# Liberty Water
# Customer Satisfaction - Final Report

August, 2010

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Objective

# Objectives & Methodology

## Objectives

- Compare current customer satisfaction levels with 2009 index scores
- Analyze satisfaction at the overall level as well as by Business Manager

## Methodology

- A total of 1,003 surveys from Liberty Water's customers were completed
- 1003 interviews were completed through the phone
- Interview were conducted in the 4 areas Liberty Water services:
  - Central Arizona: LPSCO, BM: Matt Garlick
  - Southern Arizona: Bella Vista, Rio Rico, Northern Sunrise, Southern Sunrise, BM: Martin Garlant
  - Eastern Arizona: Black Mountain, Gold Canyon and Entrada del Oro, BM: Charlie Hernandez
  - Central US: Tall Timbers, Timber Creek, Woodmark, Big Eddy, Holly Ranch, Ozark Mountain, Holiday Hills, BM: Joe Wilkins (through Sean Lonergan)
- For each of the 4 business manager 250 interviews were completed
- The study was fielded from August 3rd to August 17th, 2009

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Key Findings/Recommendations

# Key Findings & Recommendations

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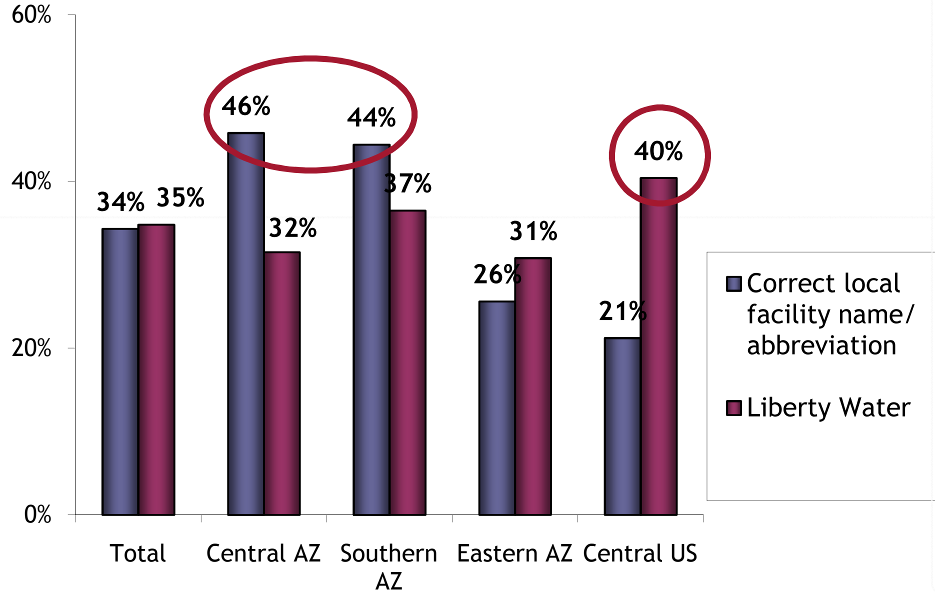
# Awareness

**Respondents were familiar with the name of the facility that provides water/waste water to their home**

- The Liberty Water name has caught on fairly well since its introduction with about 35% of customers aware of it.
- Customer in the Central US were most aware of the name Liberty Water.
- Central AZ and Southern AZ service providers were still known mainly by their local facility name, which is not surprising as these customers had the strongest familiarity in 2009 with their facility name.




- On a facility level, customers of the following providers were most familiar with the Liberty Water name:
  - LPSCO
  - Bella Vista
  - Entrada del Oro
  - Holiday Hills
- Facilities with customers more familiar with the facility name rather than Liberty Water were:
  - Southern Sunrise
  - Tall timbers

| Association with Liberty Water | | | | Association with Local Facility Name | | | |
|---|---|---|---|---|---|---|---|
| Central AZ | Southern AZ | Eastern AZ | Central US | Central AZ | Southern AZ | Eastern AZ | Central US |
| LPSCO | Bella Vista | Entrada del Oro | Holiday Hills | N/A | Southern Sunrise | N/A | Tall Timbers |

# Perception

### A positive perception of the facilities was reported

- Overall, 68% of respondents made positive comments.
    - *Good/like it* mentioned by 65% of respondents.
- Fewer than one third of respondents (29%) commented negatively.
    - Key concern was *cost is too high/expensive* mentioned by 20% of respondents, especially among customers in the Eastern AZ and Central US service areas (35% and 26%).
    - *Poor water quality:* 6%

### Central AZ respondents were most positive, while Eastern AZ customers had the worst perception

- Respondents in the Central AZ service area were most likely to describe their facility positively (82%) and least likely to give negative comments (16%).
- Eastern AZ respondents were on the opposite spectrum being least likely to describe their provider positively (46%) while giving the most complaints (41%).

# Water Services

**Satisfaction with water services received remained high.**

- Top satisfactory aspects were:
  - *Availability when needed* was rated as satisfactory/very satisfactory (top 2 box score) by 93% of respondents (92% in 2009).
  - *Color of tap water:* 84% gave top 2 box satisfaction ratings (83% in 2009).

**Price was the only area that received lower satisfaction ratings compared to 2009.**

- Only 51% of respondents rated the *price charged* satisfactory/very satisfactory compared to 58% in 2009.
- Central US customers were least satisfied with the price charge. Among them only 33% stated the price was satisfactory/very satisfactory.

**17% of interviewed customers reported service interruptions. The fewest water interruptions were reported by respondents in the Central AZ service area.**

- Only 4% of respondents in Central AZ had interruptions in the last year compared to 24% in Southern AZ and 27% in the Central US.
- Within Southern AZ, Southern Sunrise residents experienced the most water interruptions by far with 45% of respondents reporting outages. However this number is down from 69% in 2009

**Water interruptions were resolved quickly in all areas as reported by 83% of affected respondents.**

Key Findings/Recommendations

# Water Services (Cont.)

**Advance notifications remained somewhat few or were not remembered**

- Overall only 39% of respondents (slightly down from 46% in 2009) with scheduled interruptions had received advance notifications. Customers in Central AZ were most likely to have received a notification (57%).

  ➢ Improve on notifying residents of scheduled water interruptions in advance

| **Notification Sent to Respondents reporting SCHEDULED interruption** | TOTAL 2010 | Central AZ | Southern AZ | Central US |
|---|---|---|---|---|
| Yes | 39% | 57% | 41% | 33% |
| No | 61% | 43% | 59% | 67% |
| Not applicable/no scheduled interruptions | Excluding N/A from the percentage base | | | |

**Fewer options of improving advance notifications were desired compared to feedback in 2009. Key was getting reminders shortly before the interruptions would take place.**

- *Send reminder notice day before interruption* selected by 47%
- *Reminder call day of interruption* (46%)

**Improvements to water filtration and price were the two most often mentioned improvements to water services (14% and 14%, respectively).**

- Central US residents continued to complain most about their water rates (22%) but were less concerned with the water quality compared to the other regions. When asked about rates of services and utilities they received, they were more likely to find their water and/or waste water service expensive (see table in slide 13).

**Overall, satisfaction and feedback with water service received was consistent with 2009. Concern about high/rising prices was the only area with significant negative changes. However, this has not affected satisfaction with services received.**

# Customer Billing

**Respondents reported a high level of satisfaction with customer billing, slightly up compared to 2009.**

- Top satisfaction was reported with:
  - *My bill is easy to read:* 91% (top 2 box agreement = 91% of respondents stated they agree or strongly agree; compared to 88% in 2009)
  - *My bill is easy to understand*: 90% compared to 86% in 2009
- Residents in the Eastern AZ and Central US service areas were less satisfied with their customer billing. However, satisfaction was still high with 71% or more providing positive scores (top 2 box agreement).

**Almost two thirds of respondents (60% vs. 62% in 2009) stated they read information inserts in their bill *sometimes* or *always*.**

- A lower rate of readership of information inserts was reported among respondents in Eastern AZ (54%). They appear to be less informed and less satisfied with the services they receive.

**Website usage was low with only 15% of interviewed customers having accessed the new website. Those who used the website services were very satisfied.**

- Online services utilized by most were:
  - *Access to account information online* (77% of those that had accessed the website)
  - *Pay online by credit card* (60%)
- Satisfaction with most of the online services was very high with 77% or more stating they were somewhat or very satisfied.
  - *Ease to receive customer support* was the lowest scoring aspect but still satisfactory by 64% of website users.

# Customer Service

**About 41% of respondents had contacted customer service in the last year. Their experiences were very positive, even slightly up compared to 2009. Overall experience was rated excellent/good by 77% (vs. 68% in 2009) which is significantly up.**

- Eastern AZ residents were least likely to have contacted customer service.

**Offering longer office hours past 5 PM on weekdays was requested by more then one quarter (27%).**

- Residents in Southern AZ were especially interested in late weekday hours (39%).

**Wait time to speak to a live person should be less than 4 minutes.**

- A wait time of less than 4 minute was considered acceptable by 52% of respondents. If the wait dropped until 2 minutes 80% of respondents would be satisfied.
- A wait time of more than 5 minutes was unacceptable by 84%.

**Customer service in Spanish was not of great demand. However, customers in the Southern AZ service area (17%) were more likely to prefer being offered Spanish customer service compared to overall (9%).**

# Home Visits by Service Representative

**Only 6% of respondents reported receiving a home visit by a service representative within the last year. Home visits were rated highly satisfactory.**

- Customers in Southern AZ reported receiving the most home visits by service representatives, with 15% stating they received at least one visit.
- Eastern AZ and Central US received the fewest home visits; 98% and 96% of respondents respectively stated no service representative had come to their home.
- All aspect of the service representatives' home visit were rated highly, with agreement scores (agree/strongly agree) that services were performed well at 73% and higher.

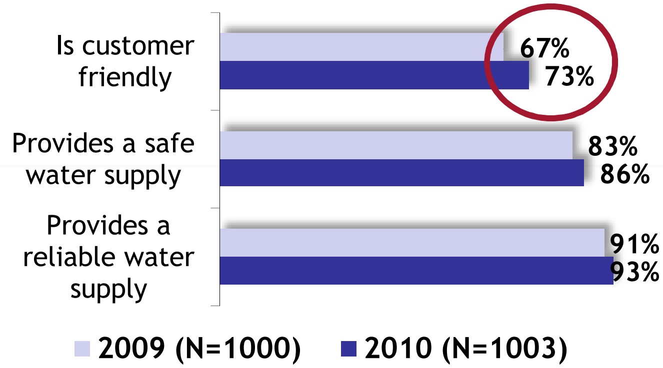
**Overall satisfaction with service representatives' home visits was high as 84% (slightly up from 81% in 2009) stated they were somewhat or very satisfied.**

# Company Evaluation

**Customers were highly satisfied with water/ waste water facility on *provides a safe water supply* and *provides a reliable water supply.***

- *Provides reliable water supply:* 93% (top 2 box agreement = 93% of respondents stated they agree or strongly agree; slightly up from 91% in 2009).
- *Provides a safe water supply:* 86% up from 83% in 2009.
- *Is customer friendly* was up significantly compared to 2009. 73% agreed or strongly agreed with the statement in regards to their provider compared to 67% in 2009.
- The other elements of the company evaluation rated somewhat lower but still with more than two thirds in agreement that the company was *a good neighbor* and/or *encourages water conservation.*

**Top 2 Box Scores (4,5): 5 = Strongly Agree**



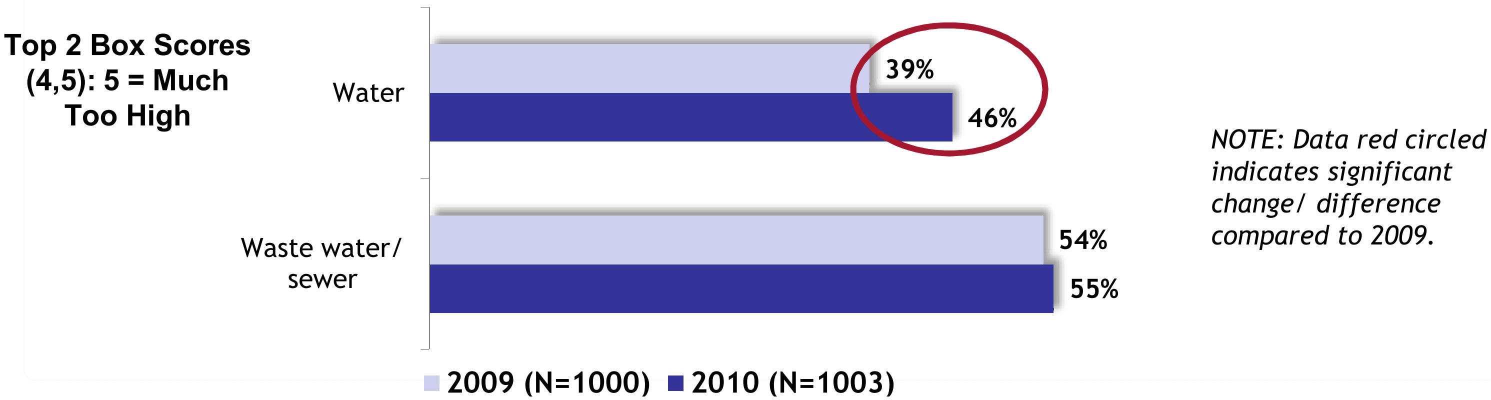

*NOTE: Data red circled indicates significant change/ difference compared to 2009.*

- Similar to 2009, *good neighbor* and *customer friendly* received lowest ratings in Eastern AZ and by residents serviced by the Gold Canyon Sewer Company.

| Agree with statement (Top 2 box score: 4/5 = agree/strongly agree) | Total 2010 | Eastern AZ | Gold Canyon |
|---|---|---|---|
| Good neighbor | 68% | 44% | 36% |
| Customer friendly | 73% | 50% | 44% |

# Company Evaluation

**Significantly more customers (46%) felt that their water service was somewhat or much too high. Perception of waste water/ sewer remains at the same level as in 2009.**




- Respondents in the Central US service area were least satisfied with their water and waste water prices.
- Eastern AZ customers felt strongly that their waste water prices were too high (76%).

| Rates of Utilities (Top 2 box score: 4/5 = somewhat/much too high) | Total 2010 | Central AZ | Southern AZ | Eastern AZ | Central US |
|---|---|---|---|---|---|
| Water | 46% | 40% | 36% | 45% | 64% |
| Waste water/sewer | 55% | 34% | 47% | 76% | 60% |

Key Findings/Recommendations

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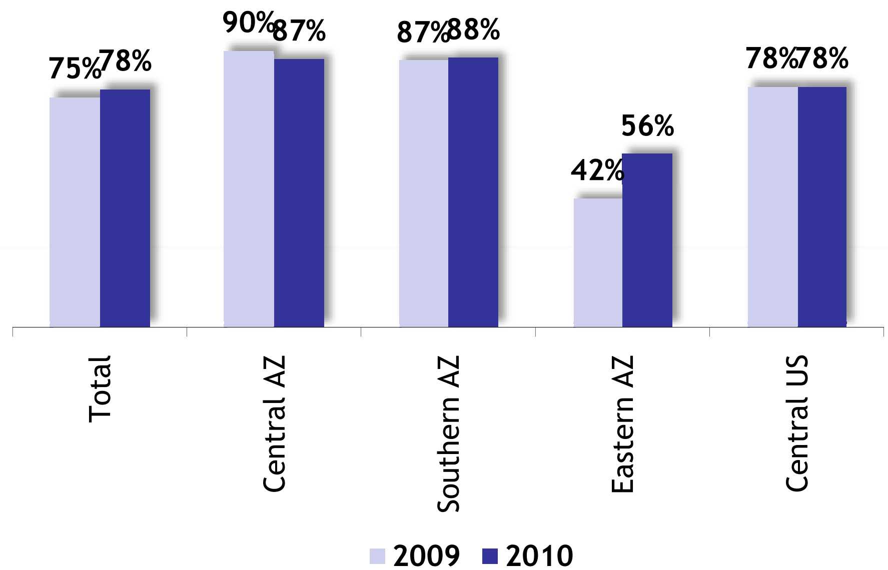
# Company Evaluation

**Overall Satisfaction with their facility was rated high with 78% of respondents being somewhat or very satisfied.**

- Eastern AZ received lowest satisfaction scores with only 56% of respondents satisfied with their facility. However, satisfaction levels among these customers were up significantly compared to 2009 (42%).

**Top 2 Box Scores (4,5): 5 = Very Satisfied**




**Provide additional information on *upcoming service improvements* and *water conservation.***

- *Upcoming service improvement* information was requested by 25% of respondents.
- *Water conservation* information was specifically desired by customers in Central and Southern AZ, requested by 20% and 24% of the customers respectively.

Key Findings/Recommendations

# Overall Findings Re Rate Hikes

In 2010 customers' feedback regarding their satisfaction with their water and/or waste water provider were positive. This was true for the overall satisfaction rating as well as for specific services tested such as water service, billing, customer service and home visits by service representatives.

Satisfaction ratings remained level compared to 2009 and in some instances even improved.

While several facilities have implemented rate hikes or are going through the formal process of getting rate increases approved, this has not affected customer satisfaction with the overall company performance or with specific service aspects to date.

However, satisfaction with the water prices decreased significantly mainly driven by customers in the Central US service area.

It is essential to continue with public relations campaigns to help customers understand why rates are increasing, how it will benefit customers in the long run and that Liberty Water is a "friend and good neighbor" who works to improve and help the community.

To alleviate the financial burden of the customers facing upcoming rate hikes, it is suggested to implement small rate increases gradually over time (preferred by 89%).

There was considerable interest in information and involvement in the process for rate hikes.

- About half (53%) of the interviewed customers very likely to attend informational meetings. Those in Eastern AZ indicated a higher likelihood to attend (64%) compared to customers in the other service areas.
- Over two thirds (67%) indicated they were very or somewhat interested in understanding how rate hikes are determined.

# Recommendations

## Water Services

- Main concerns were price.
  - Given that reducing prices may not be an option, it is essential for Liberty Water to continue with comprehensive public relations campaigns to increase customer understanding and acceptance of the rate increases. Address price concern especially in the Central US service area.
- Advance notification of scheduled interruptions or awareness of notifications was low.
  - Continue to improve on notifying residents of scheduled water interruptions in advance possibly though different design and coloring schemes of notices.
  - Customers requested reminders especially the day before and on the day of the outage.
  - Utilize technology (phone calls/ email/ online postings) to notify and remind residents of outages.

## Website and Online Services

- Website usage was low with only 15% of customers using it.
  - Promote new website and new services included.

## Customer Service

- Customers were overall satisfied with the service they received. Some measures to further improve customer satisfaction include:
  - Offer longer office hours, being open past 5PM, especially in Southern AZ.
  - Keep wait times to speak to a live person to less than 4 minutes, preferably to less than 2 minutes.
  - Offer Spanish customer service specifically in the Southern AZ service area.

# Recommendations (Cont.)

## Overall Company

- Overall Liberty Water received high ratings on the various elements of the company evaluation. Some aspects however rated somewhat lower for certain areas:
  - Improve perception of facilities as *good neighbor* and *customer friendly,* especially in Eastern AZ and for the Gold Canyon facility .
  - Boost messages on *water conservation.*

## Eastern AZ

- Those provided with waste water/sewer services in Eastern AZ tended to be least satisfied with their service providers. Gold Canyon Sewer Company continued to receive lowest scores, however up compared to 2009. Areas of improvement continue to be:
  - Provide educational and information campaigns as to why rates need to be charged, especially for Gold Canyon.
  - Improve perception of company as a good member in the community: *good neighbor* and *customer friendly.*
  - When communicating with customer, use additional method including online/email besides inserts into the bill. Only 54% of respondent stated they read them sometime/always.

## Southern AZ

- Satisfaction with Southern AZ facilities was high overall. However, respondents for the Southern AZ service area reported higher numbers of water interruptions than other facilities and overall lower ratings on several aspects and overall company satisfaction.
  - Reduce water service interruptions.
  - Ensure residents receive advance notification for scheduled water service interruptions.
  - Educate why rates need to be charged at the level or increased level.

Detailed Findings

# Detailed Findings
-
# Respondent Profiles & New Questions

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Respondent Profile

# Respondent Profile

| | Total | Central AZ | Southern AZ | Eastern AZ | Central US |
|---|---|---|---|---|---|
| **Contact** | | | | | |
| Residence | 100% | 100% | 100% | 100% | 99% |
| Business | 1% | 0% | 0% | 0% | 1% |
| **Gender** | | | | | |
| Male | 52% | 53% | 53% | 51% | 51% |
| Female | 48% | 47% | 47% | 49% | 49% |
| **Age** | | | | | |
| 18 to 24 years | 2% | 2% | 3% | 1% | 1% |
| 25 to 34 years | 10% | 10% | 18% | 2% | 9% |
| 35 to 44 years | 12% | 14% | 21% | 8% | 7% |
| 45 to 54 years | 12% | 15% | 13% | 13% | 9% |
| 55 to 64 years | 21% | 23% | 18% | 26% | 19% |
| 64 years or older | 43% | 37% | 28% | 51% | 56% |
| **Household Income** | | | | | |
| Under $25,000 | 7% | 4% | 12% | 5% | 8% |
| $25,000 - $49,999 | 17% | 14% | 25% | 12% | 18% |
| $50,000 - $74,999 | 19% | 21% | 22% | 16% | 19% |
| $75,000 - $99,999 | 12% | 12% | 11% | 14% | 13% |
| $100,000 - $149,999 | 8% | 14% | 6% | 7% | 6% |
| $150,000 or more | 5% | 6% | 1% | 9% | 5% |
| Prefer not to say | 31% | 29% | 23% | 39% | 32% |
| **Ethnicity** | | | | | |
| White/Caucasian | 79% | 76% | 63% | 87% | 90% |
| Black/African-American | 2% | 6% | 1% | 0% | 1% |
| Asian or Pacific Islander | 1% | 2% | 2% | 0% | 0% |
| Native American/Alaska Native | 1% | 0% | 2% | 0% | 0% |
| Hispanic/ Latino (White/Caucasian) | 8% | 6% | 21% | 3% | 1% |
| Hispanic/ Latino (Black/African-American) | 0% | 0% | 0% | 0% | 0% |
| Hispanic/ Latino (all other or multiple race) | 2% | 2% | 5% | 0% | 1% |
| Other | 1% | 2% | 1% | 0% | 1% |
| Prefer not to say | 7% | 6% | 6% | 8% | 6% |

*NOTE: Data in orange shaded cell are significantly higher; data in gray shaded cells are significantly lower: at 95% confidence level.*

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Respondent Profile

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# Respondent Profile

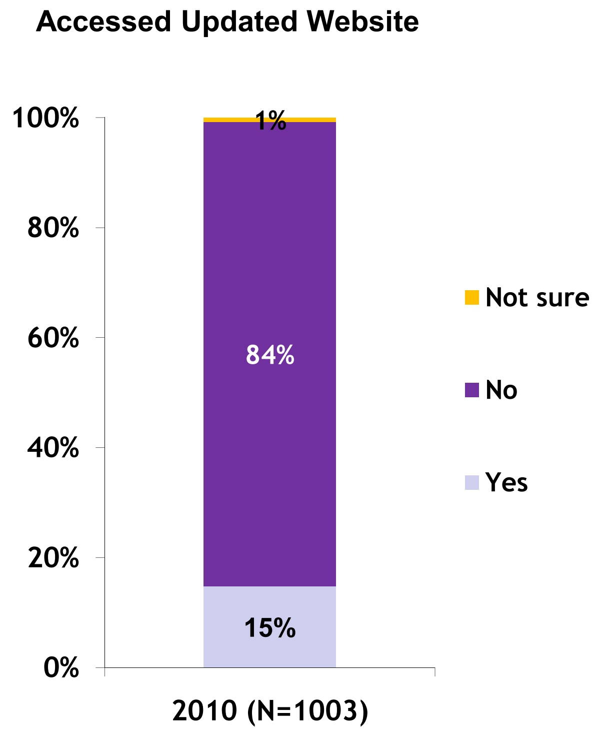
| | Total | Central AZ | Southern AZ | Eastern AZ | Central US |
|---|---|---|---|---|---|
| **Children in Household (Average per age)** | | | | | |
| Under 3 years of age | 1.21 | 1.23 | 1.25 | 1.14 | 1.17 |
| 3 to 5 years of age | 1.11 | 1.05 | 1.19 | 1.00 | 1.08 |
| 5 to 9 years of age | 1.38 | 1.20 | 1.33 | 1.29 | 2.00 |
| 10 to 12 years of age | 1.17 | 1.17 | 1.20 | 1.00 | 1.20 |
| 13 to 17 years of age | 1.53 | 1.33 | 1.70 | 1.46 | 1.60 |
| **Education** | | | | | |
| Less than high school | 2% | 1% | 4% | 1% | 2% |
| High school/GED | 12% | 8% | 18% | 11% | 12% |
| Professional school/training (i.e., Mechanic, Be | 6% | 5% | 8% | 4% | 5% |
| Some college | 26% | 24% | 29% | 21% | 31% |
| Associate's Degree | 9% | 12% | 10% | 8% | 5% |
| Bachelor's Degree | 24% | 25% | 20% | 27% | 24% |
| Some Graduate School | 5% | 5% | 4% | 7% | 4% |
| Graduate School Degree | 16% | 20% | 8% | 21% | 17% |
| **Years in Current Residence** | | | | | |
| Less than one year | 10% | 9% | 17% | 7% | 7% |
| 1 to 5 years | 33% | 36% | 39% | 26% | 32% |
| 6 to 10 years | 31% | 42% | 19% | 36% | 26% |
| 11 to 20 years | 21% | 12% | 15% | 28% | 29% |
| More than 20 years | 5% | 0% | 9% | 3% | 7% |
| Don't know | 0% | 0% | 1% | 0% | 0% |

*NOTE: Data in orange shaded cell are significantly higher; data in gray shaded cells are significantly lower: at 95% confidence level.*

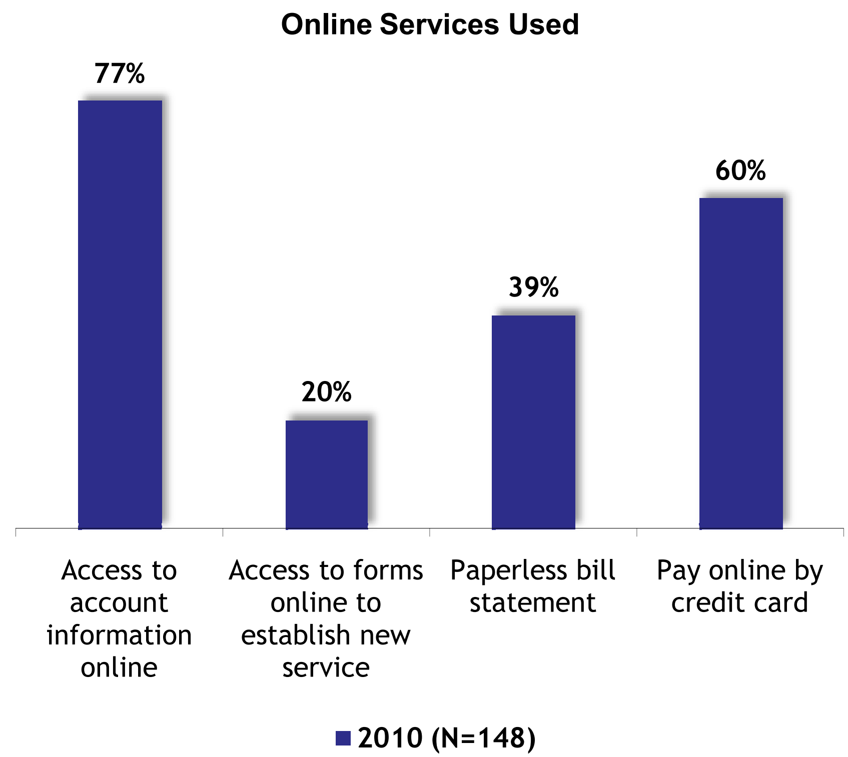
# Website - Online Services

15% of customers reported they had accessed the new Liberty Water website. Significantly more of those in the Central AZ service area stated they had accessed the new website (21%).

The online services used by most was *access to account information* (77%) followed by *pay online by credit card* (60%).




| Significantly Higher: Accessed Website |
|---|
| **Yes:** Central AZ (21%) |




*10N1. [INSERT FACILITY BASED ON QFAC] has updated their website in September 2009. Have you accessed the new website?*

*10N2. The following new services were made available to **[INSERT FACILITY BASED ON QFAC]** customers in the past year. Please tell me if you have used any of them?*

Detailed Findings - New

# Satisfaction Website - Online Services

Satisfaction with the online services customers had used was high.

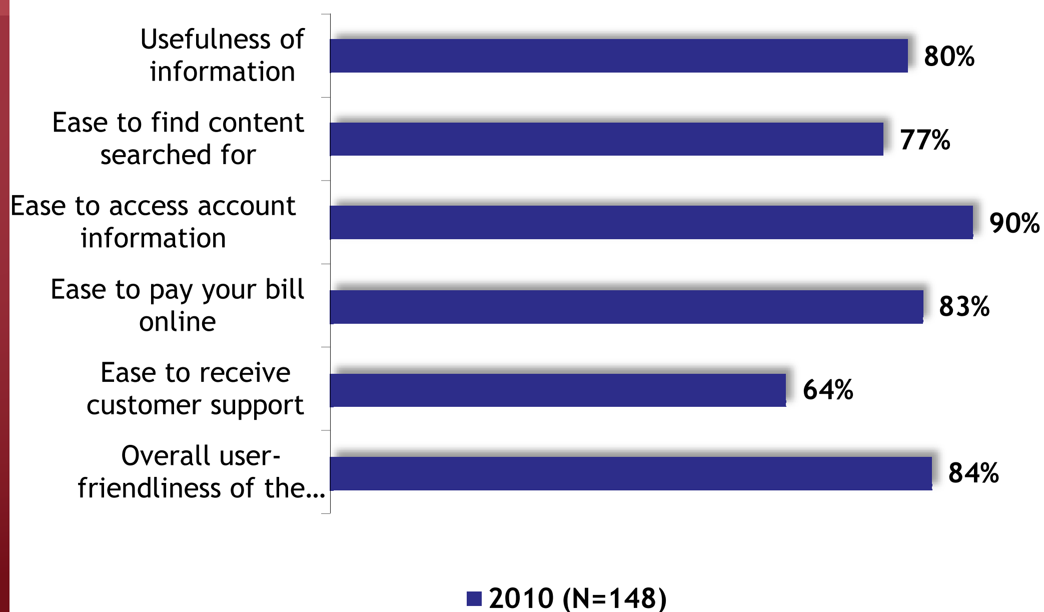
*Ease to access account information* received the highest satisfaction rating with 90% of customers indicating they were very or somewhat satisfied.

The only area that received relatively lower scores was *ease to receive customer support* (64%).

Not many customers had improvement suggestions for the website (84% had no suggestions and/or stated the site was fine as is). Those who had suggestions asked to *improve user interface/easier to navigate* and *add bank transfer as a payment option.*

**Satisfaction with Online Services Used**

**Top 2 Box Scores (4,5): 5 = Very Satisfied**




**Suggestions for improvements (N = 148)**

- 5% Improve user interface/easier to navigate
- 3% Add bank transfer as a payment option
- 84% No suggestions/fine as is

*10a. Using a 5-point scale where 5 is Very Satisfied and 1 is Very Dissatisfied, please tell me how satisfied you are with the new [INSERT FACILITY BASED ON QFAC] website.*

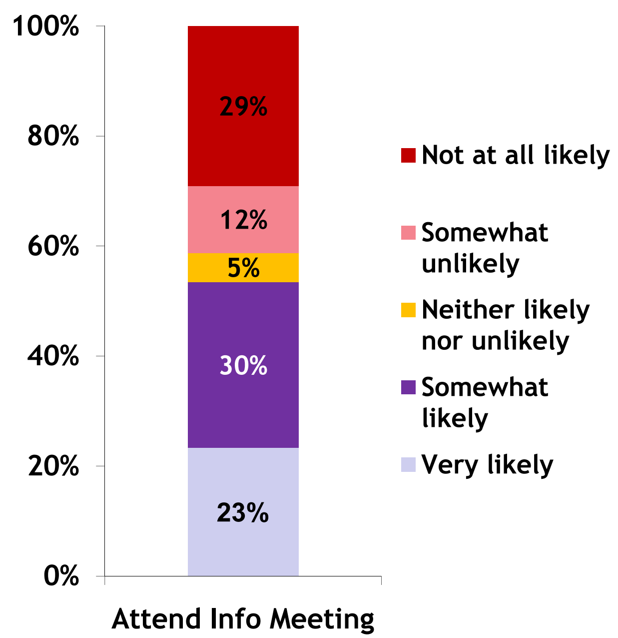
*10b. Do you have any suggestions for improving [INSERT FACILITY BASED ON QFAC] website and/or online services?*

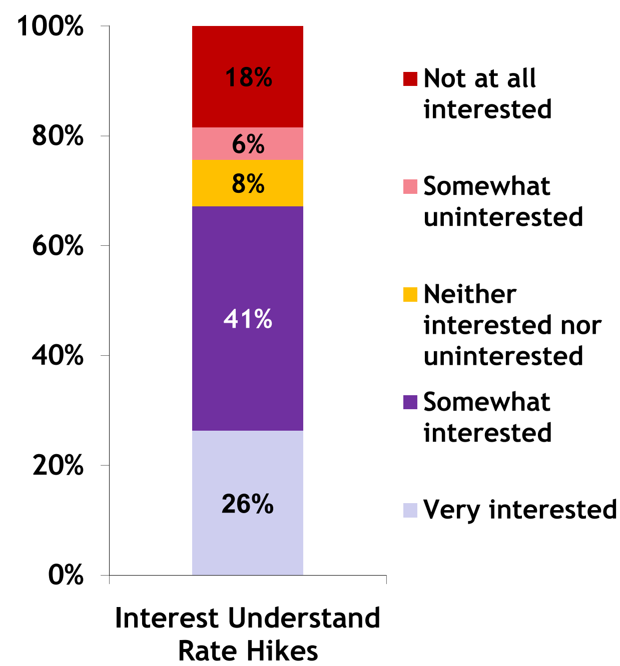
Detailed Findings - New

# Rate Hikes

In terms of customer involvement in rate hike cases, over half (53%) stated they were very or somewhat likely to attend an informational meeting. Those in Eastern AZ indicated a much higher likelihood to attend (64%) compared to customers in the other service areas.

Over two thirds (67%) indicated they were very or somewhat interested in understanding how rate hikes are determined.




*21a. If rate case informational meetings were held in your community how likely would it be that you would attend?*

*21b. How interested are you in understanding how rates are determined?*

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Detailed Findings - New

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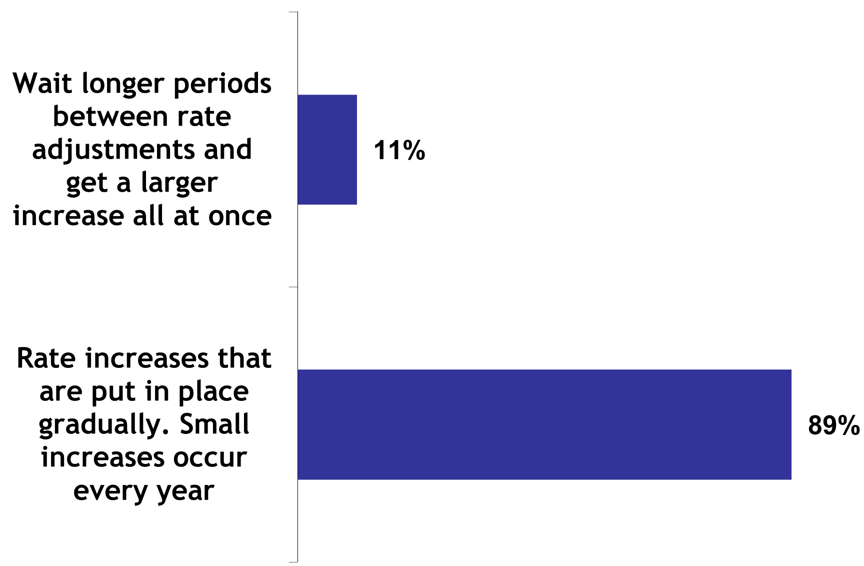
# Rate Hikes

In case of rate increases the vast majority (89%) preferred having the increases spread out over time with small increases occurring every year.




*21c. Regarding rate increases, given the opportunity would you prefer:*

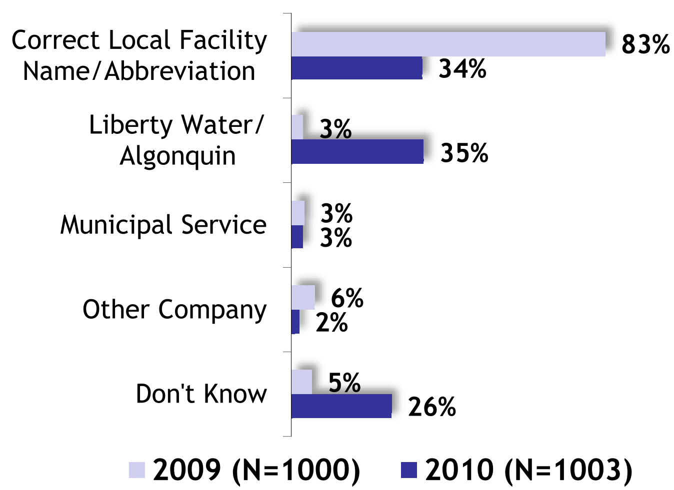
# Detailed Findings
# -
# Overall Findings

# Awareness & Perception

Familiarity with the water and/or waste water provider remained high. An obvious shift from the association with the local facility name to the newly branded Liberty Water name (35%) could be seen. Central and Southern Arizona tended to be most familiar with their facility name while respondents in the Central US tended to associate more strongly with the Liberty Water name.

When asked to describe their provider, 68% of comments were positive, slightly down from 71% in 2009. Overall positive and negative comments were fewer than in the previous year. Positive mentions like *good water quality* (3% vs. 8% in 2009) and *reasonable cost* (1% vs. 4% in 2009) went down, but so did negative comments like *cost/expensive* (20% vs. 24% in 2009), *poor water quality* (6% vs. 8% in 2009) and *low water pressure* (2% vs. 4% in 2009). Central AZ respondents tended to describe their service provider most positively while Eastern AZ respondents mentioned the most negative feedback.

**Name of Water/Waste Water Provider**




| Significantly Higher |
|---|
| **Correct Local Facility Name/Abbreviation:** Central AZ (46%), Southern AZ (44%) |
| **Liberty Water/Algonquin:** Central AZ (40%) |

| | 2010 | Difference from 2009 (percent points) |
|---|---|---|
| **Positive Comments (NET)** | 68% | -3 |
| Good/Like it (general) | 65% | -3 |
| Good water quality | 3% | -5 |
| Reasonable cost | 1% | -3 |
| **Negative Comments (NET)** | 29% | -7 |
| Cost/expensive | 20% | -4 |
| Poor water quality | 6% | -2 |
| Low water pressure | 2% | -2 |

*NOTE: Data in orange shaded cell indicate a significant change/difference compared to 2009.*

*A1. What is the name of the company that provides water and/or waste water service to your household/business?*

*A2. How would you describe your water and/or waste water service company and the services it provides?*

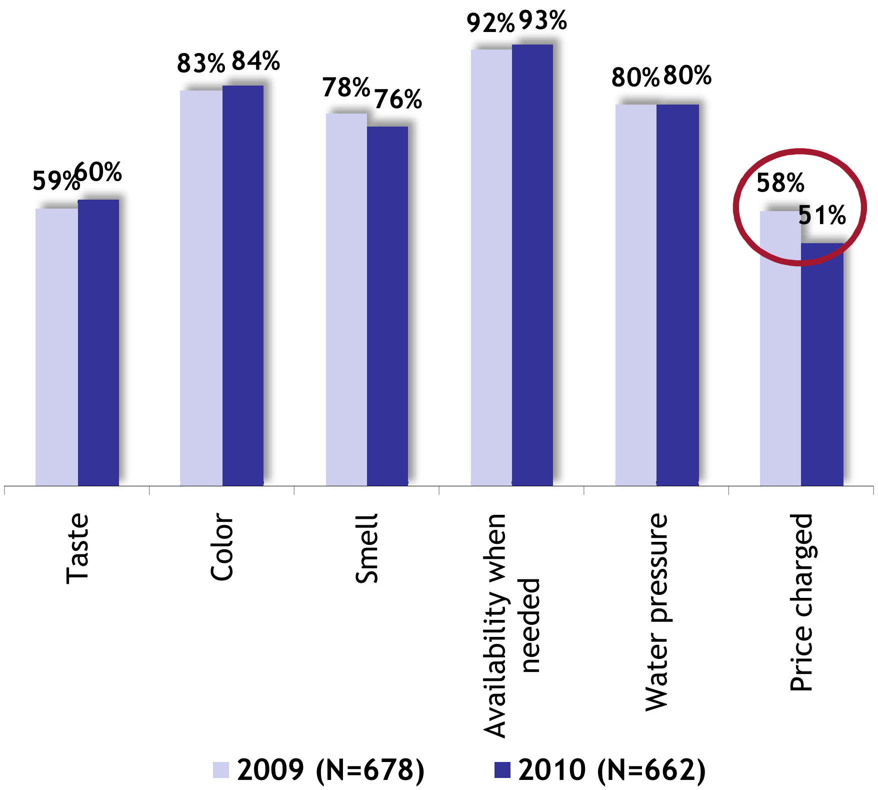
# Water Services - Satisfaction

Respondents continued to be most satisfied with the *water availability when needed*, with 93% giving it a 4 or 5 (where 5 = Very satisfactory). Other highly rated aspects of water service *were color* (84%), *water pressure* (80%) and *smell* (76%). Respondents were least satisfied with the *price charged* and *taste*.

Overall satisfaction with their water services remained the same compared the previous year. The *price charged* was the only aspect customers were less satisfied with. Only 51% (compared to 58% in 2009) felt the *price charged* was somewhat or very satisfactory.

Customers of facilities in the Central US were least satisfied with the *price charged*. Only 33% were somewhat or very satisfied.

**Top 2 Box Scores (4,5): 5 = Very Satisfactory**




| Significantly Higher Top 2 Box Scores |
| --- |
| **Price charged**: Central AZ (55%)/ Southern AZ (60%) vs. Central US (33%) |

*NOTE: Data red circled indicates significant change/ difference compared to 2009.*

*1. Please rate your water services in the following areas by using a 5-point scale with 5 being “Very Satisfactory” and 1 being “Not Satisfactory At All”.*

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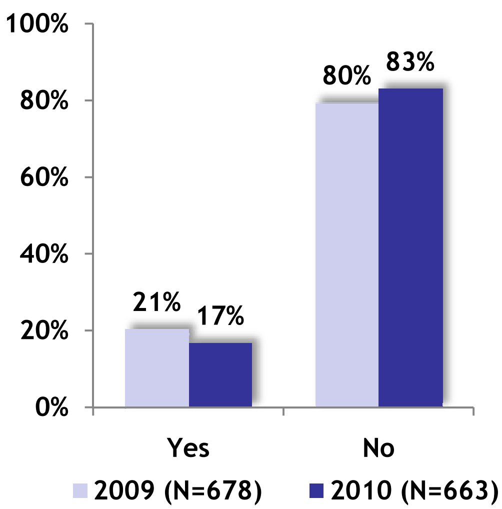
# Water Services - Interruptions

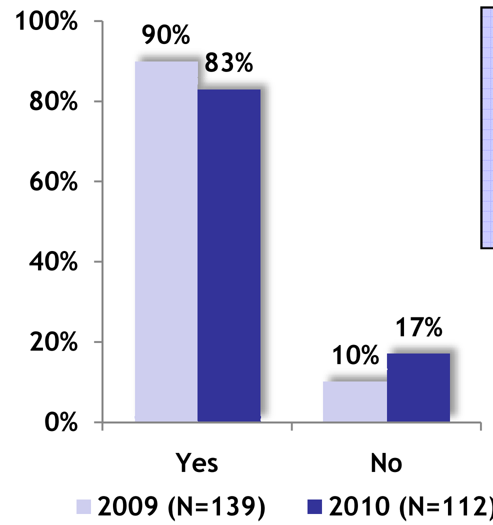
Fewer than 1 out of 5 customers (17%) reported a water interruption within the last year. Those in the Central Arizona service area reported significantly fewer interruptions as only 4% experienced an interruption compared to Central US (27%) and Southern AZ (24%).

Water interruptions were generally resolved quickly. Only 17% of respondents, or 19 respondents in total, indicated they were not resolved quickly.

**Water Interruption Within Last Year**




**Water Interruption Resolved Quickly**




**Why Not Resolved Quickly (N = 19)**

- Resolution took too long (10 mentions)
- No explanation for interruption (3 mentions)
- No notification of service interruption (2 mentions)

| Significantly Higher Water Interruption |
| --- |
| Central US (27%) vs. Southern AZ (24%) vs. Central AZ (4%) |

*2. Within the last year, have you had any interruptions to your water service?*
*3. Was your water service interruption problem resolved quickly?*
*4. Being as detailed as possible, please tell us how and why your water interruption problem was not resolved quickly.*

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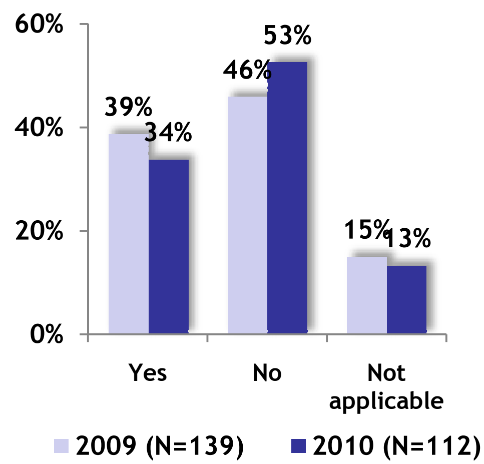
# Water Services – Interruptions Notification

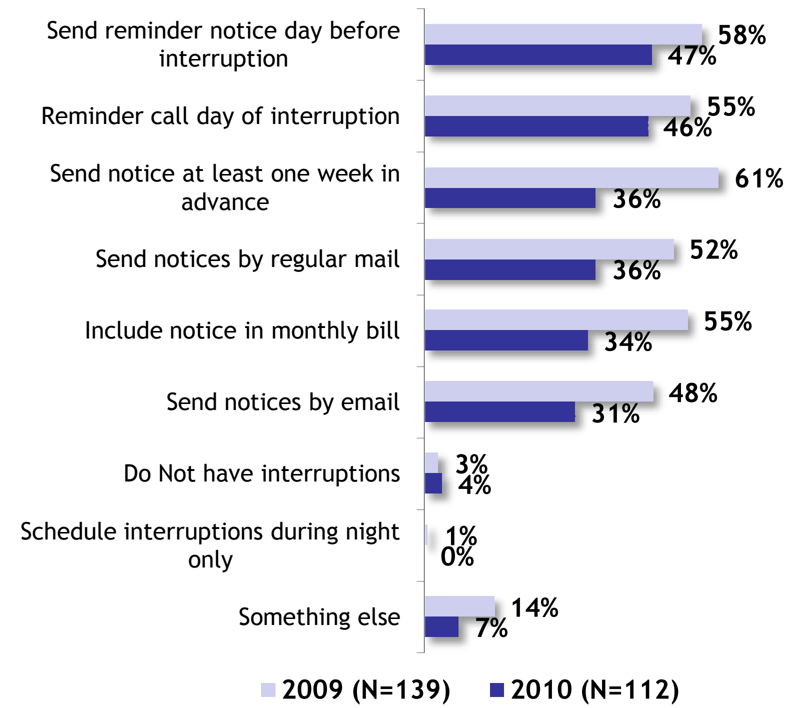
Among the customers who had experienced a scheduled water service interruption in the last year, 34% recalled receiving a notification in advance. Over half (53%) reported they had not received advance notification. This may indicate that advance notifications were not provided consistently or that residents did not notice them among other mailings or information.

Similar to 2009, customers requested a number of improvements to advance notifications, however fewer notification methods were stated. *Send reminder notice day before interruption* (47%) was considered the most important followed by *reminder call day of interruption* (46%).

**Advance Notification of Water Interruptions**




**Improvements of Notifications of Scheduled Service Interruptions**




*5. Are you notified in advance when scheduled interruptions to water service will occur?*

*6. In which of the following ways could [INSERT FACILITY BASED ON ZIP CODE] improve their notifications of scheduled service interruptions? You may select all that apply.*

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Detailed Findings - Overall

# Water Services – Improvements

Over half of the respondents (63%) had no suggestions on how to improve their water service, feeling it was *fine as is*.

Among the improvements suggested were *water filtration (improve taste/smell/color)* mentioned by 14% of customer. *Lower rates/don't increase rates* was mentioned by 14% of customers and especially among those within the Central US service area.

| Suggestions | 2009 Total | 2010 Results | | | | |
|---|---|---|---|---|---|---|
| | | 2010 Total | Central AZ | Southern AZ | Eastern AZ* | Central US |
| Water filtration (improve taste/smell/color) | 14% | 14% | 16% | 13% | N/A | 11% |
| Lower rates/don't increase rates | 11% | 14% | 11% | 11% | N/A | 22% |
| Improve water pressure | 7% | 4% | 2% | 6% | N/A | 3% |
| No suggestions/fine as is | 61% | 63% | 66% | 61% | N/A | 61% |

*NOTE: Data in orange shaded cell are significantly higher; data in gray shaded cells are significantly lower: at 95% confidence level.*

** Facilities in Eastern AZ provide Sewer/Waste Water service only.*

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*7. Do you have any suggestions on how [INSERT FACILITY BASED ON ZIP CODE] could improve their water services?*

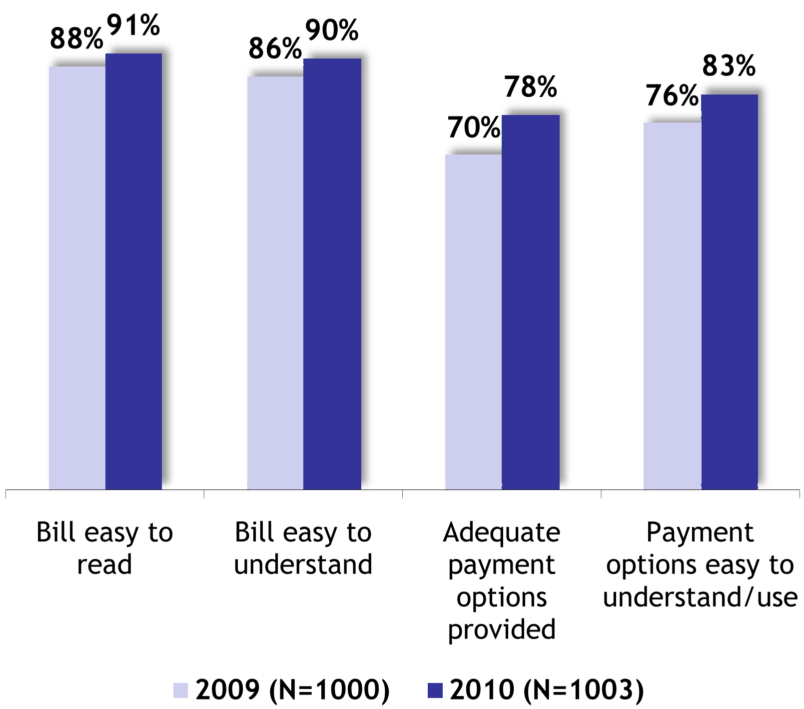
Detailed Findings - Overall

# Customer Billing - Satisfaction

Customer satisfaction with billing remained high with 78% or more of interviewed customers stating they somewhat or strongly agreed that they were satisfied with the customer billings received. All aspects of billing tested scored significantly higher as compared to 2009 results.

While Central and Southern AZ service areas received significantly higher satisfaction scores, Eastern AZ and Central US still received positive feedback with billing scores of 71% or higher.

**Top 2 Box Scores (4,5): 5 = Strongly Agree**




| | Central AZ | Southern AZ | Eastern AZ | Central US |
|---|---|---|---|---|
| Bill easy to read | 92% | 94% | 91% | 87% |
| Bill easy to understand | 92% | 95% | 87% | 86% |
| Adequate payment options provided | 82% | 87% | 73% | 71% |
| Payment options easy to understand/ use | 85% | 87% | 79% | 80% |

*NOTE: Data in orange shaded cell are significantly higher; data in gray shaded cells are significantly lower: at 95% confidence level.*

*8a-d. Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements.*

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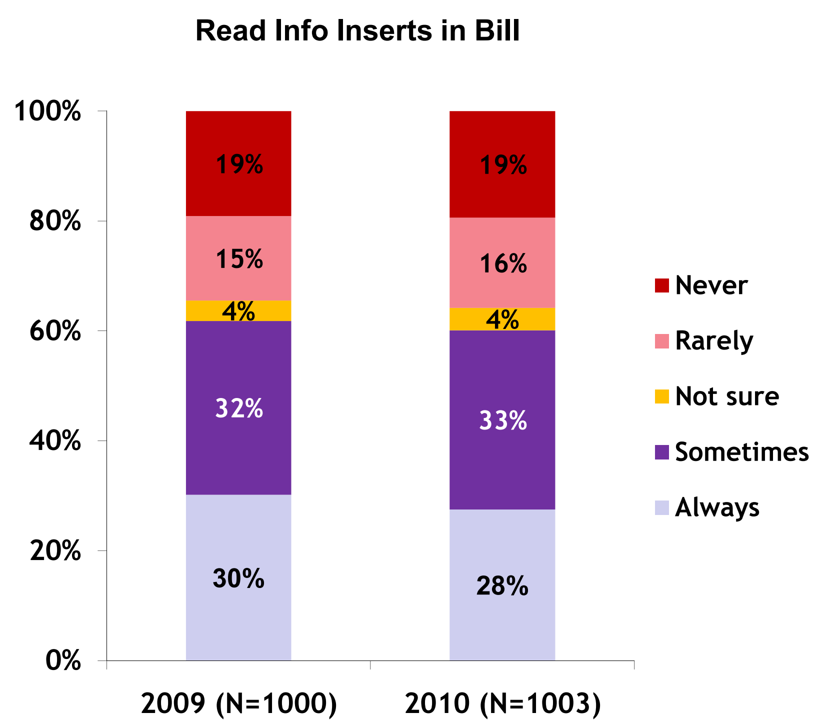
# Customer Billing – Information/Services

Almost two thirds of respondents (61%) stated they read the information inserts in their bill *sometimes* or *always*. These results were consistent with findings in 2009.




*9. How often do you read the informational inserts included in your bill?*

# Customer Billings – Improvements

When asked about suggestions to improve customer billings, the majority of respondents did not have any improvements and felt it was *fine as is* (82%).

*Lower rates/don't increase rates* was mentioned by 6%, specifically by those from Eastern AZ (12%) and Central US (8%) who tend to be most critical with their rates.

Comments regarding improvements related to online and automated payment options were significantly fewer (decrease of 6% points compared to 2009), presumably a reflection of changes and new services offered on the updated website.

| Suggestions for Improvements | 2009 | 2010 | Difference from 2009 (percent points) |
|---|---|---|---|
| Lower rates/Don't increase rates | 7% | 6% | -1 |
| Improve or implement electronic/online/paperless billing | 10% | 4% | -6 |
| Make bill easier to understand | 1% | 2% | +1 |
| No suggestions/fine as is | 74% | 82% | +8 |

*Mentions 2%+ shown

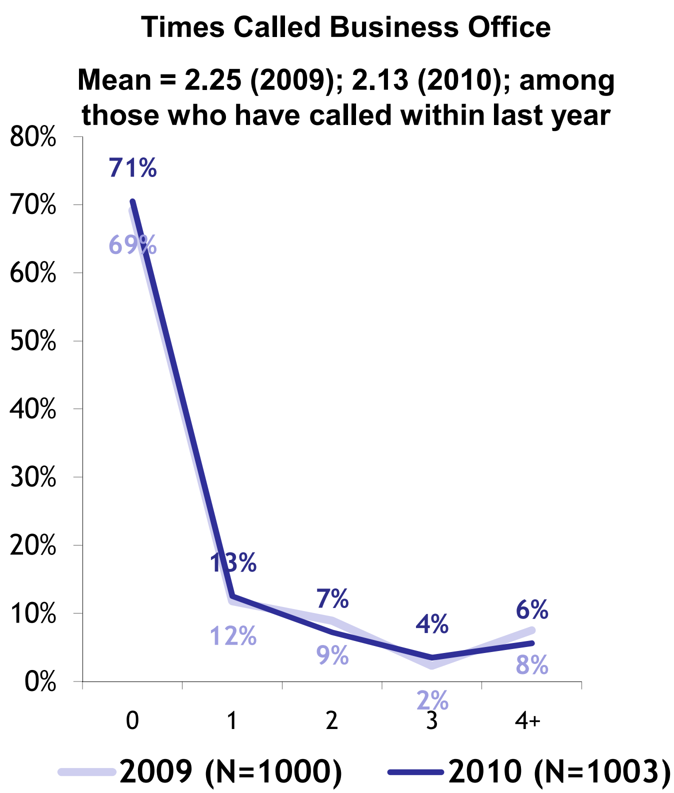
*NOTE: Data in orange shaded cell indicate a significant change/difference compared to 2009.*

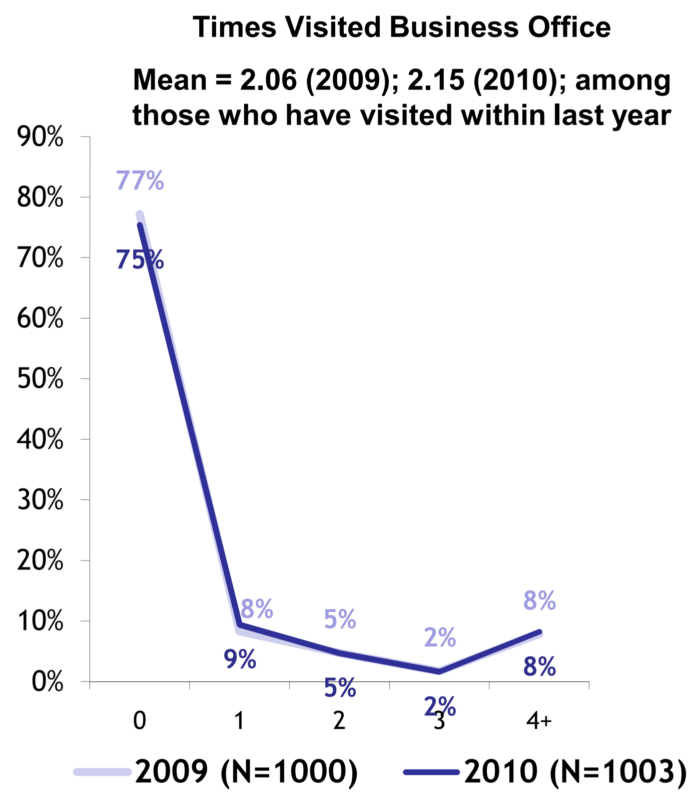
*11. Do you have any suggestions for improving the billing?*

# Customer Service – Calls & Visits

The majority of respondents did not have any customer service contact within the last year: 71% indicated they had not called and 75% stated they had not visited the business office.

Among those who had contact with customer service, the average number of calls and visits was about two within the last year (2.13 calls, 2.15 visits).



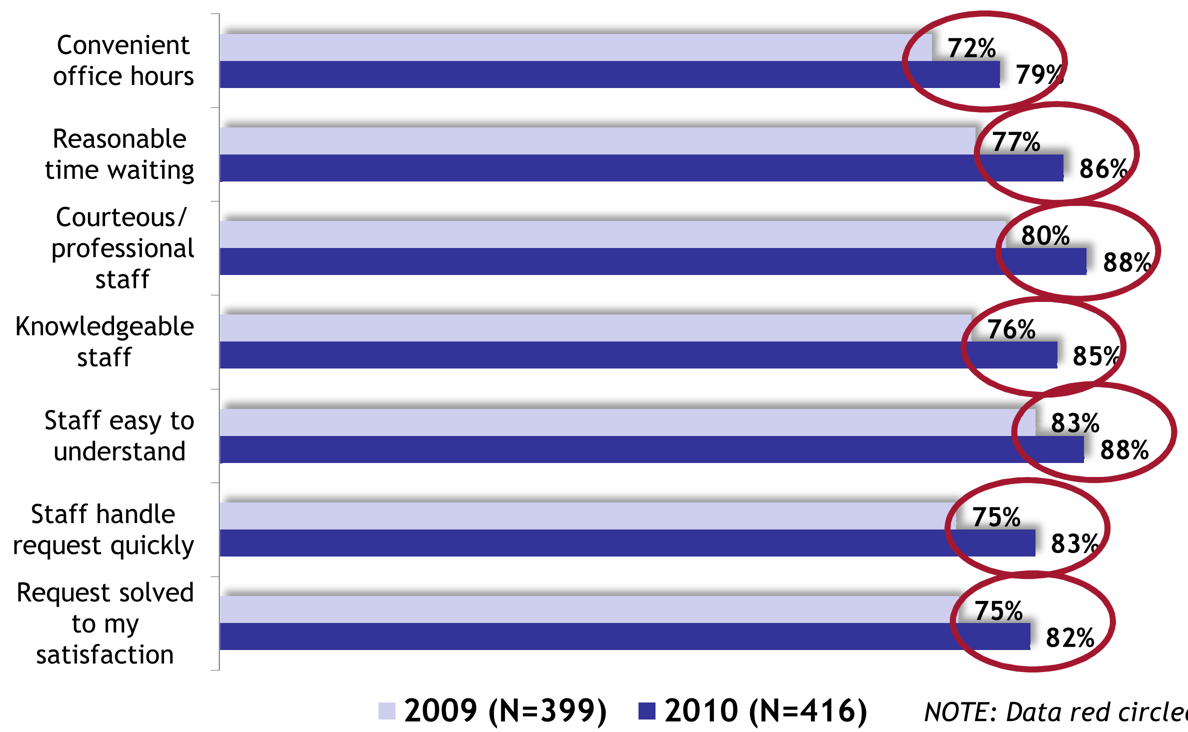

*11b. To the best of your recollection, how many times have you called or visited the [INSERT FACILITY BASED ON ZIP CODE] business office within the last year?*

# Customer Service - Satisfaction

Among those customer who reported they had contact with customer service in the last year, satisfaction was strong and significantly higher than the 2009 scores across all aspects tested.

Eastern AZ continued to have the lowest levels of agreement/satisfaction with customer service. While about two thirds of these customers were satisfied, their agreement levels were significantly lower for *convenient office hours* (67%), *staff handle request quickly* (71%) and *request solved to my satisfaction* (65%).

**Top 2 Box Scores (4,5): 5 = Strongly Agree**




*NOTE: Data red circled indicates significant change/ difference compared to 2009.*

*12a. Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements about [INSERT FACILITY BASED ON ZIP CODE]'s customer service. If you have called or visited the office more than once in the last year, please think only about your last contact with the [INSERT FACILITY BASED ON ZIP CODE] business office.*

Detailed Findings - Overall

# Customer Service – Hours & Wait Time

Customers who did not agree strongly that the office hours were convenient were asked what they felt would be more convenient hours. Longer weekday hours and office hours on Saturdays were suggested; *keeping the office open late - past 5PM* was mentioned by 27%, down 5% from 2009, followed by *Saturday hours - full or half days* (7%) and *opening early during the week – before 8AM* (4%). Compared to 2009, fewer suggestions regarding better office hours were made and more customers indicated the current hours were fine.

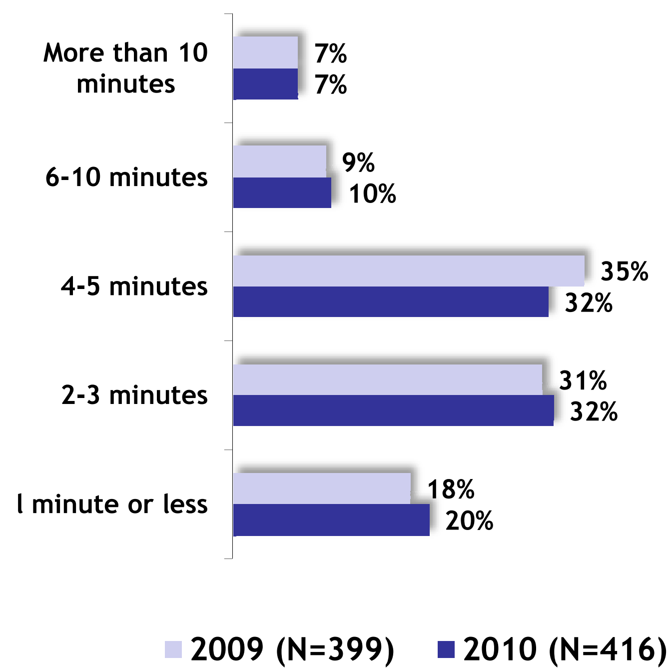
On average, respondents reported that an acceptable wait time for a live person was approximately three and a half minutes (mean of 3.69 minutes), a slight decrease from 2009 (3.86 minutes). With 84% of respondents feeling an acceptable wait time is no more than five minutes, Liberty Water should strive to keep wait times below this mark.

| More Convenient Time | 2009 (N=237) | 2010 (N=210) | Difference from 2009 (percent points) |
|---|---|---|---|
| Weekday hours: late open/past 5PM | 32% | 27% | -5 |
| Saturday hours: half/full day | 11% | 7% | -4 |
| Weekday hours: early open/before 8AM | 9% | 4% | -5 |
| Office hours are fine | 20% | 25% | +5 |

*NOTE: Data in orange shaded cell indicate a significant change/difference compared to 2009.*

**Acceptable Wait Time for Live Person**

**Mean = 3.86 minutes (2009); 3.69 minutes (2010)**




*12b. What would you consider more convenient office hours?*
*12c. How long are you willing to wait to speak to a live person?*

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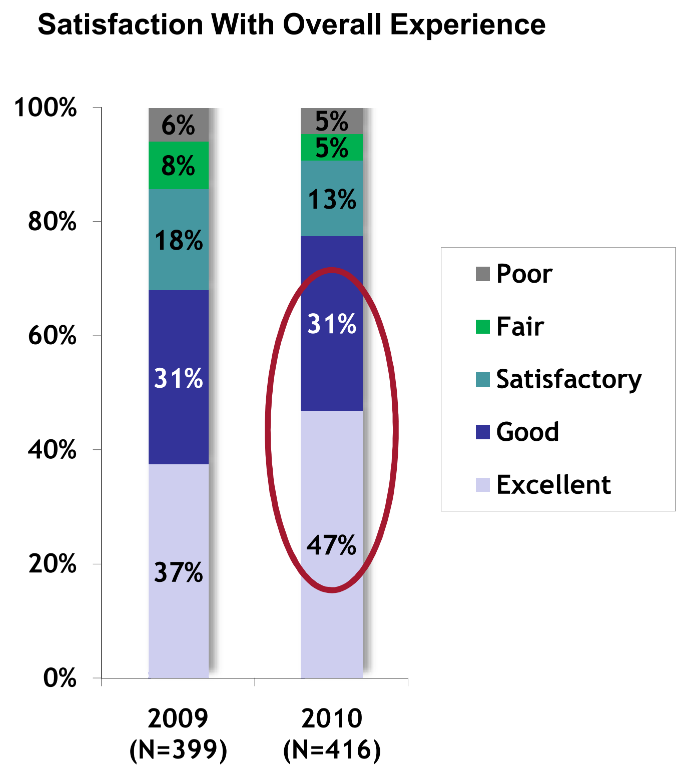
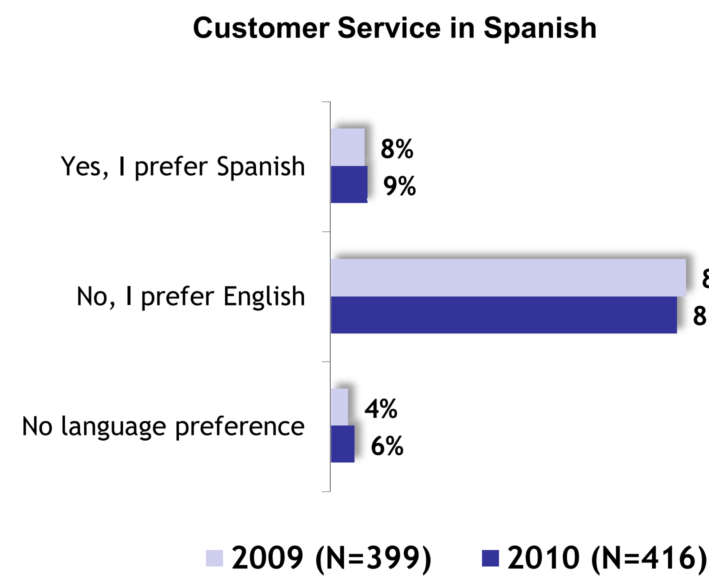
# Customer Services – Overall Experience

Slightly more than three fourths of respondents were satisfied with their overall customer service experience (78% *excellent/good*). This was a significant increase from 2009 (+10%) and was primarily driven by significantly higher satisfaction levels in Eastern AZ. Specifically, 71% of 2010 Eastern AZ respondents said their experience was *excellent* or *good* compared to 41% in 2009.

Respondents did not indicate a great need for customer service communications in Spanish, with only 9% stating they *prefer Spanish over English*. Southern AZ continued to be more interested in Spanish customer service interaction (17%).




*NOTE: Data red circled indicates significant change/ difference compared to 2009.*

*13. Overall, how would you rate your experience with the customer service you received? If you have called or visited the office more than once in the last year, please think only about your last contact with the [INSERT FACILITY BASED ON ZIP CODE] business office.*

*13a. If customer service were available in Spanish would you take advantage of it?*

# Customer Service - Improvements

Respondents had few suggestions on how to improve customer service; 84% had *no suggestion* (+7% from 2009) . The few comments given centered around communications for service shutoffs and being p*olite/friendly/ understanding.*

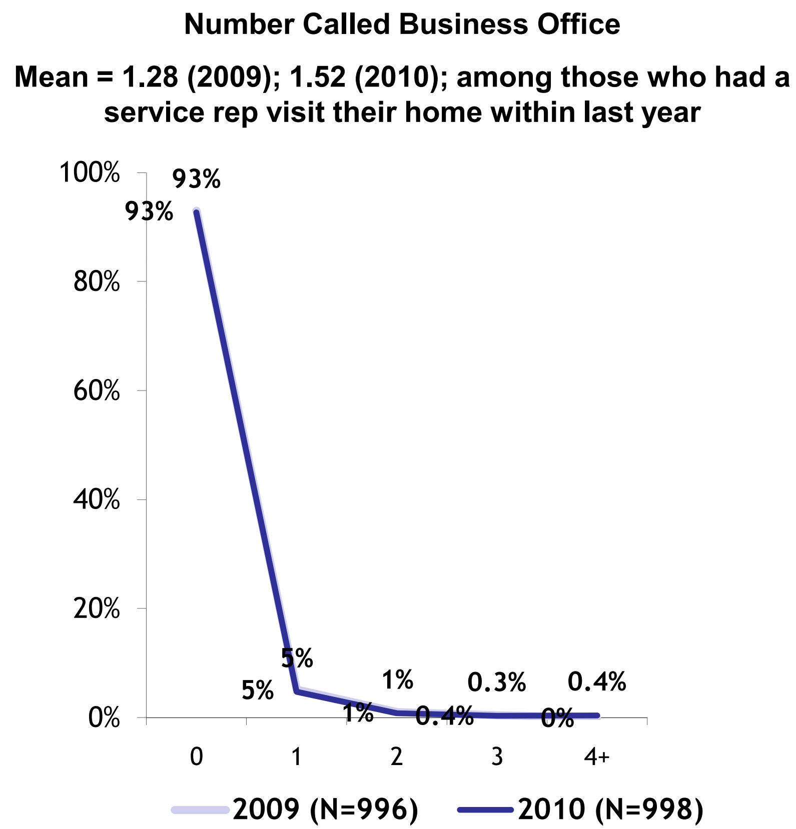
| Suggestions for Improvements | 2009 | 2010 | Difference from 2009 (percent points) |
|---|---|---|---|
| Improve communication w/customers (service follow-up, shutoffs, etc) | 2% | 3% | +1 |
| Be more polite/ friendly/ understanding | 5% | 3% | -2 |
| Speak English better/ English as a default language | 1% | 2% | +1 |
| Be more professional/ knowledgeable | 5% | 2% | -3 |
| No suggestions/fine as is | 77% | 84% | +7% |

*NOTE: Data in orange shaded cell indicate a significant change/difference compared to 2009.*

*14. Do you have any suggestions for improving customer service?*

# Service Rep Home Visits

The vast majority of respondents had no service representative visit their home within the last year (93% none). Of those who had a representative visit, the average number of visits was 1.52 which was up slightly from 2009 (1.28 visits).

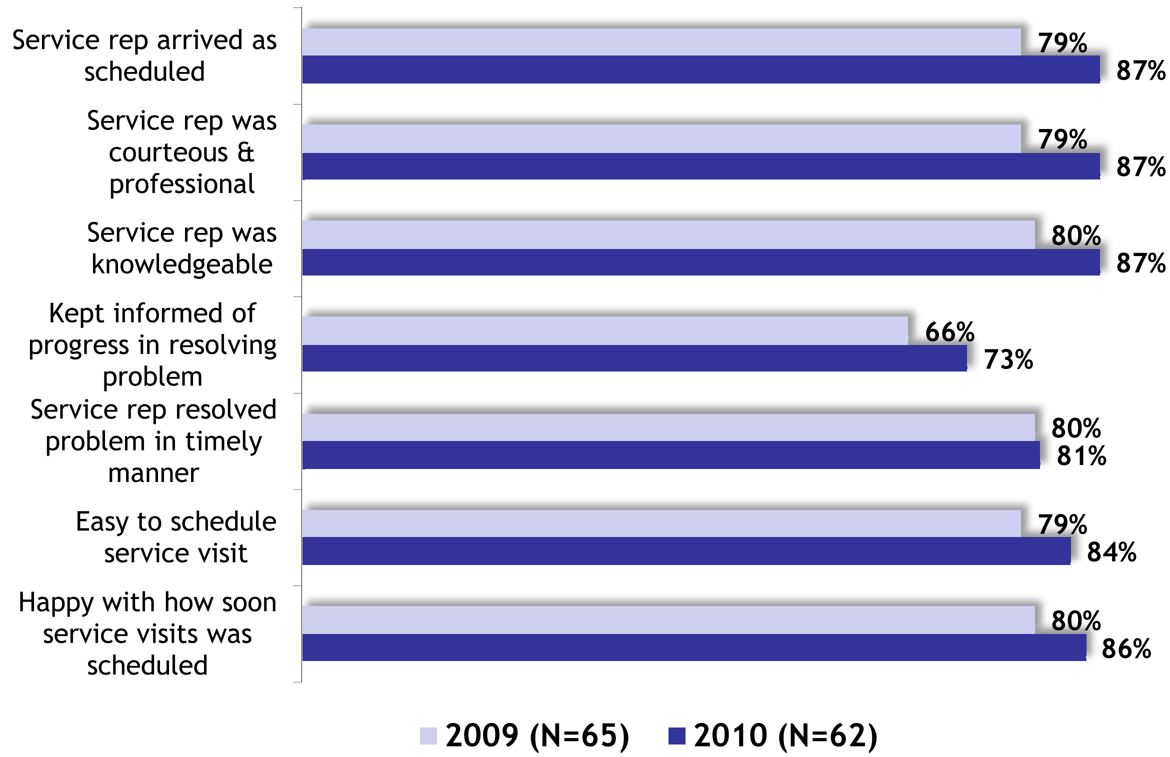



*14b. How many times has an [INSERT FACILITY BASED ON ZIP CODE] employee visited your home to resolve a problem within the last year?*

# Service Rep Home Visits - Satisfaction

Satisfaction with service representative home visits was very high on all aspects. While satisfaction was slightly up compared to 2009, this change was not significant.

**Top 2 Box Scores (4,5): 5 = Strongly Agree**



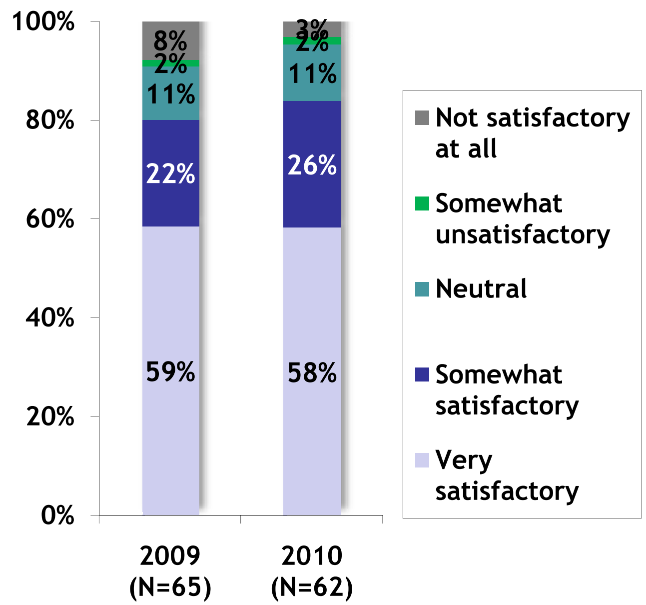

*15. Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements about your in home service visit. If an [INSERT FACILITY BASED ON ZIP CODE] employee has visited your home more than once within the last year, please think only about your last visit.*

# Service Rep Home Visits – Overall Satisfaction & Improvements

Overall satisfaction remained high, inching up from 81% of respondents stating they were *somewhat* or *very satisfied* in 2009 to 84% in 2010.

The majority of respondents did not have any suggestions for improvements (86%). The improvements that were mentioned were *resolve problems faster* (7%), *service personnel more knowledgeable* (5%) and *advance notification* (3%).

**Overall Satisfaction With Service Visit**




| Suggestions for Improvements | 2009 | 2010 | Difference from 2009 (percent points) |
|---|---|---|---|
| Resolve problems faster | 0% | 7% | +7% |
| Service personnel be more knowledgeable | 3% | 5% | +2% |
| Notification in advance when visit will be | 3% | 3% | 0% |
| No suggestions/fine as is | 86% | 86% | 0% |

*NOTE: Data in orange shaded cell indicate a significant change/difference compared to 2009.*

*16. Overall, how would you rate your experience with the service visit to your home using a 5-point scale with 5 being "Very Satisfactory" and 1 being "Not Satisfactory At All"? If you had more than one visit in the last year, please think only about your last visit.*

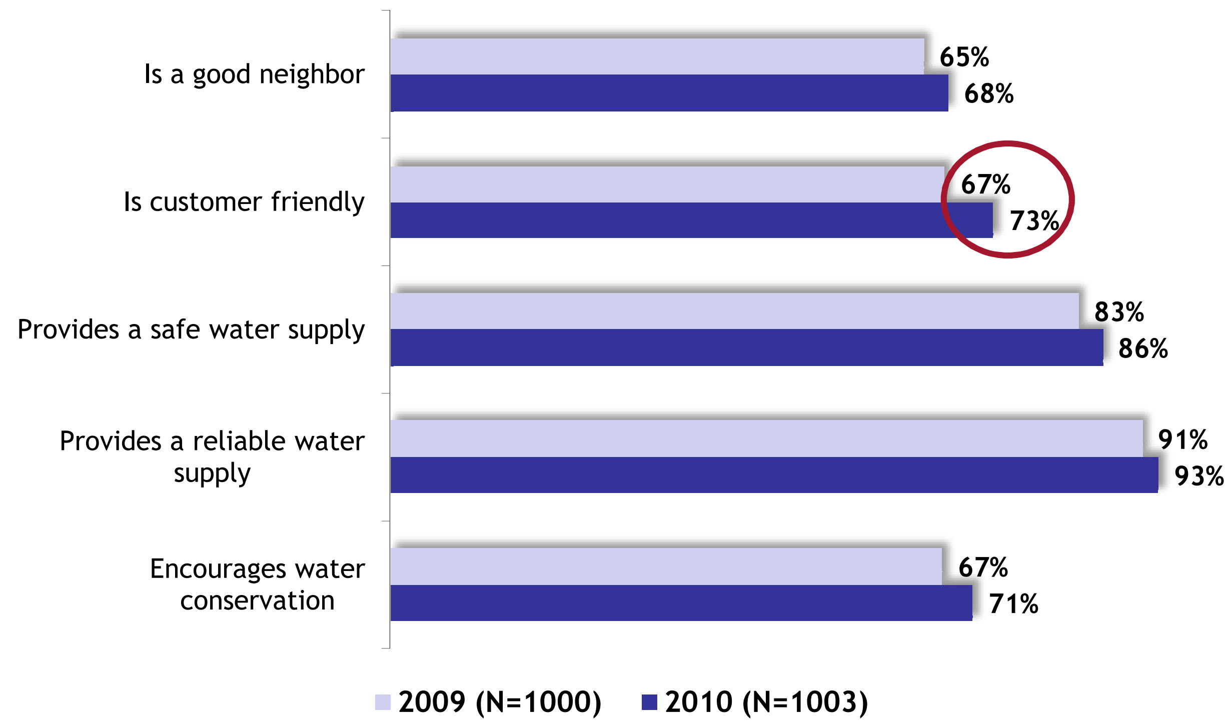
*17. Do you have any suggestions for improving home visits?*

Detailed Findings - Overall

# Company Evaluation - Satisfaction

Respondents agreed that their water service facility *provides a reliable water supply* (93%, top 2 box agree/strongly agree) followed by *provides a safe water supply* (86%). While all agreement scores were up compared to 2009, *is customer friendly* was significantly higher at 73% compared to 67% in 2009.

**Top 2 Box Scores (4,5): 5 = Strongly Agree**




*NOTE: Data red circled indicates significant change/ difference compared to 2009.*

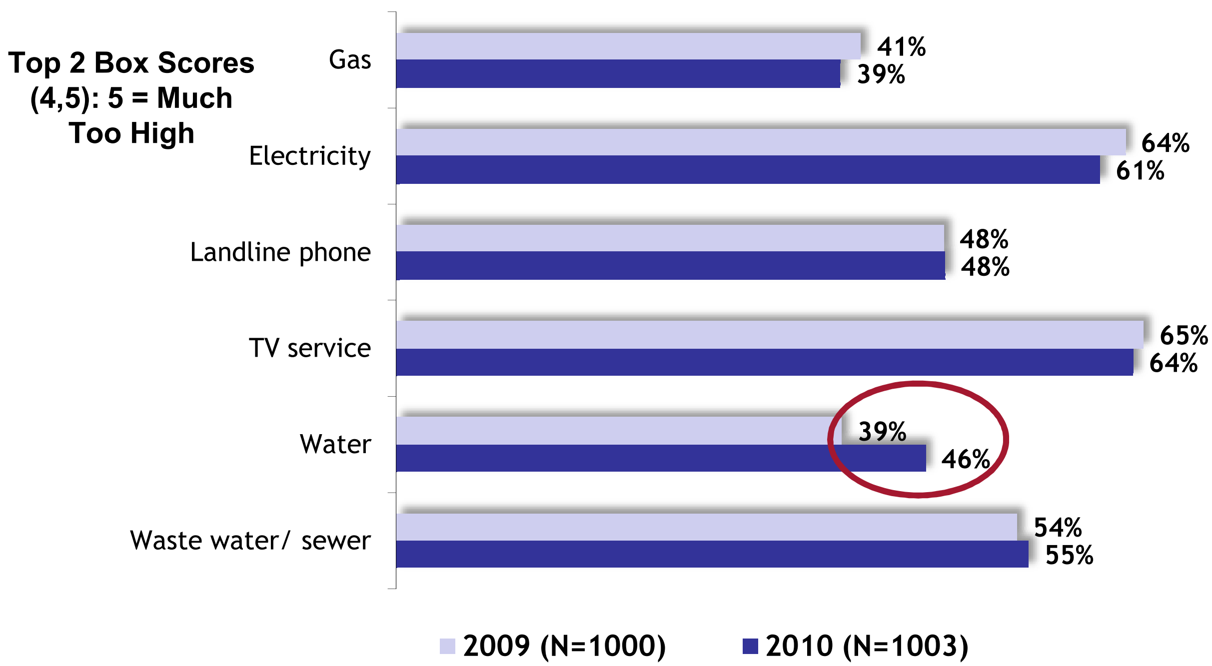
*18. Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements about [INSERT FACILITY BASED ON ZIP CODE].*

# Company Evaluation – Utility Rates

When comparing the perception of pricing for different utilities and services that respondents received, those considered *somewhat/much too high* continued to be *television* (64%), *electricity* (61%) and *waste water/sewer* (55%).

*Water* saw a significant jump from 39% to 46% of respondents considering their rate is too high. This increase was driven mainly by customers in the Central US service area (64%).

Central AZ respondents were most satisfied with their *waste water/ sewer* rates as only 34% stated the rates were *somewhat/much too high*.



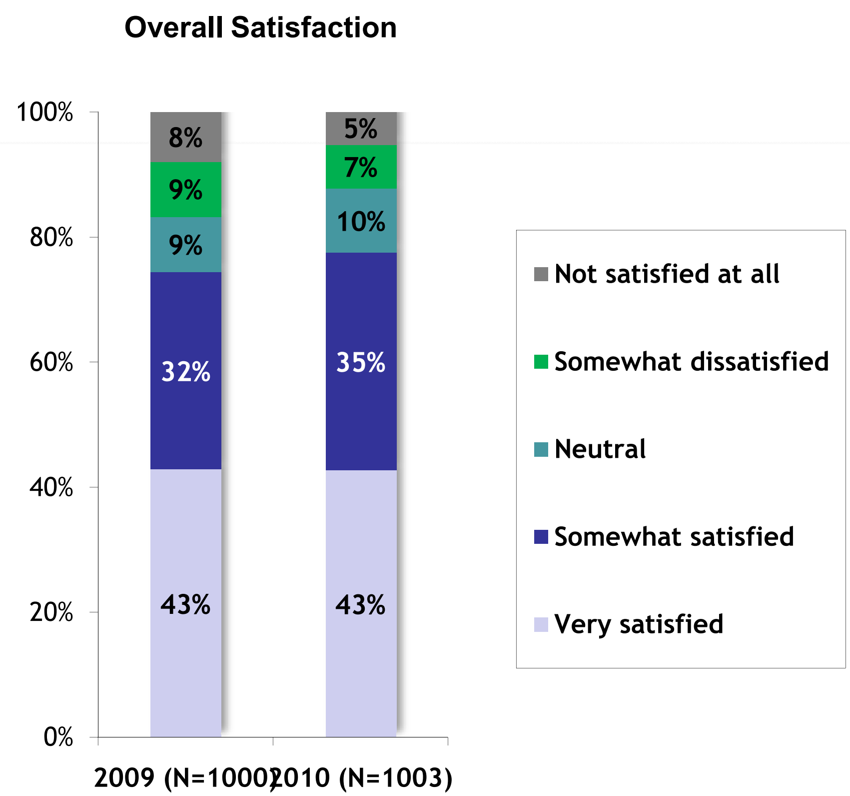

*NOTE: Data red circled indicates significant change/ difference compared to 2009.*

*19. For each of the following utility services, please indicate if you feel the rates charged are much too high, somewhat too high, just right, somewhat low, or very low.*

# Company Evaluation – Overall Satisfaction

Respondents were satisfied with their water/waste water provider overall, with 78% of respondents stating they were *somewhat/very satisfied* (+3% from 2009).

Eastern AZ was least satisfied (56%) with all other regions reporting top 2 box satisfaction scores of 78% or higher. However, Eastern AZ showed a significant increase in satisfaction, up 14% from 2009 (42% *somewhat/very satisfied*).




*20. Overall, how satisfied are you with [INSERT FACILITY BASED ON ZIP CODE]?*

Detailed Findings - Overall

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# Company Evaluation – Overall Satisfaction

Those *somewhat/very satisfied* with the provider were so because the *service is satisfactory/ good/ excellent* (10%), *good/friendly/courteous customer service* (8%) and *reliable/ receive services paid for/no service interruptions* (6%). However, 21% of respondents stated that they felt the *cost was too high;* mainly those somewhat satisfied and/or those from Eastern AZ and Central US (29% each).

Not surprisingly, *cost* (72%) was the main reason why respondents were dissatisfied (*not satisfied at all/somewhat dissatisfied*). Other negative comments were related to the water quality (10% *odor from sewer/sewage processing facility,* 6% *smell/taste of water* and 5% *water is cloudy/contaminated/poor quality/hard*) and customer service (6% *poor/unfriendly/uncaring customer service*).

| | 2009 | 2010 | Difference from 2009 (percent points) |
|---|---|---|---|
| **Why Satisfied** | N=743 | N=777 | |
| Cost is too high/ rate increases | 11% | 21% | +10 |
| Service is satisfactory/ good/ excellent | 14% | 10% | -4 |
| Good/ friendly/ courteous customer service | 8% | 8% | 0 |
| Reliable/ receive services paid for/ no service interruptions | 14% | 6% | -8 |
| Water quality is good | 6% | 4% | -2 |
| **Why Not Satisfied** | N=167 | N=124 | |
| Cost is too high/rate increases | 63% | 72% | +9 |
| Odor from sewer/sewage processing facility | 14% | 10% | -4 |
| Poor/unfriendly/uncaring customer service | 11% | 6% | -5 |
| Smell/taste of water | 4% | 6% | +2 |
| Water is cloudy/contaminated/poor quality/hard | 4% | 5% | +1 |

*NOTE: Data in orange shaded cell indicate a significant change/ difference compared to 2009.*

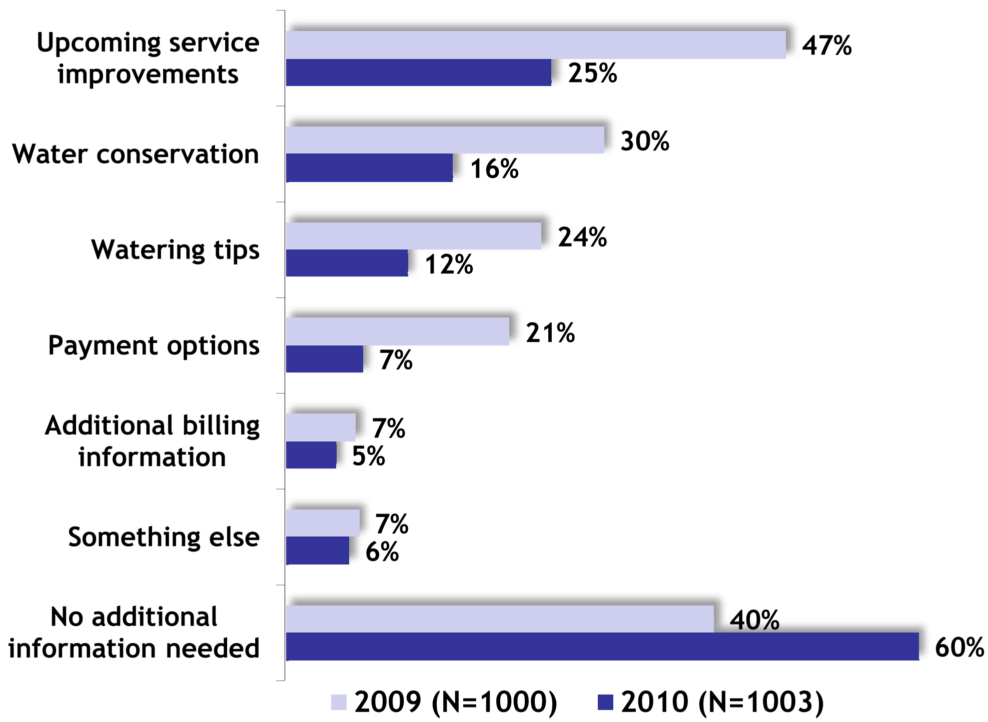
*20a. Being as specific as possible, why did you say you are [INSERT FROM Q20] with [INSERT FACILITY BASED ON ZIP CODE]?*

# Company Evaluation - Information

Respondents were asked if there was other information they would like to receive. *No additional information* was needed by 60% of respondents, up from 40% in 2009.

While of lower importance compared to 2009, information on *upcoming service improvements* was still the most desired (25%). *Water conversation* was of interest for 16% of respondents along with *watering tips* (12%).

**Other Information Like to Receive**




*21. What other information would you like to receive from [INSERT FACILITY BASED ON ZIP CODE]? You may select all that apply.*

Matt Garlick – Central AZ

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# Business Manager: Matt Garlick
# Central Arizona (LPSCO)

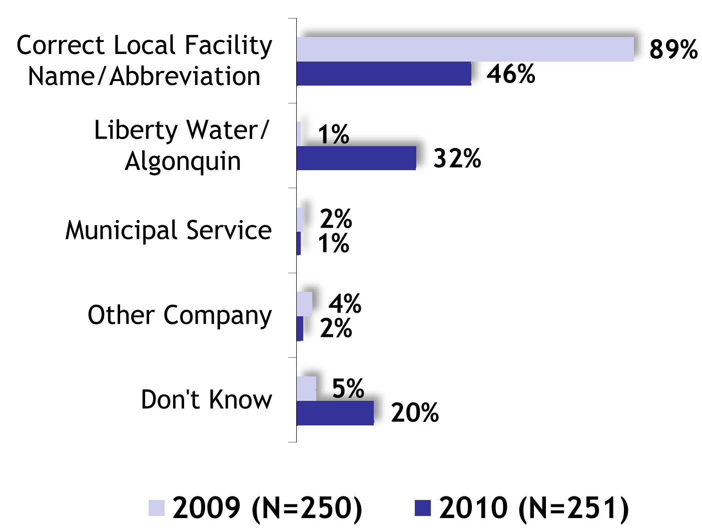
# Awareness & Perception

Familiarity with their water and waste water provider remained high. An obvious shift from the association with the local facility name to the newly branded Liberty Water name (32%) was noted.

When asked to describe the provider, most comments were positive (82%) and general with 79% respondents saying *good/like it*. Also mentioned was *good water quality* (5%, slightly down from 8% in 2009). While a few customers indicated the *cost is reasonable* (1%), this was mentioned significantly less compared to the previous year (6%).

Only 16% of respondents mentioned any negative comments: *Cost* (8%) was the leading reason for negative associations slightly up from 5%, followed closely by *water quality* (7% vs. 10% in 2009).

**Name of Water/Waste Water Provider**




| | 2009 | 2010 | Difference from 2009 (percent points) |
|---|---|---|---|
| **Positive Comments (NET)** | 83% | 82% | -1 |
| Positive general | 82% | 79% | -3 |
| Water quality | 8% | 5% | -3 |
| Customer service | 2% | 2% | 0 |
| Cost is reasonable | 6% | 1% | -5 |
| **Negative Comments (NET)** | 16% | 16% | 0 |
| Cost is too high | 5% | 8% | +3 |
| Water quality | 10% | 7% | -3 |
| Customer service | 2% | 1% | -1 |

*NOTE: Data in orange shaded cell indicate a significant change/difference compared to 2009.*

*A1. What is the name of the company that provides water and/or waste water service to your household/business?*

*A2. How would you describe your water and/or waste water service company and the services it provides?*

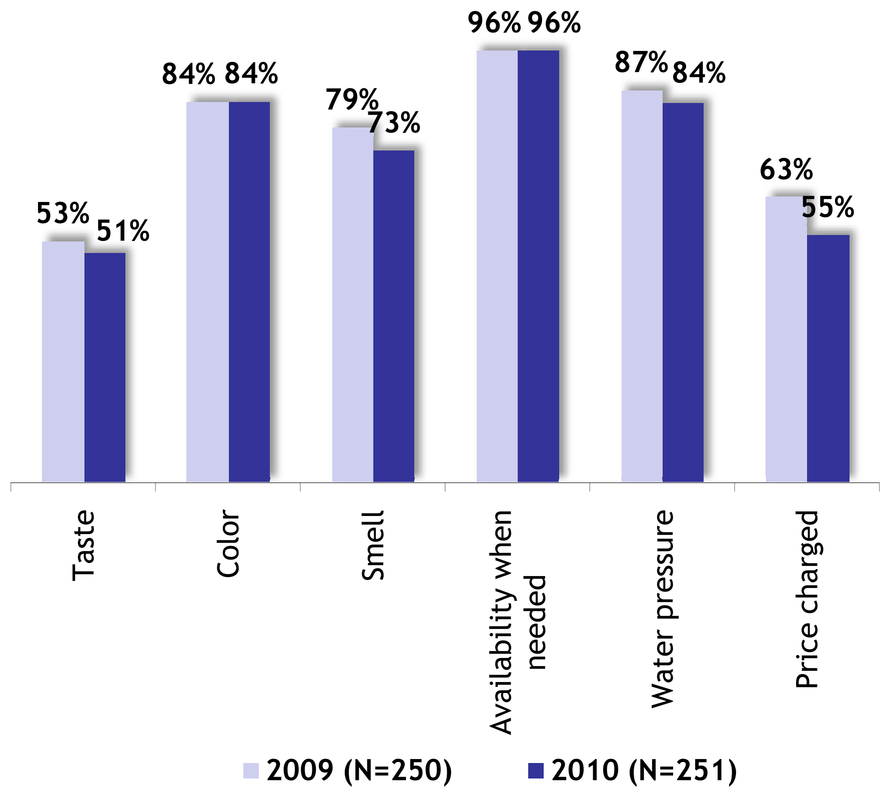
Matt Garlick – Central AZ

# Water Services - Satisfaction

Respondents generally rated the water services they received highly. *Availability when needed* received the highest top 2 box score (96%; 4/5, where 5 = very satisfactory) followed by *water pressure* (84%; slightly down compared to 2009) and *color* (84%).

*Taste of tap water* received the lowest score (51%). *Price charged* was slightly down compared to 2009.

**Top 2 Box Scores (4,5): 5 = Very Satisfactory**

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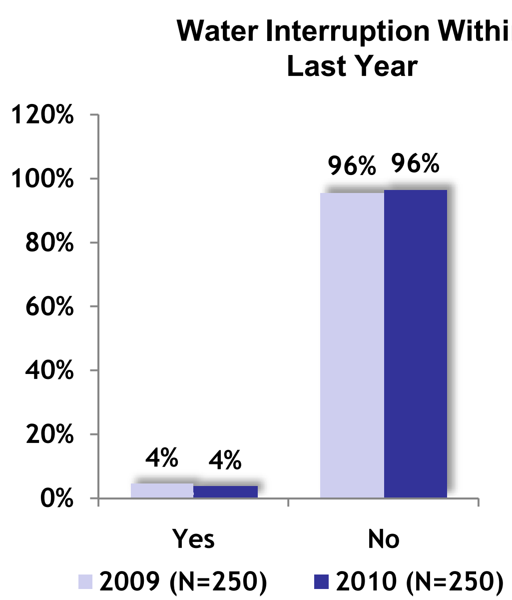
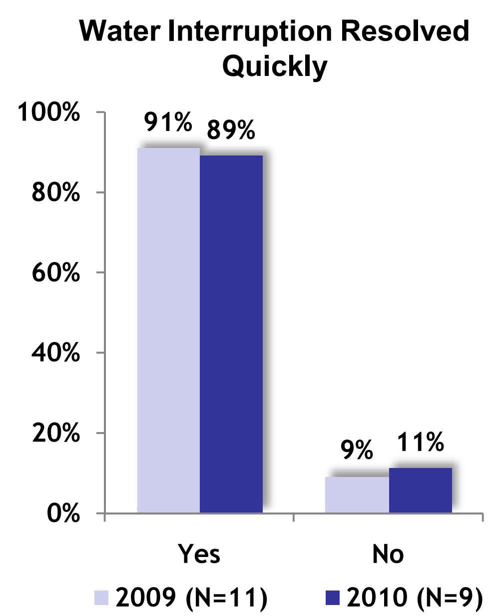
*1. Please rate your water services in the following areas by using a 5-point scale with 5 being "Very Satisfactory" and 1 being "Not Satisfactory At All".*

# Water Services - Interruptions

Only 4% of respondents had a water service interruption in the past year. Among these, 89% stated the interruption was resolved quickly. The only respondent who did not receive a quick resolution indicated they *simply took too long.*



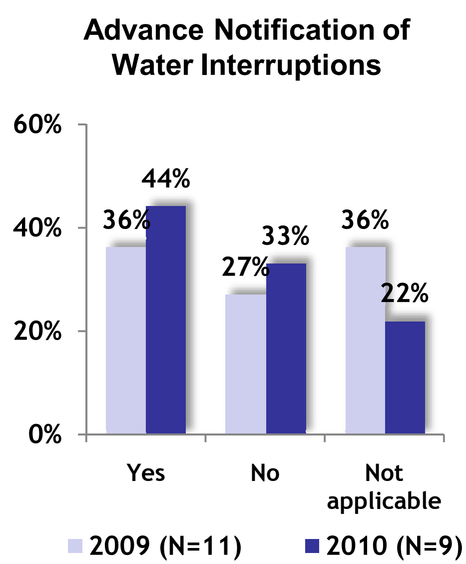

*2. Within the last year, have you had any interruptions to your water service?*
*3. Was your water service interruption problem resolved quickly?*
*4. Being as detailed as possible, please tell us how and why your water interruption problem was not resolved quickly.*

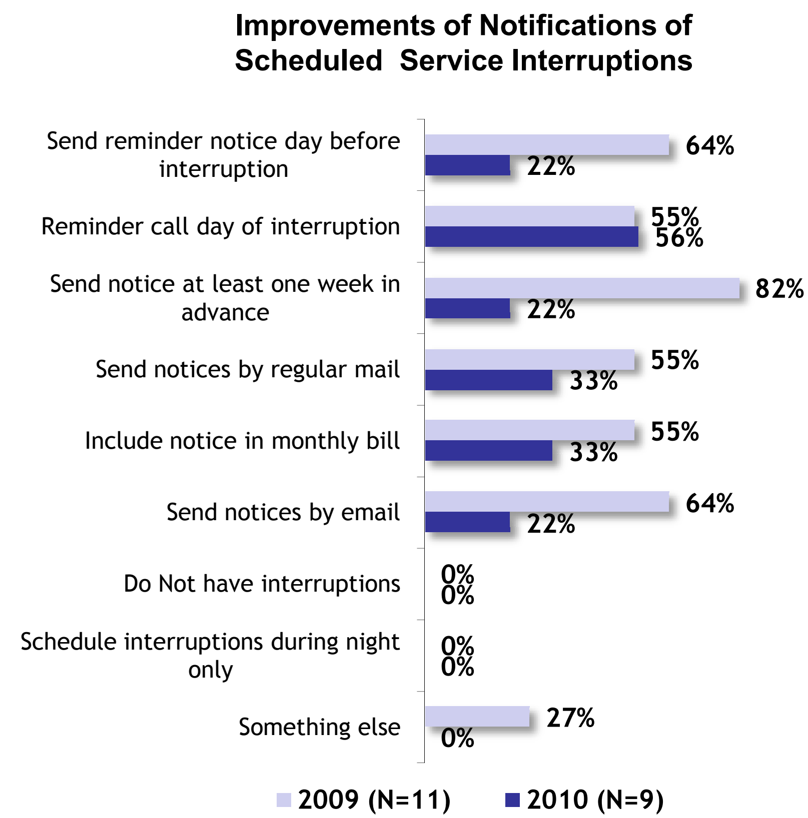
Matt Garlick – Central AZ

# Water Services – Interruptions Notification

Of the nine customers who had a water interruption in the last year four (44%) stated they received an advance notification of scheduled interruptions.

In terms of improvements for scheduled service interruptions, the top improvement requested was *reminder call day of interruption,* mentioned by five customers (56%).




*5. Are you notified in advance when scheduled interruptions to water service will occur?*

*6. In which of the following ways could [INSERT FACILITY BASED ON ZIP CODE] improve their notifications of scheduled service interruptions? You may select all that apply.*

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Matt Garlick – Central AZ

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# Water Services – Improvements

When asked about suggestions to improve the water service, 66% stated they had *no suggestions/fine as is*.

The few suggestions given included *water filtration (improve taste/smell/color)* mentioned by 16% of respondents, followed by *lower rates/don't increase rates* (11% up slightly from 6% in 2009).

| Suggestions for Improvements | 2009 (N=250) | 2010 (N=250) | Difference from 2009 (percent points) |
|---|---|---|---|
| Water filtration (improve taste/ smell/ color)/ soften water | 16% | 16% | 0 |
| Lower rates/ don't increase rates | 6% | 11% | +5 |
| Improve water pressure | 4% | 2% | -2 |
| Electronic/ online billing | 1% | 2% | +1 |
| Improve cold water temperature fluctuations | 3% | 2% | -1 |
| No suggestions/fine as is | 66% | 66% | 0 |

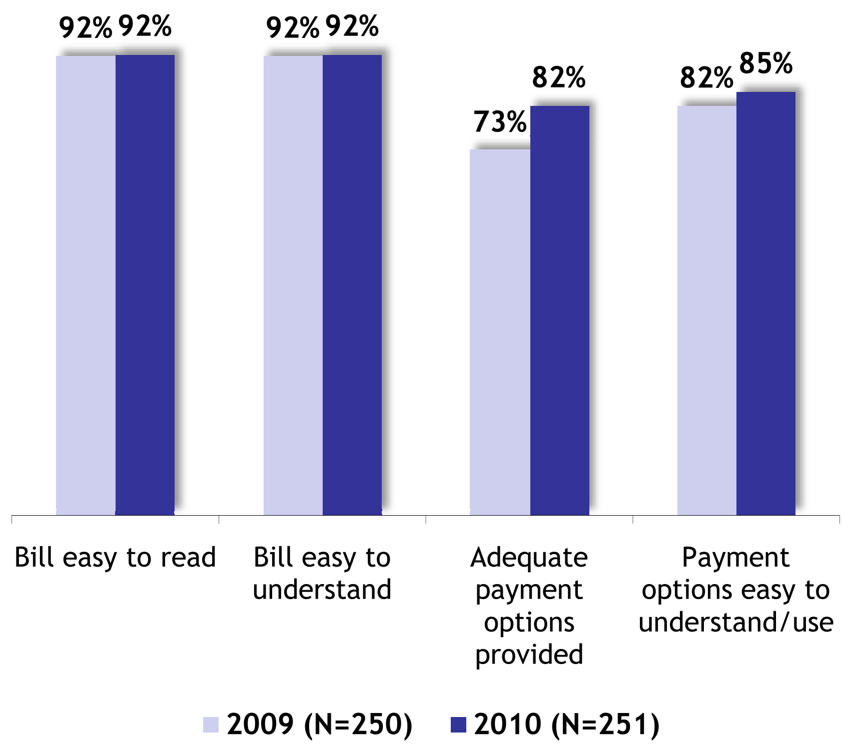
*7. Do you have any suggestions on how [INSERT FACILITY BASED ON ZIP CODE] could improve their water services?*

Matt Garlick – Central AZ

# Customer Billing - Satisfaction

The Central AZ facility received high satisfaction scores for their customer billing. Respondents agreed that the bill was both *easy to read* and *easy to understand* (Top 2 box = 92% each; agree/strongly agree). Scores for *adequate payment options provided* and *payment options easy to understand/use* both showed increases from 2009.

**Top 2 Box Scores (4,5): 5 = Strongly Agree**




*8a. Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements.*

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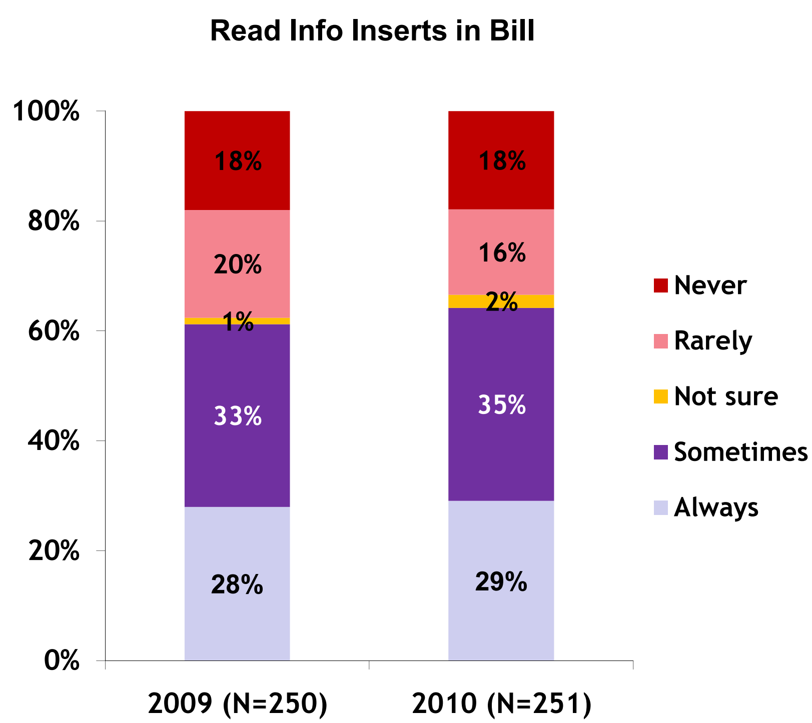
Matt Garlick – Central AZ

# Customer Billing – Information/Services

A total of 64% read information inserts included with their *bill sometimes/always* while 34% read the information *rarely/never*.




*9. How often do you read the informational inserts included in your bill?*

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# Customer Billings – Improvements

The majority (83%) of customers in the Central AZ service area did not have any suggestions on how to improve customer billing. *Electronic/online/paperless billing* was a key improvement suggestion during 2009 indicated by 13%.While was still heading the list of suggestions, it was mentioned by significantly fewer respondents (6% point drop to 7% of mentions).

| Suggestions for Improvements | 2009 (N=250) | 2010 (N=251) | Difference from 2009 (percent points) |
|---|---|---|---|
| Improve or implement electronic/online/paperless billing | 13% | 7% | -6 |
| Lower rates/don't increase rates | 2% | 2% | 0 |
| Eliminate inserts in billing envelope | 0.4% | 2% | +1.6 |
| Make bill easier to understand | 0 | 2% | +2 |
| No suggestions/fine as is | 76% | 83% | +7 |

*NOTE: Data in orange shaded cell indicate a significant change/difference compared to 2009.*

*11. Do you have any suggestions for improving the billing?*

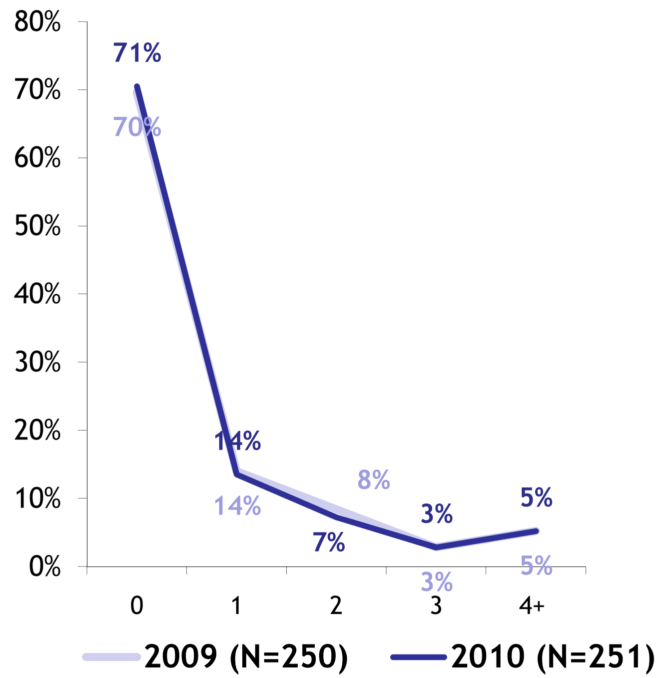
Matt Garlick – Central AZ

# Customer Service – Calls & Visits

The majority of respondents did not call (71%) or visit (79%) the business office within the last year. Respondents who had contacted the business office had both called or visited the office nearly twice, on average (2.03 calls and 1.93 visits).

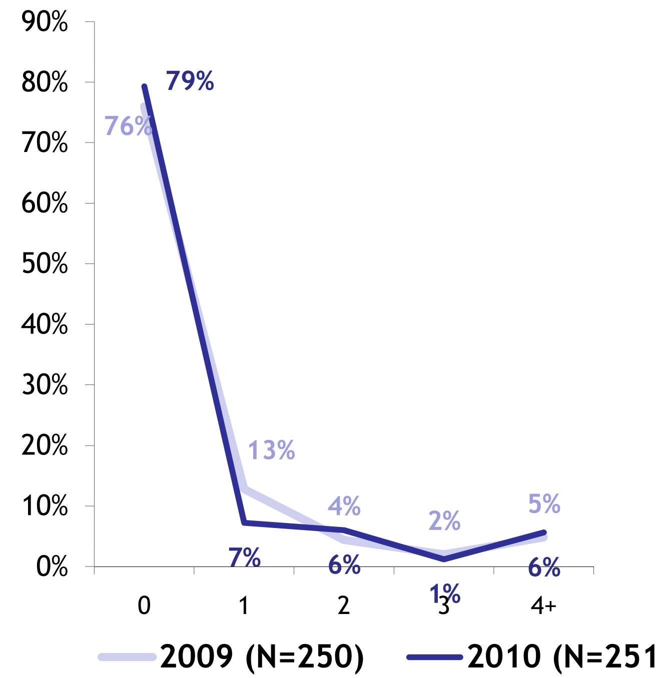
**Times Called Business Office**

**Mean = 1.97 (2009); 2.03 (2010); among those who have called within last year**




**Times Visited Business Office**

**Mean = 1.79 (2009); 1.93 (2010); among those who have visited within last year**

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*11b. To the best of your recollection, how many times have you called or visited the [INSERT FACILITY BASED ON ZIP CODE] business office within the last year?*

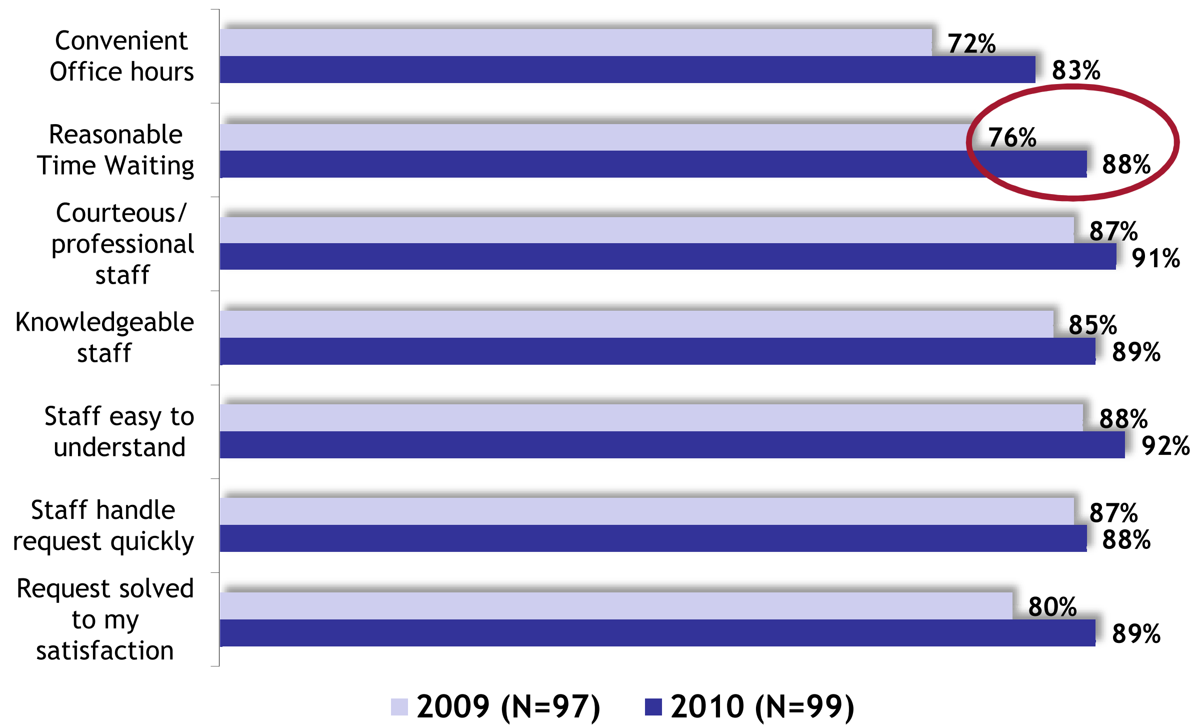
Matt Garlick – Central AZ

# Customer Service - Satisfaction

All aspects of customer service tested were rated very positively, with more than 70% of respondents reporting agreement (agree/strongly agree) that customer service was performed well.

The two service aspects that scored somewhat low in 2009 (*convenient office hours 72%* and *reasonable time waiting to speak to a representative* 76%) received much higher scores in 2010 (83% and 88%, respectively).

**Top 2 Box Scores (4,5): 5 = Strongly Agree**




*NOTE: Data red circled indicates significant change/ difference compared to 2009.*

*12a. Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements about [INSERT FACILITY BASED ON ZIP CODE]'s customer service. If you have called or visited the office more than once in the last year, please think only about your last contact with the [INSERT FACILITY BASED ON ZIP CODE] business office.*

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Matt Garlick – Central AZ

# Customer Service – Hours & Wait Time

When asked about more convenient office hours, a fourth of customers felt that *office hours are fine* (24%, up from 13% in 2009). One in five (21%) stated *late office hours during the week* would be desirable, down compared to 2009 when 45% requested this.

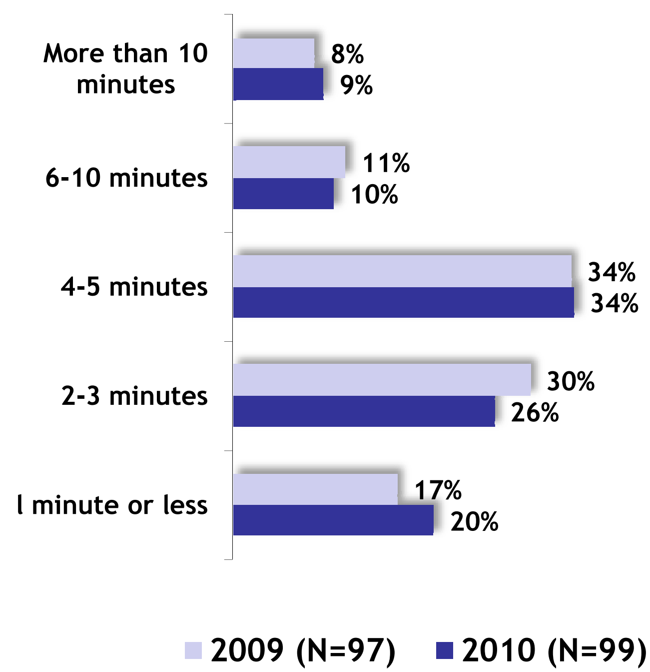
In terms of wait time for a live person, 46% felt that wait time should not be more than 3 minutes.

| More Convenient Time | 2009 (N=60) | 2010 (N=42) | Difference from 2009 (percent points) |
|---|---|---|---|
| Weekday hours: late open/past 5PM | 45% | 21% | -24 |
| Saturday hours: half/full day | 10% | 7% | -3 |
| Weekday hours: early open/before 8AM | 13% | 0% | -13 |
| Office hours are fine | 13% | 24% | +11 |

*NOTE: Data in orange shaded cell indicate a significant change/difference compared to 2009.*

**Acceptable Wait Time for Live Person**

**Mean = 4.00 minutes (2009); 3.79 minutes (2010)**




*12b. What would you consider more convenient office hours?*
*12c. How long are you willing to wait to speak to a live person?*

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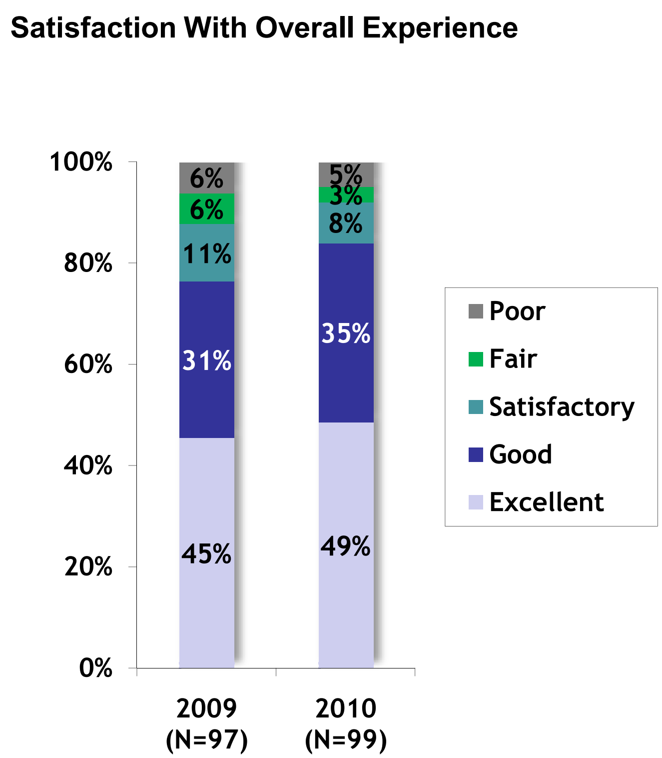
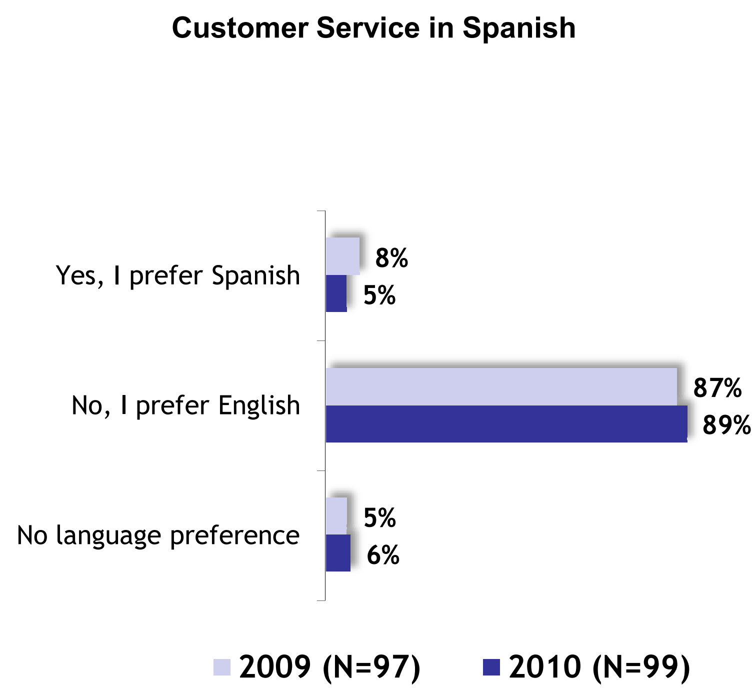
# Customer Services – Overall Experience

Overall customer service experience was rated high with 84% of respondents stating it was *excellent* or *good.* This was slightly up from the 76% received in 2009.

Only a small number of respondents preferred customer service communications in Spanish (5%).




*13. Overall, how would you rate your experience with the customer service you received? If you have called or visited the office more than once in the last year, please think only about your last contact with the [INSERT FACILITY BASED ON ZIP CODE] business office.*

*13a. If customer service were available in Spanish would you take advantage of it?*

# Customer Service - Improvements

Similar to 2009, few suggestions were given on how to improve customer service as most said *no suggestions/fine as is* (86%). Improvement suggestions related to staff communications: *be more polite/friendly/understanding staff* (3%, down slightly from 2009), *speak English better* (3%) and *be more professional/ knowledgeable* (3%).

Not surprisingly, *increase online services* (1%) saw a drop compared to 2009.

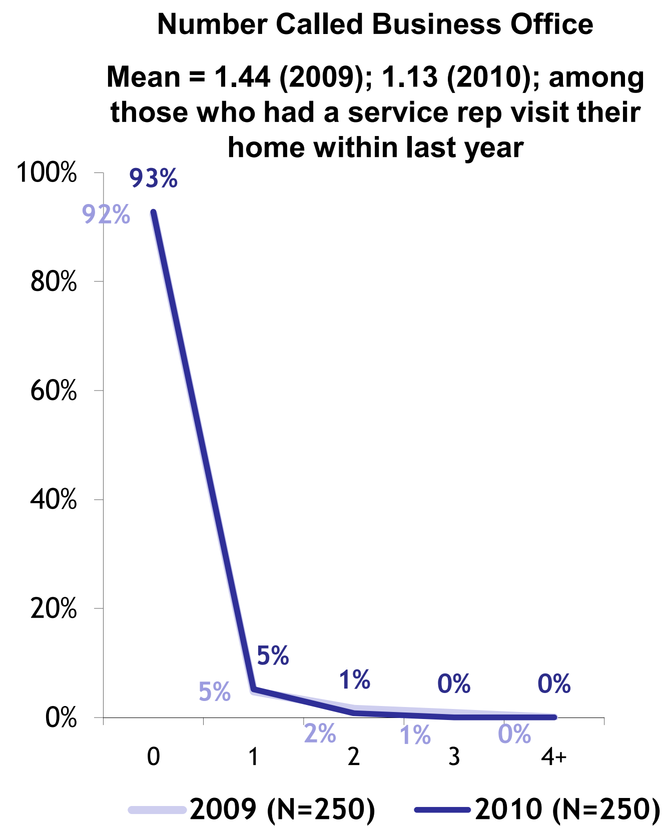
| Suggestions for Improvements | 2009 (N=97) | 2010 (N=99) | Difference from 2009 (percent points) |
|---|---|---|---|
| Be more polite/ friendly/ understanding | 5% | 3% | -2 |
| Speak English better/English as a default language | 3% | 3% | 0 |
| Be more professional/ knowledgeable | 1% | 3% | +2 |
| Improve communication w/customers (service follow-up, shut offs, etc) | 3% | 2% | -1 |
| Increase online services | 4% | 1% | -3 |
| No suggestions/fine as is | 77% | 86% | +9 |

*14. Do you have any suggestions for improving customer service?*

Matt Garlick – Central AZ

# Service Rep Home Visits

Very few customers reported receiving a service representative home visit within the last year (7% = 15 respondents). Among those who had received a home visit, the average number was 1.13 times within the year.

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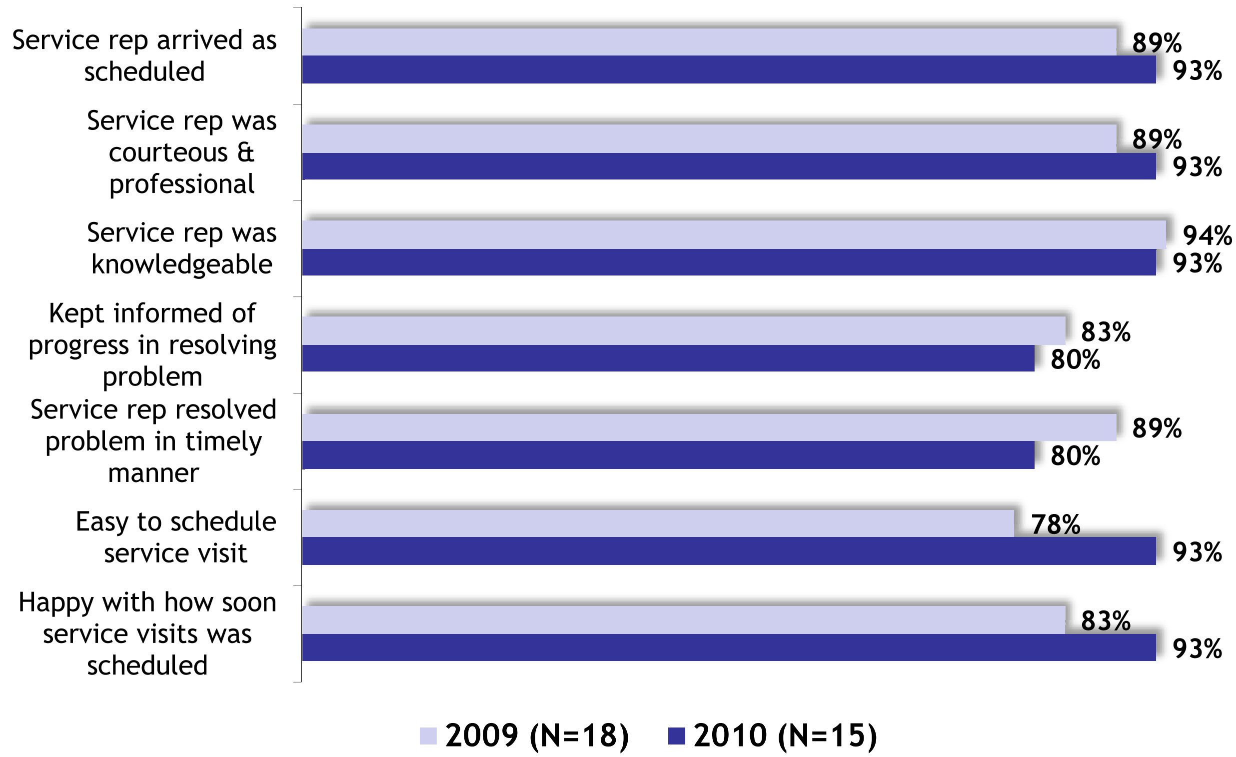
*14b. How many times has an [INSERT FACILITY BASED ON ZIP CODE] employee visited your home to resolve a problem within the last year?*

Matt Garlick – Central AZ

# Service Rep Home Visits - Satisfaction

Those who had a service representative visit reported a high level of satisfaction (agreement levels at 80% and above for agree/strongly agree) with all aspects of the visit.

**Top 2 Box Scores (4,5): 5 = Strongly Agree**




*15. Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements about your in home service visit. If an [INSERT FACILITY BASED ON ZIP CODE] employee has visited your home more than once within the last year, please think only about your last visit.*

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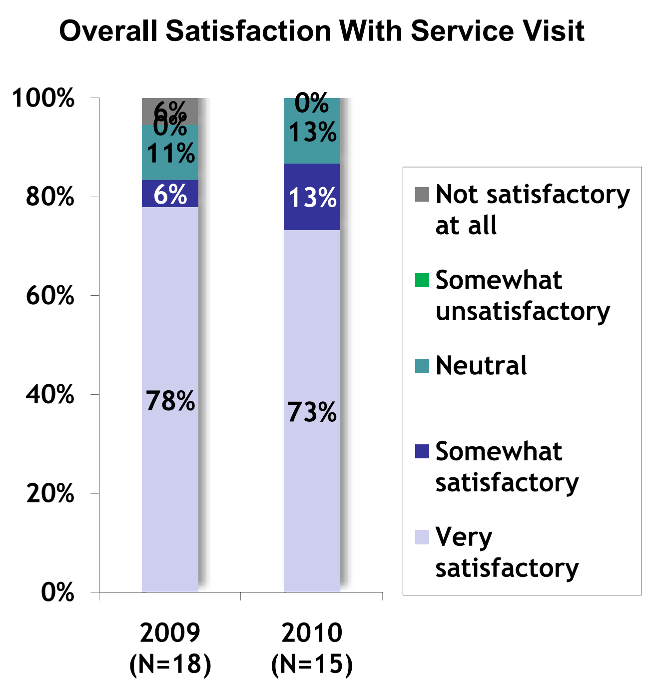
# Service Rep Home Visits – Overall Satisfaction & Improvements

Overall satisfaction was high with 86% of respondents stating they were *somewhat* or *very satisfied* with their experience with the service representatives home visit. This was slightly up from the 84% received in 2009.

The majority of these respondents (13 out of 15) had no suggestions for improvement.




| Suggestions for Improvements | 2009 (N=18) | 2010 (N=15) | Difference from 2009 (percent points) |
|---|---|---|---|
| Resolve problems faster | 0% | 7% | +7 |
| Service personnel be more knowledgeable | 0% | 7% | +7 |
| Notification in advance when visit will be | 6% | 7% | +1 |
| No suggestions/fine as is | 89% | 87% | -2 |

*16. Overall, how would you rate your experience with the service visit to your home using a 5-point scale with 5 being "Very Satisfactory" and 1 being "Not Satisfactory At All"? If you had more than one visit in the last year, please think only about your last visit.*

*17. Do you have any suggestions for improving home visits?*

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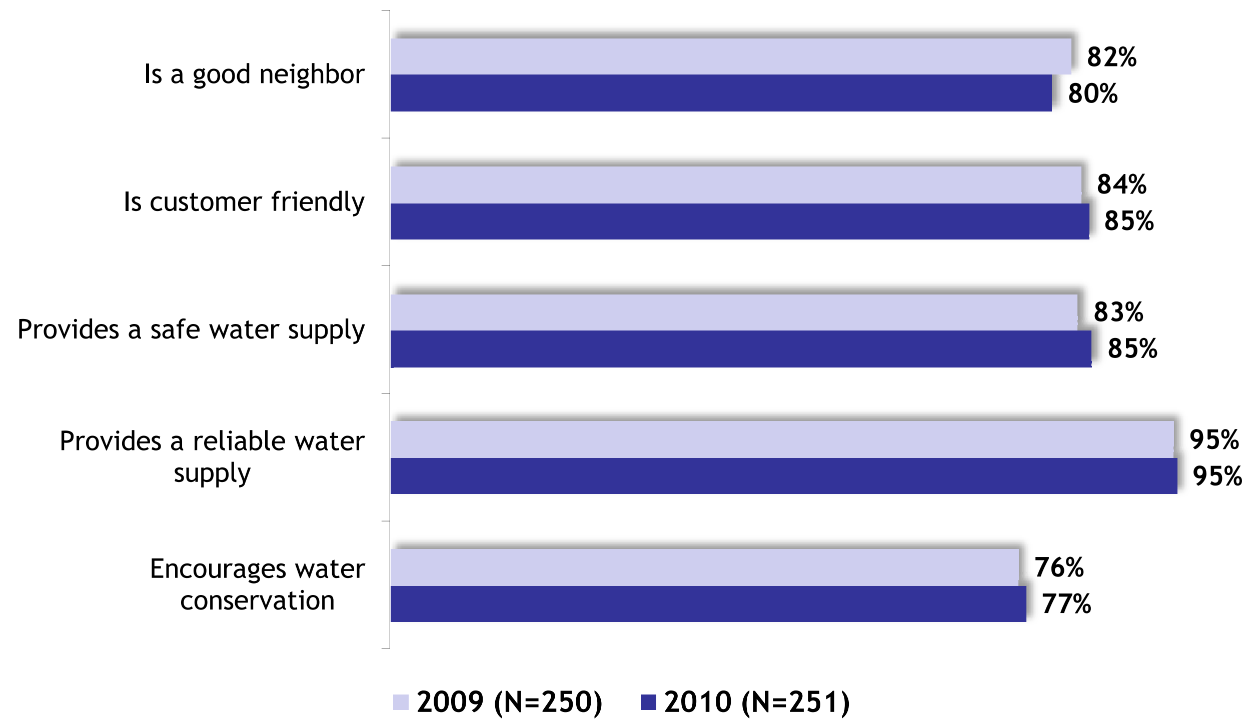
# Company Evaluation - Satisfaction

For the overall company evaluation, Central AZ received high scores on all tested areas and specifically on *provides a reliable water supply* (95%).

**Top 2 Box Scores (4,5): 5 = Strongly Agree**




*18. Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements about [INSERT FACILITY BASED ON ZIP CODE].*

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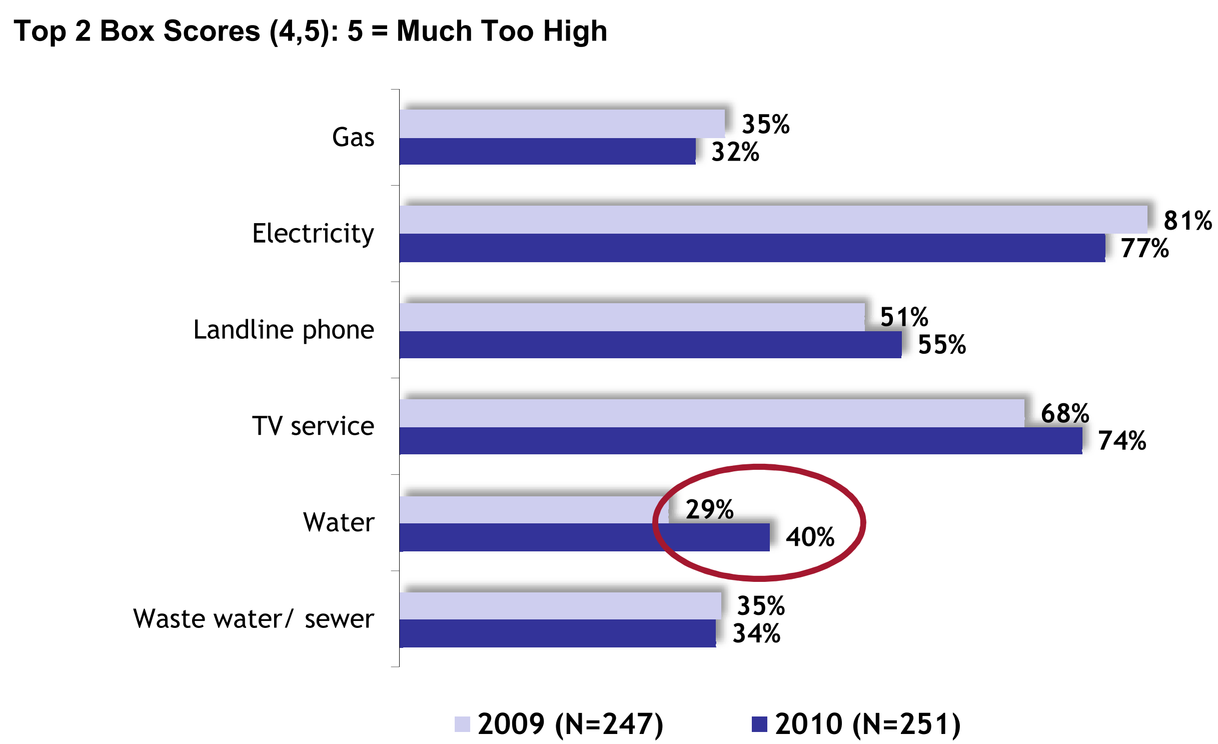
# Company Evaluation – Rates for Utilities

*Electricity* and *television service* remained the services respondents most felt were priced *high* or *much too high* (77% and 74%, respectively).

*Water* was considered expensive by 40%, a significant increase when compared to the 29% received in 2009.

*Waste water/sewer* rates were considered *somewhat* or *much too high* by 34% of respondents, this was similar to the 35% received in 2009.




*NOTE: Data red circled indicates significant change/ difference compared to 2009.*

*19. For each of the following utility services, please indicate if you feel the rates charged are much too high, somewhat too high, just right, somewhat low, or very low.*

Matt Garlick – Central AZ

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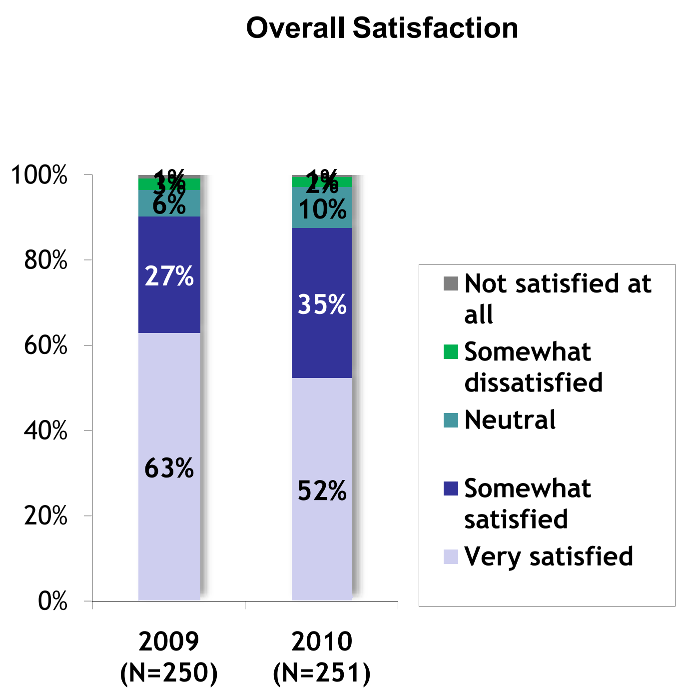
# Company Evaluation – Overall Satisfaction

The majority of respondents were *somewhat/very satisfied* with LPSCO (87% compared to 90% in 2009), the company providing water and waste water to them.

Only 3% of respondents were dissatisfied. The main reason for this was *cost is too high/ rate increases* mentioned by 38% (3 of the 8 respondents who were dissatisfied).




| | 2009 | 2010 | Difference from 2009 (percent points) |
|---|---|---|---|
| **Why Satisfied** | N=225 | N=219 | |
| Cost is too high/ rate increases | 6% | 14% | +8 |
| Good/ friendly/ courteous customer service | 5% | 10% | +5 |
| Service is satisfactory/ good/excellent | 14% | 7% | -7 |
| Water quality is good | 5% | 7% | +2 |
| Reliable/ receive services paid for/ no service interruptions | 20% | 6% | -14 |
| Water is cloudy/ contaminated/ poor quality/ hard | 4% | 6% | +2 |
| **Why Not Satisfied** | N=9 | N=8 | |
| Cost is too high/ rate increases | 0 | 38% | +38 |
| Water is cloudy/ contaminated/ poor quality/ hard | 0 | 13% | +13 |
| Poor/ unfriendly/ uncaring customer service | 44% | 13% | -31 |
| No cool/cold water | 11% | 13% | +2 |
| Billing is confusing/ unclear/ uninformative | 0 | 13% | +13 |

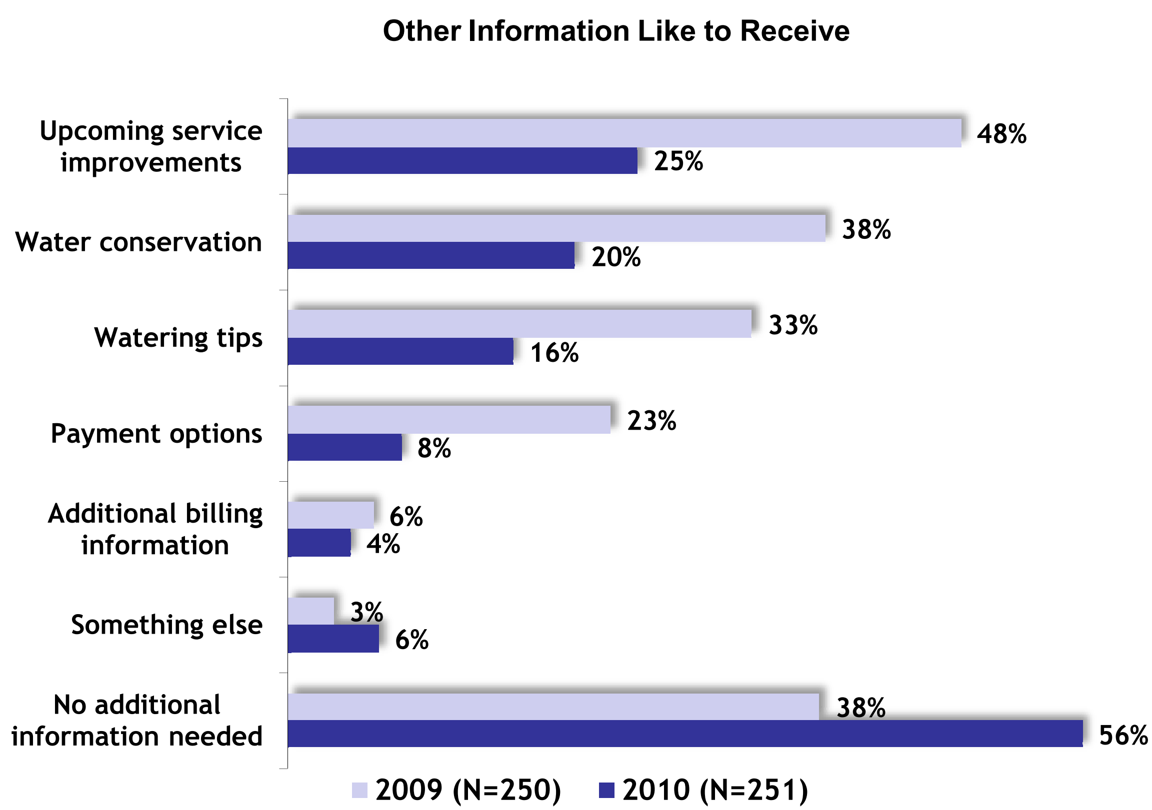
*20. Overall, how satisfied are you with [INSERT FACILITY BASED ON ZIP CODE]?*

*20a. Being as specific as possible, why did you say you are [INSERT FROM Q20] with [INSERT FACILITY BASED ON ZIP CODE]?*

Matt Garlick – Central AZ

# Company Evaluation - Information

In terms of additional information, most (56%) indicated they didn't need any. Those who requested other information stated they would like to receive information on *upcoming service improvements* (25%), *water conversation* (20%) and *watering tips* (16%).

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*21. What other information would you like to receive from [INSERT FACILITY BASED ON ZIP CODE]? You may select all that apply.*

Martin Garlant – Southern AZ

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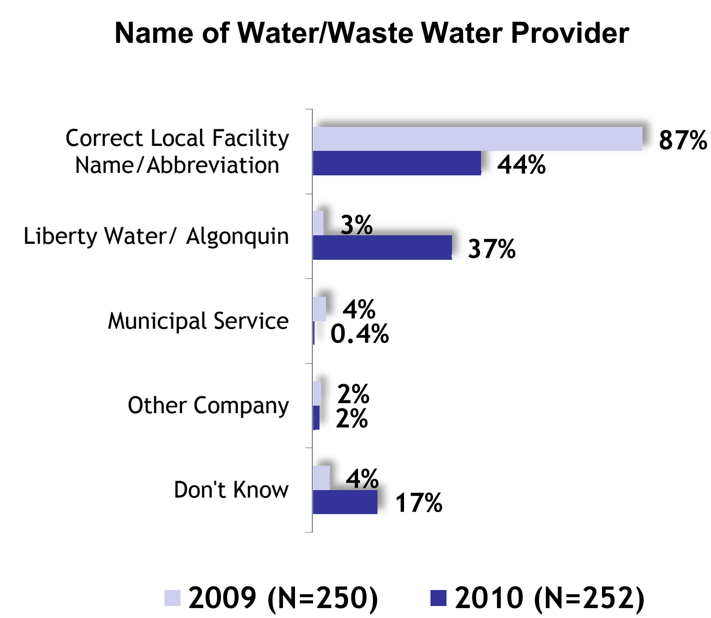
# Business Manager: Martin Garlant
# Southern Arizona (Bella Vista, Rio Rico, Northern Sunrise, Southern Sunrise)

# Awareness & Perception

Familiarity with the water and/or waste water provider remained high. An obvious shift from the association with the local facility name to the newly branded Liberty Water name (37%) was noted.

When asked to describe the provider, most comments were positive (78%) and general (75% *good/like it*). Another positive mention was *good water quality* (4%) which was down from 9% in 2009. Another significant decrease in positive association was *cost is reasonable* with only one customer mentioning it (0.4%) compared to 6% in 2009.

About one fourth of comments were negative (24%): 10% had complaints about *cost/expensive*, 8% about *poor water quality* and 4% about *customer service*.




| | 2009 | 2010 | Difference from 2009 (percent points) |
|---|---|---|---|
| **Positive Comments (NET)** | 77% | 78% | +1 |
| Positive general | 73% | 75% | +2 |
| Water quality | 9% | 4% | -5 |
| Customer service | 4% | 3% | -1 |
| Cost is reasonable | 6% | 0.4% | -5.6 |
| **Negative Comments (NET)** | 26% | 24% | -2 |
| Cost is too high | 10% | 10% | 0 |
| Water quality | 9% | 8% | -1 |
| Customer service | 4% | 4% | 0 |

*NOTE: Data in orange shaded cell indicate a significant change/difference compared to 2009.*

*A1. What is the name of the company that provides water and/or waste water service to your household/business?*

*A2. How would you describe your water and/or waste water service company and the services it provides?*

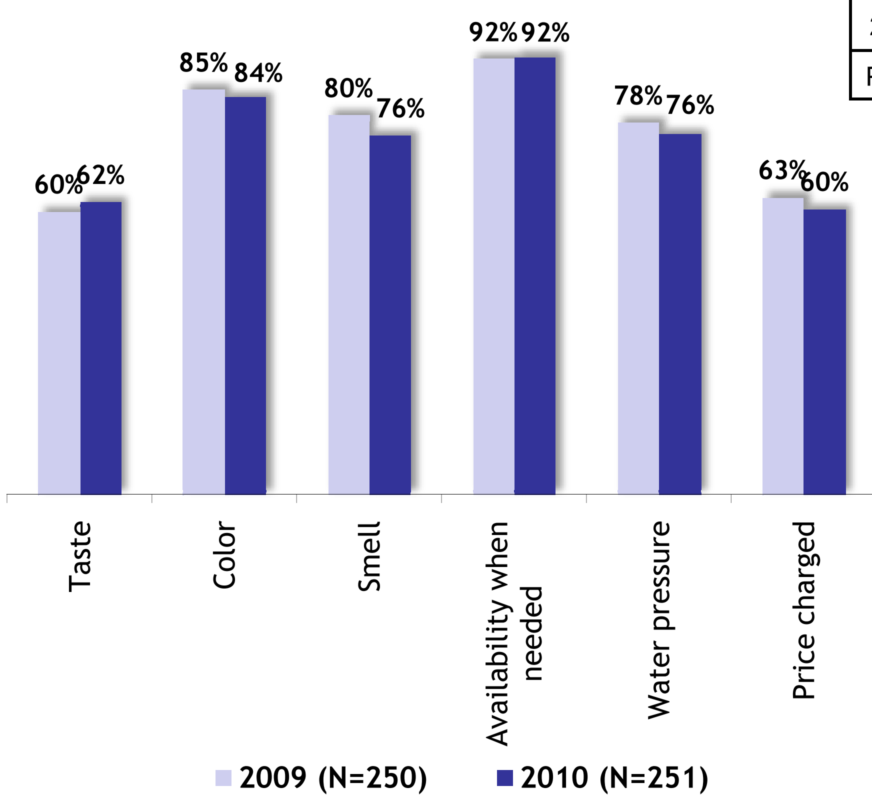
# Water Services - Satisfaction

Respondents rated the water services they received generally high. *Availability when needed* received the highest top 2 box score (92%; 4/5, where 5 = very satisfactory) followed by *color* (84%).

*Taste of tap water* (62%) and *price charged* (60%) received the lowest scores.

In terms of *price charged,* Bella Vista and Rio Rico tended to have more satisfied residents than those in the Southern Sunrise service area. This trend is consistent with 2009 findings.

**Top 2 Box Scores (4,5): 5 = Very Satisfactory**




| 2010 Results | Bella Vista | Rio Rico | Northern Sunrise | Southern Sunrise |
|---|---|---|---|---|
| Price charged | 83% | 63% | N/A* | 38% |

*Small sample size; only 1 customer from Northern Sunrise was included.

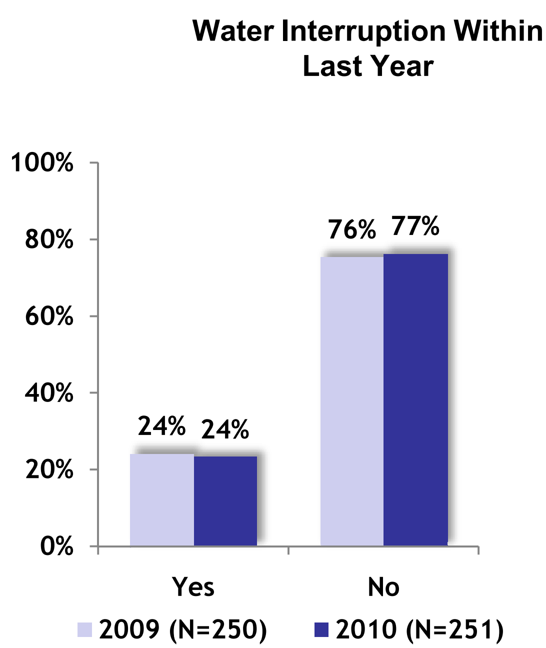
*NOTE: Data in orange shaded cell are significantly higher; data in gray shaded cells are significantly lower: at 95% confidence level.*

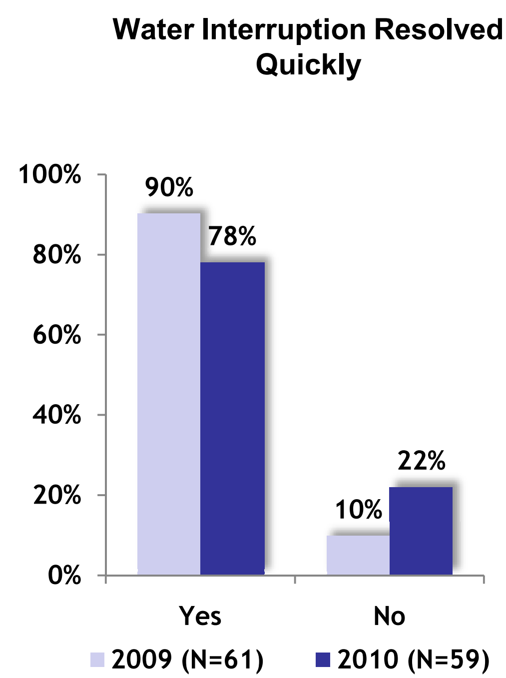
*1. Please rate your water services in the following areas by using a 5-point scale with 5 being "Very Satisfactory" and 1 being "Not Satisfactory At All".*

# Water Services - Interruptions

About one quarter of respondents (24%) had a water service interruption in the last year, similar to 2009. Among the interruptions, 78% of the interruptions were resolved quickly.

Respondents in the Southern Sunrise service area were most likely to have experienced water service interruptions.




| Significantly Higher: Water interruption |
|---|
| Southern Sunrise (45%) vs. Bella Vista (8%)/ Rio Rico (17%) |

*2. Within the last year, have you had any interruptions to your water service?*
*3. Was your water service interruption problem resolved quickly?*
*4. Being as detailed as possible, please tell us how and why your water interruption problem was not resolved quickly.*

Martin Garlant – Southern AZ

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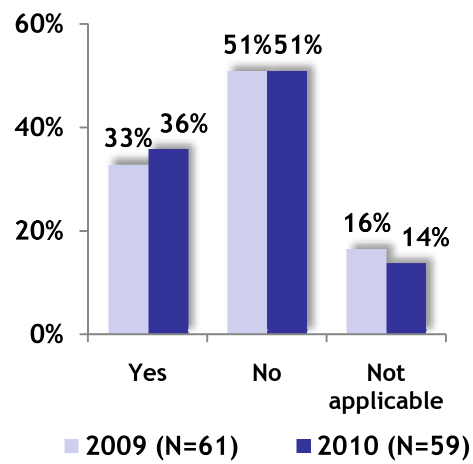
# Water Services – Interruptions Notification

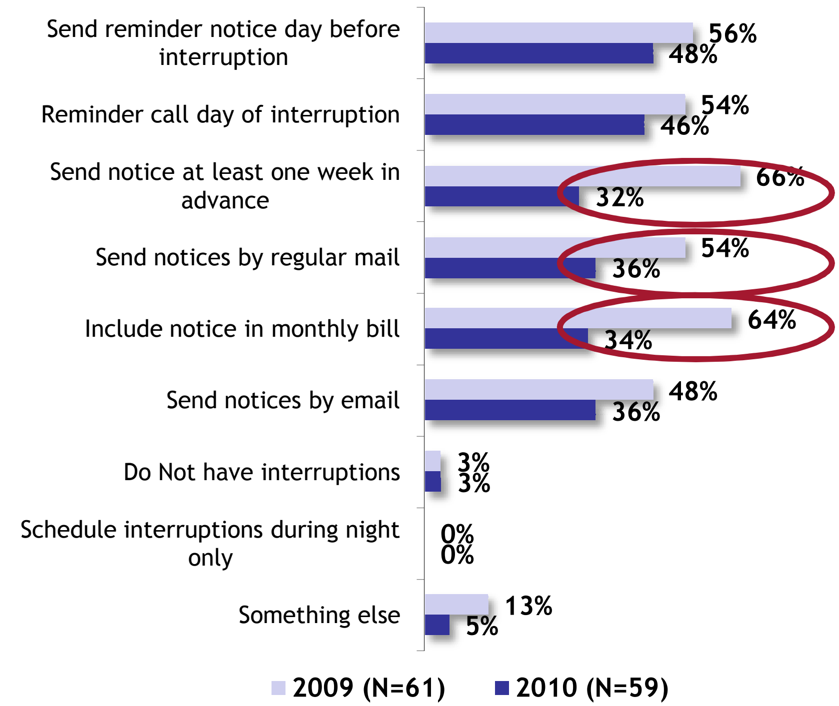
More than one third of the respondents (36%) who had a water interruption in the last year recalled receiving an advance notification of scheduled interruptions, while 51% stated they did not.

Overall, fewer improvements were requested compared to 2009. Top improvements for scheduled service interruptions were *send reminder notice day before interruption* (48%) and *reminder call day of interruption* (46%).

**Advance Notification of Water Interruptions**




**Improvements of Notifications of Scheduled Service Interruptions**




*NOTE: Data red circled indicates significant change/ difference compared to 2009.*

*5. Are you notified in advance when scheduled interruptions to water service will occur?*

*6. In which of the following ways could [INSERT FACILITY BASED ON ZIP CODE] improve their notifications of scheduled service interruptions? You may select all that apply.*

# Water Services – Improvements

When asked about suggestions to improve the water service, 61% of respondents stated they had *no suggestions/fine as is.*

Suggestions given were *water filtration,* mentioned by 14% of respondents (slightly down from 17% in 2009), followed by *lower rates/don't increase rates* (11%, up from 9%) and *improve water pressure* (6%; no change).

*Lower rates* were a specific concern for customers in the Southern Sunrise service area. Those in the Bella Vista area had the fewest suggestions for improvements.

| Suggestions for Improvements | 2009 (N=250) | 2010 (N=251) | Difference from 2009 (percent points) |
|---|---|---|---|
| Water filtration (improve taste/smell/color)/ soften water | 17% | 13% | -4 |
| Lower rates/ don't increase rates | 9% | 11% | +2 |
| Improve water pressure | 6% | 6% | 0 |
| New/more water tower(s)/ pumping station(s) | 1% | 3% | +2 |
| No suggestions/fine as is | 58% | 61% | +3 |

| Significantly Higher |
|---|
| **Lower rates/don't increase rates:** Southern Sunrise (19%) vs. Bella Vista (5%) |
| **No suggestions/ fine as is:** Bella Vista (75%) vs. Rio Rico (59%)/ Southern Sunrise (51%) |

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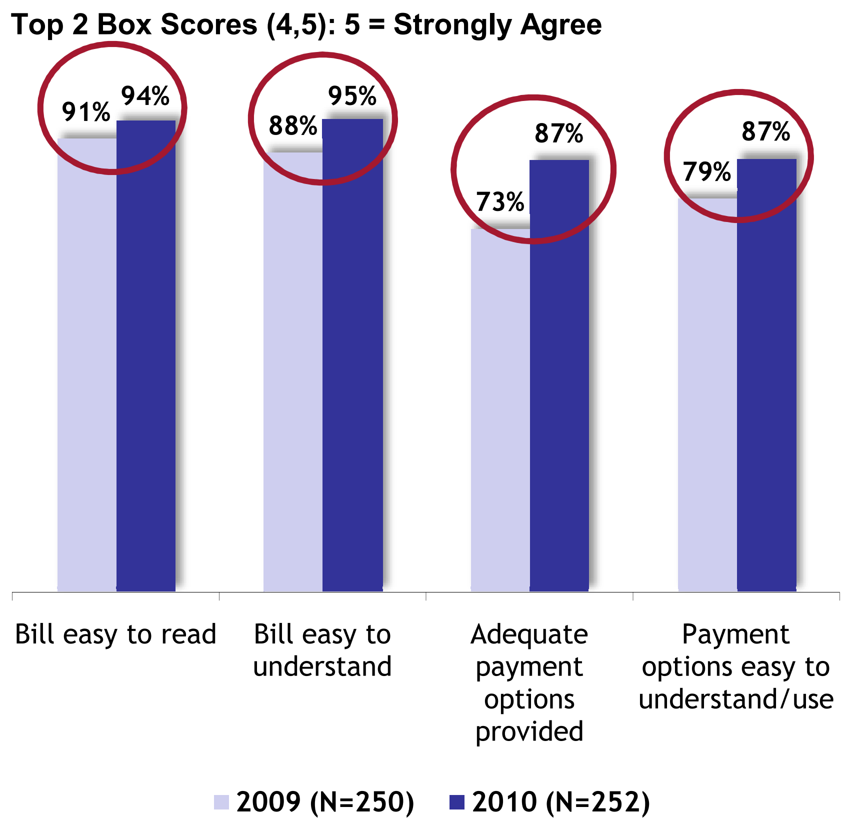
*7. Do you have any suggestions on how [INSERT FACILITY BASED ON ZIP CODE] could improve their water services?*

# Customer Billing - Satisfaction

The Southern AZ facilities received high satisfaction scores on their customer billing, each of which was higher than the rating received in 2009. Respondents agreed that the bill was *easy to read* (94% agree/strongly agree) and *easy to understand* (95% each).

Even *adequate payment options provided* "caught up" with 87% of respondents agreeing with the statement.

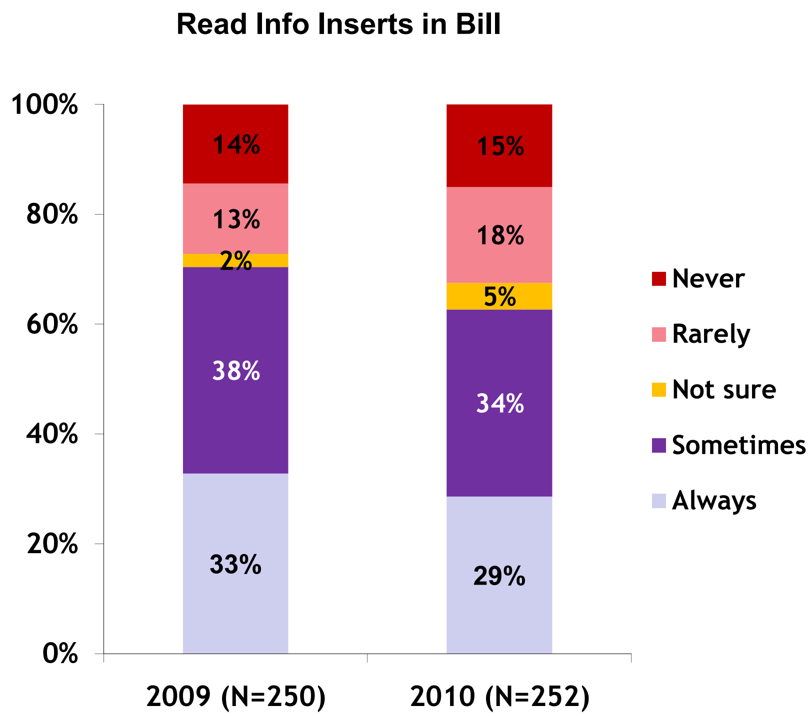



*NOTE: Data red circled indicates significant change/ difference compared to 2009.*

*8a. Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements.*

# Customer Billing – Information/Services

A total of 63% of respondents (slightly fewer than in 2009: 71%) stated they read information inserts included with their bill *sometimes/always* while 33% read the information *rarely/never.*




*9. How often do you read the informational inserts included in your bill?*

*10. If the following new services were made available to [INSERT FACILITY BASED ON ZIP CODE] customers, would you use them?*

# Customer Billings – Improvements

Only a few billing improvements were suggested; 85% of respondents stated *no suggestions/fine as is.*

Improvements *to electronic/ online/ paperless billings* which were leading improvements in 2009 (15%) have been resolved largely. Only 4% still felt improvements in this area were needed.

| Suggestions for Improvements | 2009 (N=250) | 2010 (N=252) | Difference from 2009 (percent points) |
|---|---|---|---|
| Improve or implement Electronic/online/paperless billing | 15% | 4% | -11 |
| Lower rates/don't increase rates | 3% | 3% | 0 |
| Make bill easier to understand | 1% | 3% | +2 |
| A longer grace period | 2% | 1% | -1 |
| No suggestions/fine as is | 74% | 85% | +11 |

*NOTE: Data in orange shaded cell indicate a significant change/difference compared to 2009.*

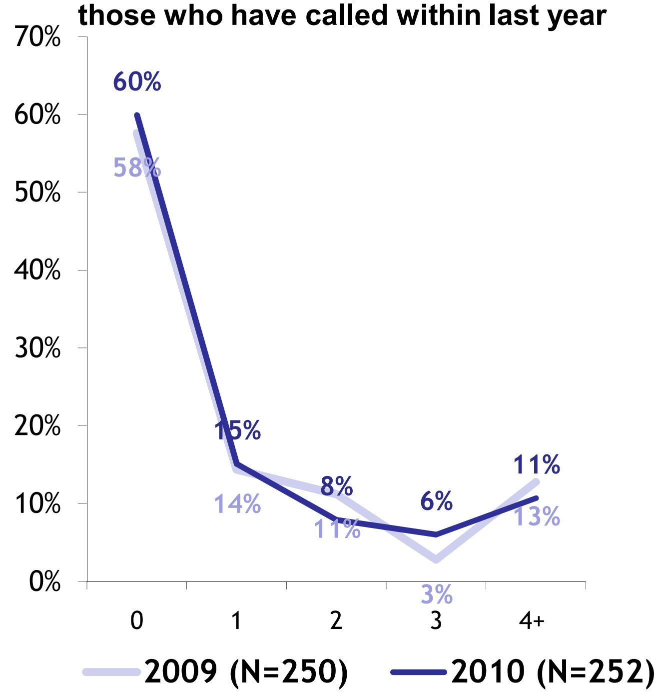
*11. Do you have any suggestions for improving the billing?*

# Customer Service – Calls & Visits

Most of the respondents did not call (60% zero) or visit (55%) the business office within the last year. Respondents who had contacted the business office had both called or visited the office on average two to three times (2.40 calls, 2.44 visits).

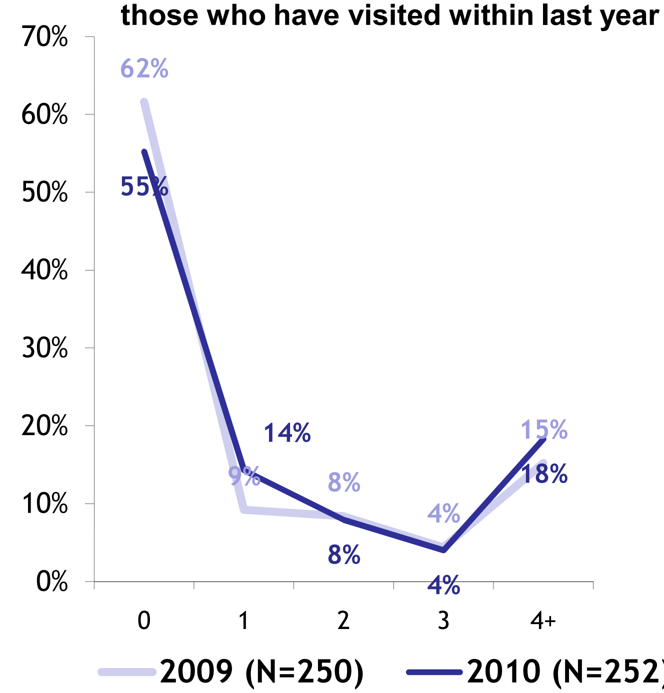
**Times Called Business Office**

**Mean = 2.41 (2009); 2.40 (2010); among those who have called within last year**




**Times Visited Business Office**

**Mean = 2.46 (2009); 2.44 (2010); among those who have visited within last year**



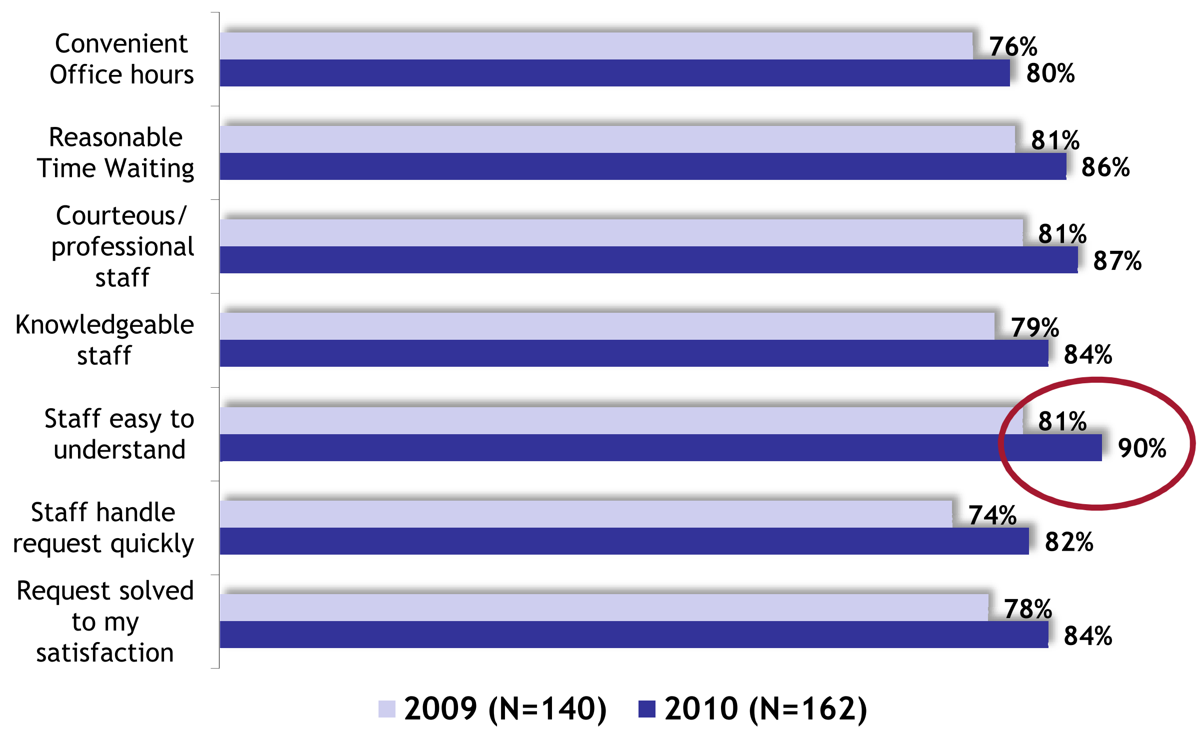

*11b. To the best of your recollection, how many times have you called or visited the [INSERT FACILITY BASED ON ZIP CODE] business office within the last year?*

Martin Garlant – Southern AZ

# Customer Service - Satisfaction

All aspects of customer service tested were rated very positively, inching up from 2009. *Staff was easy to understand* received even significantly higher ratings than in the previous year, with 90% agreeing somewhat or strongly compared to 81% in 2009.

**Top 2 Box Scores (4,5): 5 = Strongly Agree**




*NOTE: Data red circled indicates significant change/ difference compared to 2009.*

*12a. Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements about [INSERT FACILITY BASED ON ZIP CODE]'s customer service. If you have called or visited the office more than once in the last year, please think only about your last contact with the [INSERT FACILITY BASED ON ZIP CODE] business office.*

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Martin Garlant – Southern AZ

# Customer Service – Hours & Wait Time

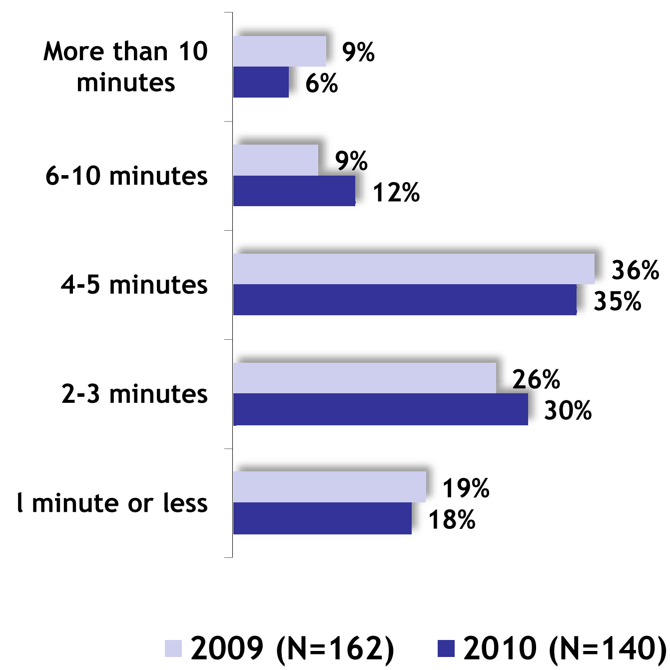
When asked about more convenient office hours, 39% of respondents mentioned *later opening hours/past 5PM*. *Earlier hours/before 8AM* was requested by 6% of respondents and *Saturday hours* were desired by 10%.

In terms of getting a live person, about half (48%) felt that wait time should not be more than three minutes.

| More Convenient Time | 2009 (N=79) | 2010 (N=83) | Difference from 2009 (percent points) |
|---|---|---|---|
| Weekday hours: late open/past 5PM | 32% | 39% | +7 |
| Saturday hours: half/full day | 15% | 10% | -5 |
| Weekday hours: early open/before 8AM | 8% | 6% | -2 |
| Office hours are fine | 23% | 21% | -2 |

**Acceptable Wait Time for Live Person**

**Mean = 3.99 minutes (2009); 3.95 minutes (2010)**




*12b. What would you consider more convenient office hours?*

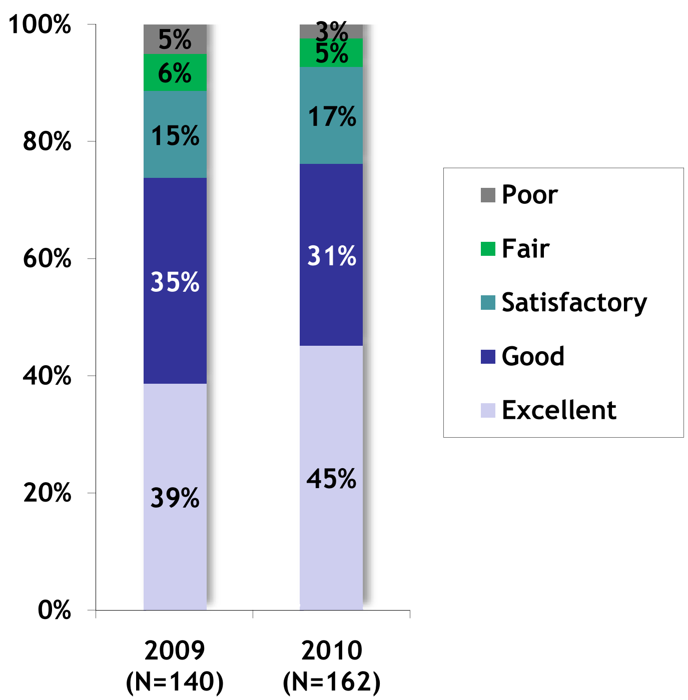
*12c. How long are you willing to wait to speak to a live person?*

# Customer Services – Overall Experience

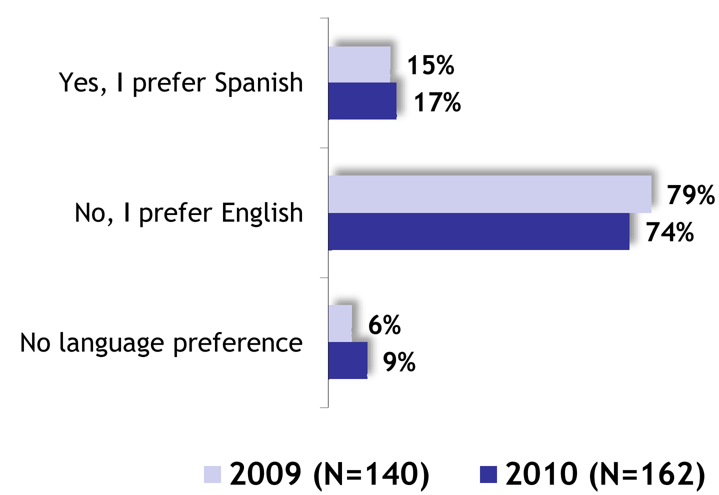
Overall, the customer service experience was rated high with 76% of respondents stating it was *excellent* or *good*. *Excellent* showed a slight increase, up 6% from 2009.

Only a small number of respondents preferred customer service communications in Spanish (17%). However, among Hispanics, 58% preferred Spanish. Residents in Rio Rico were also more likely to prefer customer service in Spanish.

**Satisfaction With Overall Experience**




**Customer Service in Spanish**




| Significantly Higher: Yes, I prefer Spanish |
|---|
| Rio Rico (30%) vs. Bella Vista (5%)/ Southern Sunrise (7%); Hispanics (58%) vs. Non-Hispanics (2%) |

*13. Overall, how would you rate your experience with the customer service you received? If you have called or visited the office more than once in the last year, please think only about your last contact with the [INSERT FACILITY BASED ON ZIP CODE] business office.*

*13a. If customer service were available in Spanish would you take advantage of it?*

Martin Garlant – Southern AZ

# Customer Service - Improvements

Few suggestions were given on how to improve customer service, most said *no suggestion/fine as is* (83%).

Improvement suggestions were related to staff communications: *be more polite/friendly/understanding staff* and *speak English better/ English as a default language* were mentioned by five respondents each (3%).

| Suggestions for Improvements | 2009 (N=140) | 2010 (N=162) | Difference from 2009 (percent points) |
|---|---|---|---|
| Be more polite/ friendly/ understanding | 6% | 3% | -3 |
| Speak English better/ English as a default language | 1% | 3% | +2 |
| Be more professional/ knowledgeable | 6% | 3% | -3 |
| Improve communication w/customers (service follow-up, shut offs, etc) | 1% | 3% | +2 |
| Answer the phone promptly | 0% | 3% | +3 |
| No suggestions/fine as is | 79% | 83% | +4 |

*14. Do you have any suggestions for improving customer service?*

Martin Garlant – Southern AZ

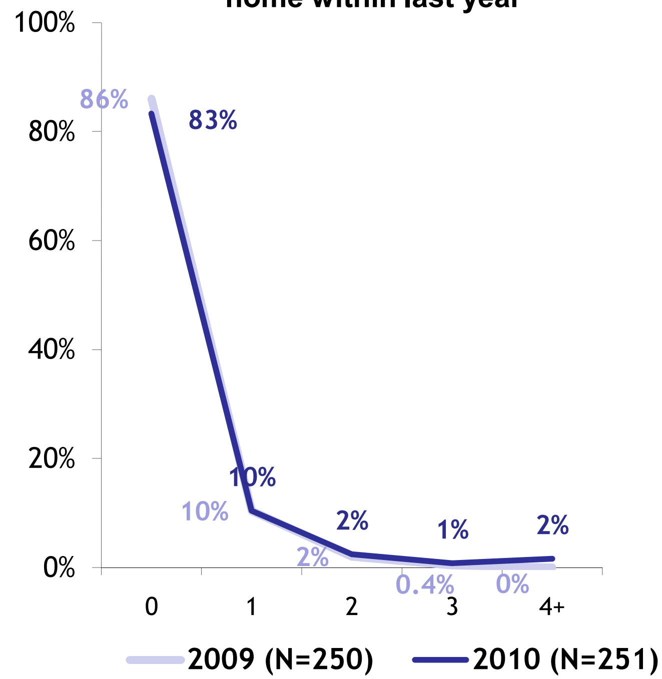
# Service Rep Home Visits

Only a few respondents had received a service representative home visit within the last year (15%). Of those who had, an average of 1.74 visits were made. This was slightly higher than the 1.22 visits reported in 2009.

Those in the Southern Sunrise service area were most likely to have received a service representative home visit.

**Number Called Business Office**

**Mean = 1.22 (2009); 1.74 (2010); among those who had a service rep visit their home within last year**




| Significantly Higher: 1 Visit |
| --- |
| Southern Sunrise (18%) vs. Rio Rico (8%)/ Bella Vista (7%) |

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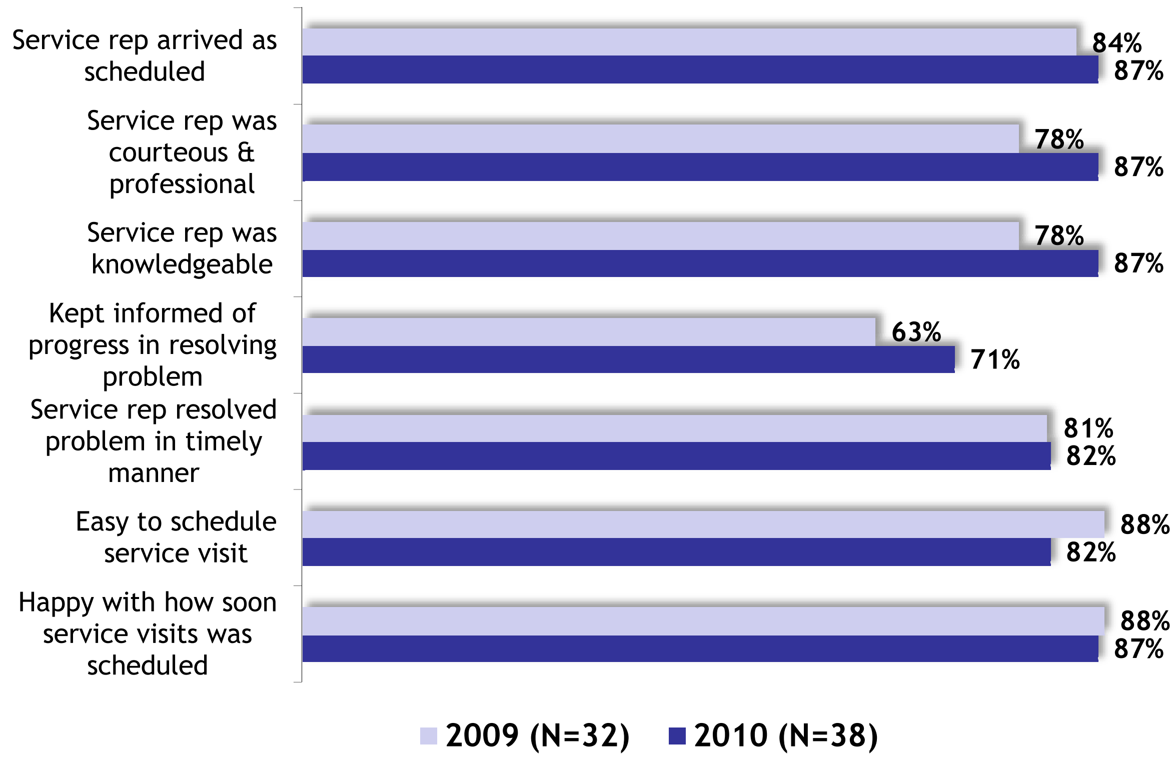
*14b. How many times has an [INSERT FACILITY BASED ON ZIP CODE] employee visited your home to resolve a problem within the last year?*

# Service Rep Home Visits - Satisfaction

Those who had a service representative visit stated a high level of satisfaction with agreement levels at 71% and above (*agree/strongly agree*) that aspects with the visit were performed well.

**Top 2 Box Scores (4,5): 5 = Strongly Agree**



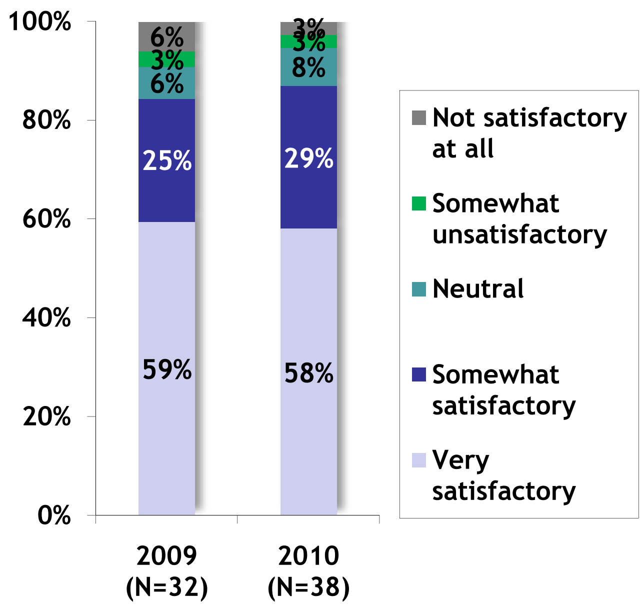

*15. Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements about your in home service visit. If an [INSERT FACILITY BASED ON ZIP CODE] employee has visited your home more than once within the last year, please think only about your last visit.*

# Service Rep Home Visits – Overall Satisfaction & Improvements

Overall satisfaction was high with 87% of respondents stating they were *somewhat* or *very satisfied* with their experience with the service representatives home visit. This was up slightly from the 84% received in 2009.

The majority of the respondents (32 out of 38) had no suggestions for improvement.

**Overall Satisfaction With Service Visit**




| Suggestions for Improvements | 2009 (N=32) | 2010 (N=38) | Difference from 2009 (percent points) |
|---|---|---|---|
| Resolve problems faster | 0% | 8% | +8 |
| Service personnel be more knowledgeable | 6% | 3% | -3 |
| Notification in advance when visit will be | 3% | 3% | 0 |
| Be on time for scheduled appointment | 3% | 3% | 0 |
| No suggestions/fine as is | 84% | 84% | 0 |

*16. Overall, how would you rate your experience with the service visit to your home using a 5-point scale with 5 being "Very Satisfactory" and 1 being "Not Satisfactory At All"? If you had more than one visit in the last year, please think only about your last visit.*

*17. Do you have any suggestions for improving home visits?*

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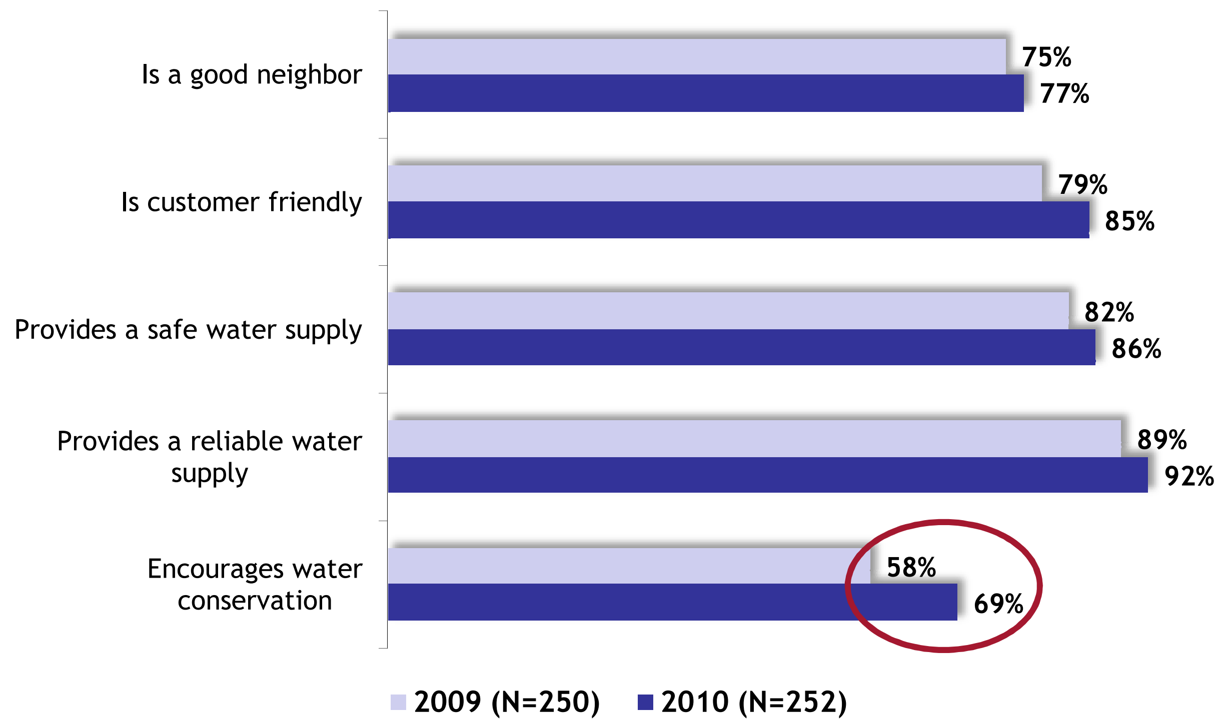
# Company Evaluation - Satisfaction

For the overall company evaluation, Southern AZ facilities received high scores on most tested aspects scoring 77% and higher based on top 2 box scores (*agree/strongly agree*). *Encourages water conservation* was the only area that received a somewhat lower score (69%), but this was significant improvement compared to 2009 (58%).

**Top 2 Box Scores (4,5): 5 = Strongly Agree**




*NOTE: Data red circled indicates significant change/ difference compared to 2009.*

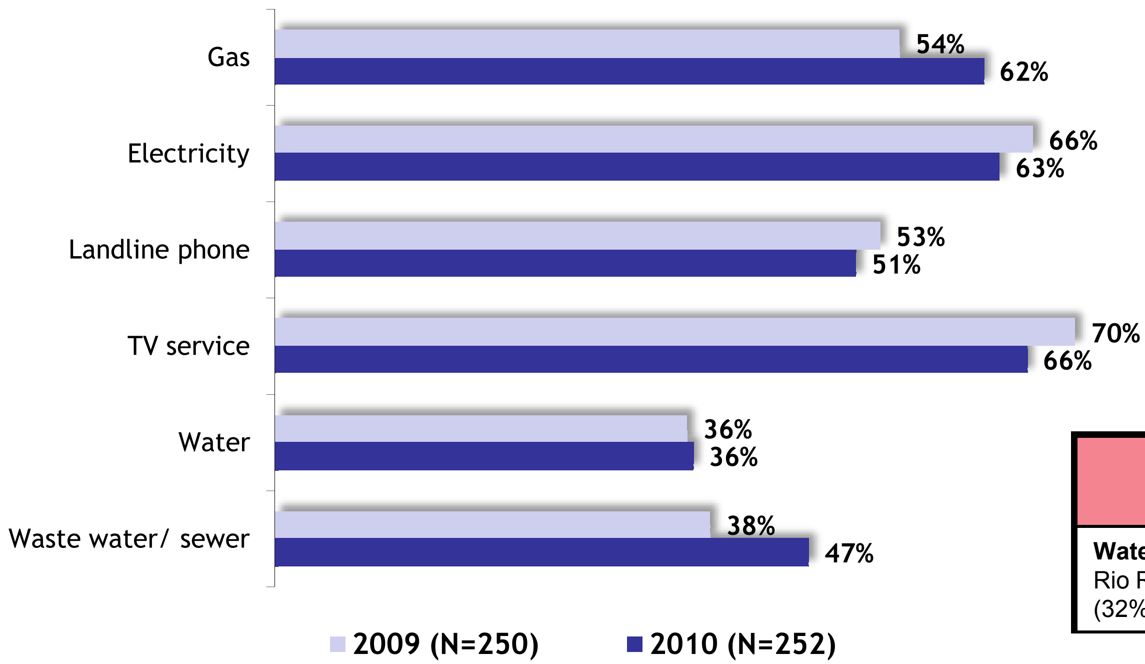
*18. Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements about [INSERT FACILITY BASED ON ZIP CODE].*

# Company Evaluation – Rates for Utilities

*Television service*, *electricity* and *gas* were the services that respondents felt were priced *high* or *much too high*. *Water* and *waste water/sewer* was considered expensive by comparatively fewer respondents (36% and 47%, respectively).

Bella Vista water service recipients were least likely to consider their water rates somewhat *high* or *much too high*.

**Top 2 Box Scores (4,5): 5 = Much Too High**



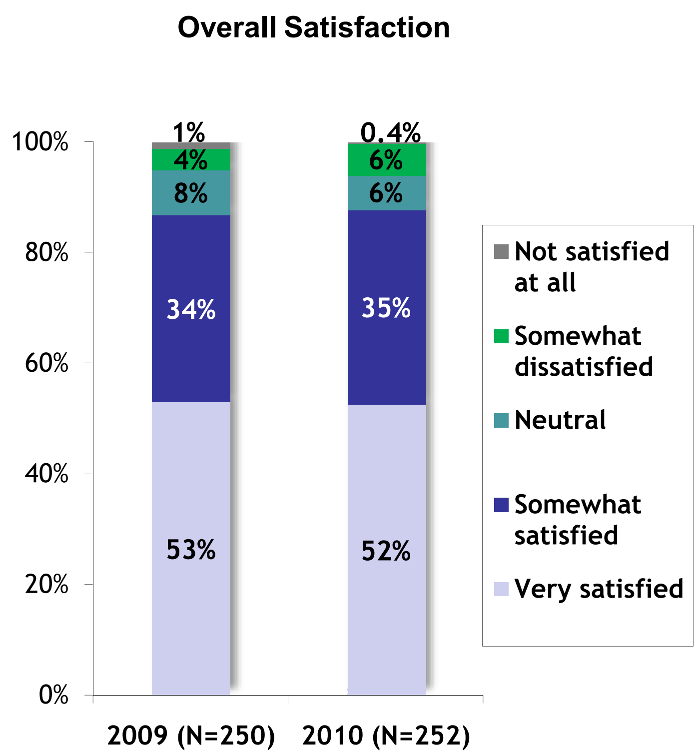

| Significantly Higher |
|---|
| **Water:** Southern Sunrise (60%)/ Rio Rico (57%) vs. Bella Vista (32%) |

*19. For each of the following utility services, please indicate if you feel the rates charged are much too high, somewhat too high, just right, somewhat low, or very low.*

# Company Evaluation – Overall Satisfaction

The majority of respondents (87%) were *somewhat* or *very satisfied* with their Southern AZ company providing water/ waste water to them. Reasons for satisfaction included *service was satisfactory/ good/ excellent* (13%), *reliable/ received service paid for/ no service interruptions* (10%) and *good/friendly/courteous customer service* (9%).

While only 6% of respondents were dissatisfied, *cost* was an important concern for all customers regardless of how satisfied they were: *cost too high/rate increase* was mentioned by 16% regardless of satisfaction, but especially by those not satisfied (40%).




| | 2009 | 2010 | Difference from 2009 (percent points) |
|---|---|---|---|
| **Why Satisfied** | N=217 | N=221 | |
| Cost is too high/rate increases | 10% | 14% | +4 |
| Service is satisfactory/good/excellent | 11% | 13% | +2 |
| Reliable/receive services paid for/No service interruptions | 17% | 10% | +7 |
| Good/friendly/courteous customer service | 14% | 9% | -5 |
| Cost is reasonable | 14% | 5% | -9 |
| **Why Not Satisfied** | N=13 | N=15 | |
| Cost is too high/rate increases | 23% | 40% | +17 |
| Poor/ unfriendly/ uncaring customer service | 15% | 13% | -2 |
| They are dishonest/ crooked/ price gougers | 0% | 13% | +13 |

*NOTE: Data in orange shaded cell indicate a significant change/difference compared to 2009.*

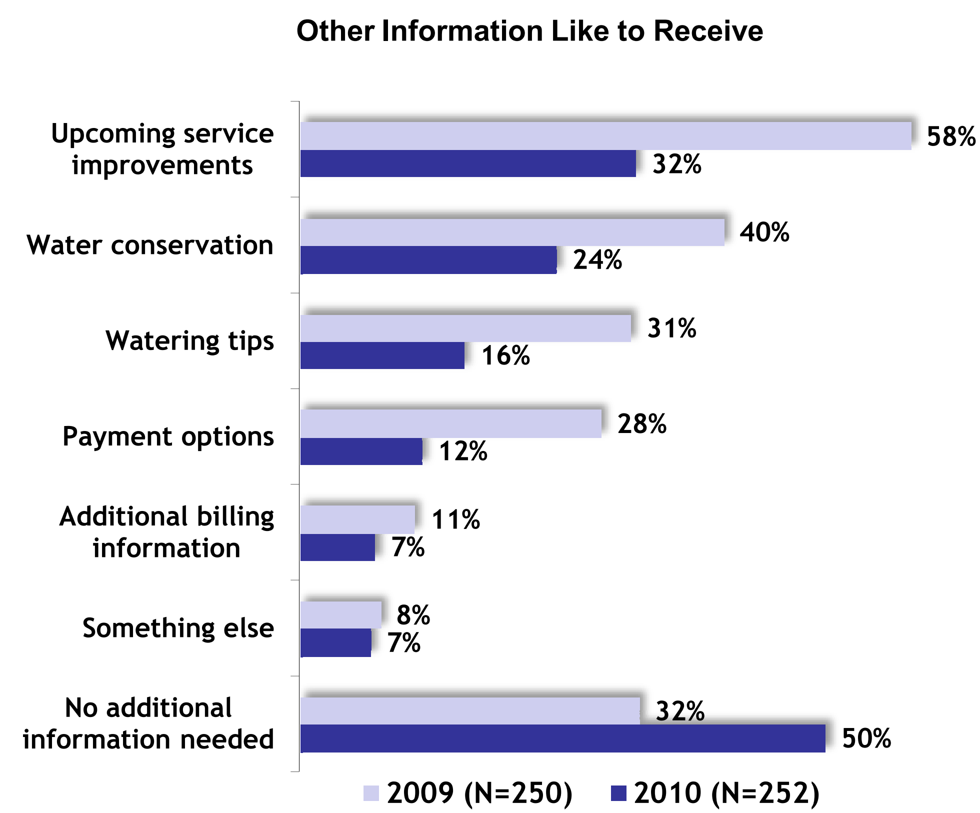
*20. Overall, how satisfied are you with [INSERT FACILITY BASED ON ZIP CODE]?*
*20a. Being as specific as possible, why did you say you are [INSERT FROM Q20] with [INSERT FACILITY BASED ON ZIP CODE]?*

Martin Garlant – Southern AZ

# Company Evaluation - Information

In terms of additional information fewer customers stated a need for additional information 2010 (50% *no additional information needed*, up from 32% in 2009).

Those who wanted additional information stated they would like to receive *info on upcoming service improvements* (32%), followed by *water conversation* (24%). They remained the key information requests consistent with 2009 findings.

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*21. What other information would you like to receive from [INSERT FACILITY BASED ON ZIP CODE]? You may select all that apply.*

**Business Manager: Charlie Hernandez Eastern Arizona (Black Mountain, Gold Canyon, Entrada del Oro)**

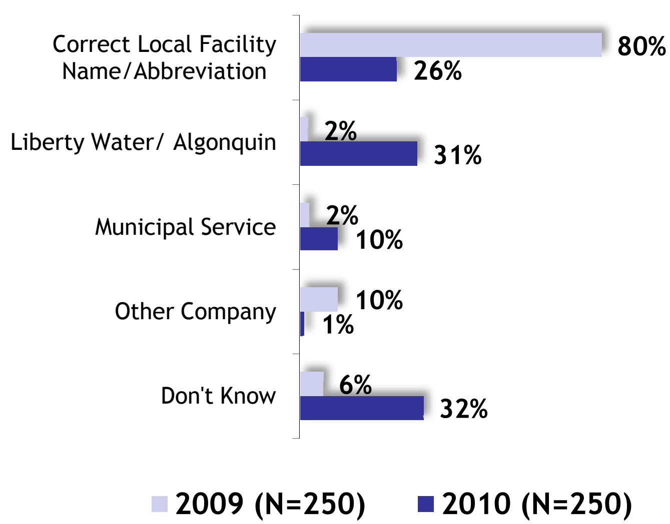
# Awareness & Perception

Familiarity with the waste water provider was still over 50%, however customers were associating with the newly branded Liberty Water name (31%) more than with the local facility name.

When asked to describe the provider of their waste water/sewer service 46% of the comments given were positive while 41% were negative.

While having a considerable amount of negative associations, the number of negative comments went down significantly compared to 2009 (41% in 2010 vs. 61% in 2009). Even the perception of *cost is too high* had decreased compared to the previous year's results (35% compared to 53% in 2009).

**Name of Waste Water Provider**




| | 2009 | 2010 | Difference from 2009 (percent points) |
|---|---|---|---|
| **Positive Comments (NET)** | 55% | 46% | -9 |
| Positive general | 52% | 46% | -6 |
| Cost is reasonable | 2% | 1% | -1 |
| **Negative Comments (NET)** | 61% | 41% | -20 |
| Cost is too high | 53% | 35% | -18 |
| Sewage smell | 8% | 6% | -2 |
| Negative general | 5% | 4% | -1 |

*NOTE: Data in orange shaded cell indicate a significant change/difference compared to 2009.*

| **Significantly Higher** |
|---|
| **Negative comments:** Gold Canyon (47%) vs. Black Mountain (24%) |

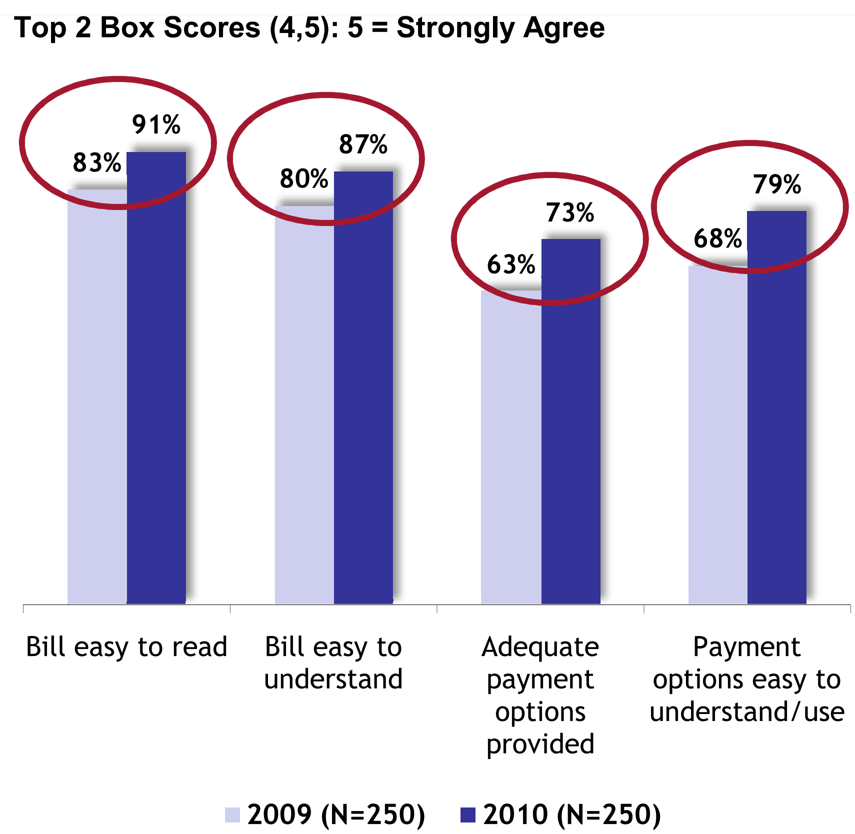
*A1. What is the name of the company that provides water and/or waste water service to your household/business?*

*A2. How would you describe your water and/or waste water service company and the services it provides?*

Charlie Hernandez – Eastern AZ

# Customer Billing - Satisfaction

The Eastern AZ facilities received high satisfaction scores on all aspects of customer billing tested. Agreement was significantly higher compared to 2009.




*NOTE: Data red circled indicates significant change/ difference compared to 2009.*

*8a. Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements.*

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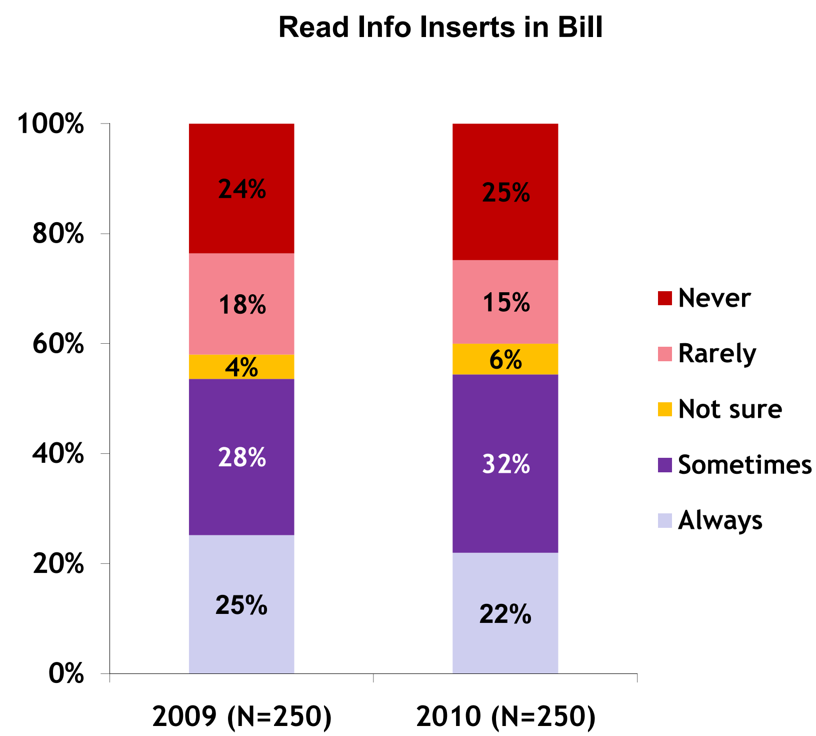
# Customer Billing – Information/Services

A little more than half of the respondents (54%) stated they read information inserts included with their bill *sometimes* or *always* while 40% read the information *rarely* or *never*.




*9. How often do you read the informational inserts included in your bill?*
*10. If the following new services were made available to [INSERT FACILITY BASED ON ZIP CODE] customers, would you use them?*

# Customer Billings – Improvements

While 79% of respondents did not have any suggestions on how to improve customer billing, the main request by respondents who made suggestions was to *lower rates/don't increase rates* (12% of respondents). Other mentions were again *improve or implement electronic/online paperless billing* (mentioned by 5%).

| Suggestions for Improvements | 2009 (N=250) | 2010 (N=250) | Difference from 2009 (percent points) |
|---|---|---|---|
| Lower rates/don't increase rates | 17% | 12% | -5 |
| Improve or implement electronic/online/paperless billing | 6% | 5% | -1 |
| Make bill easier to understand | 1% | 1% | 0 |
| Eliminate inserts in billing envelope | 0.4% | 1% | +0.6 |
| No suggestions/fine as is | 69% | 79% | +10 |

*NOTE: Data in orange shaded cell indicate a significant change/difference compared to 2009.*

*11. Do you have any suggestions for improving the billing?*

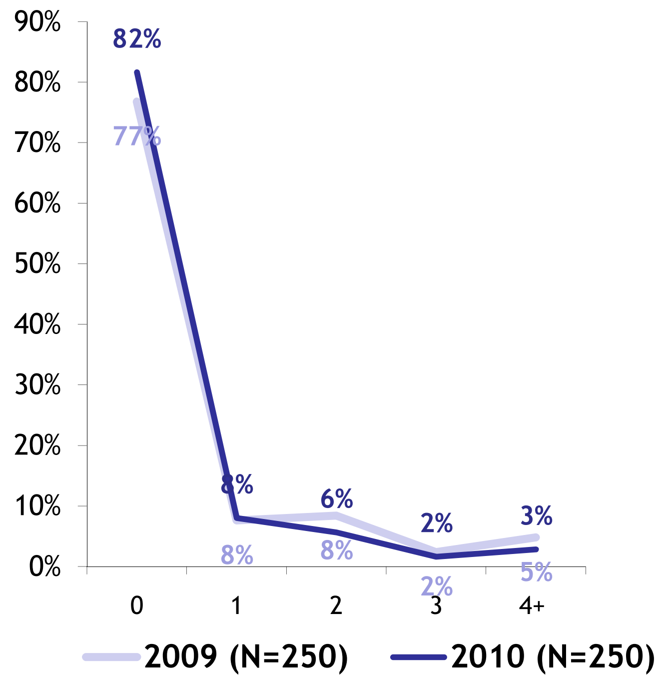
Charlie Hernandez – Eastern AZ

# Customer Service – Calls & Visits

The majority of respondents did not call (82%) or visit (96%) the business office within the last year. Respondents who had contacted the business office had called on average about 2 times, while visiting the office 1 or 2 times.

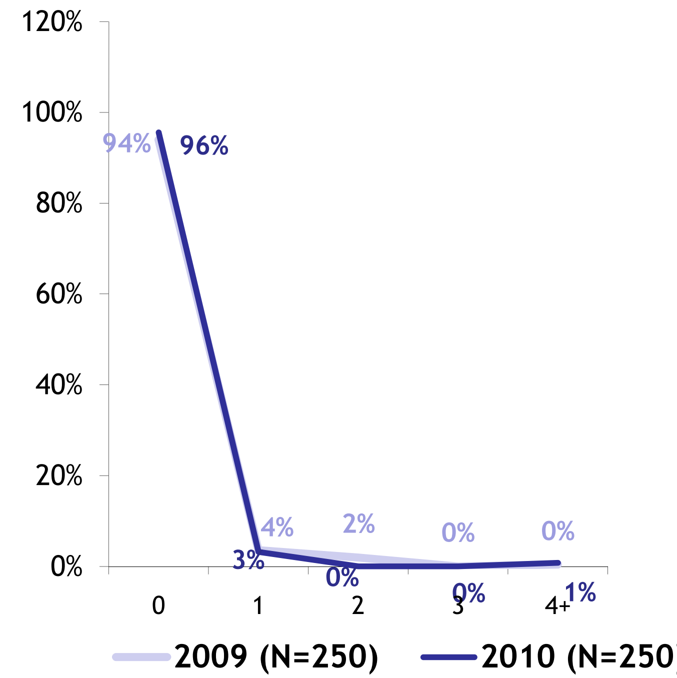
**Times Called Business Office**

**Mean = 2.25 (2009); 2.00 (2010); among those who have called within last year**




**Times Visited Business Office**

**Mean = 1.53 (2009); 1.44 (2010); among those who have visited within last year**




*11b. To the best of your recollection, how many times have you called or visited the [INSERT FACILITY BASED ON ZIP CODE] business office within the last year?*

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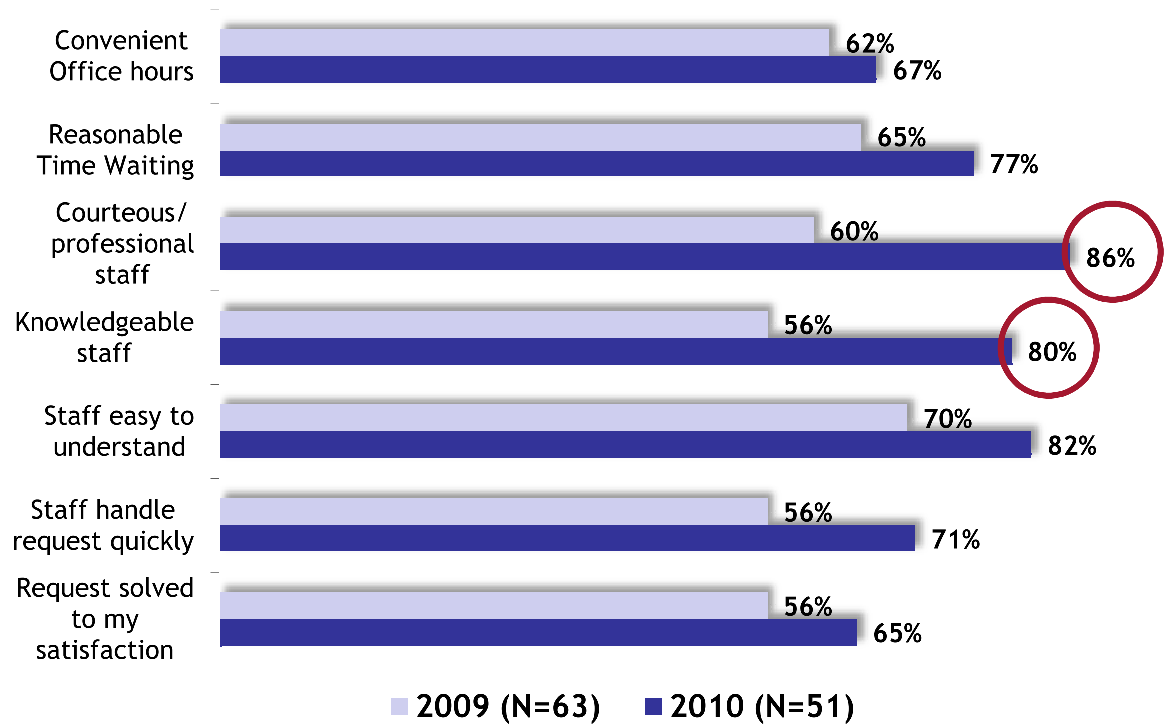
# Customer Service - Satisfaction

Customer service was rated better compared to 2009 on all attributes tested and significantly higher for *courteous/ professional staff* (86%) and *knowledgeable staff* (80%).

The aspects receiving the lowest ratings still scored well with 65% or more of respondents somewhat or strongly agreeing that office hours are convenient and requests are resolved satisfactorily.

**Top 2 Box Scores (4,5): 5 = Strongly Agree**




*NOTE: Data red circled indicates significant change/ difference compared to 2009.*

*12a. Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements about [INSERT FACILITY BASED ON ZIP CODE]'s customer service. If you have called or visited the office more than once in the last year, please think only about your last contact with the [INSERT FACILITY BASED ON ZIP CODE] business office.*

Charlie Hernandez – Eastern AZ

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# Customer Service – Hours & Wait Time

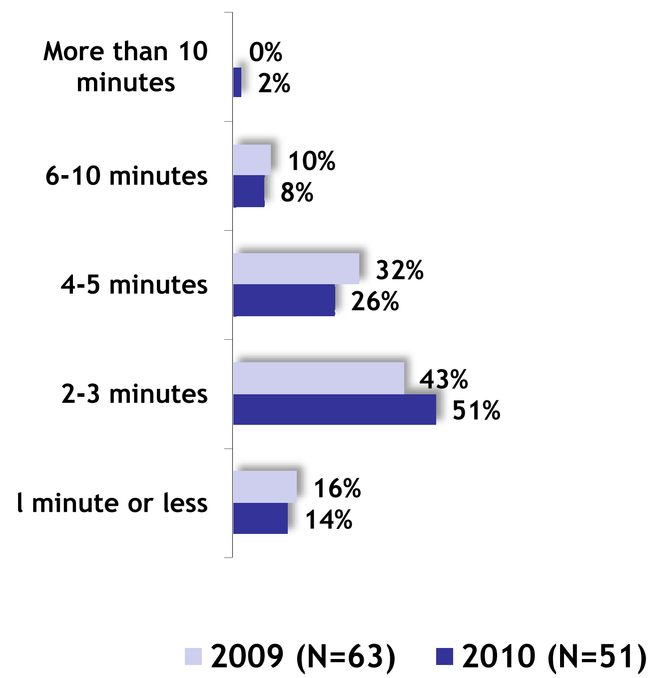
When asked about more convenient office hours, 25% of the respondents stated the current *office hours are fine*. *Later opening hours/past 5PM* and *earlier hours/before 8AM* were requested by 11% each. Only 4% asked for *Saturday office hours.*

A total of 65% (slightly up from 59% in 2009) felt that wait time should not be more than 3 minutes.

| More Convenient Time | 2009 (N=44) | 2010 (N=28) | Difference from 2009 (percent points) |
|---|---|---|---|
| Weekday hours: late open/past 5PM | 23% | 11% | -12 |
| Saturday hours: half/full day | 7% | 4% | -5 |
| Weekday hours: early open/before 8AM | 11% | 11% | 0 |
| Office hours are fine | 14% | 25% | +11 |

**Acceptable Wait Time for Live Person**

**Mean = 3.65 minutes (2009); 3.44 minutes (2010)**




*12b. What would you consider more convenient office hours?*

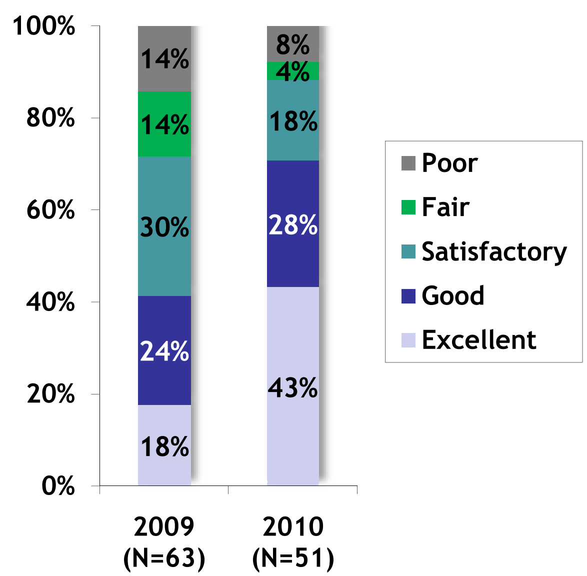
*12c. How long are you willing to wait to speak to a live person?*

# Customer Services – Overall Experience

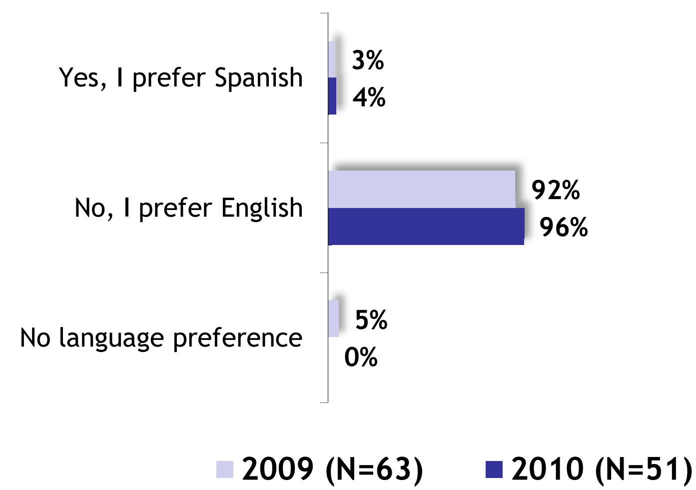
Overall customer service experience received  significantly higher ratings compared to the previous year's findings (71% vs. 42% in 2009 rating customer service as *excellent* or *good).*

Only a small number of respondents (4%) preferred customer service communications in Spanish.

**Satisfaction With Overall Experience**




**Customer Service in Spanish**




*13. Overall, how would you rate your experience with the customer service you received? If you have called or visited the office more than once in the last year, please think only about your last contact with the [INSERT FACILITY BASED ON ZIP CODE] business office.*

*13a. If customer service were available in Spanish would you take advantage of it?*

# Customer Service - Improvements

Few suggestions were given on how to improve customer service, many (82%) having no suggestions/stated it was fine as is.

Improvement suggestions were related to staff communications: *improve communication w/customers* (8%) and *more polite/friendly/understanding staff* (2%).

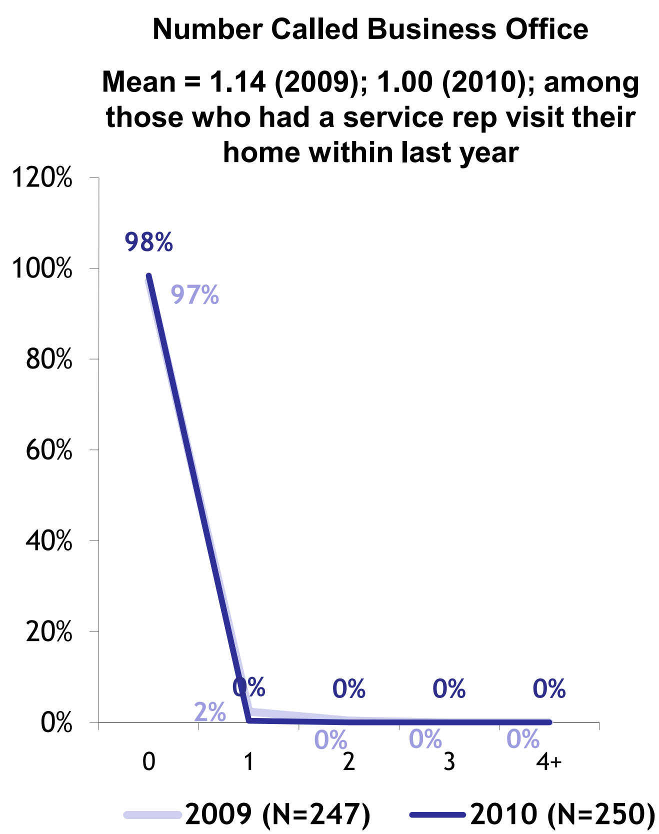
| Suggestions for Improvements | 2009 (N=63) | 2010 (N=51) | Difference from 2009 (percent points) |
|---|---|---|---|
| Improve communication w/customers (service follow-up, shut offs, etc) | 2% | 8% | +6 |
| Lower the rates/don't increase rates | 5% | 6% | +1 |
| Be more polite/friendly/understanding | 6% | 2% | -4 |
| No suggestions/fine as is | 68% | 82% | +14 |

*14. Do you have any suggestions for improving customer service?*

Charlie Hernandez – Eastern AZ

# Service Rep Home Visits

Only one respondent reported having received a service representative home visit within the last year.

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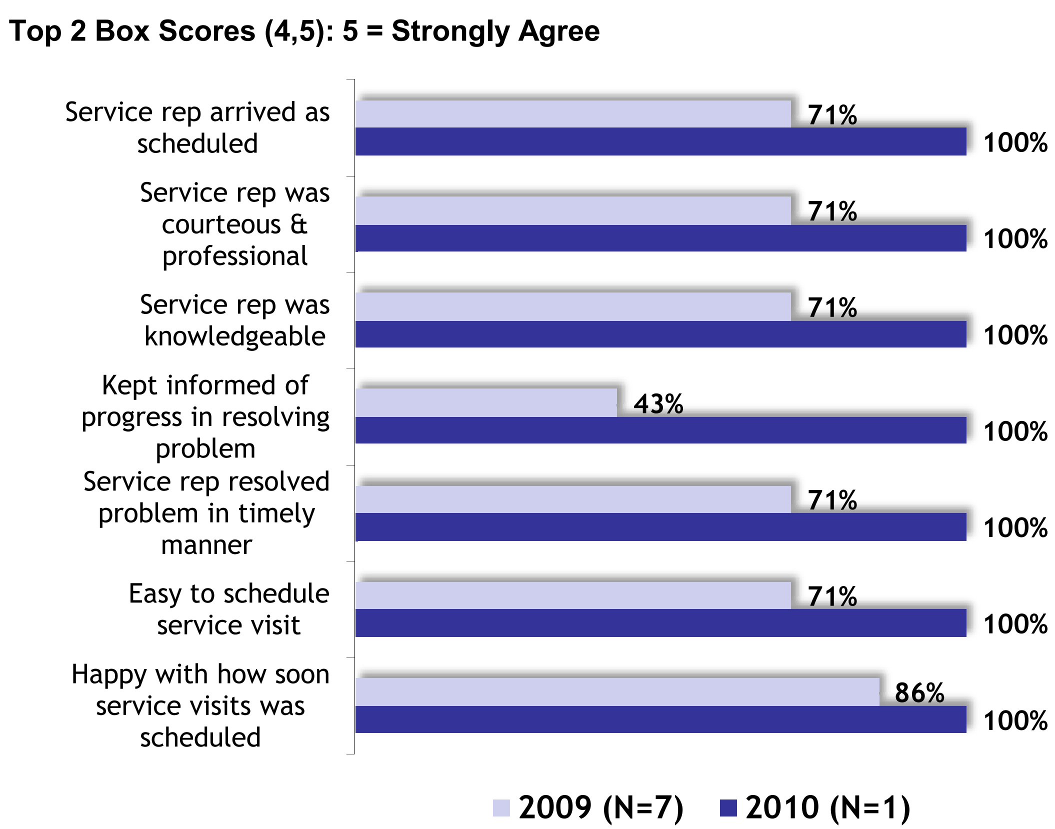
*14b. How many times has an [INSERT FACILITY BASED ON ZIP CODE] employee visited your home to resolve a problem within the last year?*

Charlie Hernandez – Eastern AZ

# Service Rep Home Visits - Satisfaction

The one customer who had a service representative visit stated high level of satisfaction with the visit agreeing that all aspects were performed well.




15. *Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements about your in home service visit. If an [INSERT FACILITY BASED ON ZIP CODE] employee has visited your home more than once within the last year, please think only about your last visit.*

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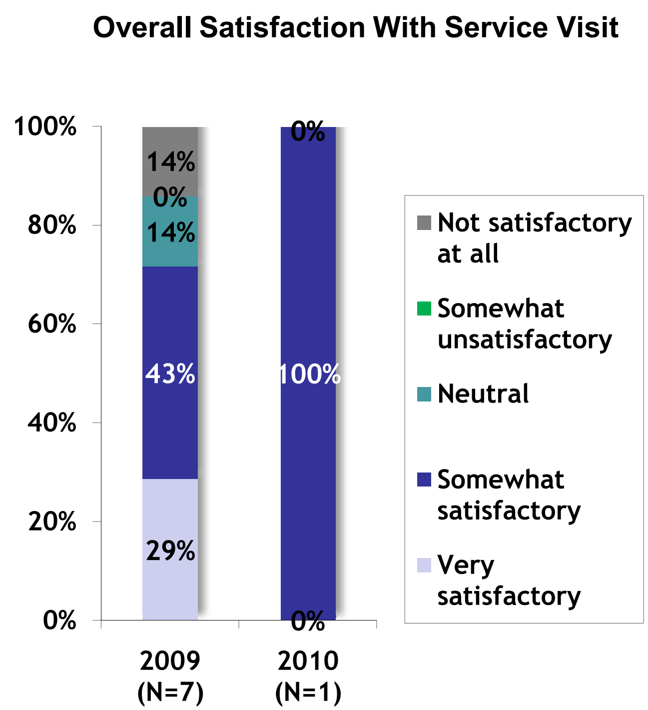
Charlie Hernandez – Eastern AZ

# Service Rep Home Visits – Overall Satisfaction & Improvements

The customer rated the overall experience with somewhat satisfactory and had no suggestions regarding improvements.

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*16. Overall, how would you rate your experience with the service visit to your home using a 5-point scale with 5 being "Very Satisfactory" and 1 being "Not Satisfactory At All"? If you had more than one visit in the last year, please think only about your last visit.*

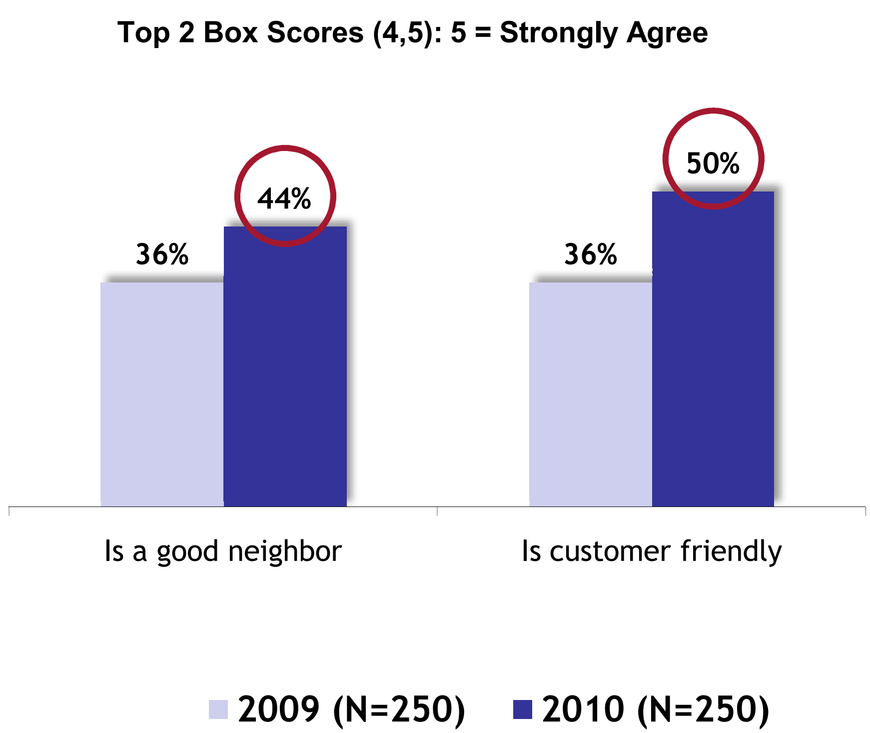
*17. Do you have any suggestions for improving home visits?*

Charlie Hernandez – Eastern AZ

# Company Evaluation - Satisfaction

As part of the overall company evaluation, respondents were asked to state their agreement that waste water/sewer provider is a good neighbor and is customer friendly. Both received significantly higher scores than in 2009, however still much lower agreement scores than facilities in other service regions.

Customers in the Gold Canyon service area continued to give lower scores than customers of the other facilities within the Eastern AZ service area.




| Significantly Higher |
| --- |
| **Is a good neighbor:** Entrada del Oro (80%) / Black Mountain (63%) vs. Gold Canyon (36%) |
| **Is customer friendly:** Entrada del Oro (73%)/ Black Mountain (67%) vs. Gold Canyon (44%) |

*NOTE: Data red circled indicates significant change/ difference compared to 2009.*

*18. Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements about [INSERT FACILITY BASED ON ZIP CODE].*

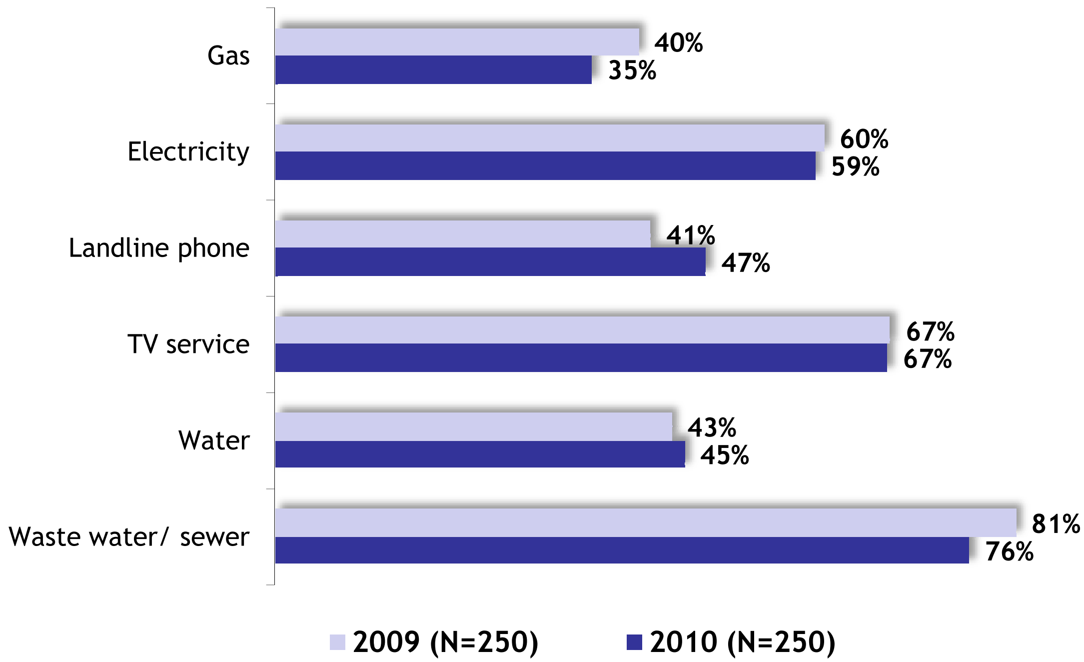
Charlie Hernandez – Eastern AZ

# Company Evaluation – Rates for Utilities

The majority of respondents (76%) considered *waste water/sewer* rates somewhat or much too high. Significantly more respondents found the rates high compared to all other services and utilities tested.

Within the Eastern AZ service area, Gold Canyon customers were most likely to find their waste water/sewer rates expensive.

**Top 2 Box Scores (4,5): 5 = Much Too High**




| Significantly Higher: Waste water/sewer |
|---|
| Gold Canyon (83%) vs. Black Mountain (50%) |

*19. For each of the following utility services, please indicate if you feel the rates charged are much too high, somewhat too high, just right, somewhat low, or very low.*

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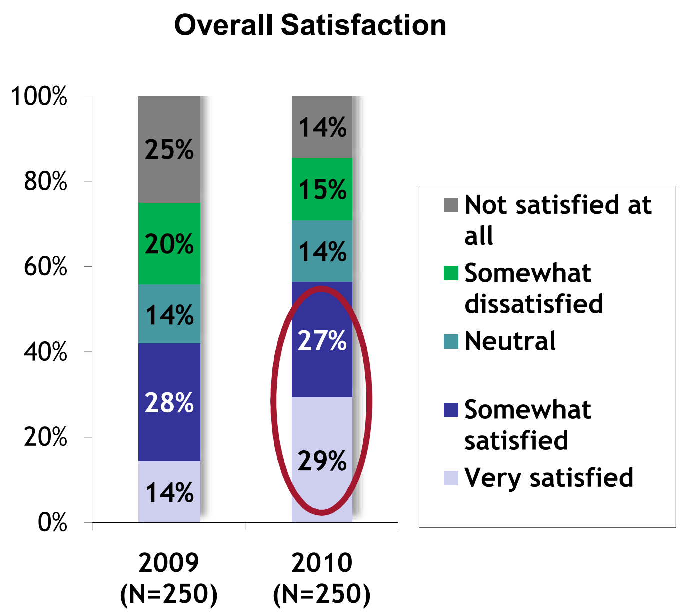
# Company Evaluation – Overall Satisfaction

Respondents reported significantly higher satisfaction compared to 2009 with 56% indicating they were somewhat or very satisfied compared to 42% in 2009. Respondents in the Black Mountain service area tended to be most satisfied with a top 2 box score (somewhat/very satisfied) of 75%.

While more than half of interviewed customers indicated satisfaction with the waste water facility providing service, key concern among them was *cost is too high/rate increases* (29%). Among those not satisfied, cost was even more of an issue mentioned by 81% (slightly up from 75% in 2009) as reason why they were dissatisfied. Other aspects mentioned were *odor from sewer/sewage processing facility* (15%) and *smell/ taste of water* (7%).




| Significantly Higher: Top 2 Box = very/somewhat satisfied |
|---|
| Black Mountain (75%) vs. Gold Canyon (51%) |

*NOTE: Data red circled indicates significant change/ difference compared to 2009.*

| | 2009 | 2010 | Difference from 2009 (percent points) |
|---|---|---|---|
| **Why Satisfied** | N=105 | N=141 | |
| Cost is too high/rate increases | 30% | 29% | -1 |
| Service is satisfactory/good/excellent | 10% | 6% | -4 |
| Good/friendly/courteous customer service | 6% | 5% | -1 |
| Service is adequate | 1% | 4% | +3 |
| Cost is reasonable | 3% | 4% | +1 |
| Reliable/receive services paid for/no service interruptions | 9% | 3% | -6 |
| **Why Not Satisfied** | N=111 | N=73 | |
| Cost is too high/rate increases | 75% | 81% | +6 |
| Odor from sewer/sewage processing facility | 20% | 15% | -5 |
| Smell/taste of water | 2% | 7% | +5 |
| They are dishonest/crooked/price gougers | 15% | 4% | -11 |
| Poor/unfriendly/uncaring customer service | 8% | 1% | -7 |

*NOTE: Data in orange shaded cell indicate a significant change/ difference compared to 2009.*

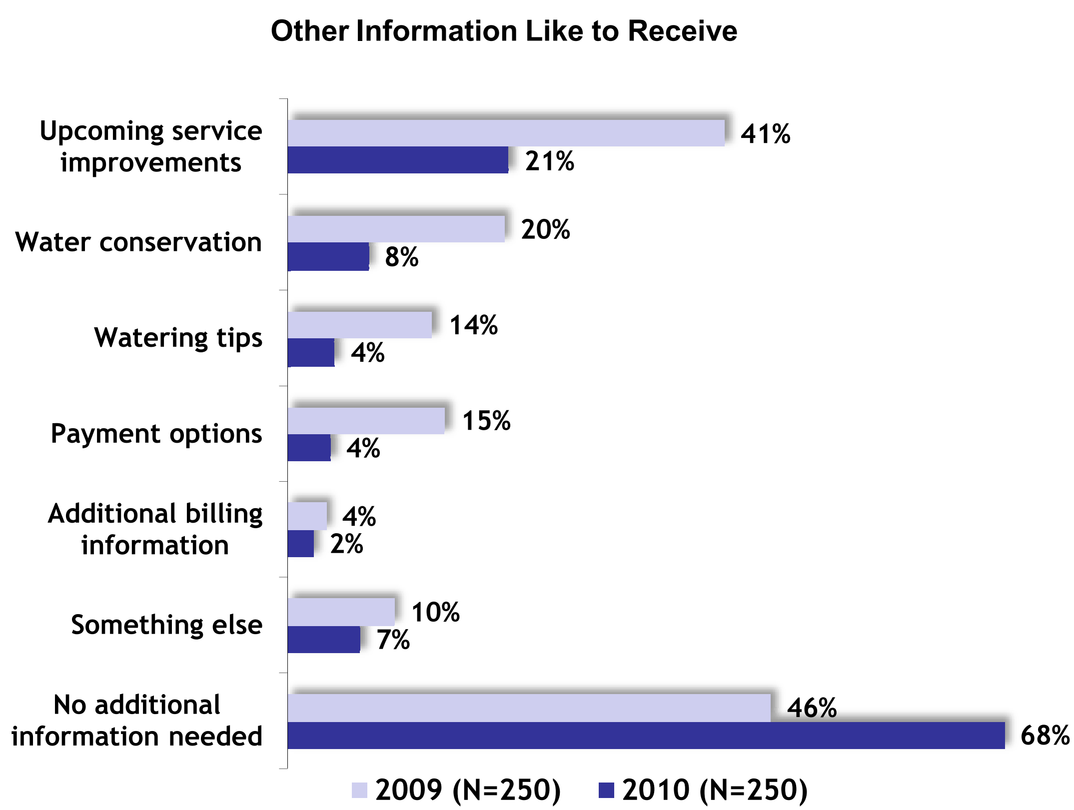
*20. Overall, how satisfied are you with [INSERT FACILITY BASED ON ZIP CODE]?*

*20a. Being as specific as possible, why did you say you are [INSERT FROM Q20] with [INSERT FACILITY BASED ON ZIP CODE]?*

# Company Evaluation - Information

In terms of additional information significantly more customers stated they had *no additional information need* (68%) up significantly from 46% in 2009.

The top information respondents would like to receive was *info on upcoming service improvements* selected by 21%. Those tended to be in the Entrada del Oro service area (33%).




*21. What other information would you like to receive from [INSERT FACILITY BASED ON ZIP CODE]? You may select all that apply.*

Joe Wilkins – Central US

**Business Manager: Joe Wilkins (through Sean Lonergan)**
**Central US (Tall Timbers, Timber Creek, Woodmark, Big Eddy, Holly Ranch, Ozark Mountain, Holiday Hills)**

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Joe Wilkins – Central US

# Awareness & Perception

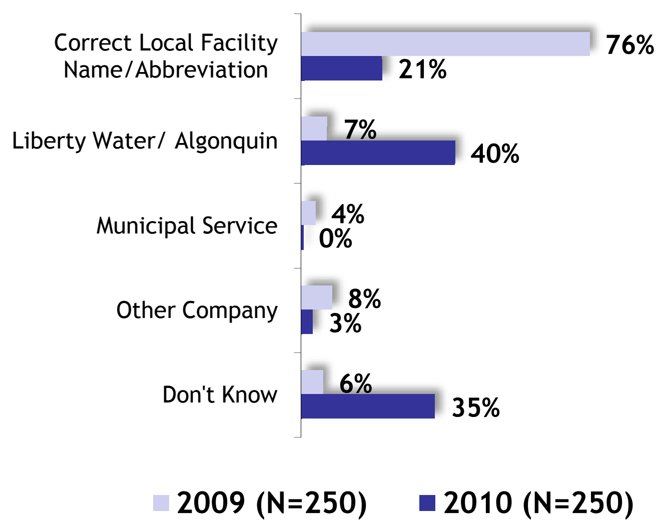
Respondents in the Central US service area were familiar with the company name providing their water and waste water services, however association shifted strongly from the local facility name to the new name of Liberty Water.

When asked to describe the provider of their waste water/sewer service 64% of the comments given were positive and 34% negative (slightly down from 40% in 2009).

Positive comments tended to be general (61%) and few were specific to the services provided. Negative comments centered around cost (cost too high mentioned by 26%). Other complaints related to *water quality* (5%) and *water pressure* (3%).

**Name of Water/Waste Water Provider**

**N = 250**




| | 2009 | 2010 | Difference from 2009 (percent points) |
|---|---|---|---|
| **Positive Comments (NET)** | 68% | 64% | -4 |
| Positive general | 63% | 61% | -2 |
| Water quality | 11% | 2% | -9 |
| **Negative Comments (NET)** | 40% | 34% | -6 |
| Cost is too high | 28% | 26% | -2 |
| Water quality | 6% | 5% | -1 |
| Water pressure | 8% | 3% | -5 |
| Negative general | 4% | 3% | -1 |

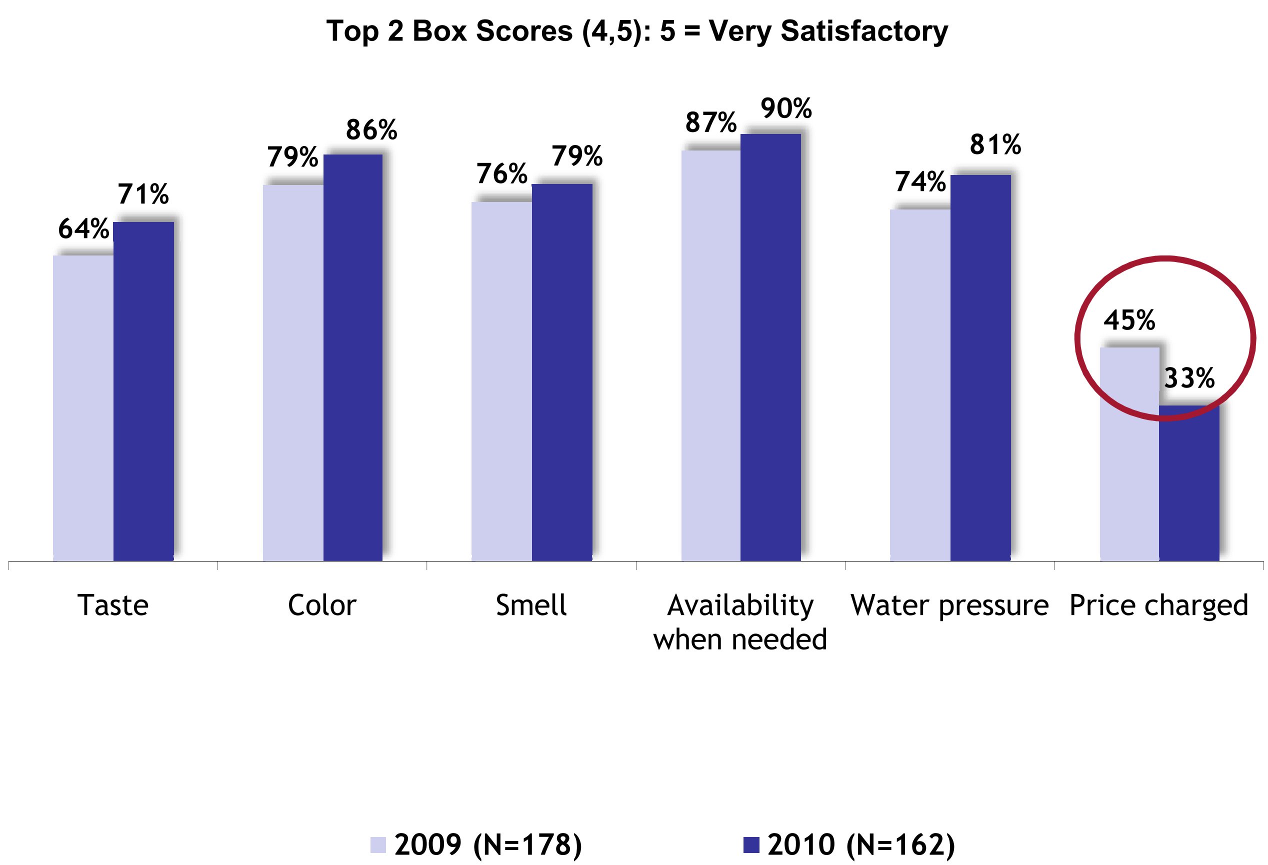
*NOTE: Data in orange shaded cell indicate a significant change/difference compared to 2009.*

*A1. What is the name of the company that provides water and/or waste water service to your household/business?*
*A2. How would you describe your water and/or waste water service company and the services it provides?*

# Water Services - Satisfaction

Respondents rated the water services they received generally high, even slightly higher than in 2009. *Availability when needed* received the highest top 2 box scores (90%; 4/5, where 5 = very satisfactory) followed by *color* (86%).

*Price charged* received the lowest satisfaction score and was the only area in which customers indicated a significant decrease in satisfaction. Only 33% compared to 45% in 2009 rated it *somewhat* or *very satisfactory*.




*NOTE: Data red circled indicates significant change/ difference compared to 2009.*

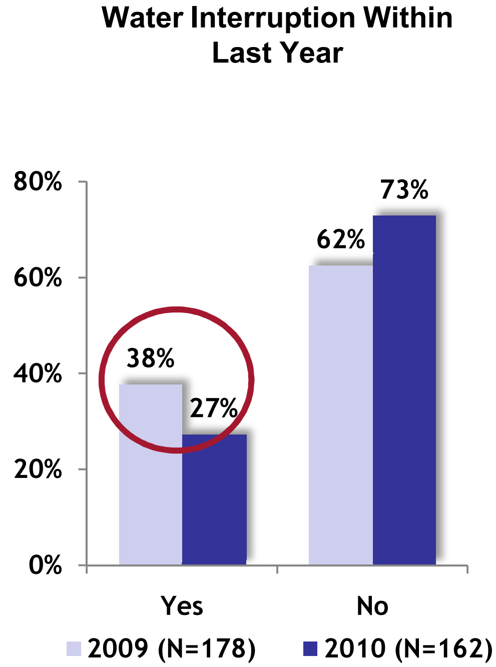
*1. Please rate your water services in the following areas by using a 5-point scale with 5 being "Very Satisfactory" and 1 being "Not Satisfactory At All".*

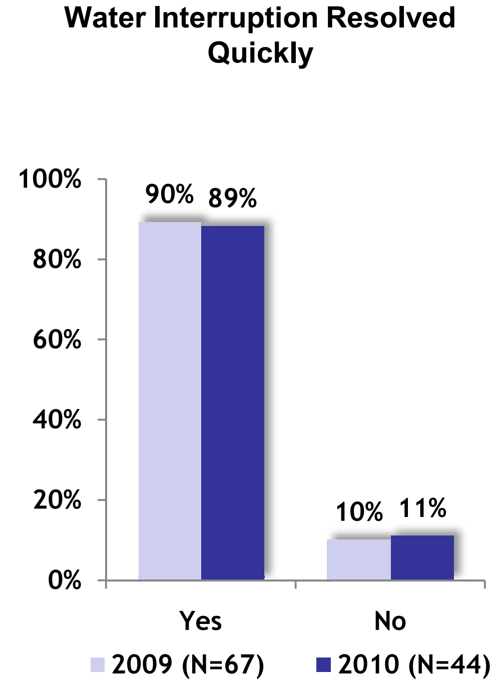
Joe Wilkins – Central US

# Water Services - Interruptions

Compared to 2009 significantly fewer interviewed customers (27% compared to 33% in 2009) reported having experienced a water service interruption in the last year.

Of those with an interruption, 89% stated it had been resolved quickly.




*NOTE: Data red circled indicates significant change/ difference compared to 2009.*

*2. Within the last year, have you had any interruptions to your water service?*
*3. Was your water service interruption problem resolved quickly?*
*4. Being as detailed as possible, please tell us how and why your water interruption problem was not resolved quickly.*

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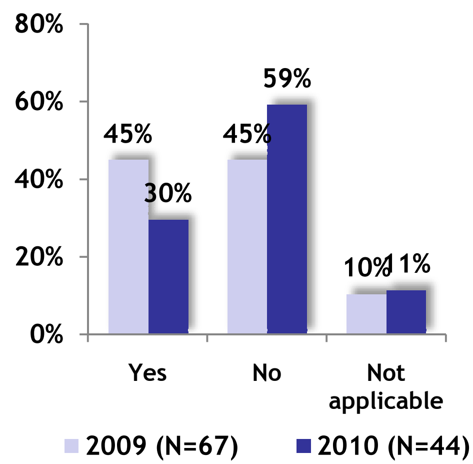
# Water Services – Interruptions Notification

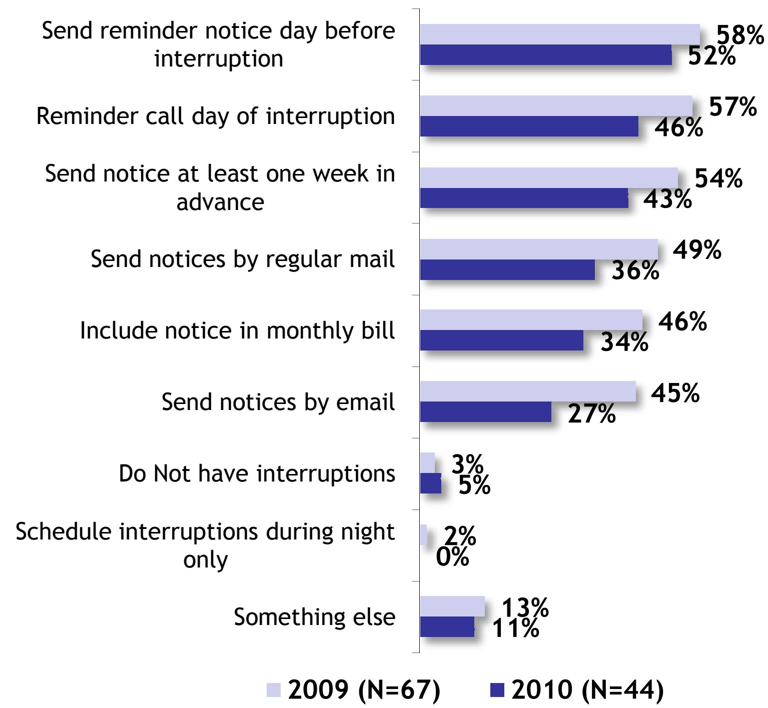
Of those who had a water interruption in the last year, 30% stated they had received advance notification (down from 45% in 2009).

In terms of improvements for scheduled service interruptions, all types of communications were still considered important but with overall slightly fewer mentions compared to last year. On the top of the list remained *send a notice day before interruption* (52%) and *reminder call day of interruption* (46%).

**Advance Notification of Water Interruptions**




**Improvements of Notifications of Scheduled Service Interruptions**




*5. Are you notified in advance when scheduled interruptions to water service will occur?*

*6. In which of the following ways could [INSERT FACILITY BASED ON ZIP CODE] improve their notifications of scheduled service interruptions? You may select all that apply.*

Joe Wilkins – Central US

# Water Services – Improvements

When asked about suggestions to improve the water service 61% respondents (slightly up from 56% in 2009) stated they had *no suggestions/fine as is.*

The suggestion most often mentioned (22% of respondents) was to *lower rates/don't increase rates*. Secondly, 11% of respondents would like better *water filtration*.

| Suggestions for Improvements | 2009 (N=178) | 2010 (N=162) | Difference from 2009 (percent points) |
|---|---|---|---|
| Lower rates/don't increase rates | 20% | 22% | +2 |
| Water filtration (improve taste/smell/color)/soften water | 8% | 11% | +3 |
| Improve water pressure | 11% | 3% | -8 |
| No suggestions/fine as is | 56% | 61% | +5 |

*NOTE: Data in orange shaded cell indicate a significant change/difference compared to 2009.*

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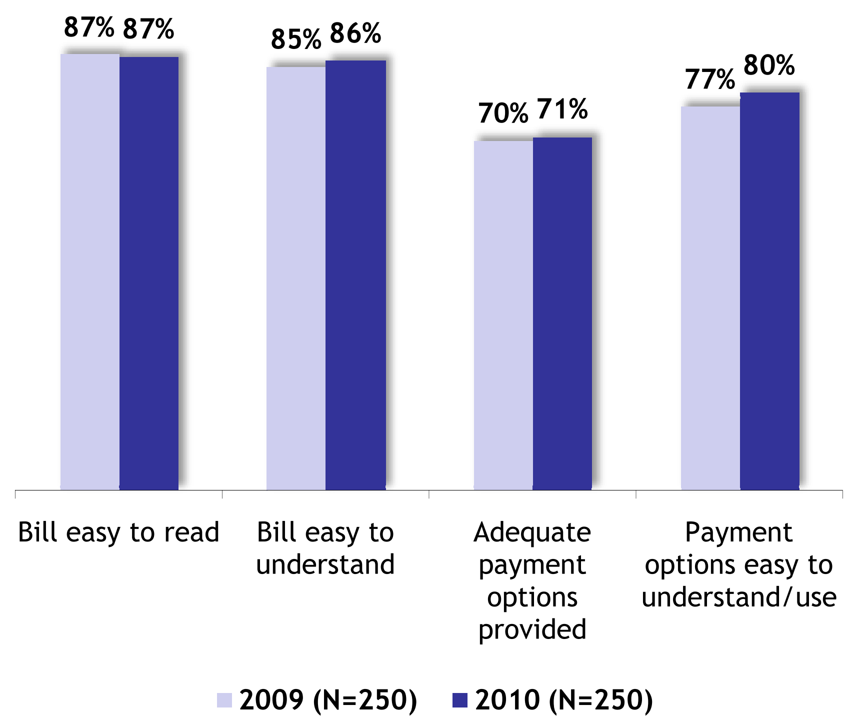
*7. Do you have any suggestions on how [INSERT FACILITY BASED ON ZIP CODE] could improve their water services?*

Joe Wilkins – Central US

# Customer Billing - Satisfaction

The Central US facilities received high satisfaction scores on their customer billing with all ratings level or slightly up compared to 2009. Respondents agreed that the bill was *easy to read* (87% agree/strongly agree) and *easy to understand* (86% each).

**Top 2 Box Scores (4,5): 5 = Strongly Agree**




*8a. Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements.*

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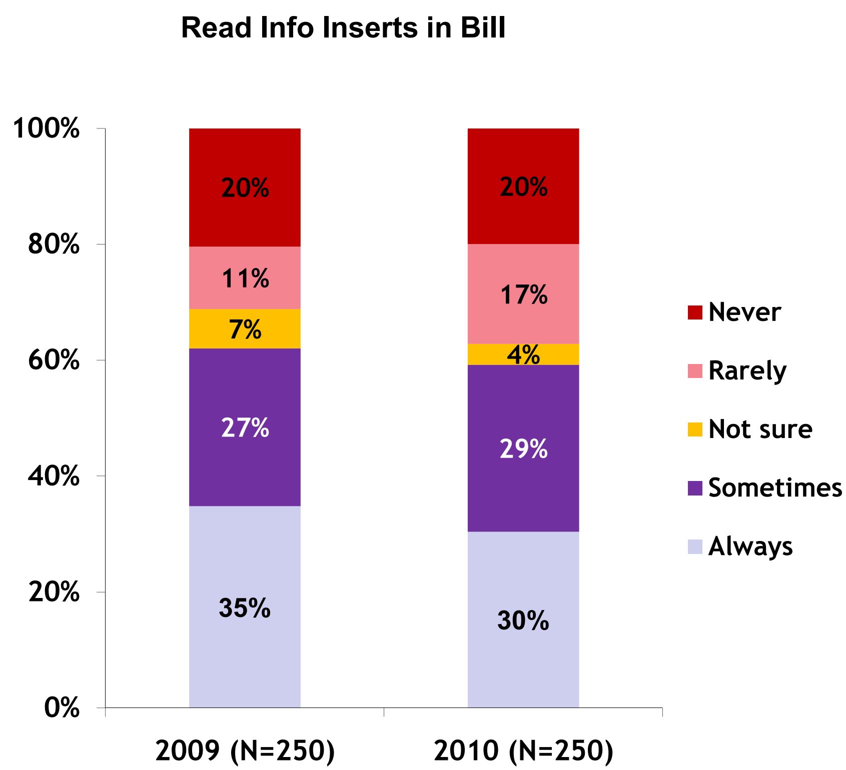
Joe Wilkins – Central US

# Customer Billing – Information/Services

A total of 59% of respondents (slightly fewer than in 2009 (62%)) stated they read information inserts included with their bill *sometimes* or *always,* while 37% read the information *rarely* or *never.*




*9. How often do you read the informational inserts included in your bill?*

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# Customer Billings – Improvements

While 82% of respondents did not have any suggestions on how to improve customer billing, *lower rates/don't increase rates* was mentioned by 8% of respondents (slightly up from 6% in 2009). Other improvements were *make bill easier to understand* significantly up to 4%, while *improve or implement electronic/ online/ paperless billing* saw a significant decrease by 6% points.

| Suggestions for Improvements | 2009 (N=250) | 2010 (N=250) | Difference from 2009 (percent points) |
|---|---|---|---|
| Lower rates/don't increase rates | 6% | 8% | +2 |
| Make bill easier to understand | 0.4% | 4% | +3.6 |
| Improve or implement electronic/online/paperless billing | 7% | 1% | -6 |
| No suggestions/fine as is | 78% | 82% | +4 |

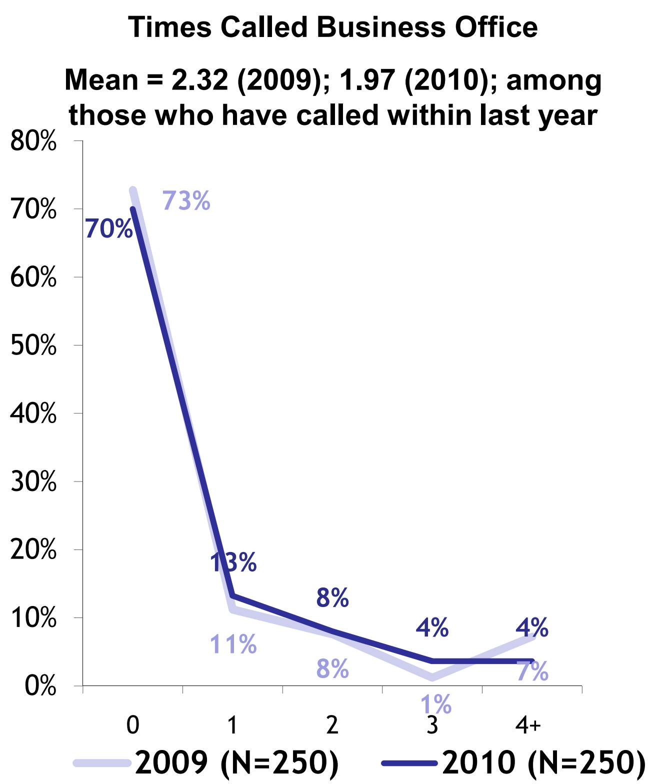
*NOTE: Data in orange shaded cell indicate a significant change/difference compared to 2009.*

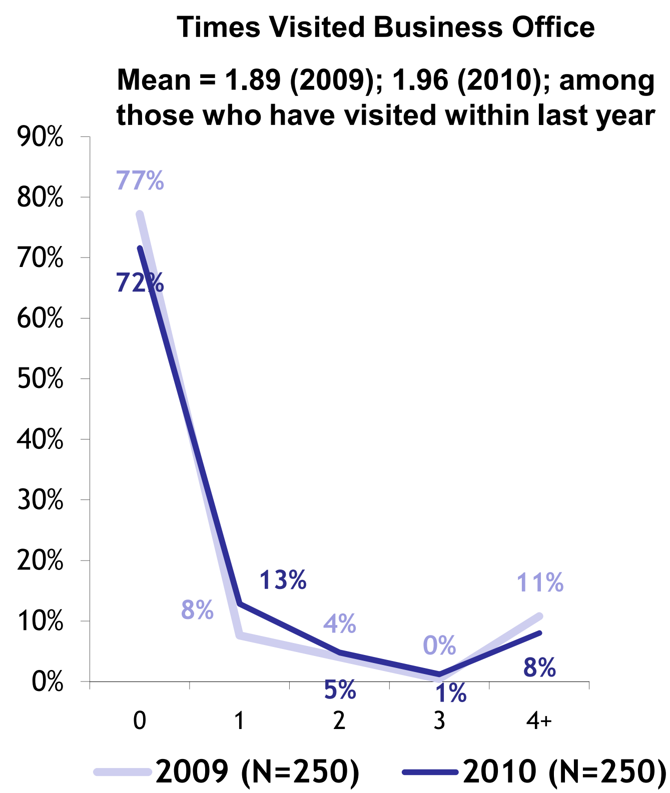
*11. Do you have any suggestions for improving the billing?*

Joe Wilkins – Central US

# Customer Service – Calls & Visits

The majority of respondents did not call (70%) or visit (72%) the business office within the last year. Respondents who had contacted the business office had both called or visited the office on average 2 times.




*11. To the best of your recollection, how many times have you called or visited the [INSERT FACILITY BASED ON ZIP CODE] business office within the last year?*

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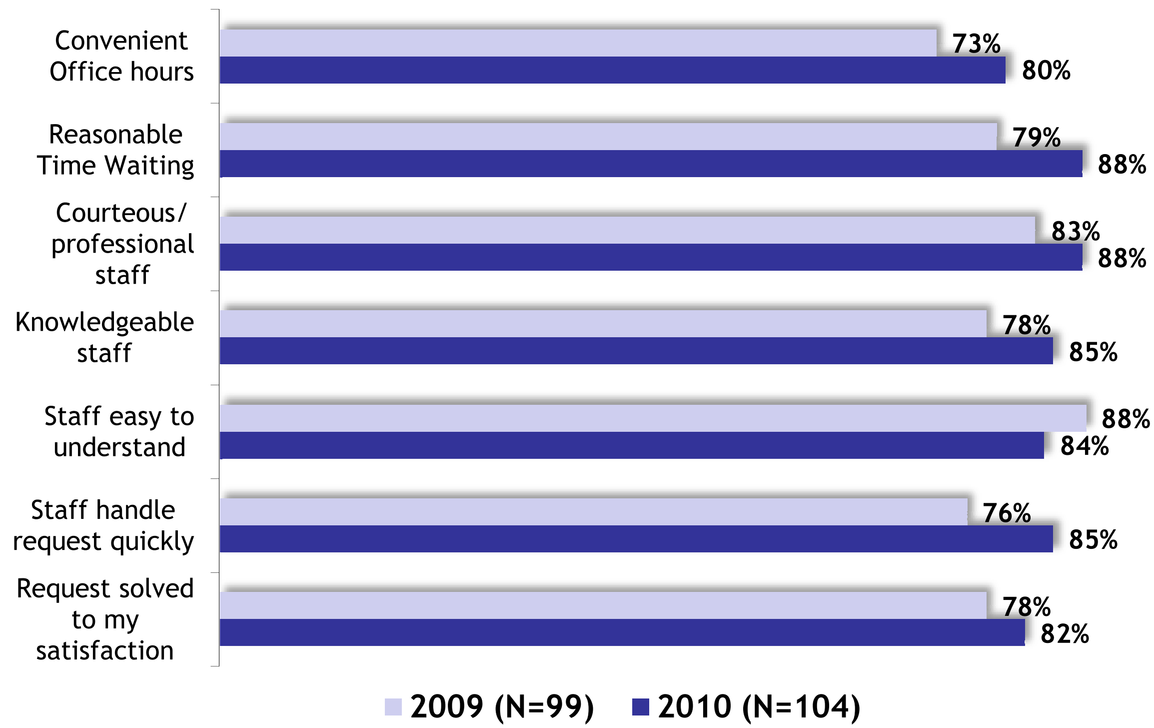
Joe Wilkins – Central US

# Customer Service - Satisfaction

All aspects of customer service tested were rated very positively and slightly above their 2009 levels with 80% or more of respondents reporting agreement (*agree/strongly agree*) that customer service performed well.

**Top 2 Box Scores (4,5): 5 = Strongly Agree**




*12a. Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements about [INSERT FACILITY BASED ON ZIP CODE]'s customer service. If you have called or visited the office more than once in the last year, please think only about your last contact with the [INSERT FACILITY BASED ON ZIP CODE] business office.*

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Joe Wilkins – Central US

# Customer Service – Hours & Wait Time

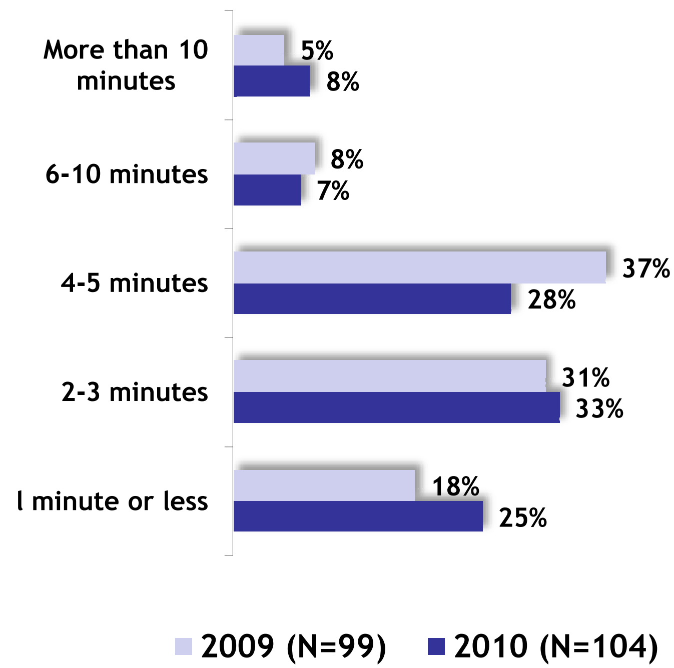
When asked about more convenient office hours, 23% of respondents mentioned *later opening hours/past 5PM* during the week. *Earlier hours/before 8AM* was requested by 2% of respondents and *Saturday hours* were desired by 5%.

A total of 58% felt that wait time should not be more than 3 minutes.

| More Convenient Time | 2009 (N=54) | 2010 (N=57) | Difference from 2009 (percent points) |
|---|---|---|---|
| Weekday hours: late open/past 5PM | 26% | 23% | -3 |
| Saturday hours: half/full day | 7% | 5% | -2 |
| Weekday hours: early open/before 8AM | 6% | 2% | -4 |
| Office hours are fine | 28% | 32% | +4 |

**Acceptable Wait Time for Live Person**

**Mean = 3.68 minutes (2009); 3.32 minutes (2010)**




*12b. What would you consider more convenient office hours?*

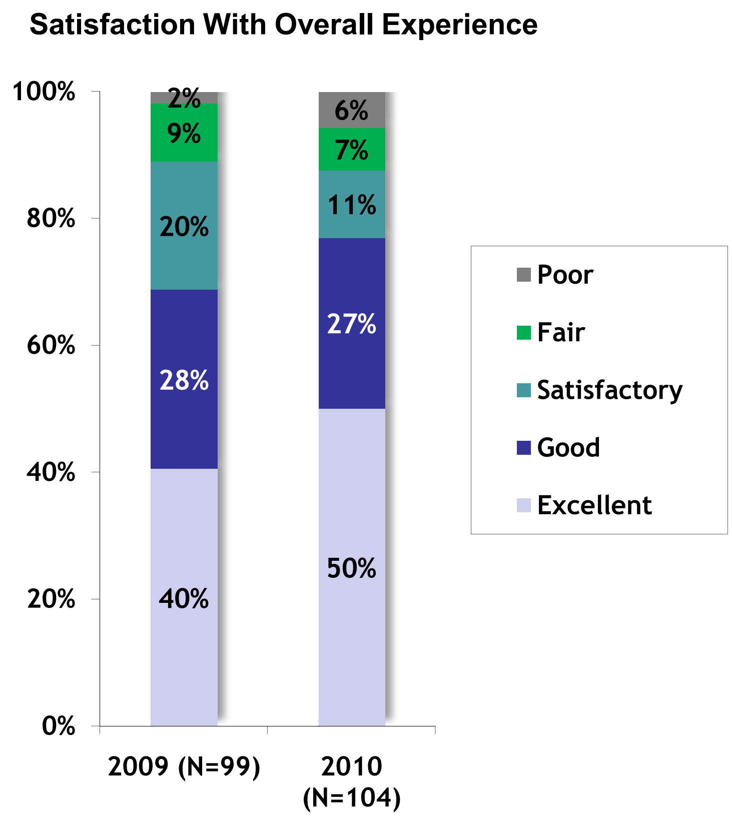
*12c. How long are you willing to wait to speak to a live person?*

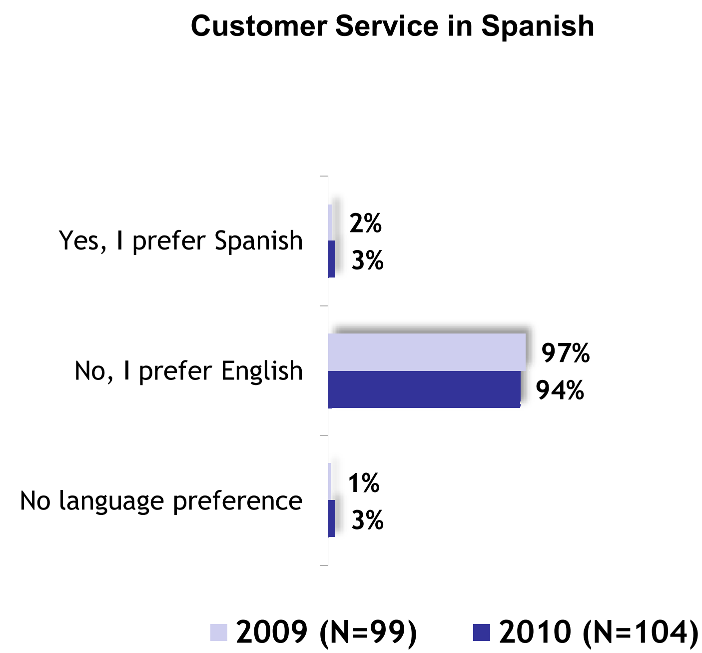
# Customer Services – Overall Experience

Joe Wilkins – Central US

Overall customer service experience was rated well with 77% of respondents (slightly up from 68% in 2009) stating it was *excellent* or *good*.

A very small number of respondents (3%) preferred customer service communications in Spanish.




*13. Overall, how would you rate your experience with the customer service you received? If you have called or visited the office more than once in the last year, please think only about your last contact with the [INSERT FACILITY BASED ON ZIP CODE] business office.*

*13a. If customer service were available in Spanish would you take advantage of it?*

Joe Wilkins – Central US

# Customer Service - Improvements

Few suggestions were given on how to improve customer service, most (84%) having no suggestion/stated it was fine as is.

Improvement suggestions were related to staff communications: *improve communications with customers* (4%) and *be more polite/ friendly/ understanding* (4%).

| Suggestions for Improvements | 2009 (N=99) | 2010 (N=104) | Difference from 2009 (percent points) |
|---|---|---|---|
| Improve communication w/customers (service follow-up, shut offs, etc) | 0% | 4% | +4 |
| Be more polite/ friendly/ understanding | 0% | 4% | +4 |
| Lower the rates/don't increase rates | 3% | 3% | 0 |
| Speak English better/English as a default language | 0% | 2% | +2 |
| Be more professional/ knowledgeable | 5% | 2% | -3 |
| No suggestions/fine as is | 81% | 84% | +3 |

*NOTE: Data in orange shaded cell indicate a significant change/difference compared to 2009.*

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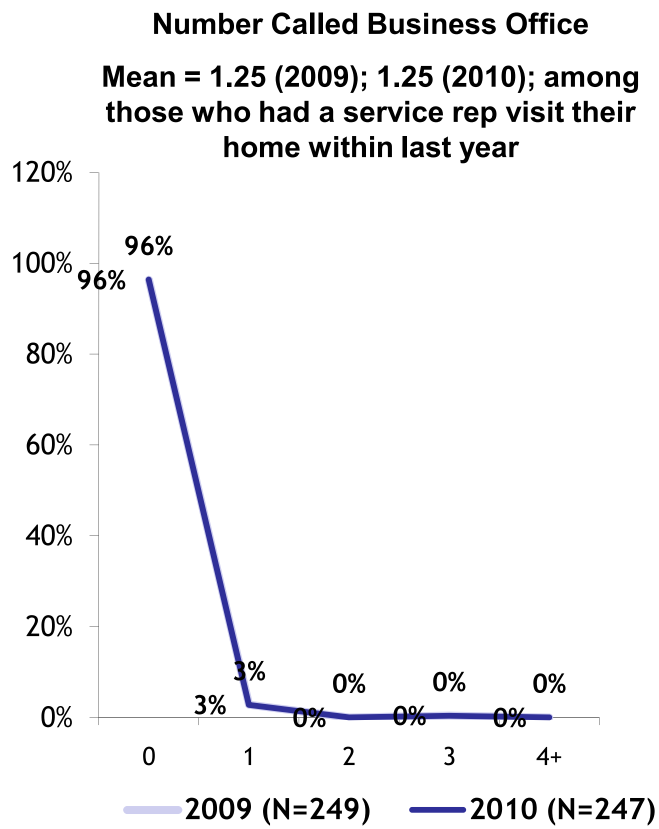
*14. Do you have any suggestions for improving customer service?*

Joe Wilkins – Central US

# Service Rep Home Visits

Only very few respondents (3% = 8 respondents) had received a service representative home visit within the last year.




*14b. How many times has an [INSERT FACILITY BASED ON ZIP CODE] employee visited your home to resolve a problem within the last year?*

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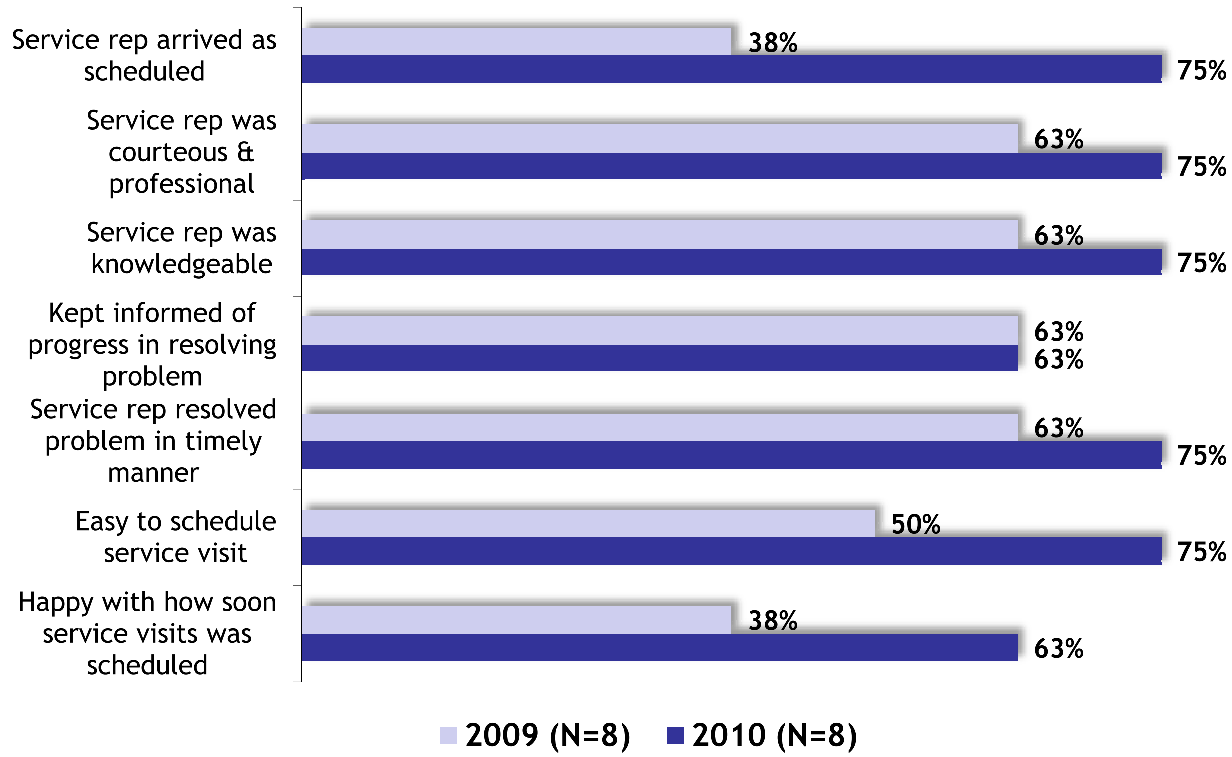
# Service Rep Home Visits - Satisfaction

Among the few respondents (8) who had a service representative visit, satisfaction was high across all aspects. Because the sample size is very small, it is difficult to make reliable trending evaluations.

**Top 2 Box Scores (4,5): 5 = Strongly Agree**



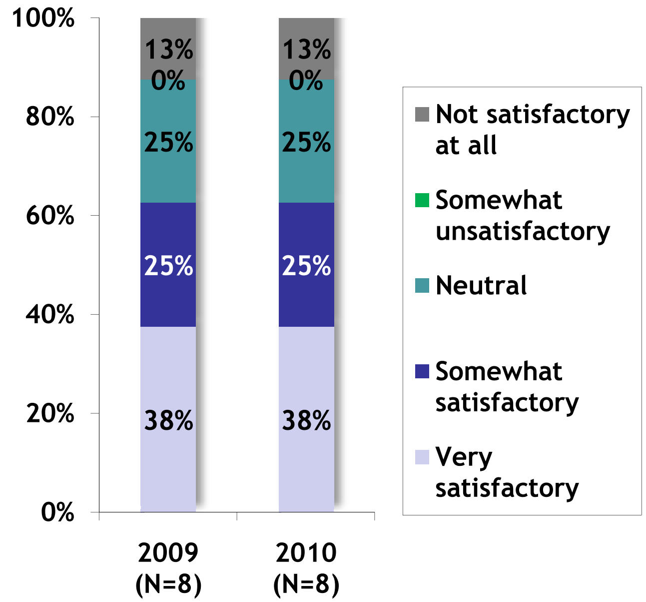

*15. Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements about your in home service visit. If an [INSERT FACILITY BASED ON ZIP CODE] employee has visited your home more than once within the last year, please think only about your last visit.*

Joe Wilkins – Central US

# Service Rep Home Visits – Overall Satisfaction & Improvements

Among the 8 respondents with a home visit, overall satisfaction remained high with 63% of respondents stating they were *somewhat* or *very satisfied* with their experience with the service representatives home visit.

**Overall Satisfaction With Service Visit**




**Suggestions for Improvements (N = 8)**

- Service personnel be more knowledgeable (1 mention)
- No suggestions/fine as is (7 mentions)

*16. Overall, how would you rate your experience with the service visit to your home using a 5-point scale with 5 being "Very Satisfactory" and 1 being "Not Satisfactory At All"? If you had more than one visit in the last year, please think only about your last visit.*

*17. Do you have any suggestions for improving home visits?*

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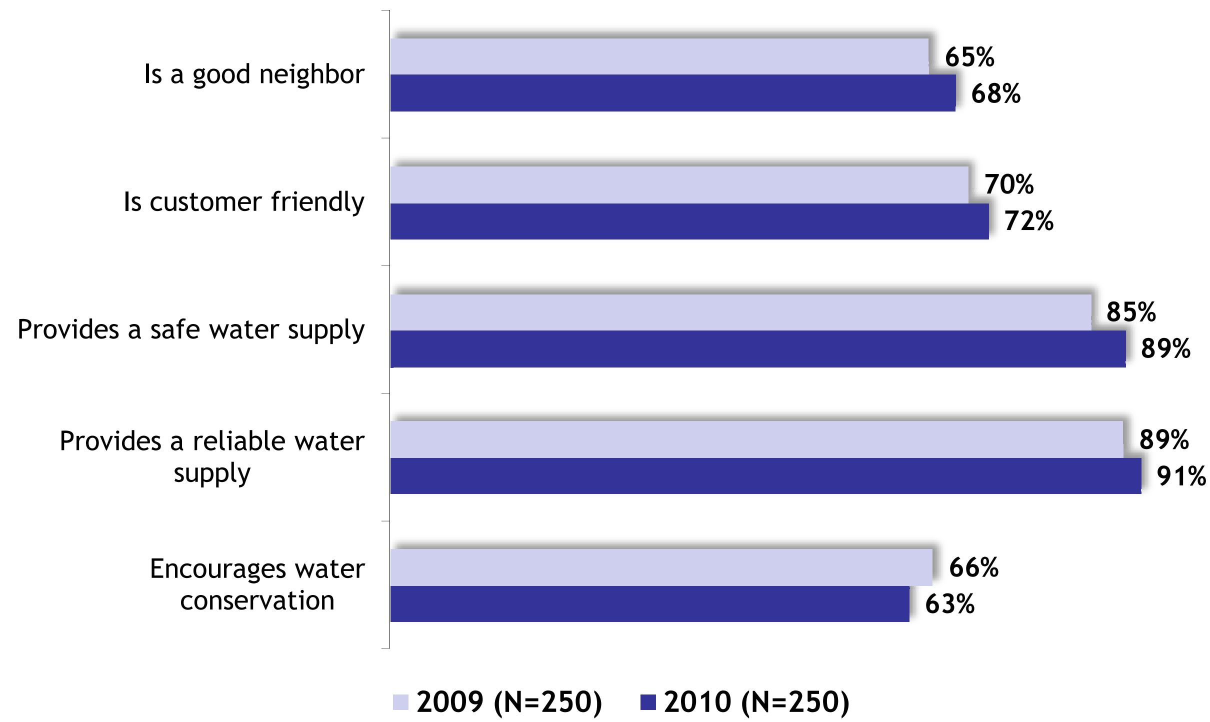
Joe Wilkins – Central US

# Company Evaluation - Satisfaction

For the overall company evaluation, the Central US facilities received high scores for *provides a reliable water supply* (91%, top 2 box score: *agree/strongly agree*) and *provides a safe water supply* (89%). The other aspects received good agreement scores as well, with most slightly above the 2009 levels.

**Top 2 Box Scores (4,5): 5 = Strongly Agree**




*18. Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements about [INSERT FACILITY BASED ON ZIP CODE].*

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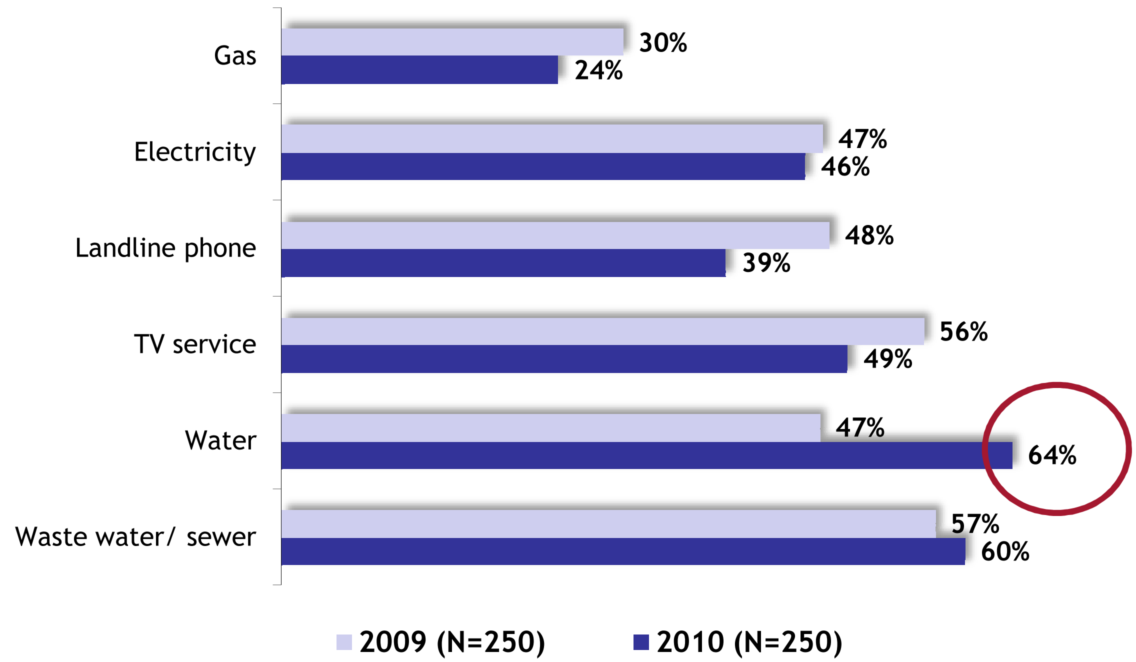
Joe Wilkins – Central US

# Company Evaluation – Rates for Utilities

*Waste water/sewer* and *water* were the services that most respondents felt were priced high or much too high (60% and 64%, respectively). *Water* saw a significant increase in customers who felt the rates were somewhat/ much too high (64% vs. 47% in 2009).

Given the recent rate increases, it was not surprising that customers serviced by the Woodmark and Tall Timbers facility were more likely to be dissatisfied with their waste water/ sewer rates. 76% and 66% of interviewed customers stated their waste water/sewer rates were somewhat/much too high.

**Top 2 Box Scores (4,5): 5 = Much Too High**




*NOTE: Data red circled indicates significant change/ difference compared to 2009.*

*19. For each of the following utility services, please indicate if you feel the rates charged are much too high, somewhat too high, just right, somewhat low, or very low.*

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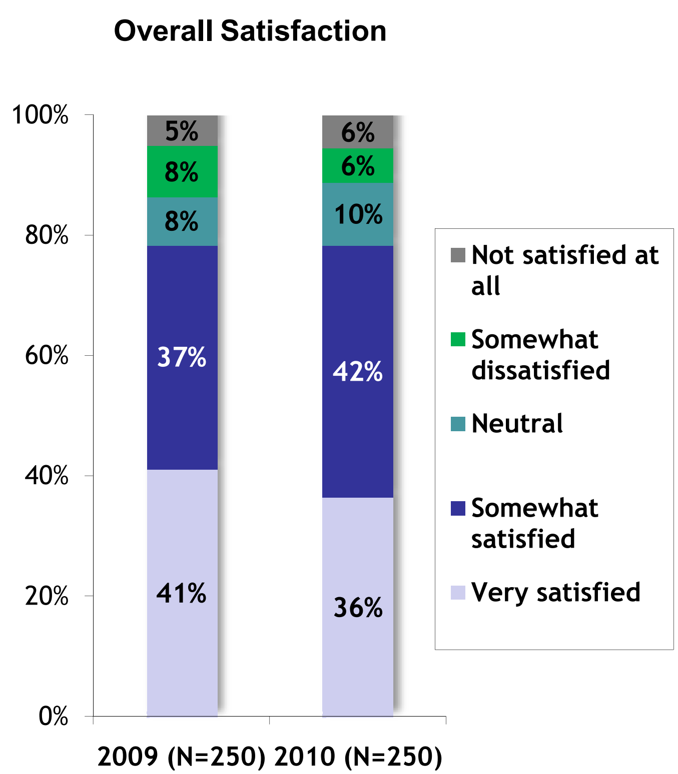
# Company Evaluation – Overall Satisfaction

The majority of respondents (78%) were *somewhat* or *very satisfied* with their Central US company providing water/ waste water to them. Only 12% of respondents were dissatisfied.

While many reasons for satisfaction centered around *satisfactory/ good /excellent service* (11%), *service is adequate* (5%) and *good/ friendly/ courteous customer service* (7%), cost concerns were a very important issue even among those satisfied (mentioned by 29% up from 8% in 2009). Three out of four (75%) of those dissatisfied stated *cost is too high/rate* as reason for their dissatisfaction. Other reasons were *water is cloudy/ contaminated/ poor quality/ hard* (14%) and *poor/ unfriendly/ uncaring customer service* (11%).




| | 2009 | 2010 | Difference from 2009 (percent points) |
|---|---|---|---|
| **Why Satisfied** | N=196 | N=196 | |
| Cost is too high/rate increases | 8% | 29% | +21 |
| Service is satisfactory/good/excellent | 19% | 11% | -8 |
| Good/friendly/courteous customer service | 6% | 7% | +1 |
| Service is adequate | 0.5% | 5% | +4.5 |
| Cost is reasonable | 10% | 3% | -7 |
| Reliable/receive services paid for/no service interruptions | 8% | 3% | -5 |
| **Why Not Satisfied** | N=34 | N=28 | |
| Cost is too high/rate increases | 56% | 75% | +19 |
| Water is cloudy/contaminated/poor quality/hard | 15% | 14% | -1 |
| Poor/unfriendly/uncaring customer service | 12% | 11% | -1 |
| Low/fluctuating water pressure | 12% | 7% | -5 |
| Shutoff with no notice | 0% | 7% | +7 |

*NOTE: Data in orange shaded cell indicate a significant change/ difference compared to 2009.*

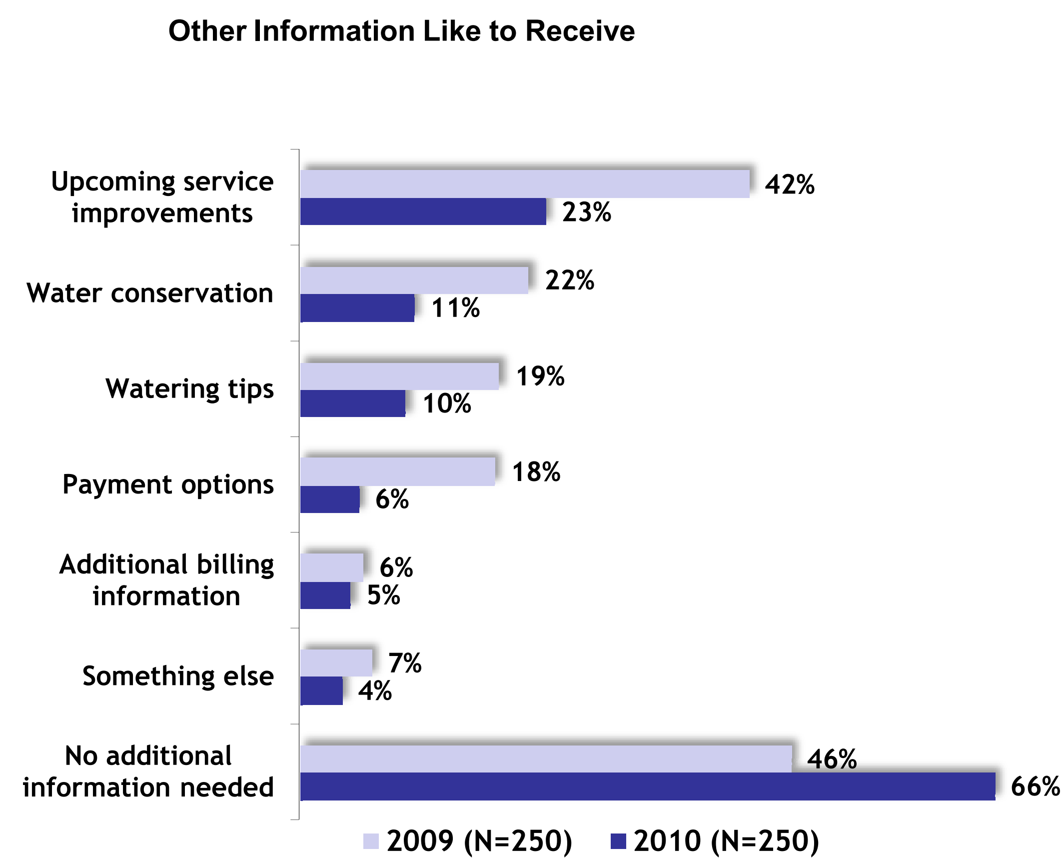
*20. Overall, how satisfied are you with [INSERT FACILITY BASED ON ZIP CODE]?*

*20a. Being as specific as possible, why did you say you are [INSERT FROM Q20] with [INSERT FACILITY BASED ON ZIP CODE]?*

# Company Evaluation - Information

In terms of additional information 66% respondents stated they had no need for additional information, significantly up from 46% in 2009.

The top information respondents would like to receive was *info on upcoming service improvements,* selected by 23%.




*21. What other information would you like to receive from [INSERT FACILITY BASED ON ZIP CODE]? You may select all that apply.*