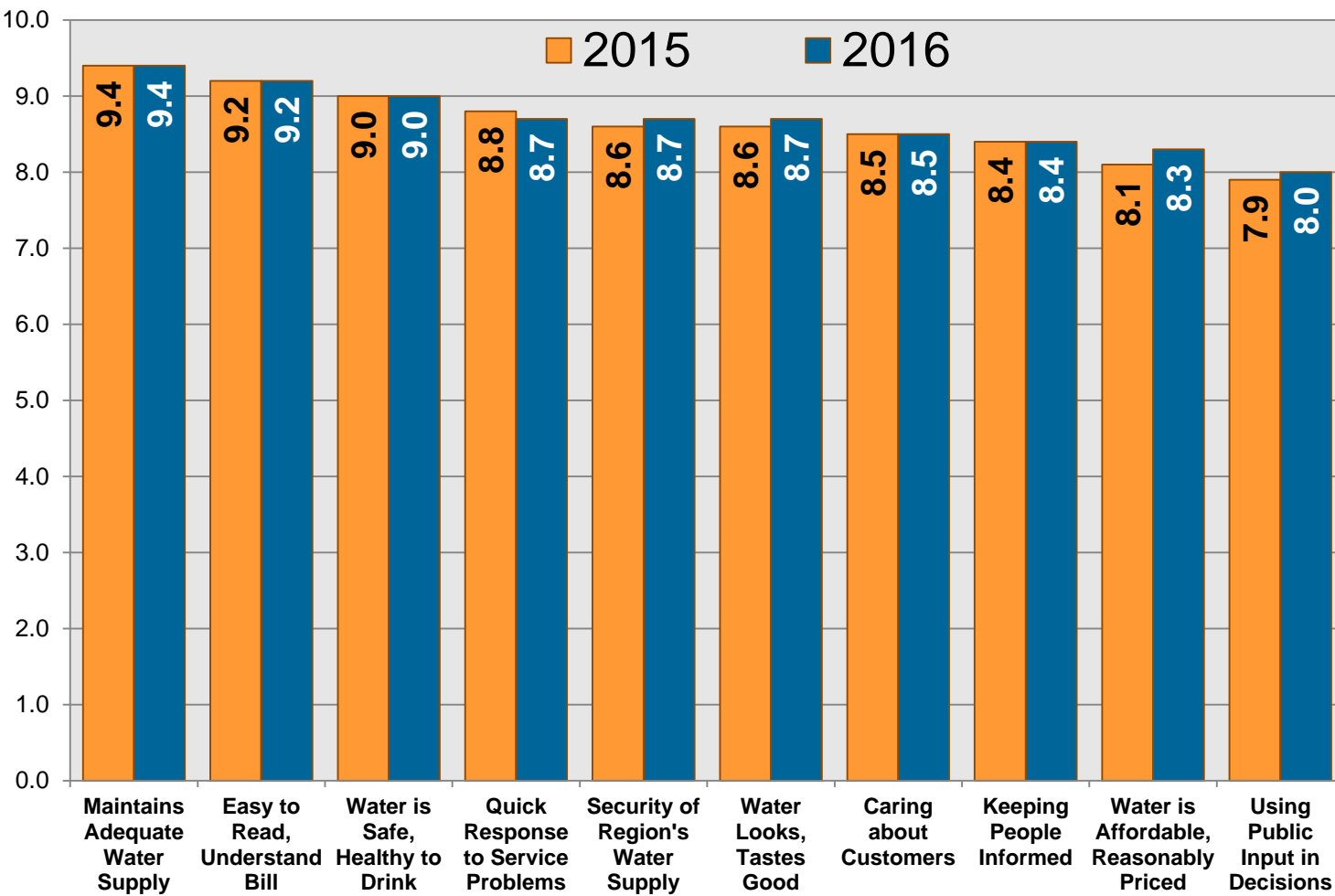


Favorable ratings from commercial respondents have also been **STABLE** at 92-93% in the past 4 years.

Additionally, 63% of commercial respondents reported being “totally satisfied” – this is the highest percentage to date and up significantly from 47% last year. This percentage had been in the 42-56% range from 2010-2015.

TMWA's Performance 2015 - 2016

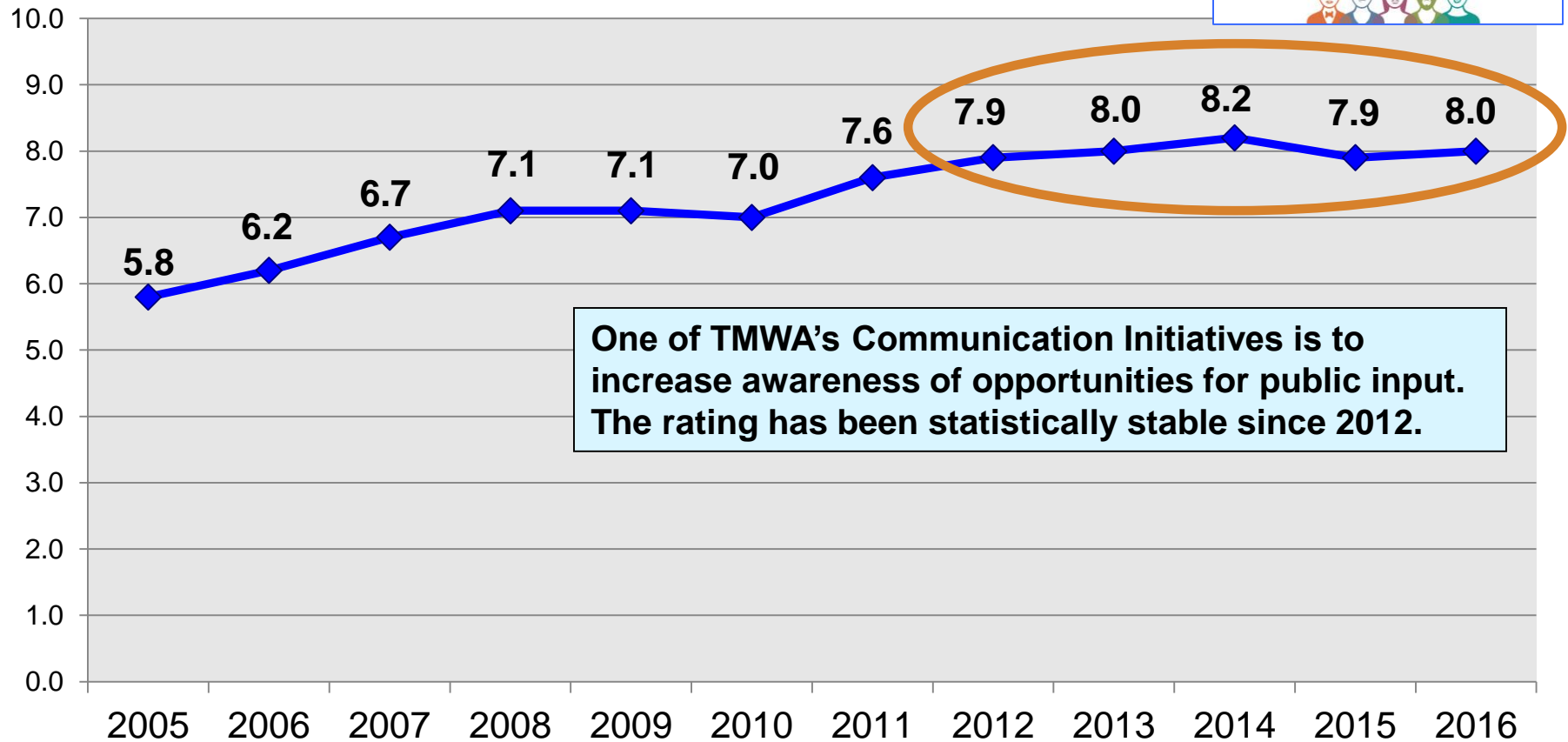
Scale from 0 "Very Poor Job" to 10 "Excellent Job"



In 2016:

- All 10 performance measures had a mean of 8.0 or higher on a 0-to-10 scale.
- The highest rated item was maintaining an adequate water supply (9.4).
- The lowest rated item was using public input in decisions, which had a mean of 8.0.
- None of the 10 ratings changed significantly compared to 2015 (or 2014).
- Residential respondents rated ease of reading and understanding the bill higher (9.3) than did commercial respondents (8.8).

Long-Term Ratings Trend for “Using Public Input in Decision Making” 2005 - 2016



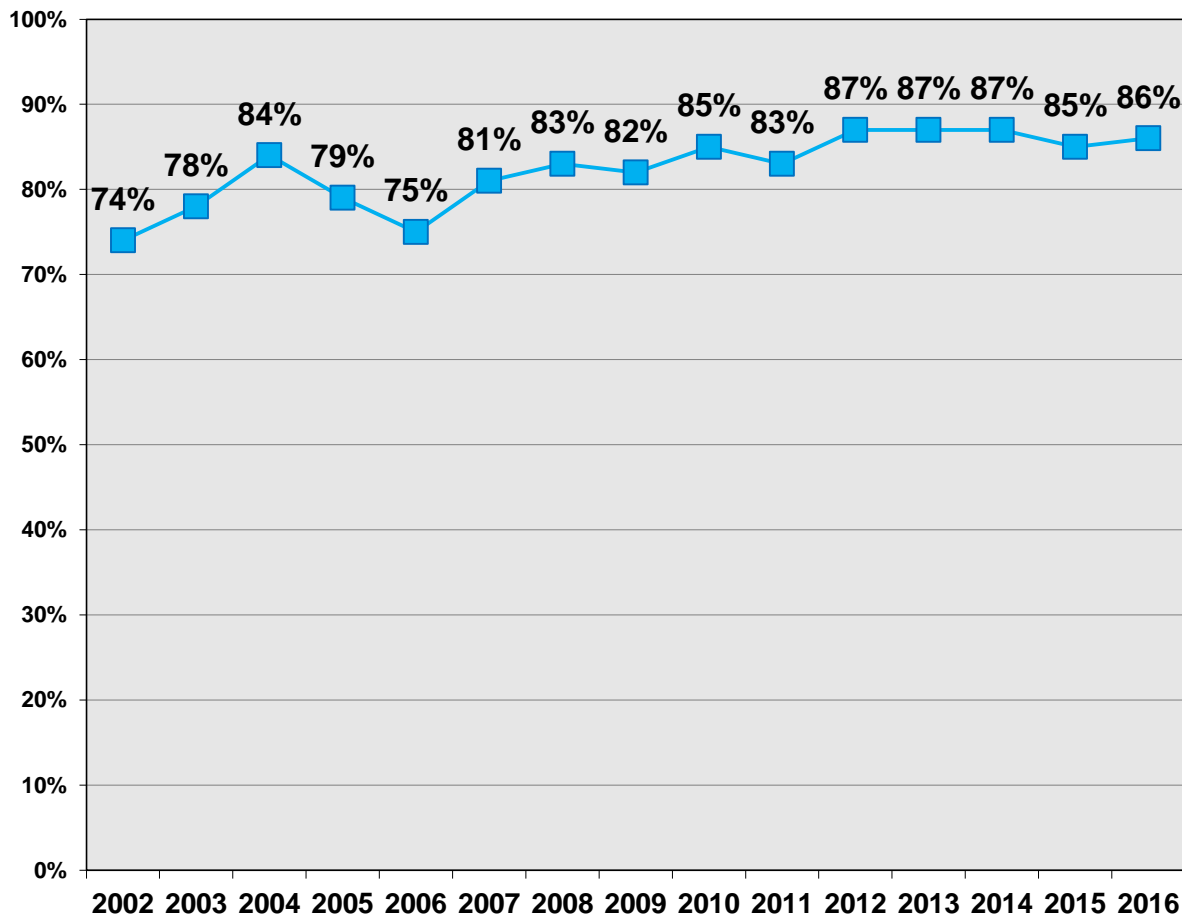
One of TMWA’s Communication Initiatives is to increase awareness of opportunities for public input. The rating has been statistically stable since 2012.

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

Quality of Drinking Water 2002 - 2016



Respondents Who Rated Drinking Water Quality as Either Excellent or Good

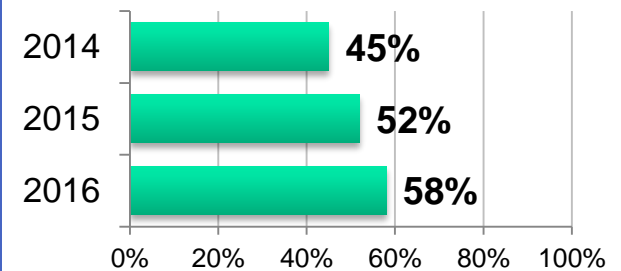


- In 2016, 86% rated the quality of drinking water as excellent or good; this score has been in the 85-87% range for 5 years.

- Nearly all respondents (91%) noted “no difference” in water quality as compared to one year ago; 6% said it was better and 3% said it was worse.

- Over half (57%) reported that their tap water was better than that of other cities; only 7% said it was worse.

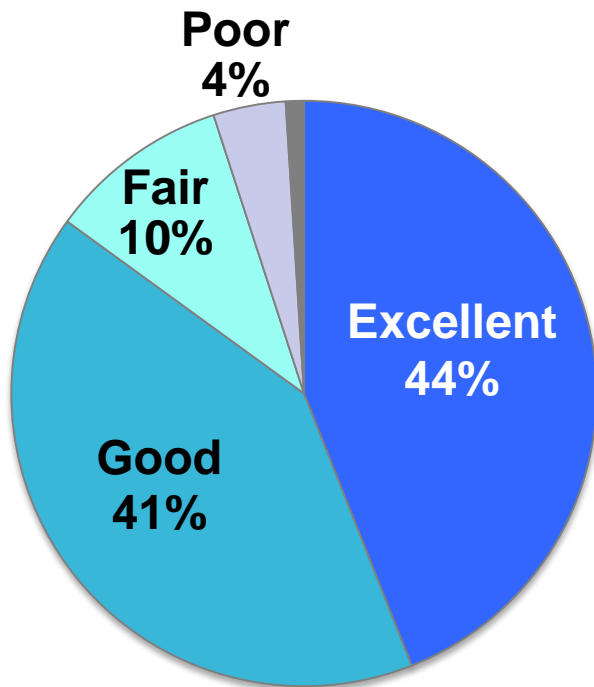
Percentage Who Reported “Never”



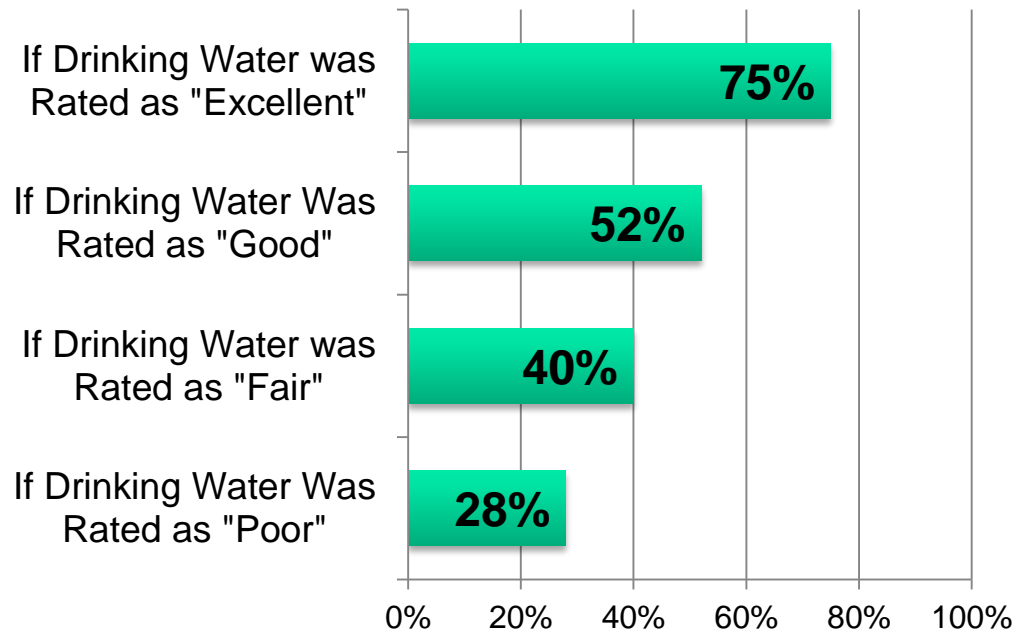
Relationship Between Water Quality and Overall Satisfaction – 2016



Ratings for Drinking Water Quality

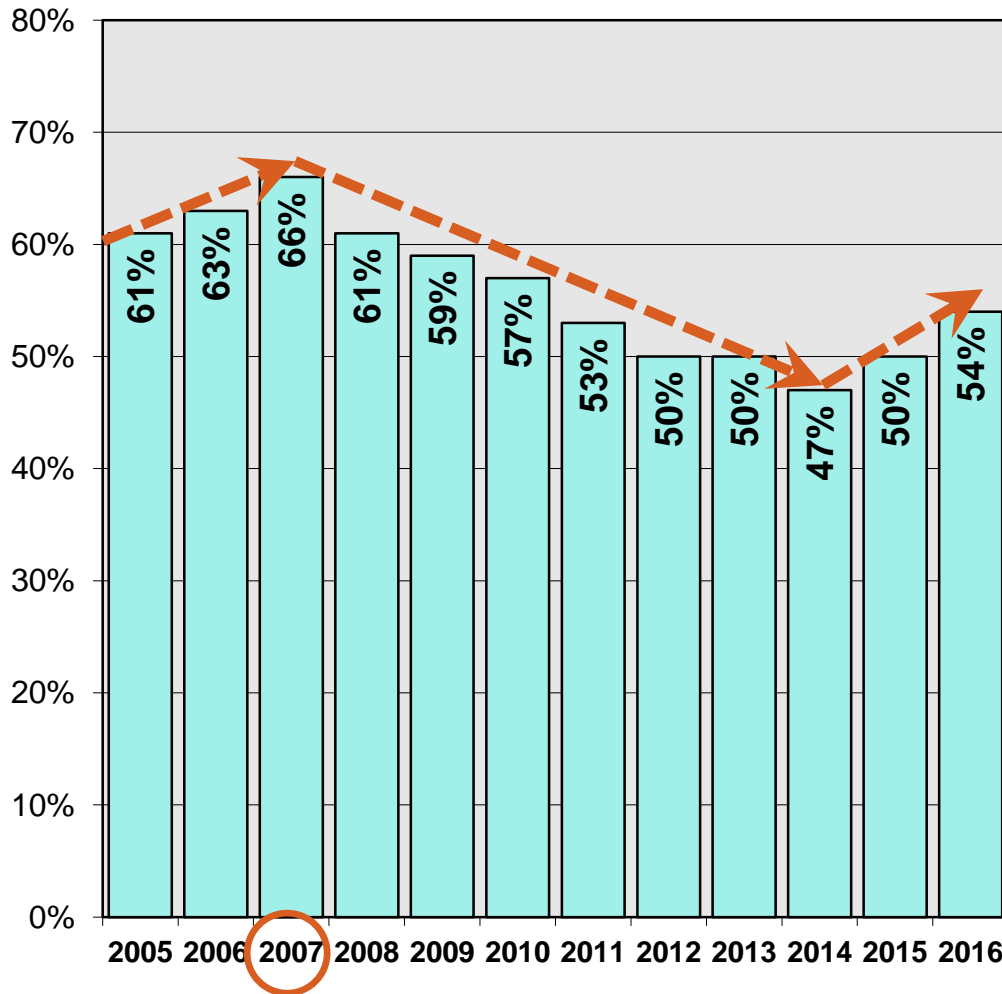


Percentage Who Were “Totally Satisfied” with TMWA ... Based on Their Rating for Drinking Water Quality



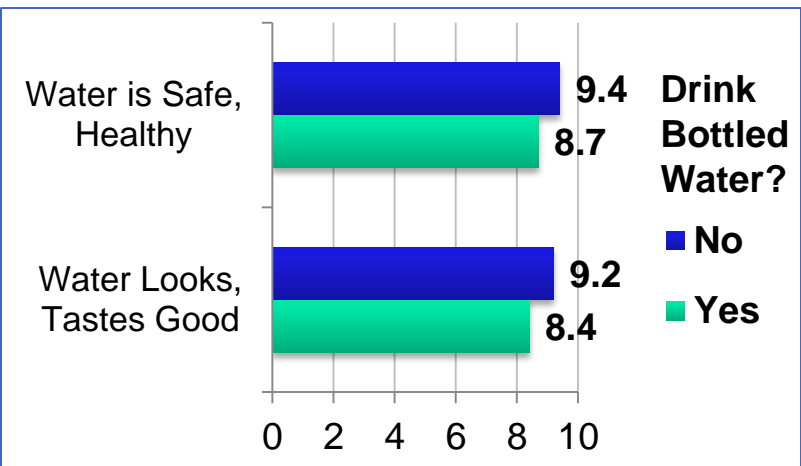
Use of Bottled Water

2005 - 2016



- TMWA customers' use of bottled water steadily declined from a high of 66% in 2007 to a low of 47% in 2014; however, use has rebounded up to 54% in 2016.

- While the main reason for drinking bottled water continued to be convenience (51%), respondents who drank bottled water provided lower ratings for water quality than did those who did not drink bottled water.

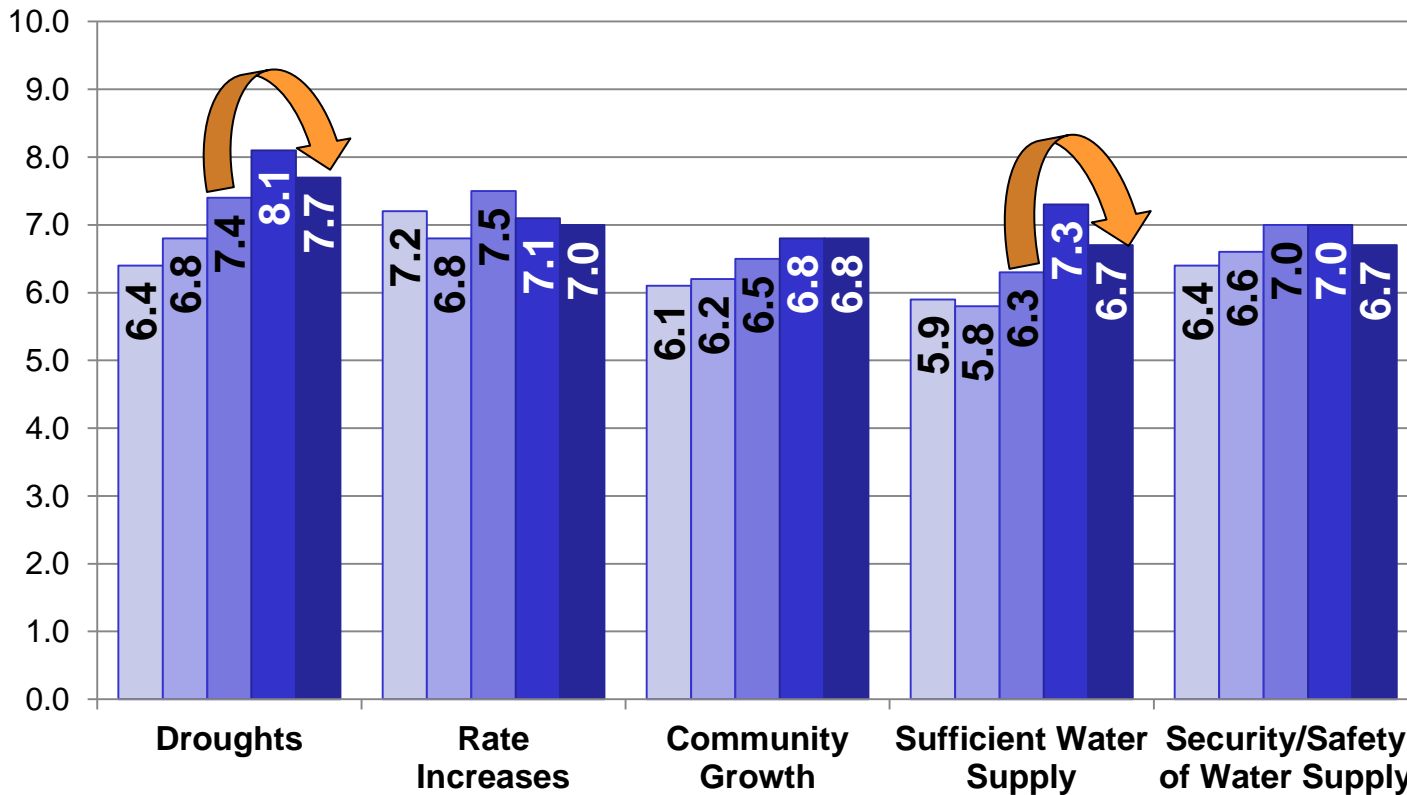


Potential Concerns – 2012 - 2016

Scale from 0 “Not at All Concerned” to 10 “Very Concerned”

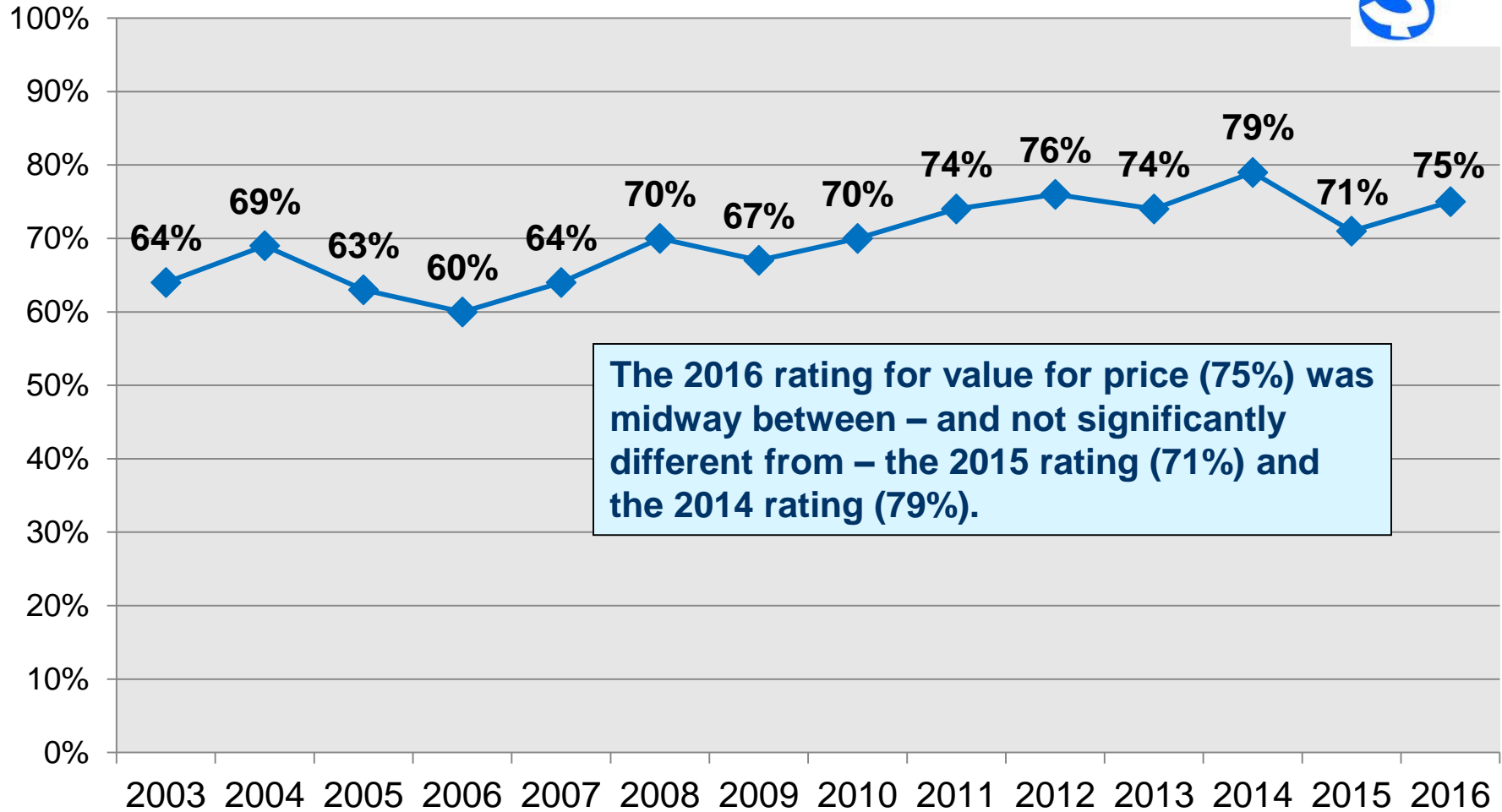


2012 2013 2014 2015 2016



- Of the five issues measured, respondents were most concerned about droughts (mean = 7.7) in 2016.
- Concern levels about droughts and a sufficient water supply decreased significantly from 2015 to 2016, but remained higher than in 2012-2014.

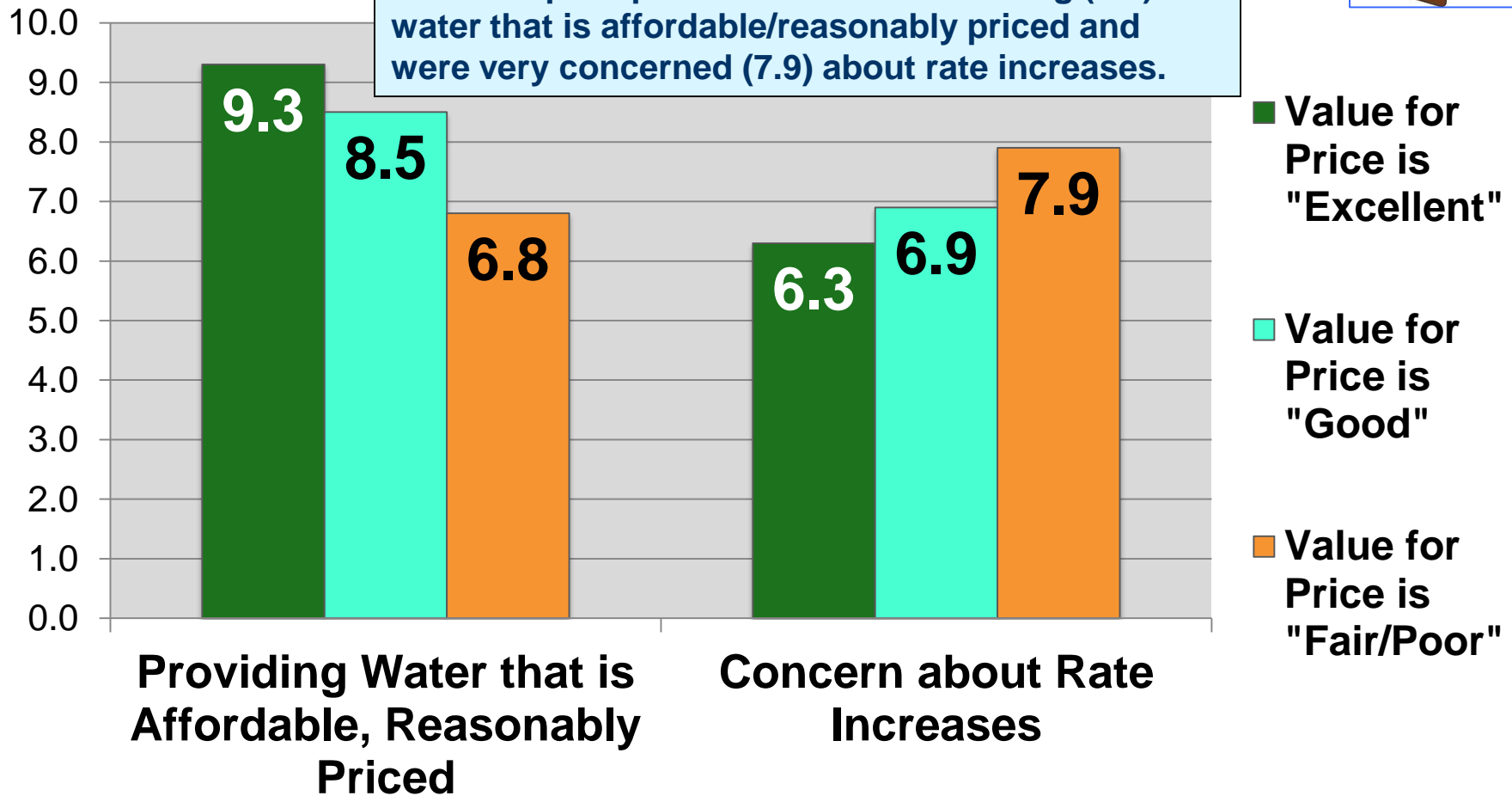
Price Relative to Value of Quality/Service Excellent or Good Ratings – 2003-2016



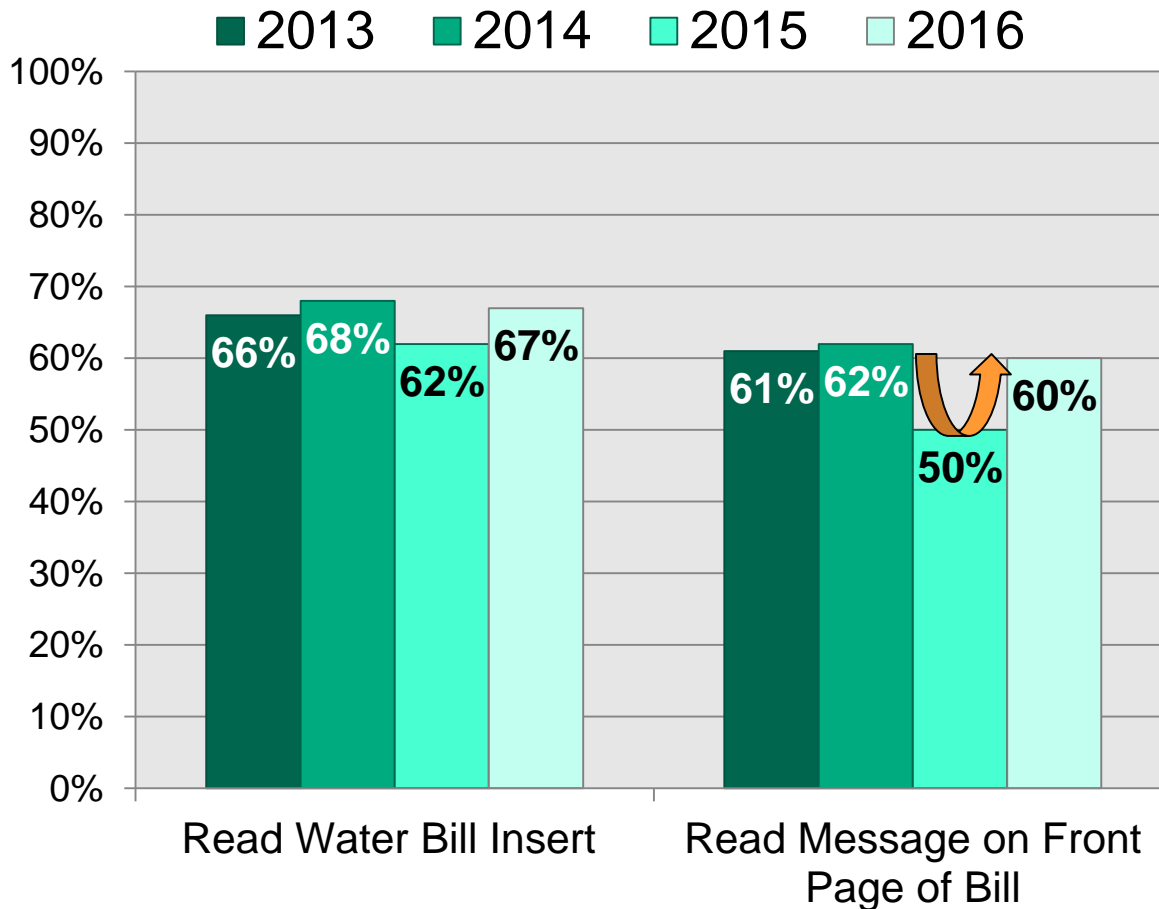
Relationships between Value for Price and Mean Ratings – 2016



The 26% of respondents who rated value for price as fair or poor provided a moderate rating (6.8) for water that is affordable/reasonably priced and were very concerned (7.9) about rate increases.



Attention to Written Messages in Water Bill – 2013 - 2016



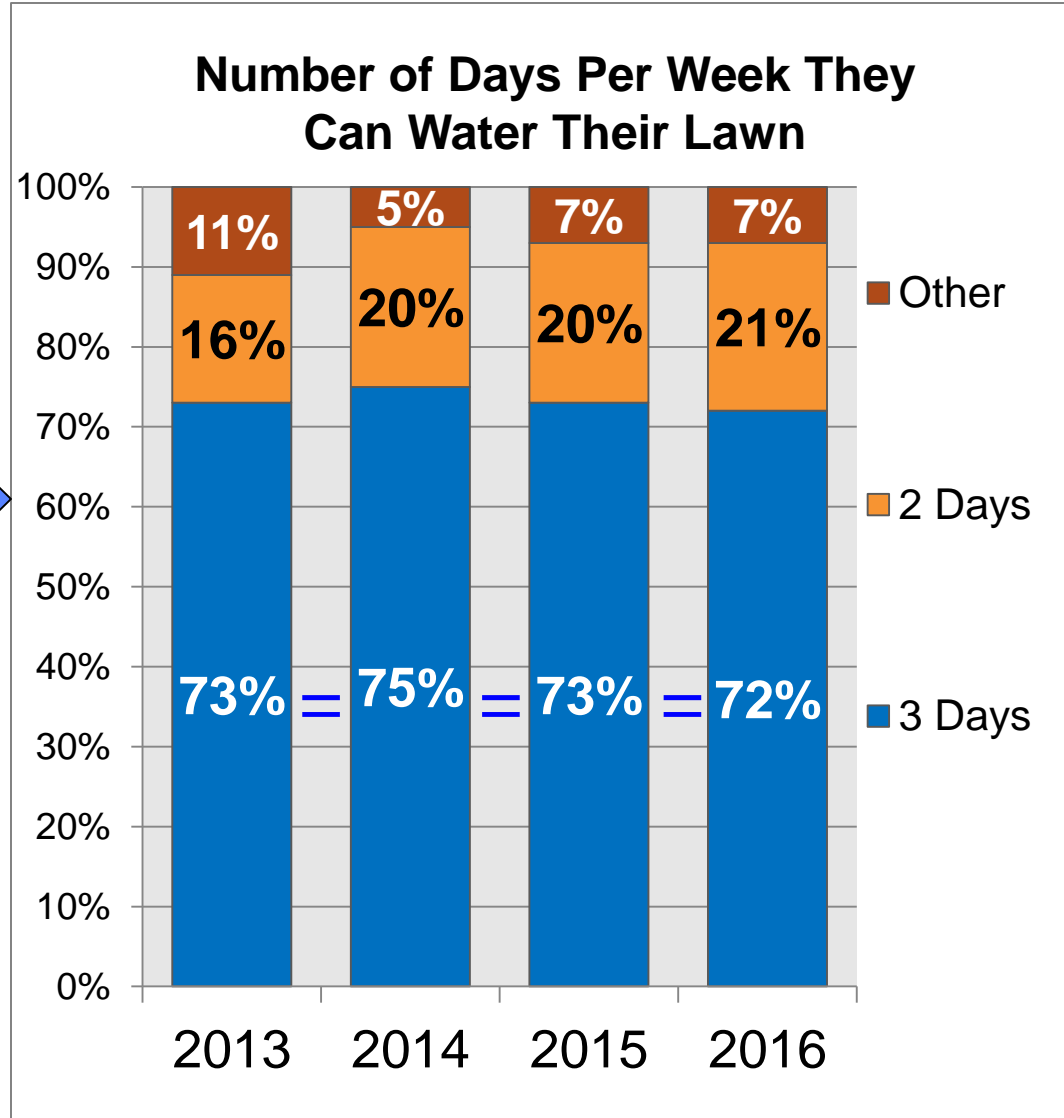
- Slightly more people read the water bill insert than read the message on the front page of the bill.
 - The percentage who read the bill insert has been consistently in the 62-72% range from 2008 to 2016.
 - The percentage who read the front page message was lower than average in 2015 (50%) but rebounded up to 60% in 2016.
- Overall, in 2016:
- 18% read only the insert
 - 11% read only the front page
 - 49% read both
 - 22% read neither



Assigned Day Watering Awareness

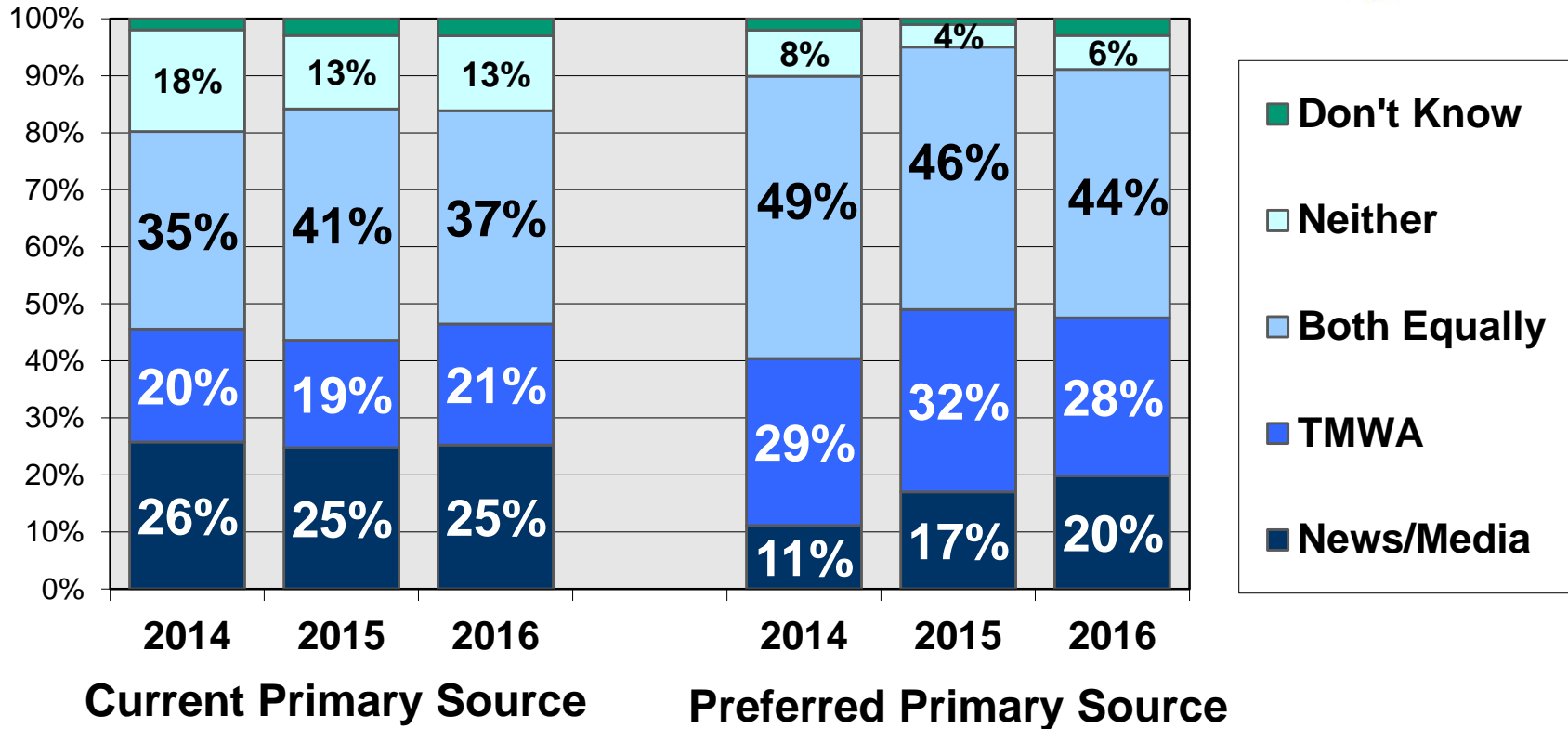
2013 - 2016

- Over the past 9 years, at least 9 out of 10 respondents have been aware of Assigned Day Watering, including 91% in 2016.
- In 2016, two out of three (68%) had a lawn that they water.
- Among those who were aware of Assigned Day Watering and who had a lawn, 72% reported that they can water 3 days a week, similar to 73-75% in the prior three years.
- In 2016, nine out of ten (91%) reported that they modified sprinkler usage based on the weather, the same percentage as in the prior two years.
- Respondents who were unconcerned about droughts and/or rate increases were less likely to modify their sprinkler usage based on the weather.





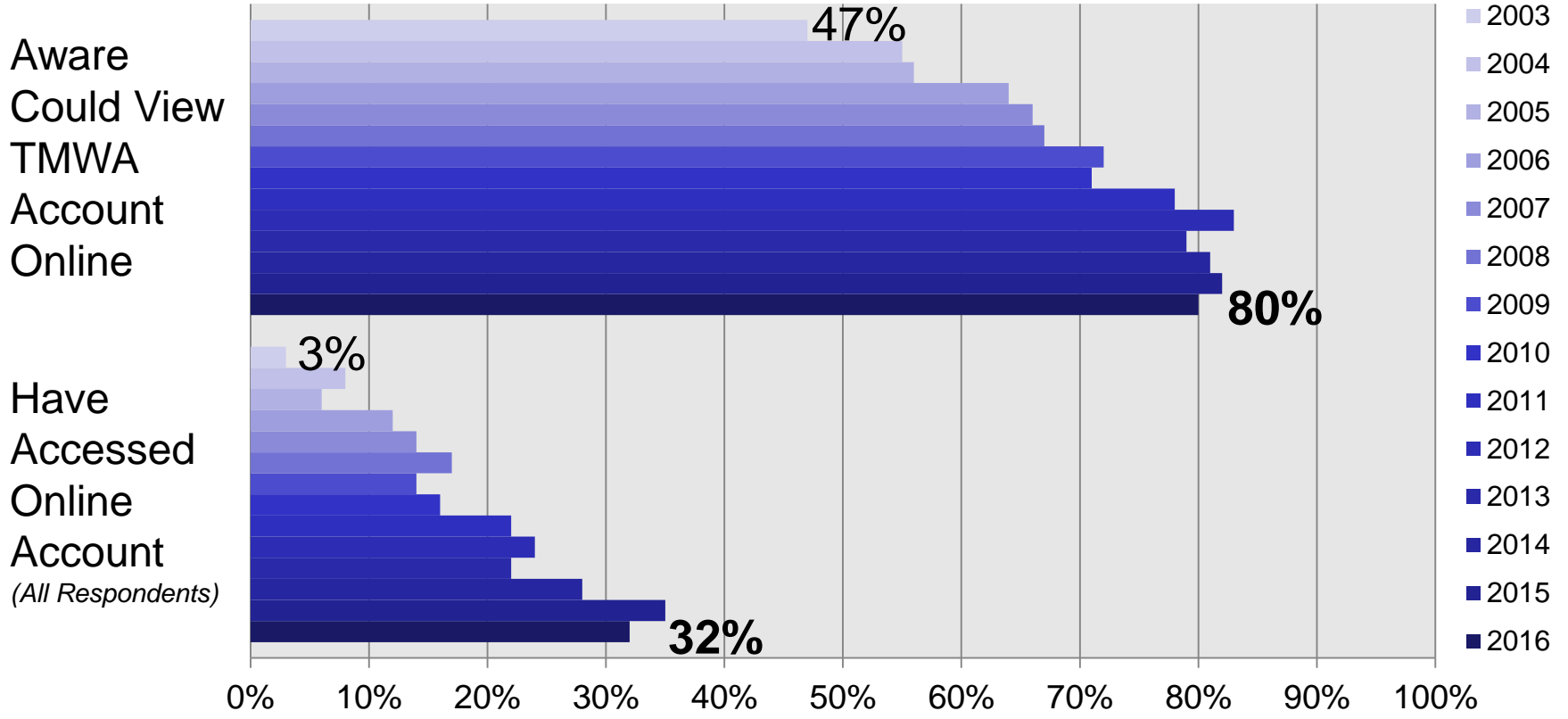
Primary Source of Information About Drinking Water – 2014 - 2016



- In 2016, slightly more respondents received information about drinking water from the local news/media (25%) than from TMWA (21%), although more respondents would prefer to receive this information from TMWA (28%) than the local news/media (20%).
- Over the past three years, nearly half of the respondents (44-49%) reported that they would prefer to receive this information from both the local news/media and TMWA.



TMWA Online Accounts – 2003 - 2016

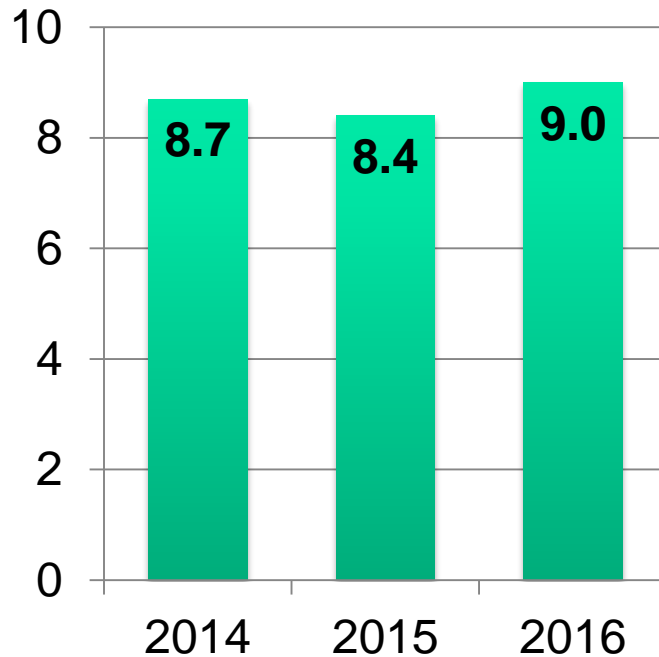


- Over the past 5 years, general awareness of TMWA online accounts has stabilized, with four out of five respondents (78-83%) aware that they can view their account online.
- In 2016, one out of three (32%) had accessed their online account, up from 22% five years ago and 12% ten years ago.

Satisfaction with TMWA's Online Account Information System – 2014 - 2016



Mean Level of Satisfaction with TMWA's Online Account System



Some respondents mentioned issues with paying online:

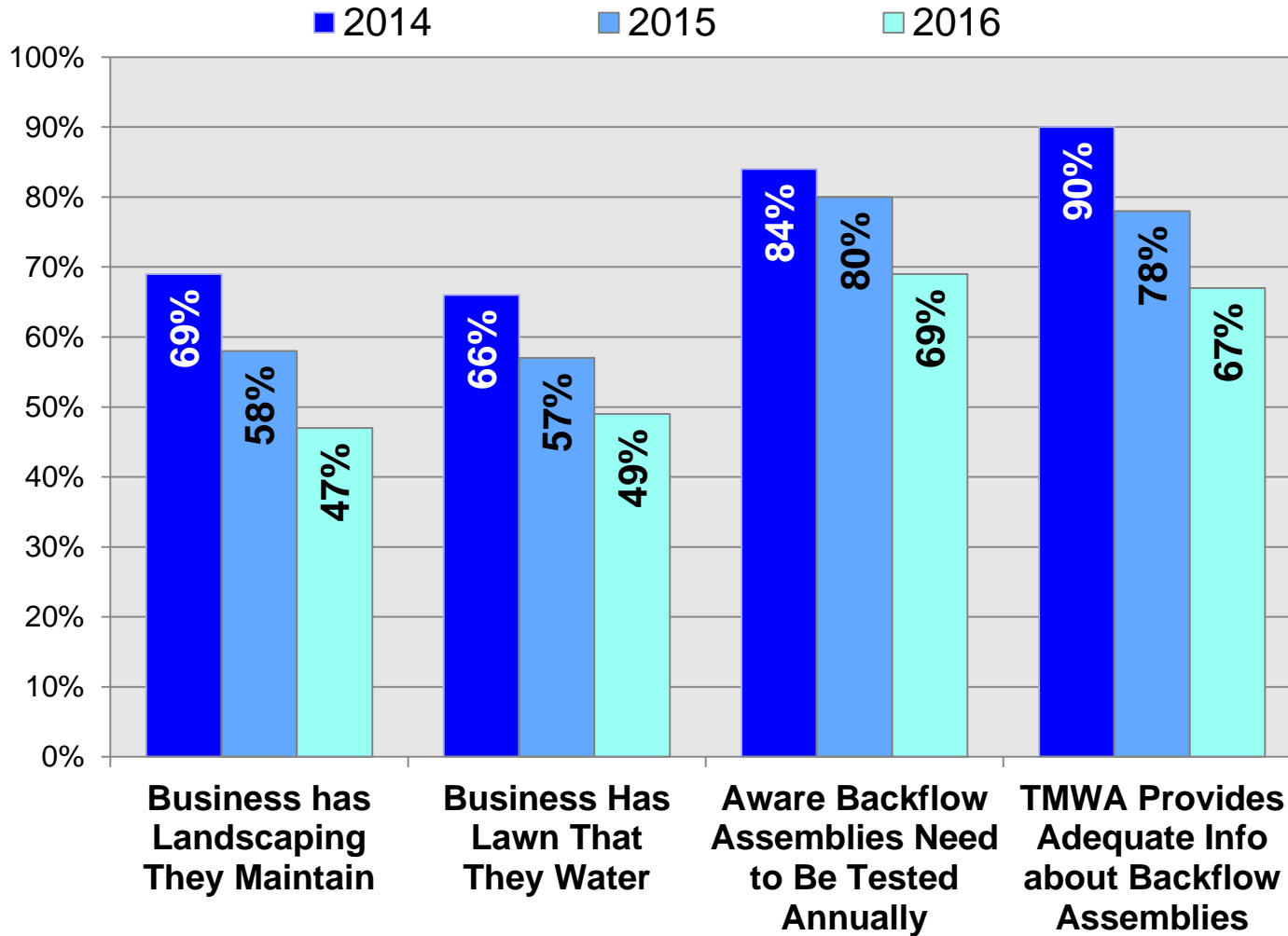
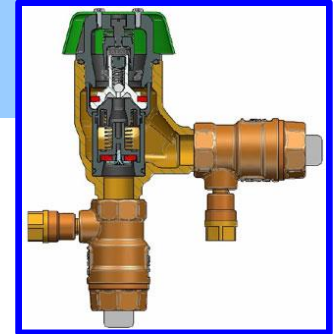
- *“It’s not mobile for me and, also, it’s hard to pay my bill online.”*
- *“When I go to pay online, I always have to redo everything each time.”*
- *“You get charged extra for paying online with a credit card.”*
- *“They should have it so you can pay your bill online and be able to get it processed quickly, so there is no late or processing fee.”*

Select Differences Between Groups – 2016



- **TYPE OF CUSTOMER:** Commercial customers were more likely than were residential customers to be concerned about rate increases.
- **GENDER:** Males were more likely than were females to rate drinking water quality as excellent; females were more likely than were males to be concerned about rate increases, droughts, and a sufficient water supply.
- **LENGTH OF RESIDENCY:** Newer residents were more likely to provide higher ratings for water that looks/tastes good; longer-term residents were more likely to be aware of Assigned Day watering and to be concerned about community growth.
- **HOUSEHOLD INCOME:** Respondents with lower household incomes were more likely to have contacted TMWA in the prior 12 months.
- **AGE GROUP:**
 - Respondents under age 45 were more likely to have accessed their TMWA account online.
 - Respondents age 45-64 were more likely to drink bottled water.
 - Respondents age 65+ were more likely to always read the bill insert and front page message.

Significant Changes among Commercial Respondents – 2014 - 2016



Among commercial respondents:

- The percentage who have landscaping and/or lawns that they maintain has declined.
- Awareness of the need to annually test backflow assemblies has declined.

2016 Summary: Connection to TMWA's Goals and Communication Initiatives



TMWA's Goals for Customer Satisfaction	
<p><u>Residential:</u> Achieve at least 71% favorable ratings; 82%-86% is "excellent" and over 86% is "outstanding"</p>	<p>In 2016, 93% favorable – "Outstanding." Rating remained stable with a similar score as last year (92%).</p>
<p><u>Commercial:</u> Achieve at least 77% favorable ratings; 88%-90% is "excellent" and over 90% is "outstanding"</p>	<p>In 2016, 93% favorable – "Outstanding." Rating remained stable with the same score as last year (93%)."</p>

Communication Initiatives	
<p>Increase awareness of <u>value</u></p>	<p>Stable. In 2016, 75% rated <u>value for price</u> as excellent or good; this was midway between 71% last year and 79% in 2014.</p>
<p>Increase awareness of <u>water quality</u></p>	<p>Increased. In 2016, 58% reported "never" having problems with the taste of the drinking water, up from 52% last year and 45% in 2014.</p>
<p>Increase awareness of opportunities for <u>public input</u> in decision making</p>	<p>Stable. In 2016, the mean rating for using public input was 8.0; this rating has been statistically stable since 2012.</p>

Highlighting Potential Opportunities



1. Enhance education about TMWA facts:

- One out of eleven (9%) is not aware of Assigned Day watering.
- One out of four (28%) is not aware that they can water their lawns 3 days a week.

2. Enhance education about which factors are and are not within TMWA's control:

- *"Pipes in my house are old and affect the taste of my water."*
- *"I don't know how to turn the water off specifically to my home."*
- *"The new homes, they have lawns. We need to conserve water."*

3. Enhance education to address customers' concerns:

- *"I'm worried about the Truckee River being low."*
- *"Afraid that the pipes are in the same shape like in Flint, Michigan; afraid that our water supply will turn out like Flint."*
- *"I don't know what the water company does for safety."*