

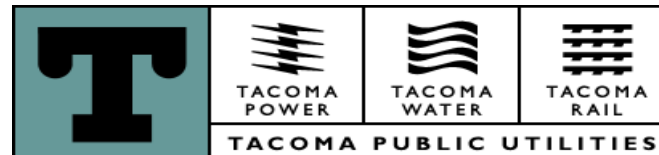
*Serving our customers*



# Residential Customer Satisfaction Survey

## Fall 2020

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



# Research Objectives

Tacoma Public Utilities established their annual Customer Satisfaction tracking research program in 2014 among Residential customers in order to:

- Develop a method for assessing customer satisfaction and customer evaluations of the performance of the organization to determine priorities for actions and investments in operations, training, communications, and product and service offerings.
- Provide actionable guidance to help the organization plan programs and initiatives that will be effective in strengthening customer relationships.
- Give TPU employees easy access to specific, direct feedback that can be used to identify customer preferences and concerns, plan responses, and monitor performance and progress over time.

# Methodology

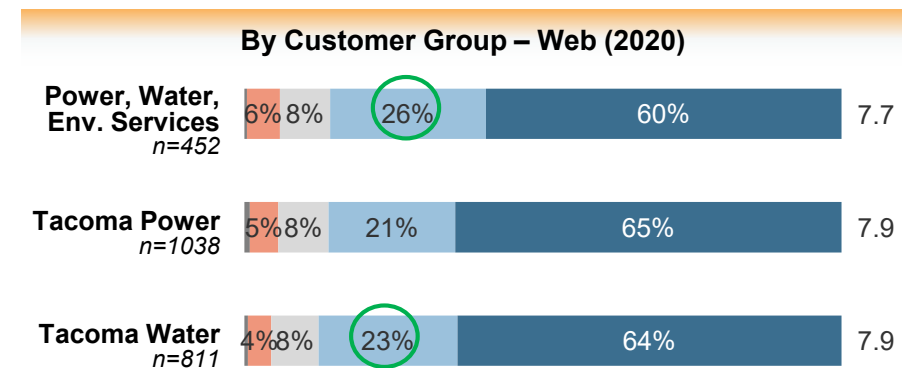
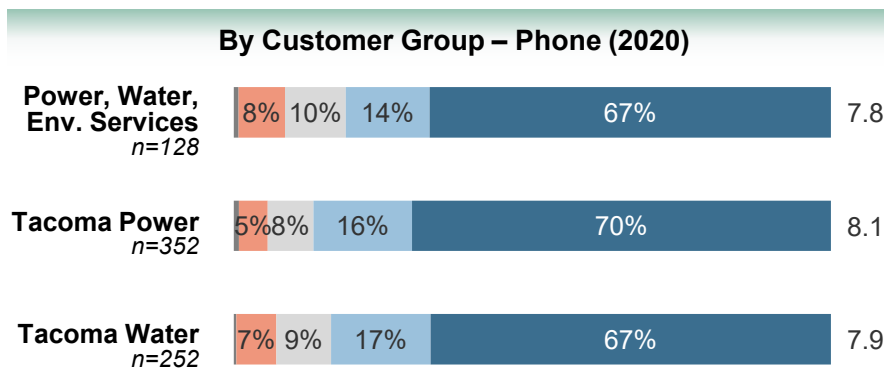
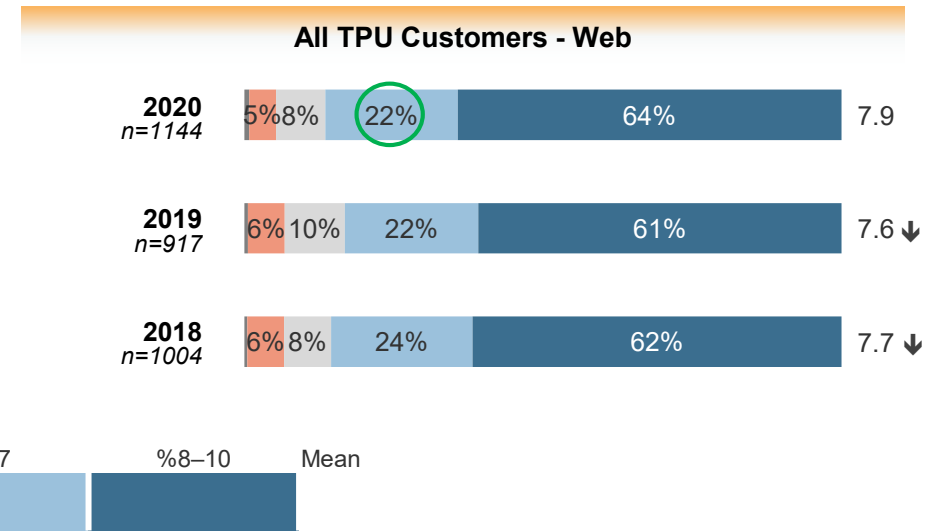
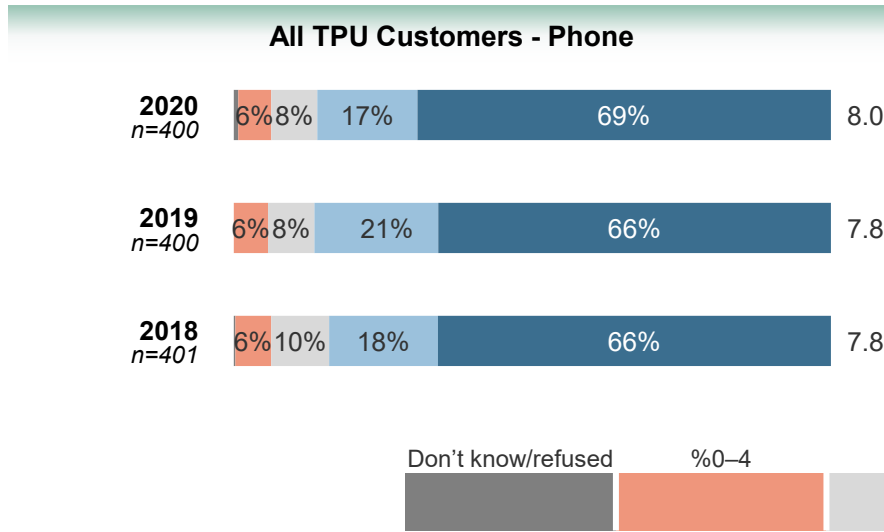
- As in 2018 and 2019, data was collected via both telephone interviews and self-administered web surveys among Tacoma Public Utilities’ Residential customers in 2020. Both the phone and web surveys were conducted from July 20<sup>th</sup> to August 20<sup>th</sup>, 2020. Customer lists provided by Tacoma Public Utilities were used for both the phone and web surveys.
- A total of 400 telephone interviews and 1,144 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	128	452	365
Power only single-family	89	252	257
Power only multi-family	101	240	288
Water only	48	106	137
Power and Water only	34	94	97

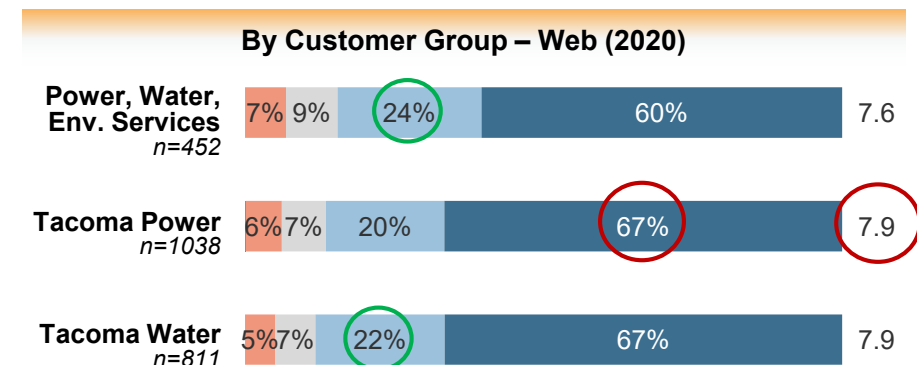
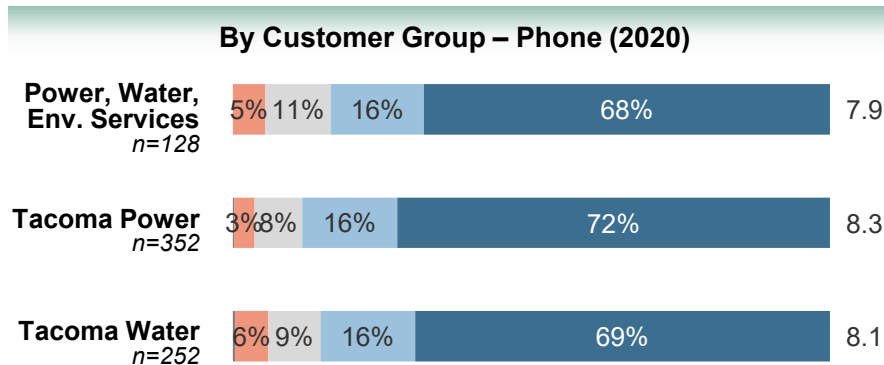
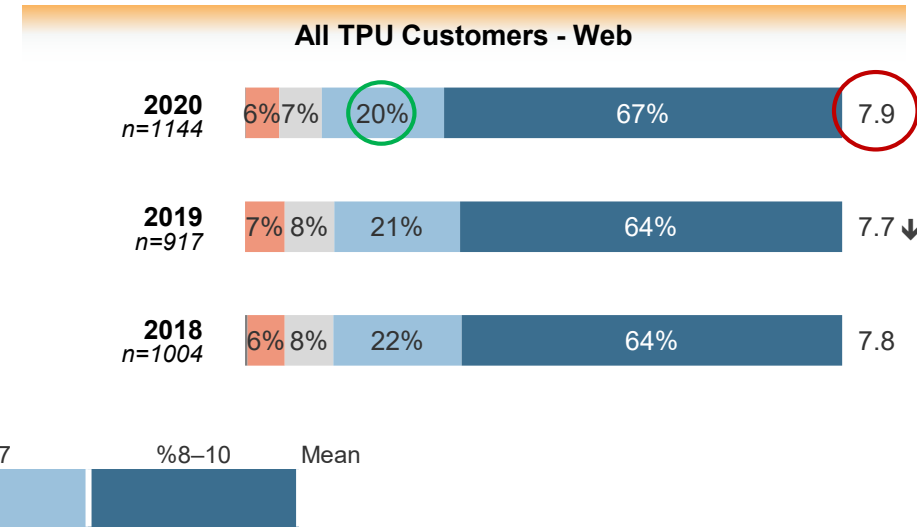
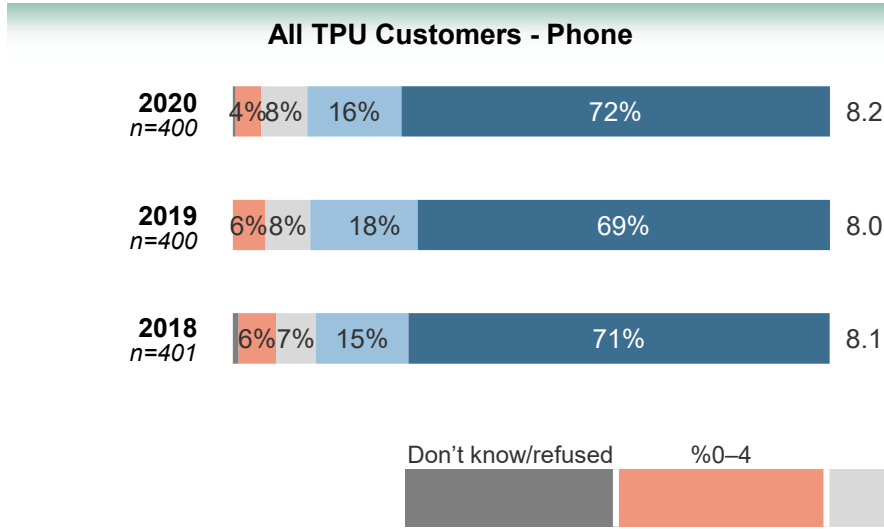
- In proportion to the primary contact phone number type (landline or mobile) provided to TPU by Residential customers, 27.5% of phone respondents were contacted via their landline phone, and 72.5% were contacted via their mobile phone.
- Tacoma Public Utilities was identified as the study sponsor.
- 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 400 telephone interviews is +/-4.9% at the 95% confidence level.
- The sampling error for 1,144 online interviews is +/-2.9% at the 95% confidence level.

# Survey Results

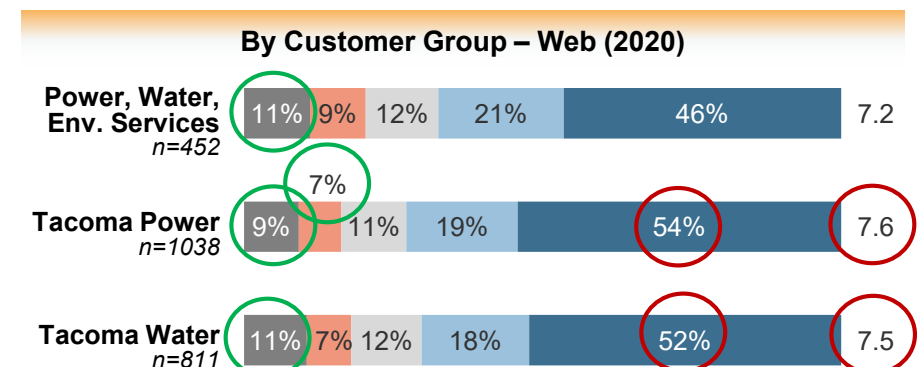
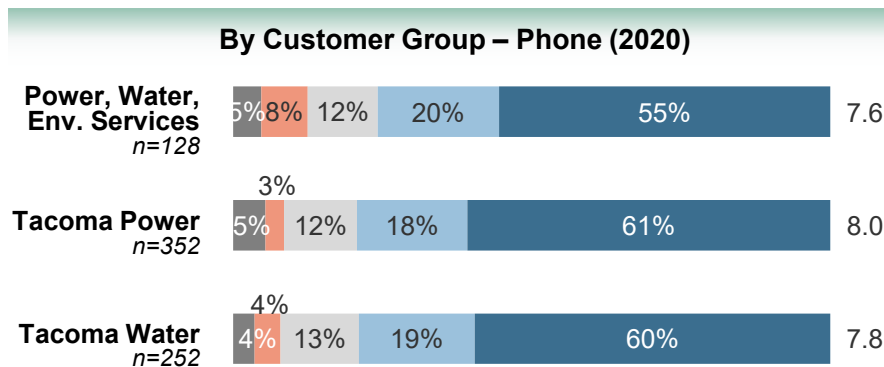
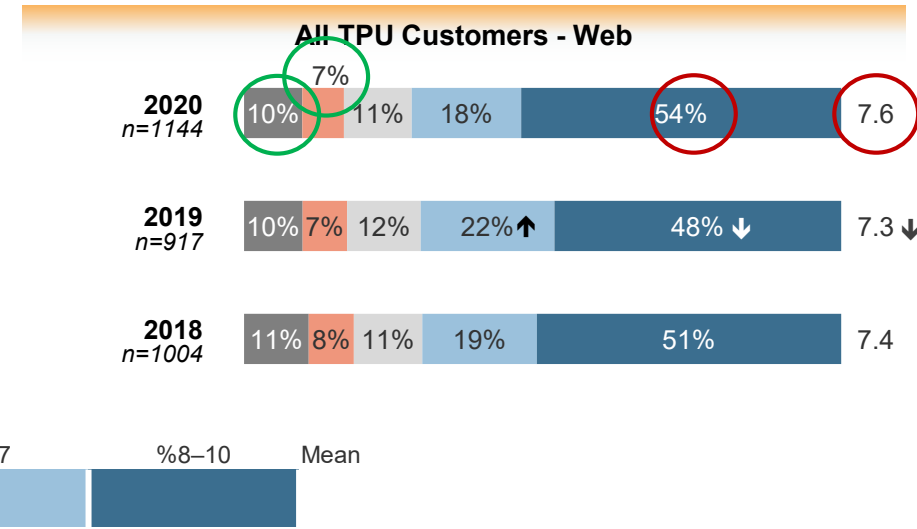
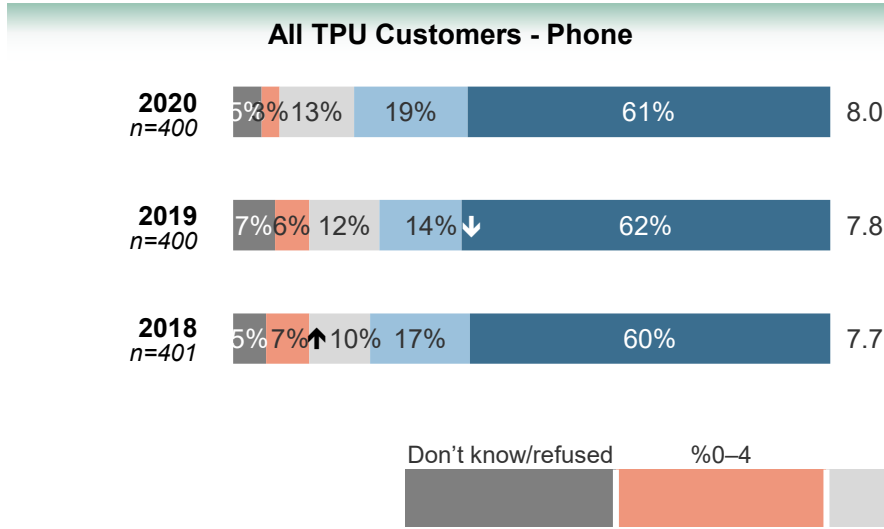
# Overall Favorability: Tacoma Public Utilities



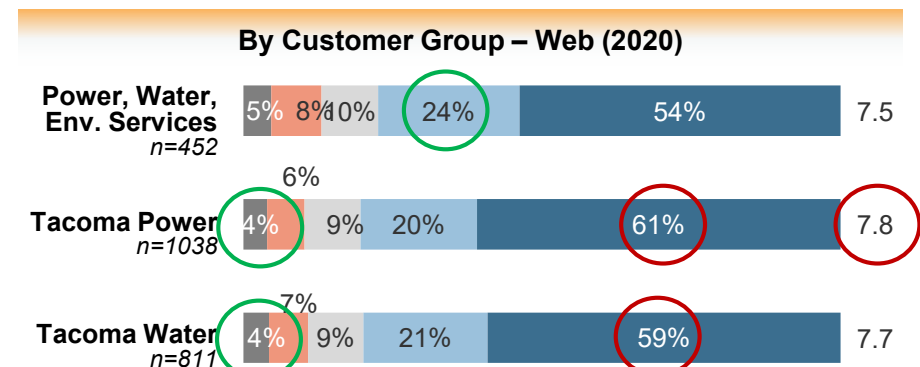
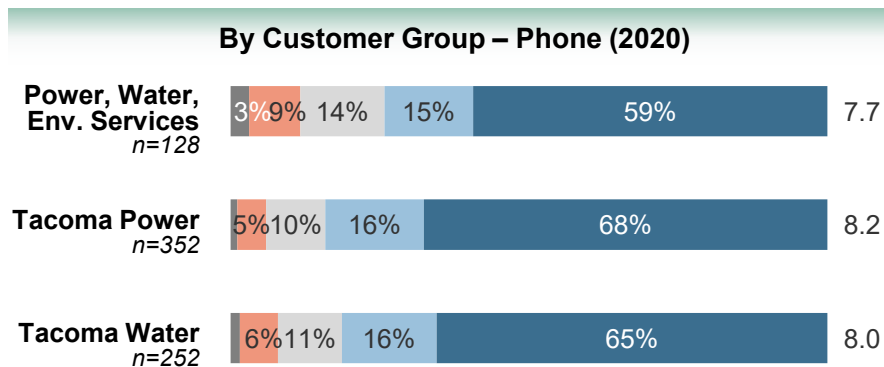
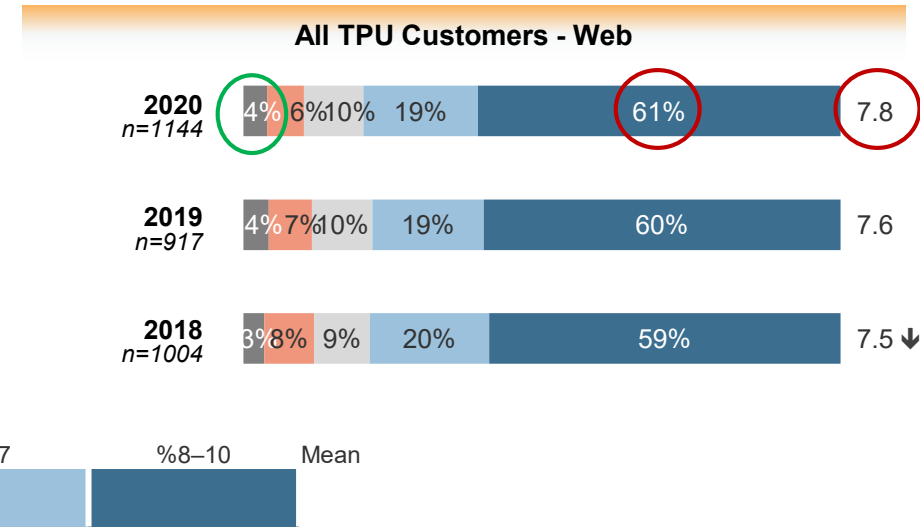
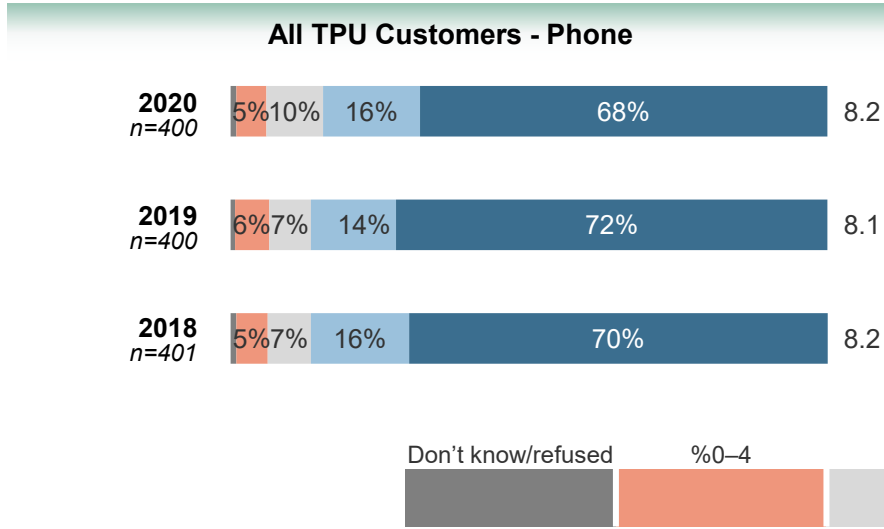
# Overall Satisfaction: Tacoma Public Utilities



# Being Well Managed



# Being an Organization You Can Trust

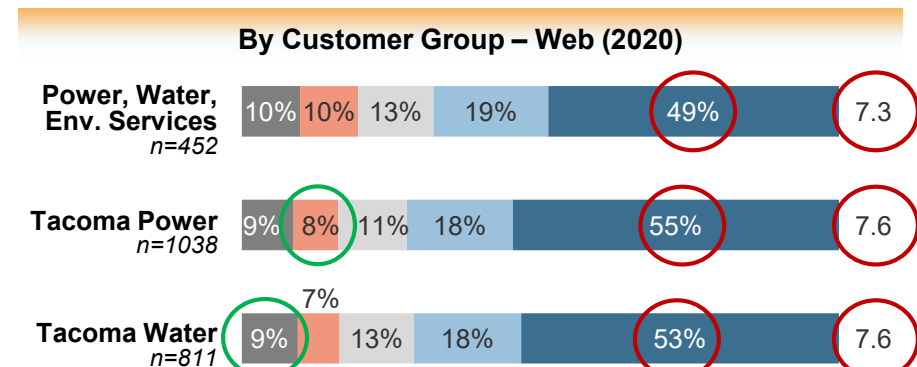
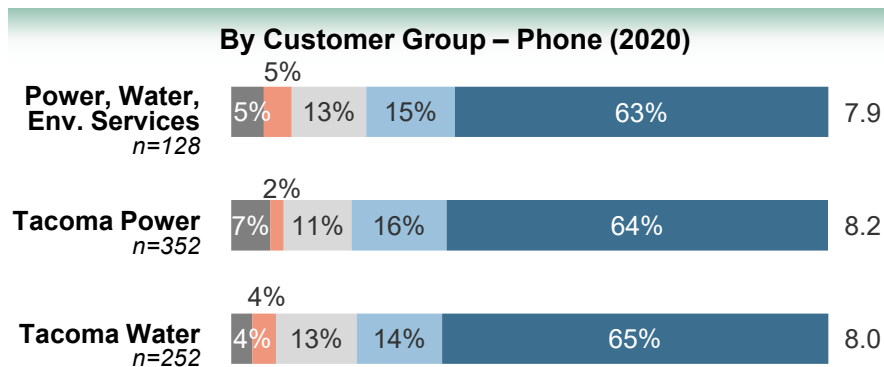
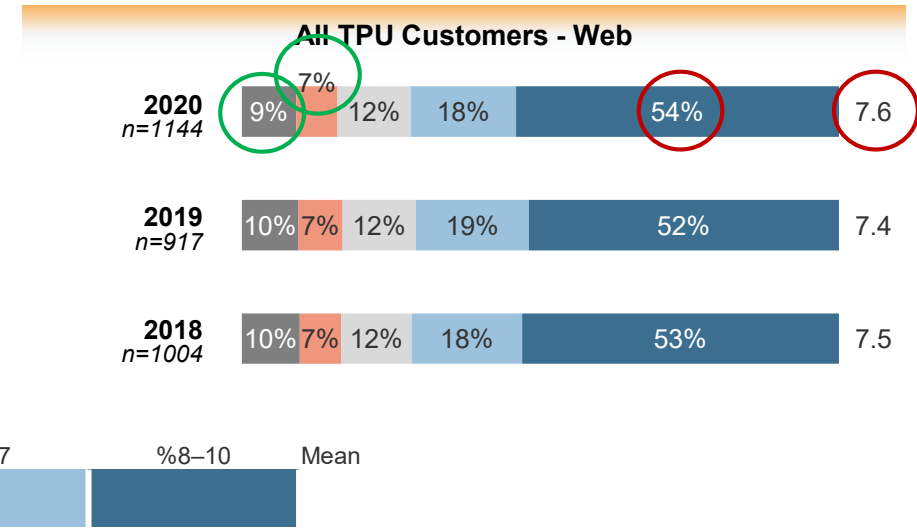
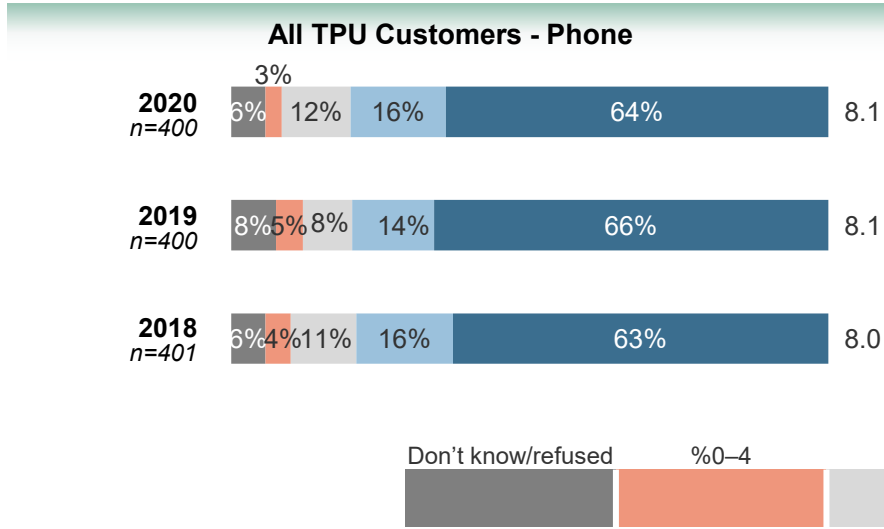


How would you rate T-P-U's performance with regard to...?  
TRUST. Being a company you can trust

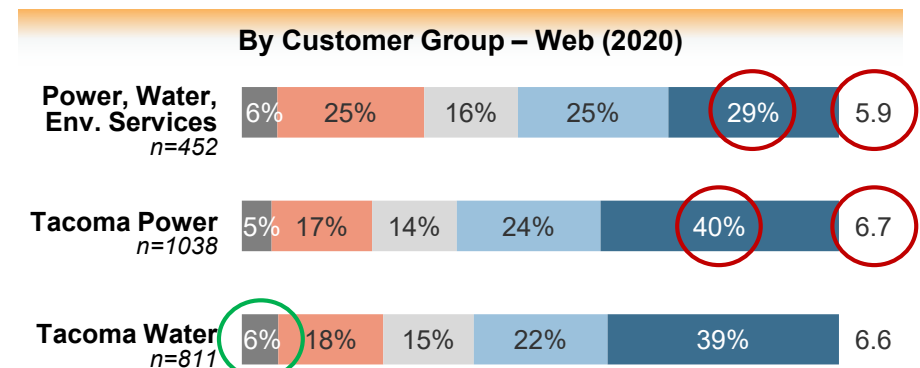
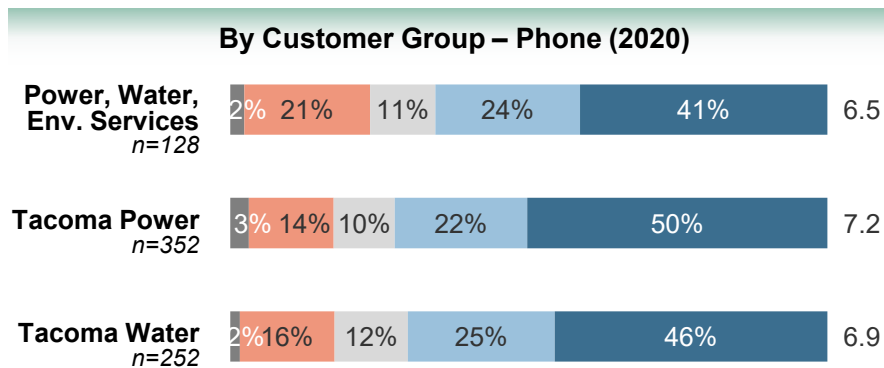
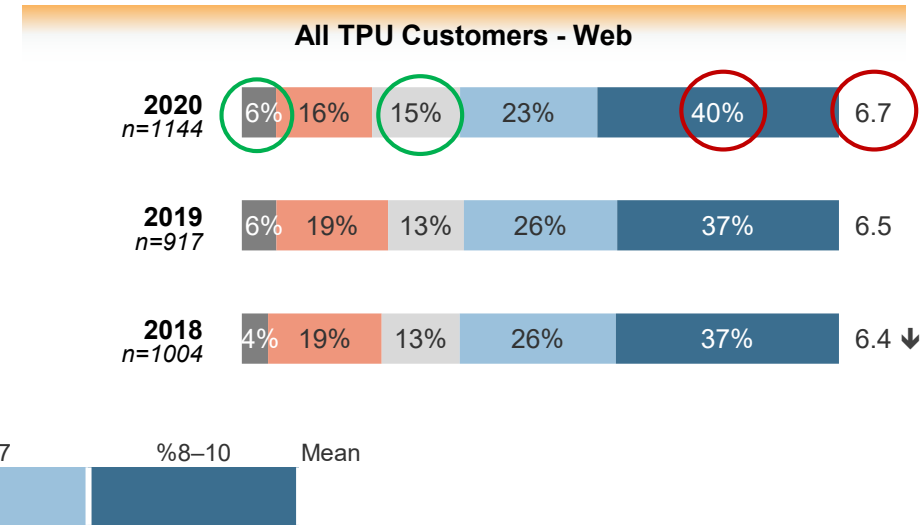
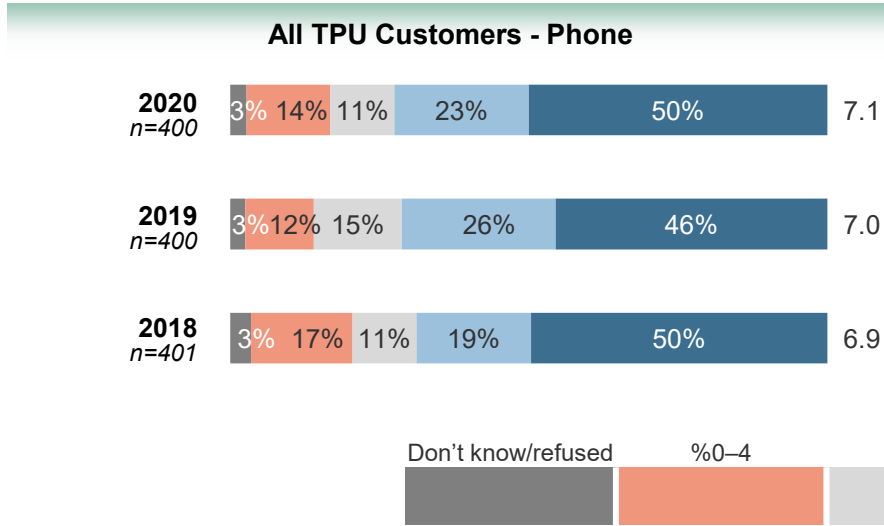
↑↓ Indicate significant differences between the current wave and previous waves. ● / ○ circles indicate significantly higher/lower percentages for web results versus the 2020 phone results.



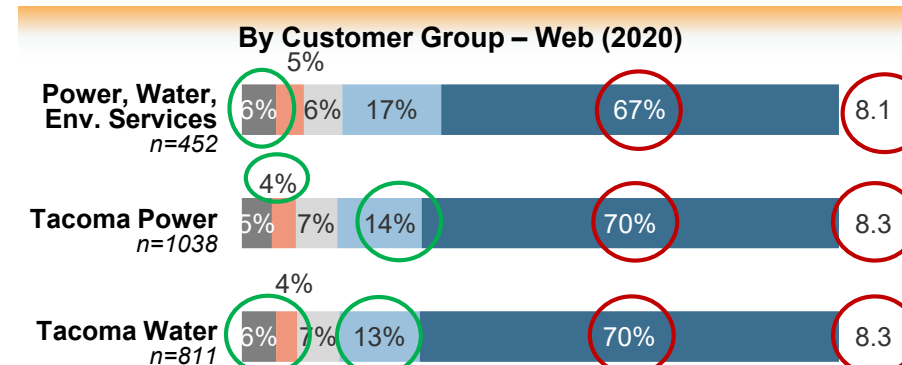
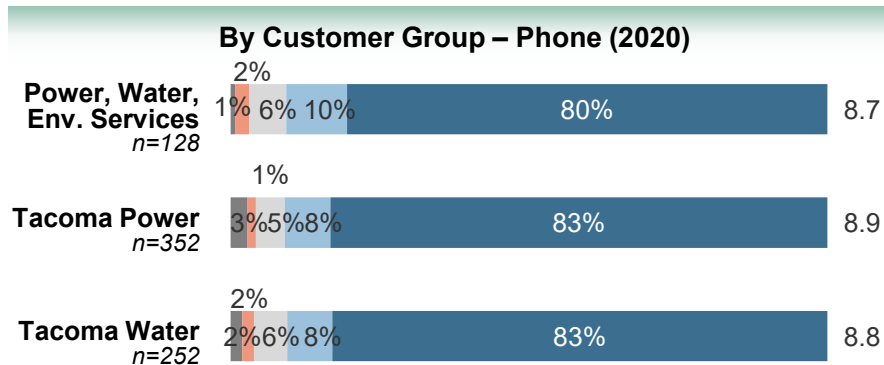
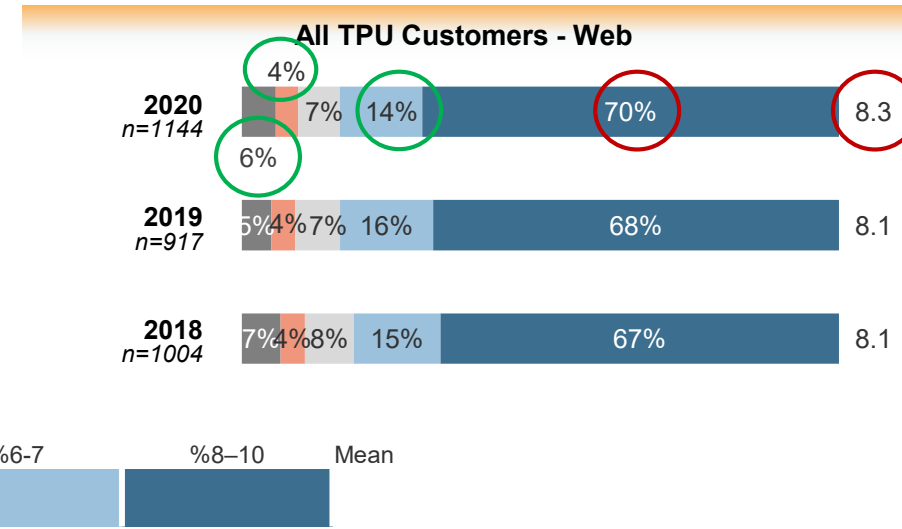
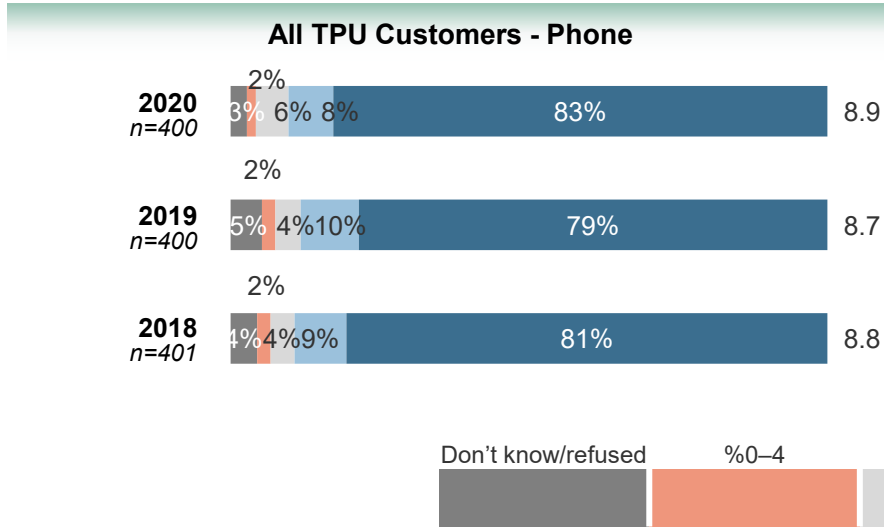
# Being a Good Corporate Citizen



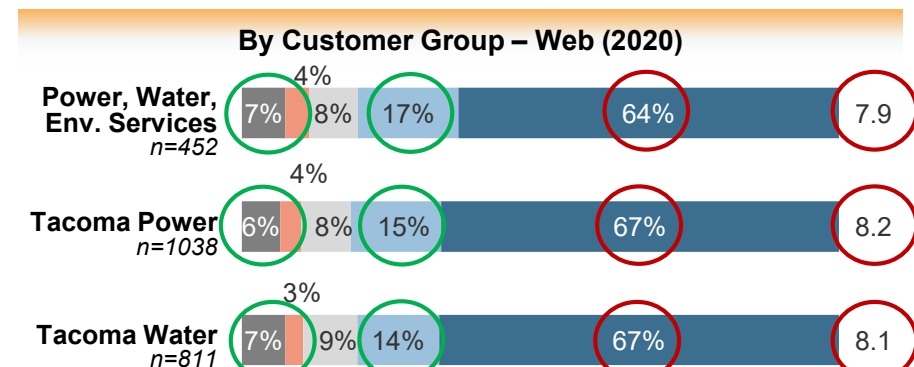
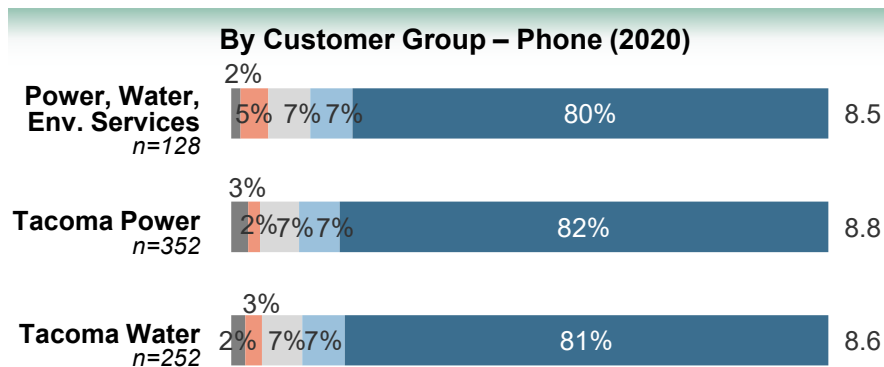
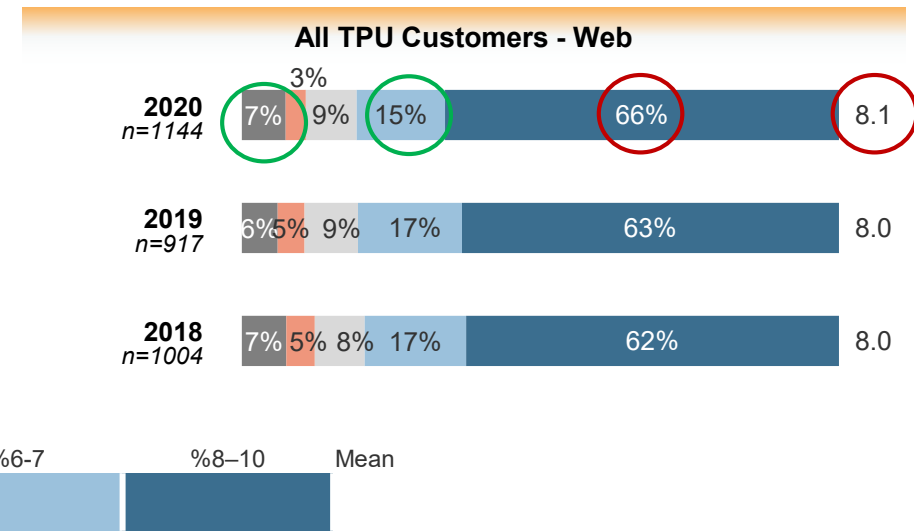
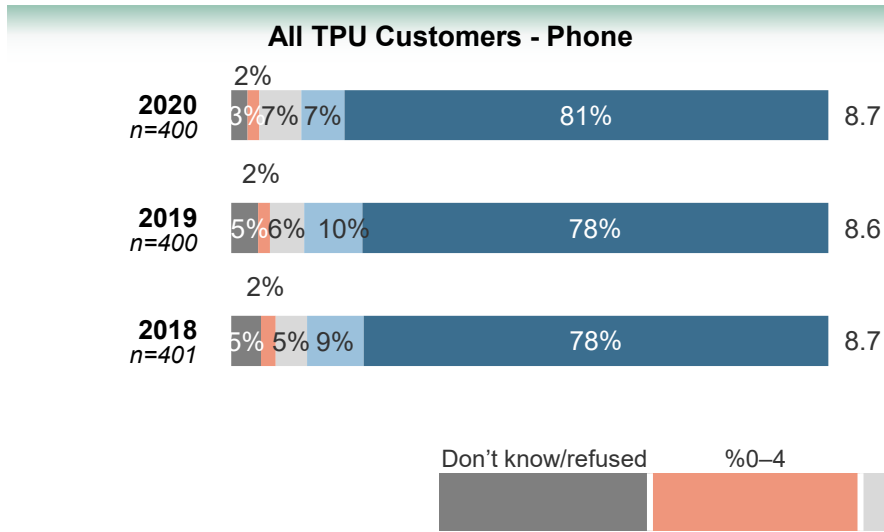
# Controlling Costs



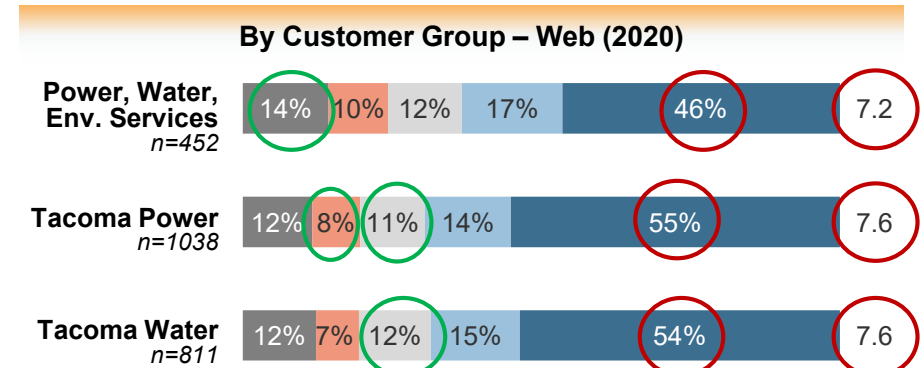
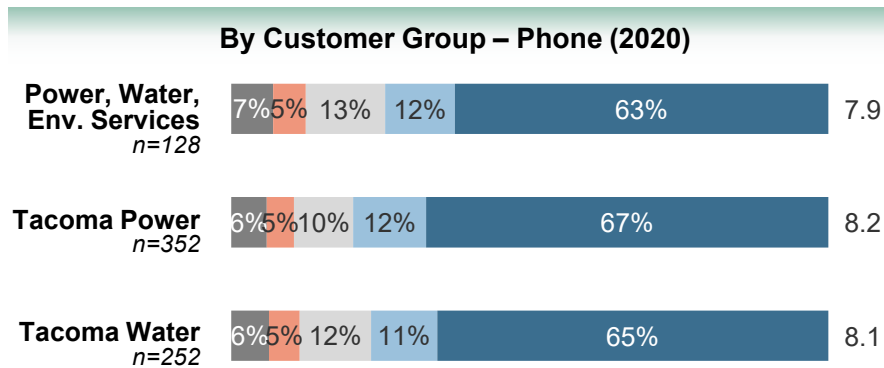
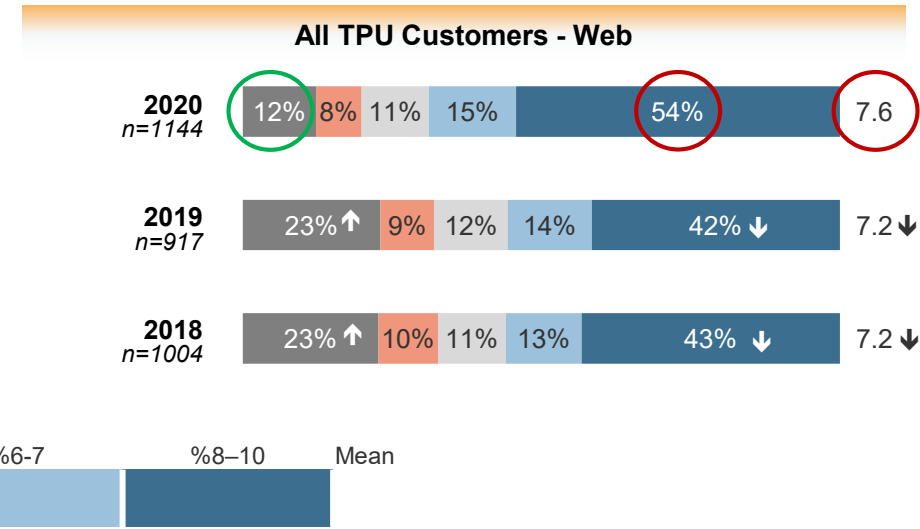
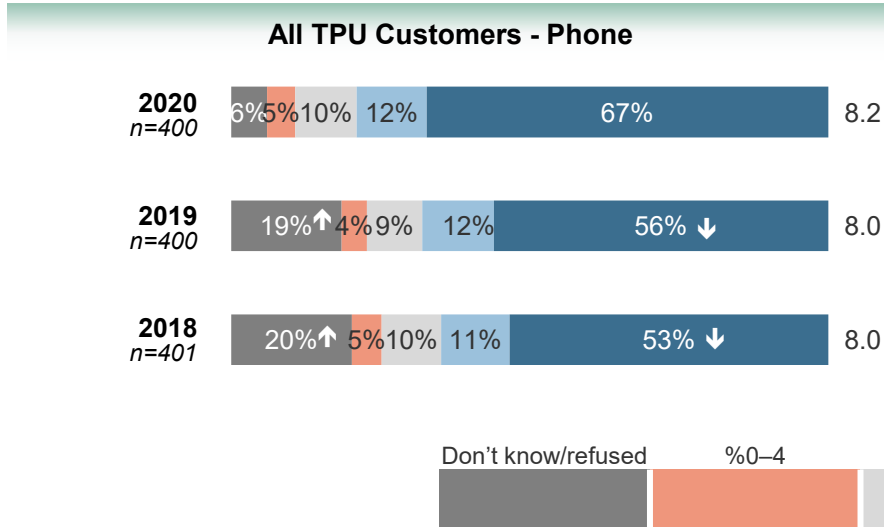
# Having Friendly and Courteous Employees



# Having Knowledgeable and Well-Trained Employees



# Offering Assistance to Customers in Need\*

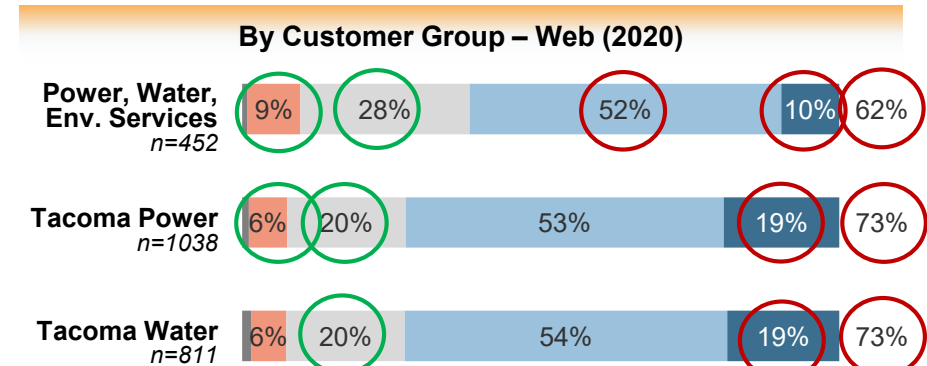
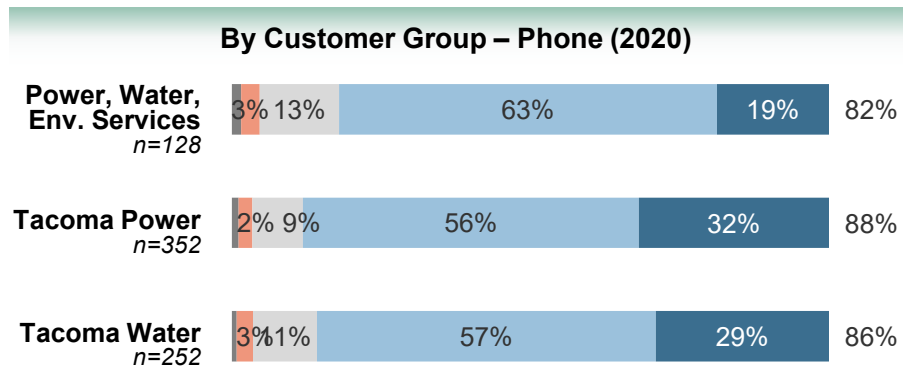
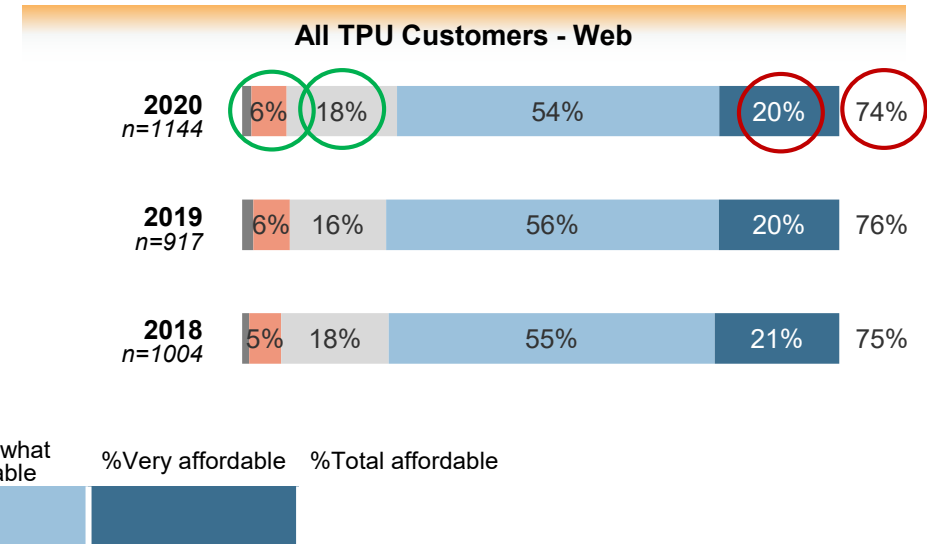
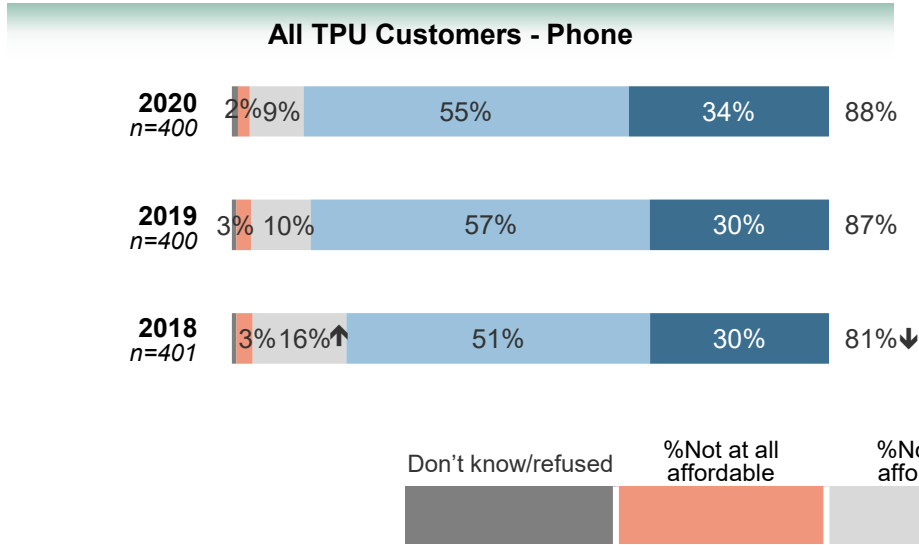


\*In 2020, BILLAST was changed from “Offering assistance to customers who are behind on paying their utility bills” to “Offering assistance to customers in need.”

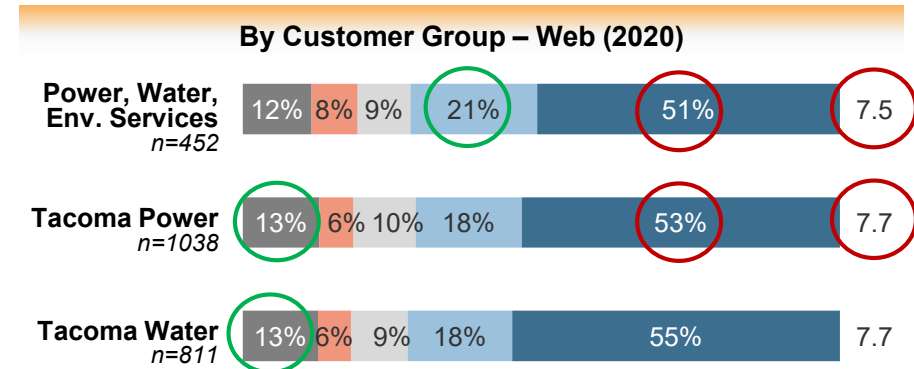
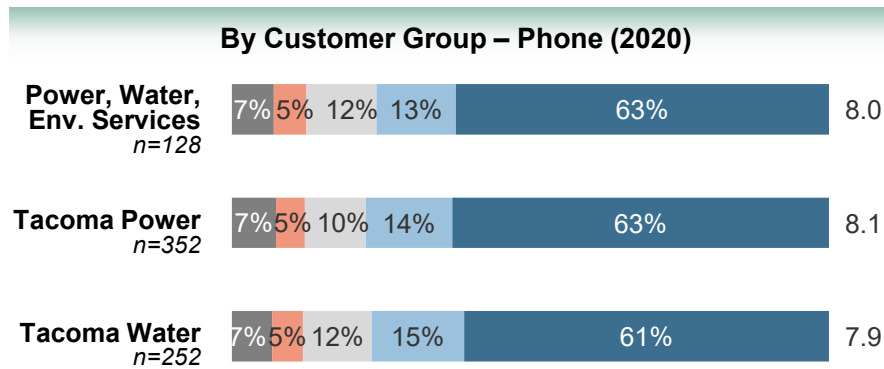
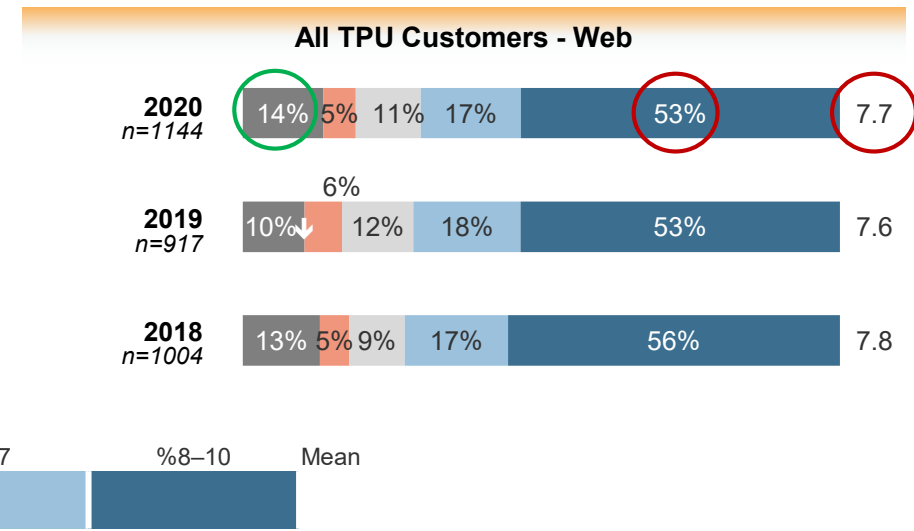
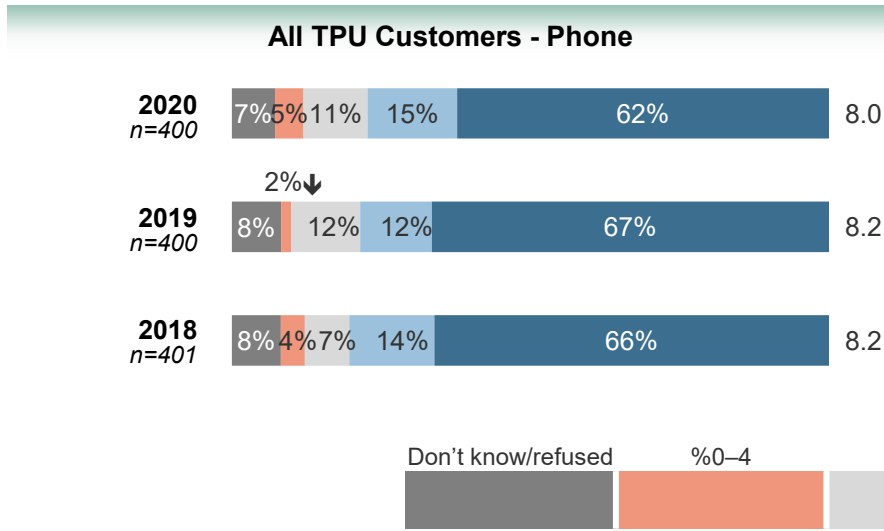
How would you rate T-P-U’s performance with regard to...? BILLAST. Offering assistance to customers in need

↑↓ Indicate significant differences between the current wave and previous waves. ○ / ○ circles indicate significantly higher/lower percentages for web results versus the 2020 phone results.

# Bill Affordability



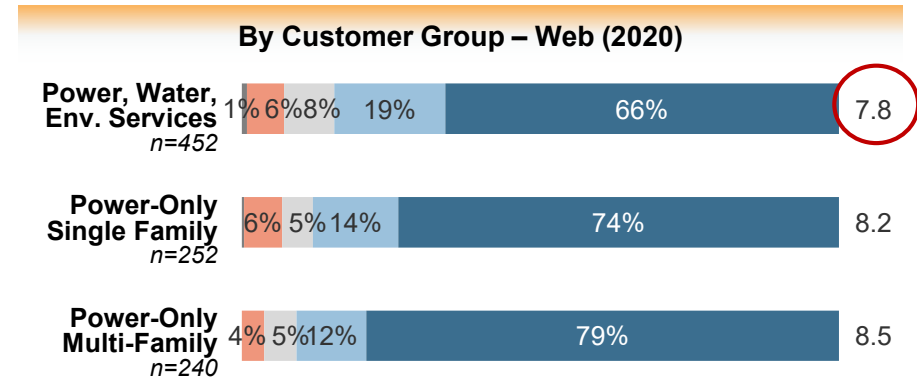
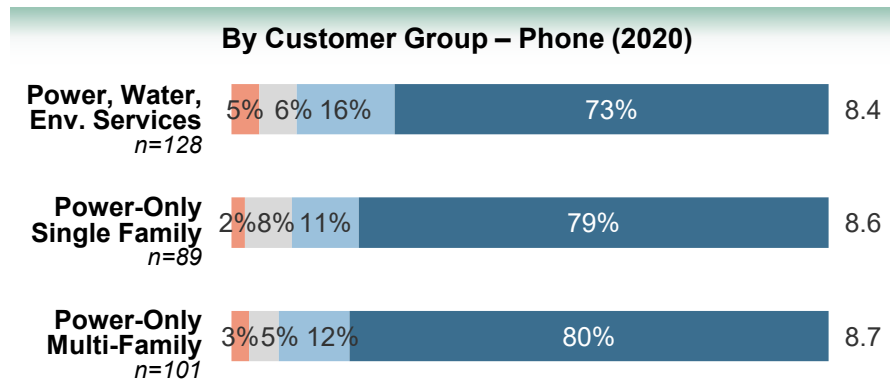
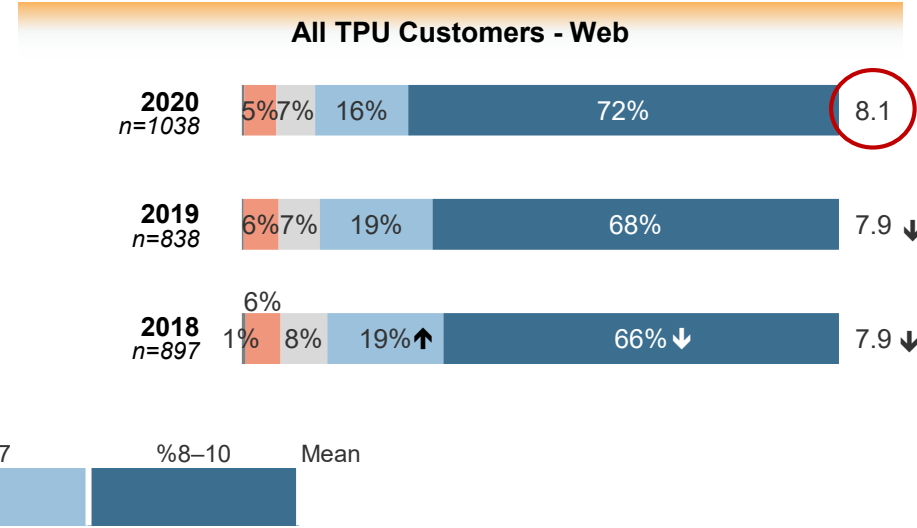
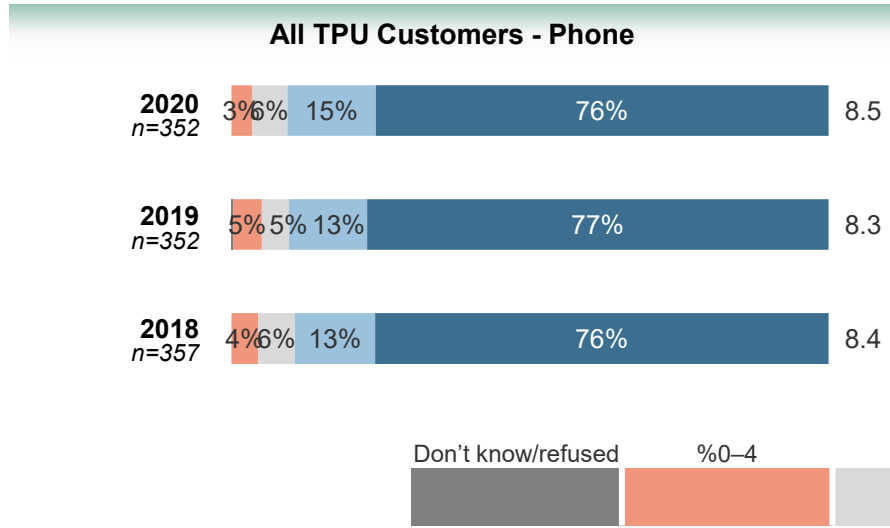
# Being Environmentally Responsible



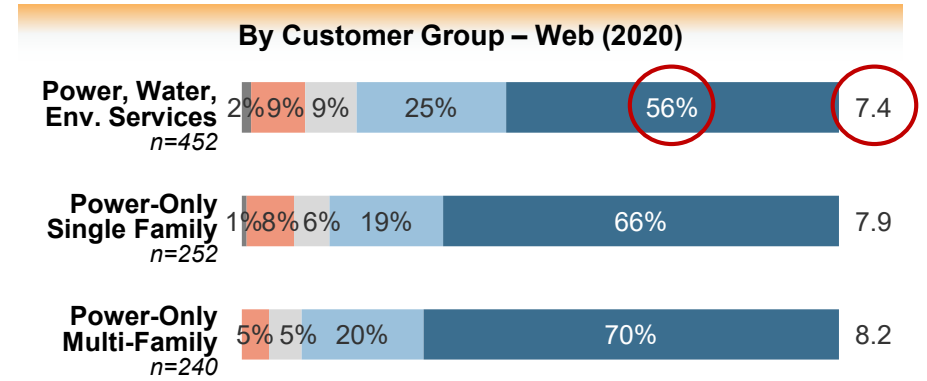
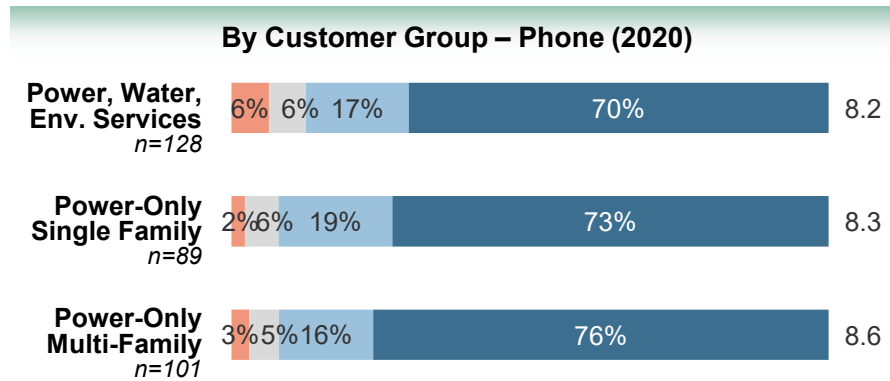
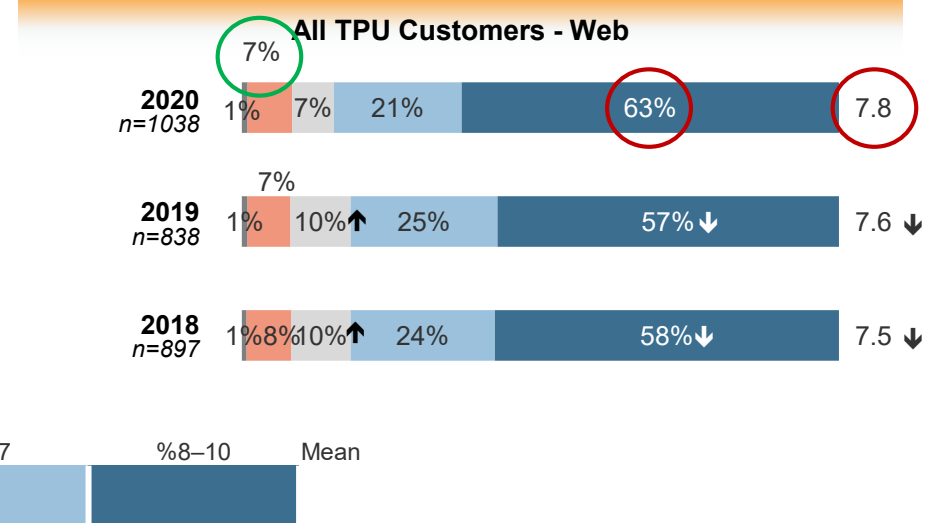
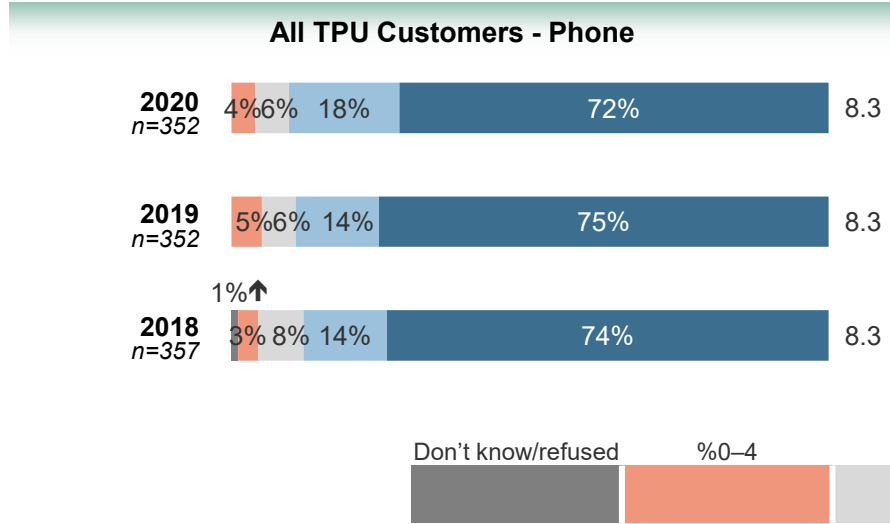
# Electric Service Measures



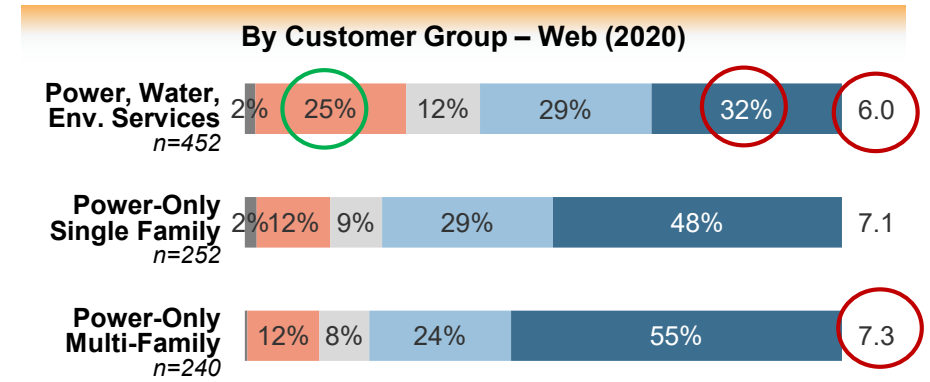
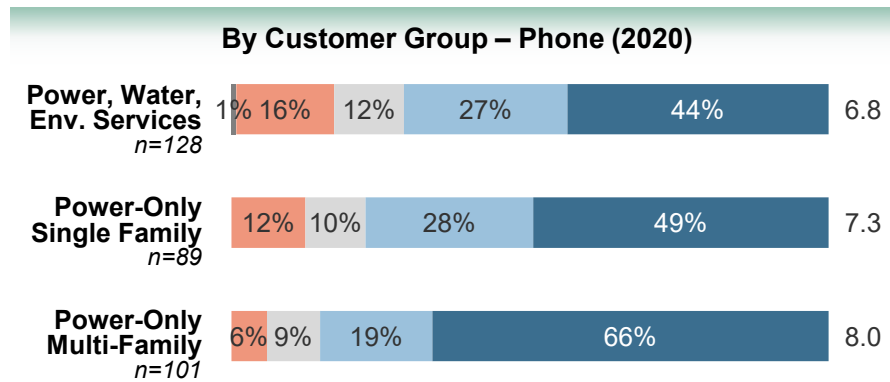
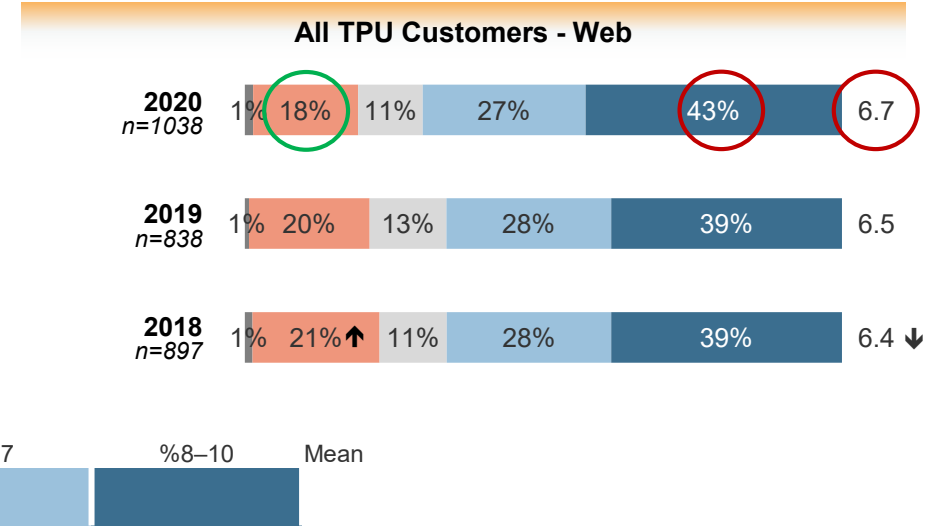
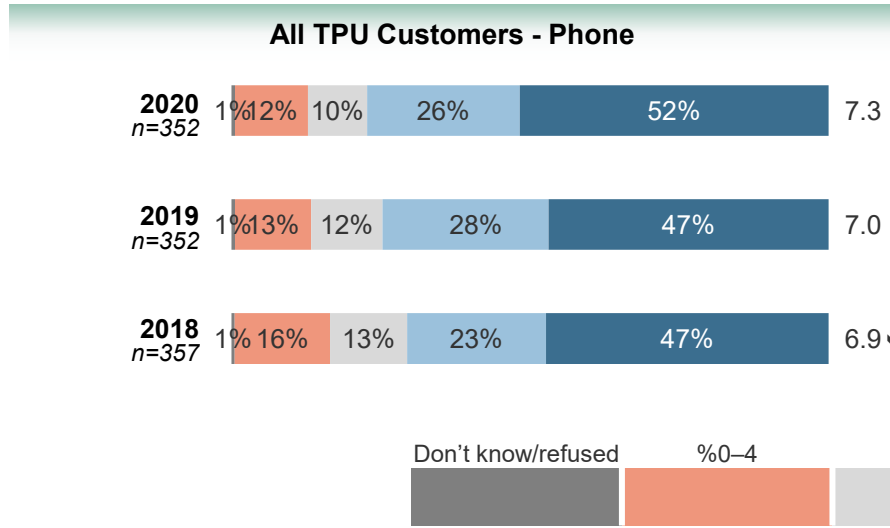
# Overall Satisfaction with Electric Service Provided by Tacoma Power



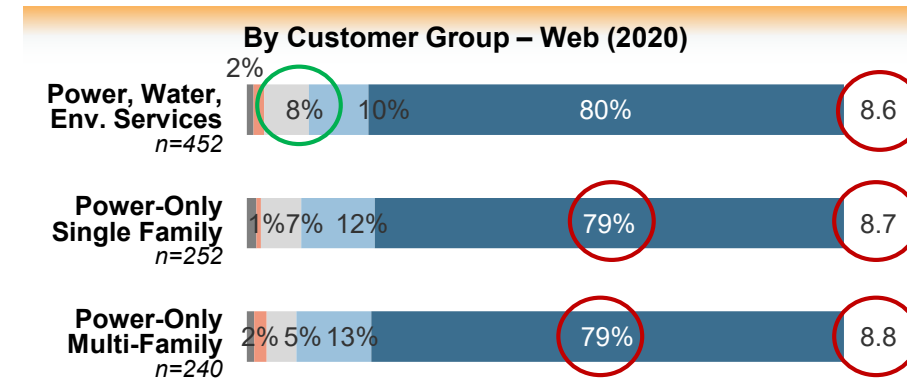
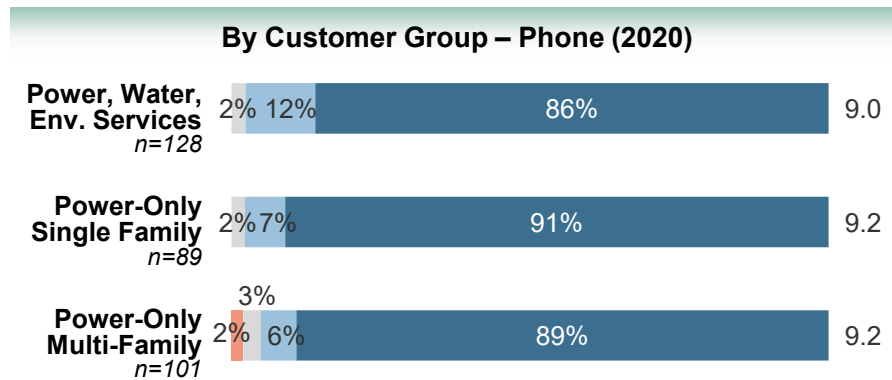
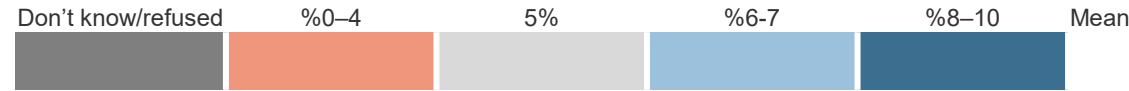
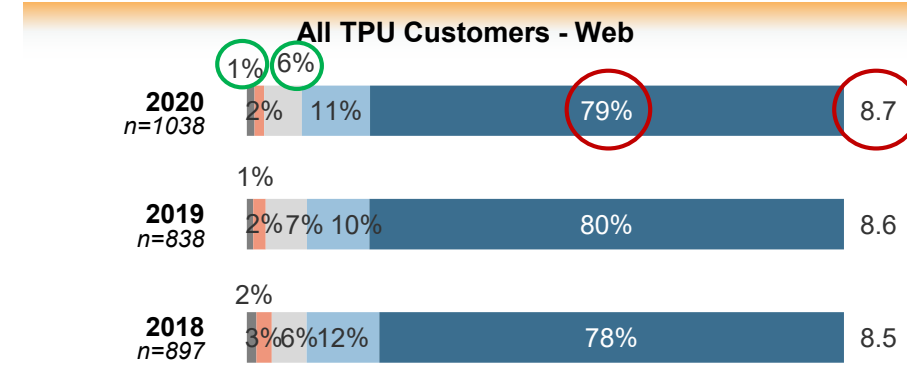
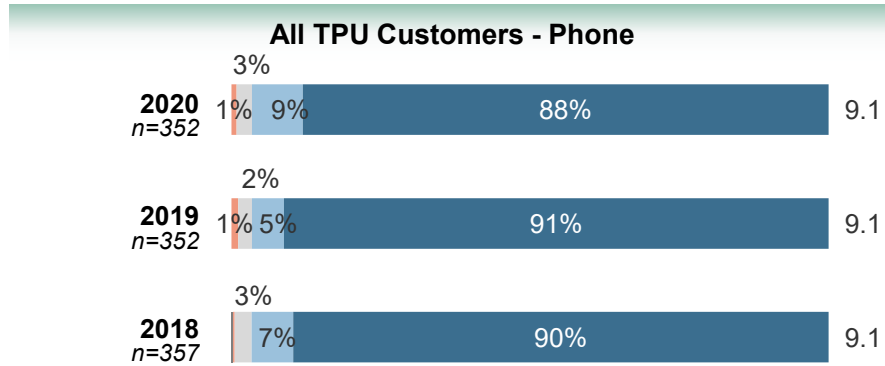
# Value of Electric Service



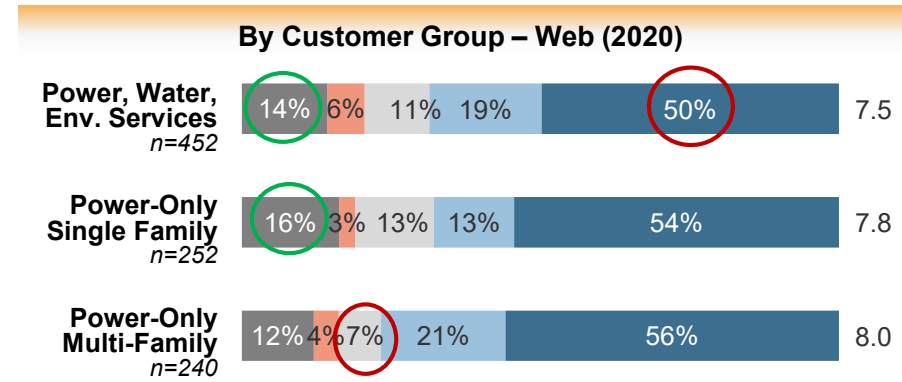
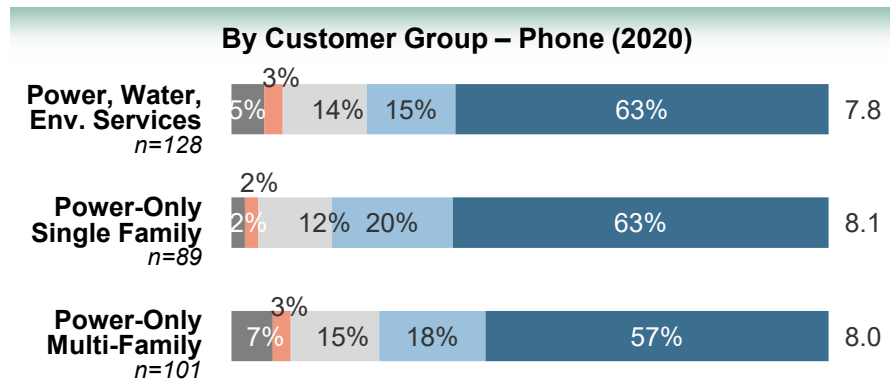
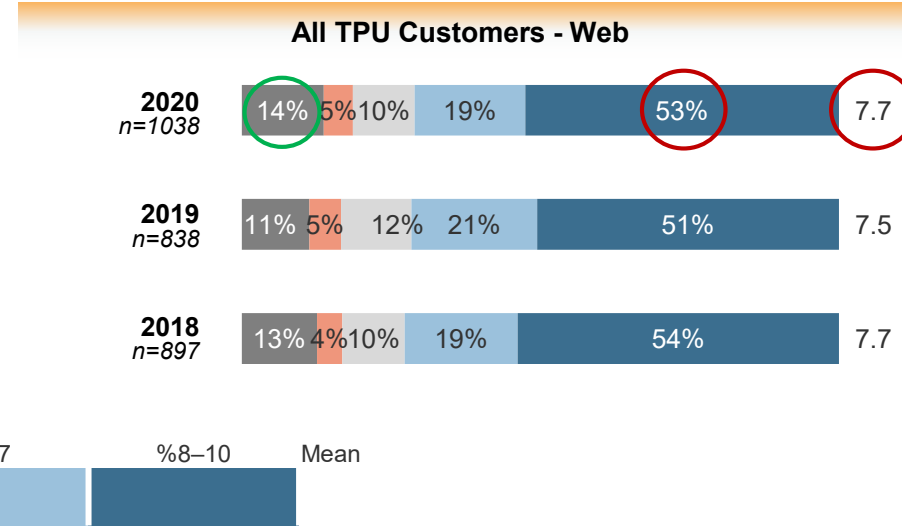
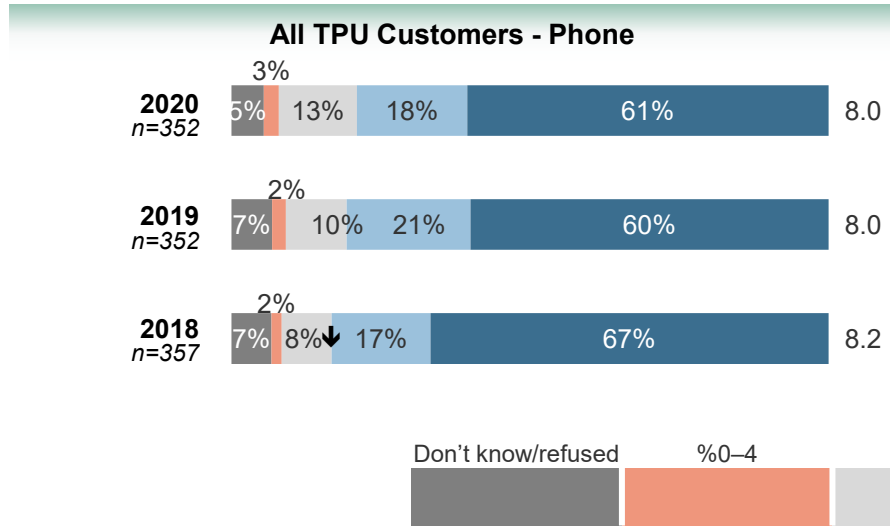
# Reasonableness of Electric Rates



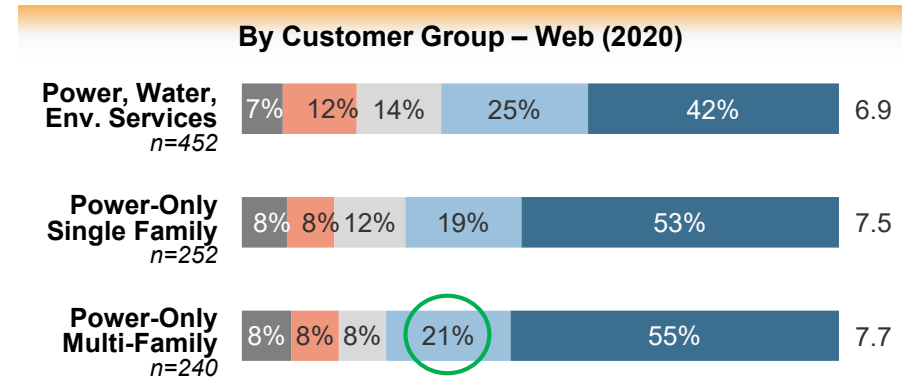
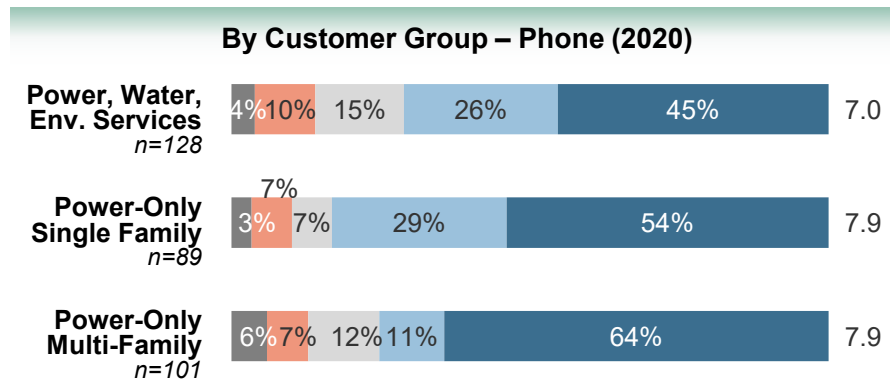
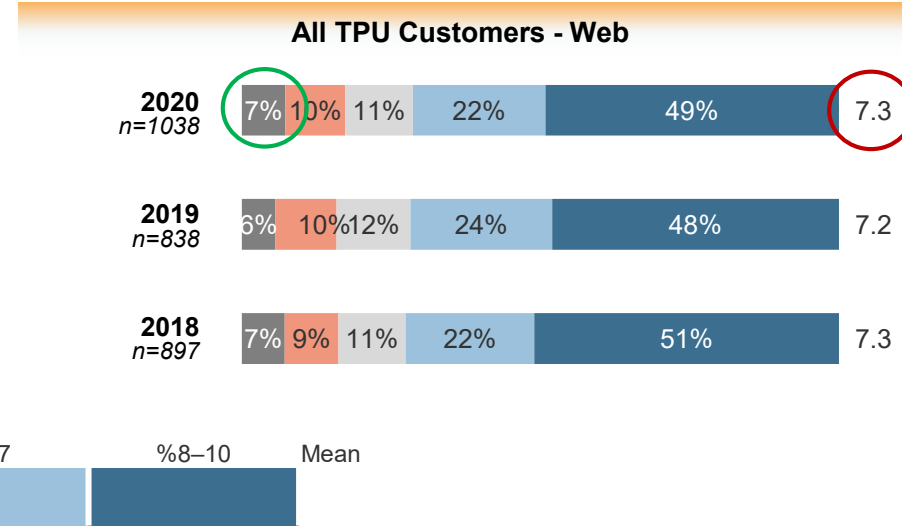
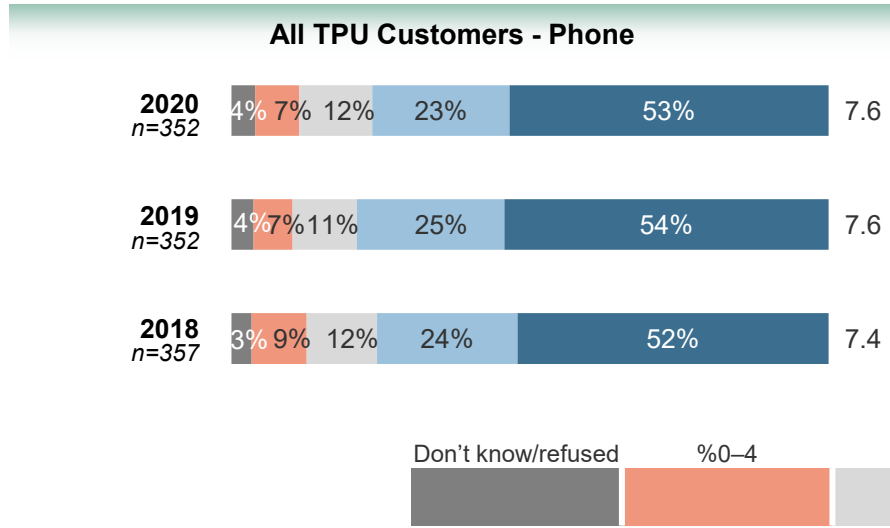
# Providing Reliable Electric Service



# Environmentally Responsible Tacoma Power

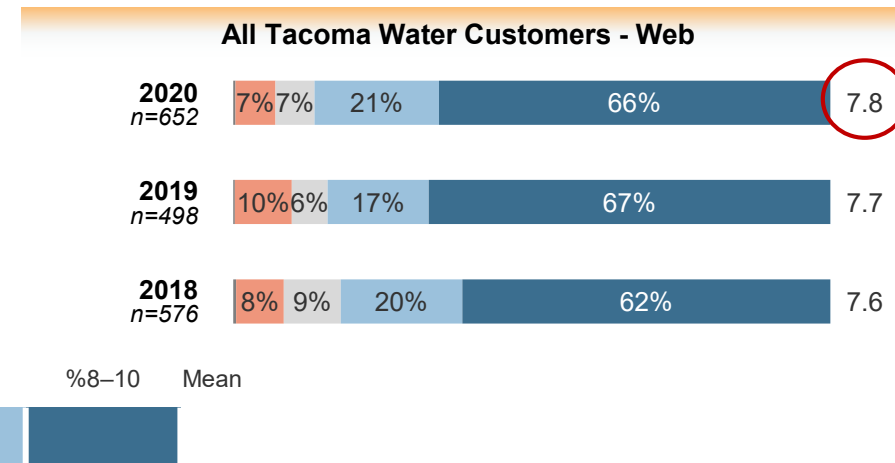
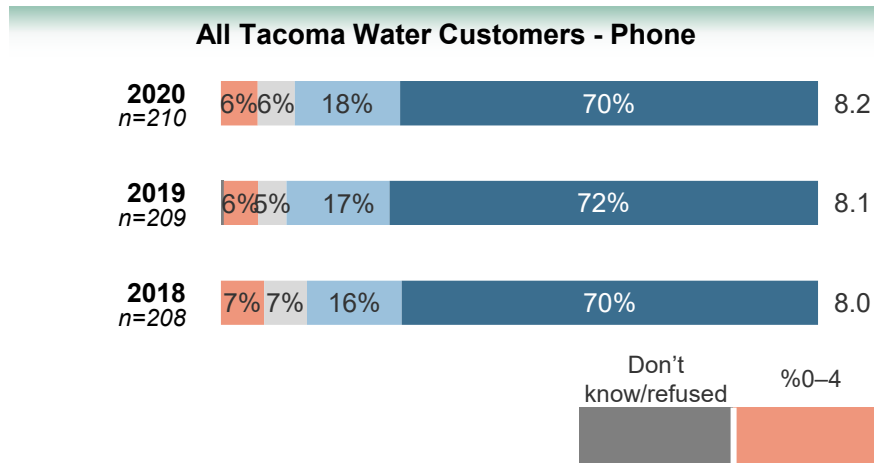


# Offering Programs to Help Customers Use Electricity More Efficiently



# Water Service Measures

# Overall Satisfaction with the Water Service from Tacoma Water



What does Tacoma Water do well to earn your satisfaction?	Phone			Web		
	2018	2019	2020	2018	2019	2020
<i>All power customers</i>	n= 145	150	NA*	353	330	423
Water quality	42%	36%	-	21%	23%	20%
Reliable service	29%	35%	-	19%	21%	19%
Satisfied/no problems	24%	23%	-	14%	9%	13%
Communication	6%	6%	-	4%	8%	7%
Reasonable Rates	12%	5%	-	5%	4%	7%
Customer service	3%	8%	-	6%	10%	6%
Billing/payments	7%	10%	-	5%	5%	5%
Maintenance	3%	3%	-	1%	2%	3%
Other	21%	9%	-	12%	14%	15%

What does Tacoma Water need to improve most to earn your satisfaction?	Phone			Web		
	2018	2019	2020	2018	2019	2020
<i>All power customers</i>	n= 63	58	NA*	220	167	226
Rates	43%	34%	-	37%	40% ↑	29%
Water quality	25%	19%	-	9%	8%	12%
Billing	11%	9%	-	11%	12%	10%
Communication	5%	2%	-	4%	3%	4%
Maintenance	8%	-	-	2%	4%	2%
Water pressure	5%	3%	-	2%	3%	2%
Other	13%	16%	-	11%	9%	10%

\*Not asked of phone respondents in 2020.

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

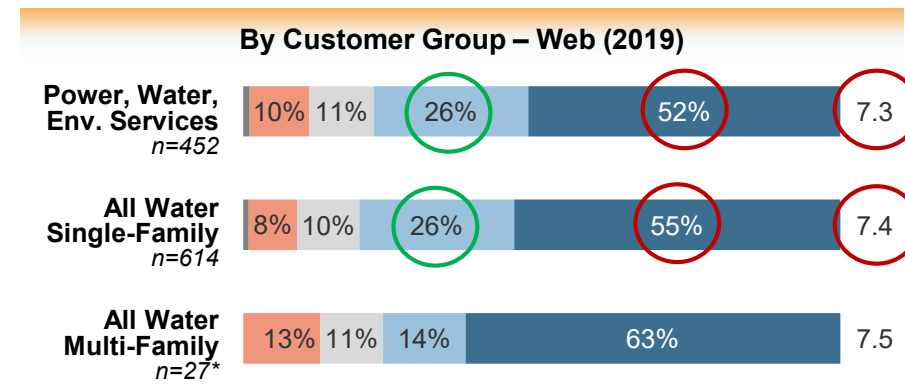
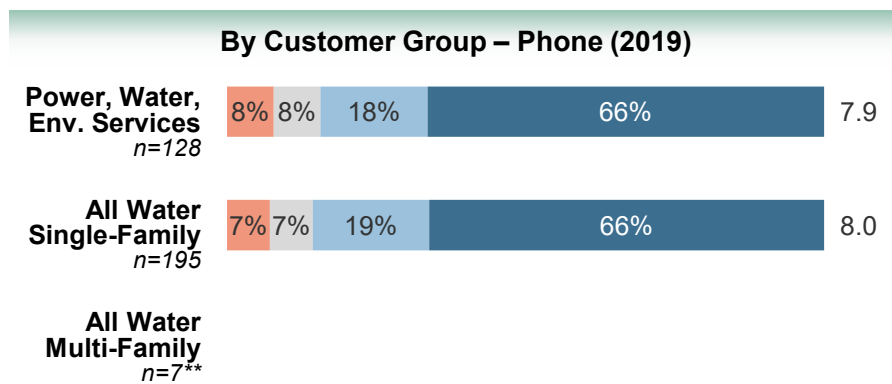
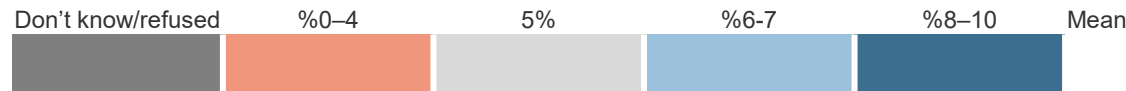
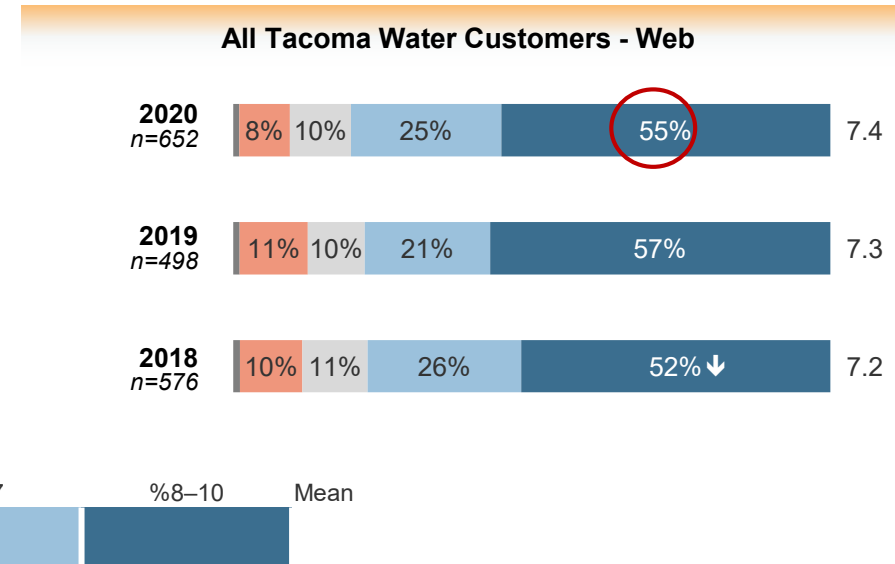
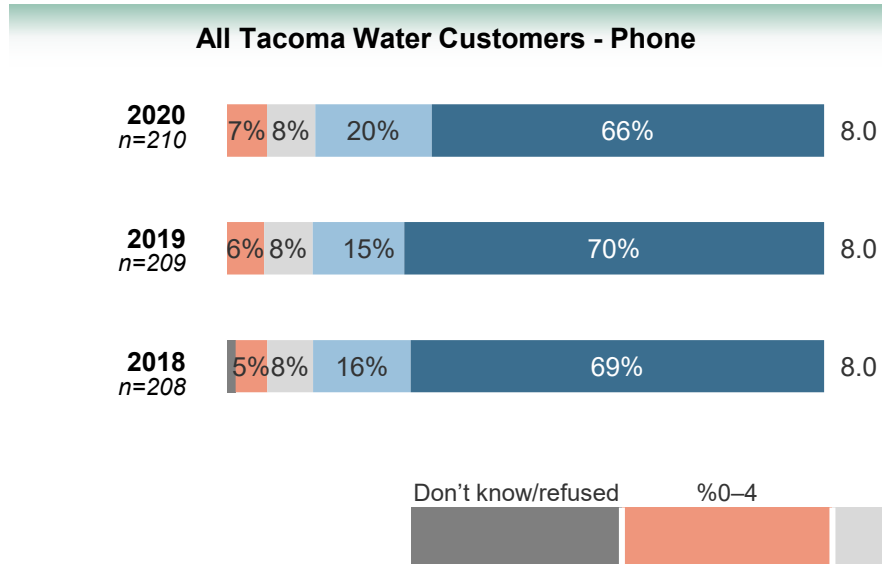
Q5\_1. What does Tacoma Water do well to earn your satisfaction? (Asked of respondents who answered Q3\_2 with a rating of 8-10)

Q5\_2. What does Tacoma Water need to improve most to earn your satisfaction? (Asked of respondents who answered Q3\_1 with a rating of 0-7)

↑↓ Indicate significant differences between the current wave and previous waves. ○ / ○ circles indicate significantly higher/lower percentages for web results versus the 2020 phone results.



# Value of Water Service



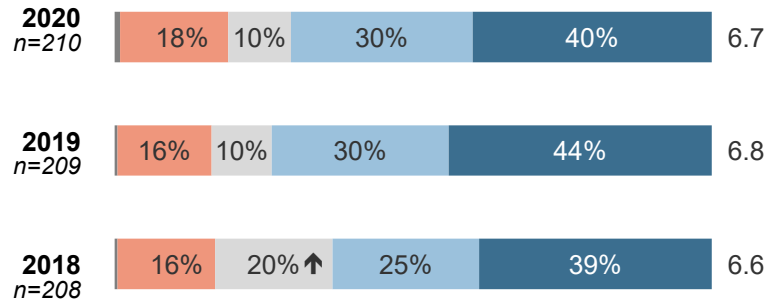
\*Base size <30, interpret results with caution, \*\* Insufficient sample size (n<10).

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

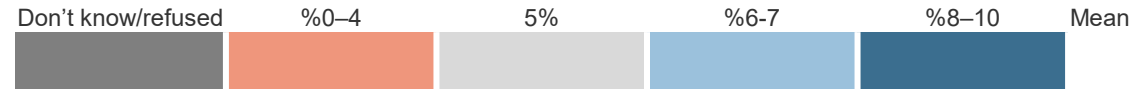
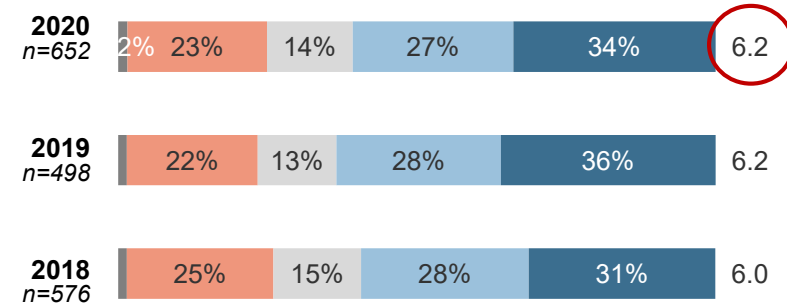
↑↓ Indicate significant differences between the current wave and previous waves. ○ / ○ circles indicate significantly higher/lower percentages for web results versus the 2020 phone results.

# Reasonableness of Water Rates

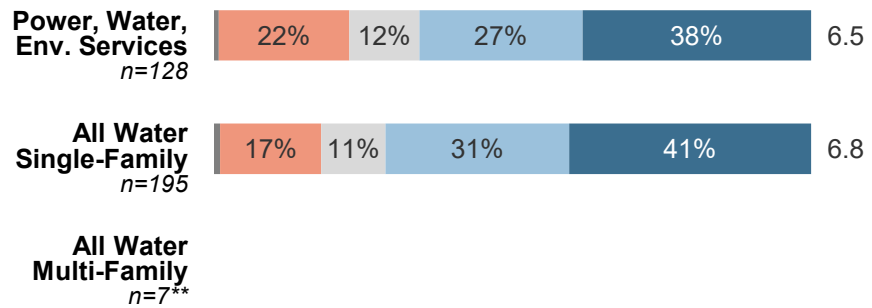
## All Tacoma Water Customers - Phone



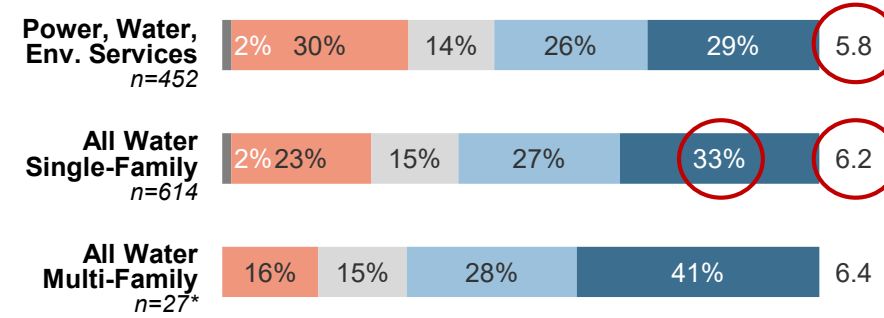
## All Tacoma Water Customers - Web



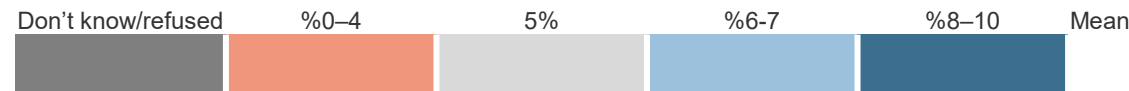
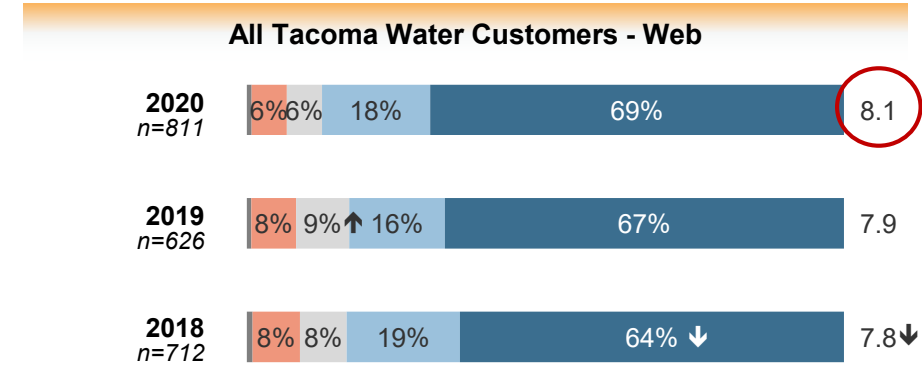
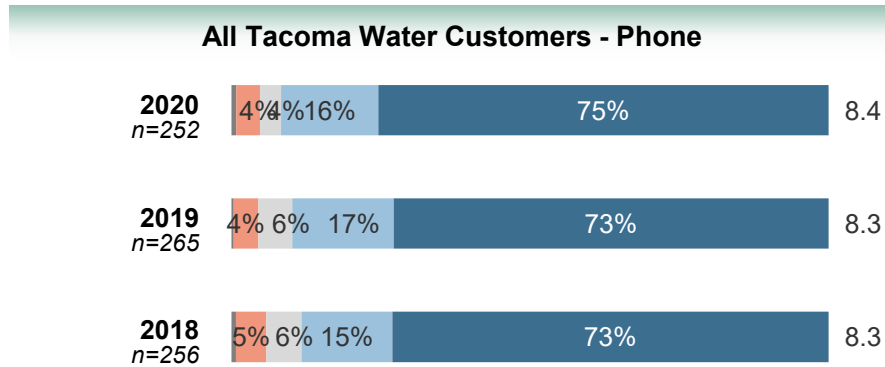
## By Customer Group – Phone (2020)



## By Customer Group – Web (2020)



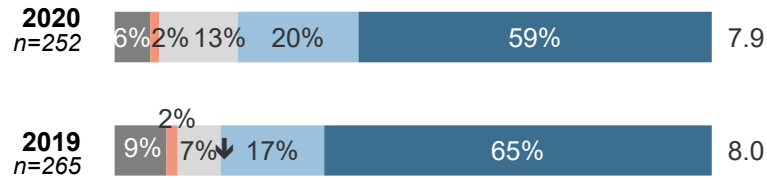
# Water Quality Measures Among All Customers Who Receive Water from Tacoma Water - Overall Quality



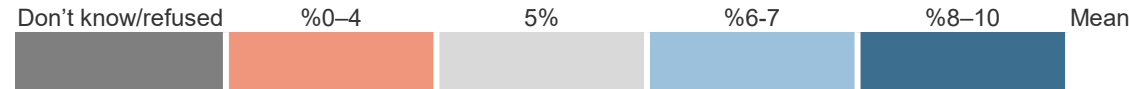
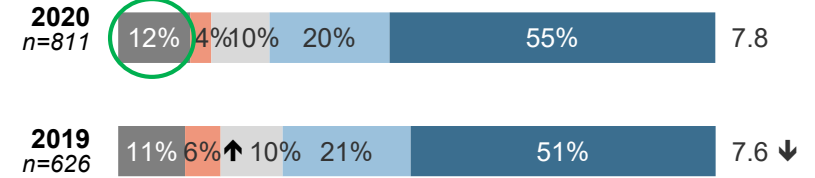
# Environmentally Responsible Sourcing and Delivery of Water



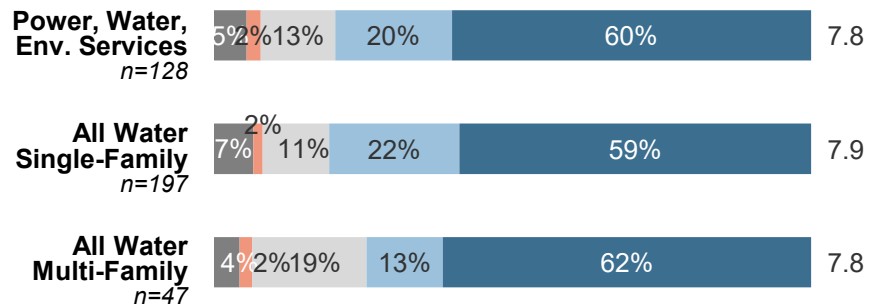
## All Tacoma Water Customers - Phone



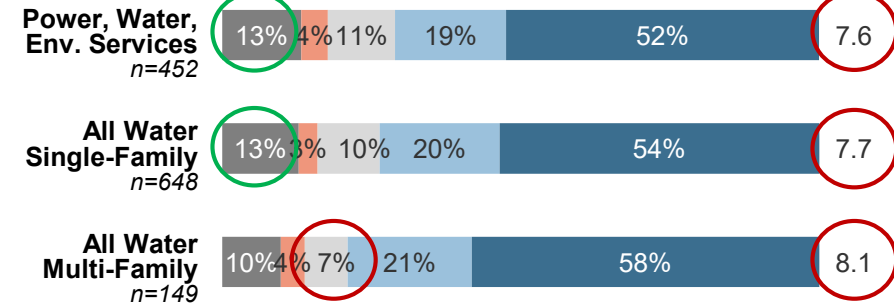
## All Tacoma Water Customers - Web



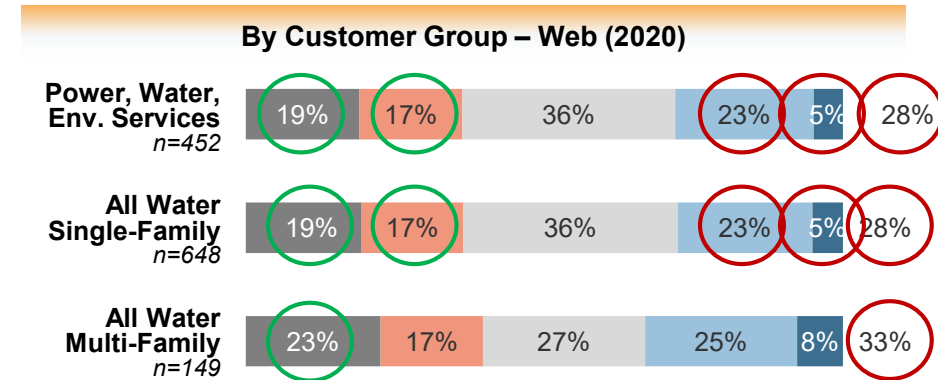
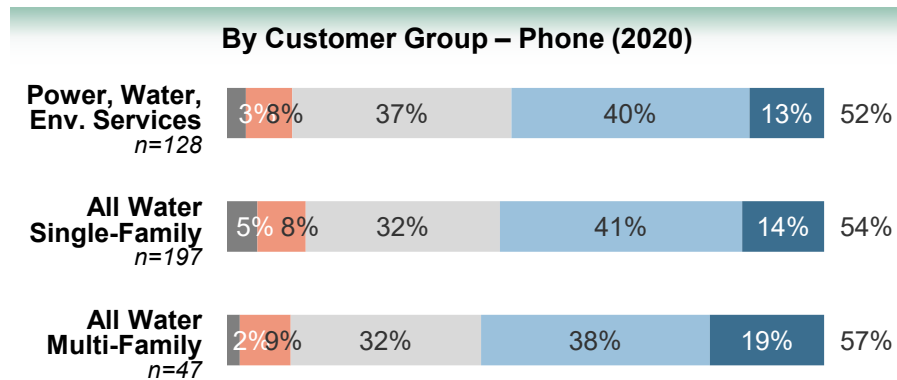
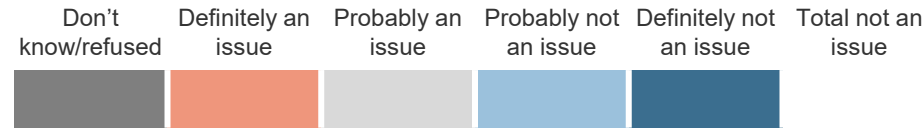
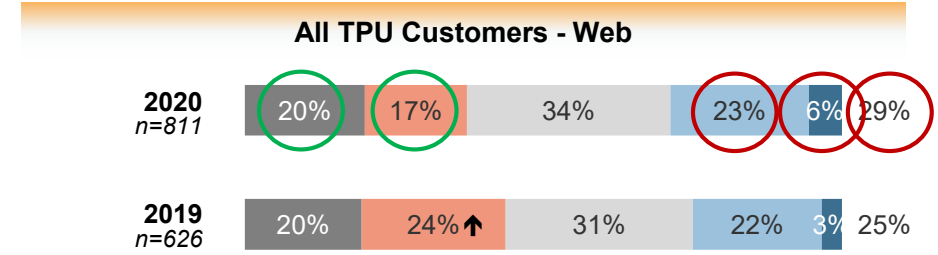
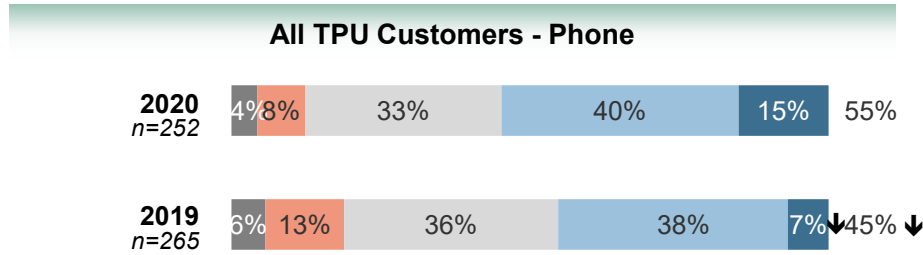
## By Customer Group – Phone (2020)



## By Customer Group – Web (2020)

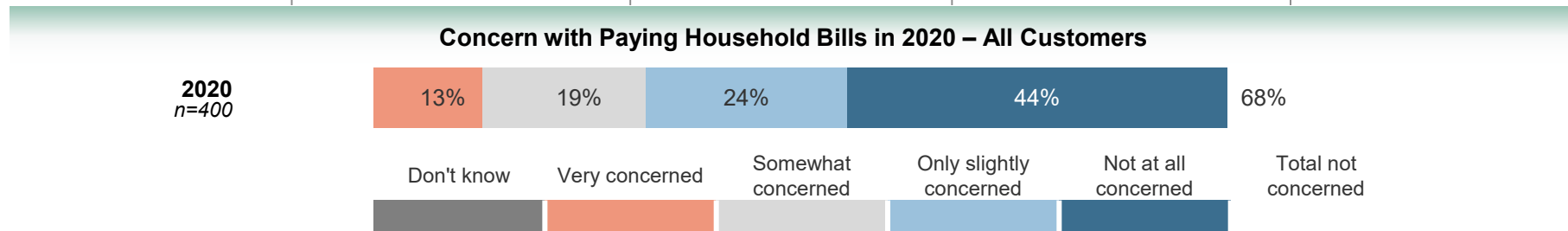
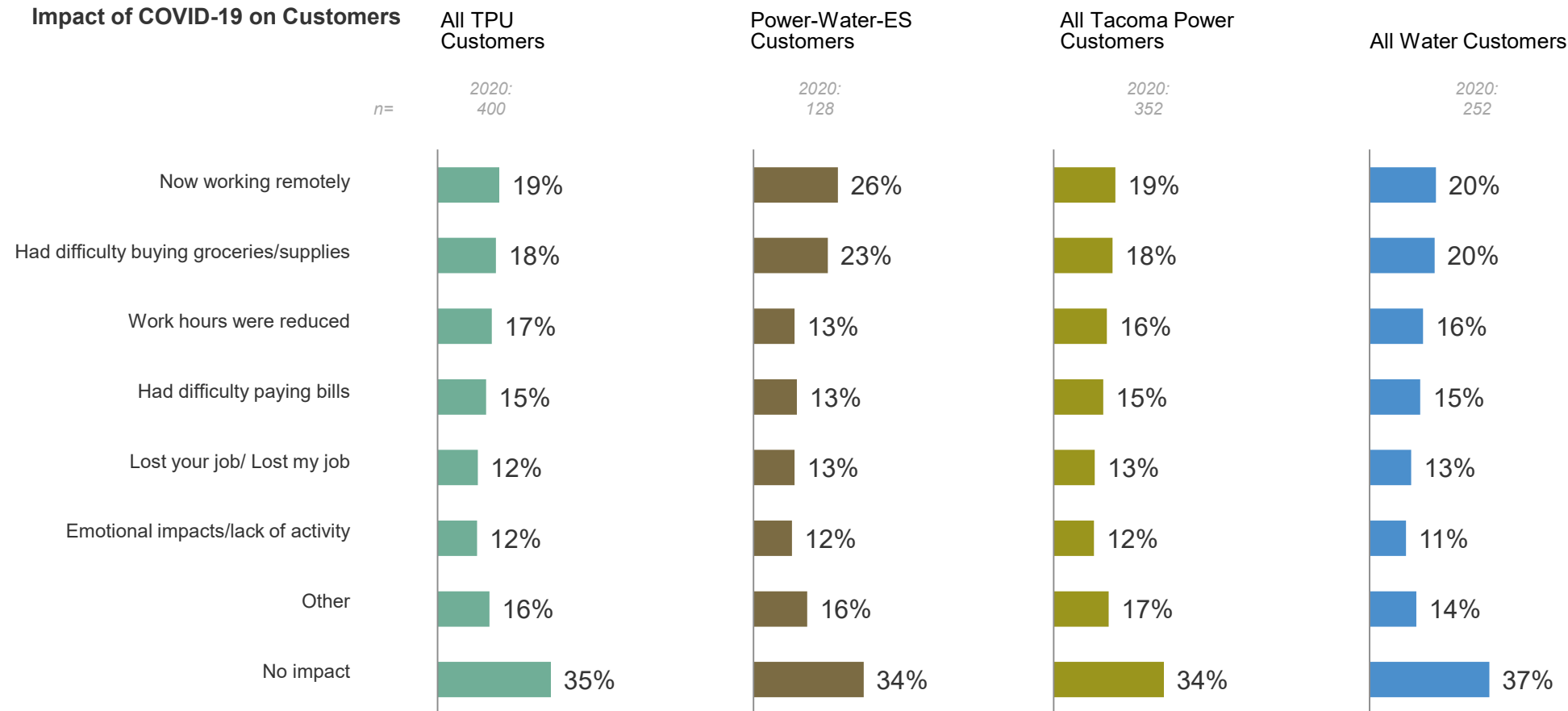


# Long-term Stability of Tacoma Area Water Supply

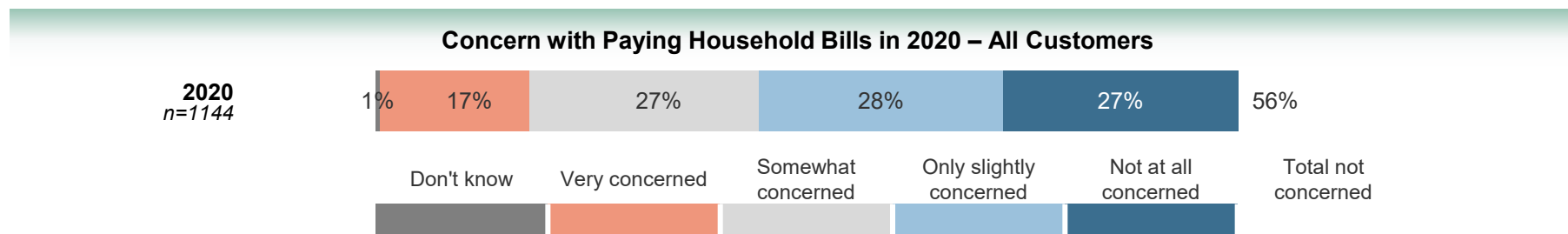
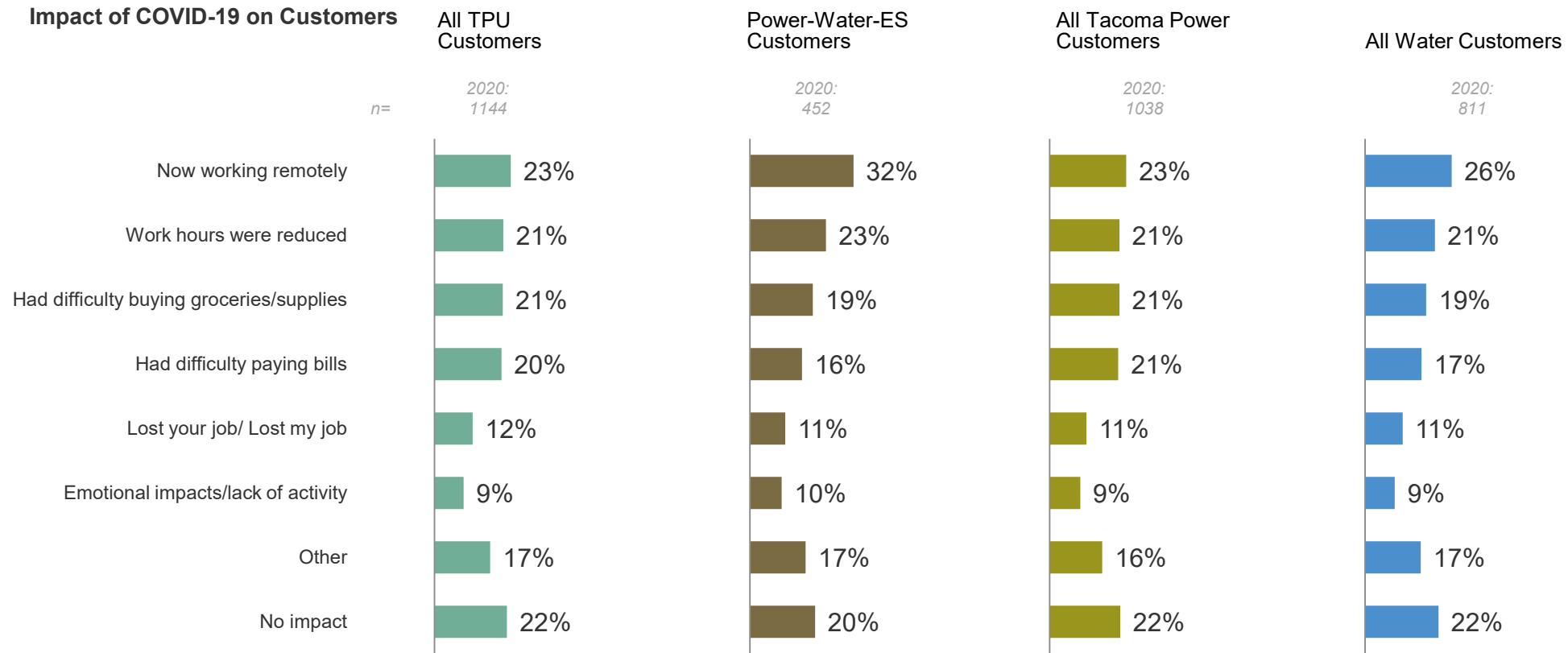


# COVID-19

# Impact of COVID-19 on TPU Customers – Phone

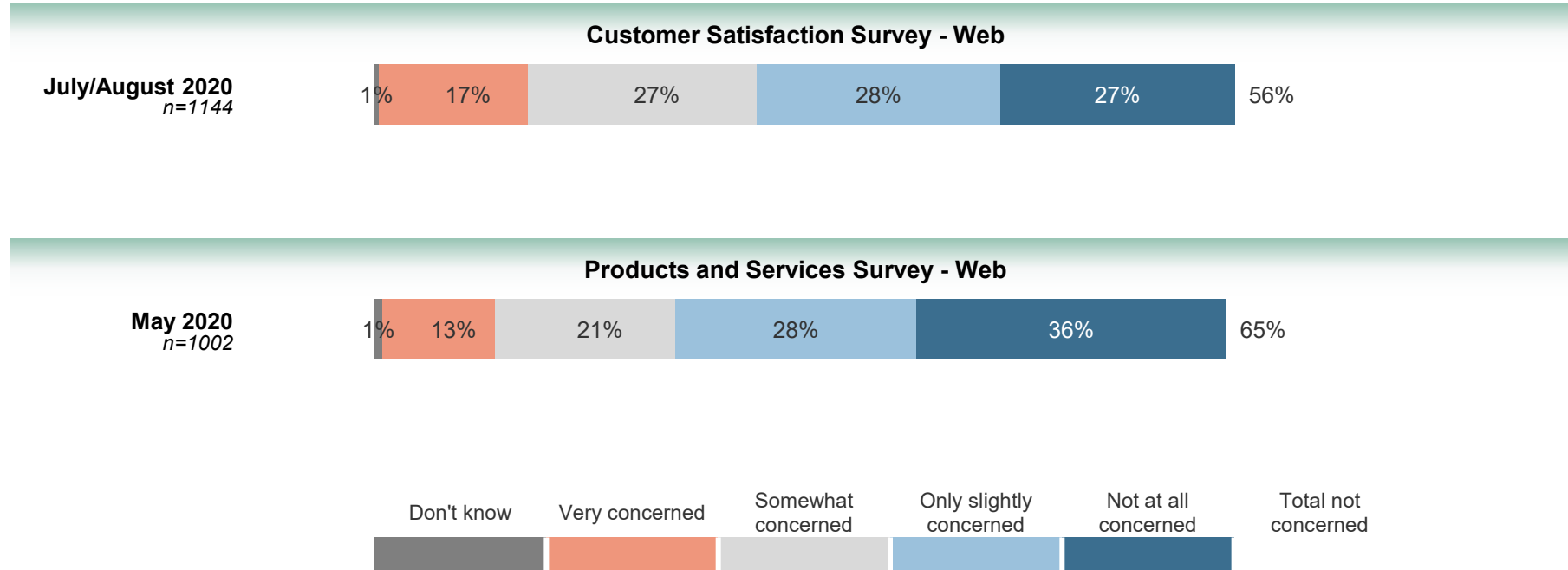


# Impact of COVID-19 on TPU Customers – Web





# Concern with Paying Household Bills in 2020



# Escalent National Energy Utility Benchmarking

## Residential Electric and Electric-Gas Utility Customers



Mean Benchmarking

	Phone			Web			Number of Utilities Rated
	Mean	Rank	Quartile	Mean	Rank	Quartile	
Having Friendly And Courteous Employees	8.9	4	1	8.3	9	1	93
Having Knowledgeable And Well-Trained Employees	8.8	2	1	8.2	9	1	93
Providing Reliable Service	9.1	5	1	8.7	16	1	101
Being a Good Corporate Citizen in the Communities Served	8.2	4	1	7.6	14	1	93
Restoring Electric Service When Outages Occur	8.7	5	1	8.3	16	1	100
Accessible By Phone During Outage	8.1	1	1	7.7	6	1	88
Promptly Fixing Customer Problems	8.4	2	1	8.0	4	1	88
Being Easy To Do Business With	8.6	7	1	8.0	16	1	98
Reliable Estimates of Power Restored	8.1	7	1	7.9	7	1	93
Helping Customers Use Energy Safely	8.2	5	1	7.9	8	1	93
Being A Company You Can Trust	8.2	10	1	7.8	17	1	97
Having Bills That Are Easy To Understand	8.6	6	1	8.0	32	2	95
Letting You Know What Caused Outage	7.4	4	1	7.0	22	1	90
Being Well-Managed	8.0	7	1	7.6	30	2	98
Providing Accurate Bills	8.5	9	1	8.0	33	2	95
<b>Overall Satisfaction</b>	<b>8.5</b>	<b>12</b>	<b>1</b>	<b>8.1</b>	<b>29</b>	<b>2</b>	<b>101</b>
Value of Electric Product Delivered	8.3	3	1	7.8	33	2	97
Programs to Help Customers Use Energy More Efficiently	7.6	13	1	7.3	53	3	92
<b>Overall Favorability</b>	<b>8.1</b>	<b>28</b>	<b>2</b>	<b>7.9</b>	<b>41</b>	<b>2</b>	<b>100</b>