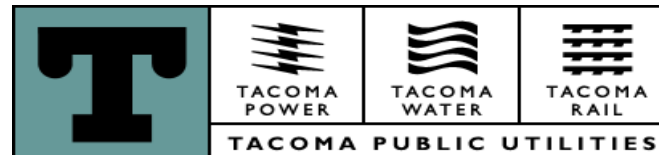


Serving our customers

Residential Customer Satisfaction Survey

Fall 2022

We provide services that are vital to our quality of life.



Methodology

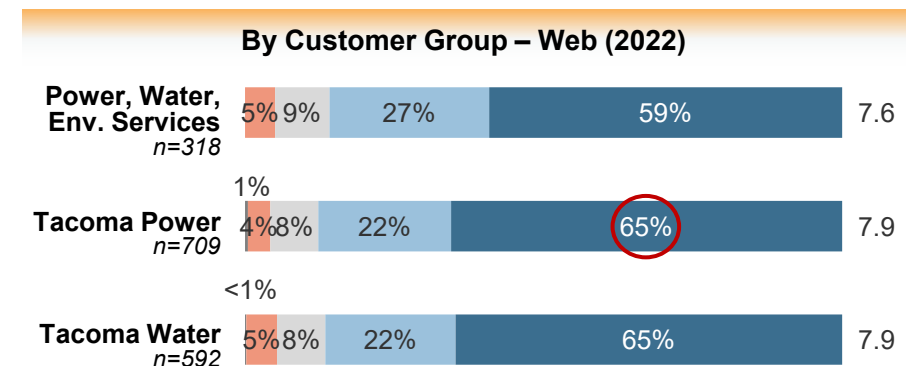
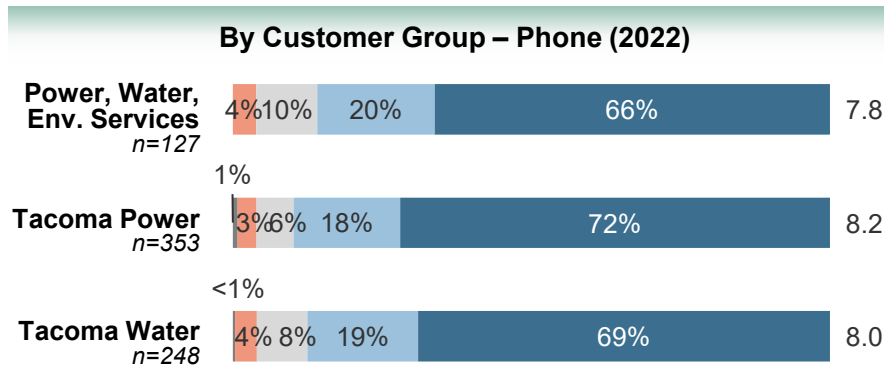
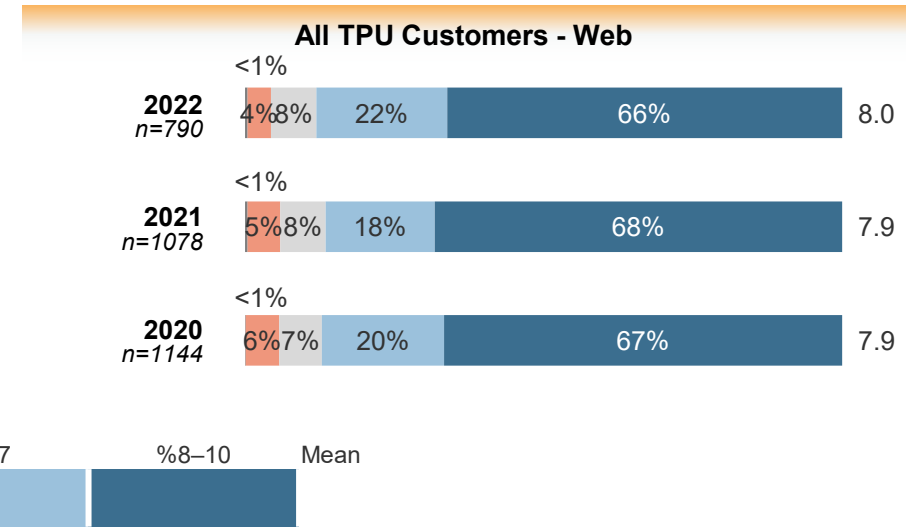
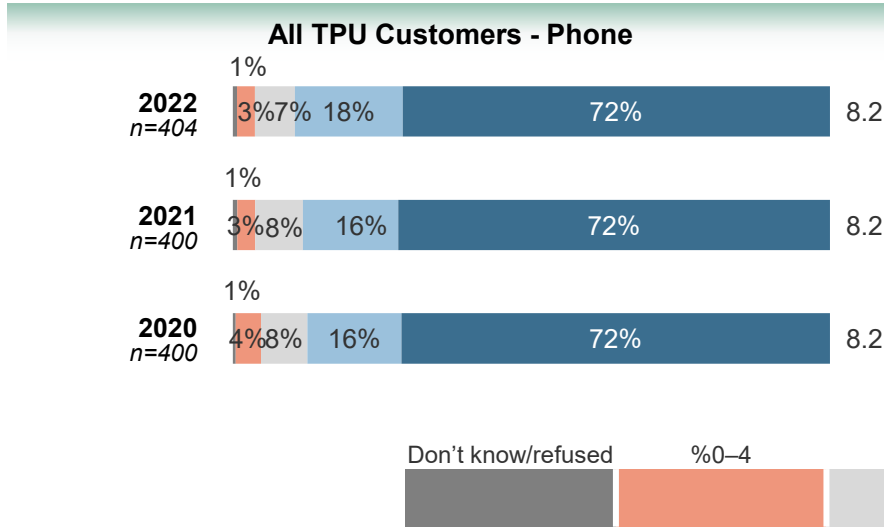
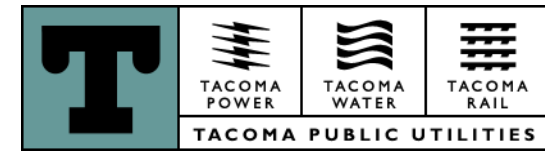
- As in 2018, 2019, 2020, and 2021, data was collected via both telephone interviews and self-administered web surveys among Tacoma Public Utilities’ Residential customers in 2022. Both phone and web surveys were conducted from July 18th to August 4th, 2022. Customer lists provided by Tacoma Public Utilities were used for both the phone and web surveys.
- A total of 404 telephone interviews and 790 web surveys were conducted across five customer types. The telephone quotas were set in proportion to their distribution in the TPU residential customer population while the online interviews were weighted to match this distribution:

	Phone	Web	Weighted Web
	<i>n</i> =	<i>n</i> =	<i>n</i> =
Power, Water, and Environmental Services	127	318	246
Power only single-family	104	157	202
Power only multi-family	88	151	173
Water only	51	81	103
Power and Water only	34	83	66

- In proportion to the primary contact phone number type (landline or mobile) provided to TPU by Residential customers, 24% of phone respondents were contacted via their landline phone, and 76% were contacted via their mobile phone.
- Tacoma Public Utilities was identified as the study sponsor.
- Residential customers were screened and qualified based on the following criteria:
 - Head or co-head of household who is familiar with their TPU services
 - Adult, 18 years of age and older.
- The sampling error for 404 telephone interviews is +/-4.9% at the 95% confidence level.
- The sampling error for 790 online interviews is +/-3.5% at the 95% confidence level.

Overall Satisfaction

Overall Satisfaction: Tacoma Public Utilities

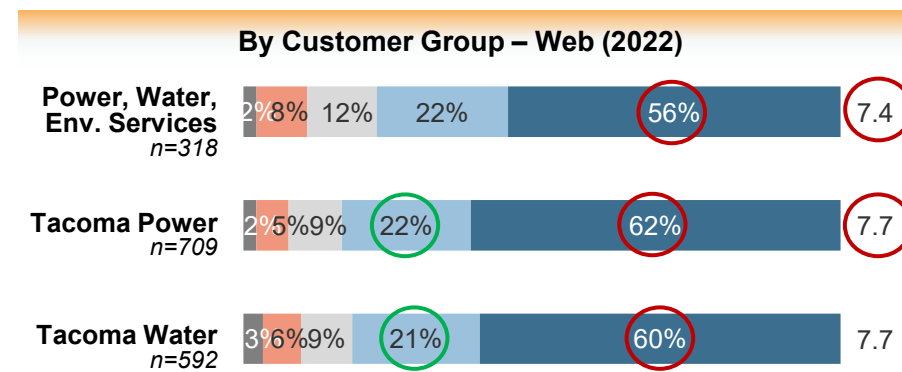
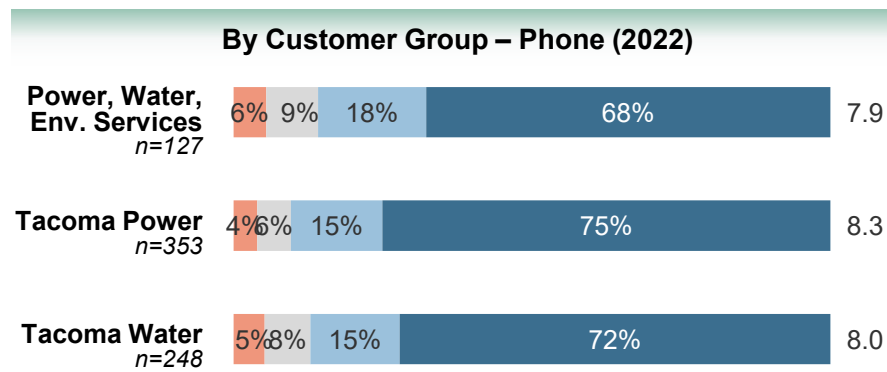
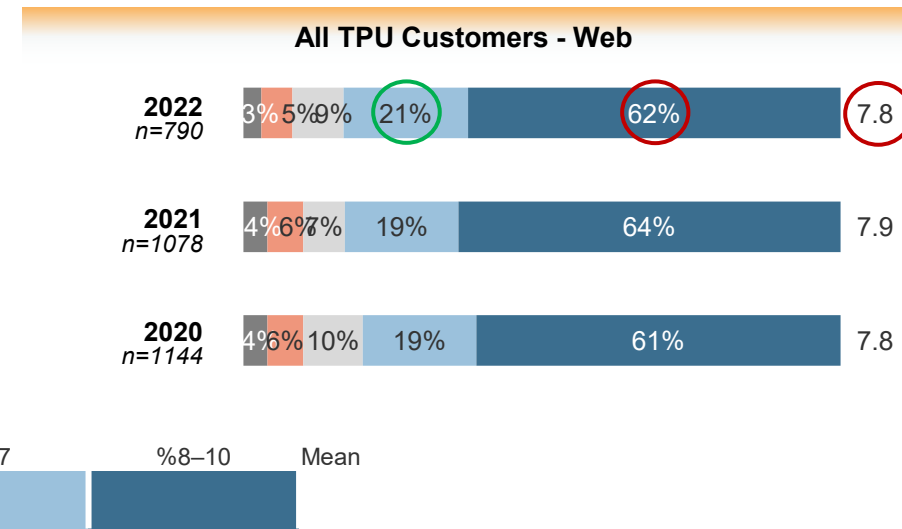
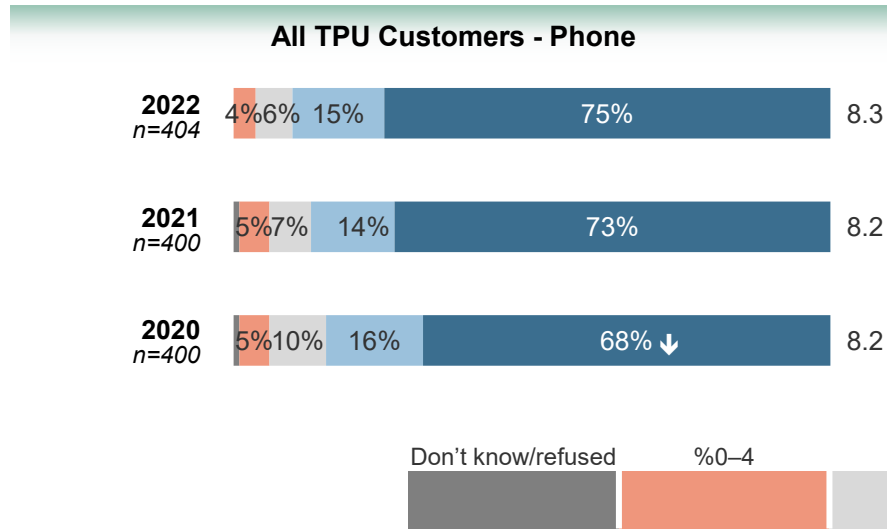


Q2. Overall, how satisfied or dissatisfied are you with Tacoma Public Utilities as a provider of services in your area in general, and not necessarily just those of which you are a current customer or user?

↑↓ Indicate significant differences between the current wave and previous waves. ○ / ● circles indicate significantly higher/lower percentages for 2022 web results versus the 2022 phone results.

Management Reputation Measures

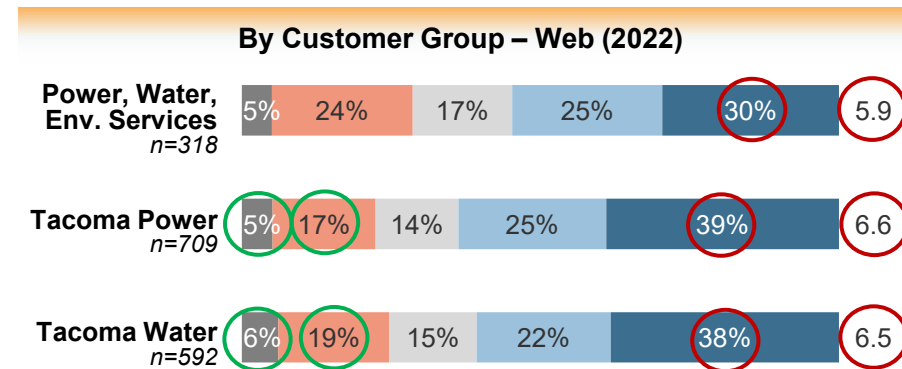
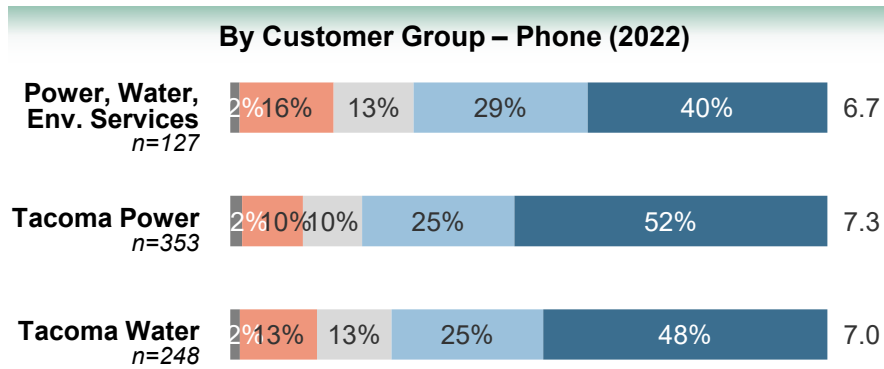
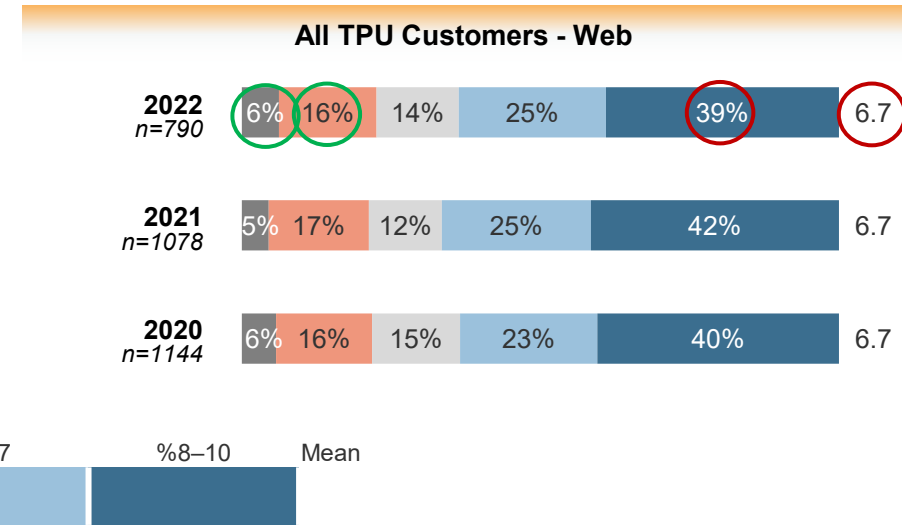
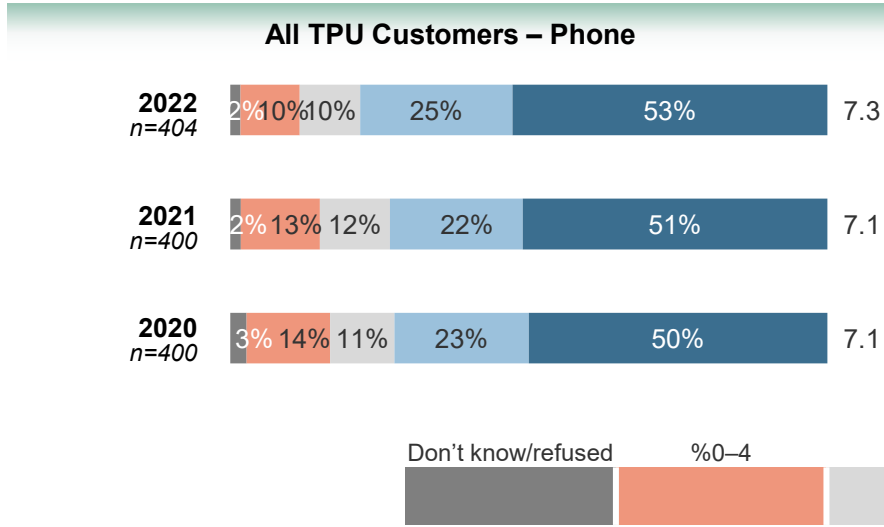
Being an Organization You Can Trust



How would you rate T-P-U's performance with regard to...?
TRUST. Being an organization you can trust

↑↓ Indicate significant differences between the current wave and previous waves. ○ / ● circles indicate significantly higher/lower percentages for 2022 web results versus the 2022 phone results.

Controlling Costs

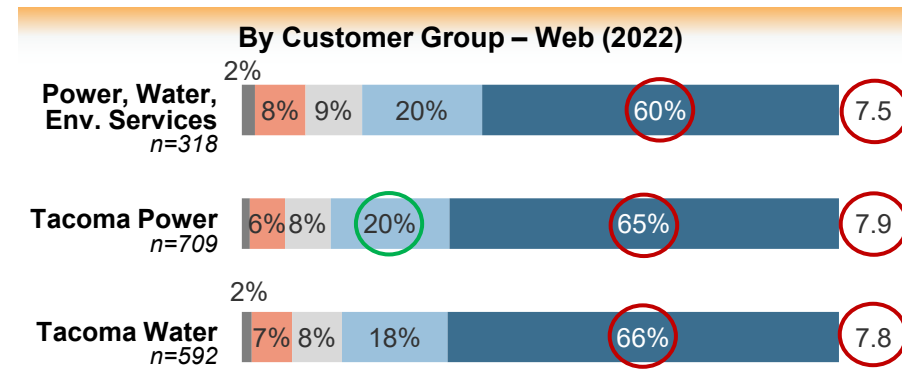
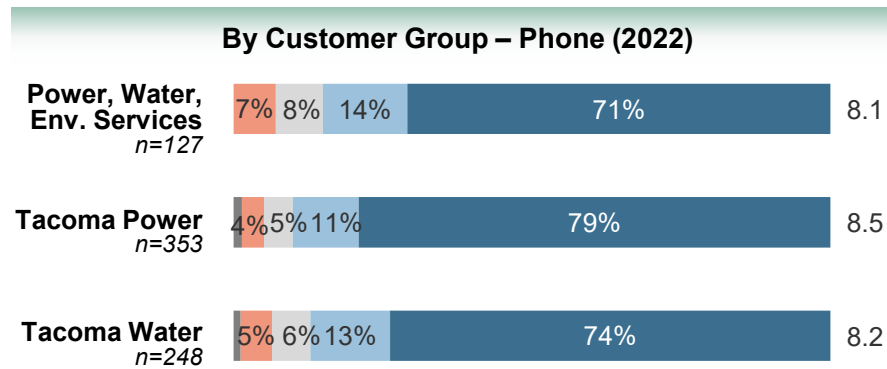
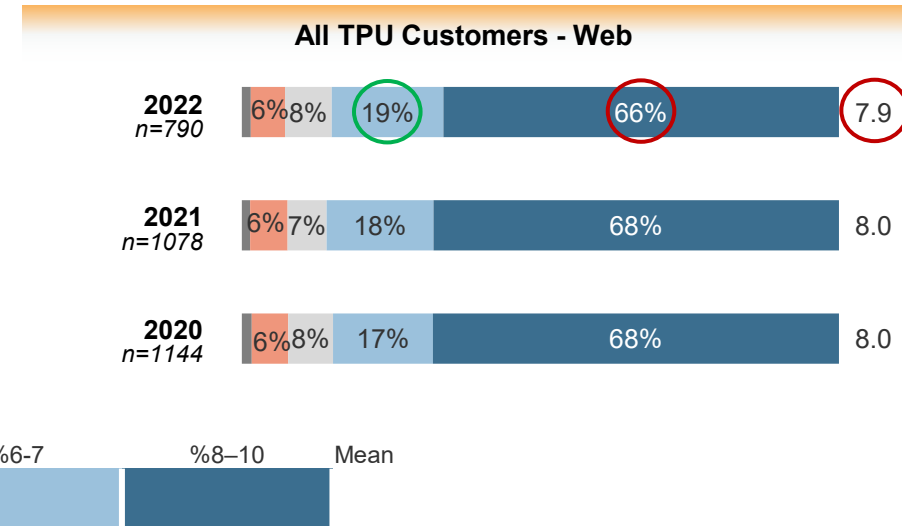
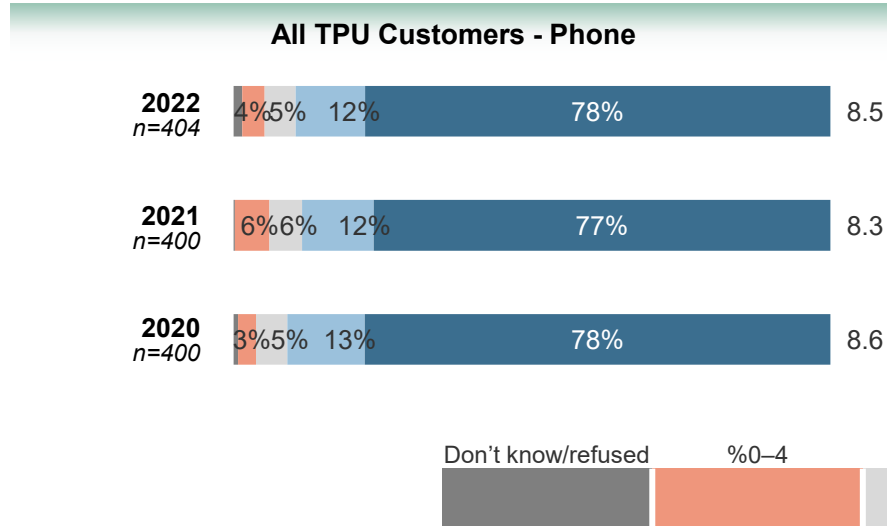


How would you rate T-P-U's performance with regard to...?
COSTC. Controlling costs to keep rates low

↑↓ Indicate significant differences between the current wave and previous waves. ○ / ○ circles indicate significantly higher/lower percentages for 2022 web results versus the 2022 phone results.

Service Measures

Being Easy to Do Business with

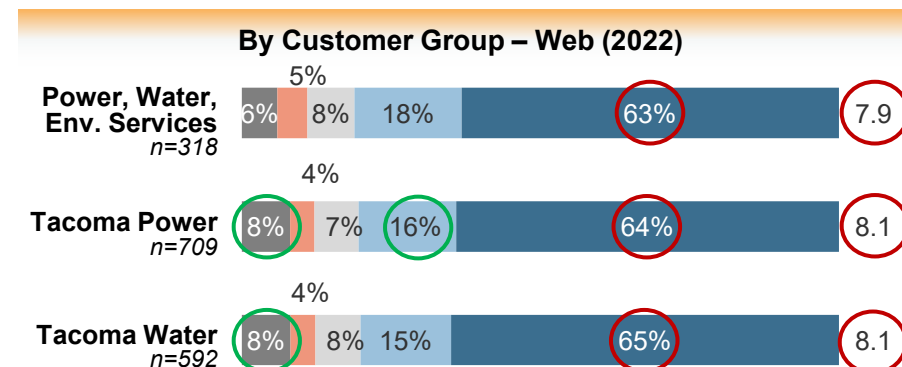
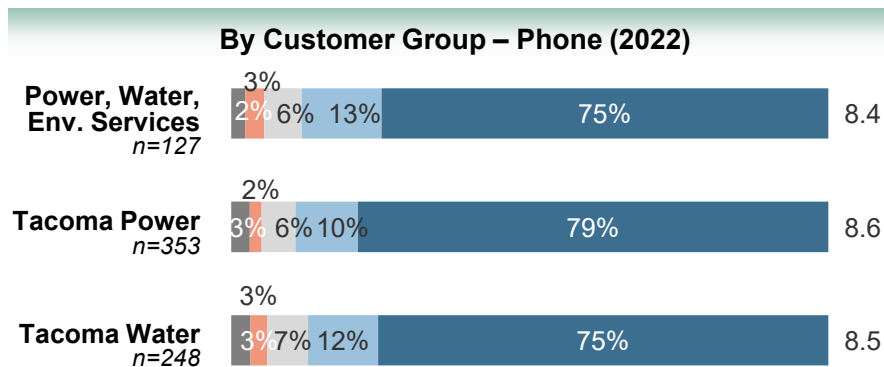
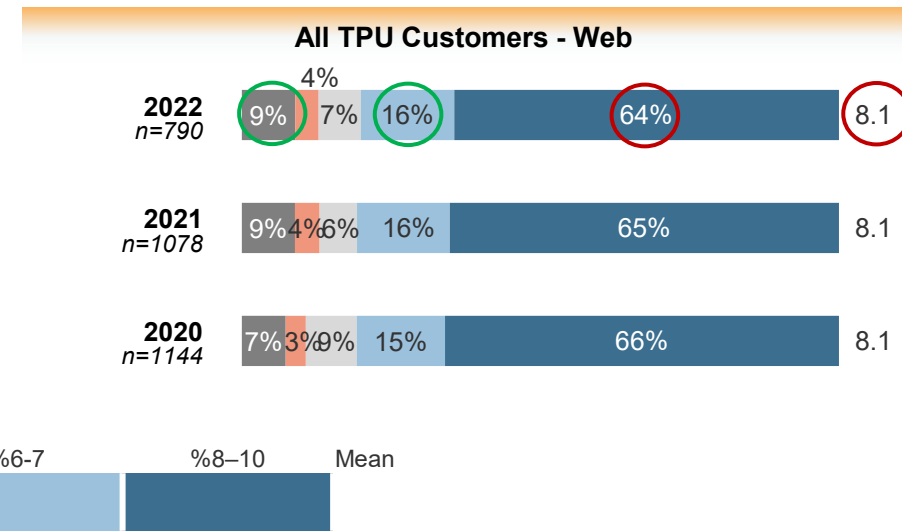
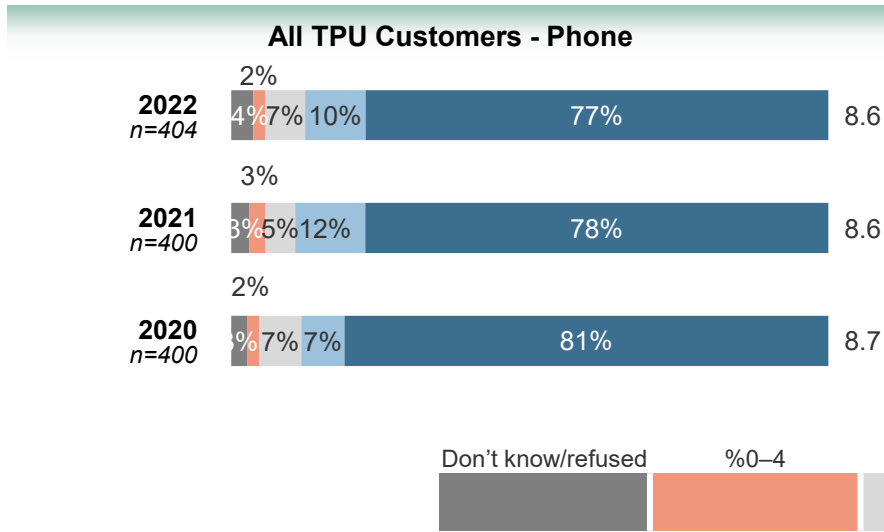


How would you rate T-P-U's performance with regard to...?
EASYBUS. Being easy to do business with

↑↓ Indicate significant differences between the current wave and previous waves.

○ / ○ circles indicate significantly higher/lower percentages for 2022 web results versus the 2022 phone results.

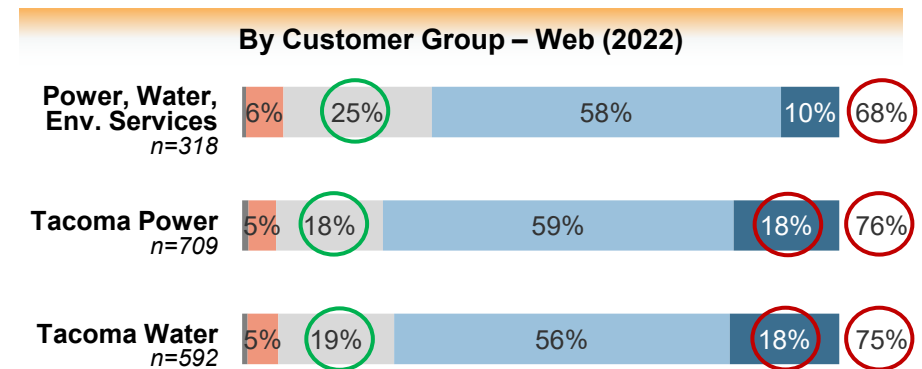
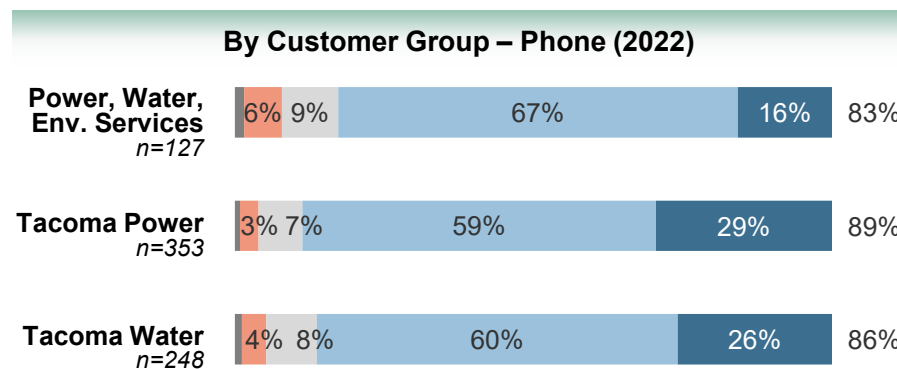
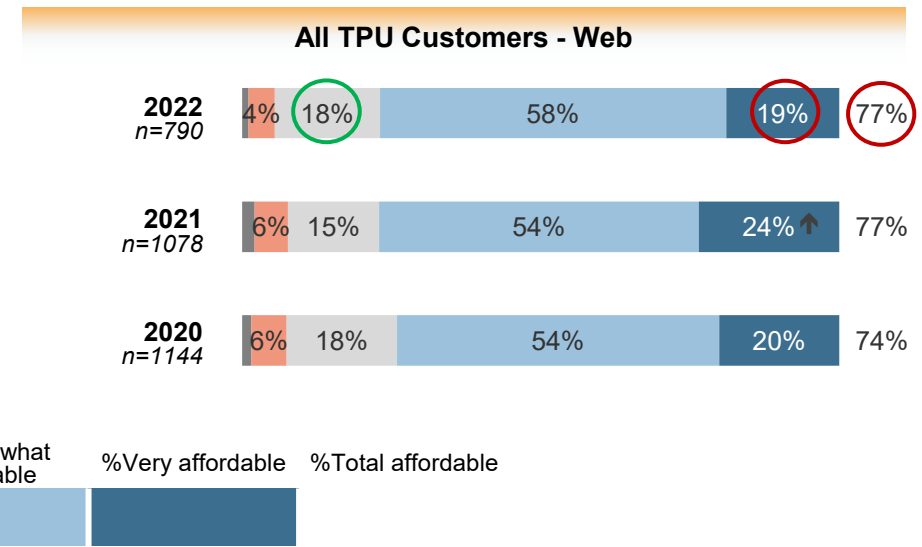
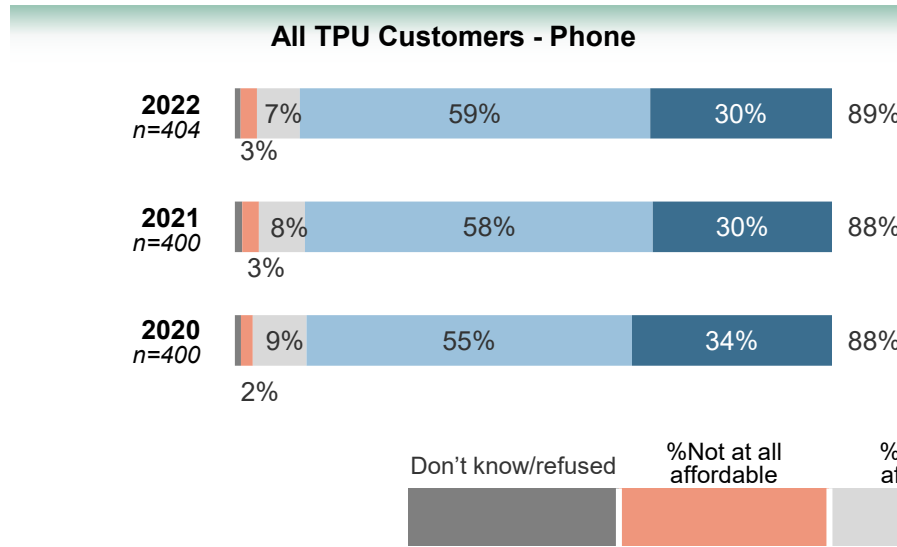
Having Knowledgeable and Well-trained Employees



How would you rate T-P-U's performance with regard to...?
 KNOWLEDG. Having knowledgeable and well-trained employees

↑↓ Indicate significant differences between the current wave and previous waves. ○ / ○ circles indicate significantly higher/lower percentages for 2022 web results versus the 2022 phone results.

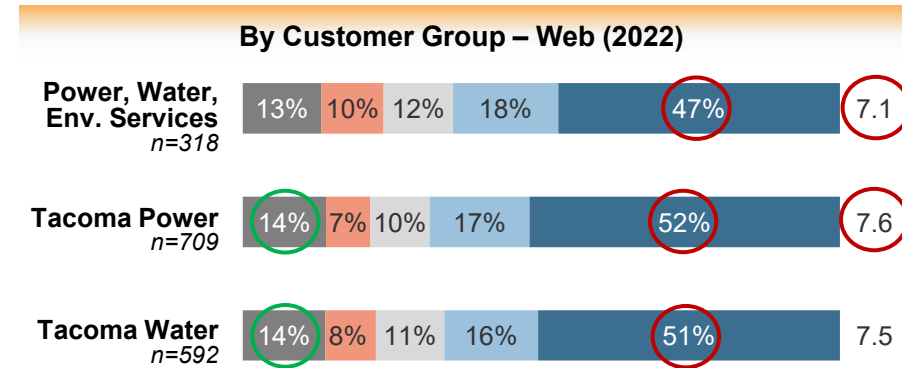
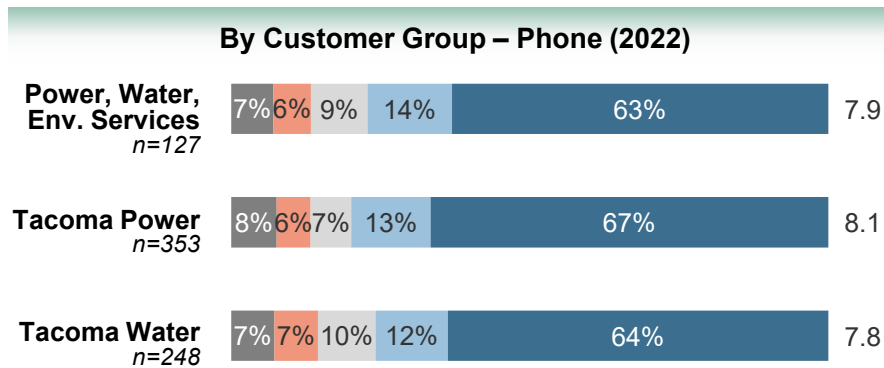
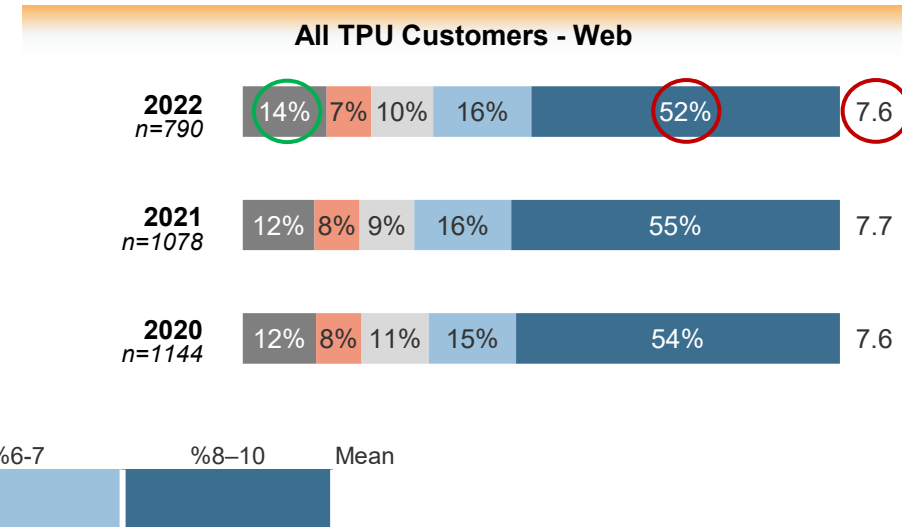
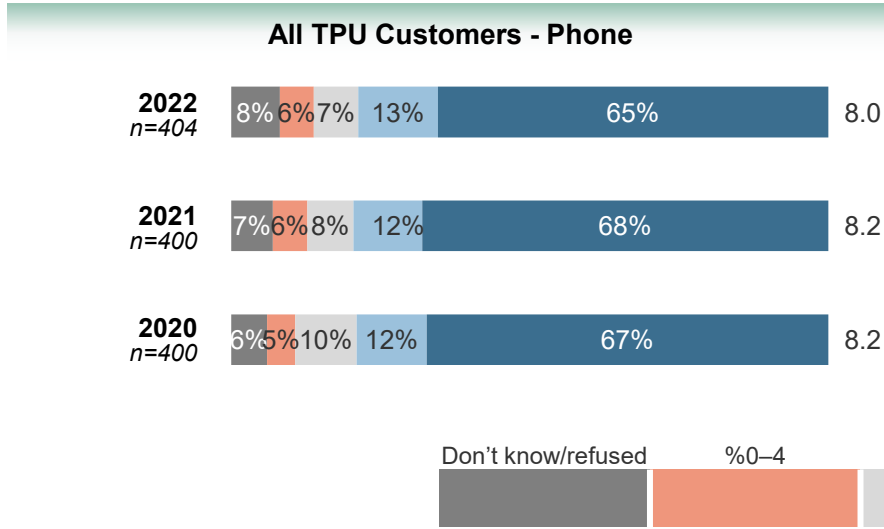
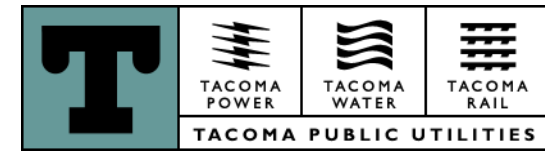
Bill Affordability



BILLAFF. Given your household's financial circumstances, would you characterize the bills you receive from T-P-U as being...?

↑↓ Indicate significant differences between the current wave and previous waves. ○ / ○ circles indicate significantly higher/lower percentages for 2022 web results versus the 2022 phone results.

Offering Assistance to Customers in Need*

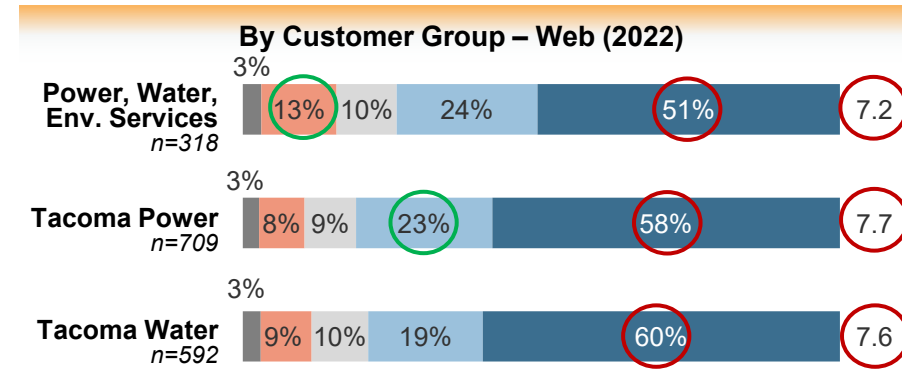
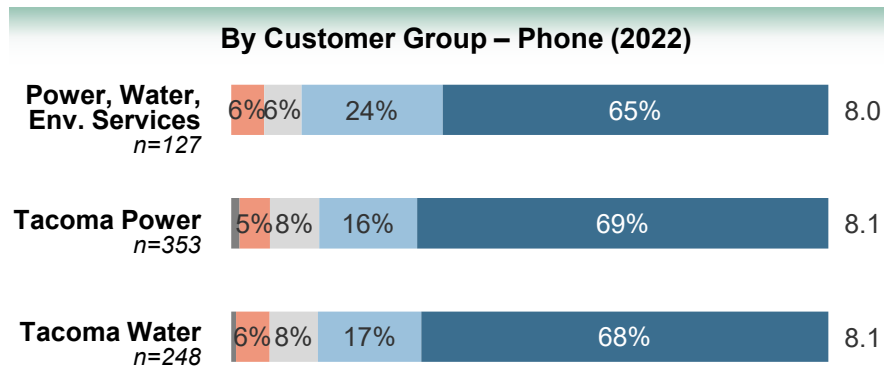
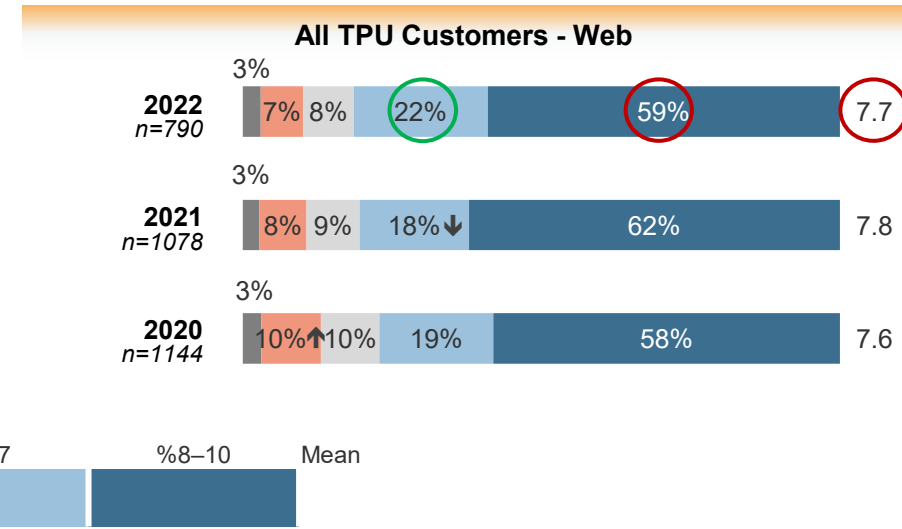
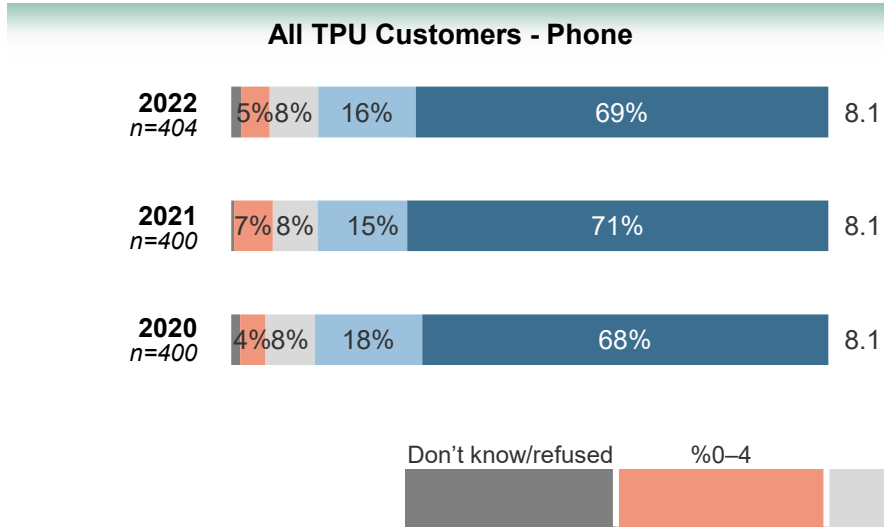


*In 2020, BILLAST was changed from “Offering assistance to customers who are behind on paying their utility bills” to “Offering assistance to customers in need.”

How would you rate T-P-U’s performance with regard to...?
BILLAST. Offering assistance to customers in need

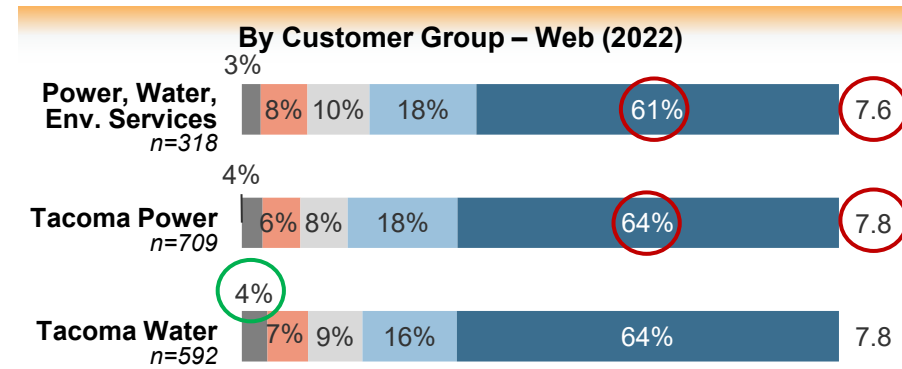
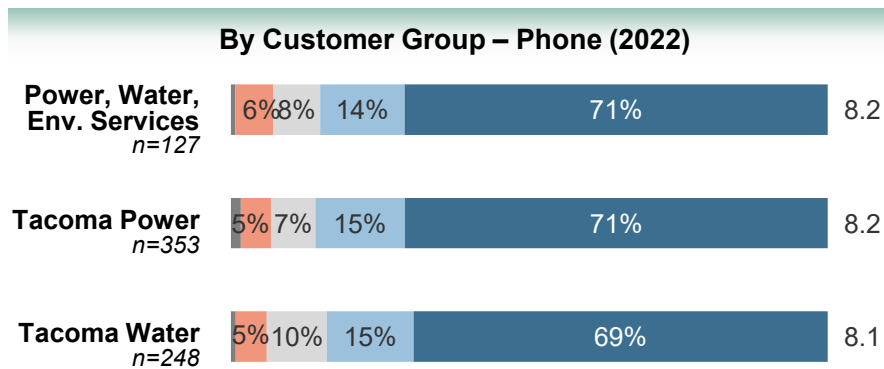
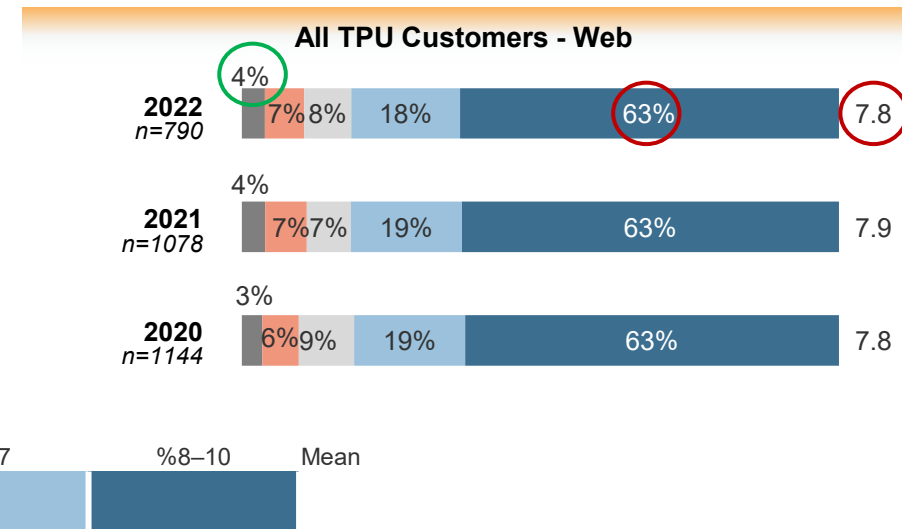
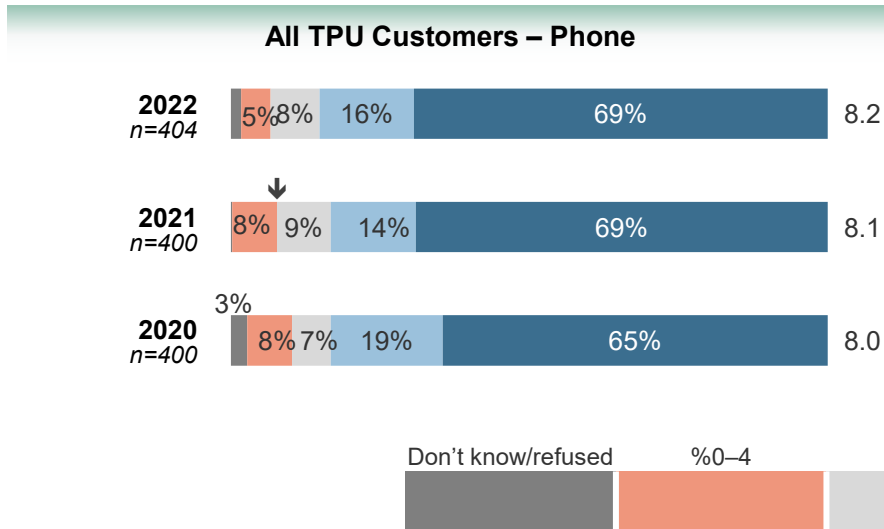
↑↓ Indicate significant differences between the current wave and previous waves. ○ / ○ circles indicate significantly higher/lower percentages for 2022 web results versus the 2022 phone results.

Providing Helpful Information about How to Conserve and Lower Your Utility Bills



How would you rate T-P-U's performance with regard to...?
 CONSINFO. Providing helpful information about how to conserve and lower your utility bills
 ↑↓ Indicate significant differences between the current wave and previous waves. ○ / ○ circles indicate significantly higher/lower percentages for 2022 web results versus the 2022 phone results.

Keeping You Informed about TPU Activities, Programs and Services

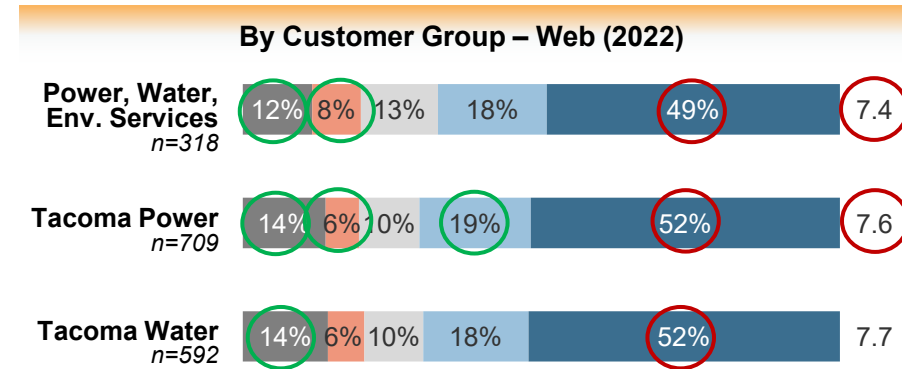
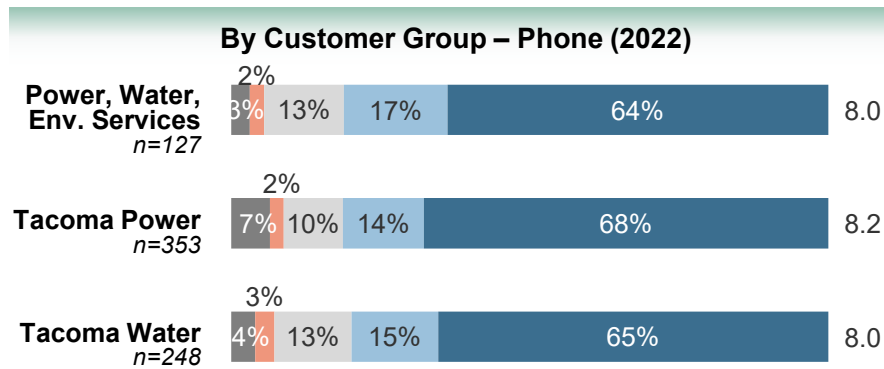
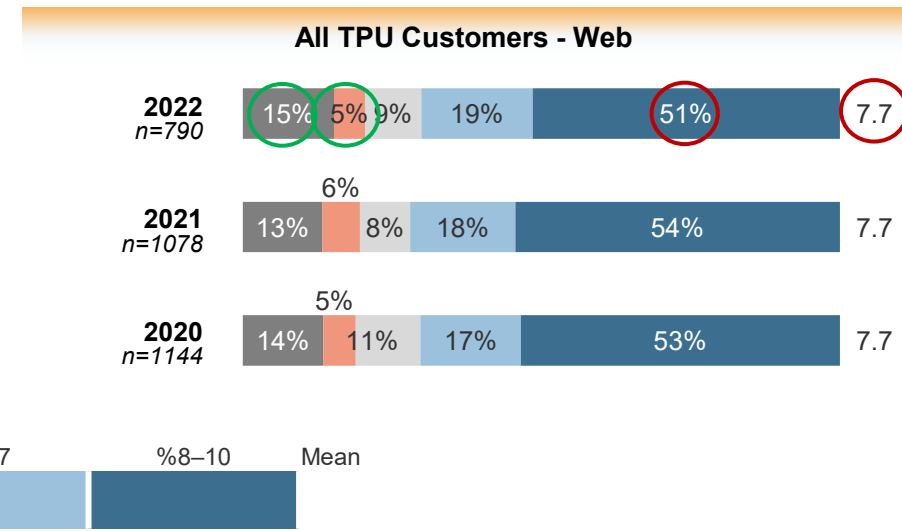
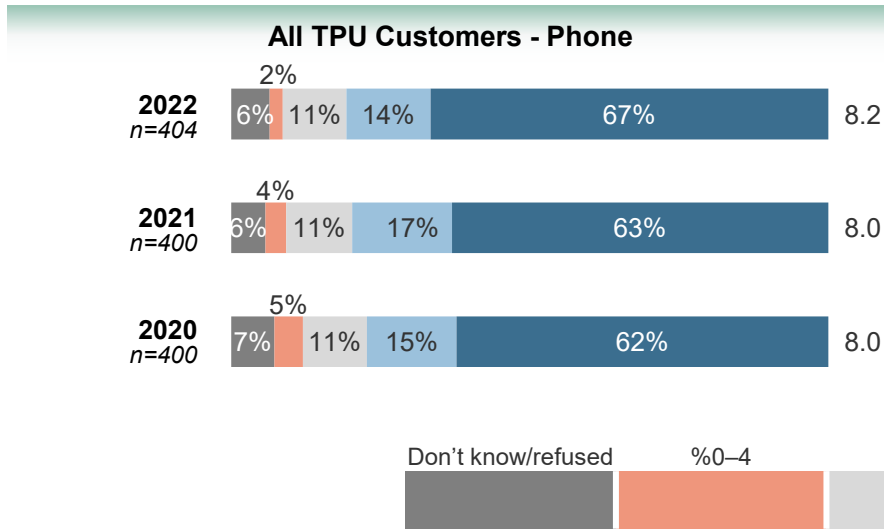


How would you rate T-P-U's performance with regard to...?
INFORM. Keeping you informed about TPU activities, programs and services

↑↓ Indicate significant differences between the current wave and previous waves.

○ / ○ circles indicate significantly higher/lower percentages for 2022 web results versus the 2022 phone results.

Being Environmentally Responsible

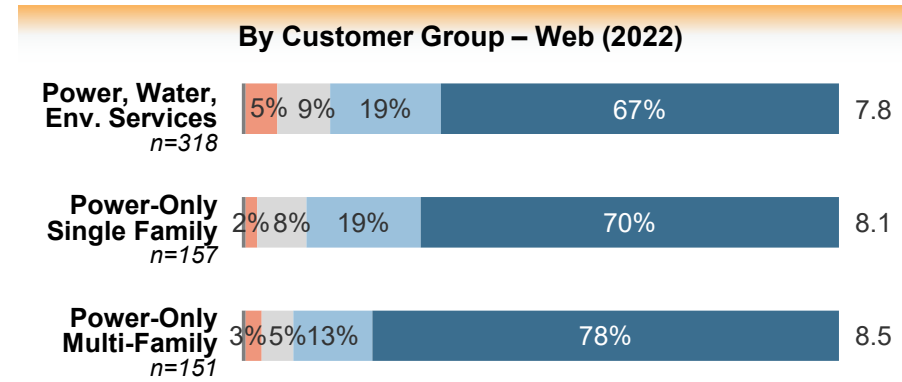
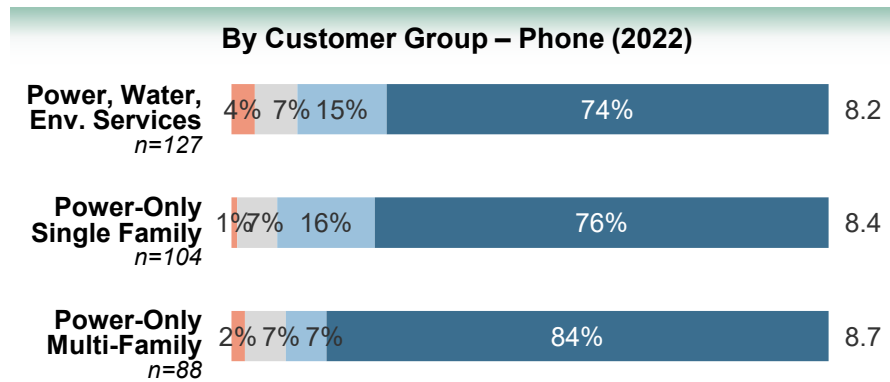
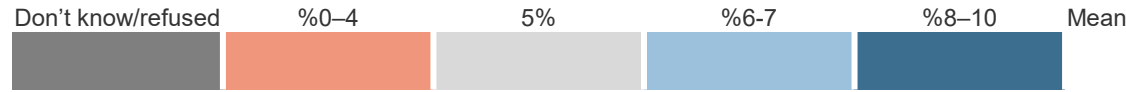
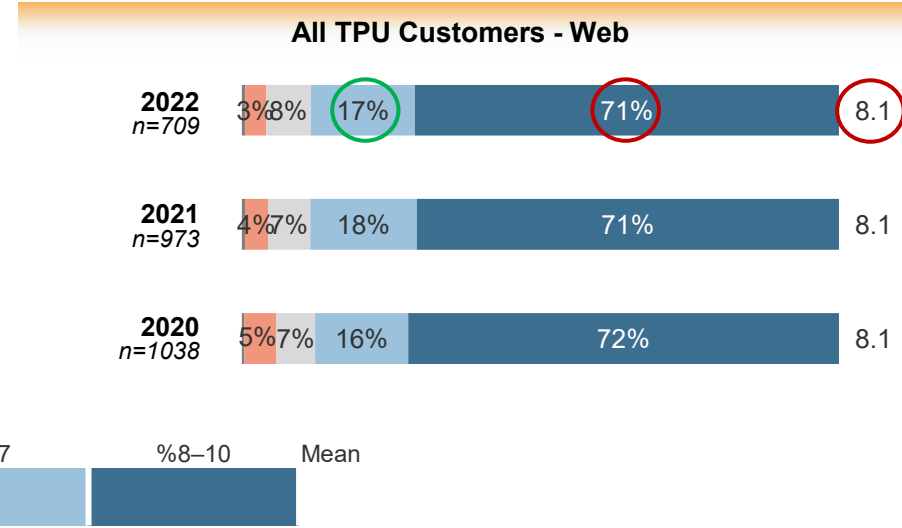
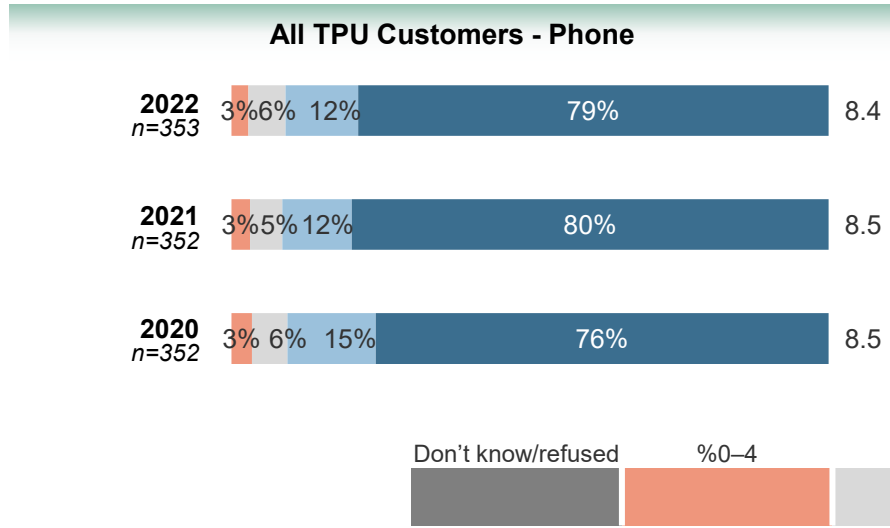


How would you rate T-P-U's performance with regard to...?
ENVRESP. Being environmentally responsible

↑↓ Indicate significant differences between the current wave and previous waves. ○ / ○ circles indicate significantly higher/lower percentages for 2022 web results versus the 2022 phone results.

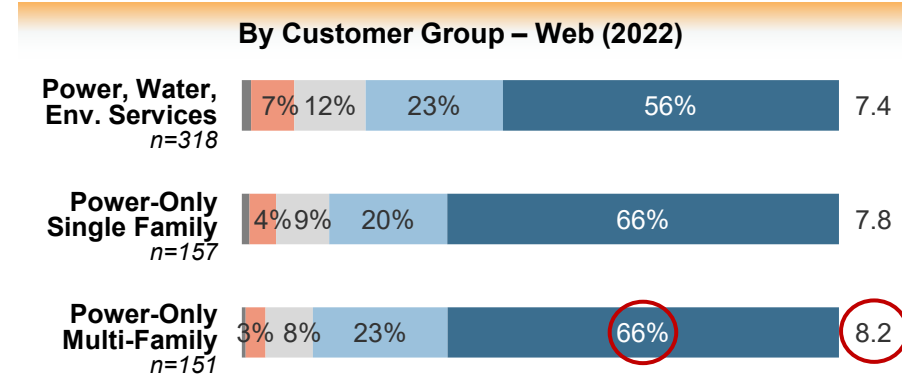
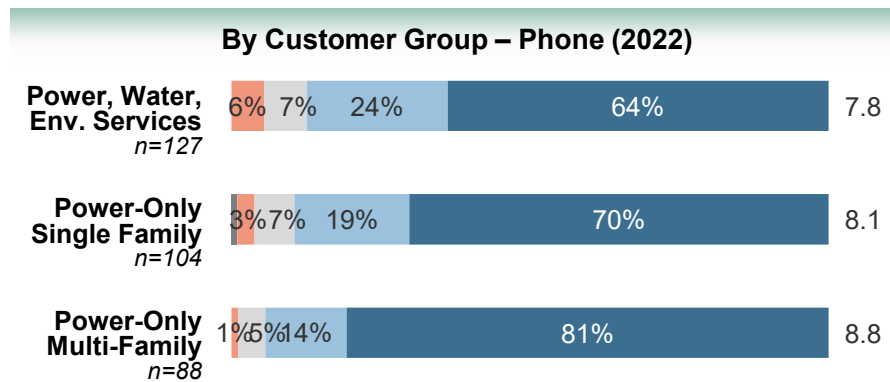
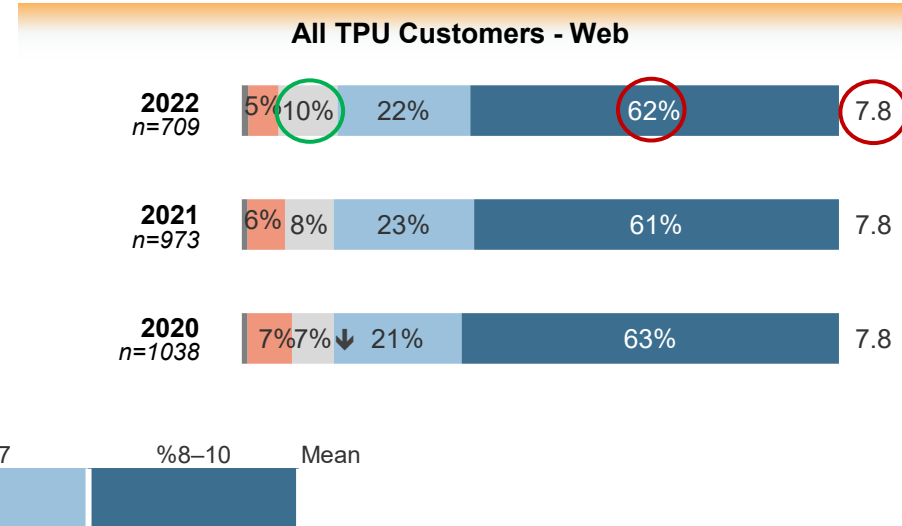
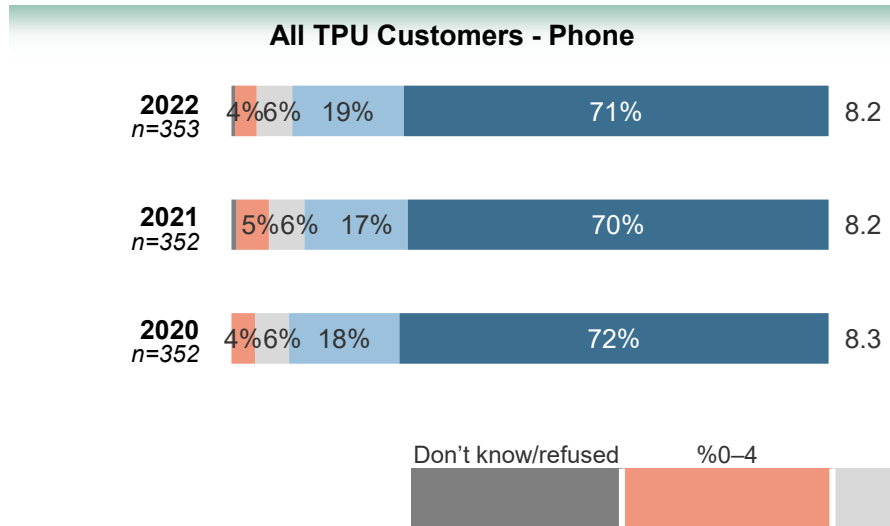
Electric Service Measures

Overall Satisfaction with Electric Service Provided by Tacoma Power



Q3_1. Based on your overall experience as a customer, and using that same scale, how satisfied or dissatisfied are you with electric service provided by Tacoma Power
 ↑↓ Indicate significant differences between the current wave and previous waves. ○ / ○ circles indicate significantly higher/lower percentages for 2022 web results versus the 2022 phone results.

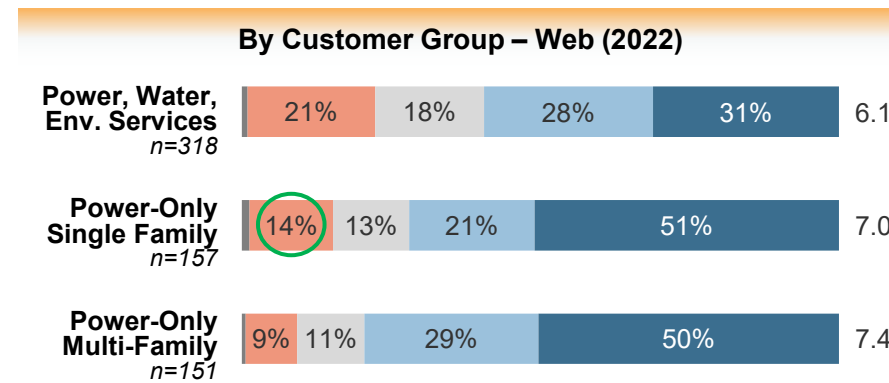
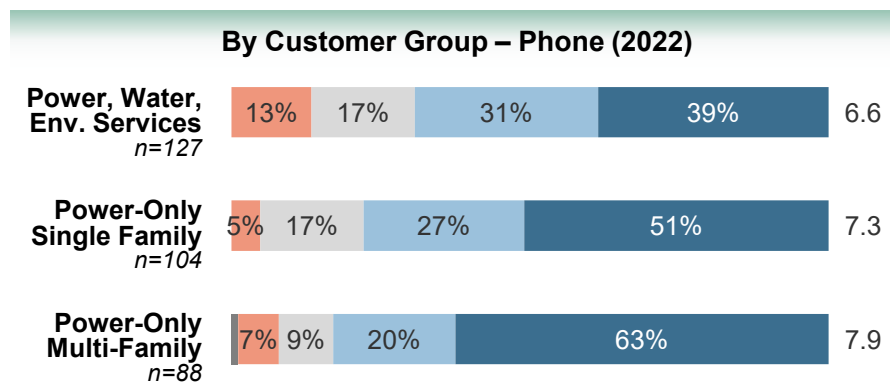
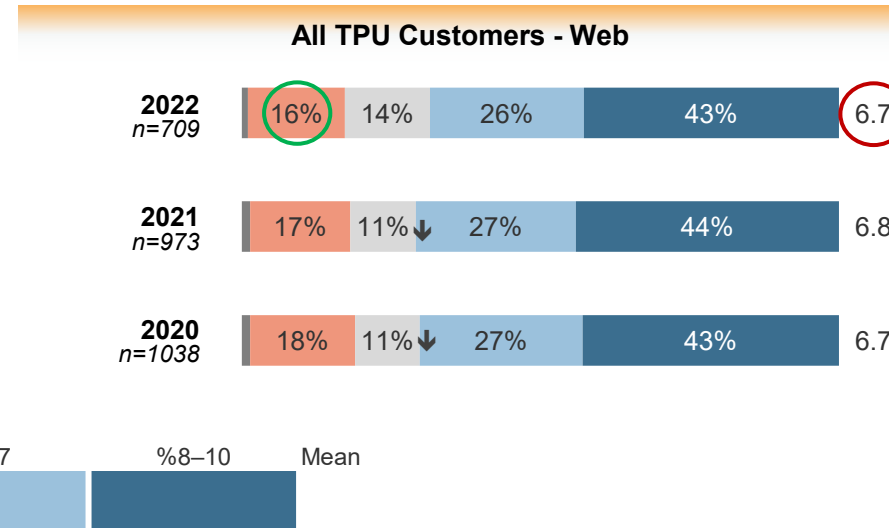
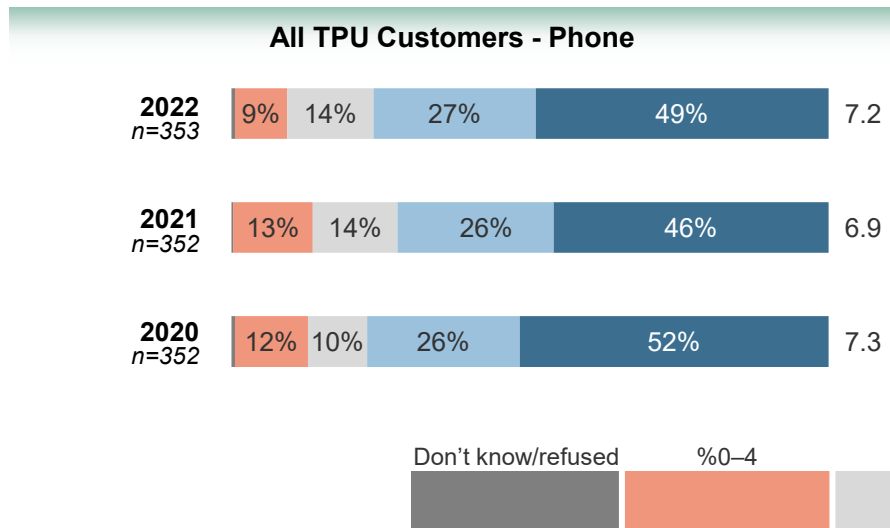
Value of Electric Service



Q12. Using the scale from a 0 to 10 scale where a 0 means you receive a very poor value and a 10 means you receive a very good value, how would you rate the value you receive from Tacoma Power in terms of the electric service you receive.

↑↓ Indicate significant differences between the current wave and previous waves. ○ / ○ circles indicate significantly higher/lower percentages for 2022 web results versus the 2022 phone results.

Reasonableness of Electric Rates

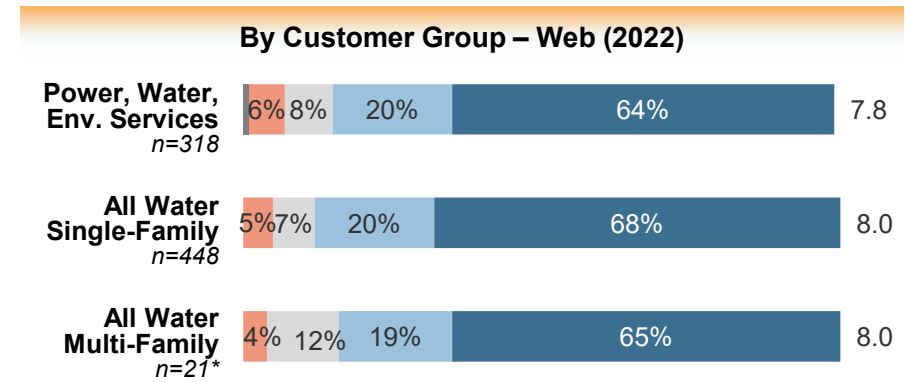
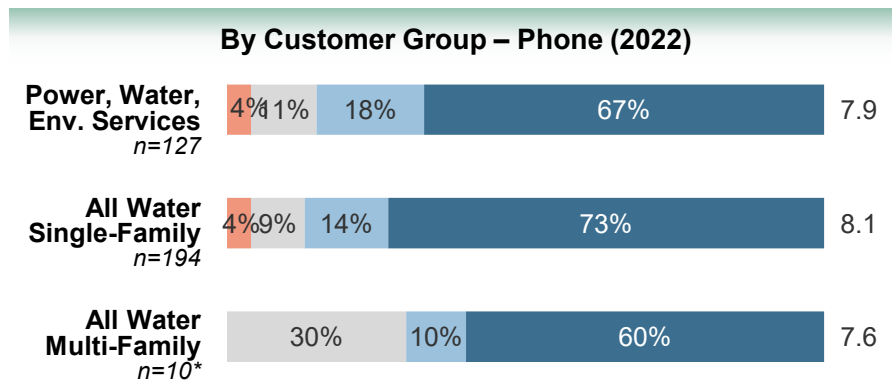
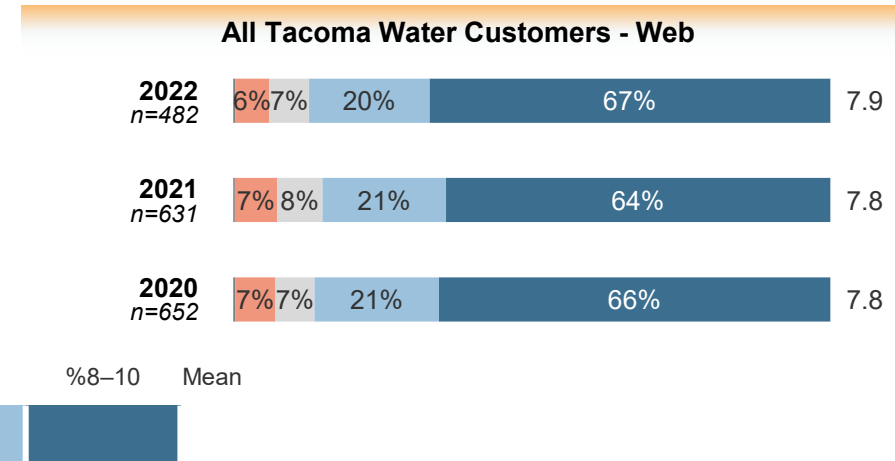
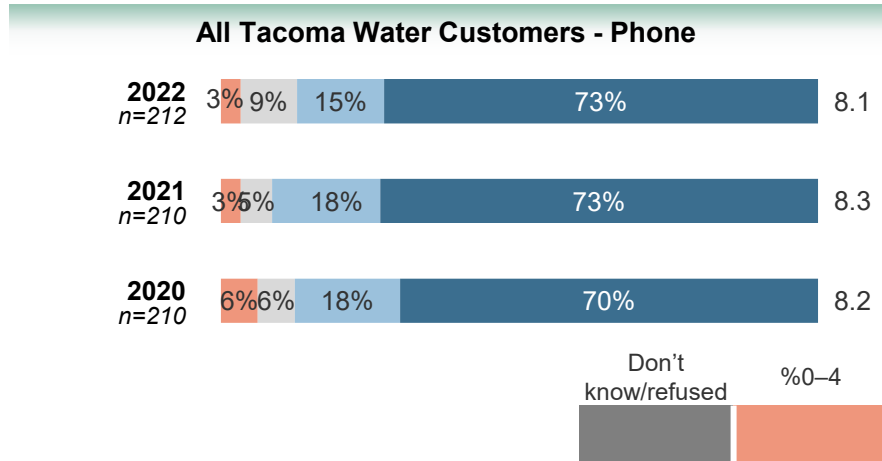


RATESE. In general, to what extent do you think the rates you pay for the electric service you receive from Tacoma Power are reasonable?

↑↓ Indicate significant differences between the current wave and previous waves. ○ / ○ circles indicate significantly higher/lower percentages for 2022 web results versus the 2022 phone results.

Water Service Measures

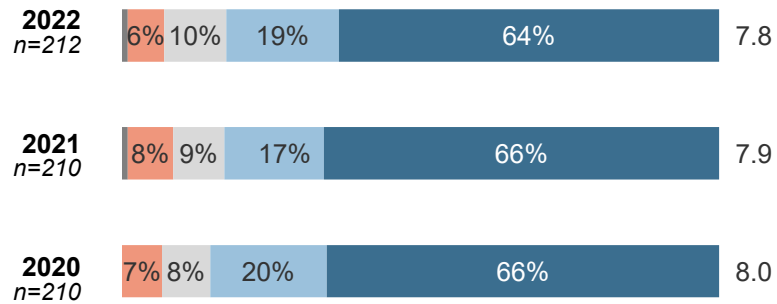
Overall Satisfaction with the Water Service from Tacoma Water



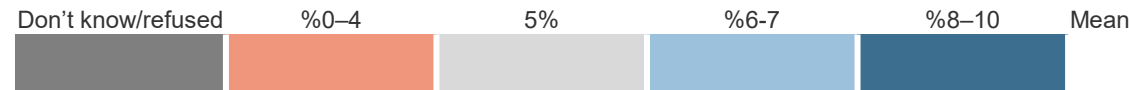
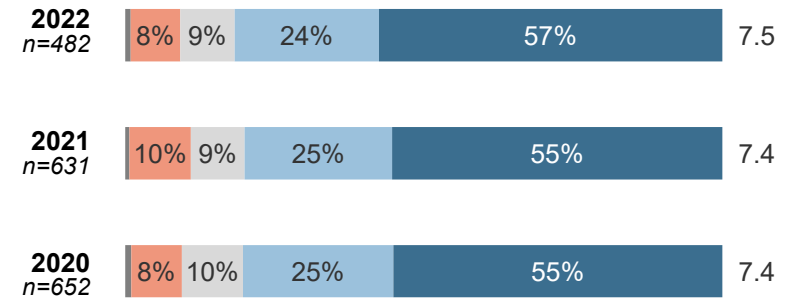
Q3_2 . Based on your overall experience as a customer, and using that same scale, how satisfied or dissatisfied are you with water service provided by Tacoma Water
 ↑↓ Indicate significant differences between the current wave and previous waves. ○ / ● circles indicate significantly higher/lower percentages for 2022 web results versus the 2022 phone results.

Value of Water Service

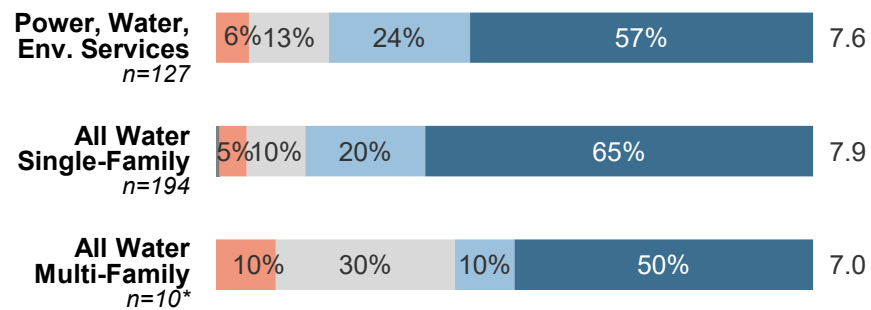
All Tacoma Water Customers - Phone



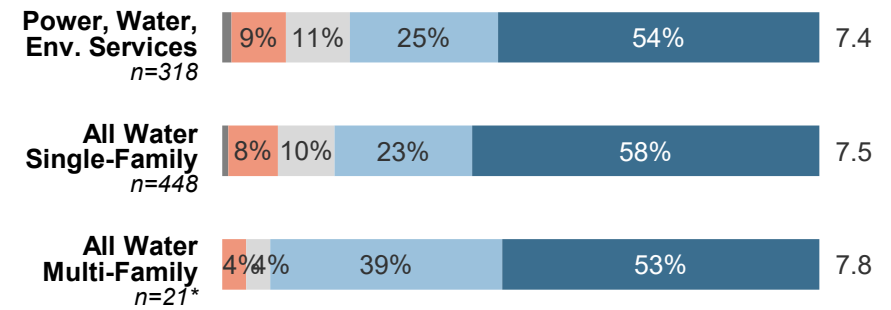
All Tacoma Water Customers - Web



By Customer Group – Phone (2022)



By Customer Group – Web (2022)



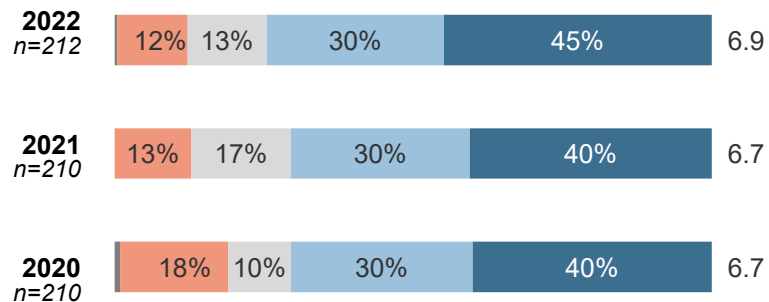
*Base size <30, interpret results with caution, ** Insufficient sample size (n<10).

Q13. Using the scale from a 0 to 10 scale where a 0 means you receive a very poor value and a 10 means you receive a very good value, how would you rate the value you receive from Tacoma Water in terms of the water service you receive

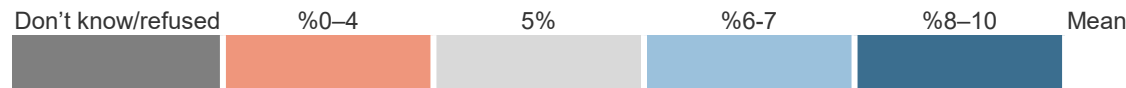
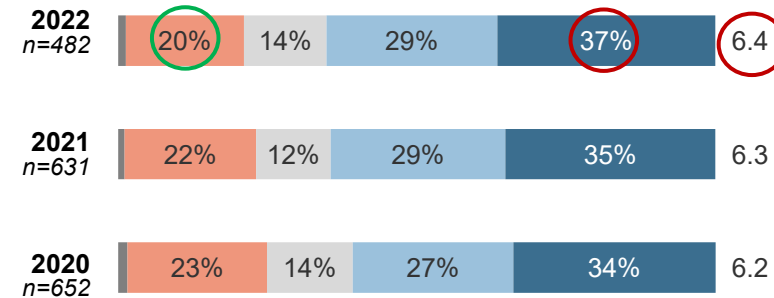
↑↓ Indicate significant differences between the current wave and previous waves. ○ / ○ circles indicate significantly higher/lower percentages for 2022 web results versus the 2022 phone results.

Reasonableness of Water Rates

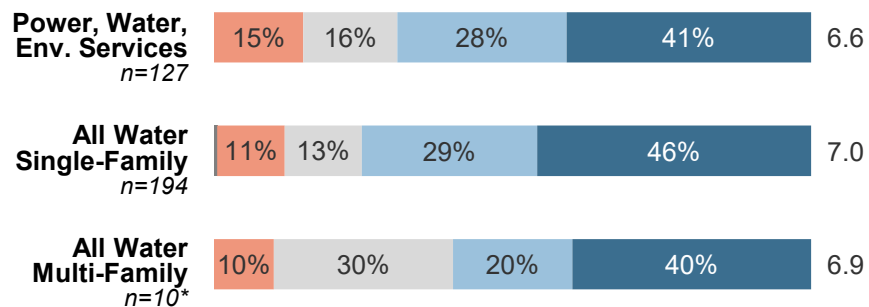
All Tacoma Water Customers - Phone



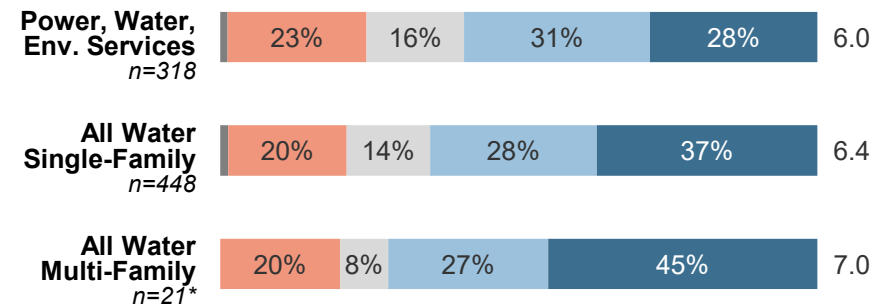
All Tacoma Water Customers - Web



By Customer Group – Phone (2022)



By Customer Group – Web (2022)



**Base size <30, interpret results with caution, ** Insufficient sample size (n<10).

RATESW. In general, to what extent do you think the rates you pay for the water service you receive from Tacoma Water are reasonable?

Please answer using a scale from 0 to 10 where a 0 means you think they are extremely unreasonable and a 10 means you think they are extremely reasonable.

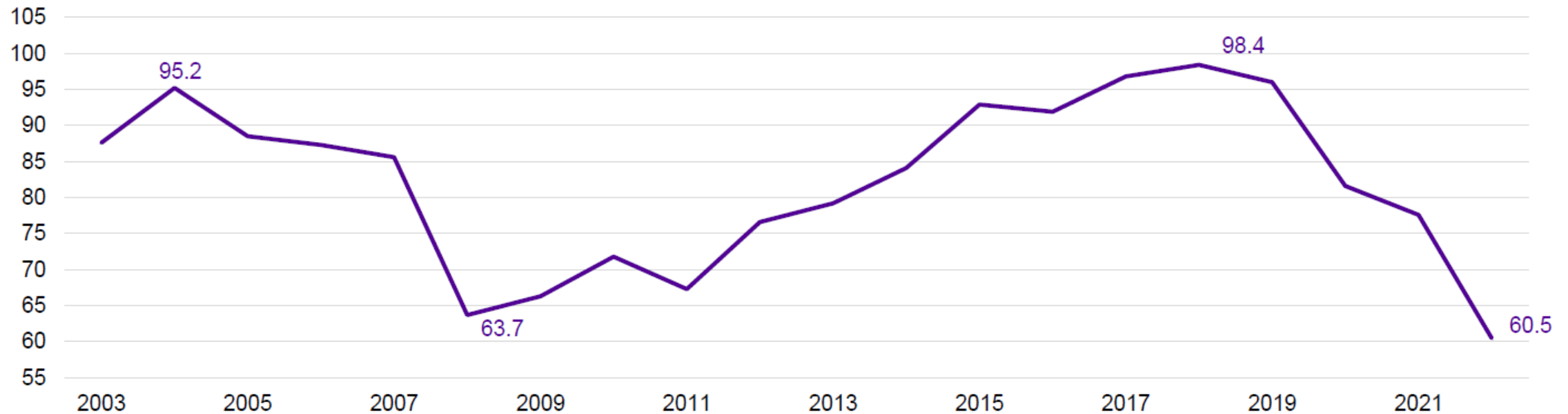
↑↓ Indicate significant differences between the current wave and previous waves. ○ / ○ circles indicate significantly higher/lower percentages for 2022 web results versus the 2022 phone results.

Economic & Financial Sentiment

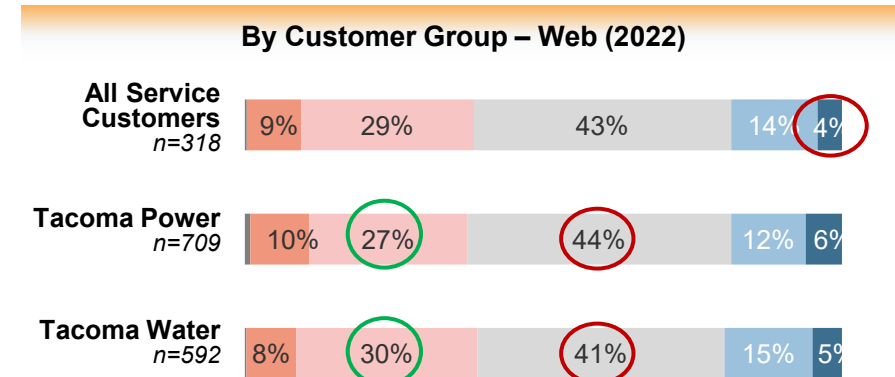
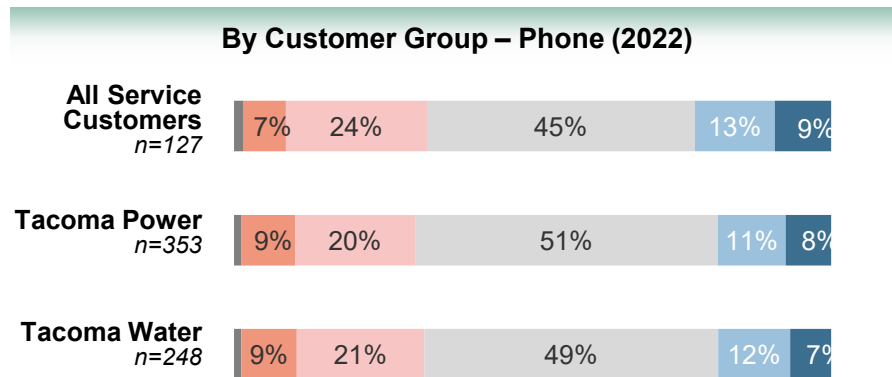
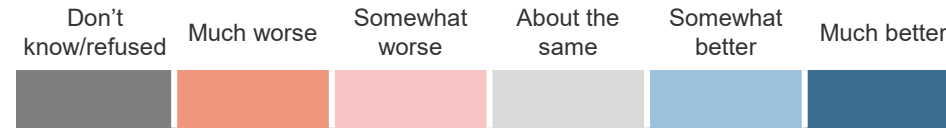
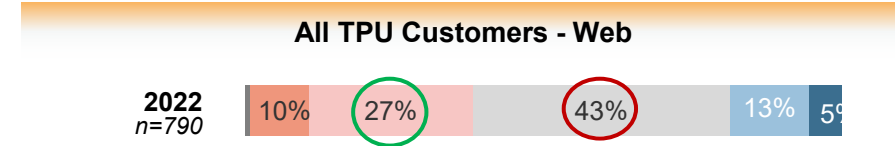
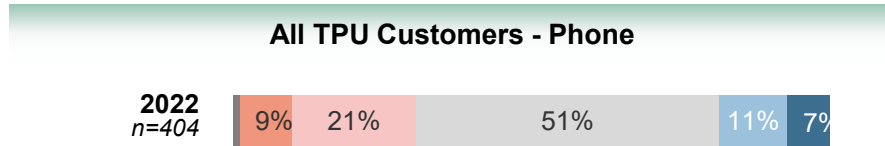
Consumer confidence is at levels never recorded before

- The lowest print ever for yearly CSI is signaling high levels of uncertainty and bad economic times headed into the remainder of 2022 and start of 2023. Yearly CSI experiences a 22% decline from 2021's 77.6 reading. The previous time CSI dipped below 75 the US economy was entering a financial recession.
- Consumers are perceiving an erosion in their living standards as price inflation continues to negatively affect household finances.
- The plummeting consumer sentiment signals to utilities that overall, their customers' perceptions will become more sensitive towards increasing rates, as previous financial buffers have been lost due to inflation.

Consumer Sentiment Index (CSI) by Year



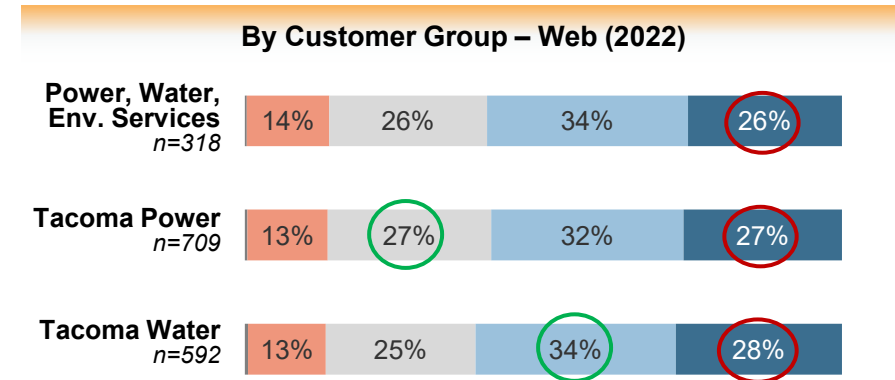
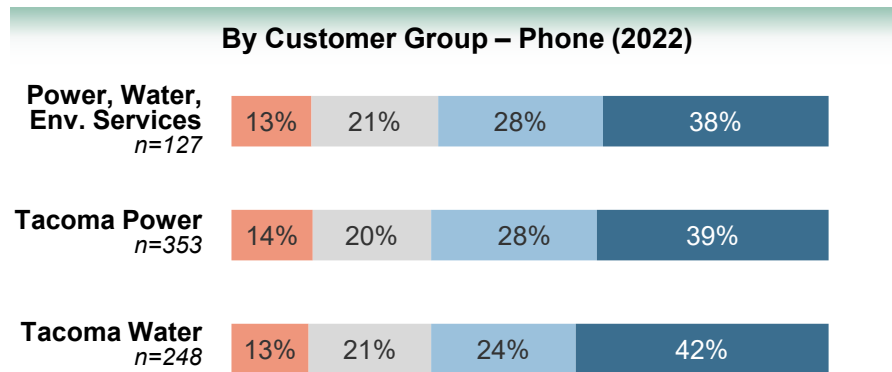
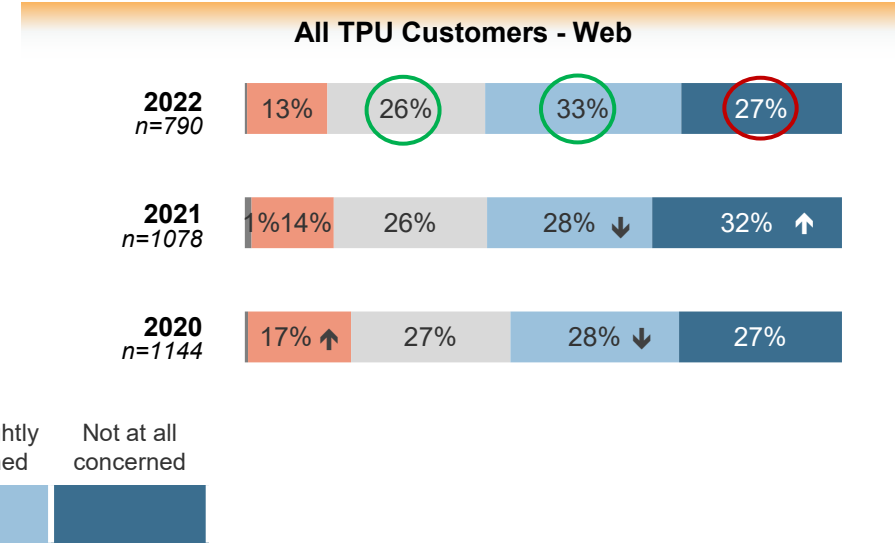
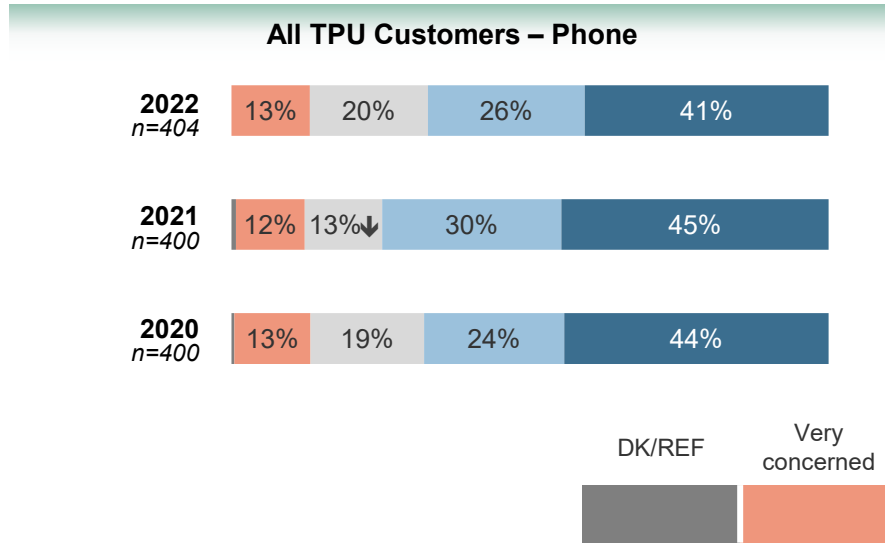
Current Financial situation



ECON1. Do you consider the current financial situation in your household to be better than one year ago, about the same as a year ago, or worse than a year ago?

↑↓ Indicate significant differences between the current wave and previous waves. ● / ○ circles indicate significantly higher/lower percentages for web results versus the 2022 phone results.

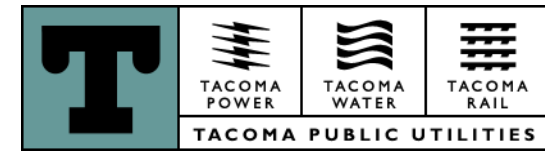
Concerned about Paying Utility Bills



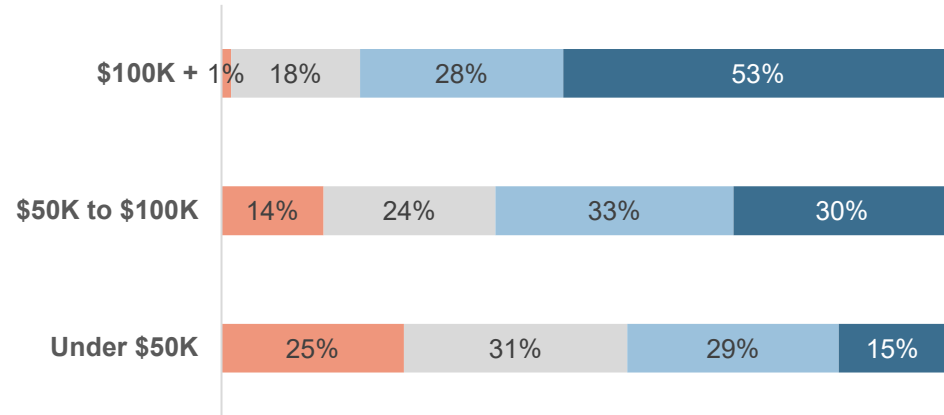
COV2. How concerned would you say you are about paying basic household bills like your utility bills this year?

↑↓ Indicate significant differences between the current wave and previous waves. ● / ○ circles indicate significantly higher/lower percentages for web results versus the 2022 phone results.

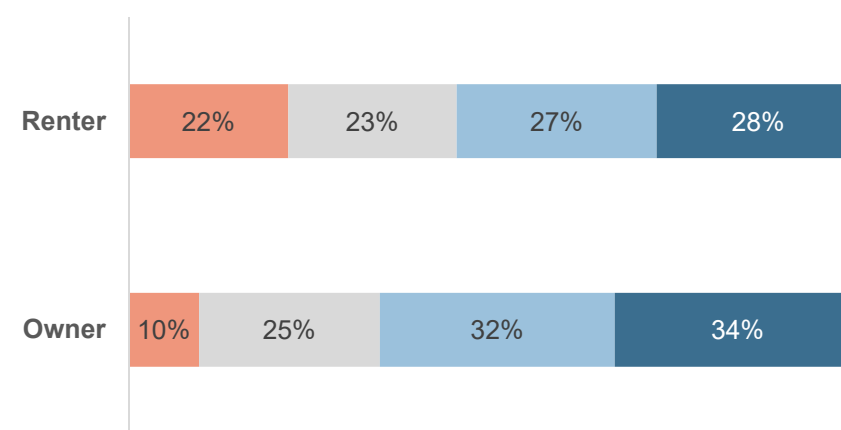
Concerned about Paying Utility Bills



Annual Household Income

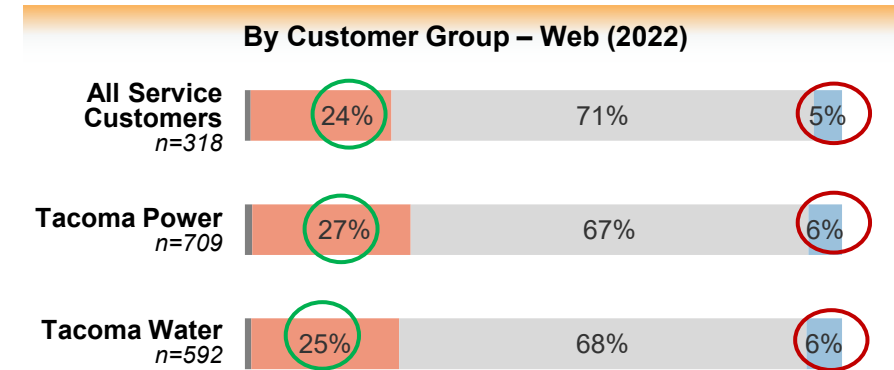
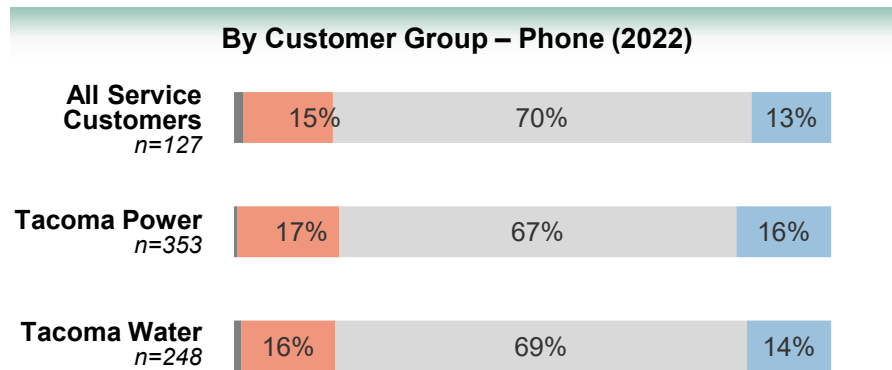
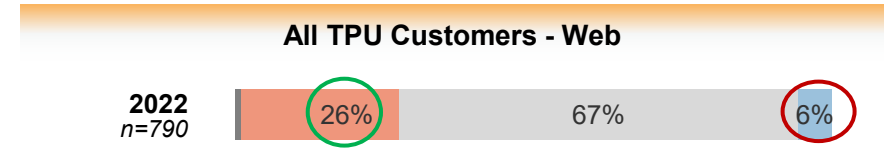
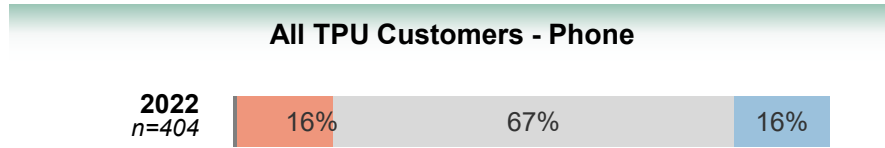


Rent/Own



COV2. How concerned would you say you are about paying basic household bills like your utility bills this year?

Impact of Current Economy



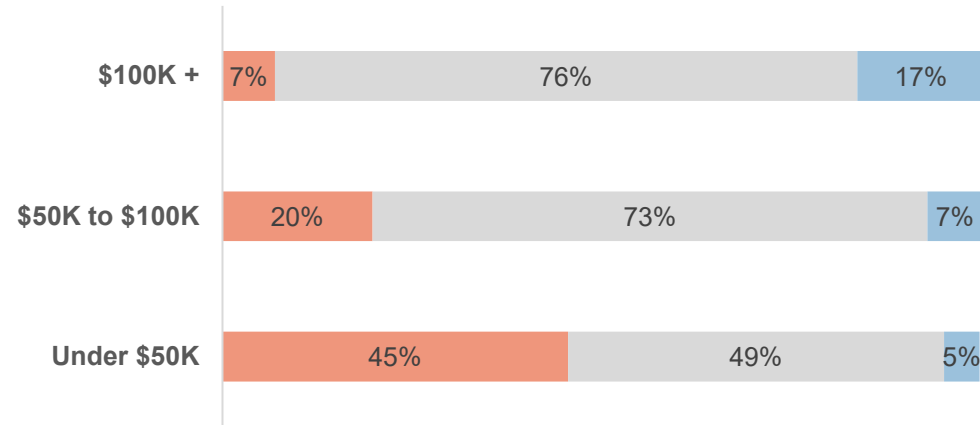
ECON3. How has the current economy (e.g., higher prices) impacted you and/or your family?

↑↓ Indicate significant differences between the current wave and previous waves.

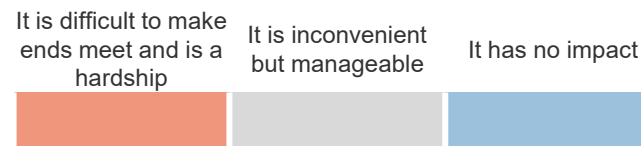
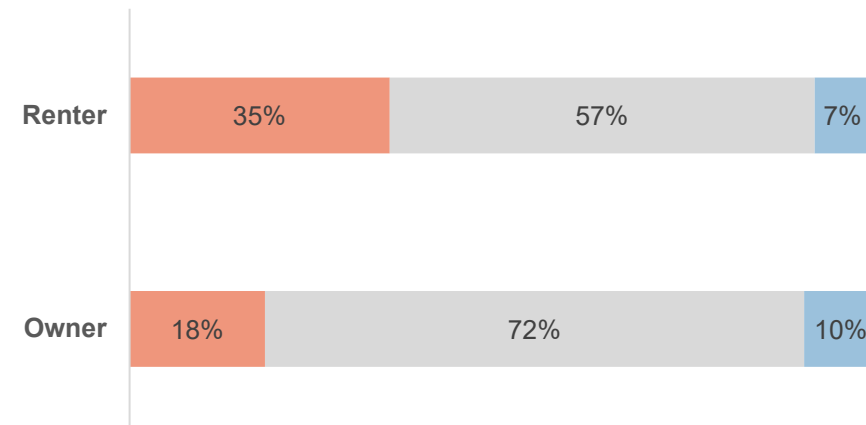
○ / ○ circles indicate significantly higher/lower percentages for web results versus the 2022 phone results.

Impact of Current Economy

Annual Household Income



Rent/Own



Benchmarking

Escalent National Energy Utility Benchmarking Residential Electric and Electric-Gas Utility Customers



NOTE: TPU results exclude Water-only customers.

	Mean Benchmarking						Number of Utilities
	Phone			Web			
	Mean	Rank	Quartile	Mean	Rank	Quartile	
Having Friendly And Courteous Employees	8.8	1	1	8.2	7	1	92
Providing Reliable Service	9.0	3	1	8.5	14	1	100
Promptly Fixing Customer Problems	8.4	1	1	7.9	11	1	90
Being a Good Corporate Citizen in the Communities Served	8.1	1	1	7.6	11	1	93
Having Knowledgeable And Well-Trained Employees	8.6	3	1	8.1	11	1	94
Restoring Electric Service When Outages Occur	8.6	4	1	8.2	12	1	100
Accessible By Phone During Outage	8.1	1	1	7.6	8	1	87
Being Easy To Do Business With	8.5	4	1	7.9	23	1	99
Being A Company You Can Trust	8.3	3	1	7.7	20	1	100
Providing Accurate Bills	8.7	7	1	7.9	33	2	100
Helping Customers Use Energy Safely	8.2	3	1	7.8	11	1	91
Having Bills That Are Easy To Understand	8.5	9	1	8.0	21	1	100
Being Well-Managed	8.0	2	1	7.5	31	2	97
Letting You Know What Caused Outage	7.5	8	1	7.0	23	2	89
Overall Satisfaction	8.4	6	1	8.1	22	1	100
Overall Favorability	8.1	16	1	7.9	37	2	99
Programs to Help Customers Use Energy More Efficiently	7.6	17	1	7.3	35	2	94
Value of Electric Product Delivered	8.2	11	1	7.8	52	3	98
Reasonableness of Electric Rates	6.7	32	2	6.2	68	3	100