



# 2024 Customer Satisfaction Study



**Report of Findings**

20 June 2024  
Confidential & Proprietary

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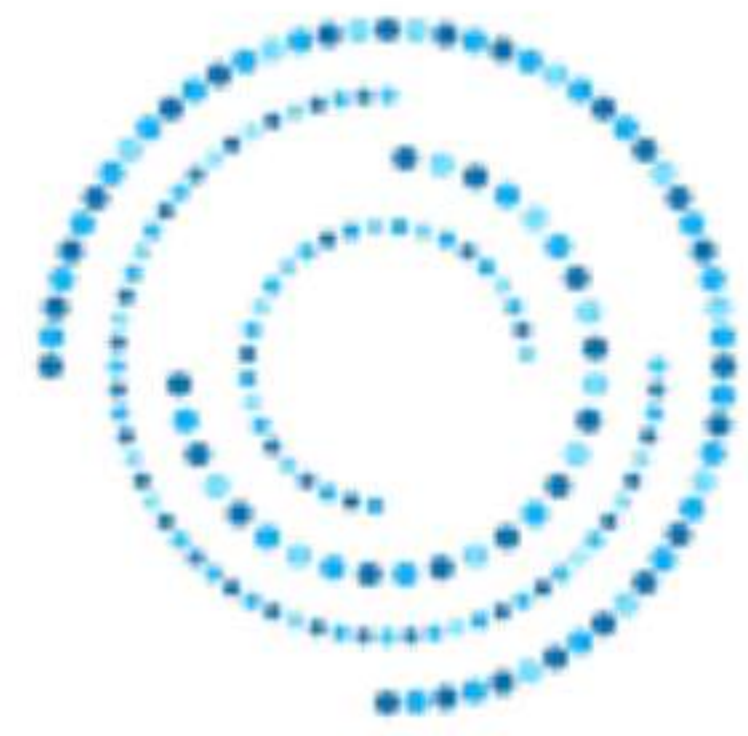
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# Harnessing the Power of Data

...to help clients achieve organizational goals.

 **Data** supporting strategic decisions to improve products and services. Since 1979, our experience with study and instrument design, data collection, analysis, and formal presentation assists our clients in identifying the “why” and “what’s next.”

 **Talent** with a knowledge base in a wide range of industries and methodologies ensures a 360° view of the challenges faced and the expertise to address them.

 **Solutions** that are customized to provide a personalized approach to understanding organizational, employee, and customer needs, allowing for more informed decisions.

## Methodologies:



## Studies:



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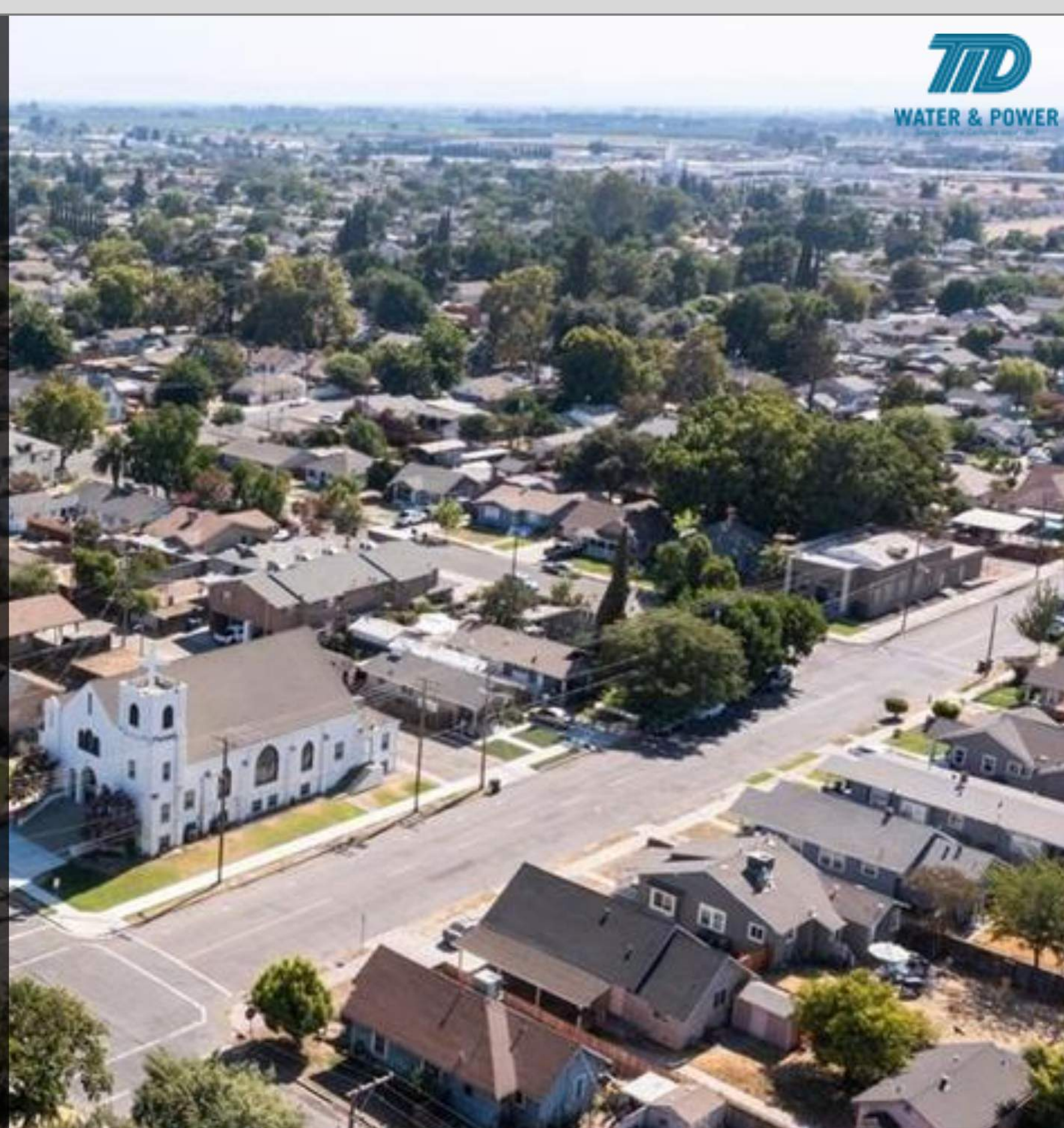
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# Project Overview

## Research Objectives

- GreatBlue was commissioned by the Turlock Irrigation District (hereinafter, “TID”) to conduct comprehensive research among its residential and commercial customers to gain a deeper understanding of perceptions of the utility, its service, resources, and rates.
- The primary goals of this research study were to assess the effectiveness of TID’s ability to serve its customers, identify areas for improvement, and gauge perceptions in planning for the future of the utility.
- The outcome of this research will enable TID personnel to a) more clearly understand, and ultimately set, customer expectations, b) act on near-term opportunities for improvement and, c) create a strategic roadmap to increase comprehensive customer satisfaction.



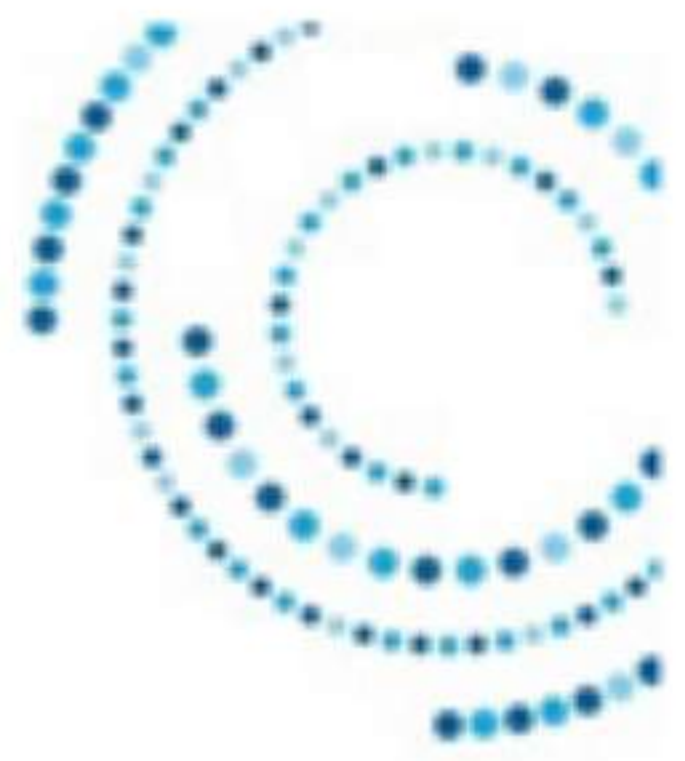
## Areas of Investigation

The TID Customer Satisfaction Study leveraged a digital research methodology to address the following areas of investigation:

- Rating the organizational characteristics of TID
- Satisfaction with customer service and field personnel
- Expectations of TID
- Awareness of TID's ownership model
- Satisfaction with outage restoration and communication
- Reliability of TID’s electric service
- Interest in energy efficiency products and services
- Likelihood of purchasing an electric vehicle in the future
- Perception of TID's electric rates
- Preferred methods of communication
- Demographic profile of residents
- Firmographic profile of commercial customers



# Research Methodology Snapshot

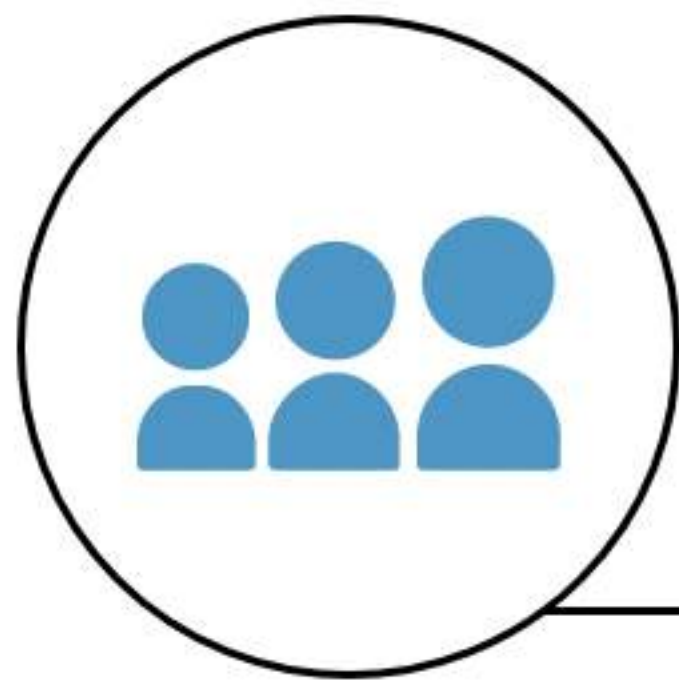


## Residential

Methodology <b>Digital</b>	No. of Completes <b>445</b>	No. of Questions <b>41*</b>	Incentive <b>None</b>	Sample <b>Customer List</b>
Target <b>Residential Customers</b>	Quality Assurance <b>Dual-level**</b>	Margin of Error <b>+/- 4.59%</b>	Confidence Level <b>95%</b>	Research Dates <b>April 2 - June 3, 2024</b>

\* This represents the total possible number of questions; not all respondents will answer all questions based on skip patterns and other instrument bias.

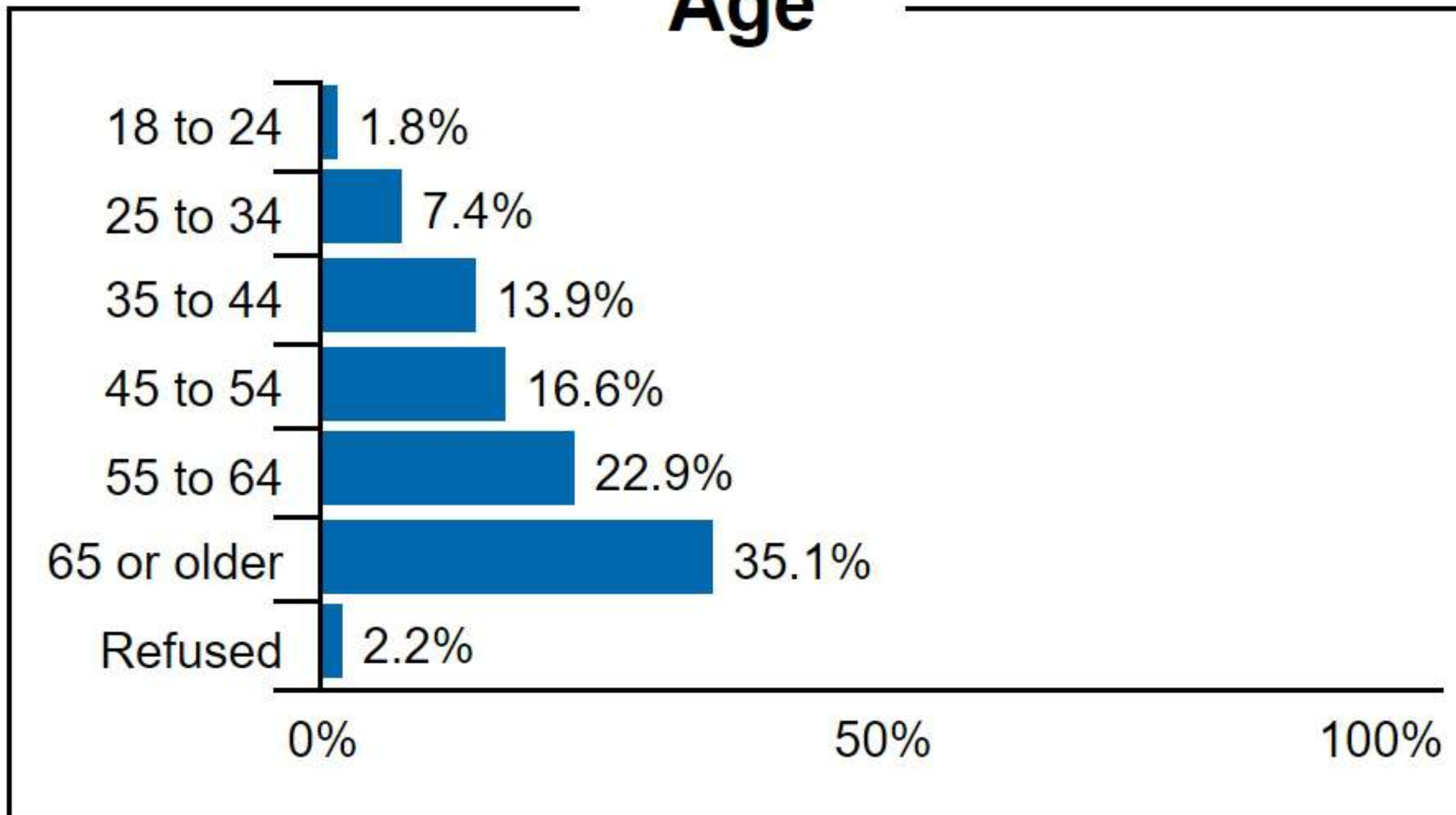
\*\* Data quality personnel, along with a computer-aided interviewing platform, ensure the integrity of the data is accurate.



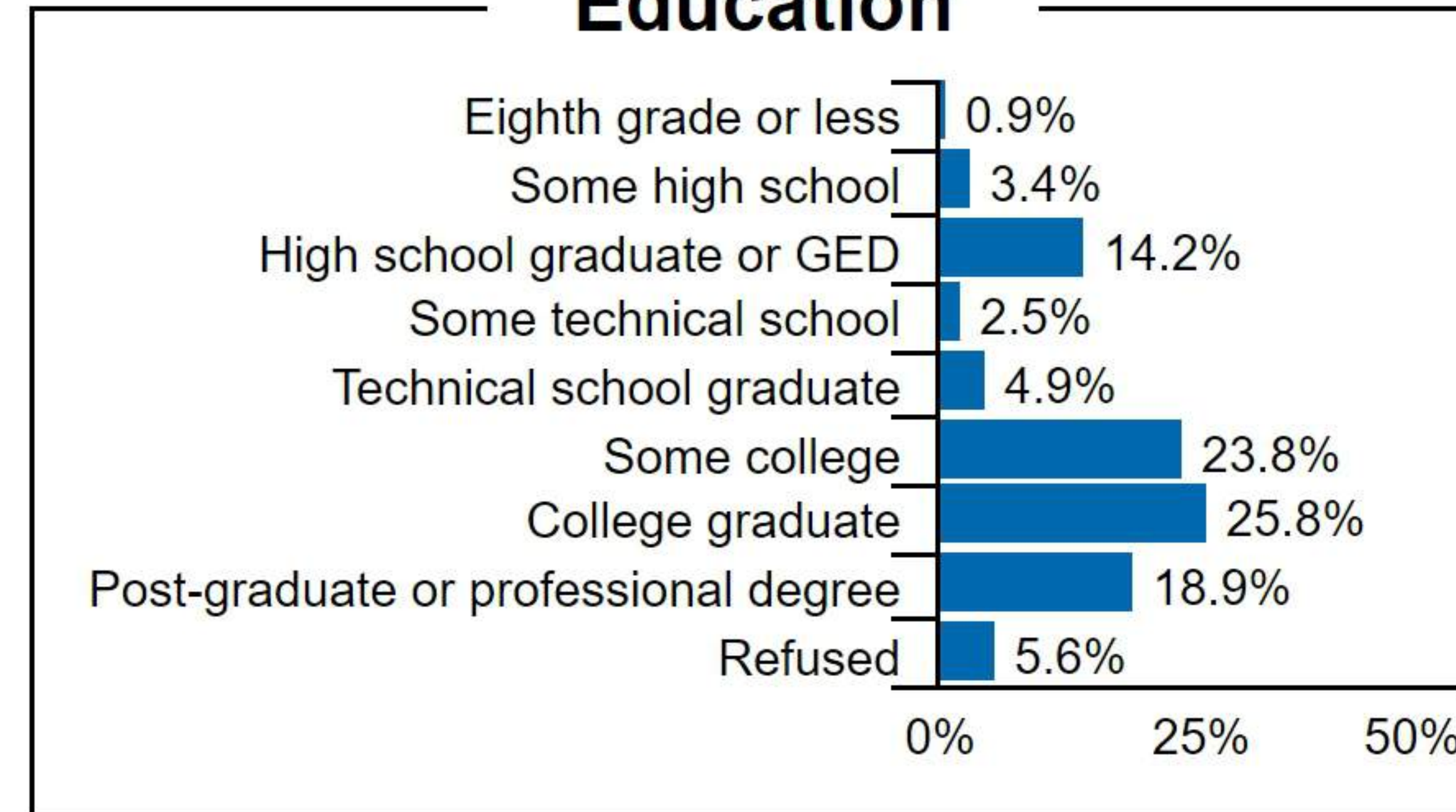
# Respondent Snapshot



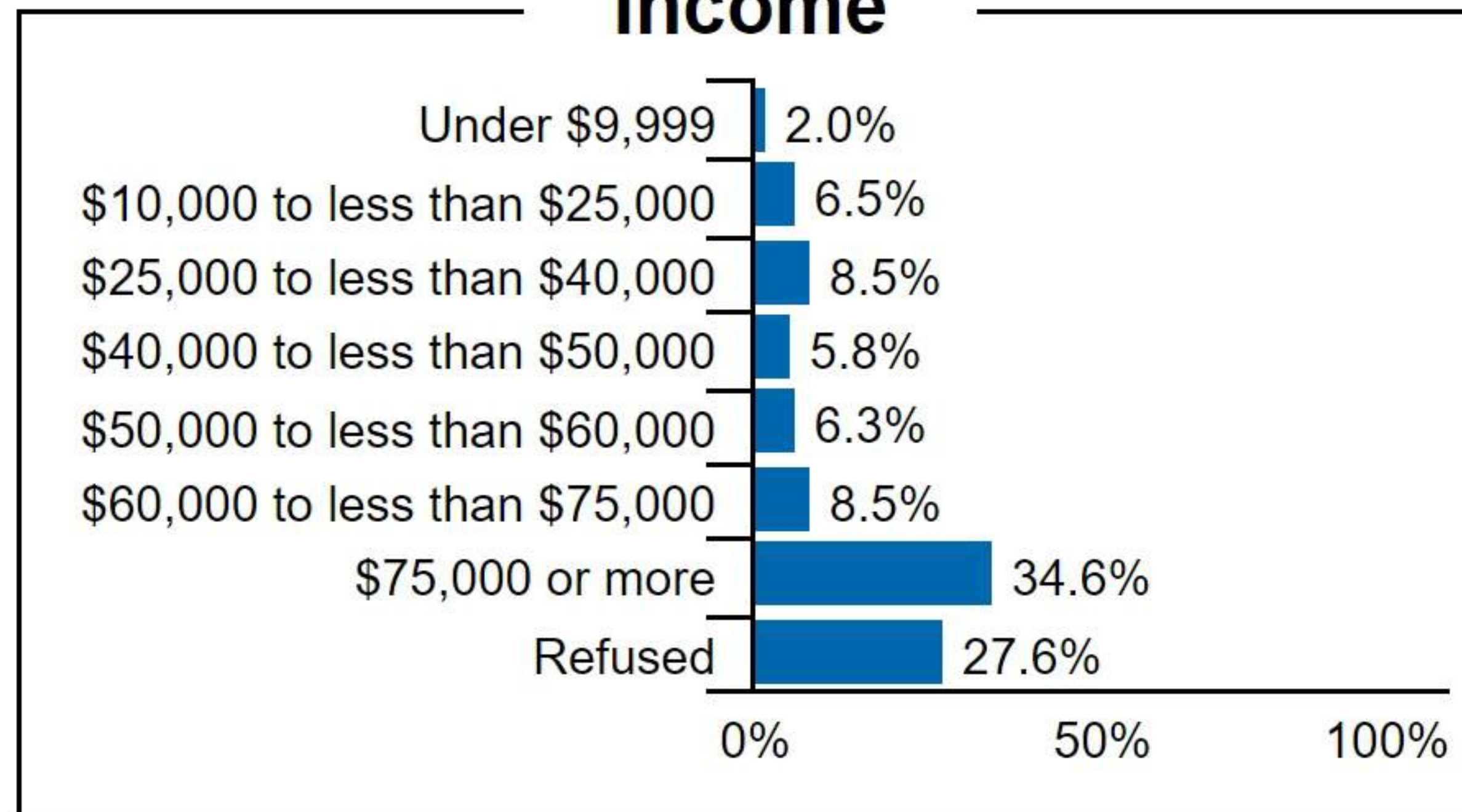
## Age



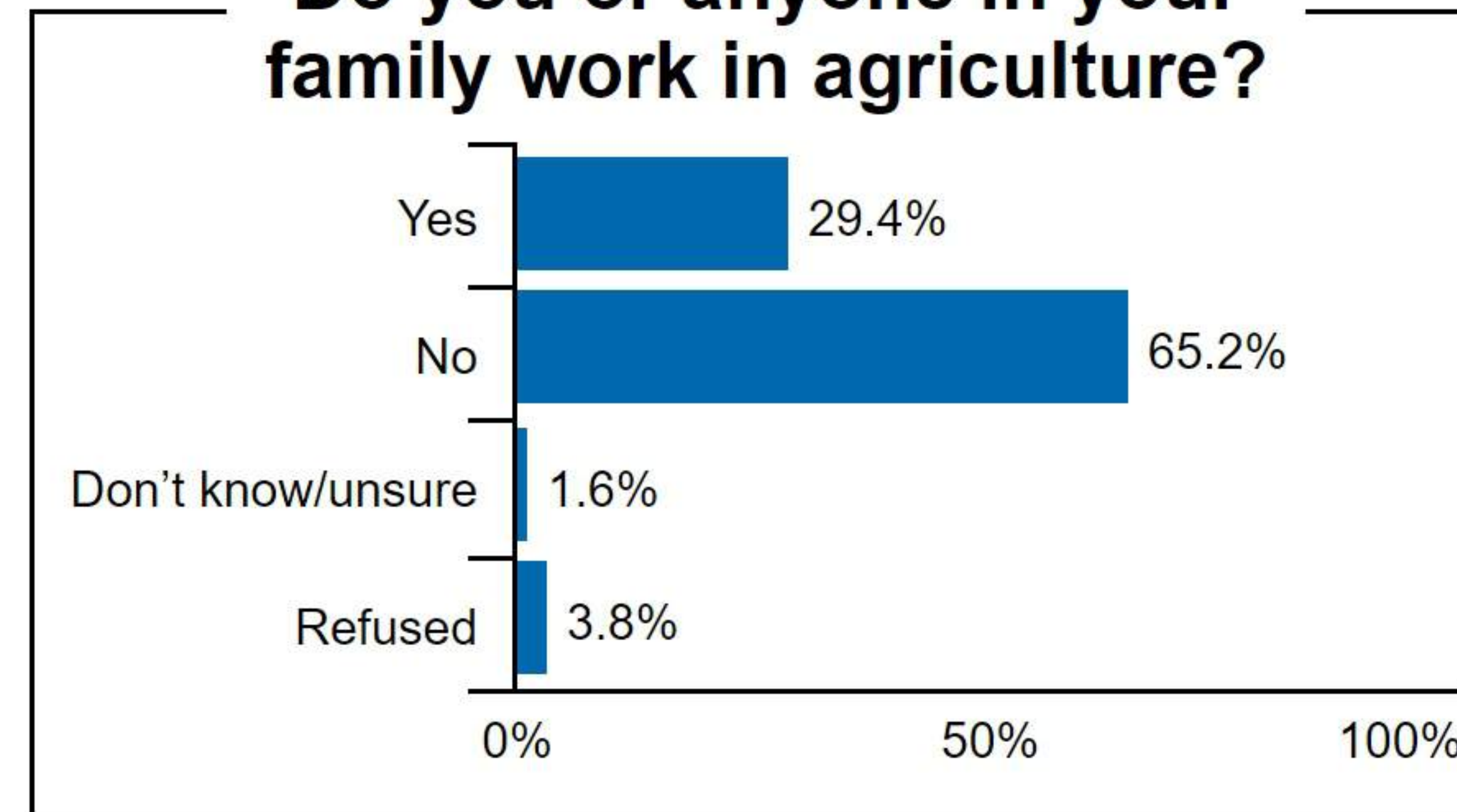
## Education

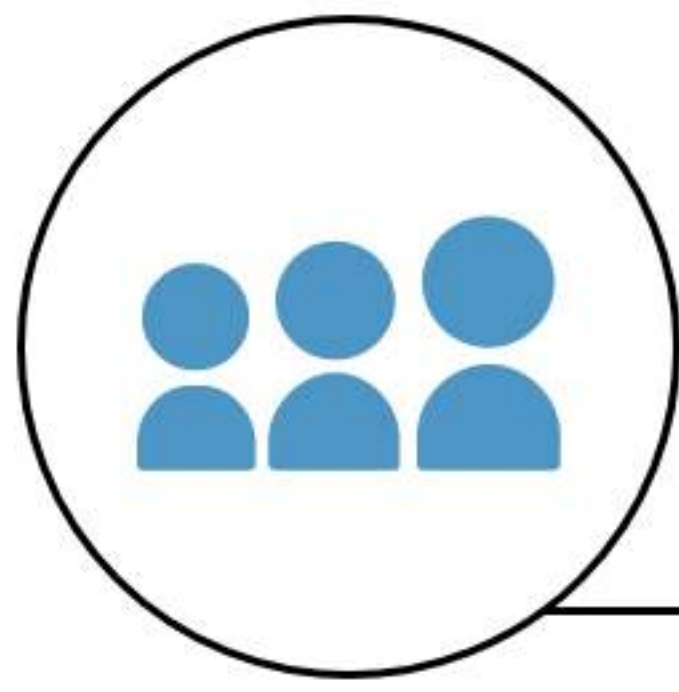


## Income



## Do you or anyone in your family work in agriculture?

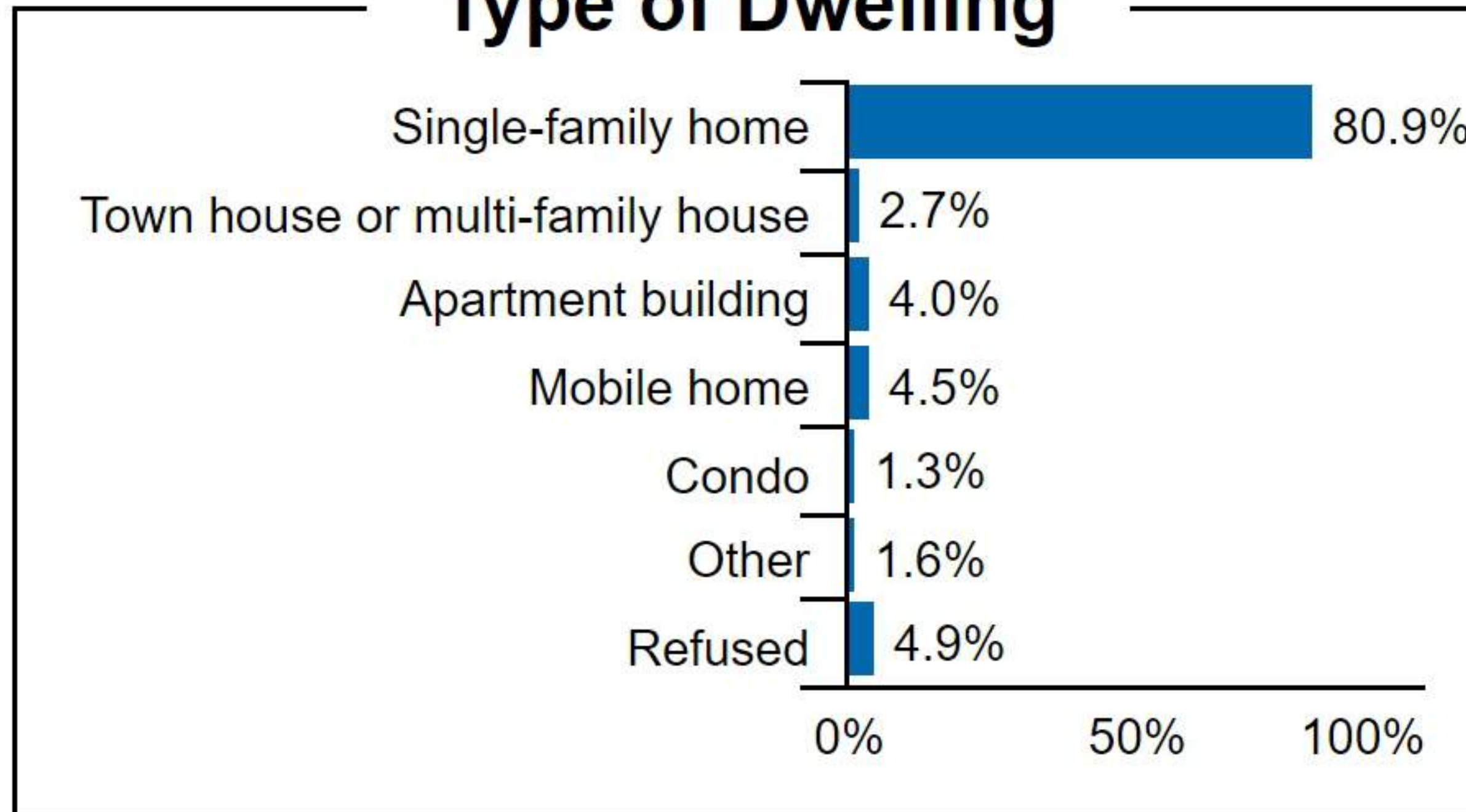




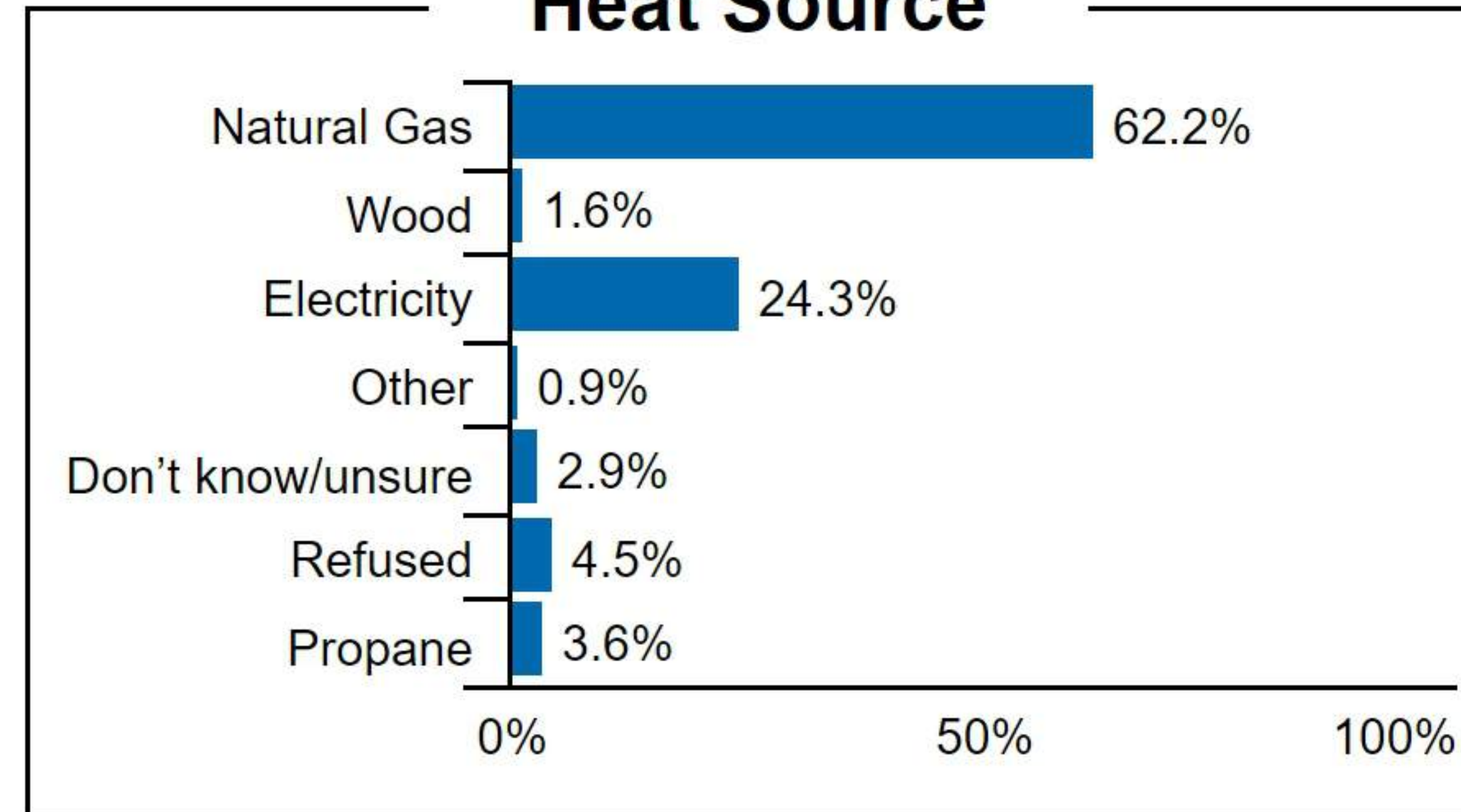
# Respondent Snapshot



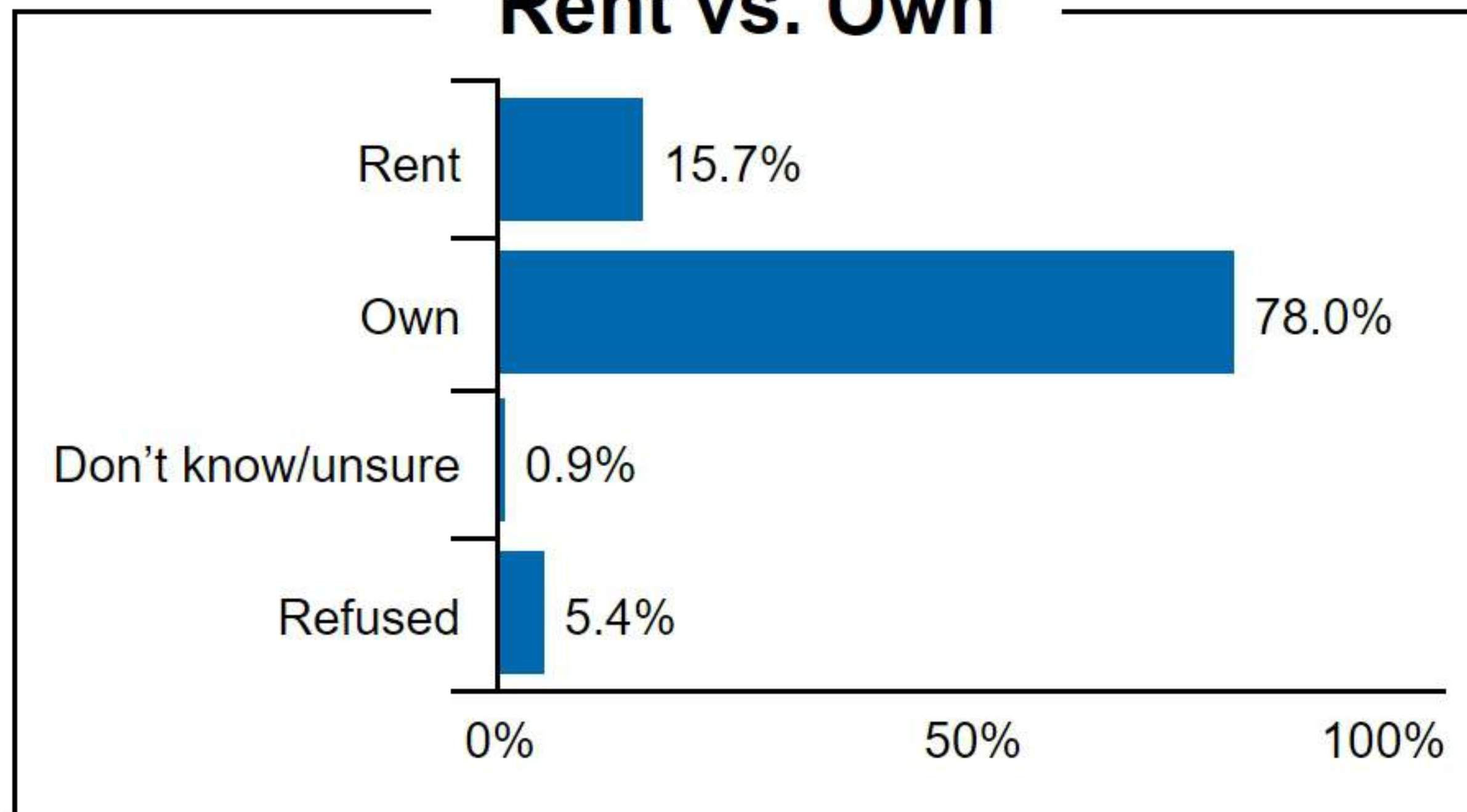
### Type of Dwelling



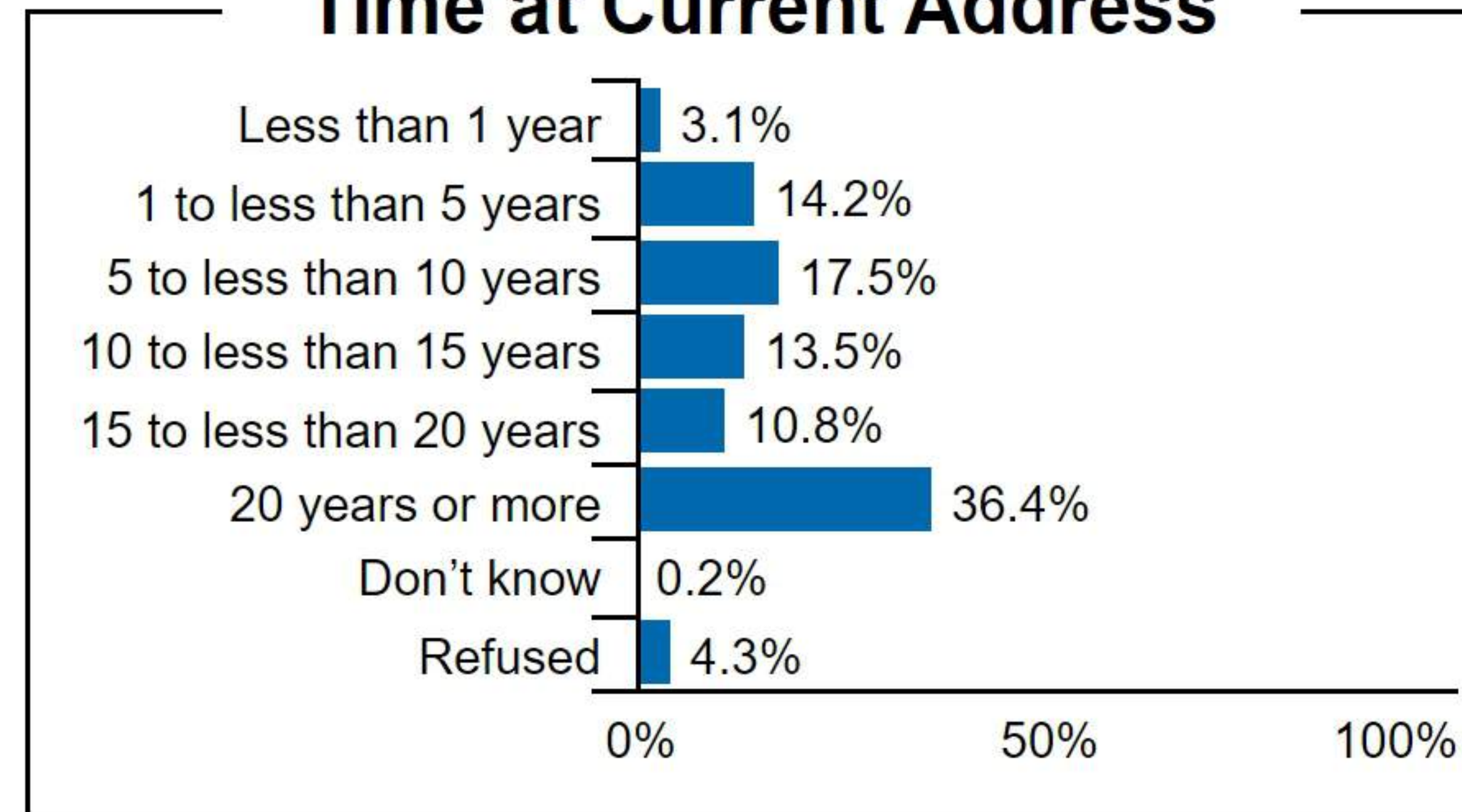
### Heat Source



### Rent vs. Own



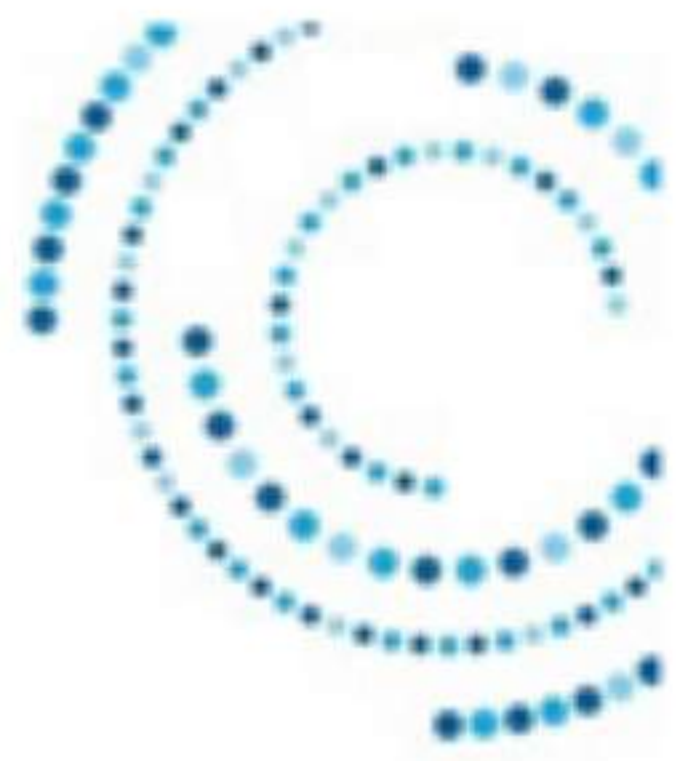
### Time at Current Address







# Research Methodology Snapshot

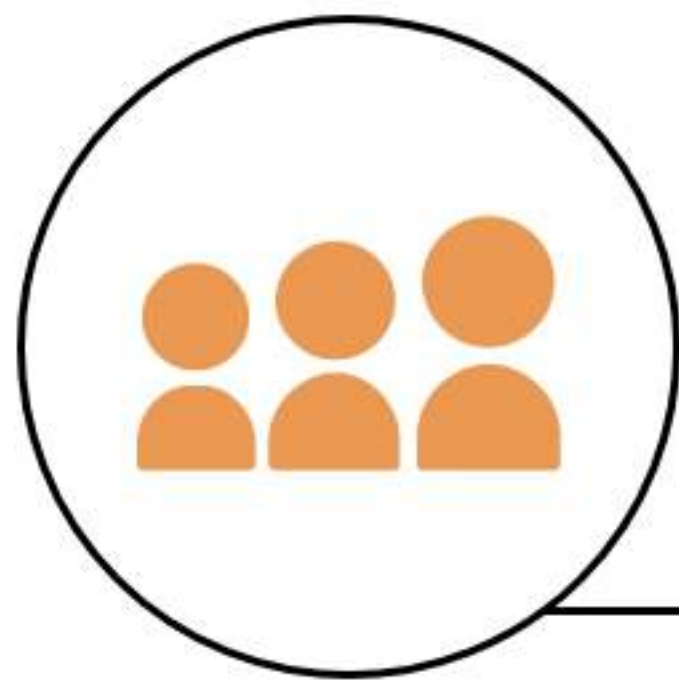


## Commercial

Methodology <b>Digital/Telephone</b>	No. of Completes <b>100</b>	No. of Questions <b>37*</b>	Incentive <b>None</b>	Sample <b>Customer List</b>
Target <b>Commercial Customers</b>	Quality Assurance <b>Dual-level**</b>	Margin of Error <b>+/- 9.78%</b>	Confidence Level <b>95%</b>	Research Dates <b>April 2 - June 7, 2024</b>

\* This represents the total possible number of questions; not all respondents will answer all questions based on skip patterns and other instrument bias.

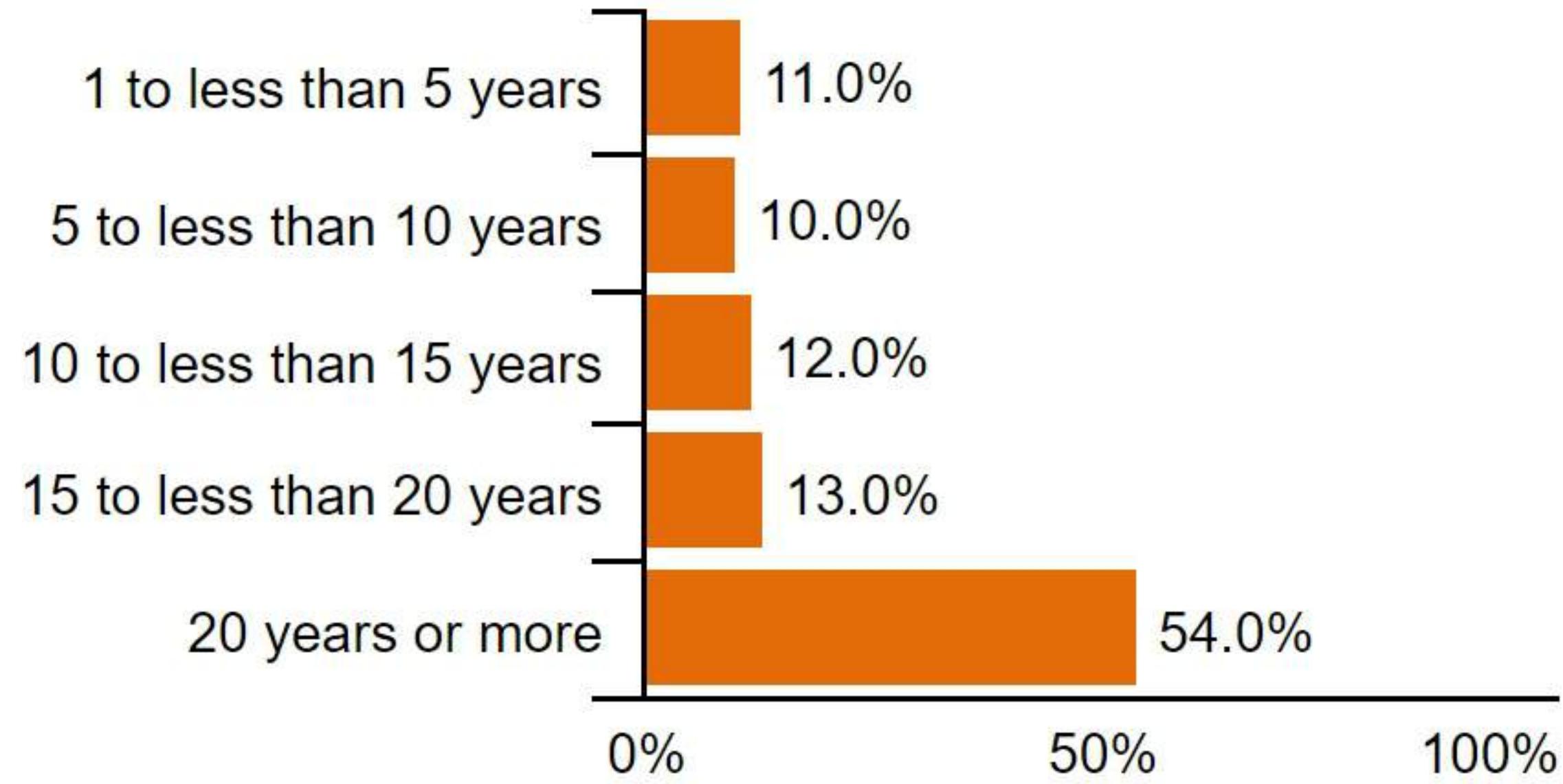
\*\* Data quality personnel, along with a computer aided interviewing platform, ensure the integrity of the data is accurate.



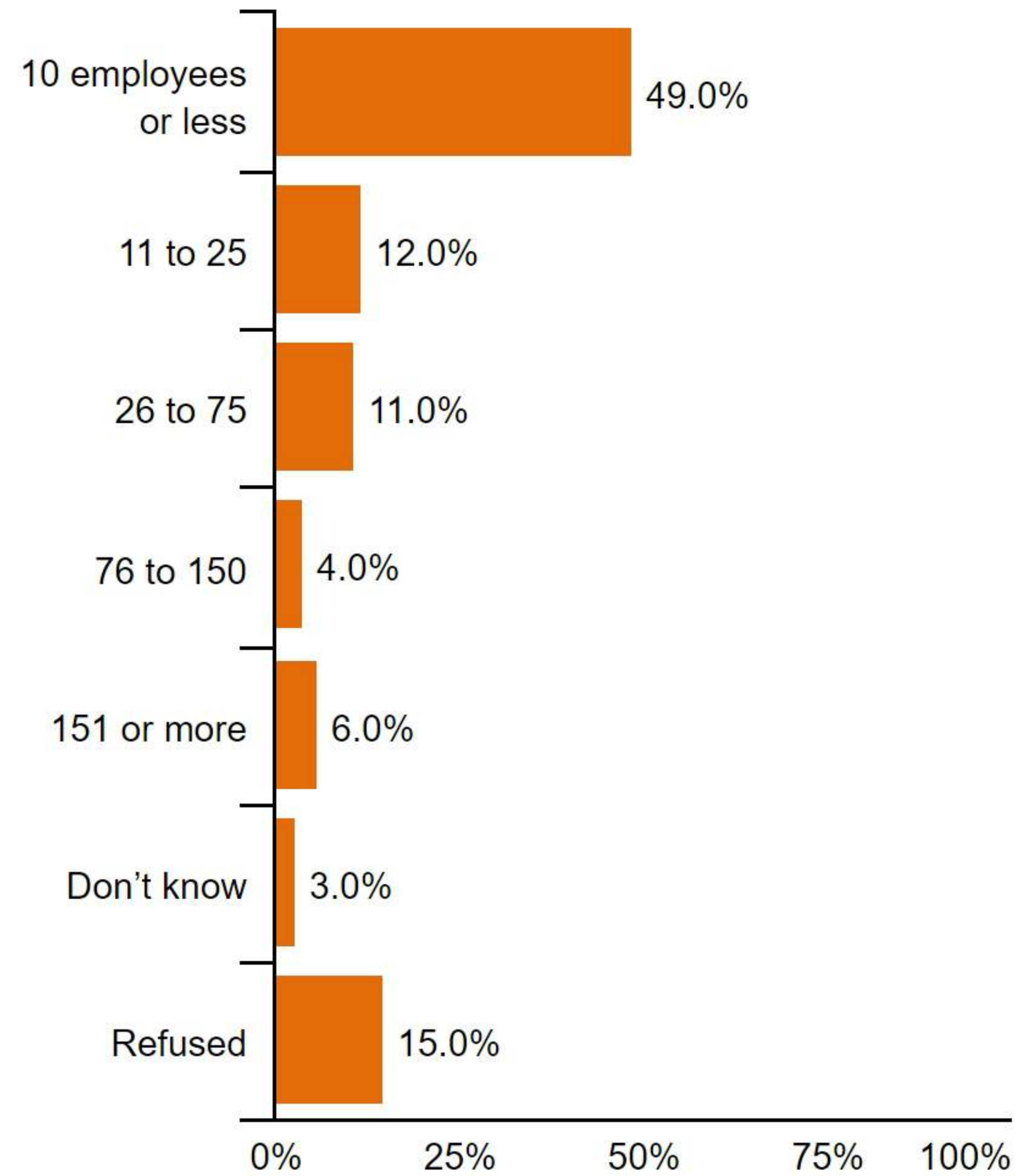
# Respondent Snapshot



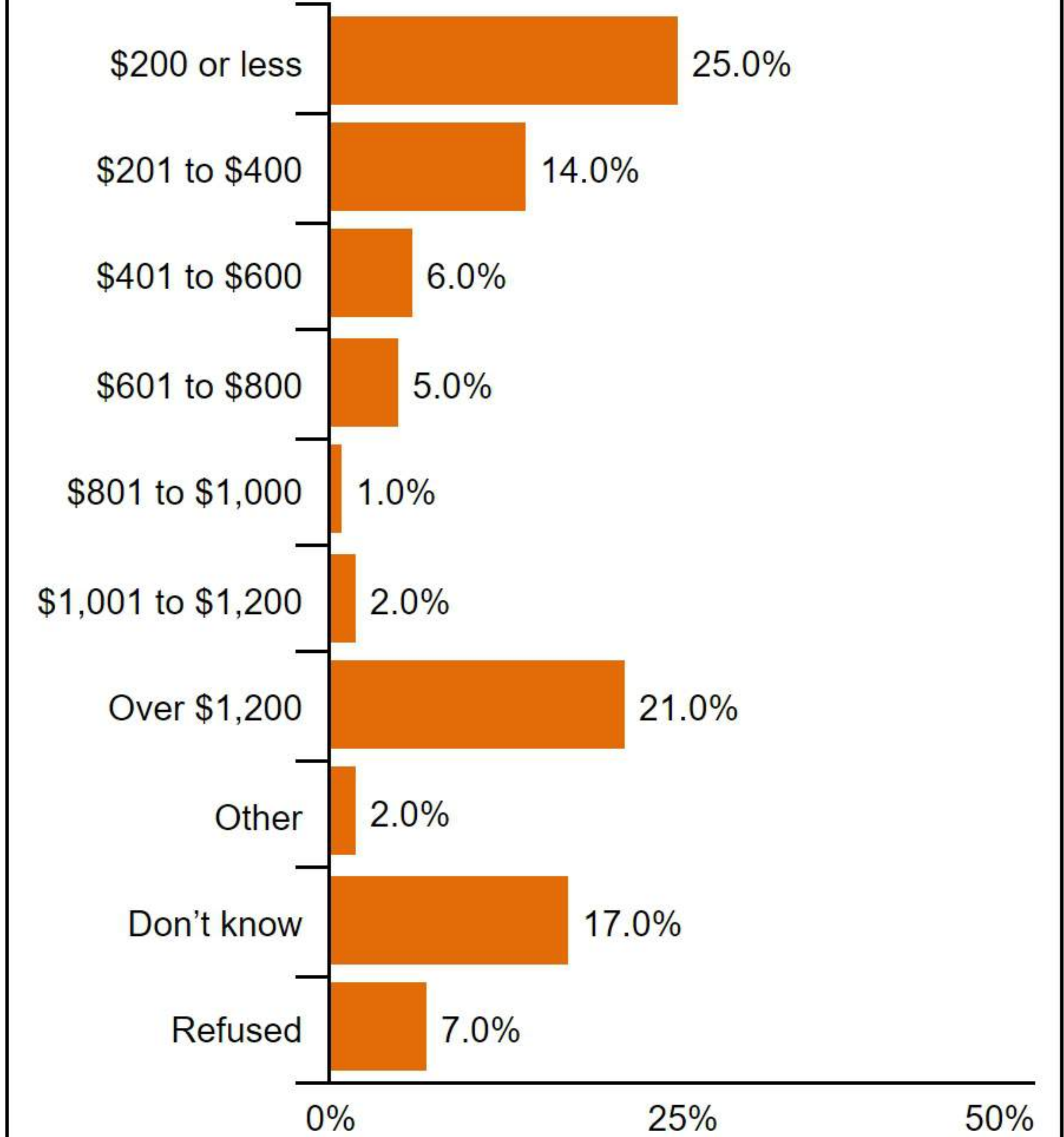
## Years as a Customer



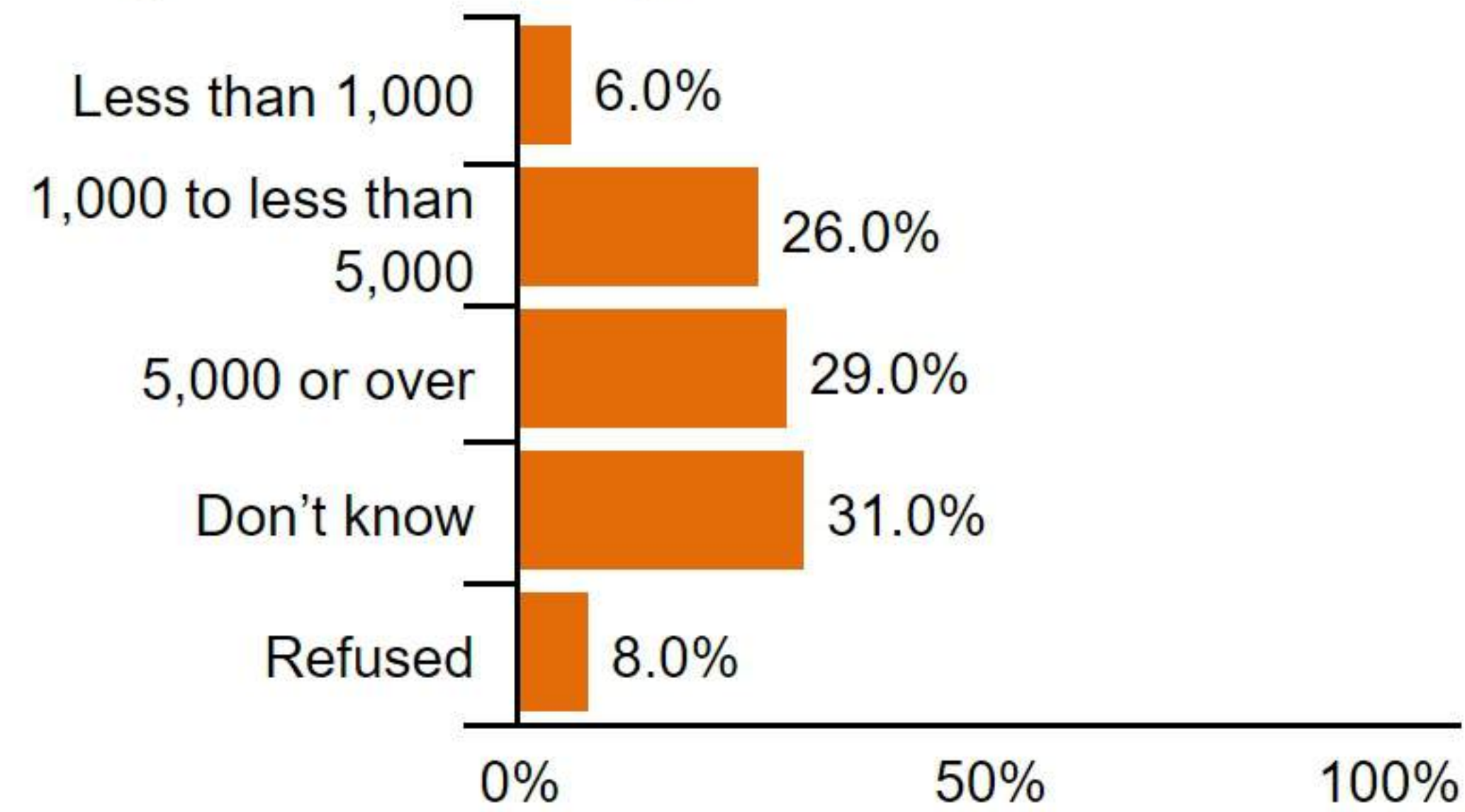
## Number of Employees



## Monthly Electric Bill



## Square Footage of Business



# Guide to Footnotes

## General

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*n=362*

*The lowercase "n" is used to indicate the base size, or the amount of respondents who answered a particular question.*

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*PPDS*

*GreatBlue's proprietary Public Power Data Source (PPDS) leverages data collected from 12,000 public power customers across the United States.*

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## Statistical Significance

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*(+/-)*

*(+/-) indicates statistical significance at a 95% confidence level, denoting whether it is higher or lower than the previous iteration of the survey. They are used in charts.*

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**36.2%**

**36.2%**

*Cell color indicates statistical significance at a 95% confidence level compared to the previous iteration of the survey. This is used in tables.*

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## Scale Questions

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*"Ratings 7-10 shown"*

*This phrase indicates positive ratings from questions that use a 10-point scale. The positive ratings are defined as a rating of 7 through 10.*

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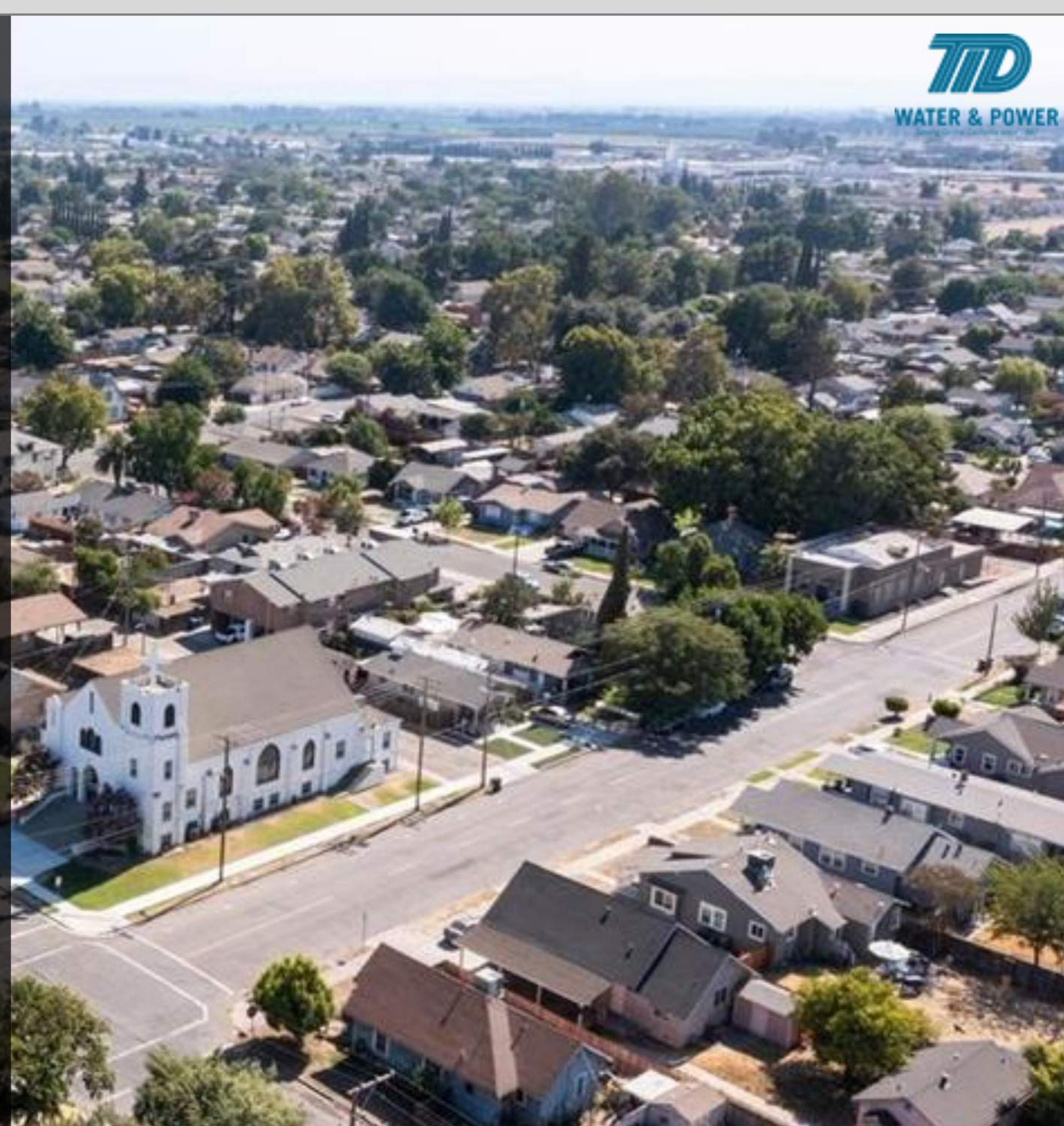
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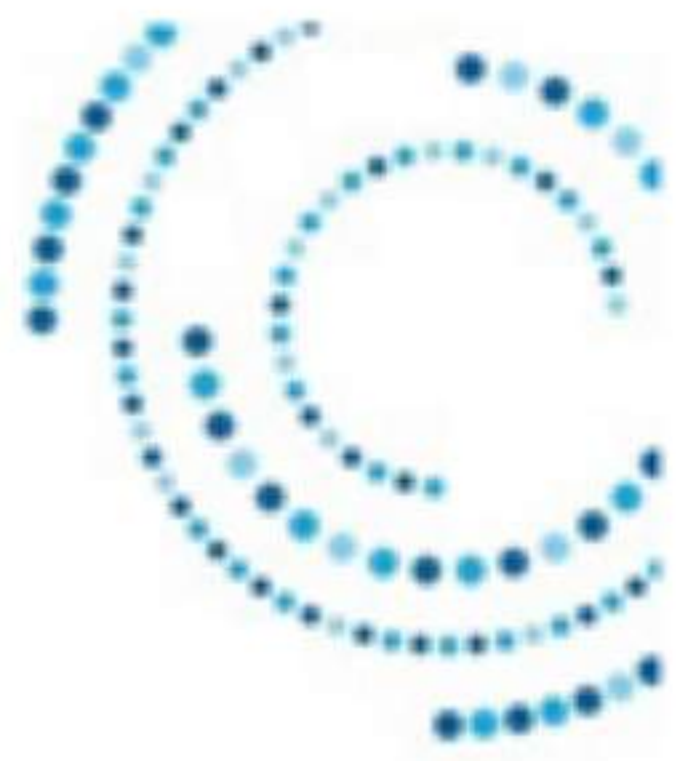
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# Key Study Findings



## Satisfaction Levels

- In 2024, the average positive rating across all company characteristics was 85.5% among residential customers; a 1.7 percentage point increase from 2021. Commercial customers' average positive rating increased significantly to 93.6% from 84.8% in 2021.
- Of those who had a recent customer service interaction, the vast majority (91.2%) of residential customers and all (100%) commercial customers were satisfied with the experience.
- TID scored a net positive rating (advocate + loyal + satisfied customer) of 87.2% among residential customers (from 95.5% in 2021) and 97.0% among commercial customers (from 92.3% in 2021).
- Of those that have experienced an outage in the last 12 months, 88.2% of residential customers were satisfied with the time it took to restore power; a 1.9 percentage point decrease from 2021. Nearly all (97.3%) commercial customers who experienced an outage were satisfied with the time it took to restore power, which marks a significant increase from 2021 (+12.4 percentage points).
- While over 90.0% of residential customers are satisfied with the reliability of TID's electric service, this marks a significant decrease from 2021 (-5.6 percentage points). Nearly all (98.0%) commercial customers remain satisfied with TID's reliability.



## Customer Expectations

- Over four-fifths (87.8% from 88.1% in 2021) of residential customers have their expectations met "all" or "most of the time" by TID, with "competitive/low rates" (68.3%), "reliable service" (51.9%), and "prompt response to any issues" (40.7%) being the top three expectations among the audience.
- Nearly all (97.0% from 89.4% in 2021) commercial customers have their expectations met "all" or "most of the time" by TID, with "competitive/low rates" (64.0%), "reliable service" (40.0%), and "courteous/helpful customer service" (38.0%) being the top three expectations.

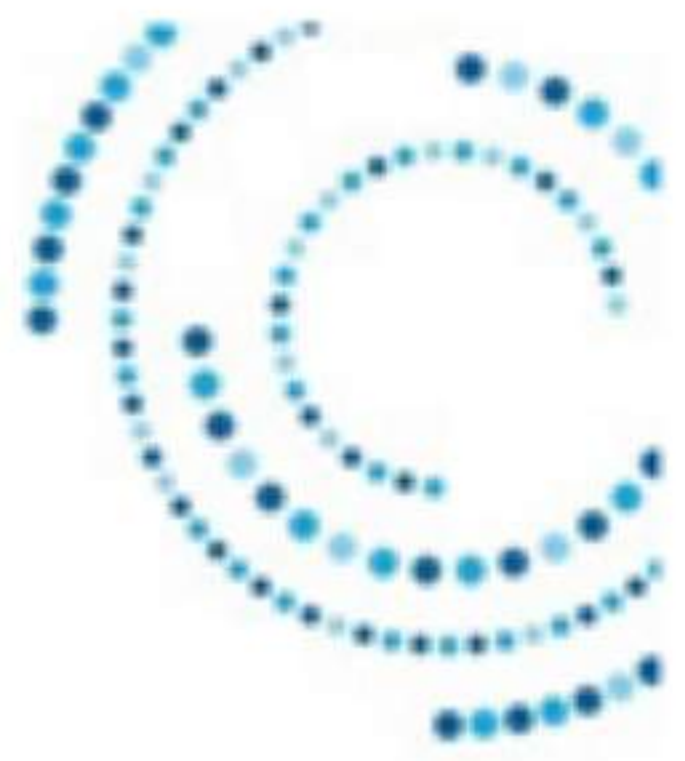
## Rates

- Over four-fifths (84.2%) of residential customers and 93.0% of commercial customers rated the cost of electricity for the value received as "very good" or "good."
- Over two-fifths (41.3%) of residential and 57.0% of commercial customers expect rates to increase by at least half due to the California renewable energy mandate. Notably, 13.0% of residential and 16.0% of commercial customers expect rates to triple.

## Electrification

- Nearly one-third (32.1%) of residential customers are interested in purchasing an EV, with most planning on purchasing beyond next year.
- Nearly one-third (31.9%) of residential and commercial customers are interested in switching to electric appliances/equipment. Notably, 14.2% of residential and 28.0% of commercial customers are already "all-electric."

# Key Study Findings | Demographic Variance



## Age

Older customers are more satisfied with TID than younger customers. For example:

- More customers 55 or older provided positive ratings for their **overall satisfaction with TID** compared to customers younger than 55 (90.9% compared to 79.9%).
- Nearly half (46.9%) of customers older than 55 identified themselves as “loyal customers” of TID compared to 33.3% of customers younger than 55.
- More customers 55 or older were **satisfied with their most recent customer service** interaction compared to customers younger than 55 (94.8% compared to 86.3%).
- More customers 55 or older are **satisfied with the reliability of TID’s electric service** compared to customers younger than 55 (96.5% compared to 86.4%) and customers 55 or older are more satisfied with TID’s outage restoration time compared to younger customers (91.5% compared to 83.9%).
- More customers 55 or older believe the cost of TID’s electric service compared to the value is “very good” or “good” compared to customers younger than 55 (88.8% compared to 78.5%).

**However, younger customers have a greater interest in electrification than older customers.**

- More customers younger than 55 **own an EV** compared to customers 55 or older (14.1% compared to 2.7%), and more customers younger than 55 are **interested in electrifying their home appliances/equipment** compared to customers 55 or older (38.4% compared to 27.9%).



## Agriculture Families

Residents whom indicated personally working in or having a family member working in the agriculture industry:

- Provided significantly lower positive ratings for TID's **openness and honesty with customers**, and **the reliability of their infrastructure** - resulting in a significantly lower average satisfaction rating.

Residents with Family Members Working in Agriculture:	Yes	No
Communicating with customers	81.5	87.9
Responding promptly to customers	85.5	90.3
Helping customers conserve electricity	75.8	83.5
Being open and honest about company operations and policies	75.4	86.3
Reliable infrastructure	85.8	93.4
Providing good service and value for the cost of electricity	83.6	88.1
Community involvement	82.8	82.8
Helpful and knowledgeable staff	90.5	90.3
Overall satisfaction with TID	84.0	88.7
Average	82.8	87.9

*Audiences: Residential, n=177 (Younger than 55), n=258 (55 or older), n=131 (Family works in agriculture), n=290 (Family does not work in agriculture)  
Statistical significance calculated at a 95% confidence level*

# Customer Ratings | Company Characteristics

In 2024, the average positive rating across all company characteristics was 85.5% among residential customers; a slight increase from 2021. Notably, significantly more residential customers provided positive ratings for TID's "community involvement" in 2024. Commercial customers' average positive rating increased significantly to 93.6% from 84.8% in 2021. Four of the nine characteristics received significantly more positive ratings, with the largest increase being recorded for "responding promptly to customers" (+11.9 percentage points).

*"Don't know" responses removed; Ratings 7-10 shown*

	Residential			Commercial		
	2019	2021	2024	2019	2021	2024
Communicating with customers	87.5	84.0	84.9	85.1	86.8	94.5
Responding promptly to customers	87.6	84.9	88.6	87.9	87.0	98.9
Helping customers conserve electricity	82.6	76.2	80.0	81.6	71.1	82.9
Being open and honest about company operations and policies	84.1	82.2	82.0	76.9	80.9	89.9
Reliable infrastructure	91.1	89.9	90.5	83.0	86.8	96.9
Providing good service and value for the cost of electricity	83.6	85.7	86.2	78.6	89.9	92.8
Community involvement	82.1	74.6	82.2	74.3	83.8	93.0
Helpful and knowledgeable staff	90.4	88.7	89.0	84.6	88.2	96.9
Overall satisfaction with TID	88.7	87.8	86.3	79.2	89.1	97.0
Average	86.4	83.8	85.5	81.2	84.8	93.6

Q1-9: Please read a list of different organizational characteristics. For each one, please rate TID on a scale of one (1) to ten (10) where ten is very good and one is very poor.

Residential: n=229-399 (2019), n=295-395 (2021), n=353-437 (2024); Commercial: n=74-101 (2019), n=74-101 (2021), n=71-100 (2024)

Cell color indicates statistical significance at a 95% confidence level, denoting whether it is higher or lower than the previous iteration of the survey.

# Residential Ratings | PPDS Comparison Metrics

Among residential customers, TID exceeded both the California and National PPDS averages for all characteristics and the average positive rating. Notably, TID exceeded the California and National averages by 20.5 and 25.8 percentage points, respectively, for "reliable infrastructure" and by 20.1 and 25.3 percentage points, respectively, for "providing good service and value for the cost of electricity."

*"Don't know" responses removed; Ratings 7-10 shown*

	Turlock Irrigation District	California PPDS	National PPDS
	2024	2023	2023
Communicating with customers	84.9	70.7	65.3
Responding promptly to customers	88.6	69.4	65.7
Helping customers conserve electricity	80.0	63.2	54.0
Being open and honest about company operations and policies	82.0	65.5	59.7
Reliable infrastructure	90.5	70.0	64.7
Providing good service and value for the cost of electricity	86.2	66.1	60.9
Community involvement	82.2	65.8	59.3
Helpful and knowledgeable staff	89.0	70.4	65.5
Overall satisfaction with TID	86.3	72.2	68.0
Average	85.5	68.1	62.6

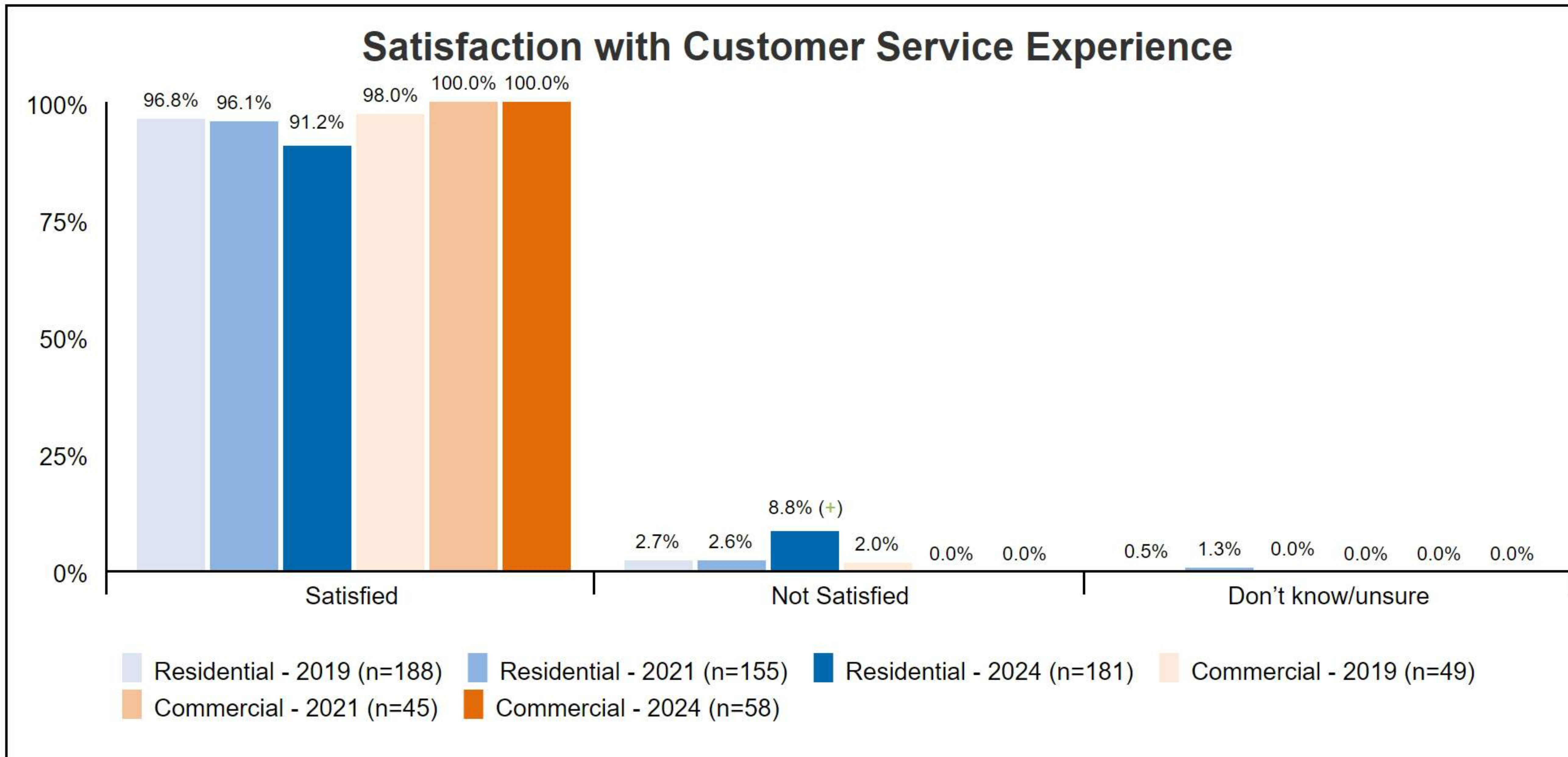
Q1-9: Please read a list of different organizational characteristics. For each one, please rate TID on a scale of one (1) to ten (10) where ten is very good and one is very poor.

RES: n=229-399 (2019), n=295-395 (2021), n=353-437 (2024)



# Customer Ratings | Customer Service Satisfaction

Despite a slight decrease from 2021, over 90.0% of residential customers remained satisfied with their customer service experience, with the most common reasons for the interaction being "to pay bill," "report an outage," and for a "question on a bill (not a complaint)." All of the commercial customers were satisfied with their customer service interaction, with the main reasons for the contact being "to pay bill," "question on a bill (not a complaint)," and to "start or open service."



**40.9% | 58.0%**  
of residential and commercial customers, respectively, had an interaction with TID in the past year

### Top Reasons for Interaction

**Residential**

- 31.5% To pay bill
- 13.3% Report an Outage
- 11.0% Question on bill (not a complaint)

**Commercial**

- 25.9% To pay bill
- 17.2% Question on bill (not a complaint)
- 15.5% Start or open service

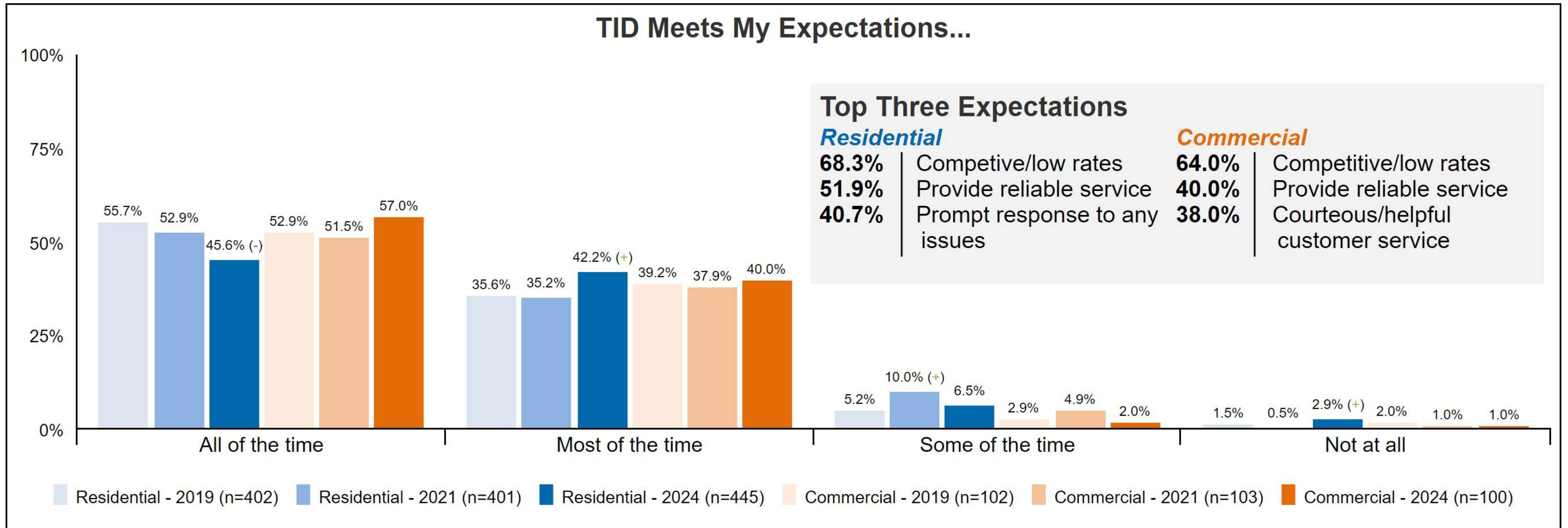
*Top 3 responses shown*

Q11: Please indicate the purpose of the call or visit.  
Q12: How satisfied were you with the service provided by the TID employee?

(+/-) indicates statistical significance at a 95% confidence level, denoting whether it is higher or lower than the previous iteration of the survey.

# Customer Ratings | Meeting Expectations

While over four-fifths (87.8% from 88.1% in 2021) of residential customers have their expectations met "all" or "most of the time" by TID, notably, significantly fewer residential customers have their expectations met "all of the time" compared to 2021. Nearly all (97.0% from 89.4% in 2021) commercial customers have their expectations met "all" or "most of the time" by TID. The top expectations among both audiences are "competitive/low rates" and "reliable service."



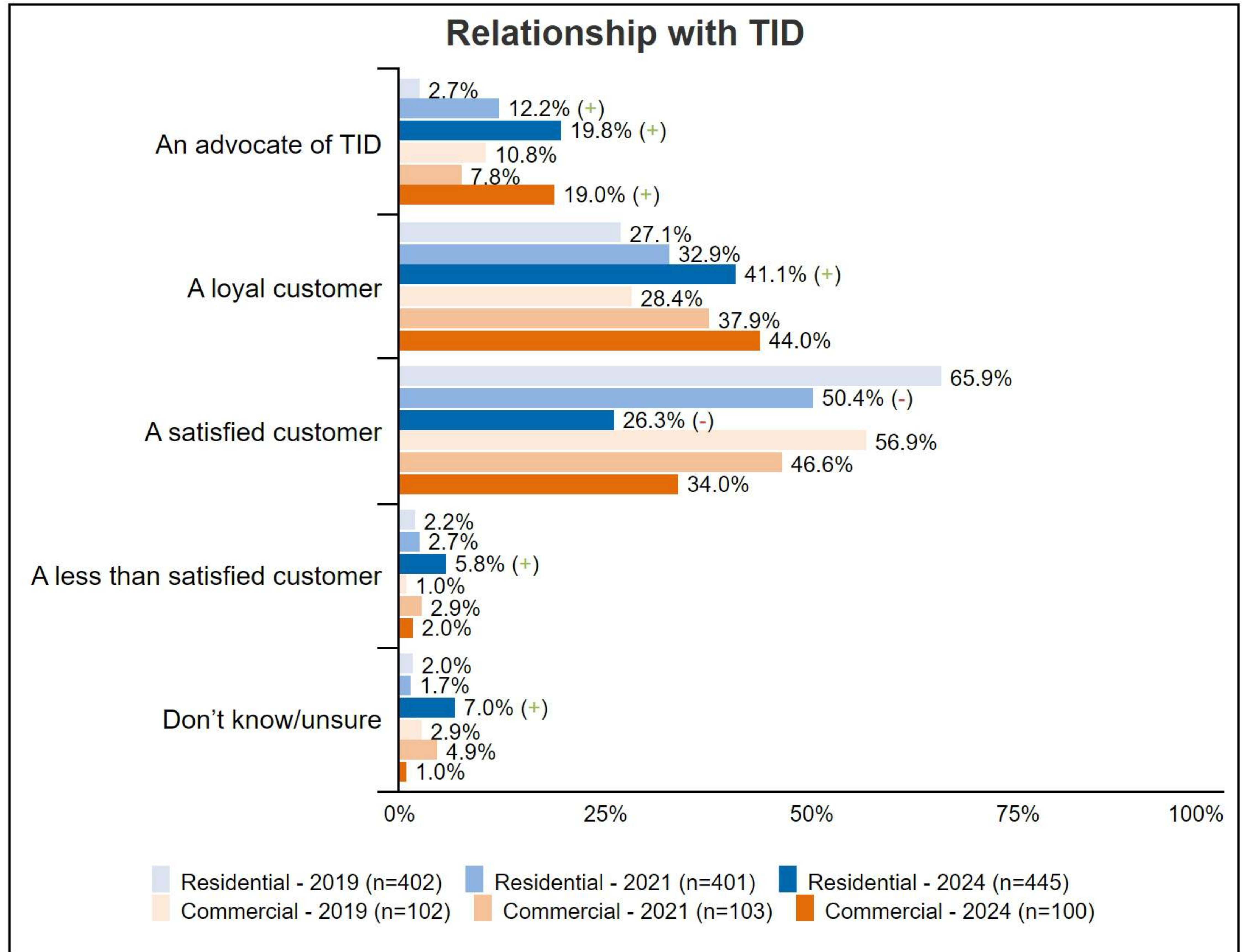
Q14: Which, if any, of the following are among your top three expectations of TID?

Q15: To what extent does TID meet your expectations?

(+/-) indicates statistical significance at a 95% confidence level, denoting whether it is higher or lower than the previous iteration of the survey.

# Customer Relationship | Net Positive Rating

In 2024, TID scored a net positive rating (advocate + loyal + satisfied customers) of 87.2% among residential customers (from 95.5% in 2021) and 97.0% among commercial customers (from 92.3% in 2021). Despite the decreased rating, significantly more residential customers are either "an advocate of TID" or "a loyal customer."

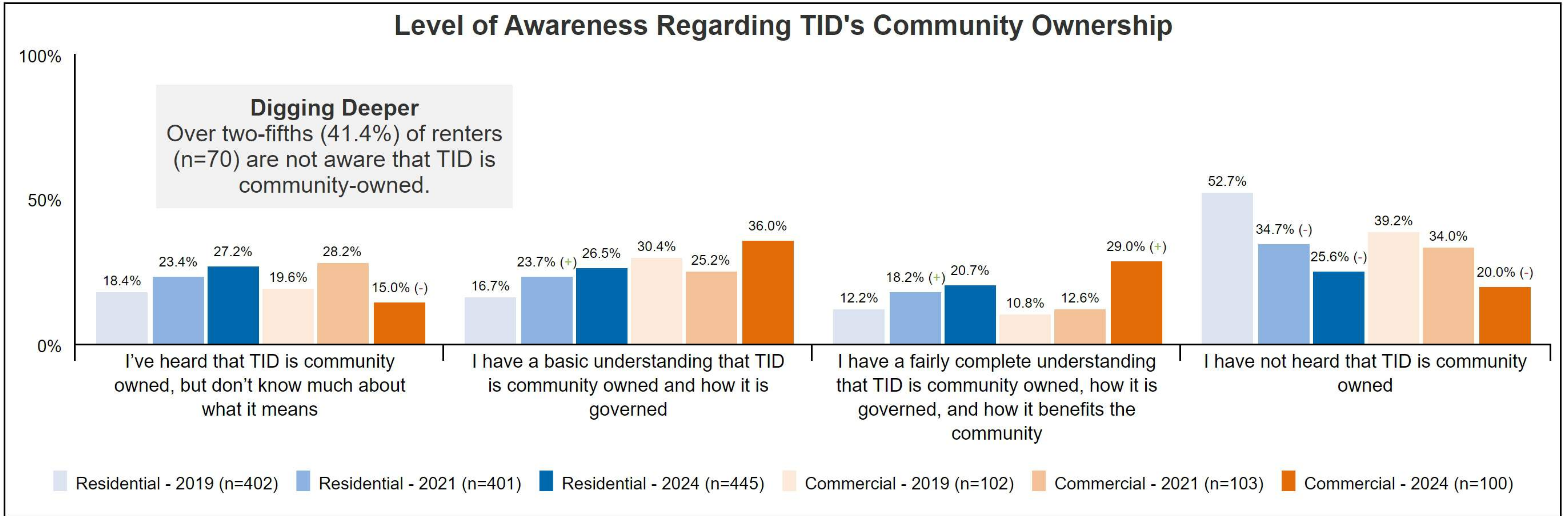


Q16: How would you best describe your relationship with TID?

(+/-) indicates statistical significance at a 95% confidence level, denoting whether it is higher or lower than the previous iteration of the survey.

# Awareness/Understanding | Local Ownership

Significantly fewer residential and commercial customers reported they “had not heard that TID is community owned;” indicating higher awareness of TID's community ownership. More residential and commercial customers reported they have either a "basic understanding that TID is community owned and how it is governed" or "have a fairly complete understanding" of TID's community ownership (47.2% from 41.9% for residential customers, and 65.0% from 37.8% for commercial customers).

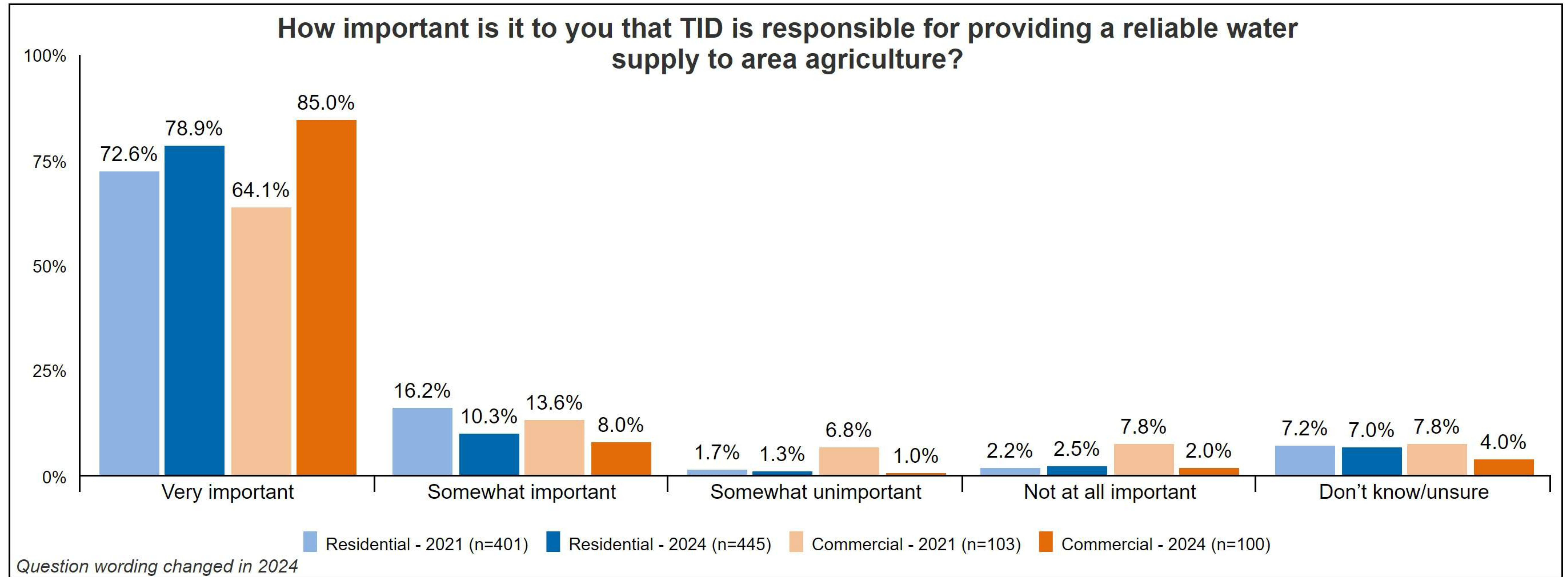


Q17: TID is a "Community Owned Utility." Which of the following statements best reflects your level of awareness regarding TID's community ownership? Would you say...

(+/-) indicates statistical significance at a 95% confidence level, denoting whether it is higher or lower than the previous iteration of the survey.

# Importance | TID's Responsibility to Water Supply

Nearly nine-out-of-ten (89.2%) residential customers and 93.0% of commercial customers indicated it is "very" or "somewhat important" to them that TID provides the water supply for area agriculture.

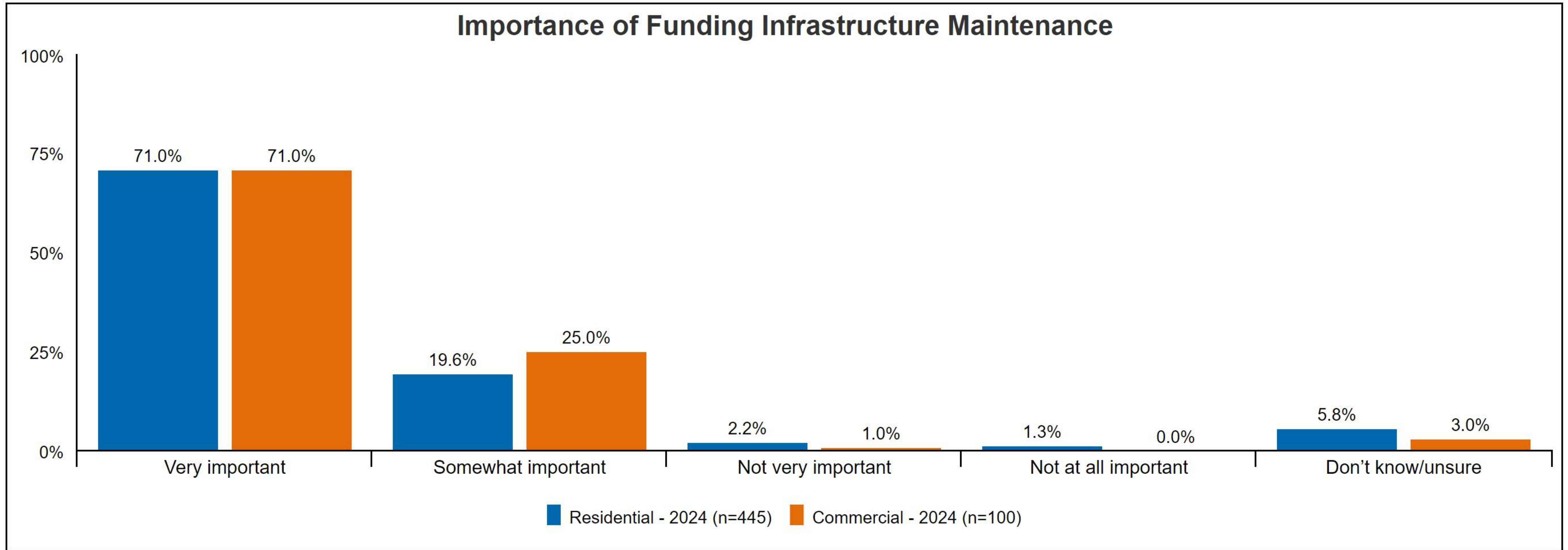


Q19: Regardless of whether you are currently receiving irrigation water service from TID, how important is it to you that TID is responsible for providing a reliable water supply to area agriculture? Would you say...

(+/-) indicates statistical significance at a 95% confidence level, denoting whether it is higher or lower than the previous iteration of the survey.

# Importance | Allocation of Revenue

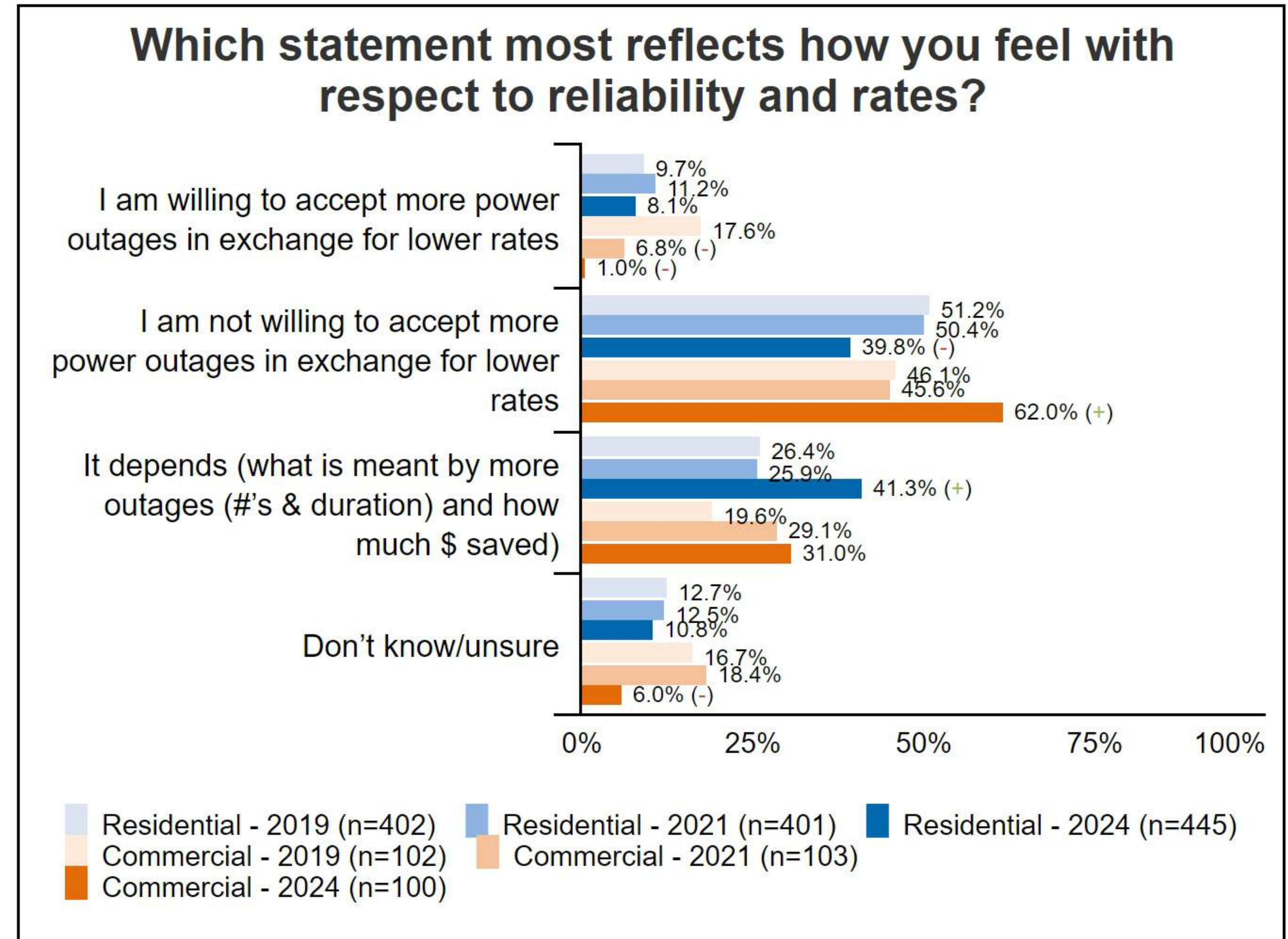
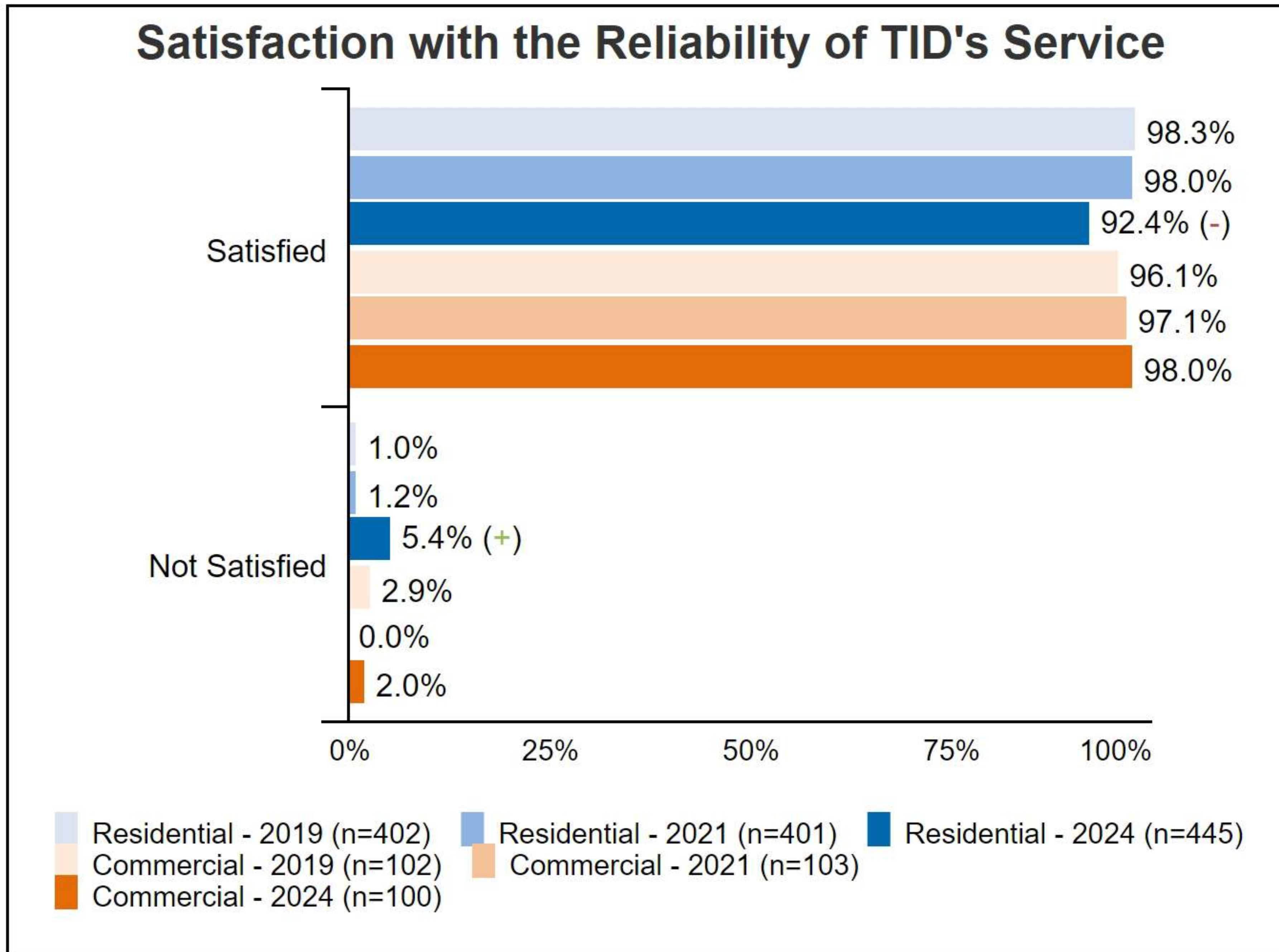
The vast majority of residential (90.6%) and commercial (96.0%) customers believe funding infrastructure maintenance is either "very important" or "somewhat important," with 71.0% of each audience indicating it is "very important."



Q26: How important would you say it is that TID invests a significant amount of money in maintaining infrastructure such as their power generation facilities?

# Reliability | Satisfaction with TID's Service

While over 90.0% of residential customers are satisfied with the reliability of TID's electric service, this marks a significant decrease from 2021 (-5.6 percentage points). Nearly all commercial customers are satisfied with TID's reliability. The majority of commercial customers are not willing to sacrifice reliability for lower rates, however, more residential customers are considering the trade-off with over two-fifths indicating "it depends."



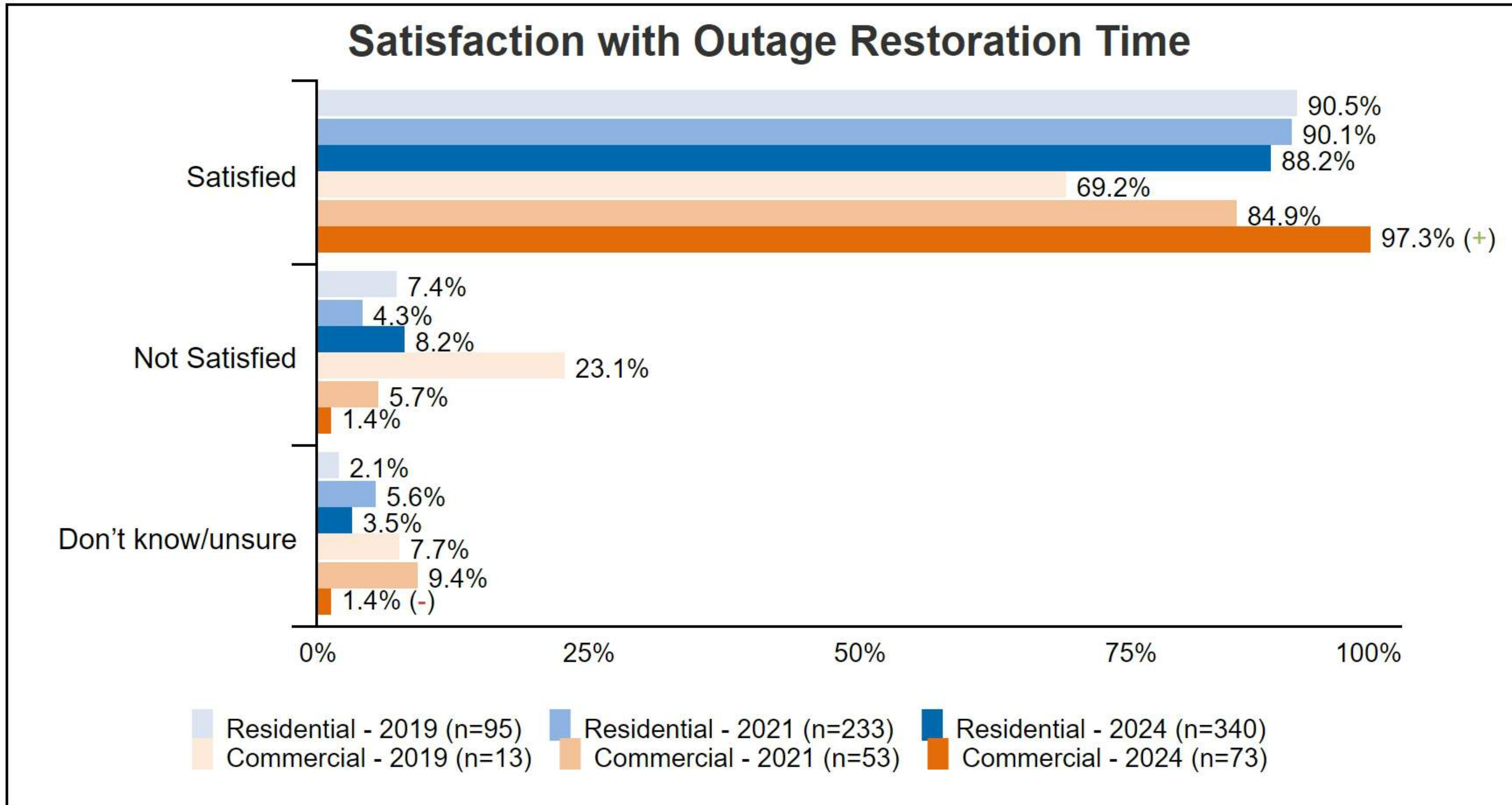
Q22: Overall, how satisfied would you say you are with the reliability of TID's electrical service? Would you say...

Q23: Which statement most reflects how you feel with respect to reliability and rates? Would you say...

(+/-) indicates statistical significance at a 95% confidence level, denoting whether it is higher or lower than the previous iteration of the survey.

# Outages | Satisfaction with Restoration Time

Nearly all commercial customers who experienced an outage were satisfied with the time it took to restore power; a significant increase from 2021 (+12.4 percentage points). Of the residential customers that had an outage in the last 12 months, 88.2% were satisfied with the time it took to restore power. Roughly two-thirds of both residential and commercial customers prefer receiving text messages from TID for outage updates.



### Preferred Communication Channel for Outage Updates

	Residential	Commercial
Text message from TID	67.2	66.0
TID website	14.6	9.0
Email from TID	10.6	8.0
On a TID mobile app	4.9	3.0
Other	2.7	14.0

Q20: If you have experienced a power outage in the last 12 months, how satisfied were you with the outage restoration time?

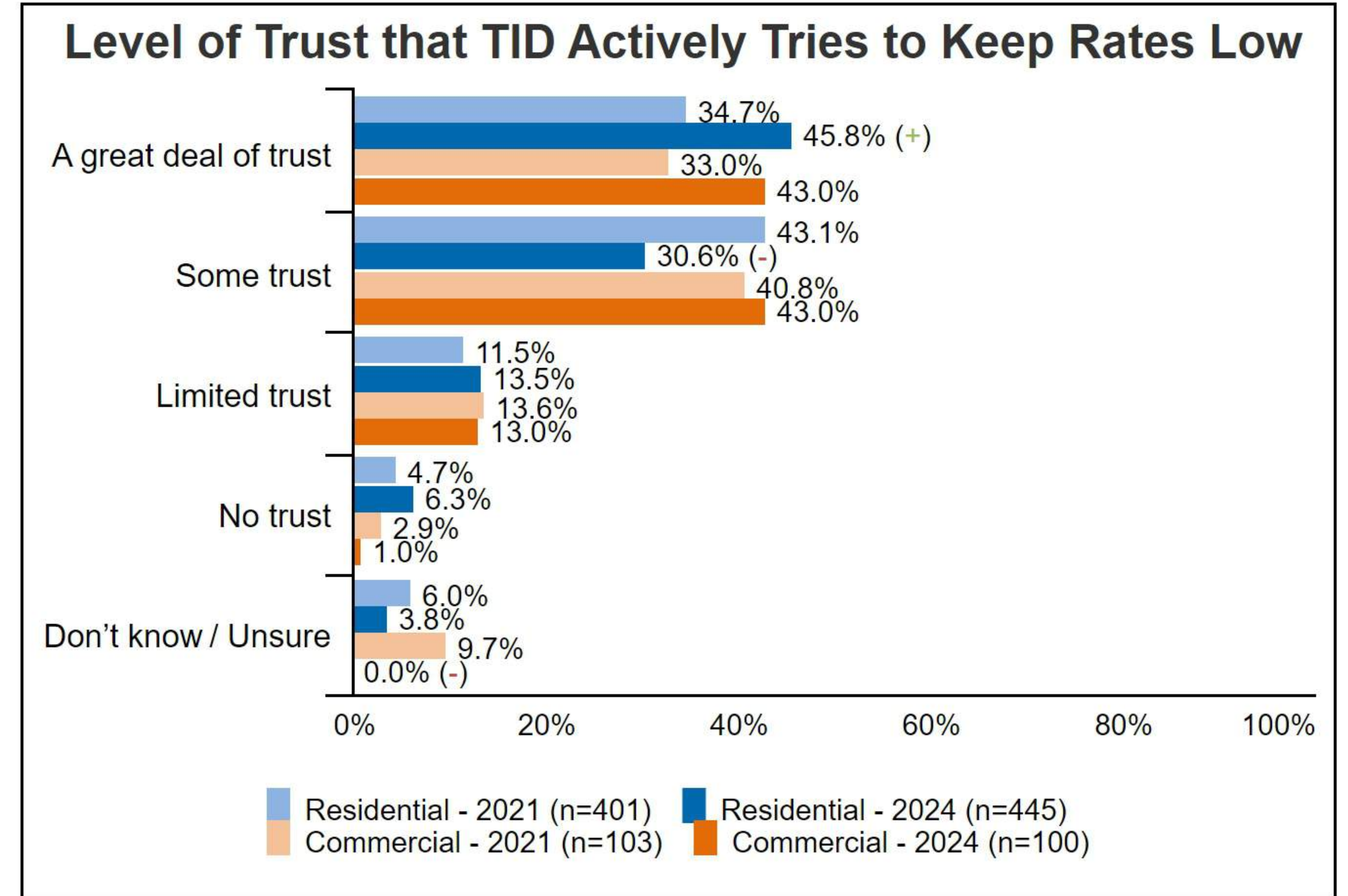
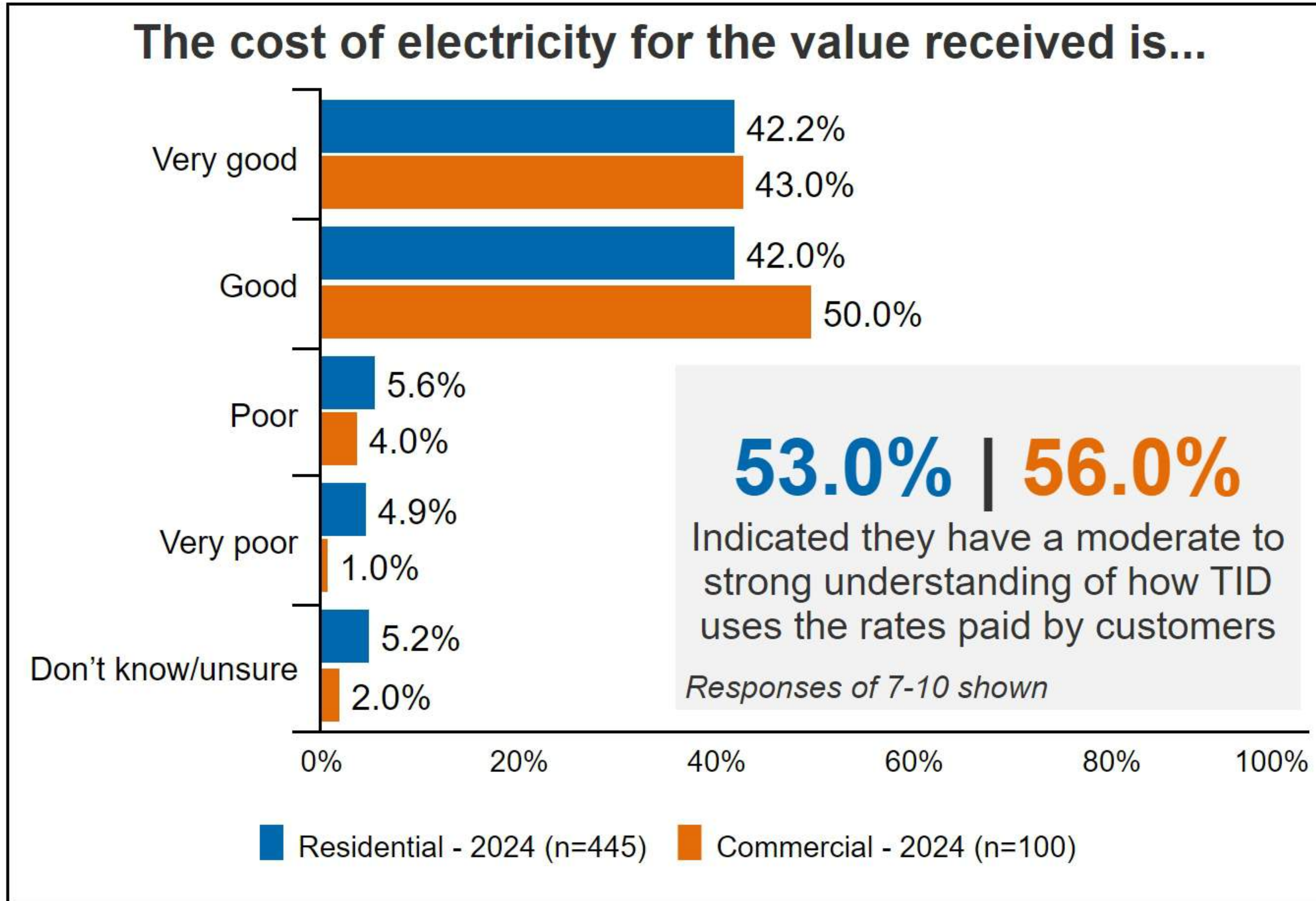
Q21: During a power outage, how would you like to get information about the outage, cause of the outage, and estimated restoration times?

(+/-) indicates statistical significance at a 95% confidence level, denoting whether it is higher or lower than the previous iteration of the survey.



# Value | Perception of Rates

Over four-fifths (84.2%) of residential customers and 93.0% of commercial customers rated the cost of electricity for the value received as "very good" or "good." Over two-fifths (45.8%) of residential customers have "a great deal of trust" that TID does all it can to keep rates low; significantly more compared to 2021. A similar rate of commercial customers (43.0%) also have "a great deal of trust" that TID does all it can to keep rates low.



Q24: How would you rate the overall cost of electricity as compared to the value you receive from TID? Would you say...

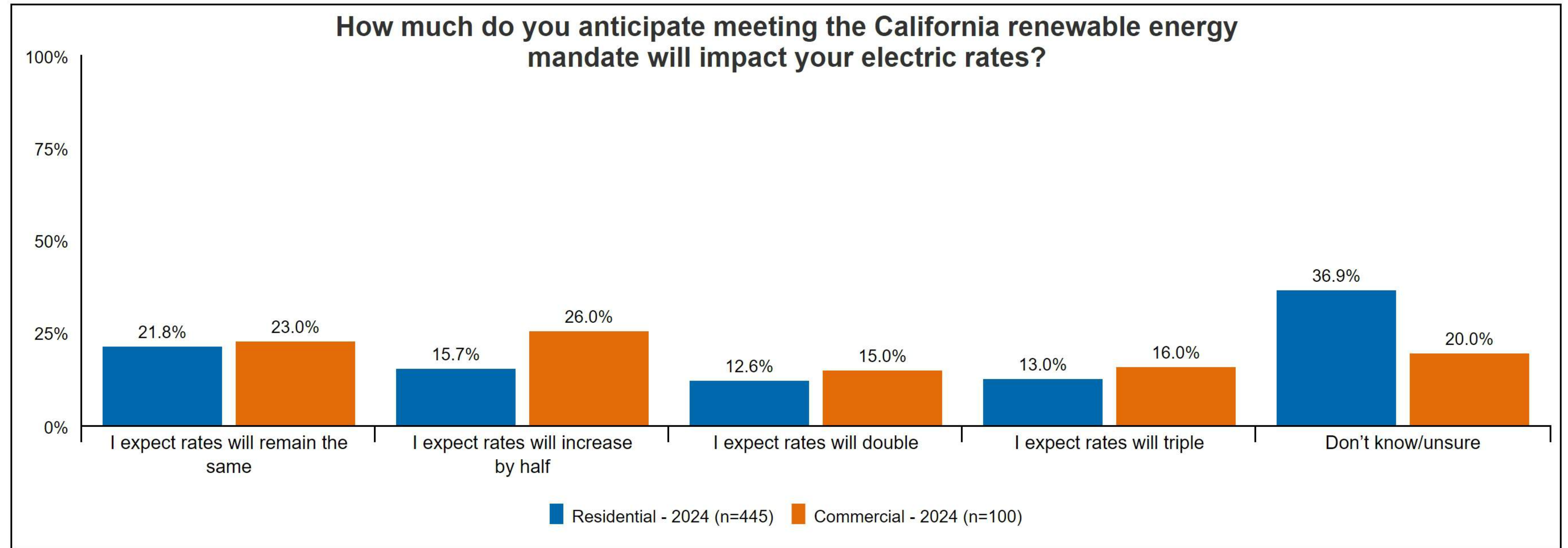
Q25: How would you rate your level of understanding of how TID uses the rates paid by customers? Please rate your level of understanding on a scale of one (1) to ten (10) where one is no understanding at all and ten is very strong level of understanding.

Q27: How would you describe the level of trust you have that TID does all it can to keep its electric rates low?

(+/-) indicates statistical significance at a 95% confidence level, denoting whether it is higher or lower than the previous iteration of the survey.

# Value | Impact of California's Renewables Mandate

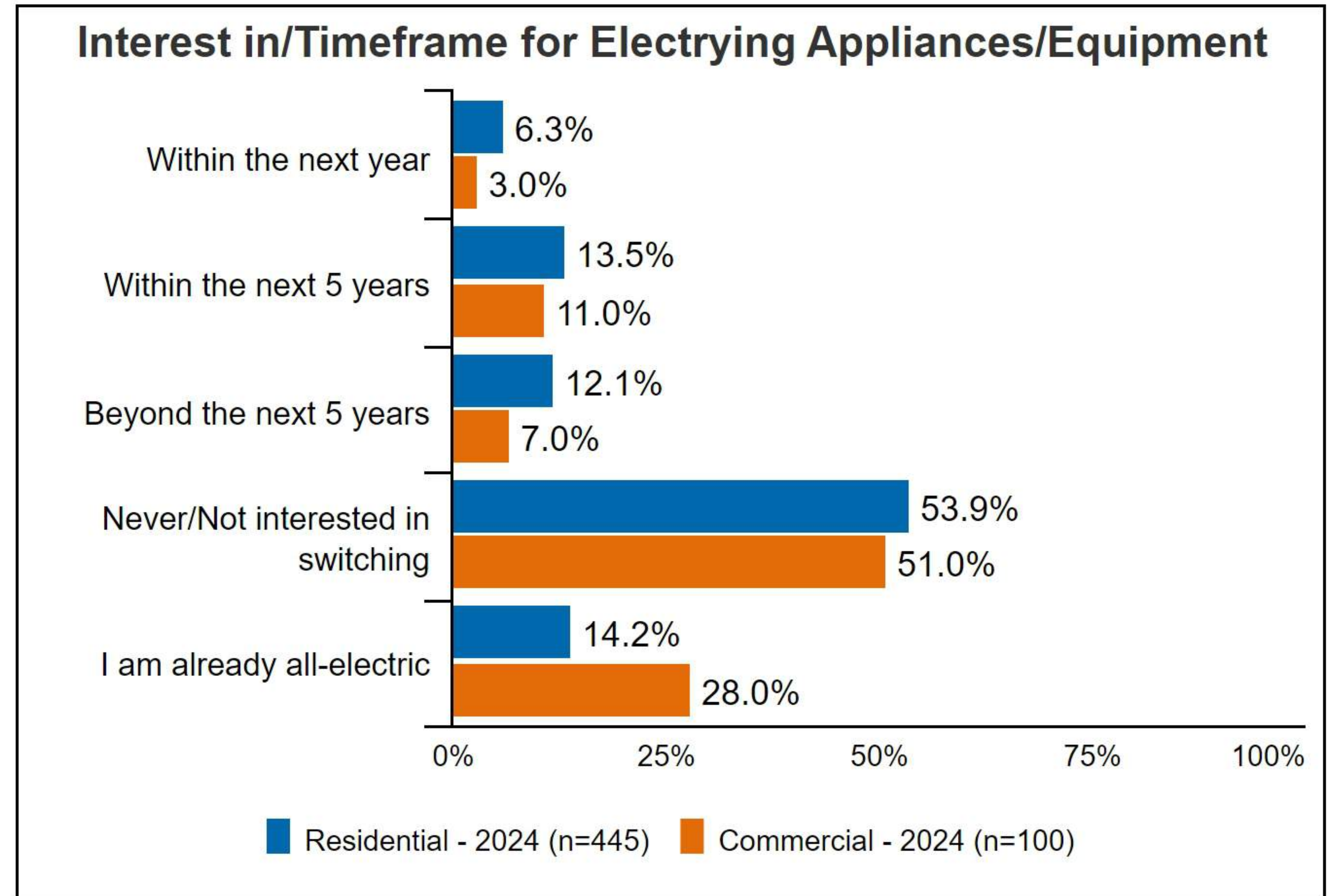
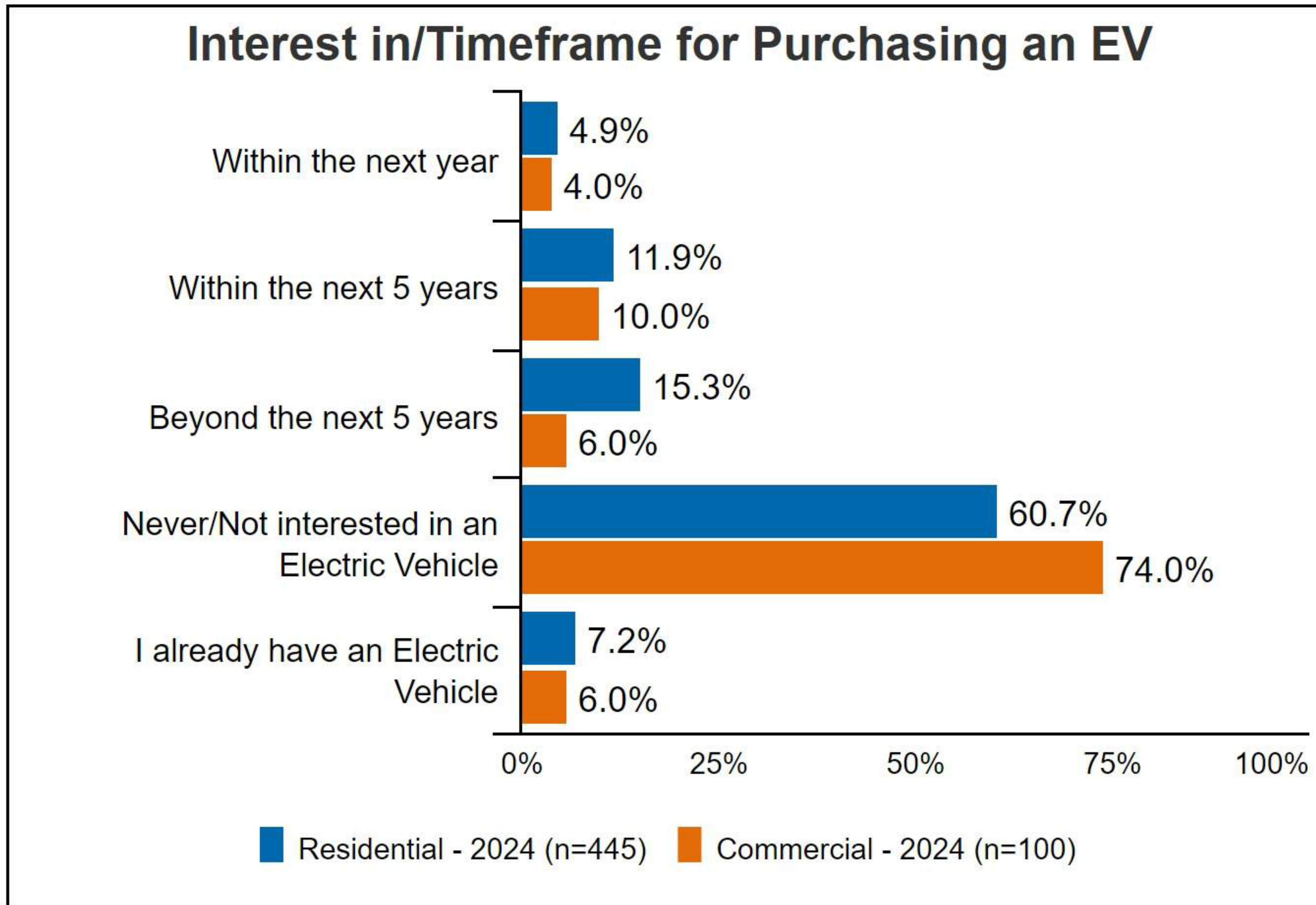
While over one-fifth of residential and commercial customers do not expect California's renewable energy mandate to affect rates, 41.3% of residential and 57.0% of commercial customers expect rates to increase by at least half due to the mandate. Notably, 13.0% of residential and 16.0% of commercial customers expect rates to triple.



Q28: California has enacted a renewable mandate that requires utilities to provide 100% carbon-free energy by 2045. How much do you anticipate meeting this goal will impact your electric rates?

# Energy Efficiency | Interest in Electrification

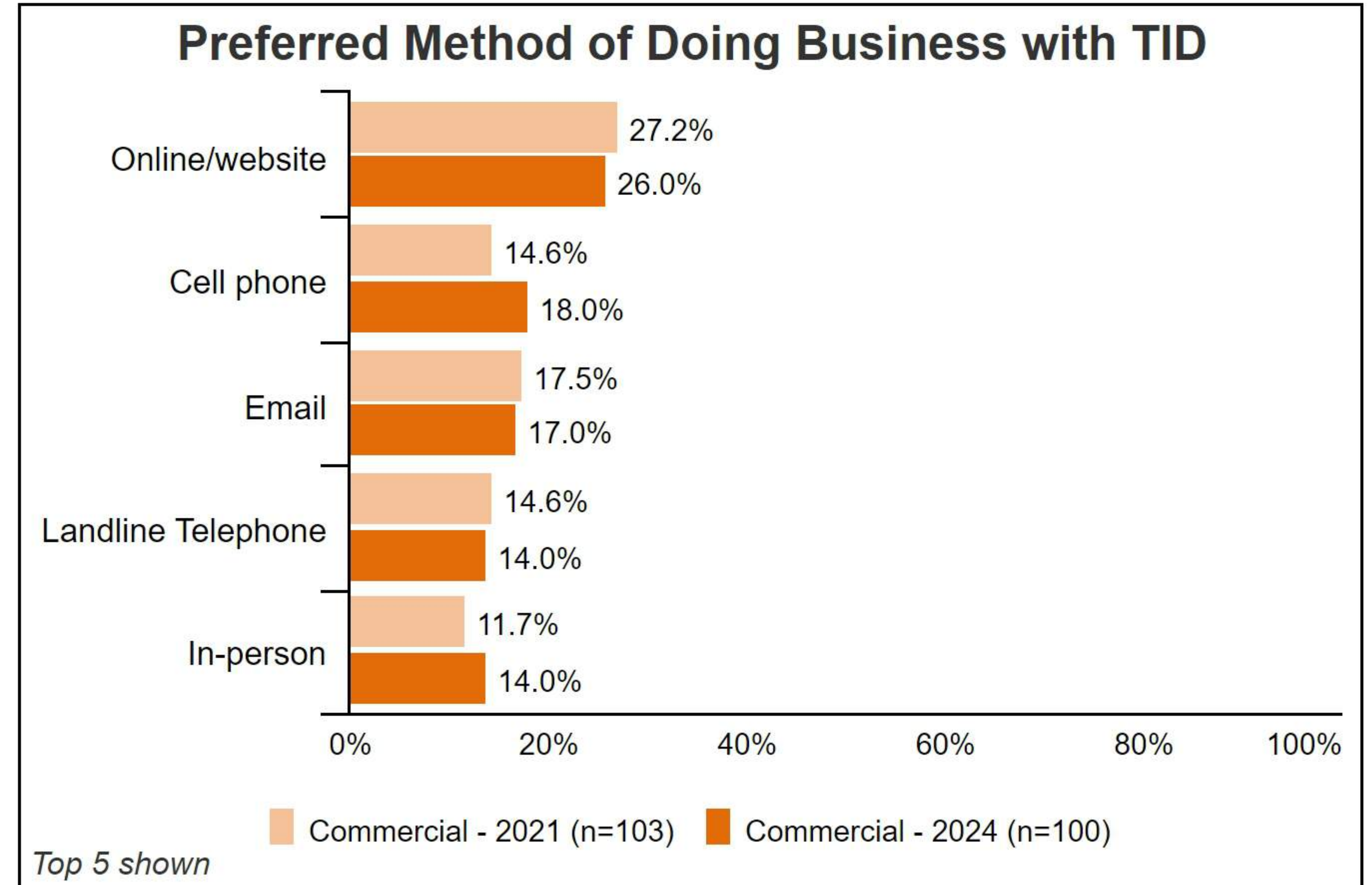
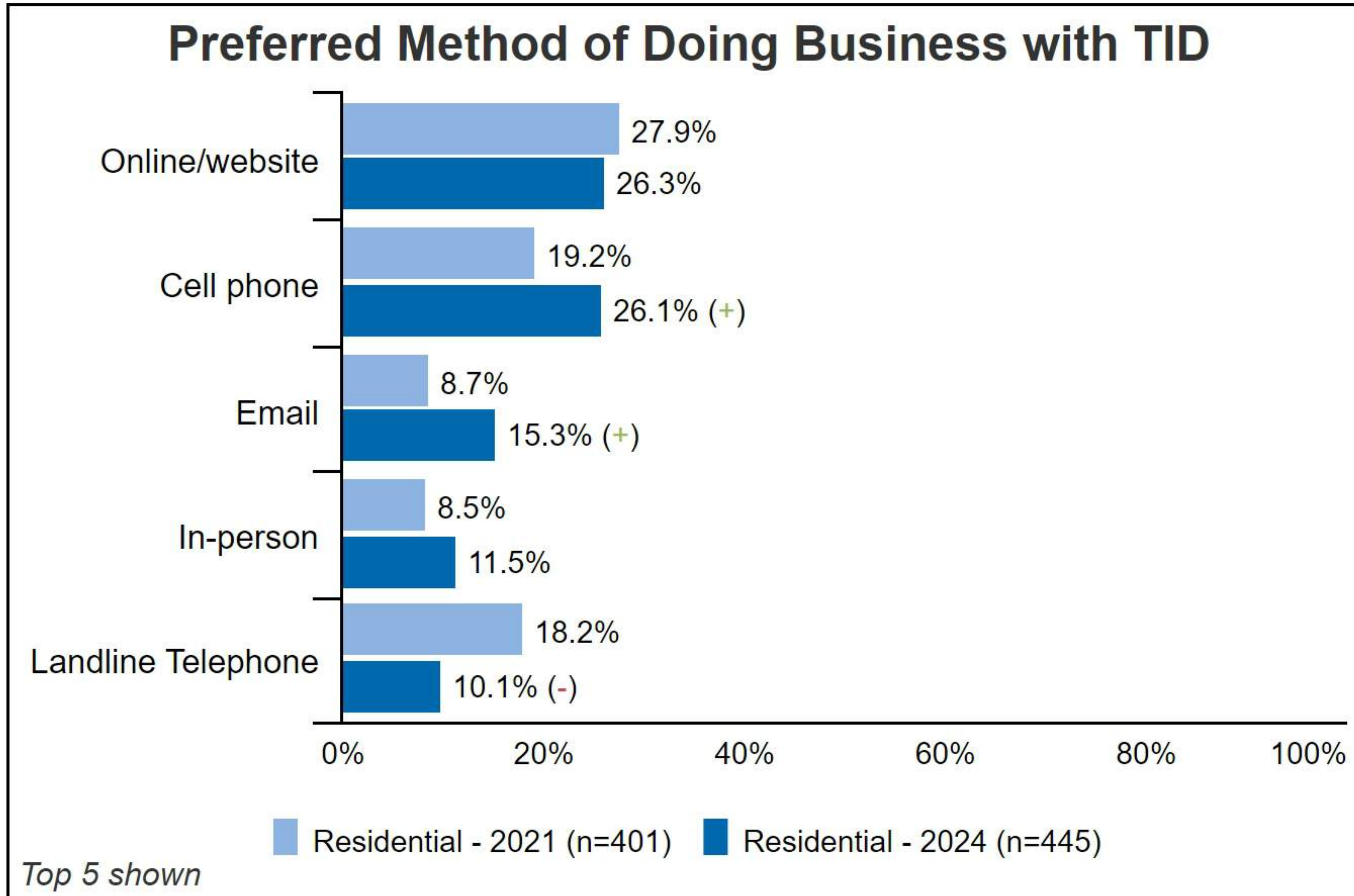
Roughly three-fifths of residential customers and nearly three-quarters of commercial customers are not interested in an EV. However, nearly one-third (32.1%) of residential customers and one-fifth (20.0%) of commercial customers are interested in purchasing one, with most planning on waiting at least a year. Over half of residential and commercial customers are also not interested in switching to electric appliances/equipment. Although, 14.2% of residential and 28.0% of commercial customers are already "all-electric."



Q29: Are you currently interested in purchasing an Electric Vehicle? If so, in what timeframe would you be looking to make that purchase?  
 Q30: Would you be interested in switching from gas or propane-powered appliances and equipment (i.e. stove, heaters, etc.) to all electric appliances and equipment? If so, in what timeframe would you be looking to make that switch?

# Communication | Preferred Ways to do Business

Roughly one-quarter of residential customers prefer to do business with TID "online" and another quarter prefer doing business by "cell phone." Similarly, over a quarter of commercial customers prefer to do business with TID "online" while 18.0% prefer using a "cell phone."

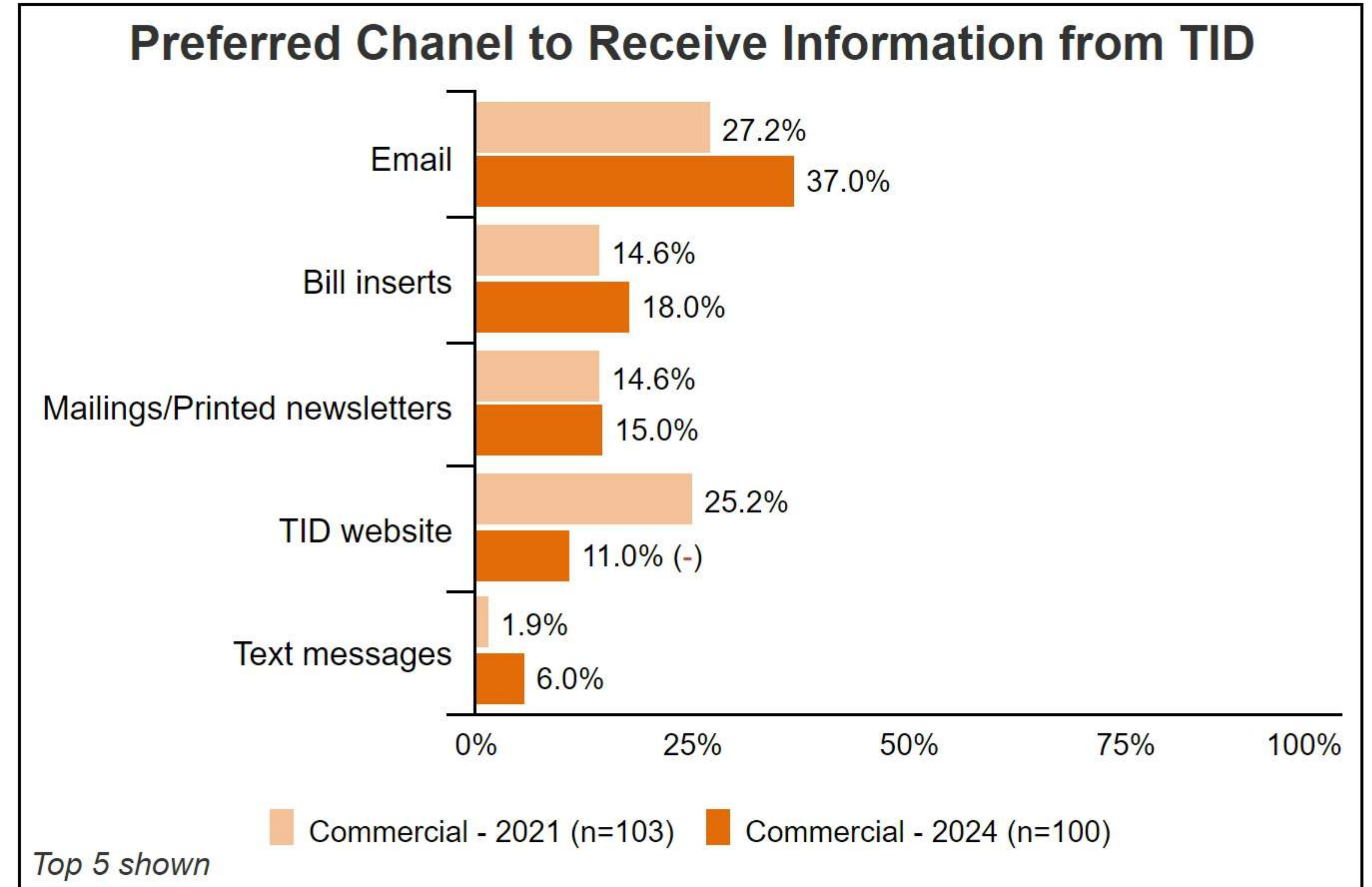
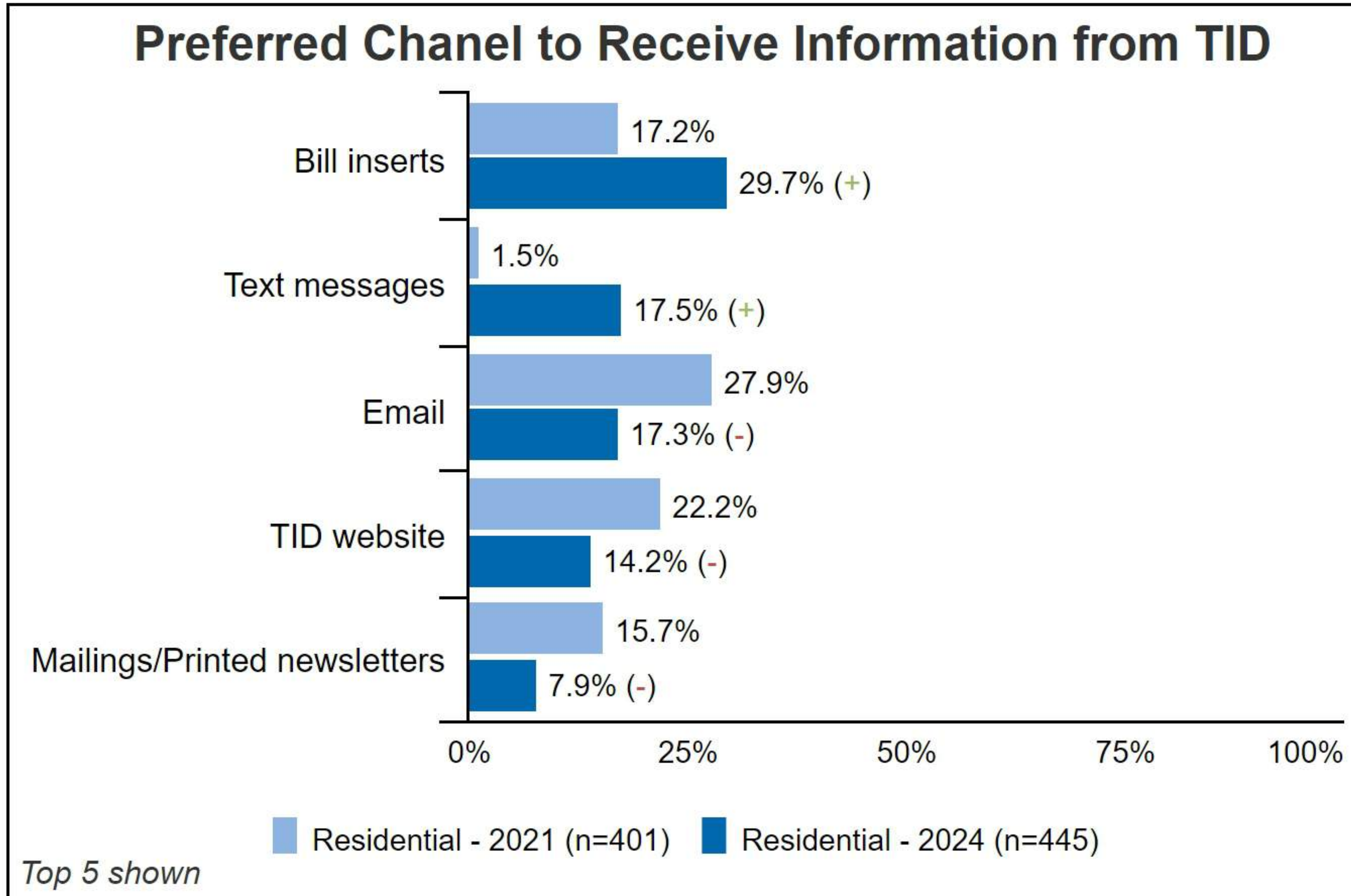


Q18: Which of the following is your preferred method for doing business with TID?

(+/-) indicates statistical significance at a 95% confidence level, denoting whether it is higher or lower than the previous iteration of the survey.

# Communication | Preferred Channels

Over one-quarter of residential customers prefer to receive information from TID through "bill inserts," followed by 17.5% through "text messages," and 17.3% through "email." Nearly two-fifths of commercial customers prefer to receive information from TID through "email," followed by 18.0% through "bill inserts," and 15.0% through "mailings/printed newsletters."



Q31: How would you prefer to receive information from TID about TID programs and services?

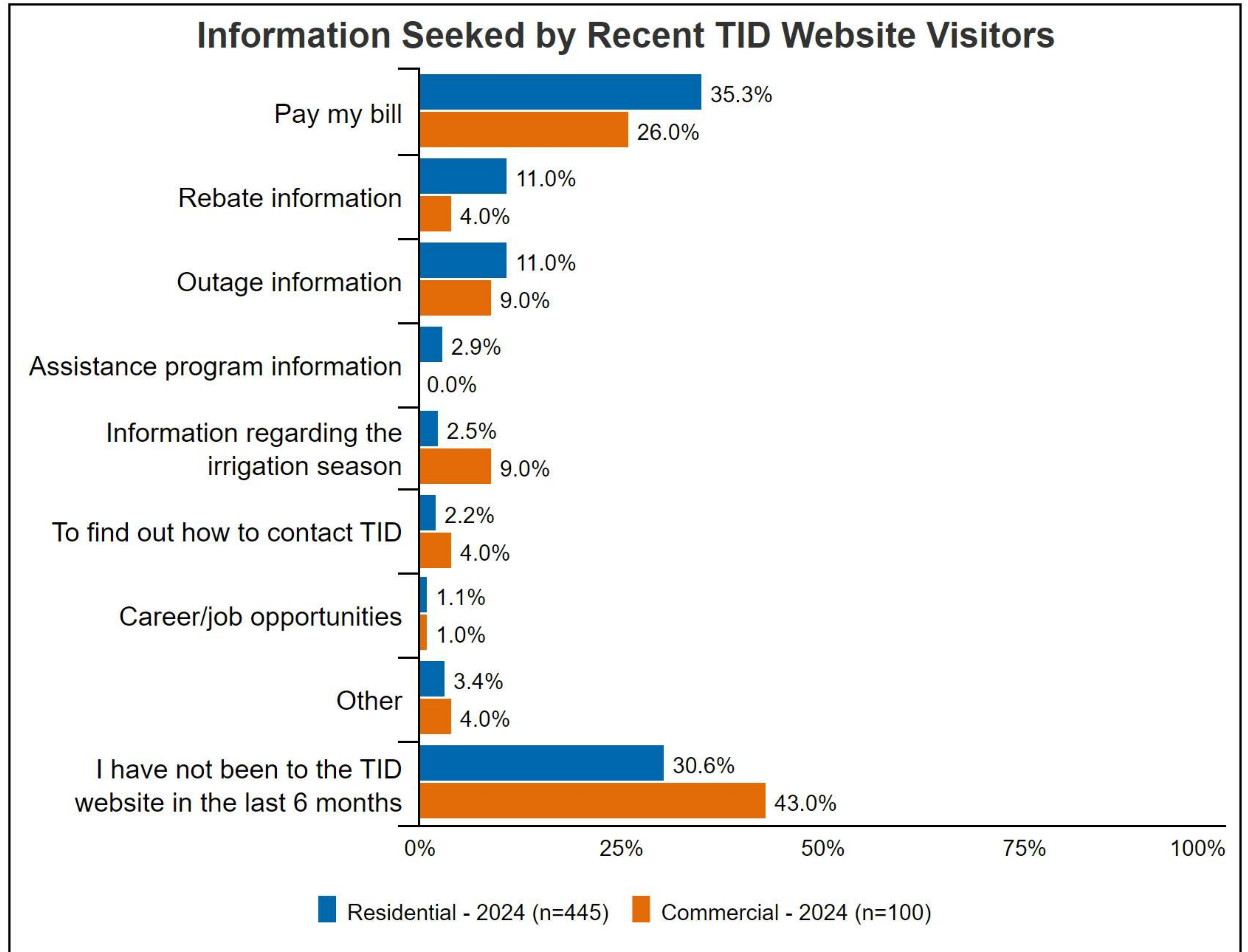
(+/-) indicates statistical significance at a 95% confidence level, denoting whether it is higher or lower than the previous iteration of the survey.

# Communication | Reasons to Visit TID's Website

The most common reason residential and commercial customers visited the TID website in the last six months was to "pay my bill." The next most common reasons for residential customers were to explore "rebate information" and "outage information," whereas commercial customers were looking for "outage information" and "information regarding the irrigation season."

Notably, nearly one-third of residential and over two-fifths of commercial customers did not visit the TID website in the last six months.

Q32: If you have been to the TID website in the last 6 months, what information were you looking for?



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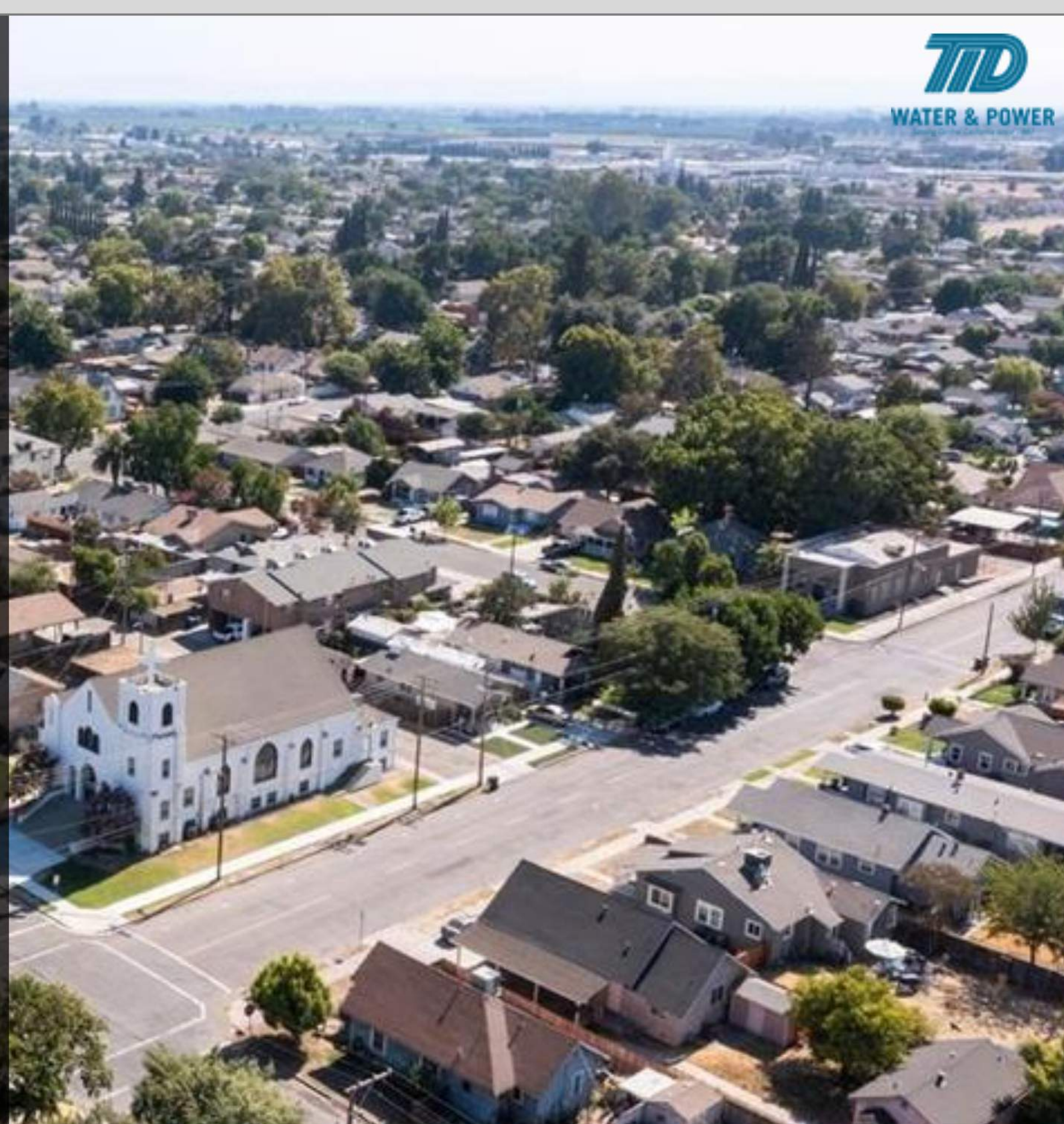
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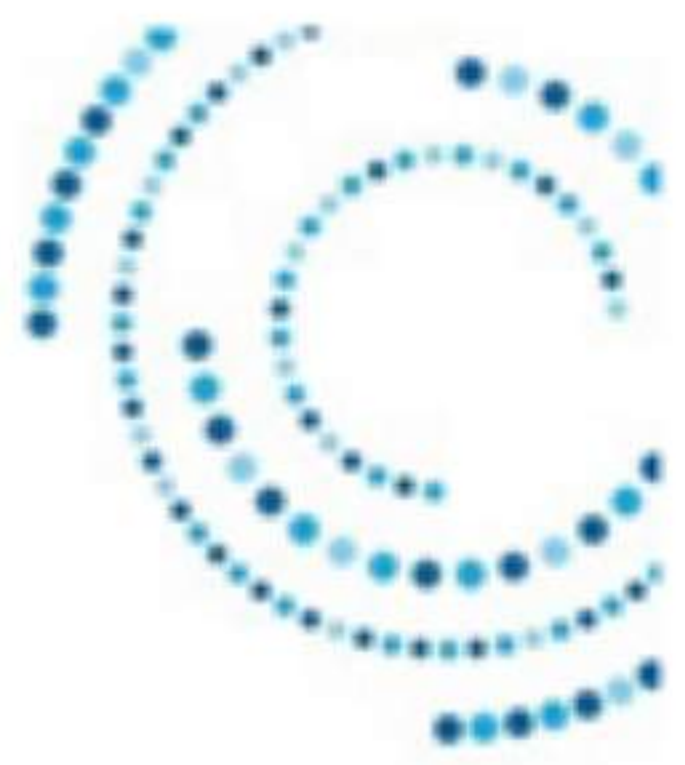
SECTION THREE  
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SECTION FIVE  
Aggregate Data (Provided Separately)



# Considerations



## Mitigate Rate Concerns through Transparency

Data indicate that multiple overlapping factors may be affecting how customers perceive their rates from TID. These factors include:

- Concerns over how California's renewables mandate will increase customer rates,
- The importance of continually investing in infrastructure maintenance, and
- A general lack of understanding of how TID uses the rates paid by customers.

These findings present an opportunity to reevaluate and revamp TID's "How to Read Your Bill" webpage

(<https://www.tid.org/customer-service/billing-payments/how-to-read-your-bill>) and actively promote this resource within the community.

While this webpage is a good starting point for customers seeking more information regarding the charges on their bills, it would be beneficial to expand the content to explain how the different charges are used by the utility and which priorities they support.



## Maximizing the Focus Group Opportunity

The vast majority of TID's residential customers provided positive ratings throughout the survey, however, there is a discrepancy between customers 55 or older and those younger than 55. The data found that significantly more customers 55 or older provided positive ratings than customers younger than 55 for several satisfaction metrics such as overall satisfaction with TID.

Should TID commission the follow-up focus groups among residential and commercial customers, it is recommended that TID split the two residential focus groups between age groups. Hosting one group of customers under age 55 and vice versa will allow a more free-flowing conversation in each group to deep dive how these different ages want to interact with TID. Leveraging the groups in this way will also help TID personnel to maximize learnings on how these two groups differ and how best to serve each of their competing needs.



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WHAT'S NEXT.



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