J.D. POWER

2020 Water Residential Customer Satisfaction Study

Orange County Utilities Final Results

John Hazen, Managing Director

November 17, 2020

Congratulations Orange County Utilities!

#1 Nationally

Highest Ranked in Customer Satisfaction: South Midsize

J.D. POWER

Orange County Utilities Customer Comments…

"Straight up stand up company. Never have I been given the run around on a billing issue."

"Excellence in every department."

"The information is easily accessible on the website, and when you call their telephone number or email someone, the response is usually prompt."

"A little of everything. Good customer service. Good pricing. Good service of water."

"Easy to work with and good customer service."

J.D. POWER

J.D. POWER

Wave 1
June 2019
- Readout: August 15, 2019

Wave 2
September 2019
- Readout: November 5, 2019

Wave 3
December 2019
- Readout: February 4, 2020

Wave 4
March 2020

Final Results:
Press Release: May 6, 2020

2020 Water Utility Residential Study Overview

32,675
TOTAL RESPONSES NATIONALLY

5 TH
YEAR OF THE STUDY

90 BRANDS
WITH 400,000+ RESIDENTIAL CUSTOMERS

KEY INDEX FACTORS

QUALITY AND RELIABILITY
29%

PRICE
21%

Conservation
16%

BILLING & PAYMENT
14%

COMMUNICATIONS
14%

CUSTOMER SERVICE
6%

WHEN INTERACTION IS PRESENT
27%

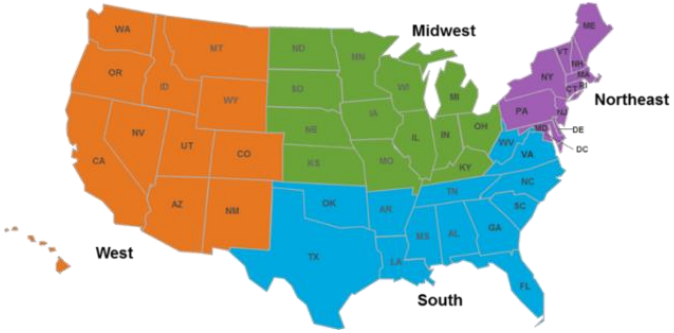
Orange County Utilities sample size:
299 total completes
113 customer service completes

© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

US Water Suppliers – Region/Segment

West

- Large -
California American Water
California Water Service
City of Phoenix
City of San Diego
Denver Water
East Bay Municipal Utility District
Golden State Water Company
L. A. Dept. of Water & Power
Las Vegas Valley Water District
San Jose Water
Seattle Public Utilities
SFPUC
- Midsize -
Board of Water Supply (Honolulu)
City of Fresno
City of Sacramento
Colorado Springs Utilities
Eastern Municipal Water District
Irvine Ranch Water District
Long Beach Water Dept
Mesa Water Resources
Portland Water Bureau
San Gabriel Valley Water Company
Tucson Water
Water Utility Authority (Albuquerque)



Midwest

- Large -	- Midsize -
Citizens Energy Group	Aqua
City of Chicago	City of Minneapolis
City of Cleveland	KC Water
City of Columbus	Metropolitan Utilities District (Omaha)
Detroit Water and Sewerage Dept	Milwaukee Water Works
Greater Cincinnati Water Works	
Illinois American Water	
Indiana American Water	
Louisville Water	
Missouri American Water	

Northeast

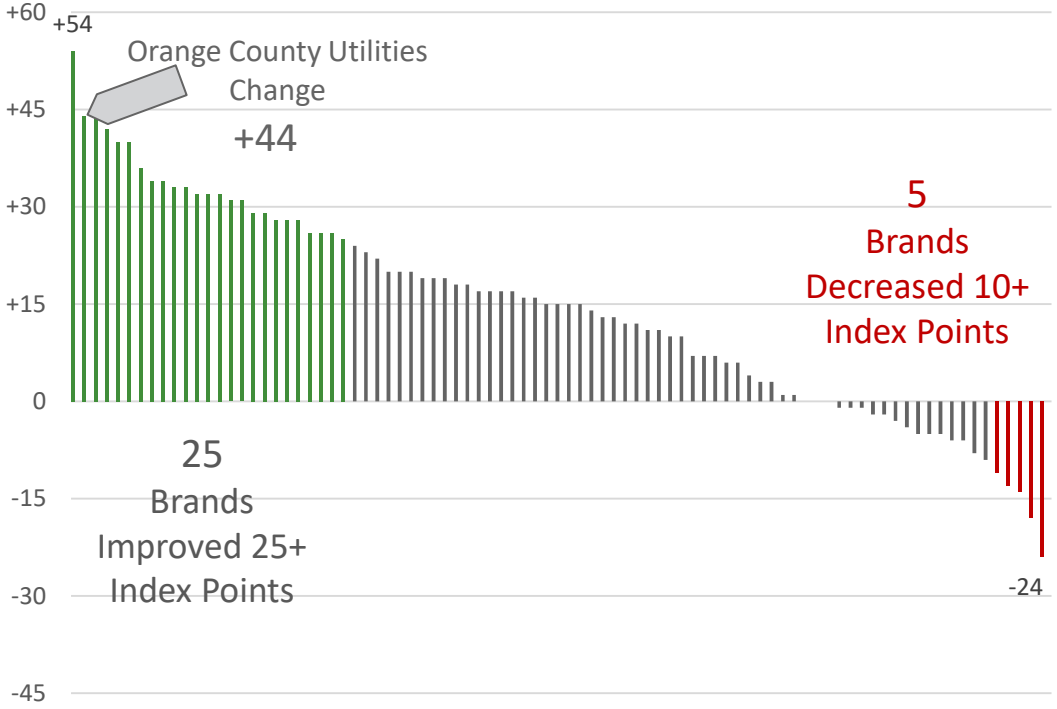
- Large -
Aqua
City of Baltimore
New Jersey American Water
NYC Environmental Protection
Pennsylvania American Water
Philadelphia Water Department
Suez
Suffolk County
WSSC
- Midsize -
Aquarion Water Company
Boston Water and Sewer Commission
DC Water
Erie County Water Authority
Monroe County Water Authority
New York American Water
PGH2O
Regional Water Authority (Connecticut)

South

- Large -	- Midsize -	
Austin Water	Aqua	Fulton County Water & Sewer
Charlotte Water	Baton Rouge Water Company	Hillsborough County
City of Dallas	Birmingham Water Works	Jefferson Parish
City of Fort Worth	City of Atlanta	Manatee County
City of Houston	City of Newport News	**Orange County Utilities**
DeKalb County	City of Oklahoma City	OUC
Fairfax Water	City of Raleigh	Palm Beach County
Gwinnett County	City of Tampa	Pinellas County Utilities
JEA	City of Virginia Beach	Tulsa Water
Metro Water Services (Nashville)	Cobb County Water System	WaterOne
Miami-Dade County	El Paso Water	
MLGW		
San Antonio Water System		

© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

Industry Change in Overall Satisfaction 2019 vs. 2020



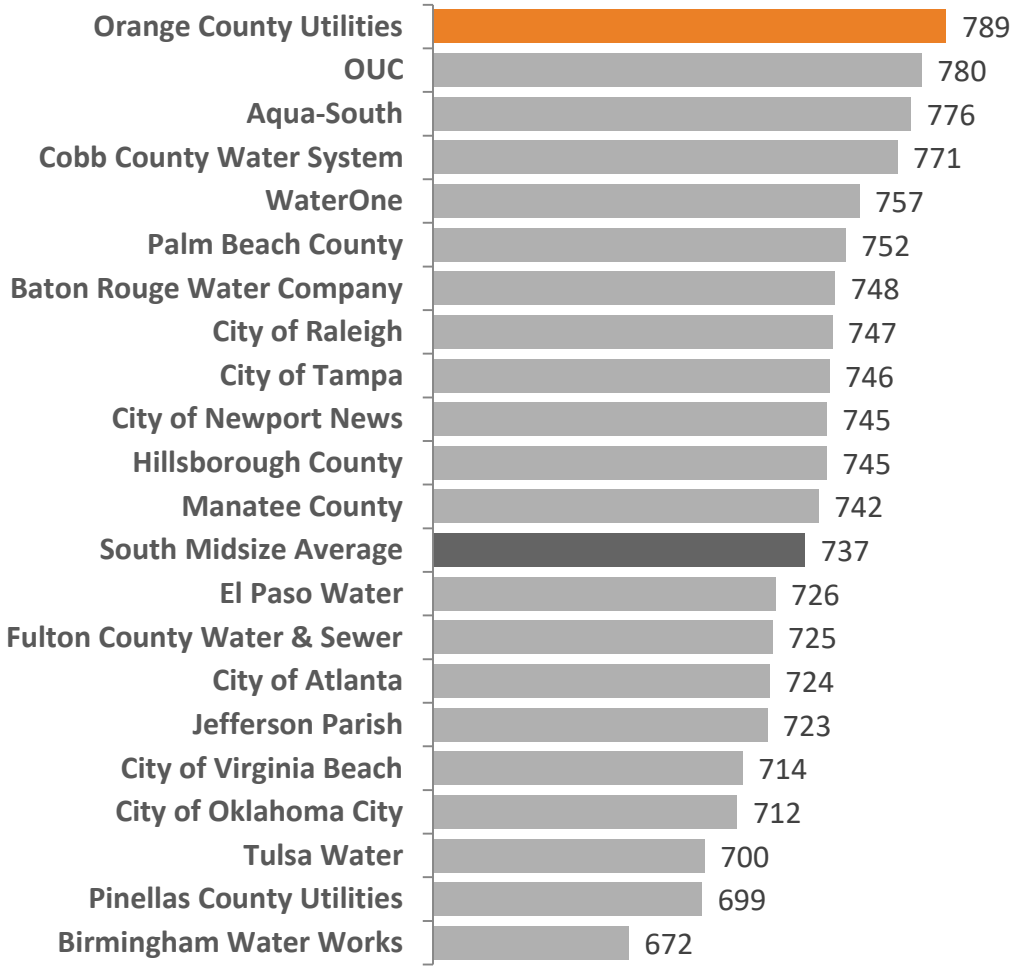
Most Improved Brands

New York American Water	+54
Orange County Utilities	**+44**
Palm Beach County	+44
DC Water	+42
City of Chicago	+40
Seattle Public Utilities	+40
OUC	+36
California American Water	+34
City of Cleveland	+34
DeKalb County	+33
PGH2O	+33

© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

Overall South Midsize Ranking

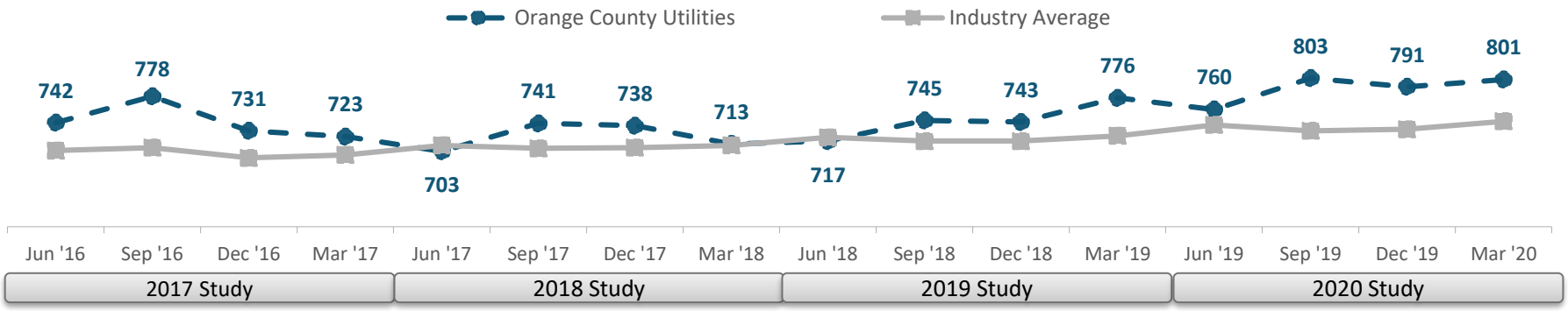
Orange County Utilities ranks 1st in the South Midsize Segment

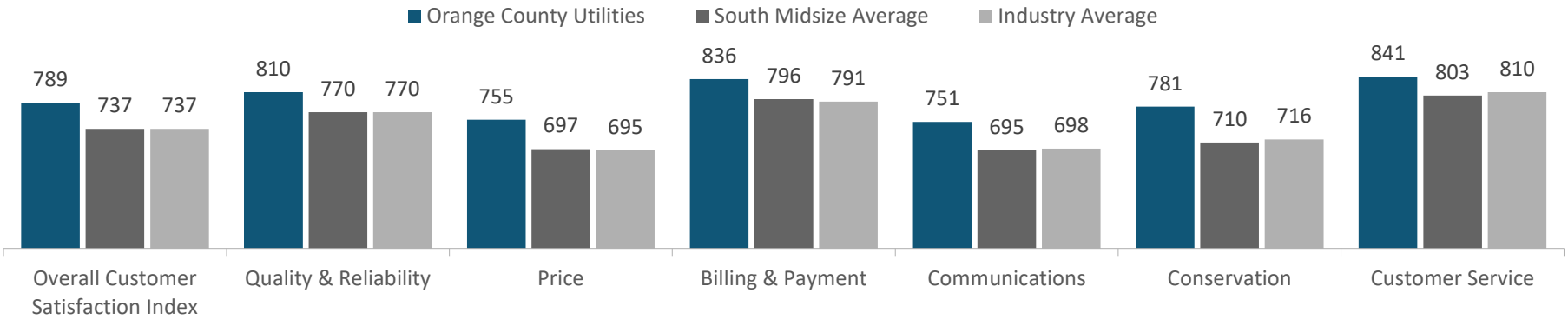


© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

Index and Factors Compared to Industry and Segment

Overall Satisfaction Trend

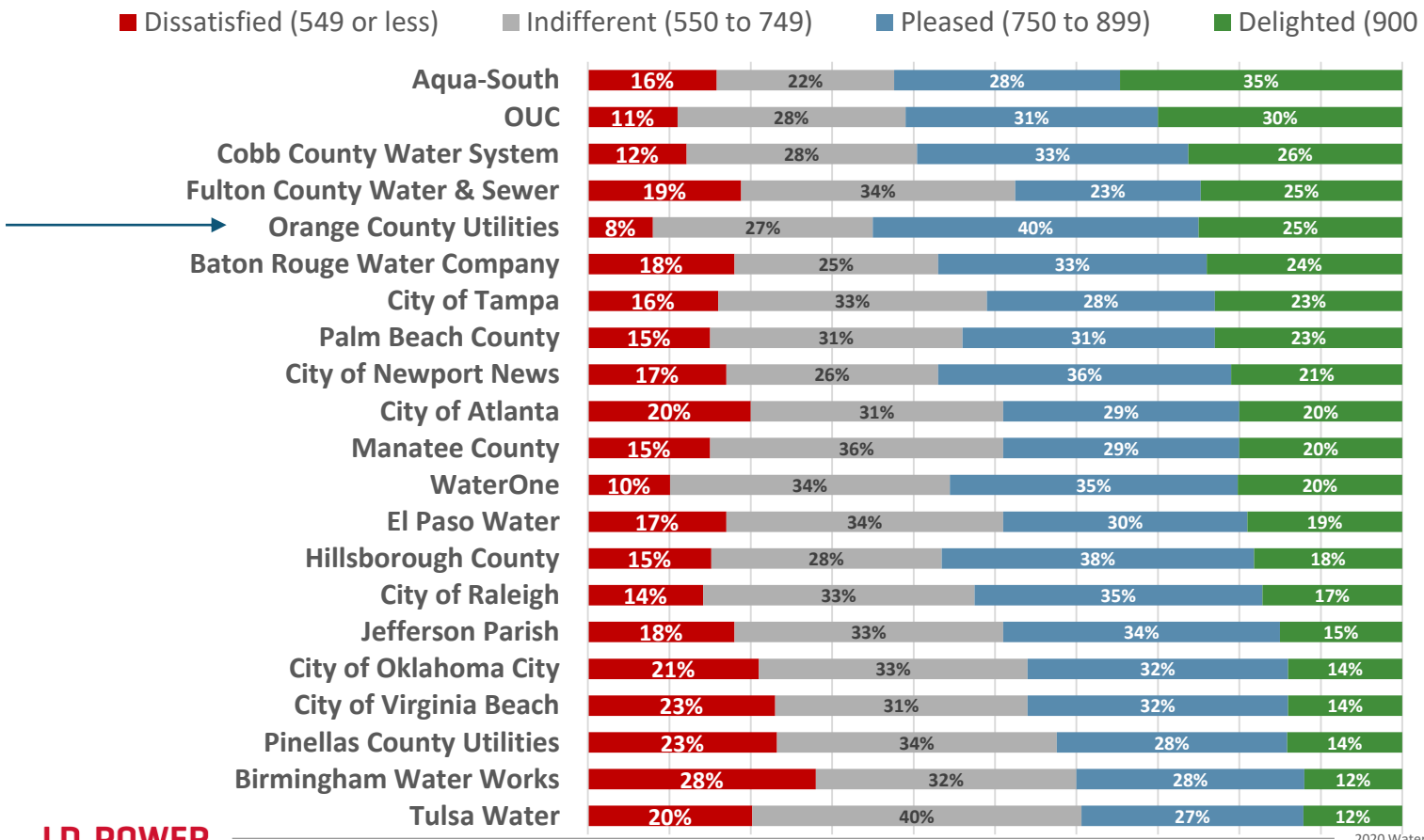




© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

Overall Customer Satisfaction Index - Zones of Satisfaction

Zones of Satisfaction – South Midsize

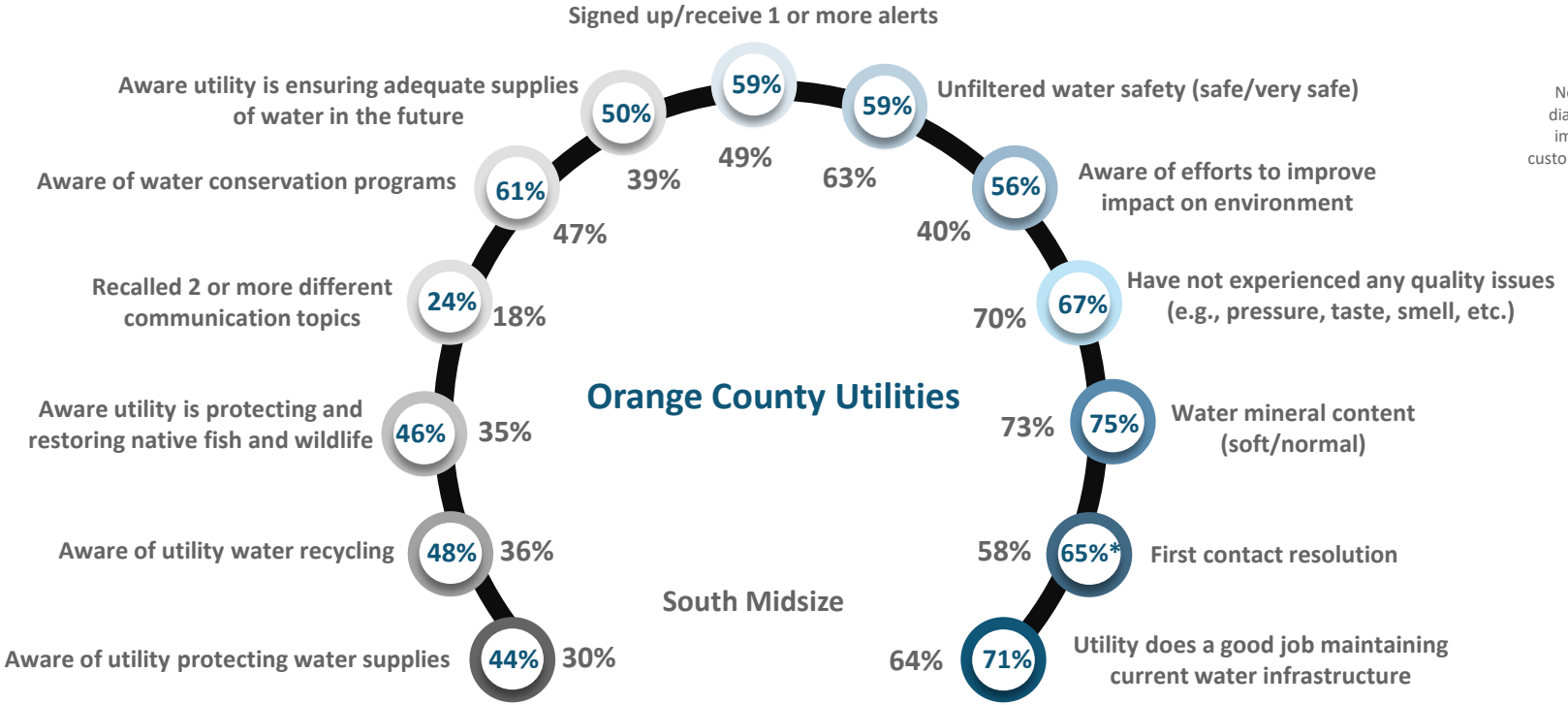


Orange County Utilities has the fewest Dissatisfied Customers at 8%

© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

Key Performance Indicators

These are diagnostics that are the most impactful on overall customer satisfaction

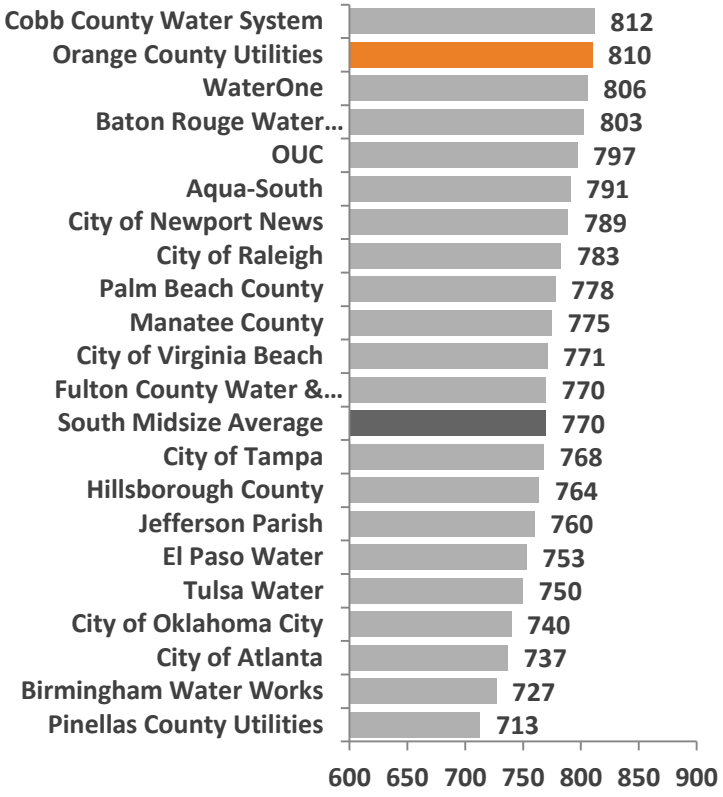


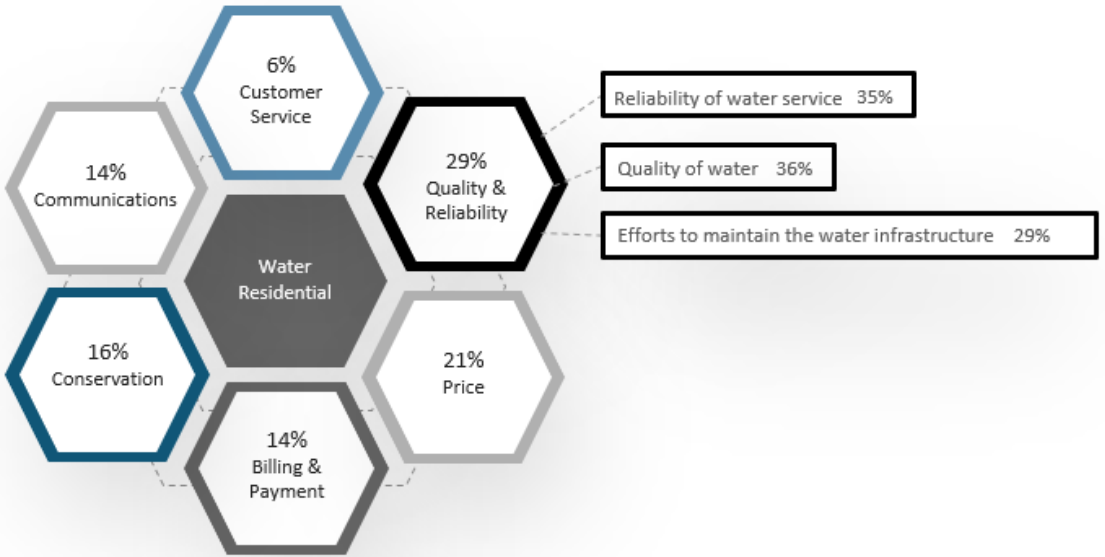
Note: KPIs are diagnostics that impact overall customer satisfaction the most.

© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

Quality & Reliability

South Midsize Quality & Reliability Ranking





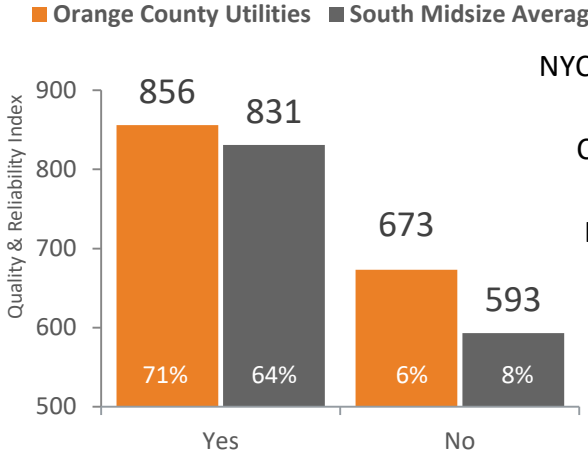
© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

Infrastructure

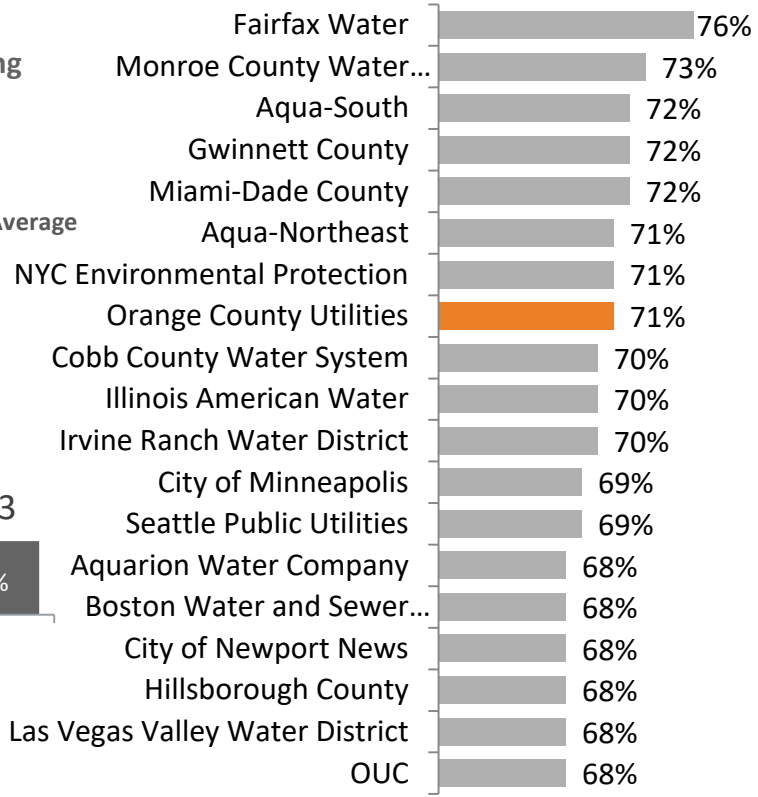
Maintaining Infrastructure is Important to Customers

Customers who say their utility does a good job of maintaining the current infrastructure or are aware of utility efforts to maintain the current infrastructure have significantly higher satisfaction

Utility does a Good Job of Maintaining Current Infrastructure



Top Brands – Utility Does Good Job Maintaining Infrastructure

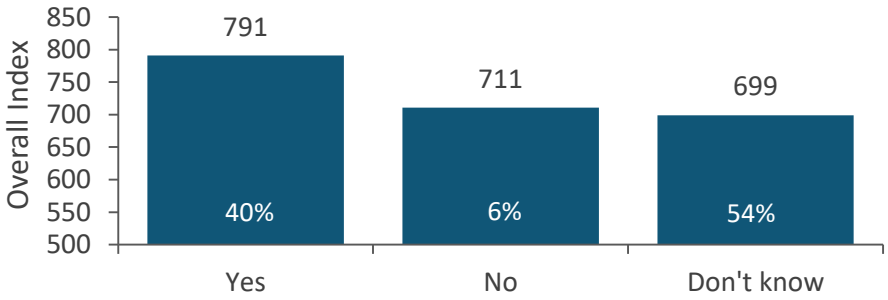


© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

Water Quality Report Overview

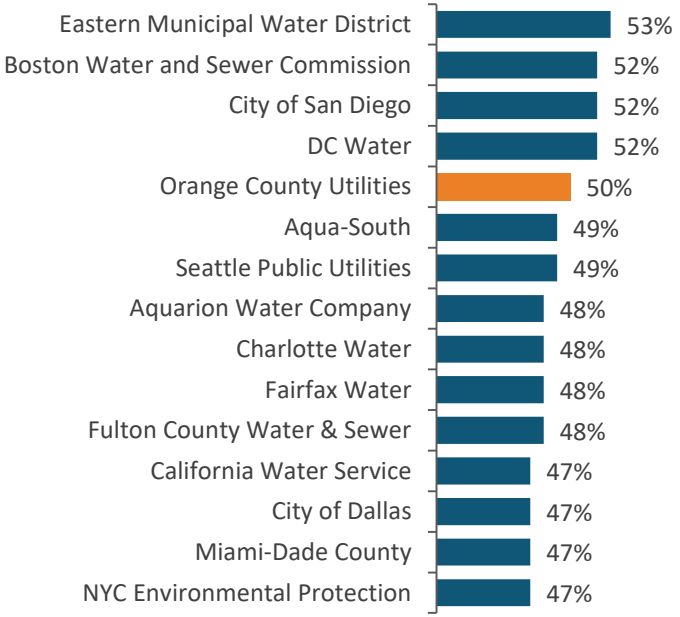
Customers who are aware of their utility's water quality report have a better perception and understanding of their local drinking water and water infrastructure

Aware of Water Quality Report



Aware of Water Quality Report	Yes	No	Diff.
Unfiltered water is safe/very safe	68%	54%	+14%
"Always" drink tap water	39%	28%	+11%
Utility maintains current infrastructure (% yes)	76%	54%	+22%
Know where drinking water comes from	74%	64%	+10%

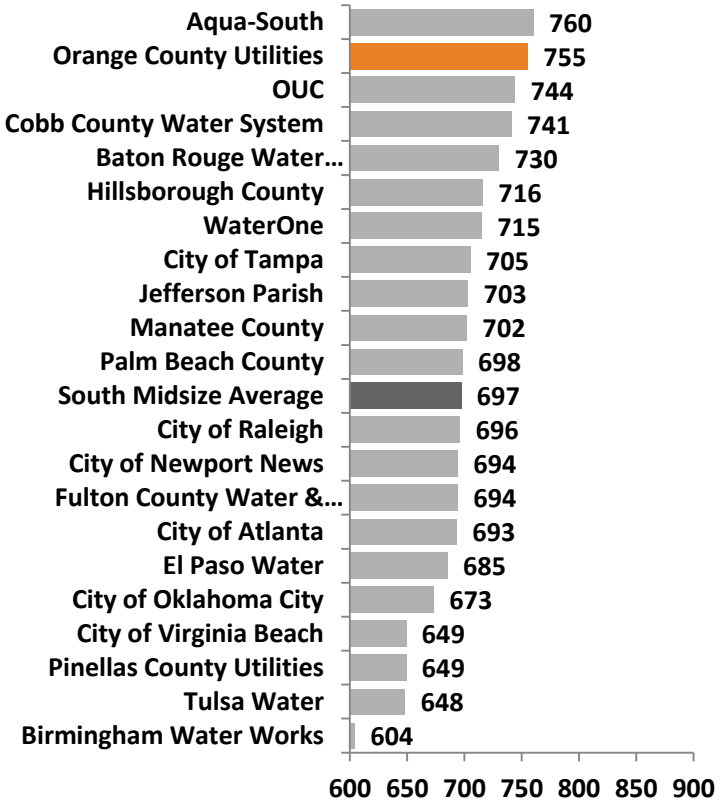
Top Brand Aware of Water Quality Report



© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

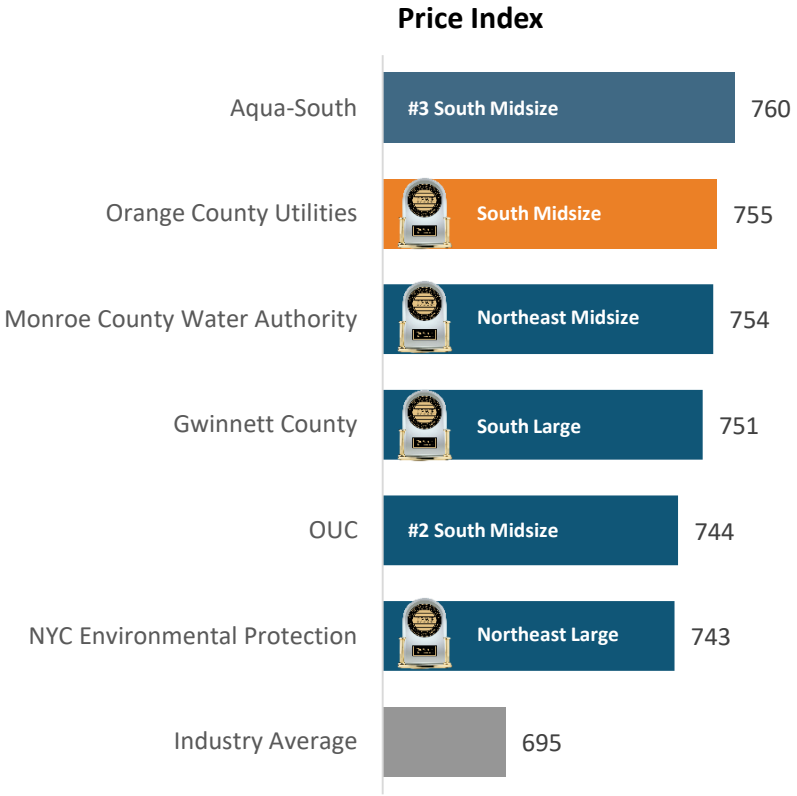
Price

South Midsize Price Ranking



© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

Price - Top Performers



Ease of Understanding Pricing

Orange County Utilities	**7.78**
Aqua-South	**7.75**
Gwinnett County	7.71
OUC	7.66
Illinois American Water	7.63

Fairness of Pricing

Aqua-South	**7.51**
Monroe County Water Authority	7.48
Gwinnett County	7.44
Orange County Utilities	**7.44**
NYC Environmental Protection	7.40

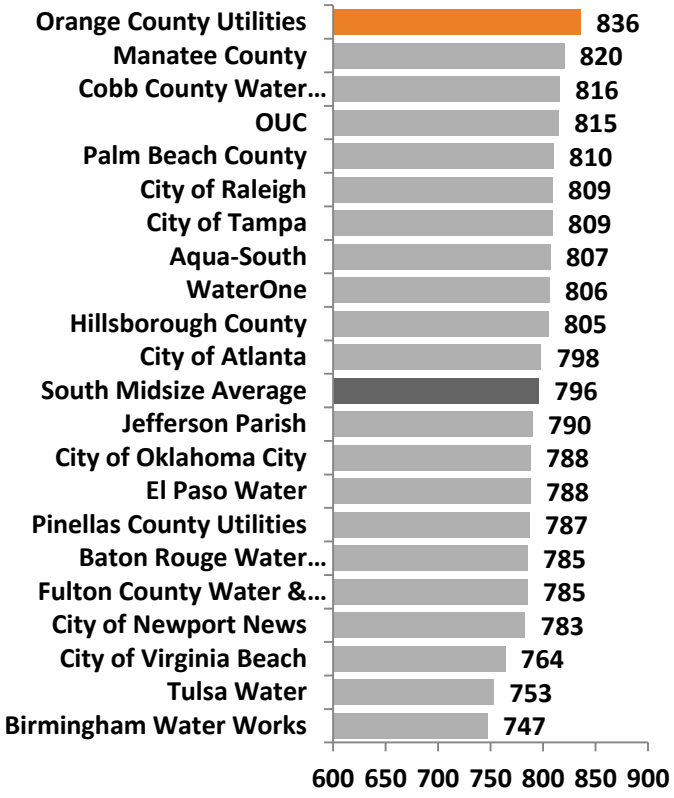
Total Cost of Water Service

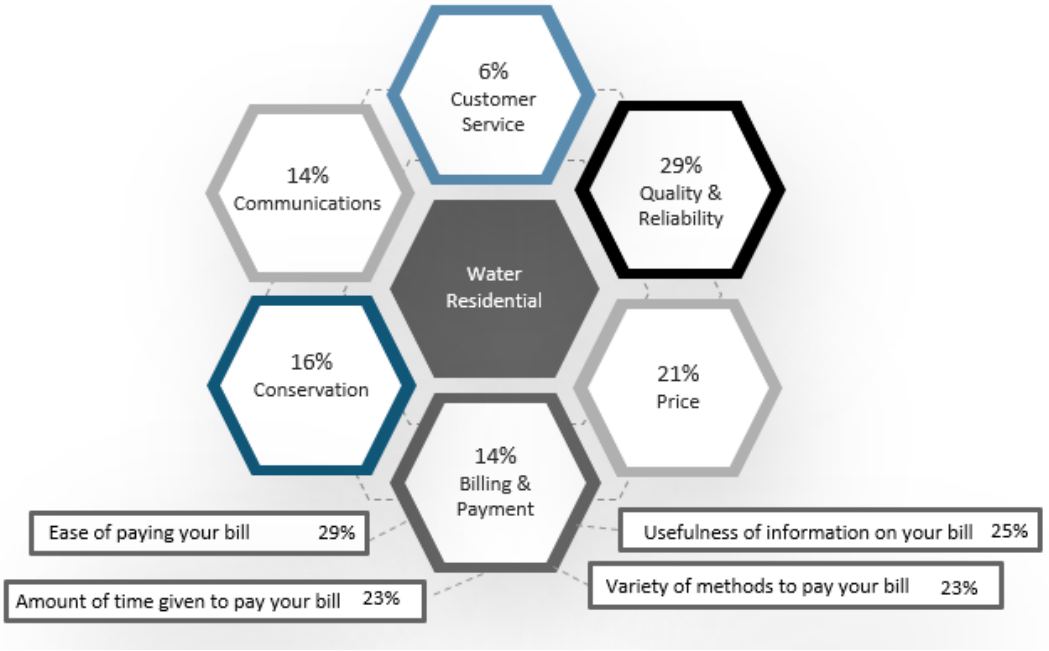
Aqua-South	**7.59**
Monroe County Water Authority	7.54
Orange County Utilities	**7.48**
Gwinnett County	7.42
OUC	7.42

© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

Billing & Payment

South Midsize Billing Ranking

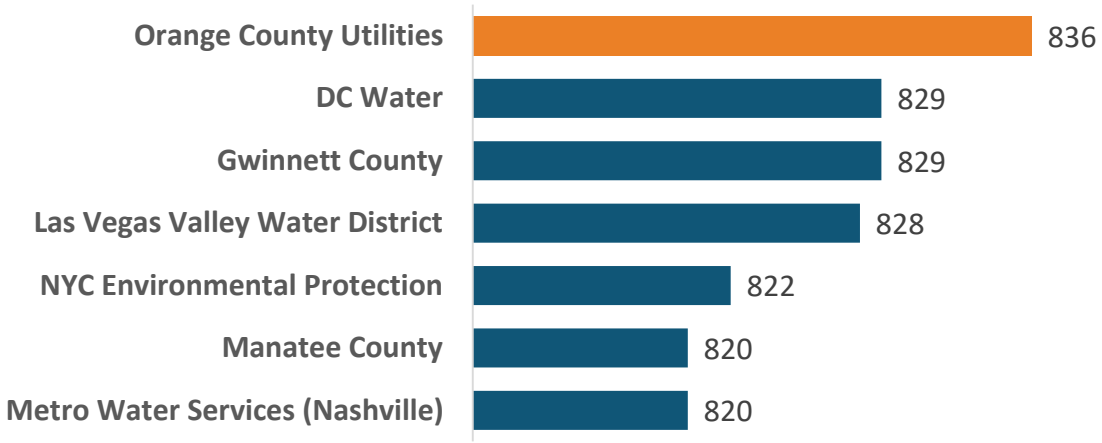




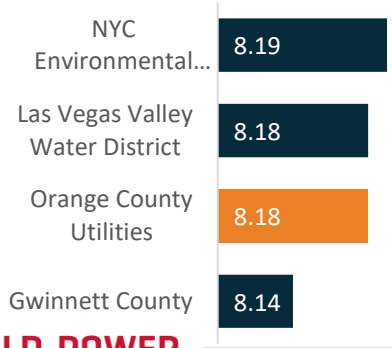
© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

Billing & Payment Top Performers

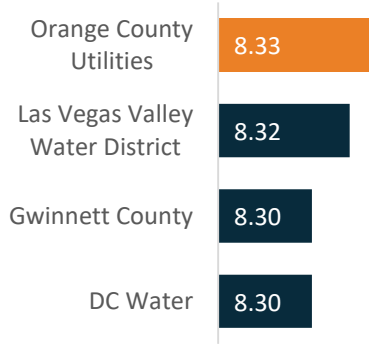
Billing & Payment Index



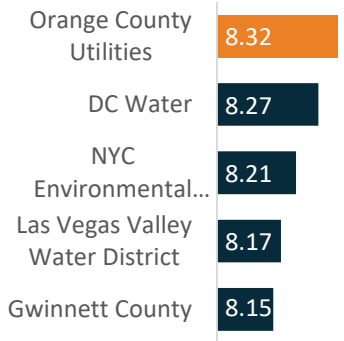
Usefulness of information on bill



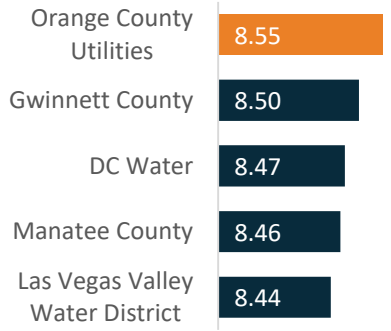
Variety of methods to pay bill



Amount of time given to pay bill



Ease of paying your bill

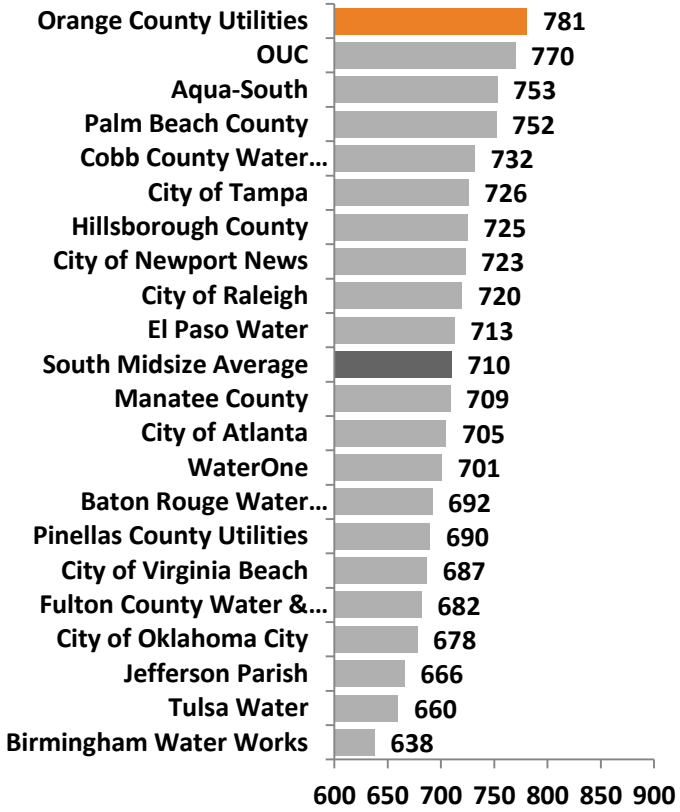


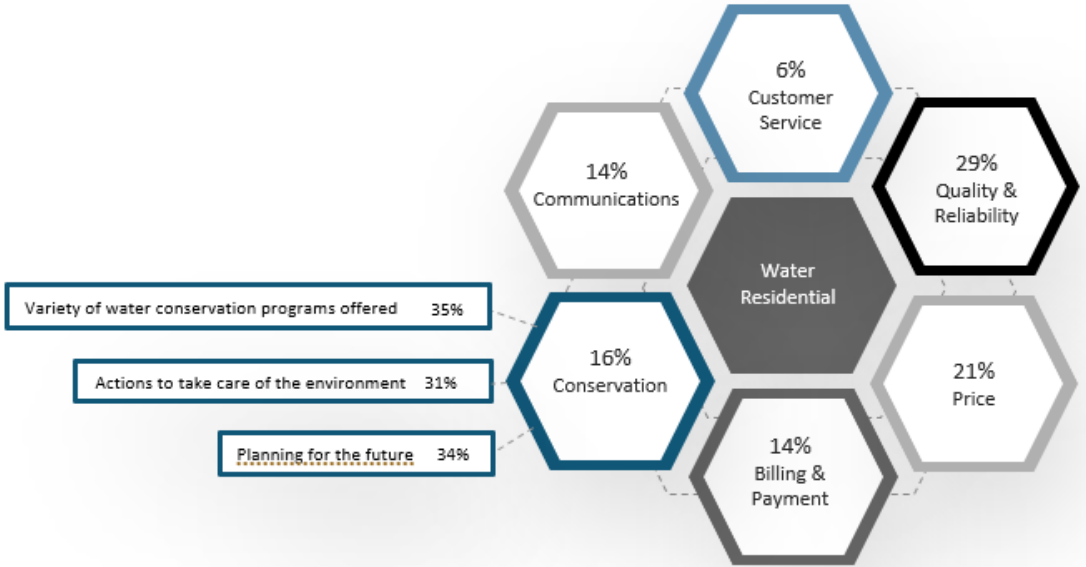
J.D. POWER

© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

Conservation

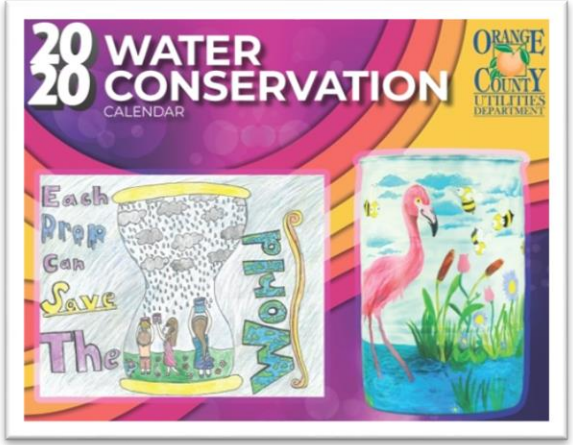
South Midsize Conservation Ranking

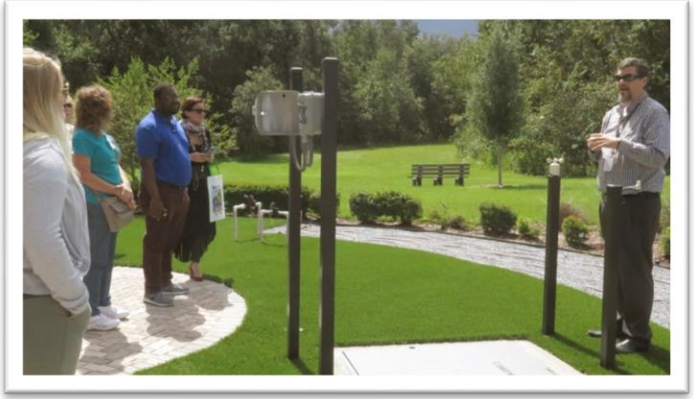




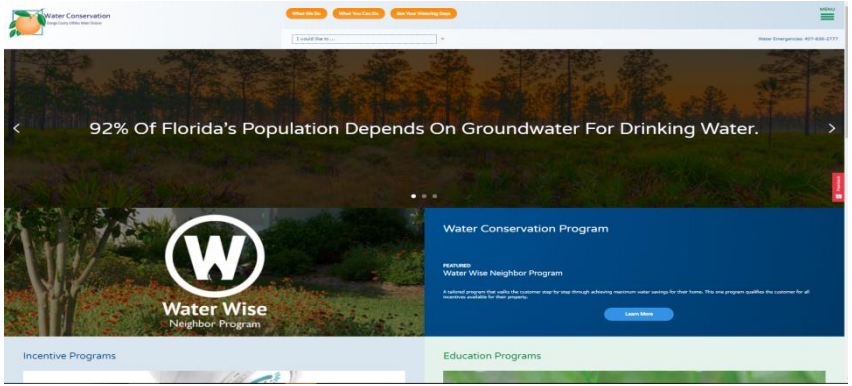
© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

Orange County Utilities - #1 variety of water conservation programs offered





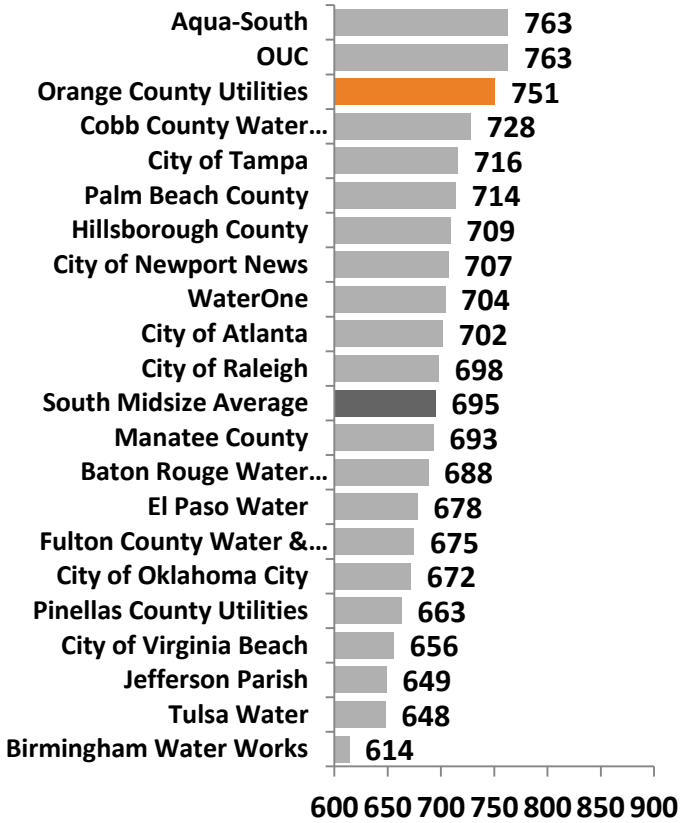
www.occonservewater.net

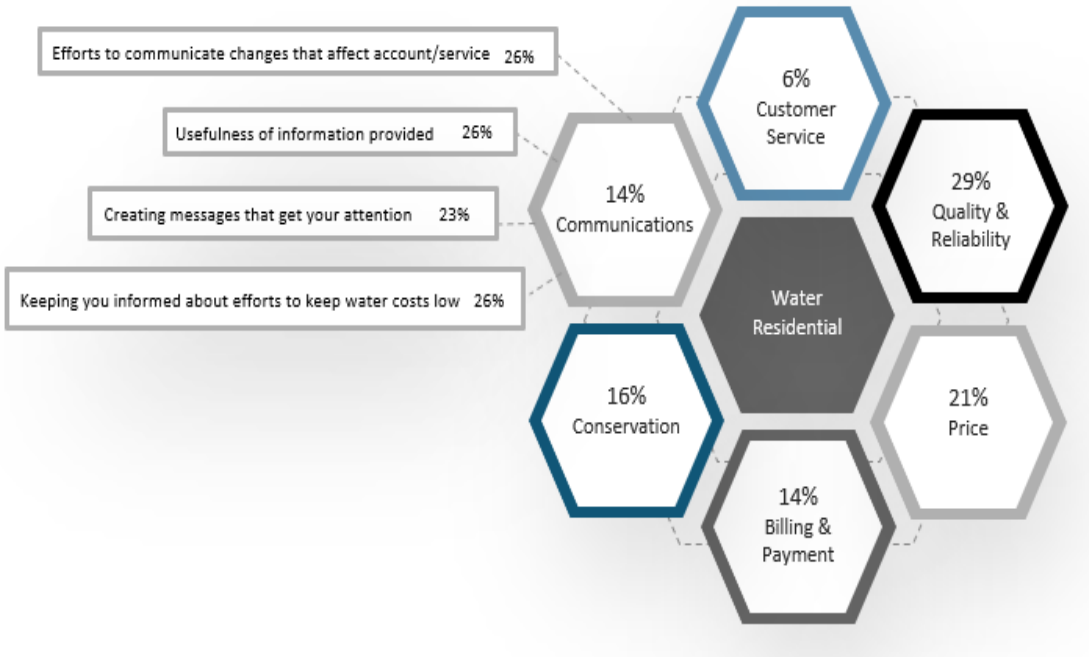


© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

Communications

South Midsize Communications Ranking

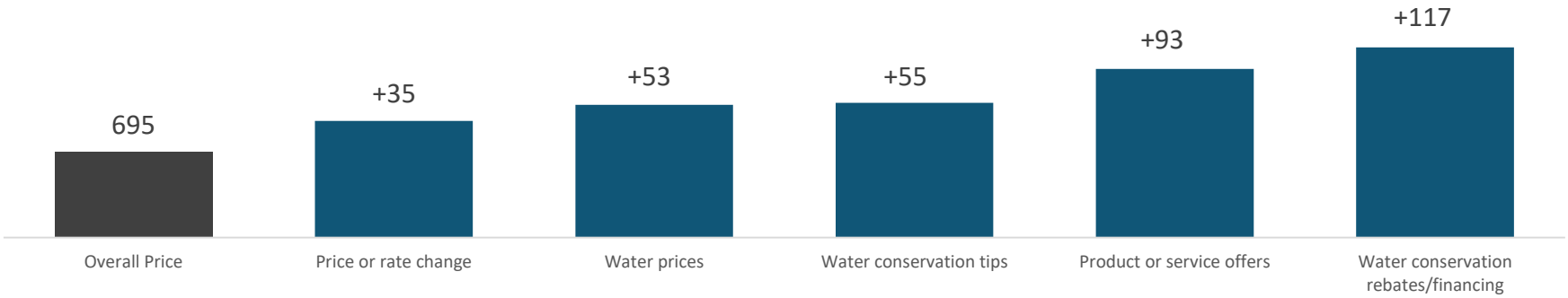




© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

Communications Impact on Price Satisfaction

Communication Topic Impact on Price Satisfaction



Efforts to communicate changes that affect account/service

Aqua-South	**7.69**
OUC	7.68
Orange County Utilities	**7.60**
NYC Environmental Protection	7.48
Cobb County Water System	7.47

Keeping you informed about efforts to keep water costs low

Aqua-South	**7.61**
OUC	7.52
Orange County Utilities	**7.44**
NYC Environmental Protection	7.41
Miami-Dade County	7.38

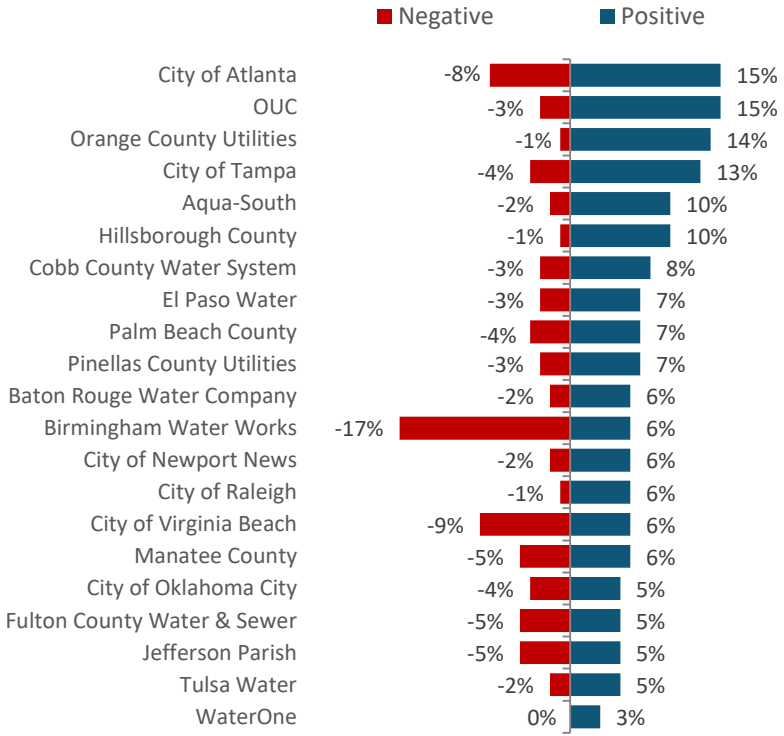
Variety of water conservation programs offered

Orange County Utilities	**7.74**
NYC Environmental Protection	7.69
OUC	7.62
Las Vegas Valley Water District	7.60
Miami-Dade County	7.55

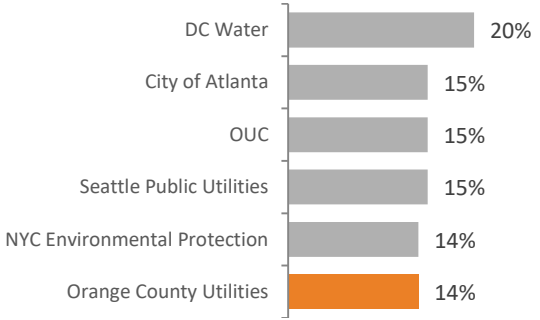
© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

Impact of Media News Stories

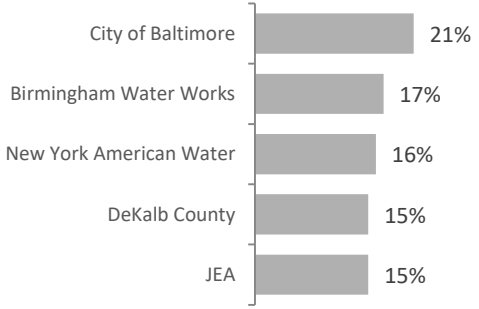
Most customers do not hear about their water utility in the media. But when they do, the media is more impactful than messages received directly from their utility



Top Positive News Brands



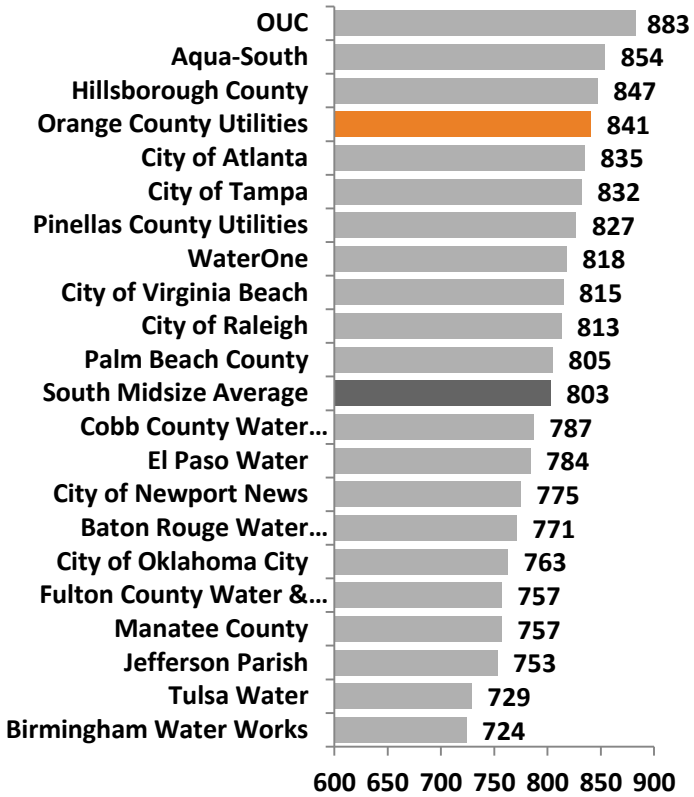
Most Negative News Brands



© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

Customer Service

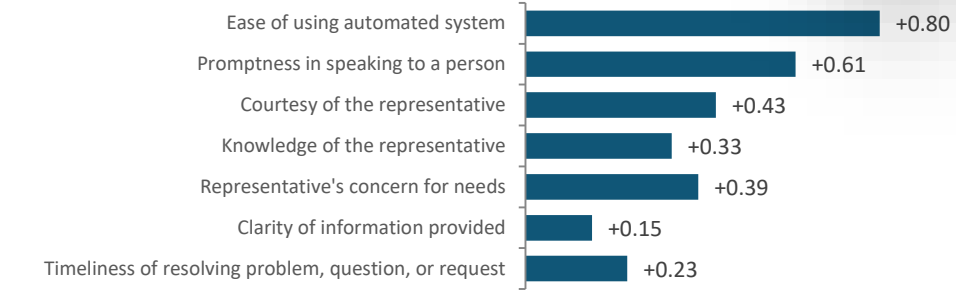
South Midsize Customer Service Ranking



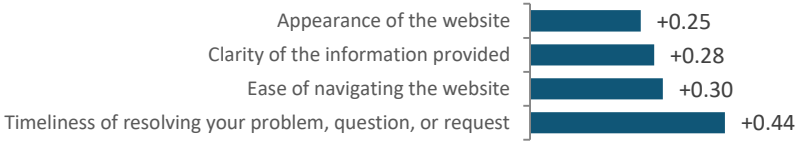
Attribute Gap to South Midsize

6% Customer Service

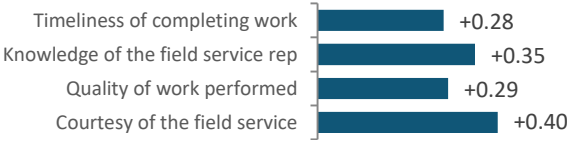
Phone – 44%



Online – 40%



In Person/Field Service – 16%



© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

Customer Service Metric Overview

Industry Ranks and Quartiles – Orange County Utilities

Phone		**823** Rank 24 of 90 2 Quartile
Online		**859** Rank 10 of 90 1 Quartile
In person /field		**859** Rank 18 of 90 1 Quartile

Customer Service Metrics	Orange County Utilities	South Midsize	Industry
First contact phone %	64%	68%	67%
First contact online %	77%	70%	69%
First contact assisted online %	68%	63%	62%
Addressed by name	82%	70%	68%
Thanked for being customer	80%	74%	74%
Rep had all account info available	87%	79%	77%
Placed on hold	49%	73%	70%
Experienced website/app issues	38%	25%	30%

© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

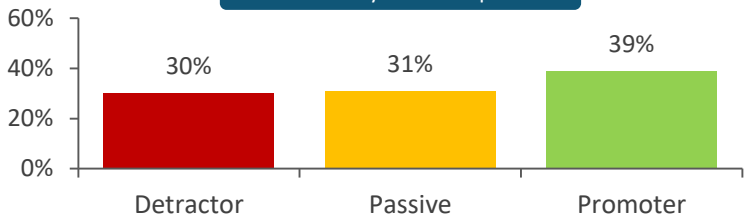
How to Use NPS (Net Promoter Score)

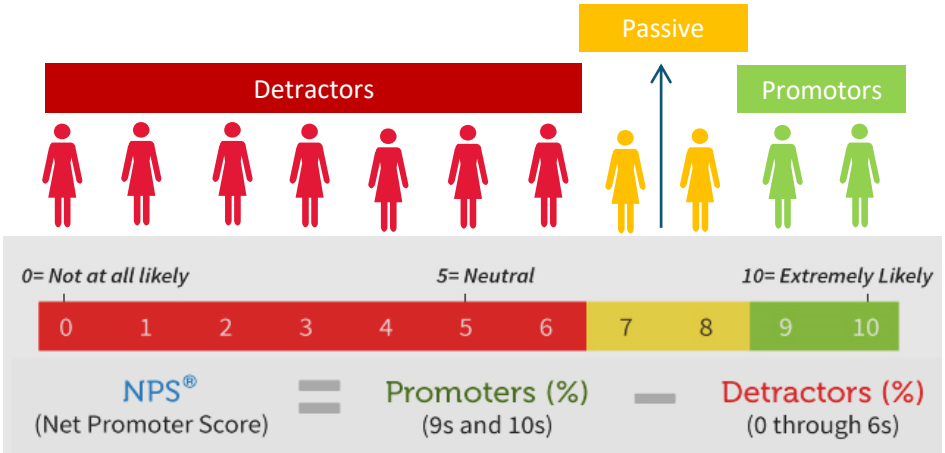
"How likely are you to recommend your utility to a friend, relative or colleague?"

Industry Top NPS Scores

Gwinnett County	33
Monroe County Water Authority	32
Miami-Dade County	28
OUC	28
Orange County Utilities	27
Palm Beach County	27
Baton Rouge Water Company	26
City of Tampa	22
City of Dallas	21
Illinois American Water	21
Jefferson Parish	21
Las Vegas Valley Water District	21
Louisville Water	21
Overall Industry	8

Industry NPS Groups





NPS Score
Top of mind – Brand Reputation
(Quick measure of the health of your brand)

Overall Satisfaction Index Score
After detailed thought of utility
(Customer satisfaction performance)

Net Promoter System®, Net Promoter Score®, NPS® and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., Fred Reichheld and Satmetrix Systems, Inc.

© 2020 J.D. Power. All Rights Reserved. CONFIDENTIAL AND PROPRIETARY—For Internal Use.

Keys to Improving Customer Satisfaction

Don't Fight the Results

Hold Teams/People Accountable

Dig Deep into the Details

Learn/Borrow from Others

Have Public Satisfaction Goals

Create a Culture Focused on Customers

Communication is Critical Both with Customers but also Employees

J.D. POWER

Congratulations Orange County Utilities!

#1 Nationally

Highest Ranked in Customer Satisfaction: South Midsize

J.D. POWER

J.D. POWER

Thank You!

© 2020 J.D. Power. All Rights Reserved.