



J.D. POWER

2017

Water Utility Residential Customer Satisfaction StudySM

Orange County Utilities Final Results

John Hazen, Senior Director, Utility Practice

October 17, 2017

What do Top-Performing Companies look like across ALL industries?

1. **Adopt a culture that puts Employees and Customers first**
2. **Establish a Voice of Customer (VOC) vision, core values, and a brand promise**
3. **Clearly define the Customer Experience**
4. **Align the organization around the Customer Experience**
5. **Imbed a philosophy of Employee Empowerment**
6. **Evaluate performance for Continuous Improvement**
7. **Focus on Simplicity and Transparency**



Top companies apply all of these characteristics to Key Touch Points and “Moments of Truth” across the entire customer experience.

2017 Water Residential Study Overview

>40K

Respondents



Online Interviews: 4 quarterly fielding period

- Wave 1: June 2016
 - Wave 2: September 2016
 - Wave 3: December 2016
 - Wave 4: March 2017
- Annual score is the average of the four quarterly fielding periods
 - Ratings on a 1-10 scale
 - Customer Satisfaction Index (CSI) scores on a maximum 1,000 point scale



87

Water Utilities



New
Quarterly Fielding



Four regional segments

- 326 OCU Customer Responses
- 4 Regions:
 - Midwest
 - Northeast
 - South
 - West

Published:

May 16, 2017



Press Release:

May 17, 2017

2nd
Year of the Study



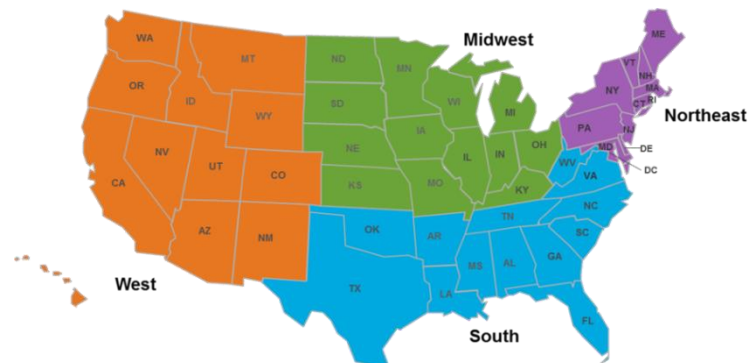
U.S. Water Suppliers – Four Regions

West

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

Midwest

Aqua-Midwest	Indiana American Water
Citizens Energy Group	KC Water Services
City of Chicago	Louisville Water
City of Cleveland	Metropolitan Utilities District (Omaha)
City of Columbus	Milwaukee Water Works
Detroit Water and Sewerage Dept	Missouri American Water
Greater Cincinnati Water Works	Saint Paul Regional Water Services
Illinois American Water	



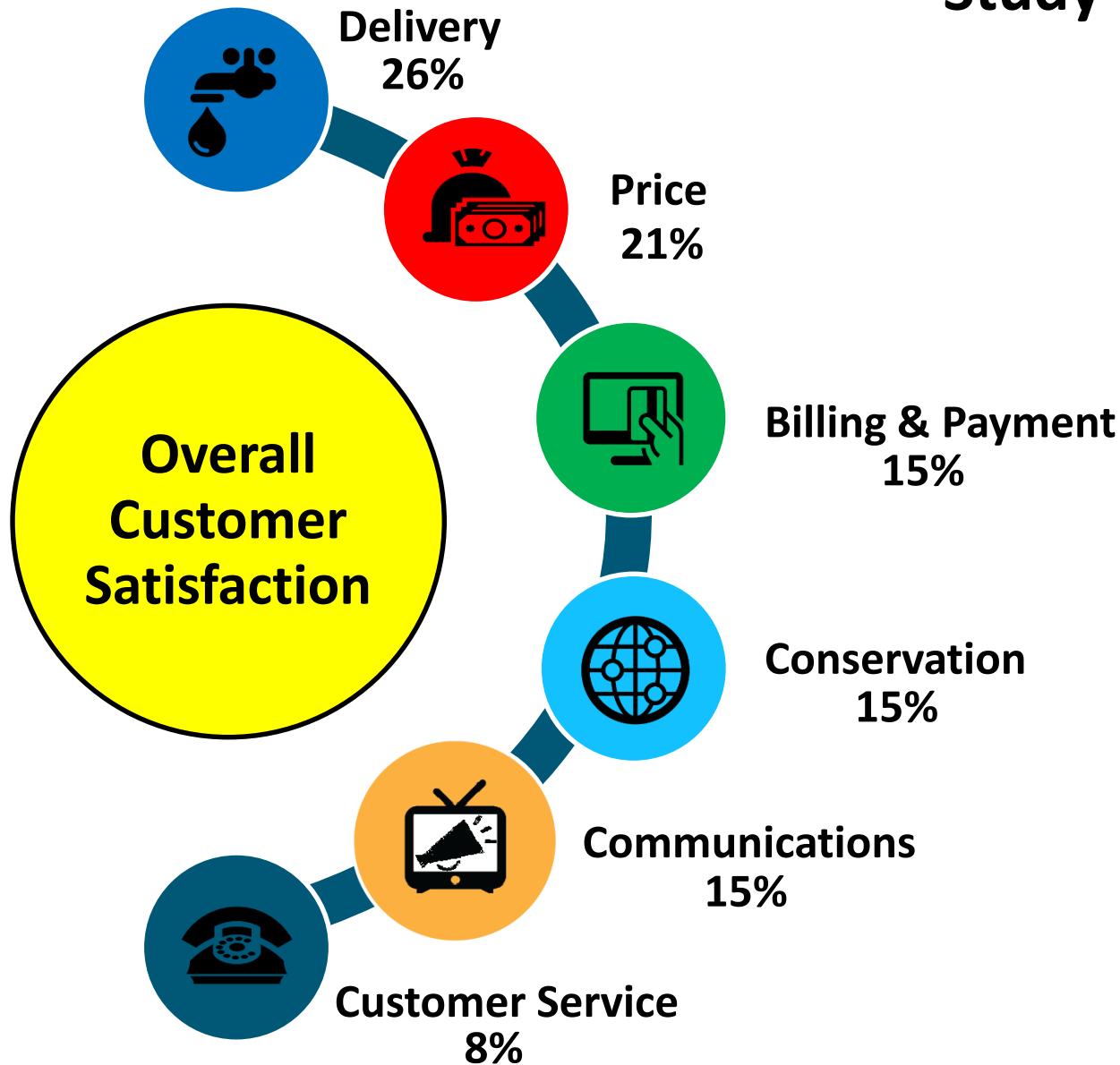
Northeast

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

South

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

Study Factors/Weighting



National Key Findings

34%
**Recall a Water
Utility
Communication**

**22% of
Residential
Customers had a
Service
Interruption**

**eBill is 37
Index Points
More Satisfying
than Paper Bill**

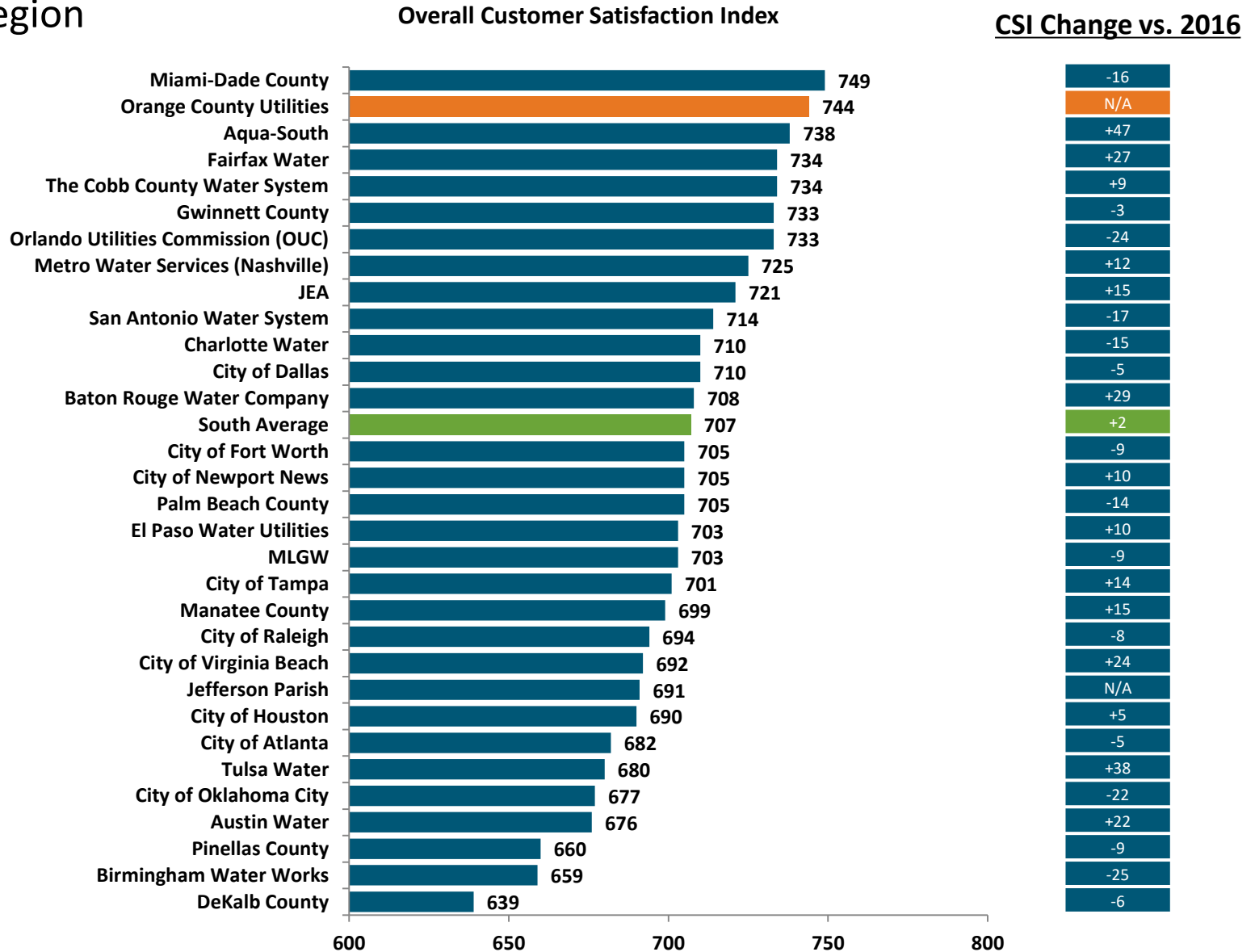
64%
**First Call
Resolution**

***'Onsite Water
Audit'* is the
highest rated
service (9.07)**

28%
**Unaware of
Water Price**

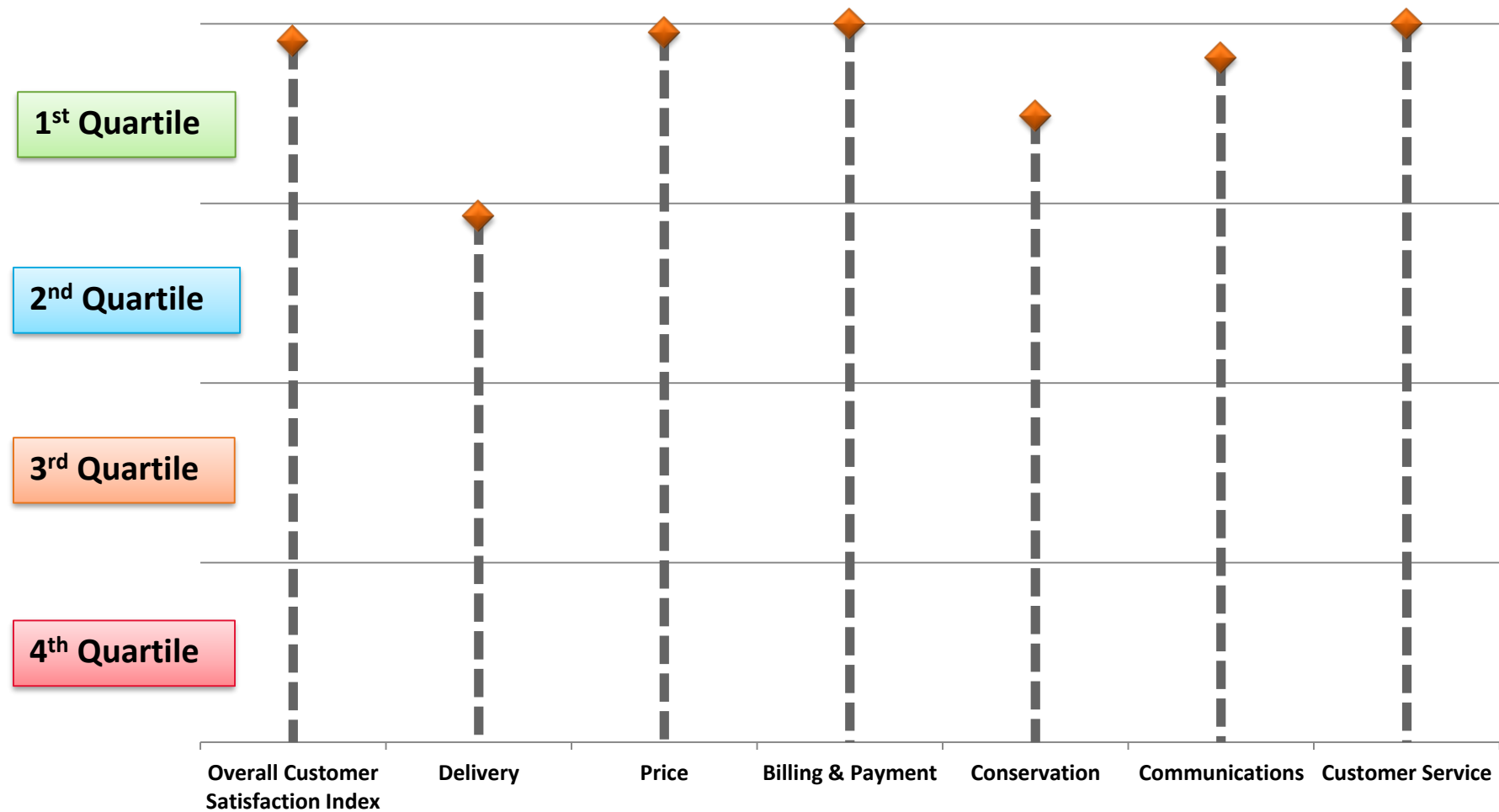
2017 Overall CSI

South Region

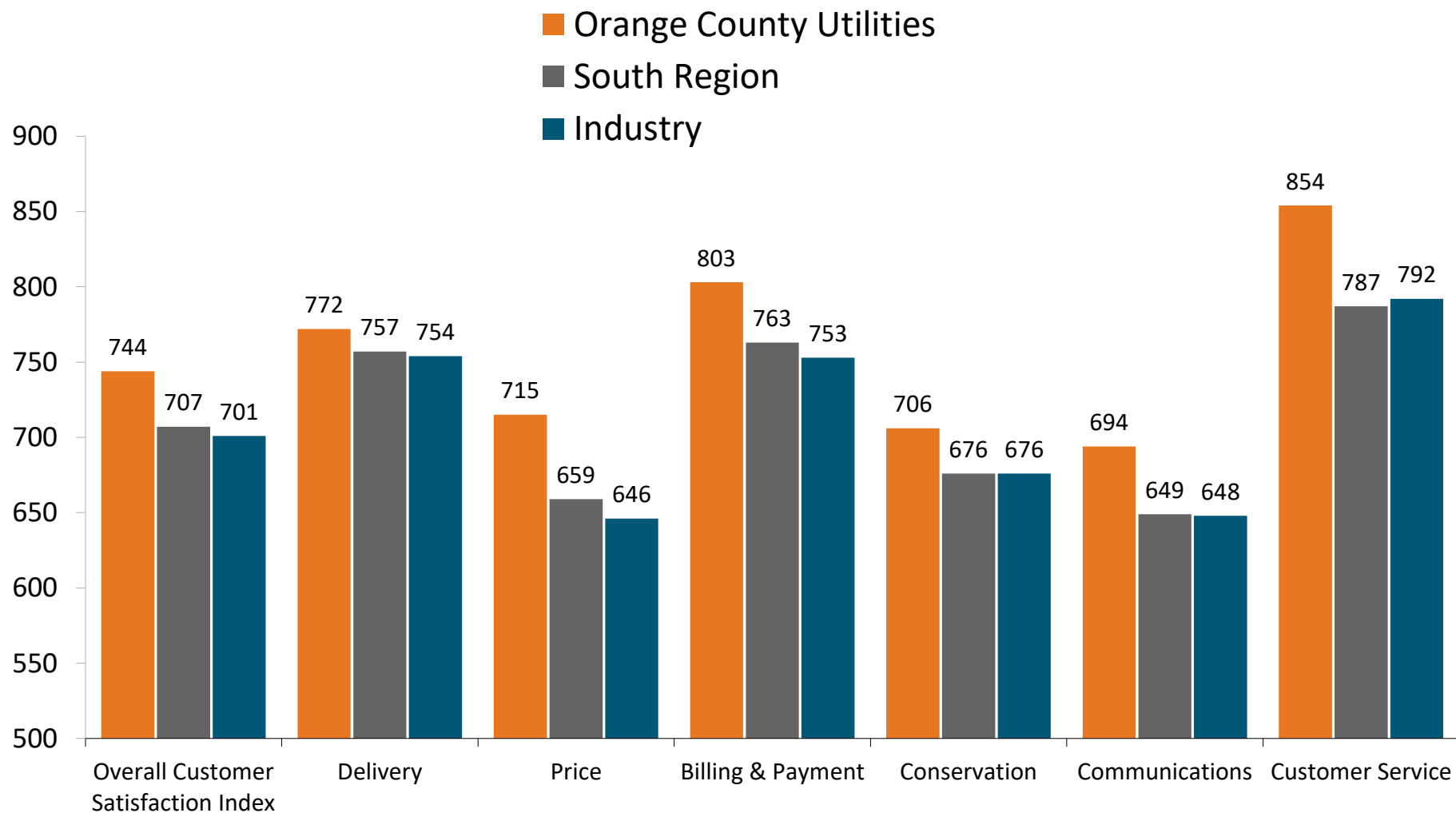


2017 Water Residential Percentile

Orange County Utilities

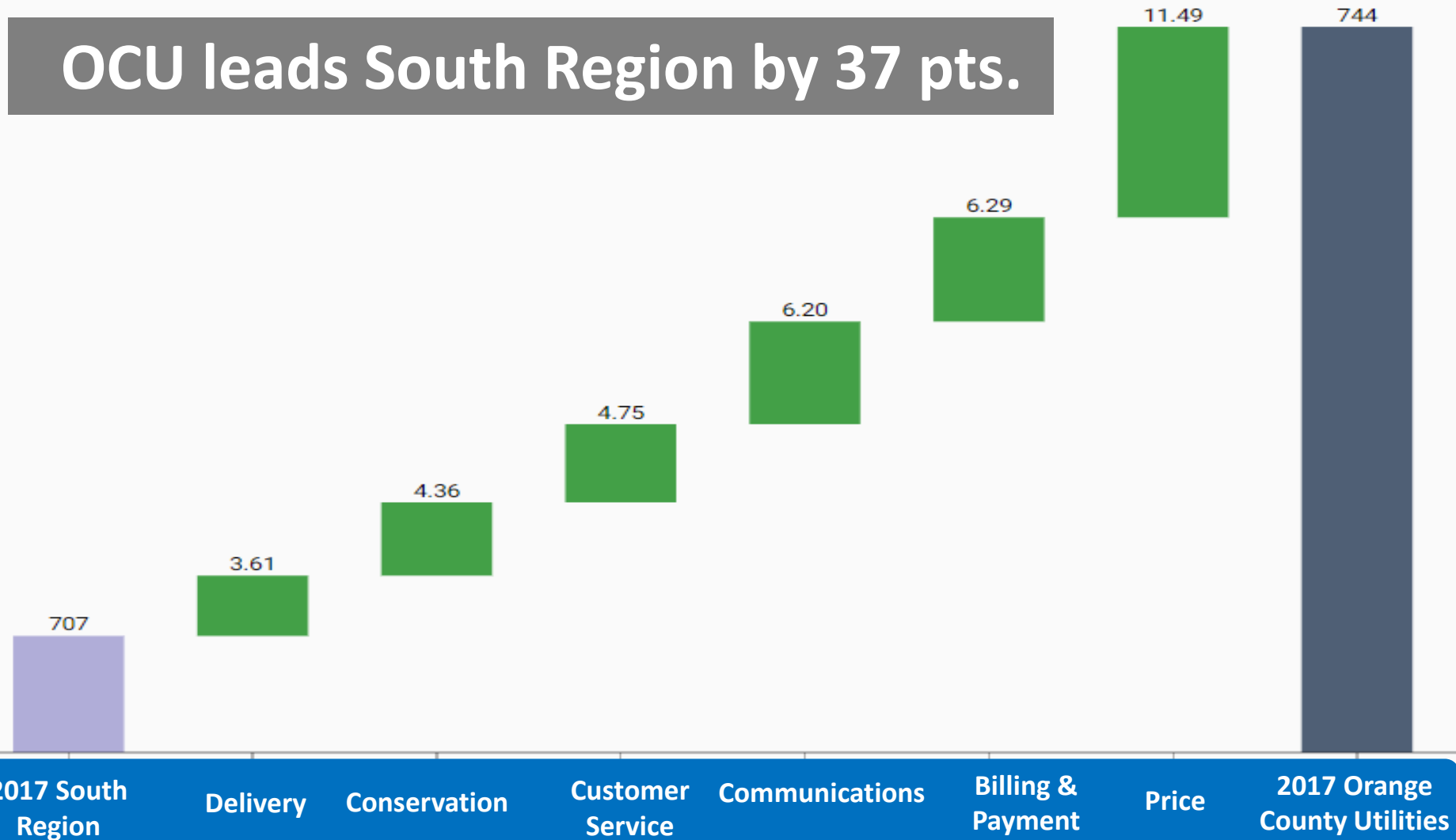


Overall Satisfaction Index Trend

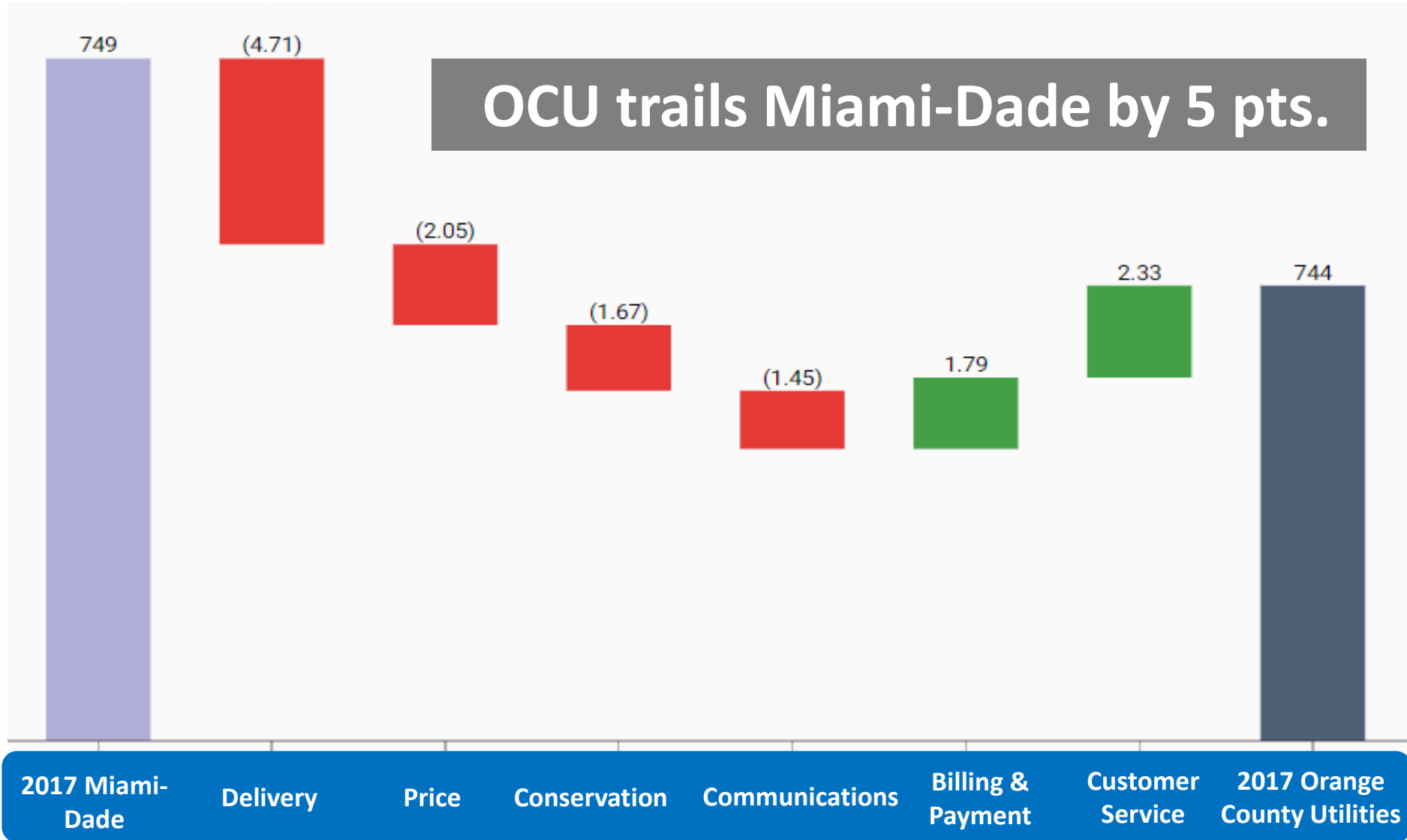


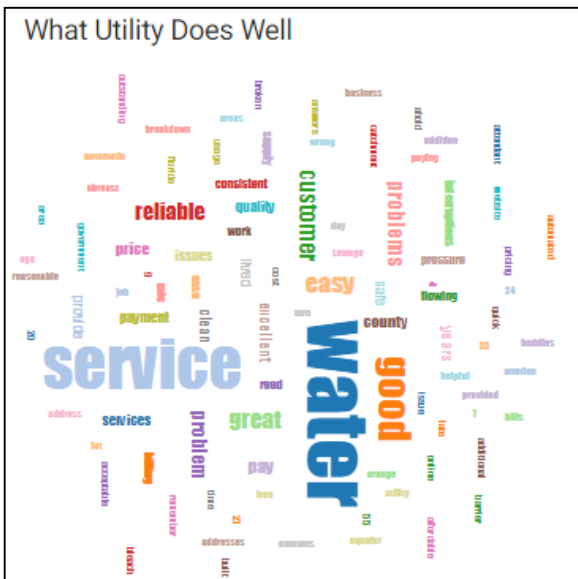
South Region Factor Gap to Orange County Utilities

OCU leads South Region by 37 pts.



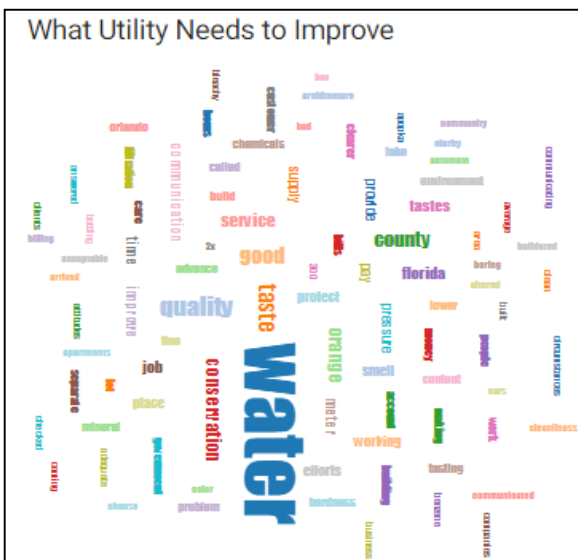
Miami-Dade Overall Factor Gap to Orange County Utilities





"I think their customer service is top notch. I usually get all my answers quickly, unlike other utility companies in my area."

“The price is great, as well as the service. They notify you repeatedly if your payment is due. I can’t remember ever having an issue with our water in the 27 years we’ve lived at this address. Very reliable.”



“They keep the water flowing and I can’t remember a time when there was a problem with service.”

“Great all around customer service.”

“When bills are send via email, include the amount and due date of the bill instead of forcing me to login to my account to get these items.”

“Reduce hardness of water supply so we do not have water spots on cars, windows and dishes.”



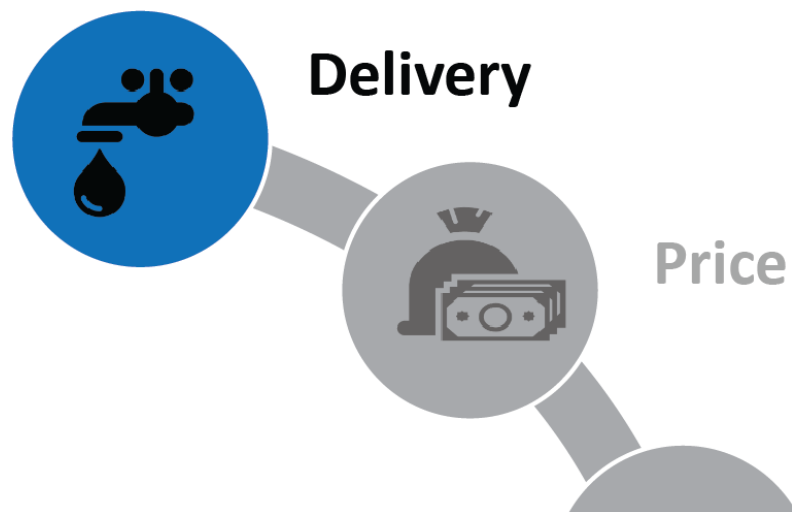
Delivery

Factor Performance - Delivery

Delivery	
Baton Rouge Water Company	811
Fairfax Water	805
The Cobb County Water System	794
Gwinnett County	793
Miami-Dade County	789
City of Newport News	777
MLGW	775
Orange County Utilities	772
City of Virginia Beach	768
Metro Water Services (Nashville)	767
Orlando Utilities Commission (OUC)	767
Aqua-South	763
City of Raleigh	762
Jefferson Parish	762
City of Fort Worth	761
San Antonio Water System	760
Charlotte Water	757
Manatee County	757
Palm Beach County	757
South Region Average	757
City of Dallas	756
El Paso Water Utilities	752
JEA	743
Tulsa Water	740
Birmingham Water Works	736
Austin Water	735
City of Oklahoma City	731
City of Atlanta	729
City of Tampa	726
City of Houston	721
Pinellas County	702
DeKalb County	693

8 of 31 - South

26 of 87 – U.S.



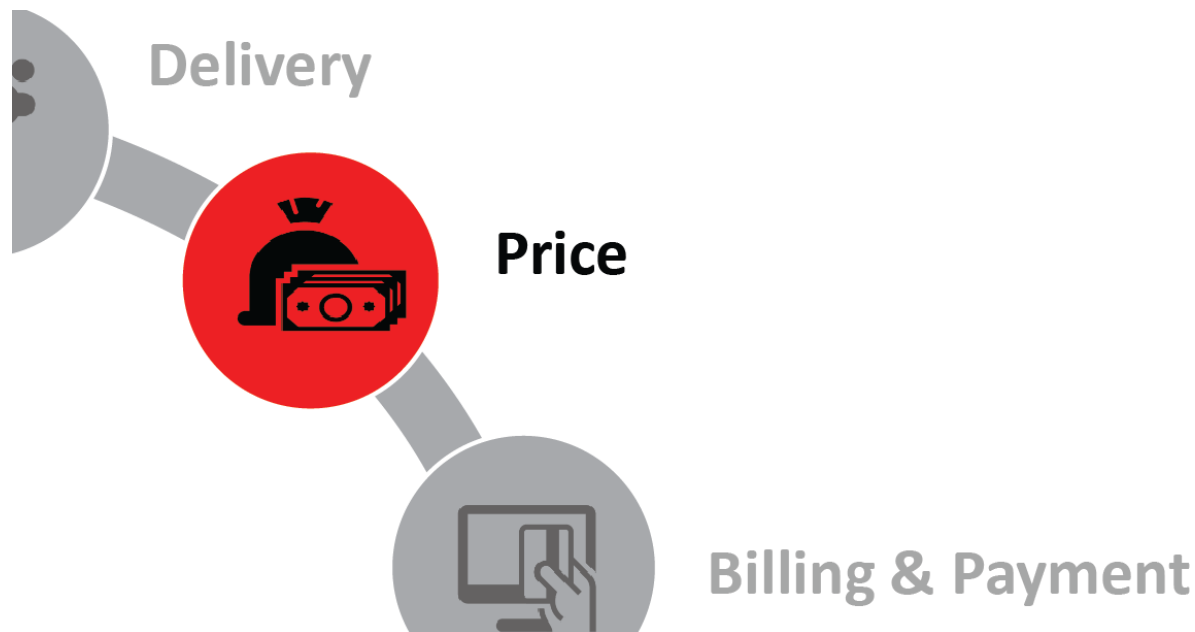
Percentage	Attributes	OCU	South
41%	Reliability of water service	8.20	7.98
32%	Quality of water	7.22	7.28
27%	Efforts to maintain the water infrastructure	7.58	7.29
	Overall delivery of water service (Avg.)	7.82	7.74



Price

Factor Performance - Price

Price	
Miami-Dade County	724
Orange County Utilities	715
Metro Water Services (Nashville)	706
The Cobb County Water System	703
Aqua-South	698
Orlando Utilities Commission (OUC)	691
Gwinnett County	689
Fairfax Water	684
City of Tampa	676
JEA	665
Charlotte Water	663
City of Dallas	662
Baton Rouge Water Company	659
South Region Average	659
MLGW	658
Palm Beach County	657
San Antonio Water System	656
City of Houston	654
City of Fort Worth	648
Manatee County	647
Tulsa Water	638
City of Newport News	636
City of Oklahoma City	635
El Paso Water Utilities	635
City of Atlanta	633
City of Raleigh	633
Jefferson Parish	631
Austin Water	603
City of Virginia Beach	603
Pinellas County	598
DeKalb County	581
Birmingham Water Works	565



Percentage	Attributes	OCU	South
38%	Total cost of your water service	7.15	6.53
36%	Fairness of pricing	7.10	6.48
26%	Ease of understanding your pricing	7.22	6.81
	Overall price (Avg.)	7.15	6.59

2 of 31 - South

2 of 87 - U.S.



Billing & Payment

Factor Performance - Billing & Payment

Billing & Payment	
Orange County Utilities	803
Miami-Dade County	792
JEA	786
Aqua-South	781
Orlando Utilities Commission (OUC)	778
Gwinnett County	777
Metro Water Services (Nashville)	776
The Cobb County Water System	776
City of Raleigh	774
San Antonio Water System	770
Palm Beach County	769
City of Dallas	768
Charlotte Water	766
Fairfax Water	765
Manatee County	764
City of Tampa	763
South Region Average	763
City of Houston	762
MLGW	760
City of Fort Worth	758
City of Atlanta	756
City of Virginia Beach	755
Jefferson Parish	755
El Paso Water Utilities	751
City of Newport News	750
City of Oklahoma City	749
Tulsa Water	738
Baton Rouge Water Company	736
Pinellas County	730
Birmingham Water Works	729
Austin Water	728
DeKalb County	700

1 of 31 - South

1 of 87 – U.S.



Billing & Payment

Conservation

Percentage	Attributes	OCU	South
28%	Ease of paying your bill	8.32	7.84
25%	Amount of time given to pay your bill	7.90	7.54
25%	Usefulness of information on your bill	7.82	7.52
22%	Variety of methods to pay your bill	8.03	7.61
	Overall billing and payment experience (Avg.)	8.06	7.72



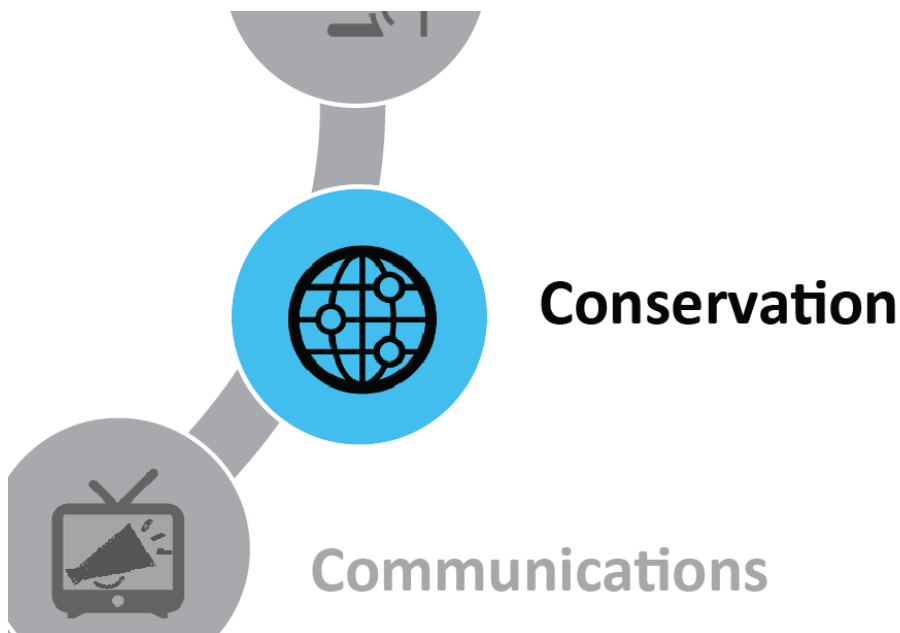
Conservation

Factor Performance - Conservation

Conservation	
Aqua-South	723
Miami-Dade County	717
Orlando Utilities Commission (OUC)	714
Orange County Utilities	706
JEA	706
Fairfax Water	705
Gwinnett County	700
San Antonio Water System	700
El Paso Water Utilities	695
Metro Water Services (Nashville)	691
City of Dallas	686
The Cobb County Water System	683
City of Newport News	680
City of Tampa	676
South Region Average	676
Palm Beach County	675
City of Fort Worth	672
Austin Water	669
Charlotte Water	669
City of Virginia Beach	665
City of Houston	660
City of Atlanta	659
Manatee County	656
Baton Rouge Water Company	645
Pinellas County	641
City of Raleigh	637
Tulsa Water	637
Jefferson Parish	635
MLGW	635
City of Oklahoma City	625
Birmingham Water Works	619
DeKalb County	604

4 of 31 - South

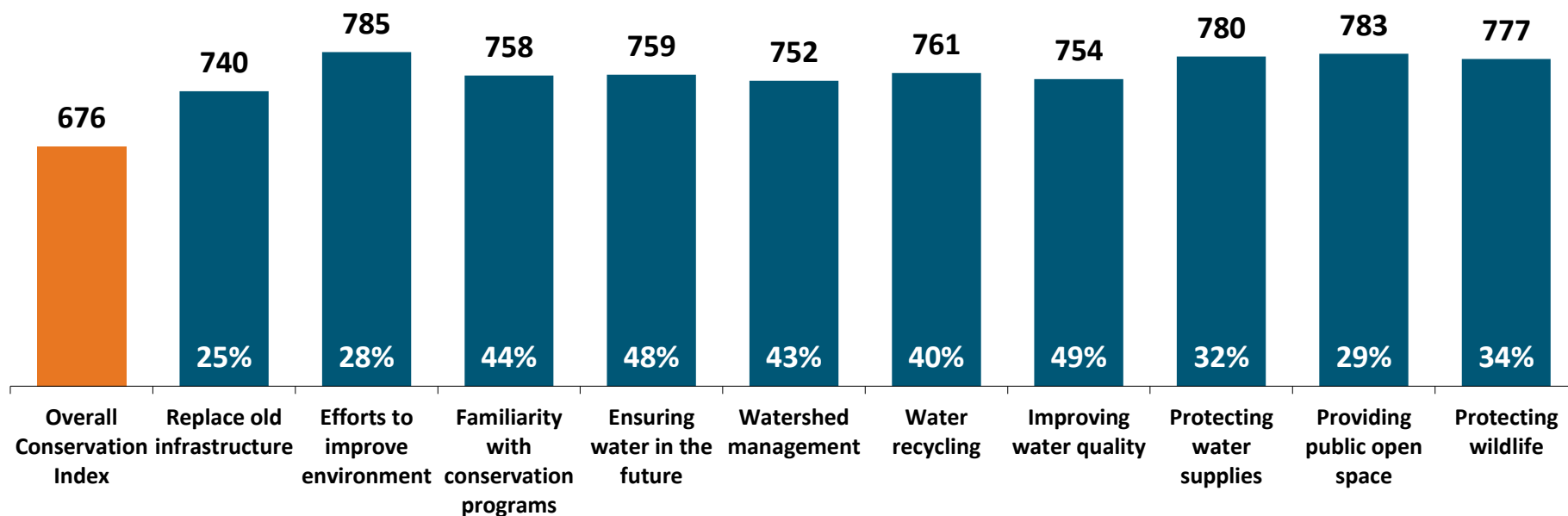
11 of 87 - U.S.



Percentage	Attributes	OCU	South
34%	Variety of water conservation programs offered	6.99	6.71
33%	Actions to take care of the environment	7.05	6.77
33%	Planning for the future	7.15	6.81
	Overall conservation (Avg.)	7.16	6.79

Conservation Index by Awareness of Utility Efforts on...

Industry



Awareness Impact on Overall Satisfaction

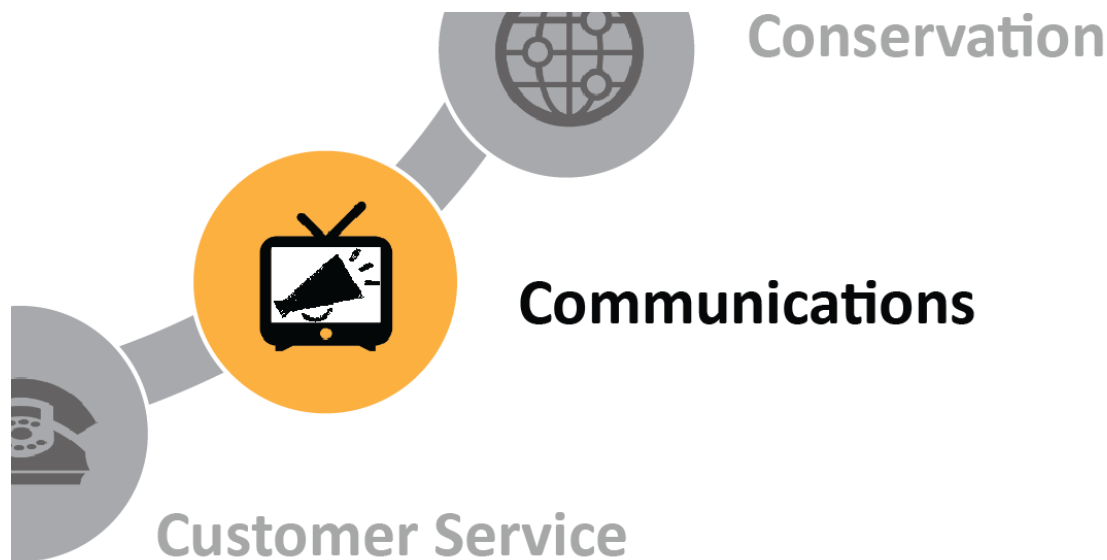




Communications

Factor Performance - Communications

Communications	
Miami-Dade County	704
Aqua-South	700
Orange County Utilities	694
JEA	691
Orlando Utilities Commission (OUC)	690
Fairfax Water	668
Gwinnett County	667
The Cobb County Water System	667
Charlotte Water	663
City of Dallas	662
San Antonio Water System	659
El Paso Water Utilities	655
Metro Water Services (Nashville)	655
South Region Average	649
City of Tampa	646
City of Newport News	643
City of Fort Worth	641
Palm Beach County	640
City of Houston	636
MLGW	634
Manatee County	630
City of Virginia Beach	628
Jefferson Parish	628
Austin Water	626
City of Atlanta	623
Baton Rouge Water Company	615
City of Raleigh	615
Pinellas County	609
City of Oklahoma City	606
Tulsa Water	605
Birmingham Water Works	601
DeKalb County	571

3 of 31 - South
5 of 87 - U.S.


Percentage	Attributes	OCU	South
26%	Efforts to communicate changes that affect account / service	7.04	6.58
26%	Usefulness of suggestions to reduce usage / lower bills	7.05	6.65
24%	Creating messages that get your attention	6.81	6.34
24%	Keeping you informed about efforts to keep water costs low	6.85	6.39
	Overall communications (Avg.)	7.07	6.63

Miami-Dade County – Highest in Communications

miamidade.gov Departments Government Employees Visitors Calendar Transparency Log In | Create Account

QUALITY.VALUE.ECONOMIC GROWTH.

miamidade.gov Make Payments iWASD GIS Service Maps News & Events Contact Us

Water and Sewer Last Visited » Water and Sewer

MY ACCOUNT

PAY WATER BILL

CUSTOMER SERVICE

FAQ'S

BILLING QUESTIONS? ASK AVA

Customer Service

Multi-Year Capital Improvement Plan

Water & Wastewater Services

NEW FEATURES FOR YOUR ACCOUNT

Access all of your Water and Sewer account information in a simple, new way.
View water-use history, enroll multiple accounts under one user name, and stop or transfer service.

MY ACCOUNT

Why register? [Read more.](#)

Working in a trench

Water meter

Working on a large pipe

Select Language

f t YouTube RSS

Social Media Center Mobile Application Center

Print Email Page Share

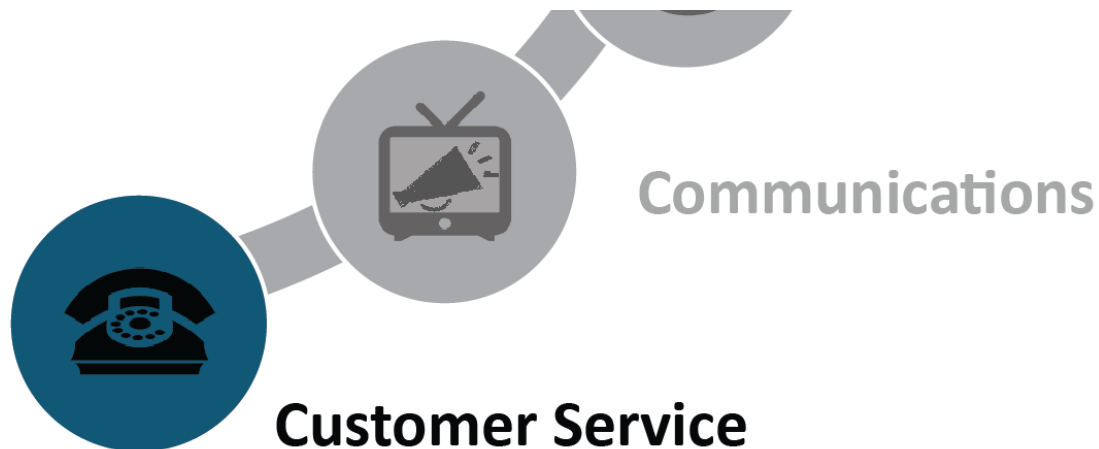
Feedback Minimize Tools



Customer Service

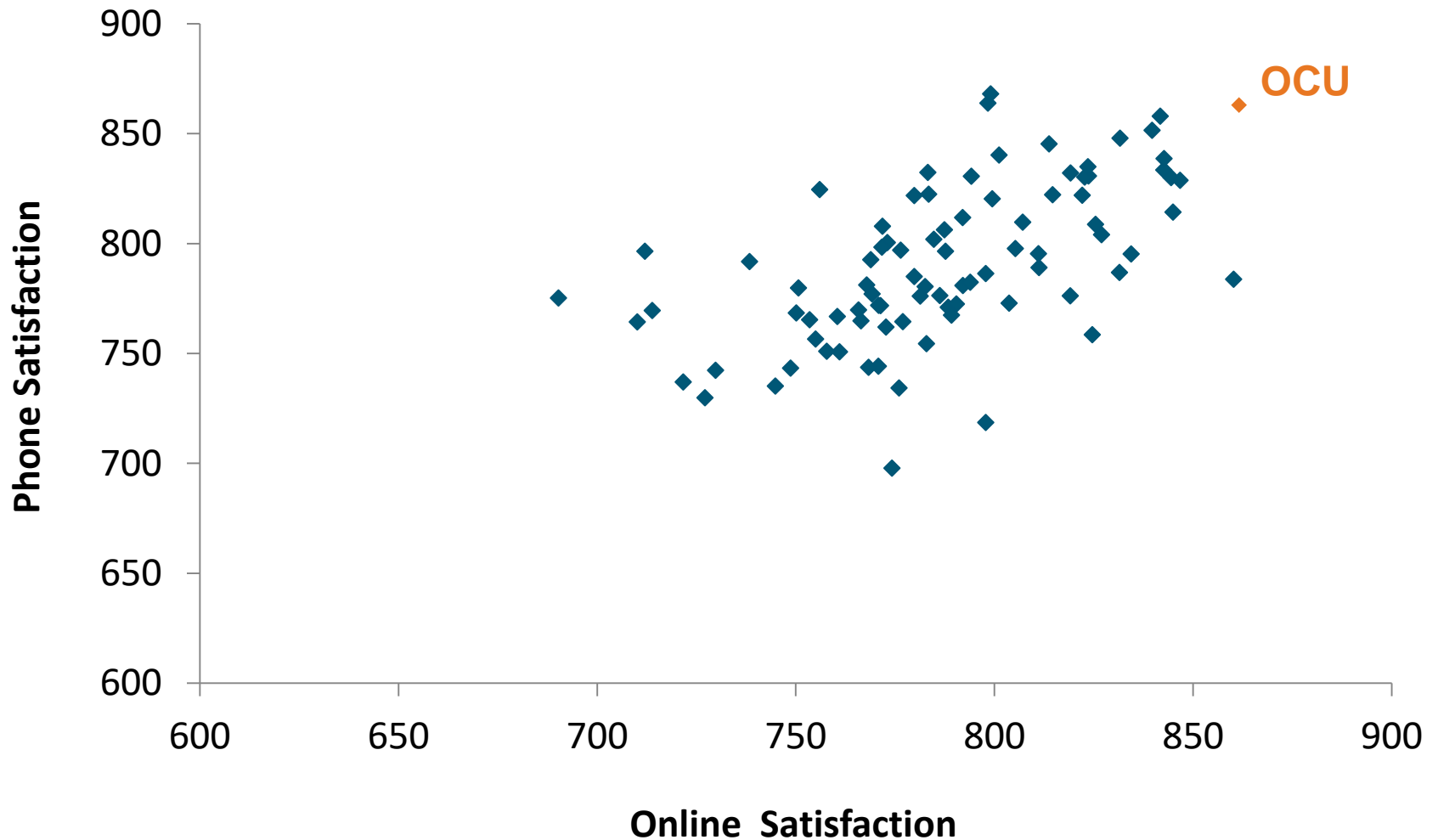
Factor Performance - Customer Service

Customer Service	
Orange County Utilities	854
Palm Beach County	845
Miami-Dade County	827
Fairfax Water	820
Aqua-South	818
Metro Water Services (Nashville)	816
Gwinnett County	812
The Cobb County Water System	806
JEA	805
City of Newport News	798
City of Dallas	797
Pinellas County	791
Orlando Utilities Commission (OUC)	788
South Region Average	787
City of Houston	784
MLGW	783
Charlotte Water	776
City of Virginia Beach	774
City of Fort Worth	772
San Antonio Water System	771
City of Atlanta	766
City of Tampa	761
El Paso Water Utilities	760
Austin Water	756
Baton Rouge Water Company	756
City of Raleigh	755
Tulsa Water	754
City of Oklahoma City	751
Manatee County	743
Birmingham Water Works	742
Jefferson Parish	739
DeKalb County	706

1 of 31 - South
1 of 87 – U.S.


Percentage	Sub Factors
49%	Telephone
34%	Online
17%	In Person / Field

Orange County Utilities – Highest in Customer Service



2018 Water Residential Study - Timetable

Wave 1

June 2017

- Readout: August 15, 2017

Wave 2

September 2017

- Readout: October 17, 2017

Wave 3

December 2017

- Readout: January 23, 2018

Wave 4

March 2018

Subscriber Webcast/VoX Delivery/mTAB Access: May 8, 2018

Press Release: May 9, 2018

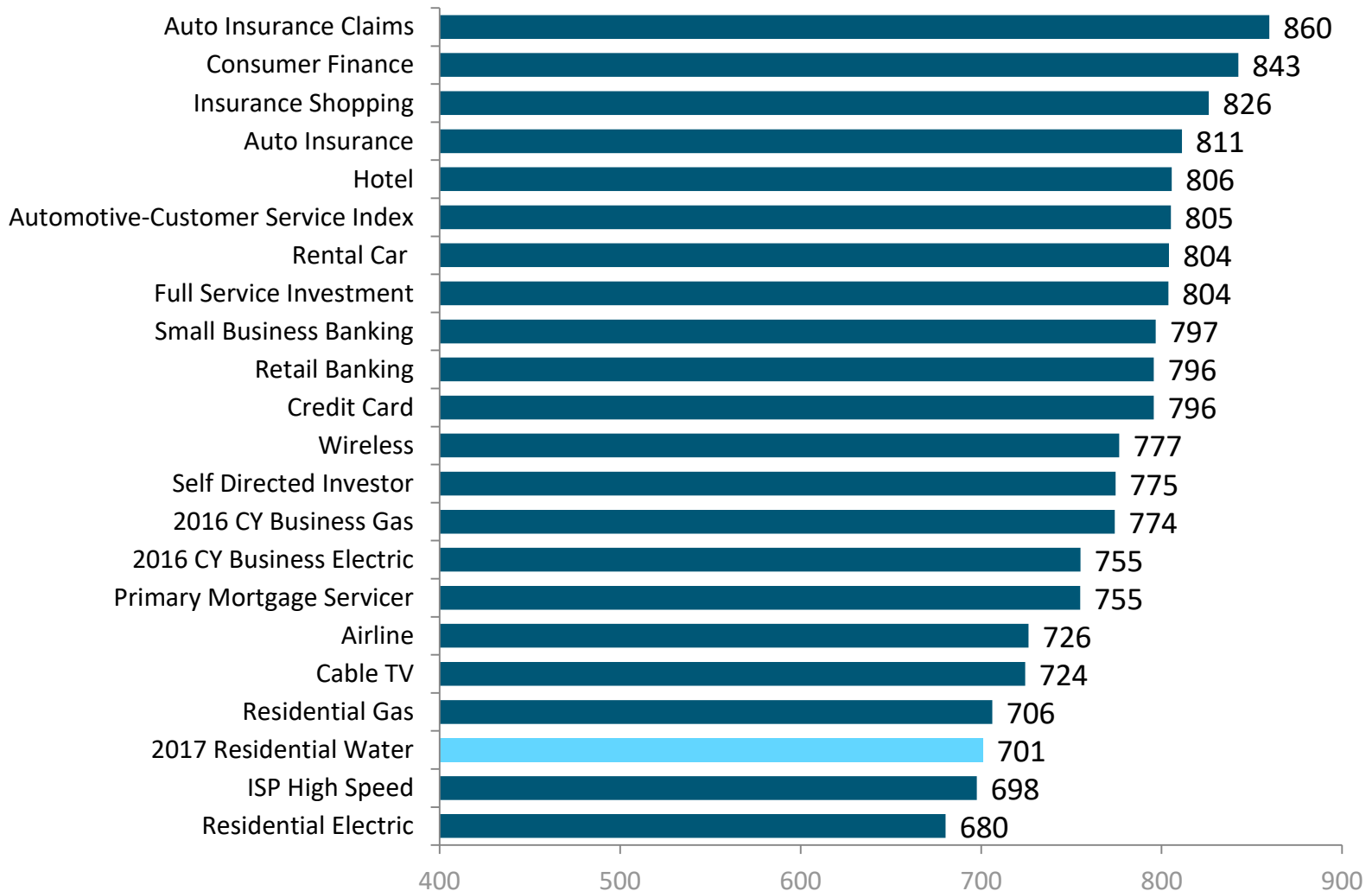
Index Scores = Average Across All 4 Waves

***Note – for 2018 added a new Wastewater Section**

Next Steps

Residential Water Utilities have one of the lowest Customer Satisfaction Indexes compared to other industries

2016 Overall Customer Satisfaction Index





Everyone
Impacts
Customer
Satisfaction

Next Steps

- Communicate findings, congratulate staff efforts
- Continue to provide best-in-class customer service
- Evaluate the J.D. Power customer survey data
- Identify improvement opportunities
 - Customers rank onsite water audit highest (9.07 of 10)
 - 28% of customers surveyed are unaware of price of water
 - 64% first call resolution
 - Electronic Billing & Payment – 37 index points
 - Better utilization of website
 - Increase customer awareness by sharing:
 - Substantial efforts in maintaining infrastructure
 - Award-winning reclaimed water program
 - Planning for future water supply



J.D. POWER

2017

Water Utility Residential Customer Satisfaction StudySM

Orange County Utilities Final Results

John Hazen, Senior Director, Utility Practice

October 17, 2017