



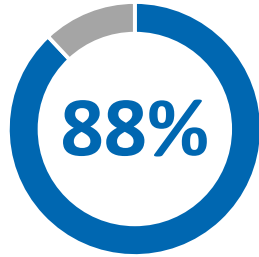
SAN JUAN WATER  
S I N C E 1 8 5 4

# San Juan Water District

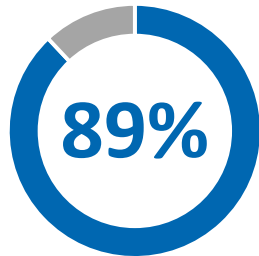
## *Retail Customer Survey*

***Key Findings of a Survey Conducted:  
June 6-18, 2018***

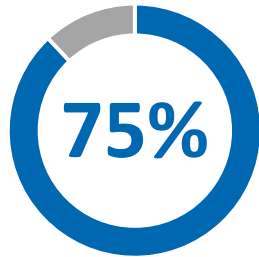
# Big Takeaways...



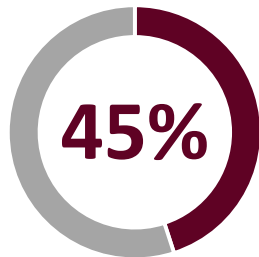
Satisfied with the overall services provided by the San Juan Water District



Satisfied with their customer service interactions



Feel well-informed about capital improvement projects



Do not feel the amount they pay for their water service is "reasonable"

# Survey Methodology



- ✓ 697 telephone and online interviews with retail customers in the San Juan Water District
- ✓ Interviews conducted June 6-18, 2018
- ✓ Interviews online, on landlines and cell phones
- ✓ Margin of sampling error of  $\pm 3.7\%$  at the 95% confidence level
- ✓ Some percentages may not sum to 100% due to rounding

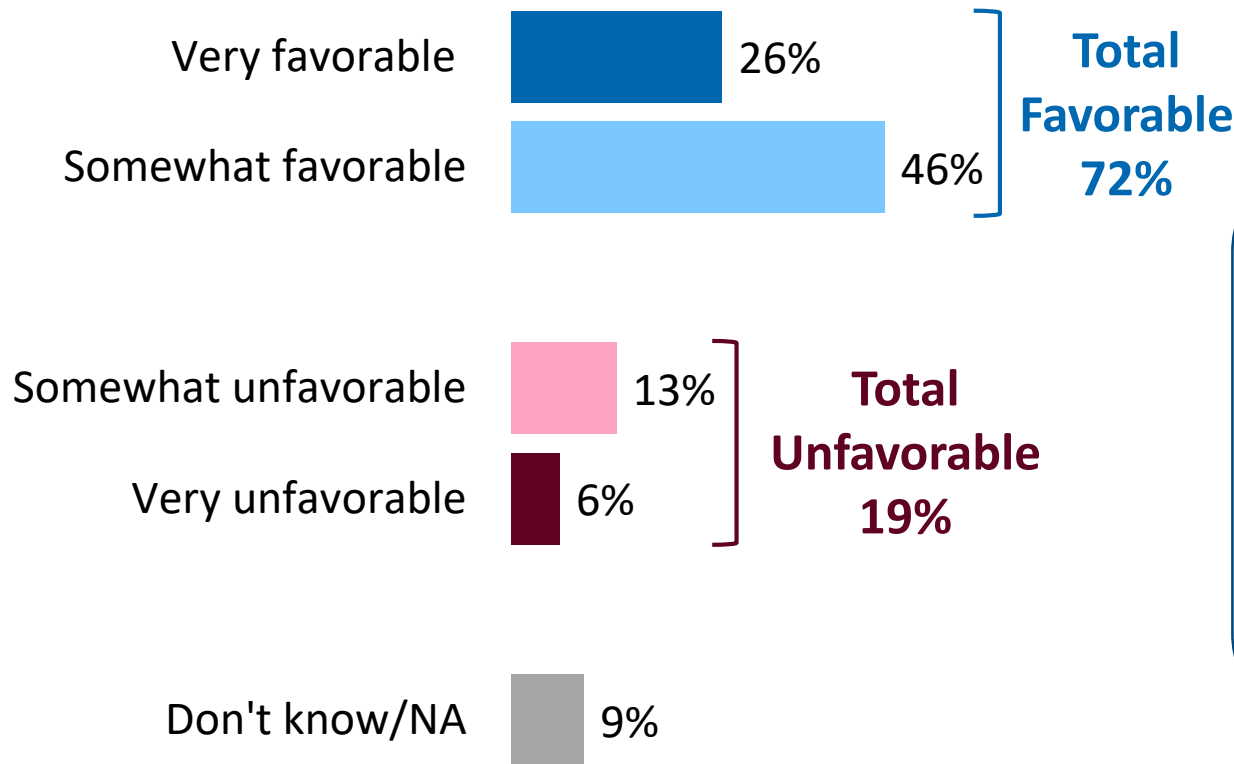


# General Perceptions of the District



# Three-quarters of customers view the District favorably.

*Do you have a generally favorable or unfavorable opinion of the San Juan Water District?*

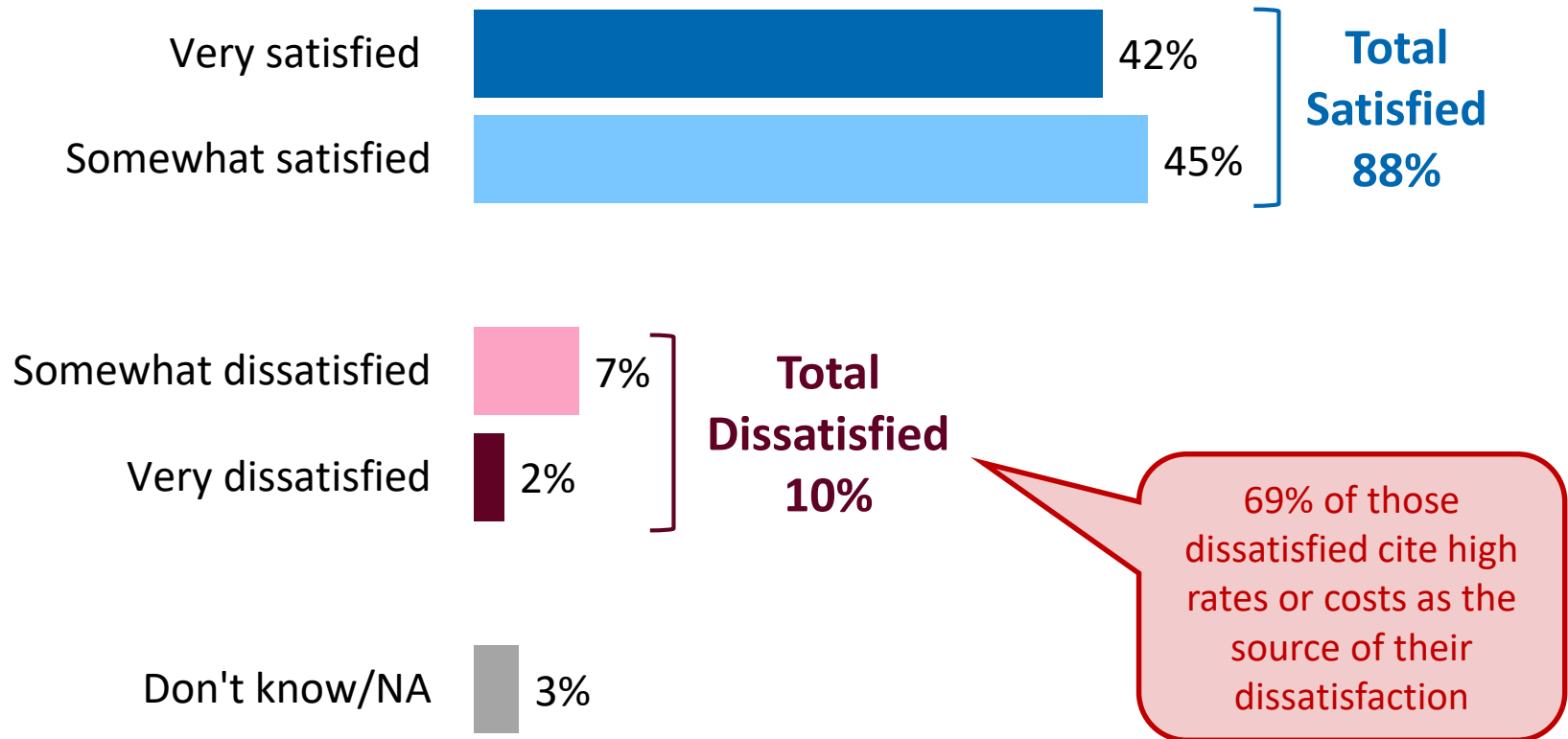


*Those most likely to view SJWD favorably are:*

- Renters
- People of Color
- Over Age 65
- Have household incomes of more than \$100,000

# Nearly nine in ten say they are satisfied with the services provided by the District.

*How satisfied would you say that you are with the overall services provided by the San Juan Water District?*



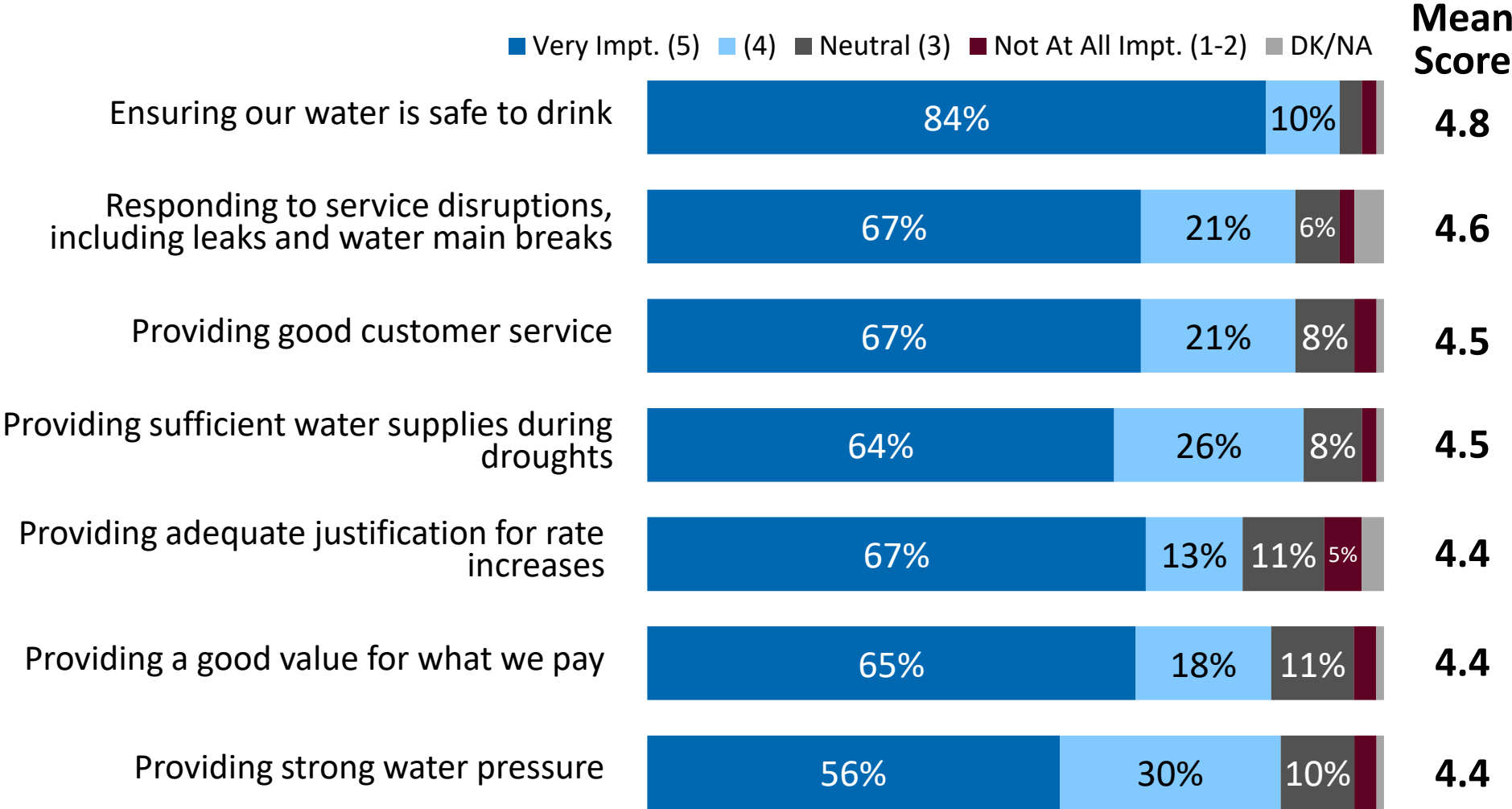




# Specific Service Elements



# Ensuring that drinking water is safe is seen as the most important of the District's responsibilities.

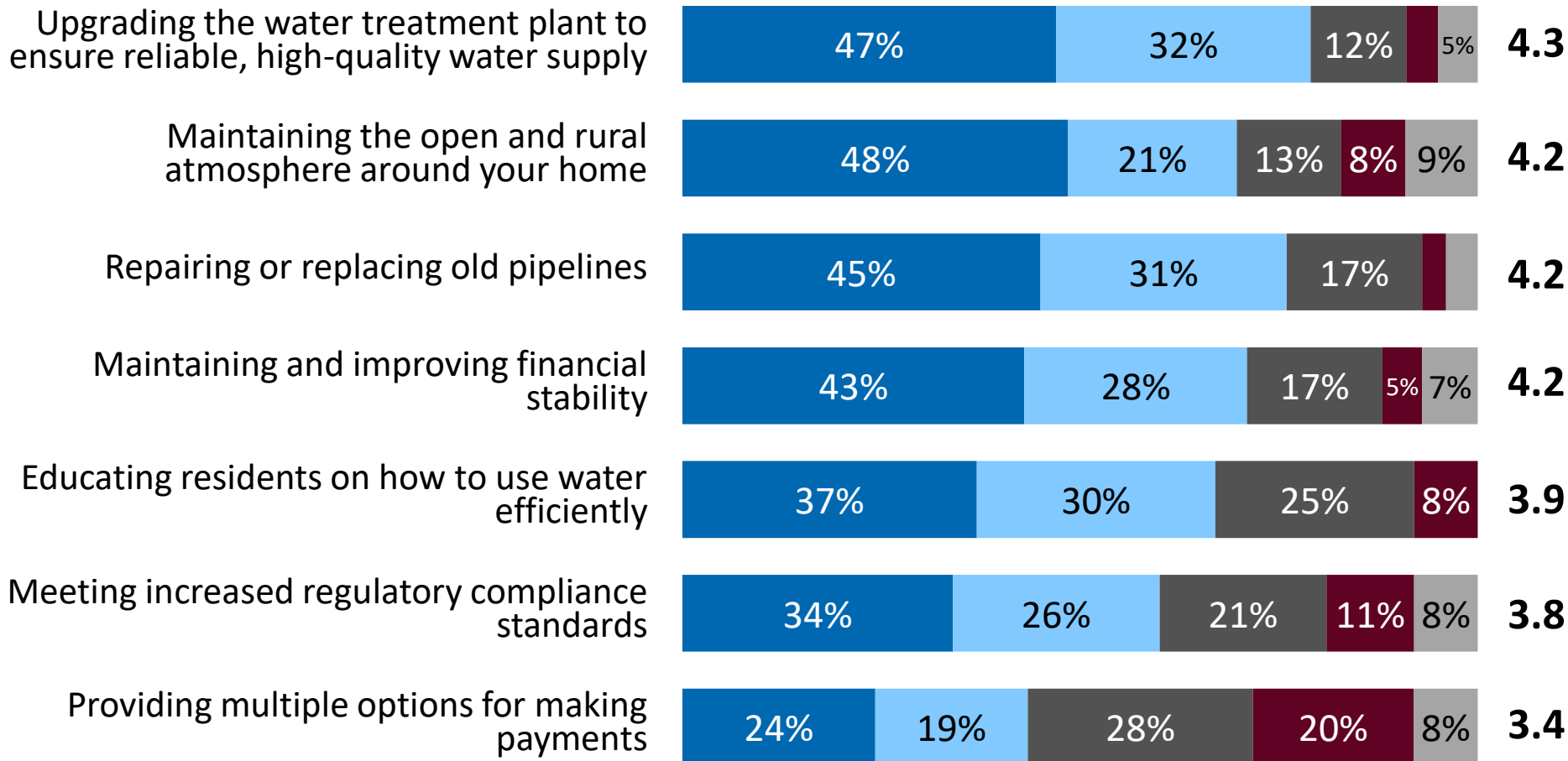




# Multiple options for payments and meeting increased standards rank lowest in terms of importance.

■ Very Impt. (5) ■ (4) ■ Neutral (3) ■ Not At All Impt. (1-2) ■ DK/NA

Mean Score



# Customers are most satisfied with the safety of their drinking water.

■ Very Sat. (5) ■ (4) ■ Neutral (3) ■ Not At All Sat. (1-2) ■ DK/NA

**Mean Score**

Ensuring our water is safe to drink



**4.5**

Responding to service disruptions, including leaks and water main breaks



**4.3**

Providing strong water pressure



**4.2**

Providing good customer service



**4.2**

Providing sufficient water supplies during droughts



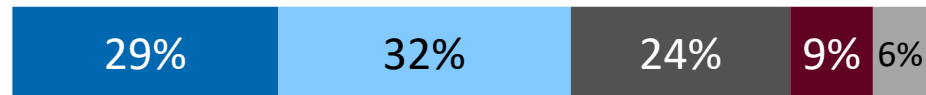
**4.2**

Upgrading the water treatment plant to ensure reliable, high-quality water supply



**4.0**

Educating residents on how to use water efficiently



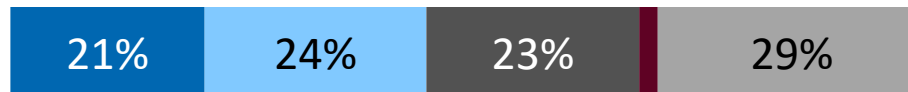
**3.9**

# The greatest dissatisfaction is tied to rate increases.

■ Very Sat. (5) ■ (4) ■ Neutral (3) ■ Not At All Sat. (1-2) ■ DK/NA

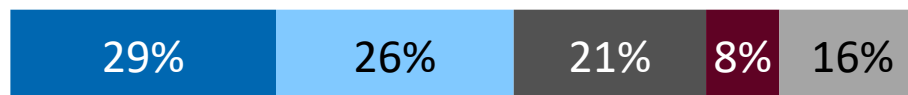
Mean Score

Repairing or replacing old pipelines



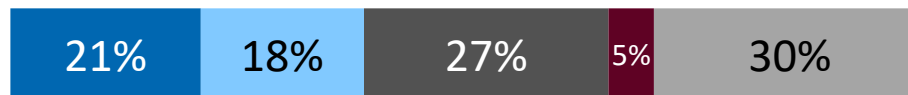
3.9

Maintaining the open and rural atmosphere around your home



3.8

Meeting increased regulatory compliance standards



3.8

Providing multiple options for making payments



3.6

Maintaining and improving financial stability



3.5

Providing a good value for what we pay



3.4

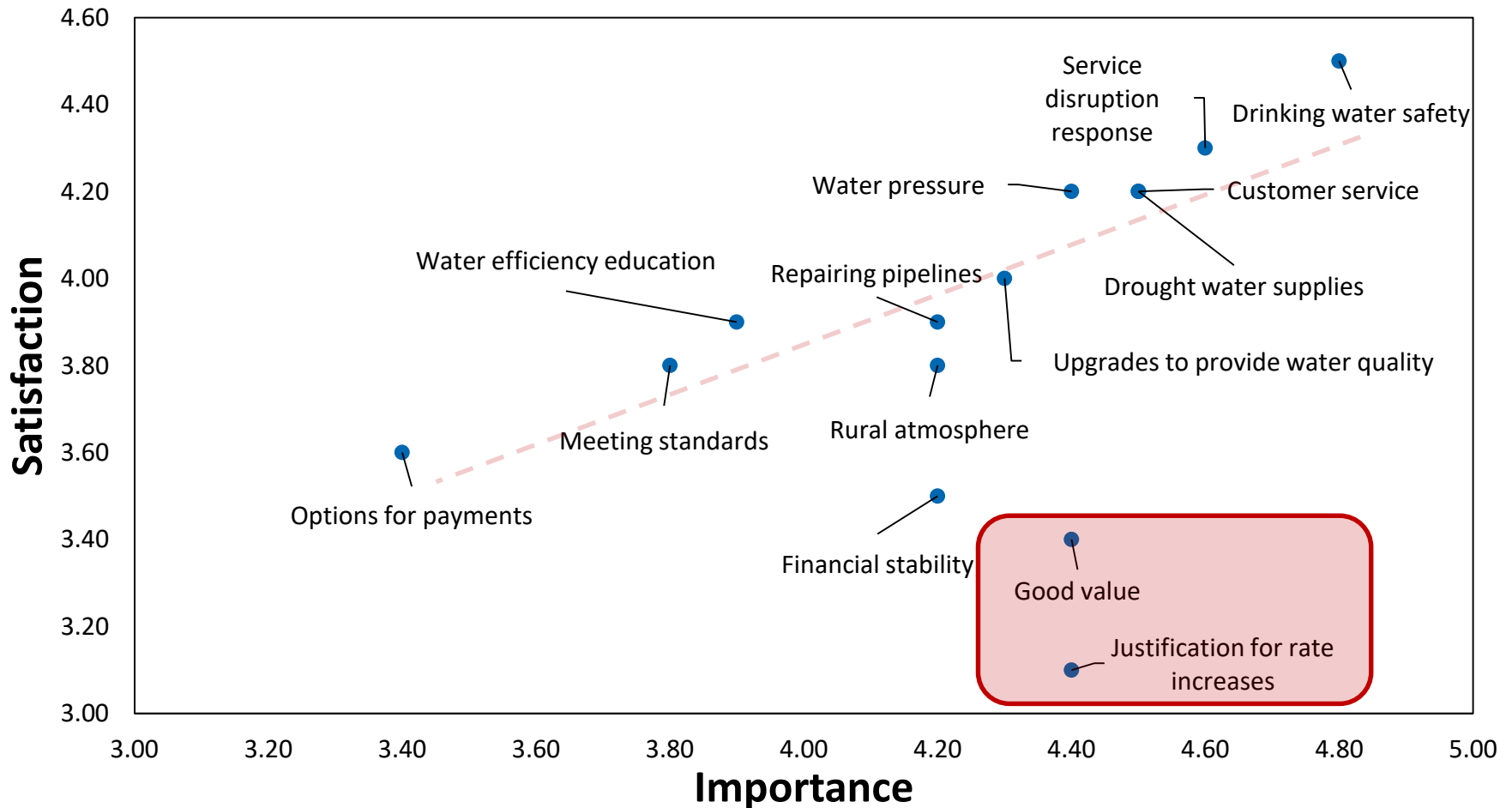
Providing adequate justification for rate increases



3.1

Q8. I'm going to read you the same list of San Juan Water District responsibilities. For each item, please tell me how satisfied you are with the job the Water District is doing, using a 1-5 scale where 1 means you are "not at all satisfied" and 5 means you are "very satisfied." Feel free to use any number from 1-5 to express your opinion. Split Sample

# For most responsibilities, satisfaction tracks with importance; exceptions relate to costs.





SAN JUAN WATER

S I N C E 1 8 5 4

# Satisfaction with Billing

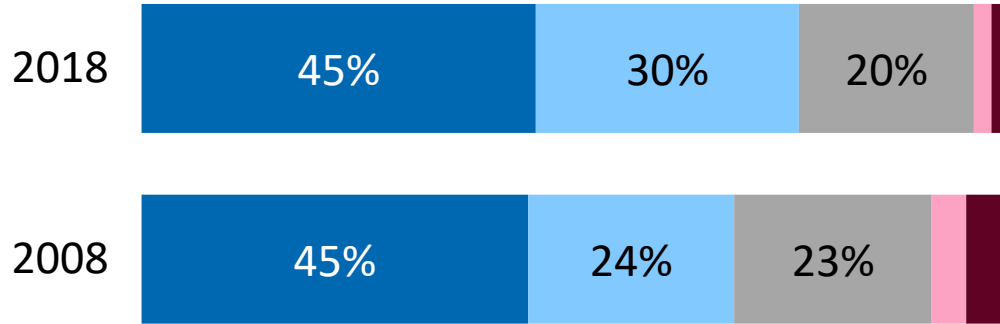


# While perceptions of available payment options have remained consistent, more feel rates are not “reasonable.”

■ Strng. Agree   
 ■ Smwt. Agree   
 ■ Neutral/DK   
 ■ Smwt. Disagree   
 ■ Strng. Disagree

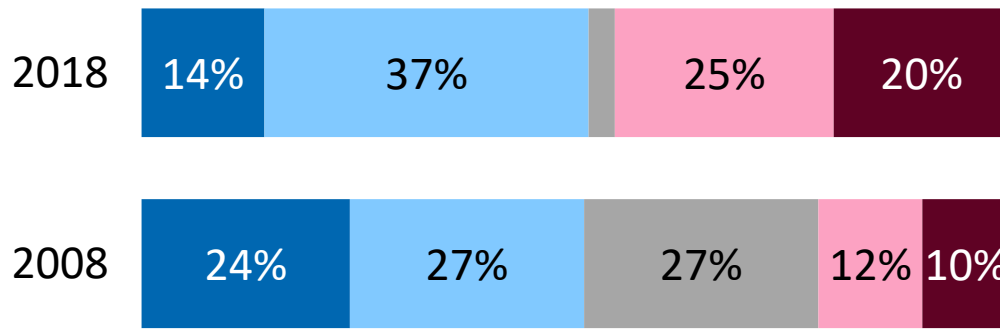
Total Agree   
 Total Disagree

San Juan Water District provides adequate payment options.



75%    5%  
69%    9%

The amount I pay for my water service is reasonable.



52%    45%  
51%    22%

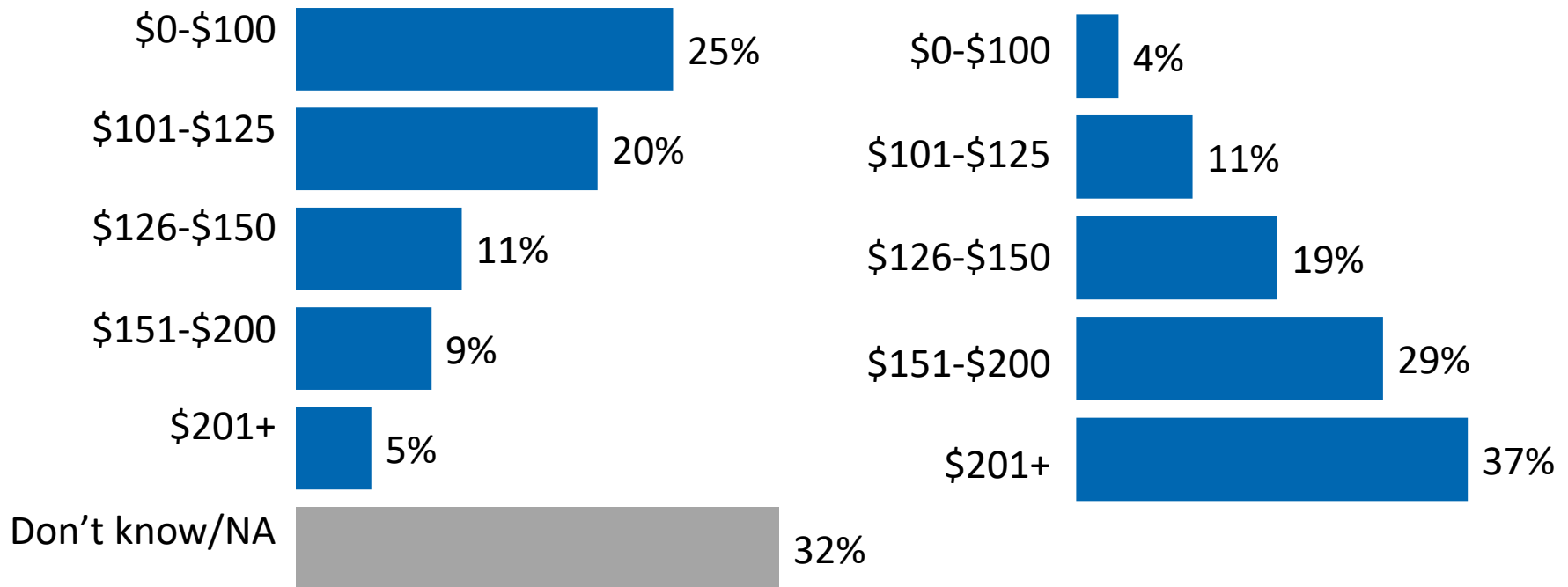


# Despite some concerns about what they pay, many customers underestimate their water bills.

*San Juan Water District customers receive a water bill every two months.*

*How much do you pay per bill?*

*Actual Bill Amount*





# Perceptions of the Water Quality

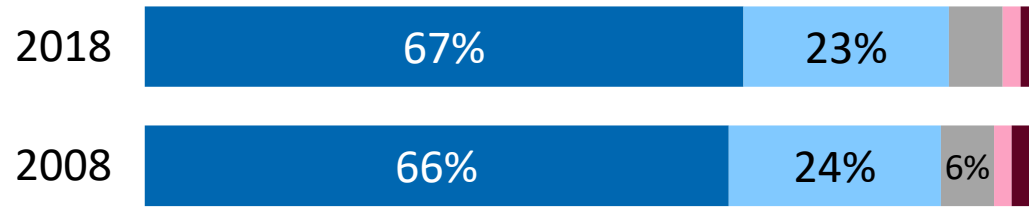


# Water quality perceptions have remained positive over the past decade; water pressure has improved.

■ Strng. Agree 
 ■ Smwt. Agree 
 ■ Neutral DK 
 ■ Smwt. Disagree 
 ■ Strng. Disagree

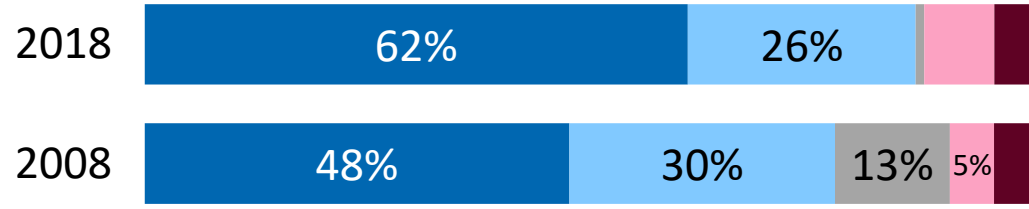
Total Agree
Total Disagree

The water we receive from San Juan Water District is safe to drink.



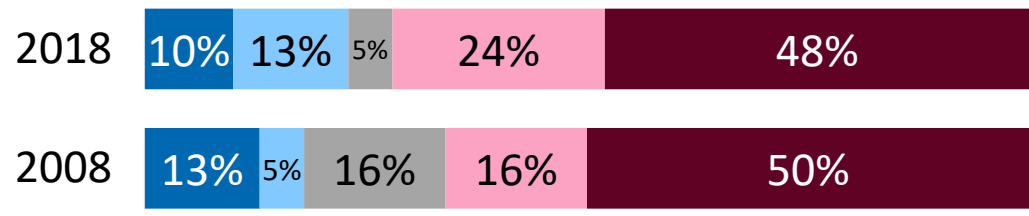
90% 3%  
90% 4%

The water pressure in my home is consistently strong.



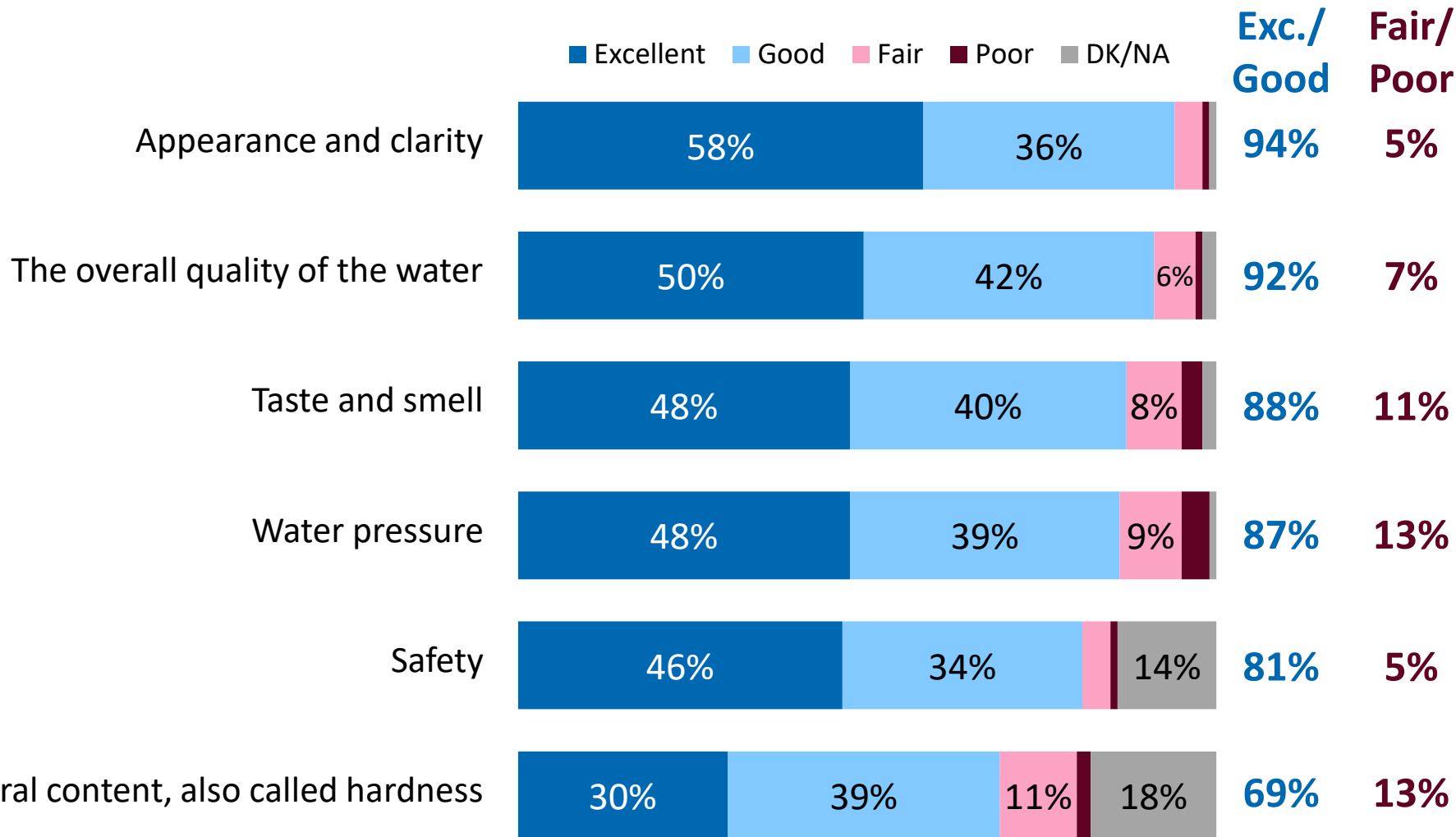
88% 11%  
78% 9%

I would rather drink bottled water than San Juan water.



23% 72%  
18% 66%

# Customers rate a number of the water's attributes highly.



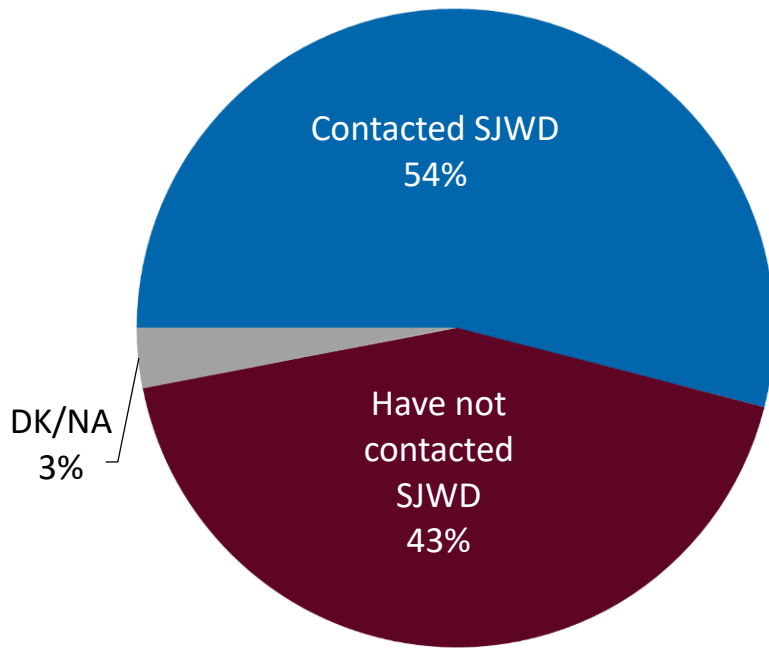


# Experiences with Customer Service

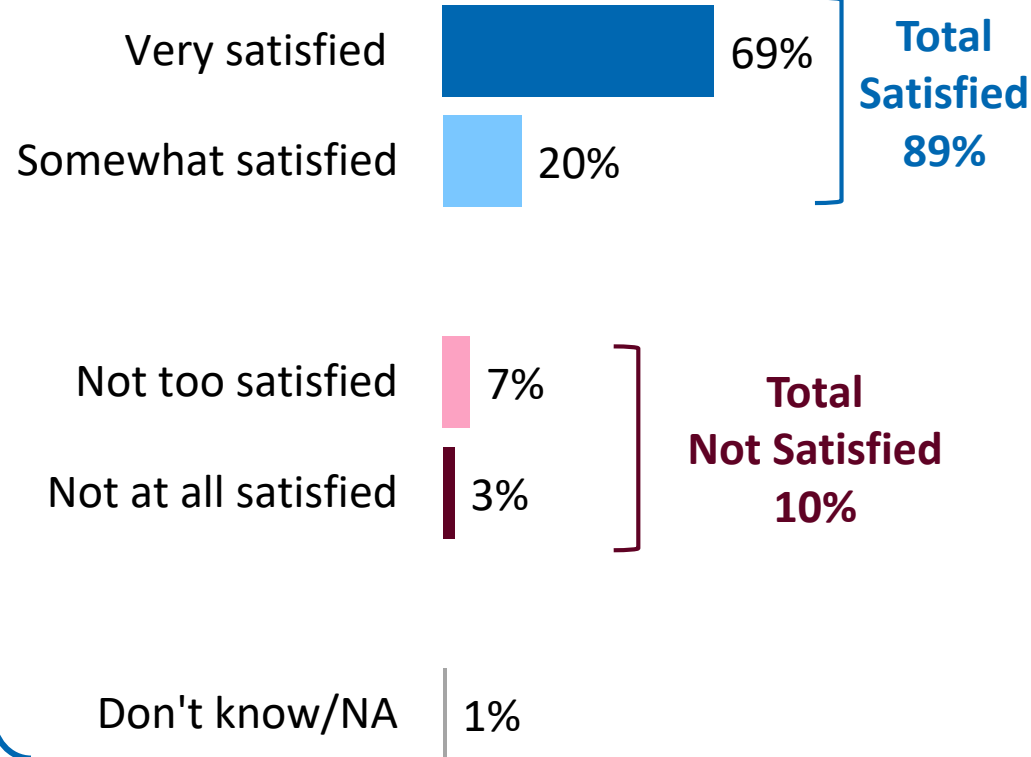


# Nearly all customer services experiences have been positive.

Over the last two years, have you had contact with San Juan Water District customer service?



Would you say that overall, you are very satisfied, somewhat satisfied, not too satisfied, or not at all satisfied with the service you received from San Juan Water District customer service?





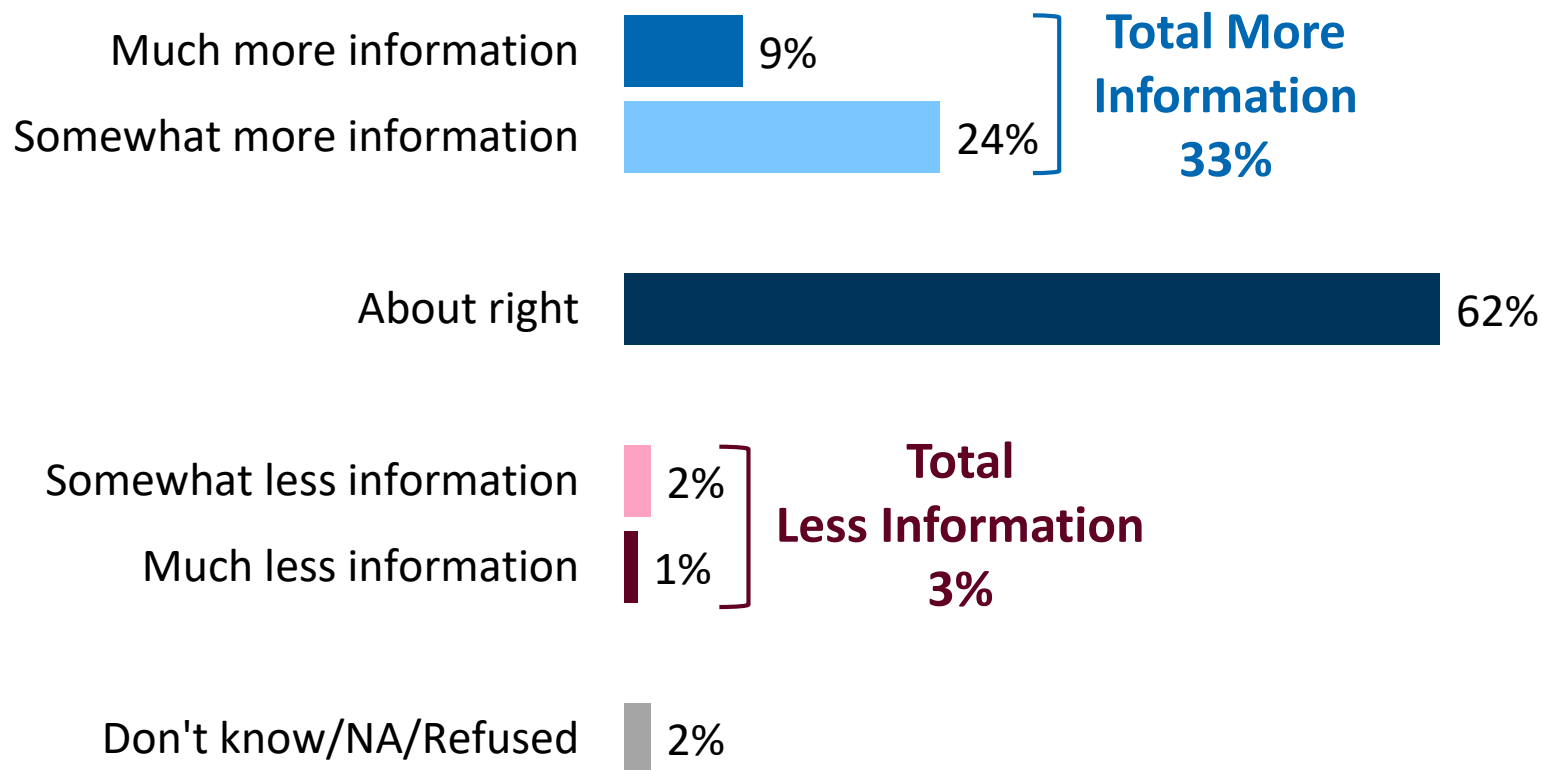


# Communications and Messengers



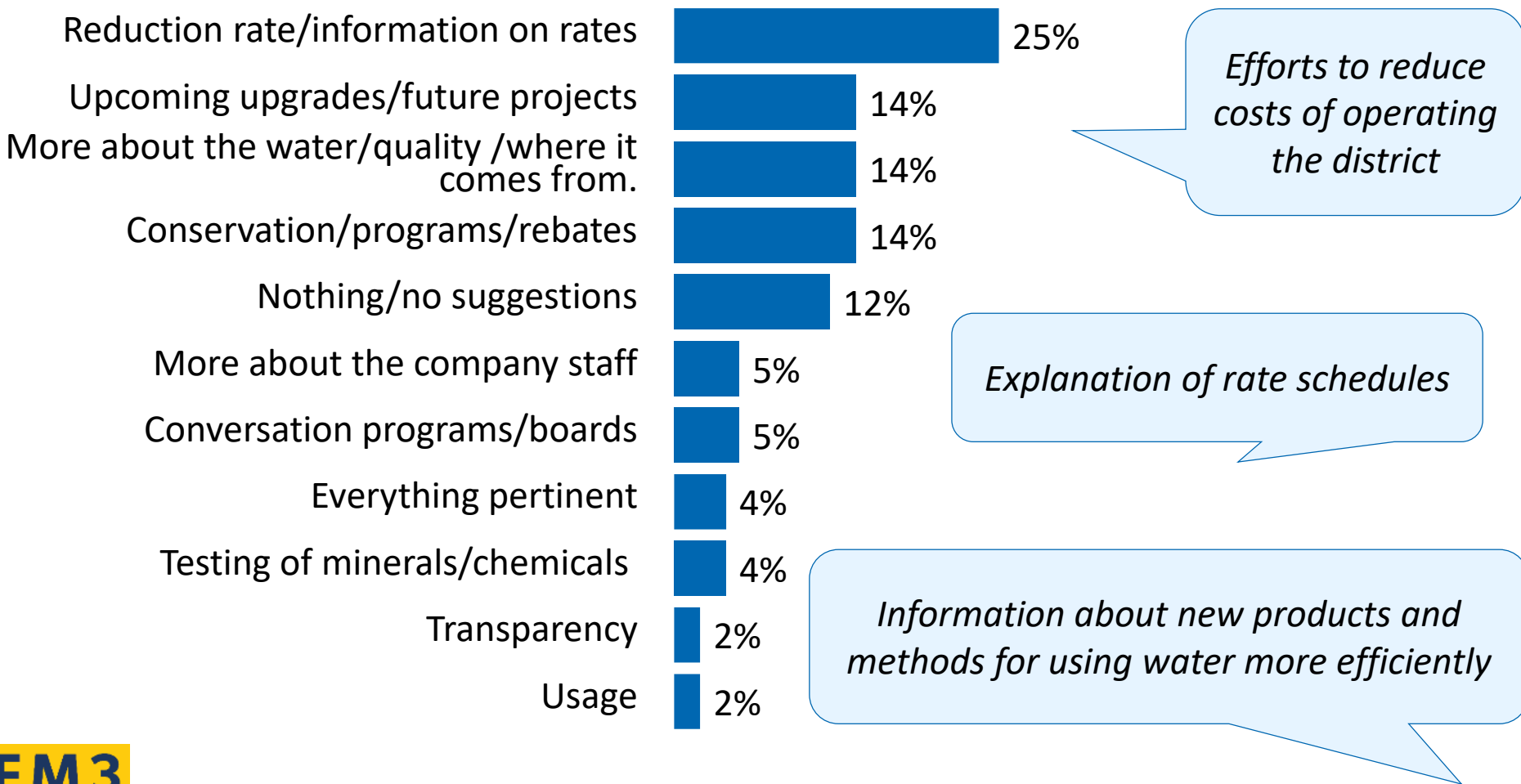
# Three in five say the amount information they receive from the District is “about right.”

*Overall, would you prefer to have more information about your water district, less information, or is the amount you receive about right?*



# Customers most want to hear about rate changes, upgrades, and water quality.

What types of information would you like to receive more of from your water district?  
(Open-ended; Grouped Responses Shown 2% and Above)

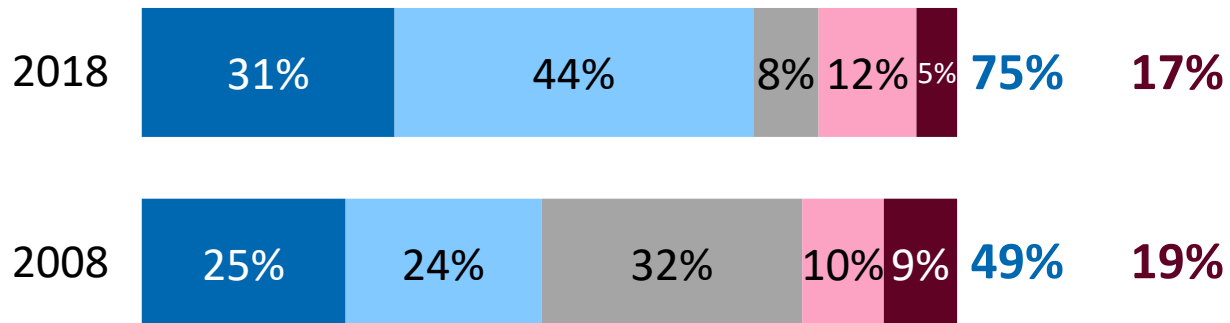


# There has been a marked improvement in communications regarding improvements.

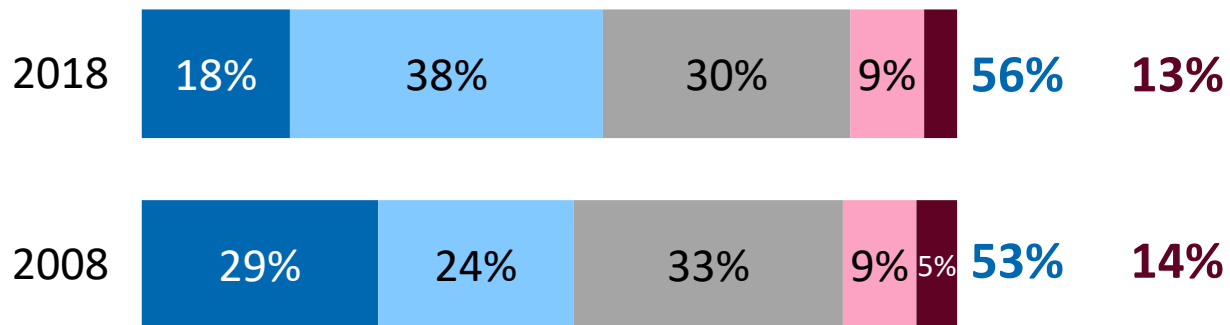
■ Strng. Agree ■ Smwt. Agree ■ Neutral/DK ■ Smwt. Disagree ■ Strng. Disagree

**Total Agree** **Total Disagree**

San Juan Water District keeps us well-informed about capital improvement projects, including improvements to the water treatment plan, pipelines and other portions of the water system, and how these improvements benefit customers.

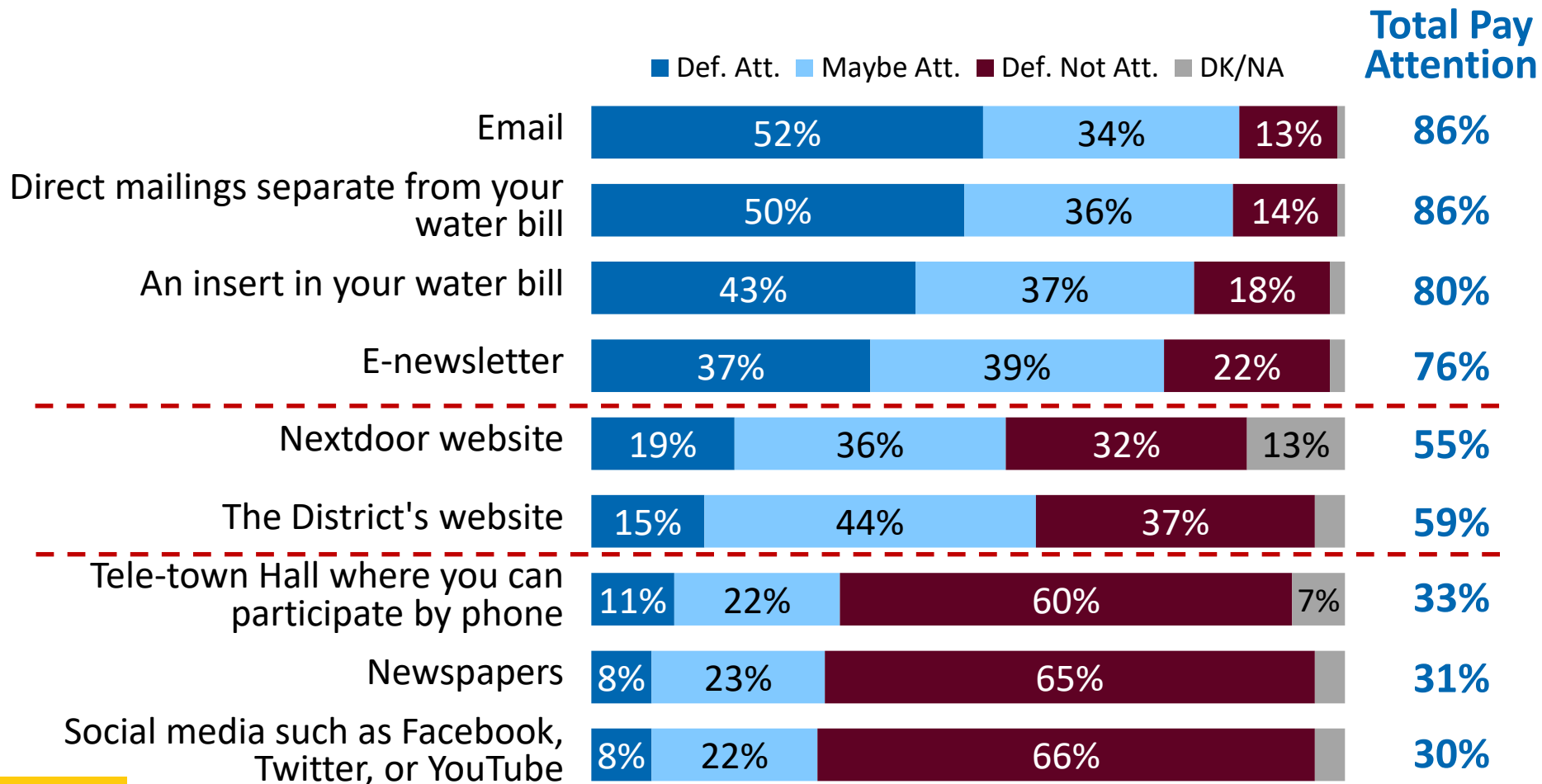


Capital improvement projects in San Juan Water District personally benefit me and my family.



# Customers prefer emails, direct mail, and inserts in their bill as modes of communication.

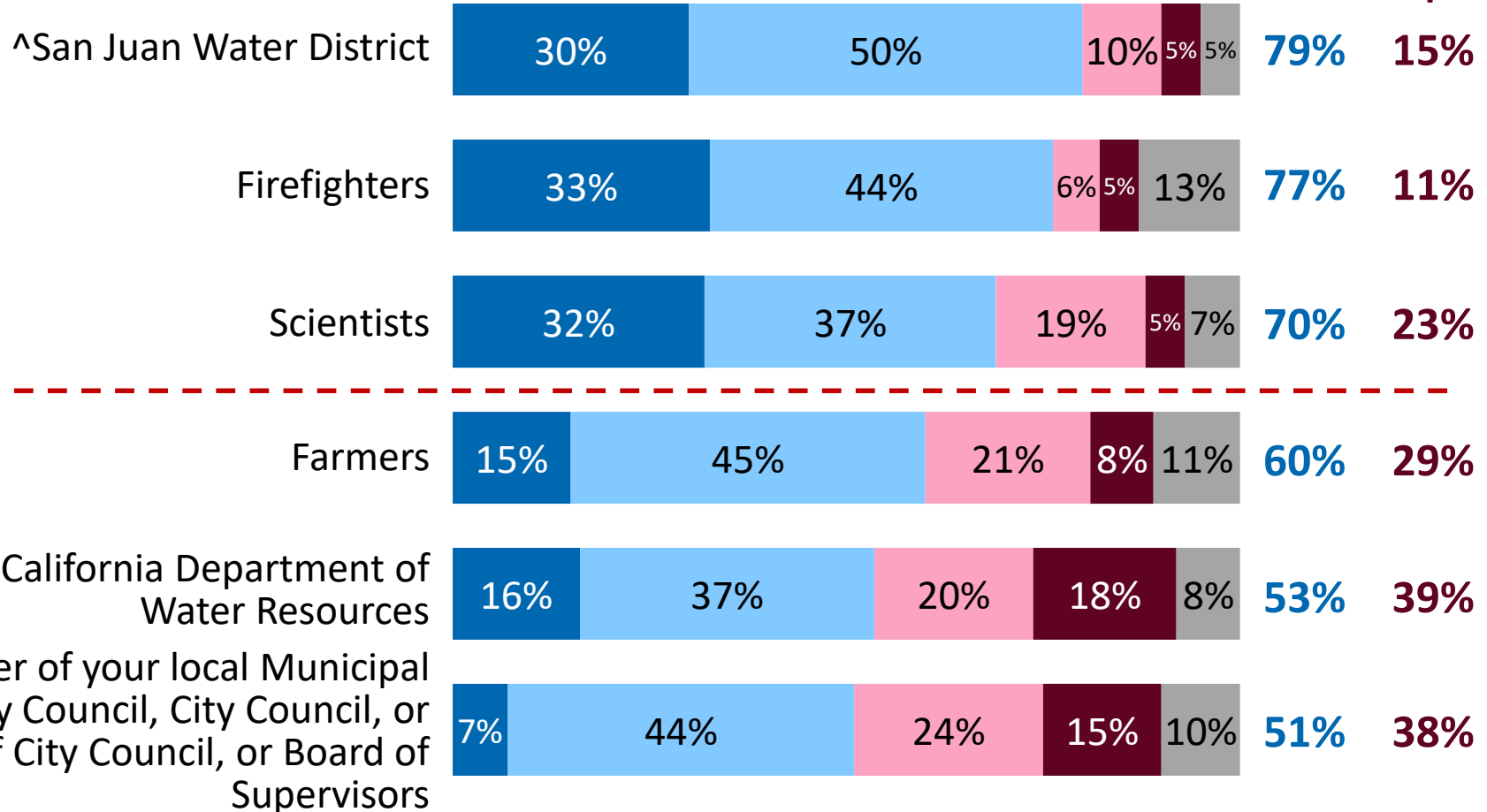
*I am going to read you a list of ways the San Juan Water District may communicate with you. Please tell me whether you would definitely pay attention, maybe pay attention, or definitely not pay attention to information from the Water District if it were presented to you in that way.*



# Customers trust the District, firefighters and scientists, the most on water issues.

■ Trust Great Deal ■ Trust Smwt. ■ Smwt. Suspt. ■ Very Suspt. ■ HDO/DK/No Opin.

**Total Trust** **Total Suspect**





# Majorities are skeptical of the Governor, the State Water Resources Control Board, and local members of the Legislature.

■ Trust Great Deal ■ Trust Smwrt. ■ Smwrt. Suspt. ■ Very Suspt. ■ HDO/DK/No Opin.

**Total Trust** **Total Suspect**

A professor of water science at a UC college



**50%** **35%**

California small business owners



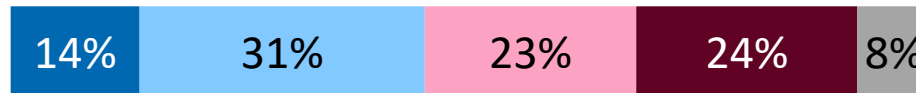
**50%** **33%**

The California Farm Bureau



**45%** **32%**

Environmental organizations



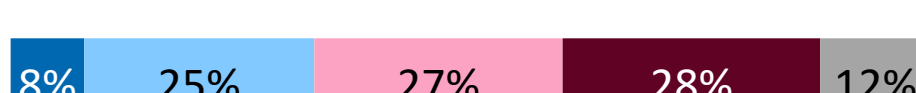
**44%** **48%**

Governor Jerry Brown



**34%** **57%**

The State Water Resources Control Board



**34%** **55%**

Your local members of the State Legislature



**23%** **66%**



# Conclusions



# Conclusions

- ✓ Customers are widely familiar with the San Juan Water District and view it favorably.
- ✓ The broad satisfaction with the District cuts across major demographic groups; customers point to the reliable water and customer services as sources of satisfaction.
- ✓ Those who are dissatisfied cite concerns about rates and administrative costs.
- ✓ Safe drinking water, minimal service disruptions, and customer service rank highest in terms of customers' priorities. These same priorities are also ones with which customers are highly satisfied.
- ✓ A majority of customers is satisfied with the communications from the District.
- ✓ Ultimately, the survey results suggest a strong positive perception in the community, with room for growth in communicating rate changes, and their justification, to the public.

# For more information, contact:



OPINION  
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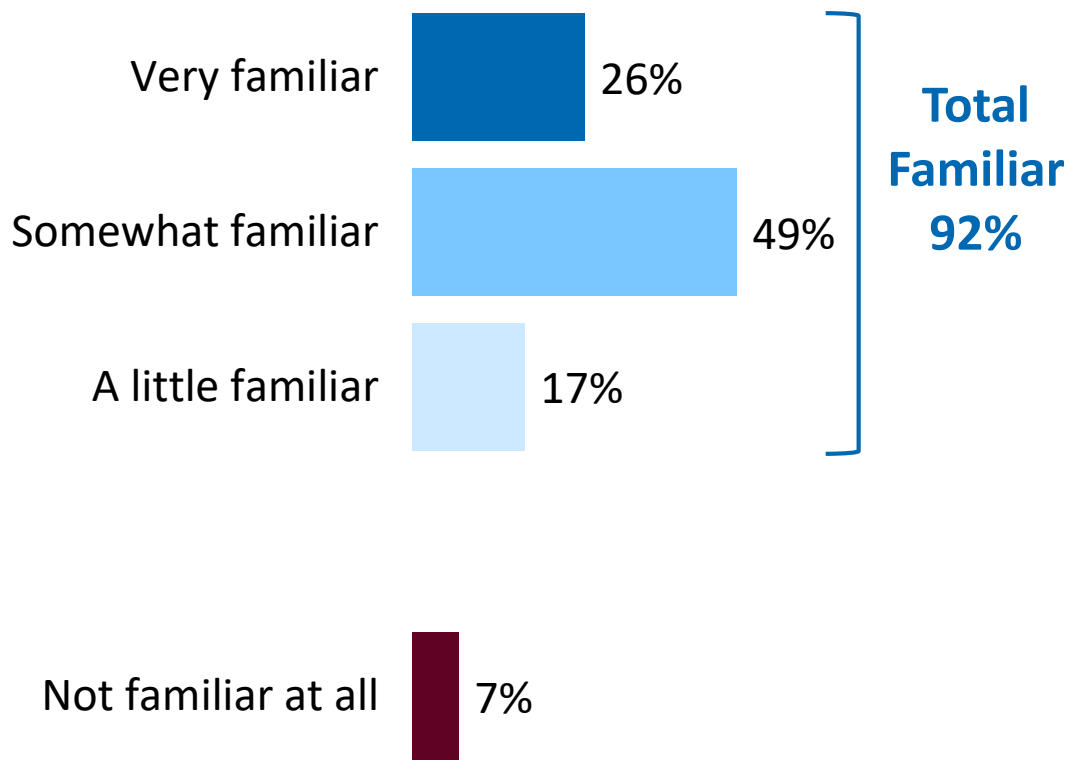


# Appendix



# Nine in ten customers are familiar with the District, but few are “very” familiar.

*How familiar are you with the San Juan Water District and its work in your area?*

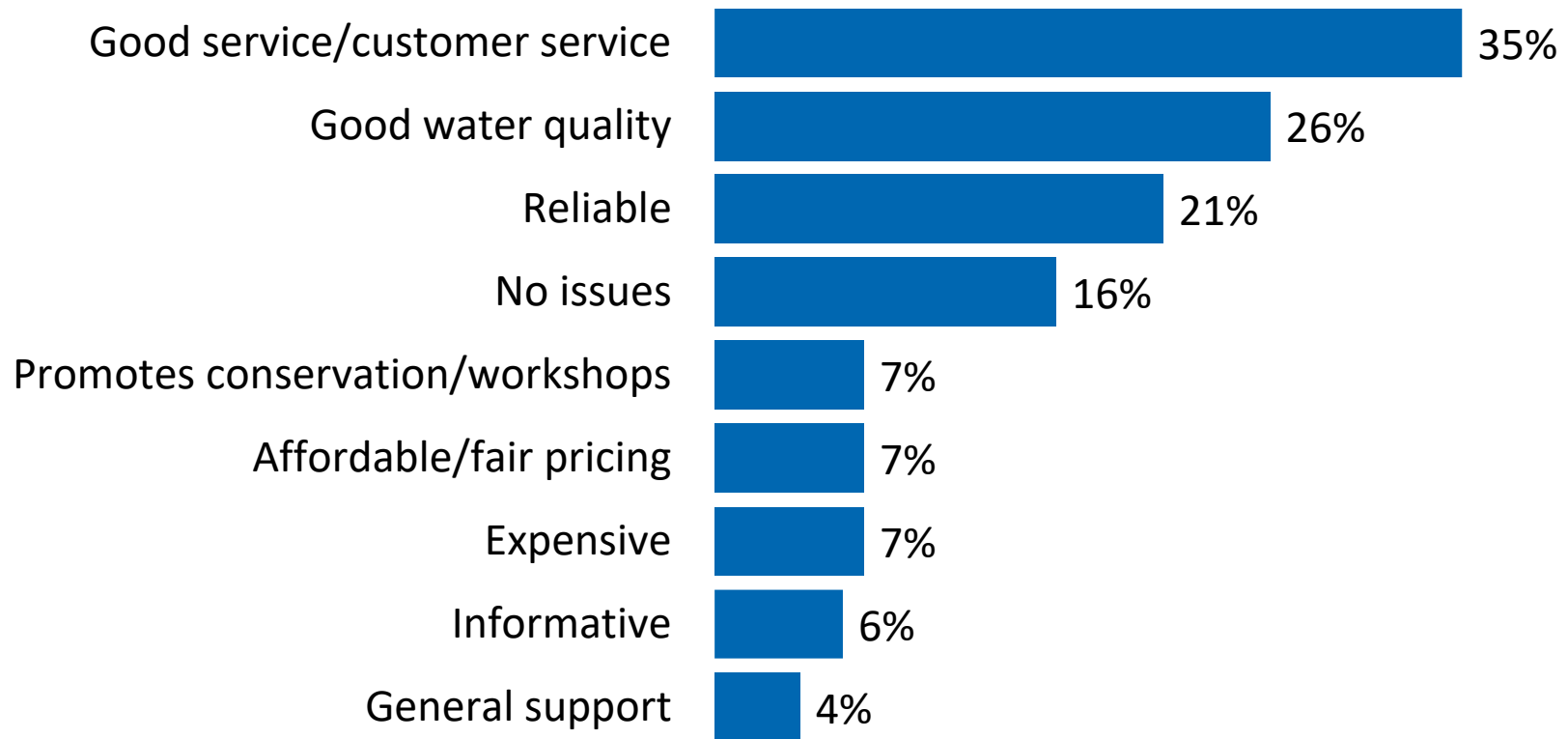


Demographic Groups	Very Familiar	% of Sample
All Customers	26%	100%
Ages 75+	38%	17%
Ages 40-49	33%	11%
Ages 65+	31%	43%
All People of Color	31%	9%



# Those who are satisfied point to the District's good service and water quality.

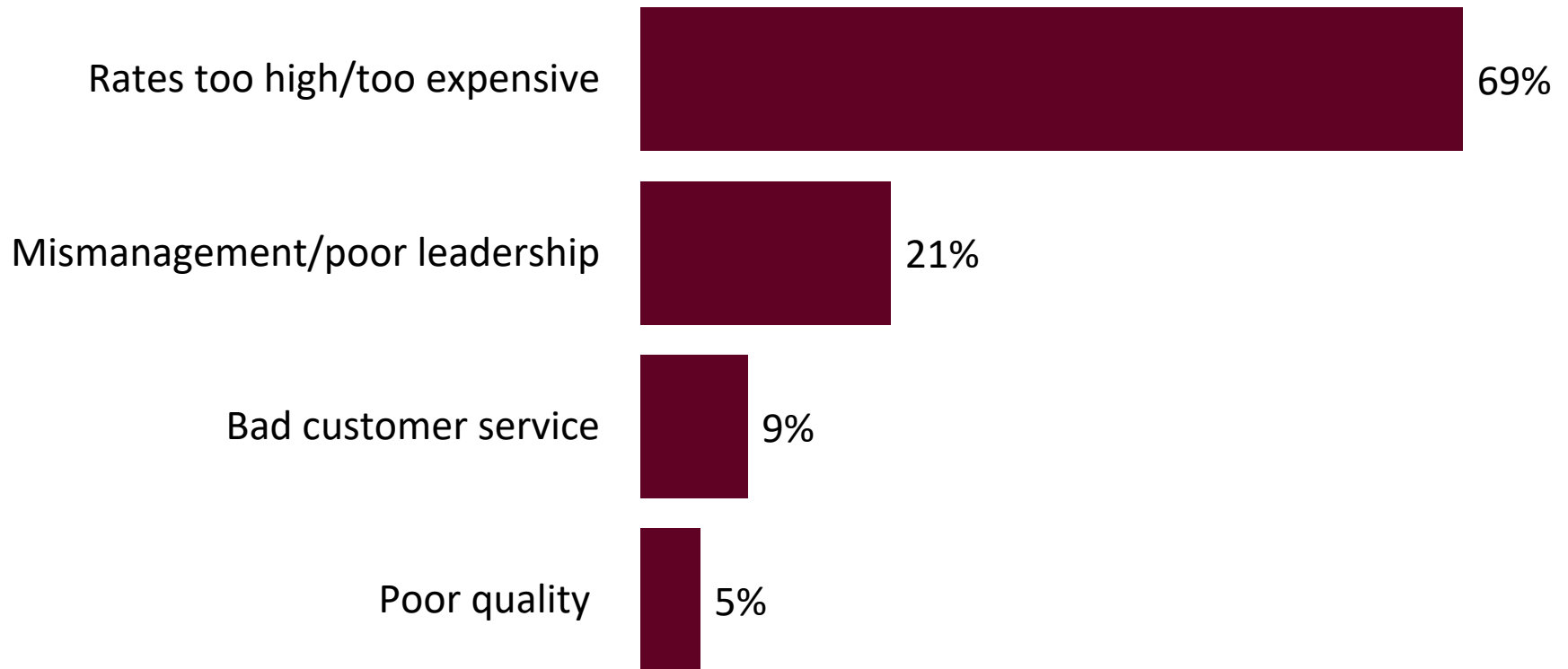
*In a few words of your own, why are you **SATISFIED** with the District's services?  
(Open-ended; Grouped Responses Shown)*





# The few who are dissatisfied are mostly concerned about rates.

*In a few words of your own, why are you **DISSATISFIED** with the District's services?  
(Open-ended; Grouped Responses Shown)*

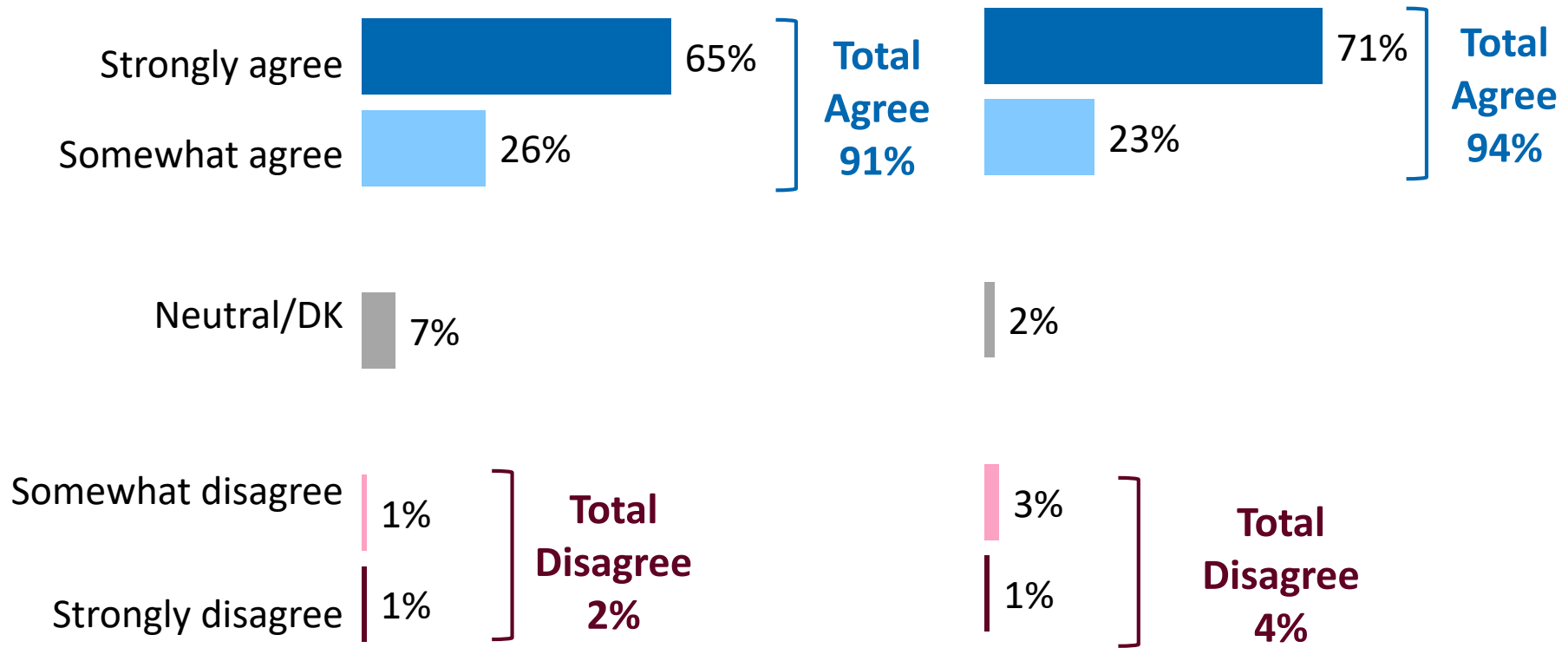


# Customers consistently feel that the District does a good job providing a reliable water supply.

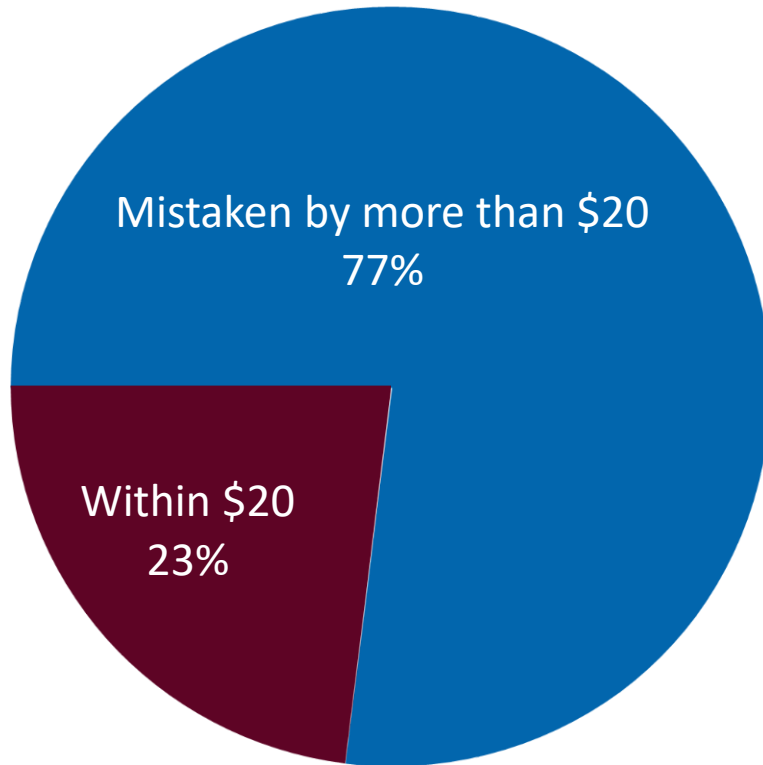
*San Juan Water District does a good job of providing a reliable water supply.*

2008

June 2018



# Less than one quarter of respondents were able to guess their actual average bill within \$20.



Average amount difference between the estimated amount and actual average bill:

\$72.39

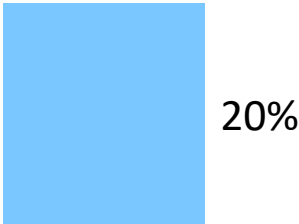
# Customers are more likely to prioritize efficient water use over conservation.

*I am going to read you a pair of statements about how water supplies in your area might be managed. Please choose the statement that comes closest to your opinion.*

The highest priority should be to require people to use water efficiently, ensuring that they get the most out of their water use without wasting any



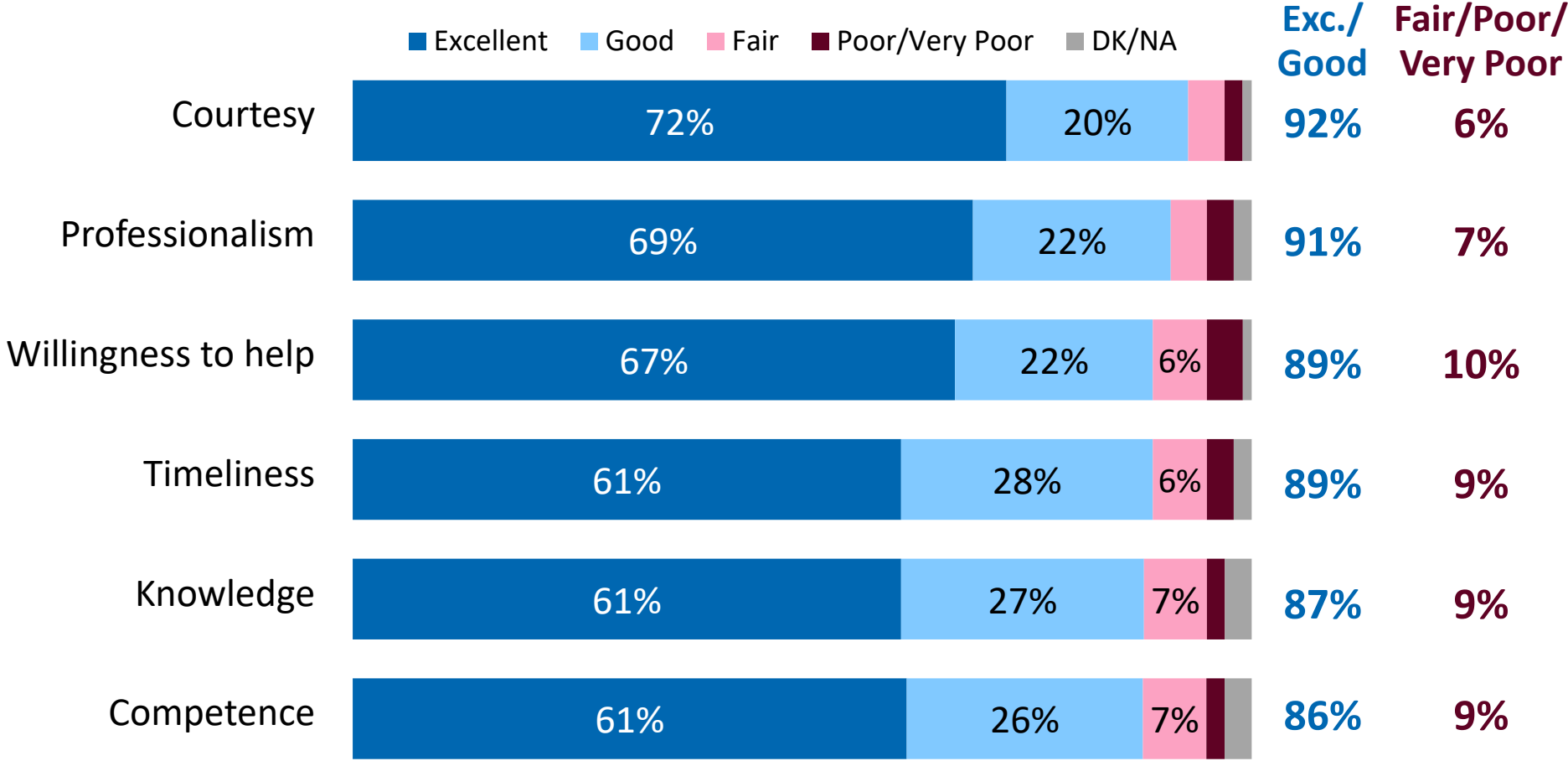
The highest priority should be to require people to conserve water, reducing their water use as much as possible



Demographic Groups	Efficient Use	Conserve Water
<b>City</b>		
Folsom	39%	16%
Granite Bay	41%	19%
Orangevale	51%	19%
Other	46%	25%
<b>Billing Amount</b>		
Up to \$133	42%	21%
\$134-\$169	48%	15%
\$170-\$234	36%	22%
\$235	42%	21%

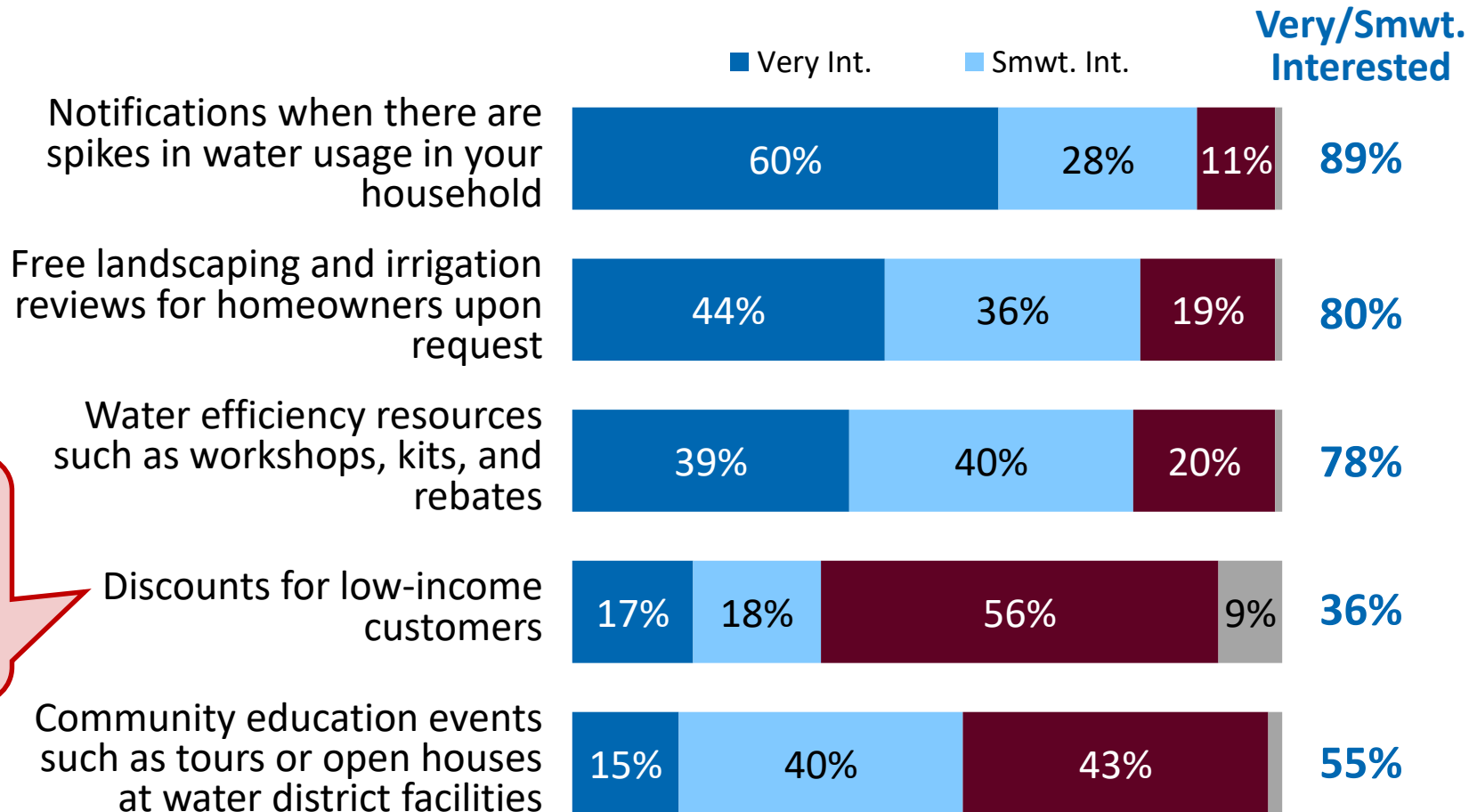
# Customers offer a very positive rating on a number of aspects of customer service.

Please tell me how you rate the following aspects of the service provided by the customer service you have dealt with. Would you rate their \_\_\_\_\_ as excellent, good, fair, poor, or very poor?



# Nearly nine in ten are interested in notifications about spikes in water usage.

*I am going to mention some different types of information on services your water district may provide you. Please tell me whether you are very interested, somewhat interested, or not interested in receiving information on this service.*



42% of lower-income customers are "very interested"

# Customers tended to prefer being contacted directly rather than via social media.

*How would you prefer the San Juan Water District contact you in the case of an emergency that requires you to take immediate action?  
(Multiple responses accepted)*

