2021 Customer Satisfaction Study
Harnessing the power of data to help clients achieve organizational goals.

**Data** to support strategic decisions to improve on 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 of understanding organizational, employee, and customer needs allowing for more informed decisions.
Project Overview

- GreatBlue was commissioned by the Turlock Irrigation District (hereinafter, “TID”) to conduct comprehensive research among its customers to gain a deeper understanding into 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 ahead for the future of the utility.

- In order to service these research objectives, GreatBlue conducted digital and telephone surveys among a random sampling of TID’s residential and commercial customers.

- 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 customer satisfaction.
The TID Customer Satisfaction & Perception Study leveraged a telephone and 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
- Desire for TID to accelerate renewable energy objectives
- Interest in energy efficiency products and services
- Likelihood to purchase 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
Benefits of Research Methodology Change

By switching to a dual-methodology, Turlock Irrigation District provided their customers a greater opportunity for honesty.

- Online Methodology allows for:
  - More transparency from respondents
    - "Prefer not to say" responses decreased by up to 6.9%
  - Broader audience
    - Collected a more even distribution of surveys among each age bracket
      - 17.0% of respondents were under 35 (compared to 43.6% in 2019)
      - 33.7% of respondents were 35 to 54 years of age (compared to 45.0% in 2019)
      - 42.4% of respondents were 55 years of age and older (compared to 6.2% in 2019)
  - Industry standard
    - IOUs, Public Power, Co-Ops
  - Convenience for respondents
    - Allows respondents to complete the survey at a time that is suitable for them
# Research Methodology Snapshot - Residential

<table>
<thead>
<tr>
<th>Methodology</th>
<th>No. of Completes</th>
<th>No. of Questions</th>
<th>Incentive</th>
<th>Sample</th>
<th>Research Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone / Digital</td>
<td>400 (328 phone + 72 digital)</td>
<td>63*</td>
<td>None</td>
<td>Customer List</td>
<td>November 22, 2021 - January 24, 2022</td>
</tr>
<tr>
<td>Target</td>
<td>Residential Customers</td>
<td>Quality Assurance: Dual-level**</td>
<td>Margin of Error: 4.9%</td>
<td>Confidence Level: 95%</td>
<td></td>
</tr>
</tbody>
</table>

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

** Supervisory personnel, in addition to computer-aided interviewing platform, ensure the integrity of the data is accurate.
Respondent Snapshot - Residential

This slide quantifies select data points to provide context for this research study. The data is not meant to be proportional to population contribution, rather to provide an empirical view into the demographic profile of the participants.

**Age**
- 18 to 24: 2.5%
- 25 to 34: 14.5%
- 35 to 44: 18.2%
- 45 to 54: 15.5%
- 55 to 64: 15.7%
- 65 or older: 26.7%
- Refused: 7.0%

**Education**
- Eighth grade or less: 1.0%
- Some high school: 4.5%
- High school graduate or GED: 18.5%
- Some technical school: 2.7%
- Technical school graduate: 3.5%
- Some college: 22.2%
- College graduate: 24.4%
- Post-graduate or professional degree: 12.7%
- Refused: 10.5%

**Family Members Working in Agriculture**
- Yes: 68.1%
- No: 24.7%
- Don't know/unsure: 0.7%
- Refused: 6.5%
This slide quantifies select data points to provide context for this research study. The data is not meant to be proportional to population contribution, rather to provide an empirical view into the demographic profile of the participants.

**Income**

- Under $9,999: 2.5%
- $10,000 to less than $25,000: 8.7%
- $25,000 to less than $40,000: 5.7%
- $40,000 to less than $50,000: 4.0%
- $50,000 to less than $60,000: 3.5%
- $60,000 to less than $75,000: 8.0%
- $75,000 or more: 26.2%
- Refused: 41.4%

**Type of Dwelling**

- Single-family home: 74.8%
- Apartment building: 8.0%
- Mobile home: 4.2%
- Town house or multi-family house: 3.2%
- Condo: 0.2%
- Other: 1.0%
- Refused: 8.5%

**Method of Heating Home**

- Gas: 56.9%
- Electricity: 26.2%
- Refused: 6.0%
- Other: 3.2%
- Wood: 3.0%
- Electric and Gas: 2.0%
- Oil: 1.2%
- Don't know/unsure: 1.5%
Respondent Snapshot

- Residential

This slide quantifies select data points to provide context for this research study. The data is not meant to be proportional to population contribution, rather to provide an empirical view into the demographic profile of the participants.

Rent or Own

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rent</td>
<td>64.3%</td>
</tr>
<tr>
<td>Own</td>
<td>27.7%</td>
</tr>
<tr>
<td>Don't know/unsure</td>
<td>7.7%</td>
</tr>
<tr>
<td>Refused</td>
<td>2.7%</td>
</tr>
</tbody>
</table>

Length of Residency

<table>
<thead>
<tr>
<th>Duration</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 1 year</td>
<td>7.7%</td>
</tr>
<tr>
<td>1 to less than 5 years</td>
<td>27.9%</td>
</tr>
<tr>
<td>5 to less than 10 years</td>
<td>15.0%</td>
</tr>
<tr>
<td>10 to less than 15 years</td>
<td>9.7%</td>
</tr>
<tr>
<td>15 to less than 20 years</td>
<td>6.0%</td>
</tr>
<tr>
<td>20 years or more</td>
<td>25.2%</td>
</tr>
<tr>
<td>Don't know</td>
<td>0.7%</td>
</tr>
<tr>
<td>Refused</td>
<td>2.7%</td>
</tr>
</tbody>
</table>

Participation in CARES program

- Yes: 73.1%
- No: 17.0%
- Don't know/unsure: 10.0%

Gender

- Female: 52.4%
- Male: 46.6%
- Other: 0.2%
- Prefer not to say: 0.7%
# Research Methodology Snapshot - Commercial

<table>
<thead>
<tr>
<th>Methodology</th>
<th>No. of Completes</th>
<th>No. of Questions</th>
<th>Incentive</th>
<th>Sample</th>
<th>Research Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone / Digital</td>
<td>103</td>
<td>56*</td>
<td>None</td>
<td>Customer List</td>
<td>November 22, 2021 - January 24, 2022</td>
</tr>
<tr>
<td>Target</td>
<td>Commercial Customers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality Assurance</td>
<td>Dual-level**</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Margin of Error</td>
<td>9.6%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Confidence Level</td>
<td>95%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

** Supervisory personnel, in addition to computer-aided interviewing platform, ensure the integrity of the data is accurate.
Respondent Snapshot - Commercial

This slide quantifies select data points to provide context for this research study. The data is not meant to be proportional to population contribution, rather to provide an empirical view into the firmographic profile of the participants.

**Years as a Customer**
- Less than 1 year: 5.8%
- 1 to less than 5 years: 19.4%
- 5 to less than 10 years: 12.6%
- 10 to less than 15 years: 7.8%
- 15 to less than 20 years: 8.7%
- 20 years or more: 33.0%
- Don't know: 1.9%
- Refused: 10.7%

**Number of Employees**
- 10 employees or less: 43.7%
- 11 to 25: 18.4%
- 26 to 75: 3.9%
- 76 to 150: 1.0%
- 151 or more: 1.9%
- Other: 1.9%
- Don't know: 5.8%
- Refused: 23.3%

**Monthly Electric Bill**
- $200 or less: 22.3%
- $201 to $400: 12.6%
- $401 to $600: 4.9%
- $601 to $800: 0.0%
- $801 to $1,000: 1.0%
- $1,001 to $1,200: 0.0%
- Over $1,200: 13.6%
- Other: 1.9%
- Don't know: 24.3%
- Refused: 19.4%
In 2021, TID scored an average positive rating of 83.8% among residential customers, down from 86.4% in 2019. The largest decreases in ratings were recorded for “community involvement” (-7.5 percentage points) and “helping customers conserve electricity” (-6.4 percentage points). Commercial customers' average positive ratings increased (84.8% in 2021 over 81.2% in 2019), with the largest increases recorded for “providing good service and value for the cost of electricity” (+11.3 percentage points) and “overall satisfaction with TID” (+9.9 percentage points).

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Communicating with customers</td>
<td>88.0</td>
<td>87.5</td>
<td>84.0</td>
<td>85.9</td>
<td>85.1</td>
<td>86.8</td>
</tr>
<tr>
<td>Responding promptly to customers</td>
<td>90.7</td>
<td>87.6</td>
<td>84.9</td>
<td>90.6</td>
<td>87.9</td>
<td>87.0</td>
</tr>
<tr>
<td>Helping customers conserve electricity</td>
<td>82.9</td>
<td>82.6</td>
<td>76.2</td>
<td>81.8</td>
<td>81.6</td>
<td>71.1</td>
</tr>
<tr>
<td>Being open and honest about company operations and policies</td>
<td>85.7</td>
<td>84.1</td>
<td>82.2</td>
<td>89.3</td>
<td>76.9</td>
<td>80.9</td>
</tr>
<tr>
<td>Reliable infrastructure</td>
<td>92.4</td>
<td>91.1</td>
<td>89.9</td>
<td>91.7</td>
<td>83.0</td>
<td>86.8</td>
</tr>
<tr>
<td>Providing good service and value for the cost of electricity</td>
<td>82.5</td>
<td>83.6</td>
<td>85.7</td>
<td>79.8</td>
<td>78.6</td>
<td>89.9</td>
</tr>
<tr>
<td>Community involvement</td>
<td>82.7</td>
<td>82.1</td>
<td>74.6</td>
<td>88.2</td>
<td>74.3</td>
<td>83.8</td>
</tr>
<tr>
<td>Helpful and knowledgeable staff</td>
<td>92.0</td>
<td>90.4</td>
<td>88.7</td>
<td>88.9</td>
<td>84.6</td>
<td>88.2</td>
</tr>
<tr>
<td>Overall satisfaction with TID</td>
<td>88.2</td>
<td>88.7</td>
<td>87.8</td>
<td>87.4</td>
<td>79.2</td>
<td>89.1</td>
</tr>
<tr>
<td>Average</td>
<td>87.2</td>
<td>86.4</td>
<td>83.8</td>
<td>87.1</td>
<td>81.2</td>
<td>84.8</td>
</tr>
</tbody>
</table>
Online and Phone Ratings Comparison

TID scored an average positive rating of 84.0% among phone respondents and 83.0% among online respondents. The largest differences between phone and online ratings were recorded for "providing good service and value for the cost of electricity" (90.5% online over 84.5% phone), "community involvement" (75.5% phone over 70.7% online), "communicating with customers" (84.7% phone over 81.1% online) and "overall satisfaction with TID" (88.5% phone over 85.1% online).

<table>
<thead>
<tr>
<th></th>
<th>Phone</th>
<th>Online</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communicating with customers</td>
<td>84.7</td>
<td>81.1</td>
</tr>
<tr>
<td>Responding promptly to customers</td>
<td>85.2</td>
<td>83.9</td>
</tr>
<tr>
<td>Helping customers conserve electricity</td>
<td>76.3</td>
<td>76.1</td>
</tr>
<tr>
<td>Being open and honest about company operations and policies</td>
<td>82.3</td>
<td>81.8</td>
</tr>
<tr>
<td>Reliable infrastructure</td>
<td>90.1</td>
<td>88.9</td>
</tr>
<tr>
<td>Providing good service and value for the cost of electricity</td>
<td>84.5</td>
<td>90.5</td>
</tr>
<tr>
<td>Community involvement</td>
<td>75.5</td>
<td>70.7</td>
</tr>
<tr>
<td>Helpful and knowledgeable staff</td>
<td>88.6</td>
<td>89.1</td>
</tr>
<tr>
<td>Overall satisfaction with TID</td>
<td>88.5</td>
<td>85.1</td>
</tr>
<tr>
<td>Average</td>
<td>84.0</td>
<td>83.0</td>
</tr>
</tbody>
</table>

N= 328 phone completes
N= 72 online completes
TID's average positive rating of 83.8% was higher than the average positive ratings provided by California's municipal utility customers in the Public Power Data Source (61.8%) and by municipal utility customers nationwide (65.7%).

<table>
<thead>
<tr>
<th></th>
<th>Turlock Irrigation District</th>
<th>California PPDS</th>
<th>National PPDS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2021</td>
<td>2021</td>
<td>2021</td>
</tr>
<tr>
<td>Communicating with customers</td>
<td>84.0</td>
<td>63.3</td>
<td>68.3</td>
</tr>
<tr>
<td>Responding promptly to customers</td>
<td>84.9</td>
<td>63.4</td>
<td>68.8</td>
</tr>
<tr>
<td>Helping customers conserve electricity</td>
<td>76.2</td>
<td>60.5</td>
<td>58.5</td>
</tr>
<tr>
<td>Being open and honest about company operations and policies</td>
<td>82.2</td>
<td>60.5</td>
<td>62.9</td>
</tr>
<tr>
<td>Reliable infrastructure</td>
<td>89.9</td>
<td>60.4</td>
<td>66.9</td>
</tr>
<tr>
<td>Providing good service and value for the cost of electricity</td>
<td>85.7</td>
<td>59.9</td>
<td>64.2</td>
</tr>
<tr>
<td>Community involvement</td>
<td>74.6</td>
<td>59.3</td>
<td>63.5</td>
</tr>
<tr>
<td>Helpful and knowledgeable staff</td>
<td>88.7</td>
<td>62.7</td>
<td>68.3</td>
</tr>
<tr>
<td>Overall satisfaction your local electric utility</td>
<td>87.8</td>
<td>66.5</td>
<td>69.9</td>
</tr>
</tbody>
</table>

Average: 83.8% (TID), 61.8% (California PPDS), 65.7% (National PPDS)

California PPDS respondents were customers of 40 different public power utilities in California.

N= 12,000 National PPDS completes
N= 1,019 California PPDS completes
Satisfied with Office Personnel

Residential and commercial customers reported contacting office personnel primarily for general inquiries such as "to pay bill" (42.6% residential, 35.6% commercial), "start or open service" (11.0% residential, 15.6% commercial) or a "question on bill" (9.7% residential, 24.4% commercial). Additionally, the strong majority of residential (96.1% in 2021 from 96.8% in 2019) and commercial customers (100.0% in 2021 over 98.0% in 2019) reported being satisfied with the way the customer service employee handled the call or visit.

How satisfied were you with the service provided by the TID employee?

<table>
<thead>
<tr>
<th>Purpose of Call/Visit</th>
<th>Residential</th>
<th>Commercial</th>
</tr>
</thead>
<tbody>
<tr>
<td>To pay bill</td>
<td>42.6%</td>
<td>35.6%</td>
</tr>
<tr>
<td>Start or Open Service</td>
<td>11.0%</td>
<td>15.6%</td>
</tr>
<tr>
<td>Question on bill (not a complaint)</td>
<td>9.7%</td>
<td>24.4%</td>
</tr>
<tr>
<td>Report an outage</td>
<td>6.5%</td>
<td>6.7%</td>
</tr>
<tr>
<td>Set up payment arrangement</td>
<td>5.8%</td>
<td>4.4%</td>
</tr>
<tr>
<td>Service call</td>
<td>4.5%</td>
<td>8.9%</td>
</tr>
</tbody>
</table>

Please tell me the purpose of the call or visit? (Top 6 values shown)
The majority of residential customers (88.1% from 91.3% in 2019) and commercial customers (89.4% from 92.1% in 2019) reported TID meets expectations “all” or “most” of the time in 2021. In addition, when asked about their top three (3) expectations of TID, top responses from both customer bases included “reasonable / competitive / low rates” (48.9% residential, 38.8% commercial), “provide continuous / reliable service” (46.4% residential, 47.6% commercial) and "good / courteous / respectful / helpful customer service" (43.4% residential, 39.8% commercial).

<table>
<thead>
<tr>
<th>Expectation</th>
<th>Residential</th>
<th>Commercial</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reasonable/competitive/low rates</td>
<td>48.9%</td>
<td>38.8%</td>
</tr>
<tr>
<td>Provide continuous/reliable service</td>
<td>46.4%</td>
<td>47.6%</td>
</tr>
<tr>
<td>Good/courteous/respectful/helpful customer service</td>
<td>43.4%</td>
<td>39.8%</td>
</tr>
</tbody>
</table>
In 2021, TID scored a net positive rating (advocate + loyal + satisfied customer) of 95.5% among residential customers (from 95.7% in 2019) and 92.3% among commercial customers (from 96.1% in 2019). Of note, an increased frequency of residential customers reported being either "an advocate of TID" (12.2% over 2.7% in 2019) or a "loyal customer" (32.9% over 27.1% in 2019).
Increased Awareness of Local Ownership

TIO is a “Community Owned Utility.” Which of the following statements best reflects your level of awareness regarding TIO’s community ownership? Would you say...

- 84.5% of residential customers find it important that TIO is community owned.
- 75.7% of commercial customers find it important that TIO is community owned.

- 18.4% of residential customers have not heard that TIO is community owned.
- 23.4% have heard that TIO is community owned, but don’t know much about what it means.
- 28.2% have a basic understanding that TIO is community owned.
- 30.4% have a fairly complete understanding that TIO is community owned, how it is governed, and how it benefits the community.
- 52.7% have not heard that TIO is community owned.
One-quarter of residential respondents (24.7%) and one-third of commercial respondents (33.0%) reported a benefit of being a Community Owned utility is "local control," while others reported "support of the community" (16.5% residential, 21.4% commercial) and "lower rates" (15.5% residential, 9.7% commercial) are benefits of being Community Owned.
Satisfied with Outage Restoration Time

Of those that have experienced an outage in the last 12 months, a consistently high frequency of residential (98.0% from 98.3% in 2019) and commercial (97.1% over 96.1% in 2019) respondents reported being satisfied with the outage restoration time. Respondents primarily indicated they would like TID to keep them updated during an outage through "text message" (59.1% residential, 56.3% commercial), "direct phone call" (31.4% residential, 31.1% commercial) or "email" (13.7% residential, 19.4% commercial).

If you have experienced an outage in the last 12 months, how satisfied were you with the outage restoration time?

<table>
<thead>
<tr>
<th>Satisfaction Level</th>
<th>Residential</th>
<th>Commercial</th>
</tr>
</thead>
<tbody>
<tr>
<td>Satisfied</td>
<td>98.3%</td>
<td>96.0%</td>
</tr>
<tr>
<td>Not Satisfied</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Don't know/unsure</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If you were to experience an outage, how would you like TID to notify you or to find additional information about the outage?

<table>
<thead>
<tr>
<th>Notification Method</th>
<th>Residential</th>
<th>Commercial</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text message</td>
<td>59.1%</td>
<td>56.3%</td>
</tr>
<tr>
<td>Direct phone call</td>
<td>31.4%</td>
<td>31.1%</td>
</tr>
<tr>
<td>Email</td>
<td>13.7%</td>
<td>19.4%</td>
</tr>
<tr>
<td>Utility website</td>
<td>12.7%</td>
<td>10.7%</td>
</tr>
<tr>
<td>Mobile application</td>
<td>11.5%</td>
<td>6.8%</td>
</tr>
<tr>
<td>Other</td>
<td>4.7%</td>
<td>5.8%</td>
</tr>
<tr>
<td>Facebook</td>
<td>3.0%</td>
<td>1.0%</td>
</tr>
</tbody>
</table>
Over one-half of residential respondents (54.5%) and three-fifths of commercial respondents (60.4%) indicated they are "generally satisfied with the information and updates they receive from TIO," while 28.8% of residential respondents and 20.8% of commercial respondents indicated they "feel TIO needs to provide better information and updates to affected customers." Regarding additions or changes to keep customers more updated during an outage, respondents indicated TIO can provide "phone alerts / updates" (24.0% residential, 39.6% commercial) and "provide detailed / accurate / frequent updates and estimates" (10.3% residential, 3.8% commercial).
Nearly all surveyed residential (98.0% from 98.3% in 2019) and commercial (97.1% over 96.1% in 2019) customers reported they are satisfied with the reliability of TID’s electric service. Three-out-of-ten residential customers (30.4%) and over two-fifths of commercial customers (43.7%) indicated TID’s electric reliability is "about the same" as other utilities in the area, while more residential customers (37.7%) indicated TID’s reliability is "higher than others." Of note, over one-quarter of respondents (26.9% residential, 28.2% commercial) were unsure how TID’s reliability compares to other utilities in the area.

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

--- | --- | --- | --- | --- | ---
Satisfied | 96.0%  | 98.0%  | 94.0%  | 98.3%  | 96.1%  | 97.1%
Not Satisfied | 3.2%  | 2.9%  | 1.0%  | 1.0%  | 4.0%  | 0.0%

How does TID’s electric reliability compare to other utilities in the area? Would you say TID’s reliability is higher than others, lower than others, or about the same as others?

Residential - 2021  | Commercial - 2021
--- | ---
Higher than others | 37.7%
About the same as others | 43.7%
Lower than others | 5.0%
Don’t know / Unsure | 26.9%  | 28.2%
Roughly one-half of residential (50.4%) and commercial (45.6%) respondents indicated they are "not willing to accept more power outages in exchange for lower rates," while over one-quarter of respondents (25.9% residential, 29.1% commercial) reported this depends on factors such as the number of outages and their duration, and how much money they would save. Of note, a decreased frequency of commercial respondents (6.8% from 17.6% in 2019) indicated they are "willing to accept more power outages in exchange for lower rates," while more commercial respondents (29.1% over 19.6% in 2019) reported this depends on factors surrounding the outages and money saved.

While some customers suggest they would sacrifice less reliable electric service in an effort to obtain lower electric rates, others suggest they would prefer greater reliability of electric service over lower electric rates. Which statement most resembles how you feel with respect to reliability and rates? Would you say...

- I am willing to accept more power outages in exchange for lower rates
- I am not willing to accept more power outages in exchange for lower rates
- It depends (what is meant by more outages (#'s & duration) and how much $ saved)
- Don't know/unsure
Do you believe that TIO should remain on pace with the state of California’s goals for achieving a 100% carbon free power supply by 2045, or should TIO accelerate this goal and achieve a 100% carbon neutral power supply at an earlier date, understanding that this may result in increased electric rates?

TIO should accelerate their plans to reach this goal sooner than 2035
Roughly three-quarters of surveyed residential customers (78.0%) and commercial customers (74.8%) indicated the price they pay for electricity is either "very reasonable" or "somewhat reasonable." A similar frequency of respondents (77.8% residential, 73.8% commercial) reported they have either "a great deal of trust" or "some trust" that TID does all it can to keep its rates low.
The majority of respondents (65.6% residential, 74.8% commercial) could not recall the last rate increase TID initiated, while roughly one-quarter (27.2% residential, 22.3% commercial) recalled a rate increase "approximately 2 years ago." Nearly one-half of residential respondents (47.6%) and almost three-fifths of commercial respondents (59.2%) indicated the rates they pay to TID are "about the same as neighboring utilities," while roughly one-quarter (27.2% residential, 20.4% commercial) reported "TID is less expensive" than surrounding utilities.
Nearly nine-out-of-ten residential respondents, 88.8%, indicated it is "very important" (72.6%) or "somewhat important" (16.2%) to them that TID provides the water supply for area agriculture, while a lower frequency of commercial respondents (77.7%) reported the same.
Over two-thirds of residential customers (67.4% from 70.9% in 2019) were "very likely" (47.4%) or "somewhat likely" (20.0%) to use a mobile app from TID to check account information, pay a bill, or report an outage. Additionally, an increased frequency of commercial customers (59.2% over 47.1% in 2019) reported being "very likely" (38.8%) or "somewhat likely" (20.4%) to use such an app.
Over two-fifths of surveyed residential customers reported being interested in "TIO offering an online store for customers to purchase smart thermostats, LEDs, power strips, etc." (42.9\% from 50.2\% in 2019) and "purchasing energy efficient appliances" (42.4\% from 45.3\% in 2019).

Further, roughly one-third of respondents (33.7\% residential, 31.1\% commercial) reported interest in "installing smart thermostats for your home (or business)," and a similar frequency of commercial respondents (34.0\%) reported interest in "conducting an energy efficiency audit for your home (or business)."

Fewer respondents (21.4\% residential, 18.4\% commercial) indicated they would be interested in "purchasing an electric vehicle or installing an EV charger for their home (or business)."

Please indicate if you are interested in learning more about or investing in any of the following products or services... (Total "yes" responses)
While over one-half of residential respondents (52.6%) indicated they are not thinking of purchasing an electric vehicle in the future, nearly one-quarter (24.0%) reported they are thinking of purchasing one within the next five years. Over one-quarter of respondents (28.4%) indicated the availability of more public electric vehicle charging stations in Turlock would increase their decision to purchase an electric vehicle, while nearly three-fifths of respondents (57.6%) reported it would not.
While over one-quarter of residential respondents (26.2%) indicated knowing TID offers a $500 rebate on the purchase of a qualifying electric vehicle influences their decision to purchase an EV either "very much" or "somewhat," one-half (49.9%) indicated this "not at all" influences their decision. One-fifth of respondents (20.0%) indicated they would purchase an electric vehicle for "under $20,000," while 15.5% would purchase one for "$20,000 to $29,999" and 10.0% would purchase an electric vehicle for "$30,000 to $39,999."

To what extent does knowing that TID offers a $500 rebate on the purchase of a qualifying electric vehicle influence your decision to purchase an EV?

At which of the following price points would you be willing to purchase an electric vehicle?
Over three-fifths of residential respondents (62.6%) and over two-thirds of commercial respondents (68.0%) reported they go to the "TID website" for information about TID programs and services, while 18.2% of residential customers and 12.6% of commercial customers indicated they rely on "bill inserts" for this information. Over one-quarter of residential (27.9%) and commercial (27.2%) customers reported their preferred method of doing business with TID is "online/website." More commercial respondents reported they prefer doing business through "email" (17.5%), while more residential customers prefer doing business by "cell phone" (19.2%) or "landline telephone" (18.2%).
Over one-quarter of respondents (27.9% residential, 27.2% commercial) indicated they would prefer to receive information from TID through "email," while over one-fifth of residential respondents (22.2%) and one-quarter of commercial respondents (25.2%) reported a preference for receiving information through the "TID website."

Other respondents reported they would prefer to receive information from TID through "bill inserts" (17.2% residential, 14.6% commercial) or "mailings / printed newsletters" (15.7% residential, 14.6% commercial).
Roughly one-half of respondents (51.6% residential, 47.6% commercial) indicated they would be interested in receiving an email from TID providing the latest news, rebate opportunities and giveaways. Additionally, over two-fifths of residential respondents (43.9%) and over one-third of commercial respondents (36.9%) reported they would be interested in participating in an evening program to learn about the operations of the District and tour TID facilities.

If TID was to offer an evening program through which customers could learn about the operations of the District and tour TID facilities like the Power Control Center and Don Pedro Dam, how interested would you be in participating?

How interested would you be in receiving an email from TID providing the latest news, rebate opportunities and giveaways?
While over one-half of residential respondents (52.4%) and three-fifths of commercial respondents (60.2%) indicated they have visited the TID website "within the last 6 months," many reported they "have never visited TID.org" (23.4% residential, 15.5% commercial). Those who have visited the website reported doing so to "pay my bill" (59.6% residential, 55.2% commercial) or look for "rebate information" (11.7% residential, 9.2% commercial) during their most recent visit.

What information were you seeking the most recent time you visited the website? (Top 10 values shown)

<table>
<thead>
<tr>
<th>Information</th>
<th>Residential</th>
<th>Commercial</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay my bill</td>
<td>59.6%</td>
<td>55.2%</td>
</tr>
<tr>
<td>Rebate information</td>
<td>11.7%</td>
<td>9.2%</td>
</tr>
<tr>
<td>Outage information</td>
<td>8.5%</td>
<td>3.4%</td>
</tr>
<tr>
<td>Information regarding the irrigation season</td>
<td>4.6%</td>
<td>3.4%</td>
</tr>
<tr>
<td>Other</td>
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<td>5.7%</td>
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<tr>
<td>Assistance program information</td>
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<td>5.7%</td>
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<tr>
<td>To find out how to contact TID</td>
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<td>5.7%</td>
</tr>
<tr>
<td>Billing / view statements</td>
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<td>2.3%</td>
</tr>
<tr>
<td>Don't know / refused</td>
<td>1.6%</td>
<td>3.4%</td>
</tr>
<tr>
<td>Career / job opportunities</td>
<td>0.3%</td>
<td>2.3%</td>
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</table>
**Key Study Findings - Convey Benefits of Electric Vehicles to Customers**

What we learned:
Over one-half of residential respondents reported they are not thinking of purchasing an electric vehicle in the future. Further, nearly three-fifths of respondents indicated the availability of public electric vehicle charging stations would not increase their likelihood to purchase an electric vehicle, and one-half indicated TID offering a $500 rebate on the purchase of a qualifying electric vehicle "not at all" influences their decision to purchase one.

Takeaway:
Despite the trend toward electric vehicle purchases, specifically in California, many of TID's residential customers are not considering purchasing an electric vehicle in the future, and factors such as an increased number of public charging stations in Turlock and a rebate to reduce the cost of purchasing an electric vehicle are not influencing customers' decision to purchase an electric vehicle.

Actionable strategy:
TID should increase efforts to convey the benefits of purchasing an electric vehicle to customers, to encourage respondents to consider purchasing an electric vehicle in the future.
**Key Study Findings - Offer Mobile App for Customers**

**What we learned:**
More than two-thirds of residential respondents and nearly three-fifths of commercial respondents reported being likely to use a mobile app from TIO to check account information, pay a bill, or report an outage. Further, the likeliness of commercial respondents to use such an app increased by 12.1 percentage points over 2019.

**Takeaway:**
TIO customers are increasingly interested in being able to complete bill payment, report an outage or check their account information through a mobile app.

**Actionable strategy:**
TIO should take steps to implement a mobile app for customers in the coming years, in order to provide customers with a more convenient and centralized location to complete several tasks through a smartphone or tablet. Additionally, TIO should begin to educate customers of what this app would entail, and how to navigate through the app to complete tasks efficiently.
Key Study Findings - Educate Customers of Energy Conservation Programs and Rebates

What we learned:
In 2021, a decreased frequency of residential respondents gave positive ratings for TID "helping customers conserve electricity." This was one of the main factors resulting in a lower average positive rating among residential customers in 2021.

Takeaway:
Residential customers are providing lower ratings for TID’s efforts to help customers use less electricity than in previous years, which may be due to customers being less aware of the energy conservation programs and rebates TID is currently offering.

Actionable strategy:
In order to receive higher ratings for helping customers conserve electricity moving forward, it is recommended that TID provide additional education to customers about ways they can participate in TID's energy conservation programs and rebates, including criteria for participating in these programs, and the benefits of enrolling.
Considerations

- **Demonstrate benefits of electric vehicles to customers.** Over one-half of surveyed residential customers indicated they are not considering the purchase of an electric vehicle in the future. Further, nearly three-fifths reported the availability of public charging stations in the area would not increase their likelihood to purchase an electric vehicle, and one-half indicated TID offering a $500 rebate on the purchase of a qualifying electric vehicle "not at all" influences their decision to purchase one. Despite an increase in electric vehicle purchases in recent years, and more mandates enforcing the sale of electric vehicles over gasoline vehicles, many surveyed TID customers are not thinking of purchasing an electric vehicle in the future. In order to encourage more customers to consider an electric vehicle purchase for their next vehicle, it is recommended that TID increase their communication efforts surrounding the benefits of electric vehicles to customers. These materials should convey cost savings customers will see over time, the overall environmental impact of driving an electric vehicle compared to a gasoline vehicle, as well as ways the range of electric vehicles and availability of public charging stations are improving, to make electric vehicles easier for drivers to operate. By conveying the benefits of electric vehicles, TID may encourage more customers to consider such a purchase in the future.

- **Offer a mobile app for customers.** An increased frequency of commercial respondents, and more than two-thirds of residential respondents, reported a likelihood to use a mobile app from TID for checking account information, bill payment or reporting outages. Knowing that there is substantial interest among customers in TID offering such an app, it is recommended that TID look to implement a mobile app in the coming years. In addition, it is suggested that TID begin educating customers of the functionalities possible within this app and how to best navigate through the app, to help build customer interest and ensure customers have a seamless user experience once the app is rolled out.
Considerations

- **Educate customers of energy conservation programs and rebates.** In 2021, a lower frequency of residential respondents provided positive ratings for TID "helping customers conserve electricity," which was a factor that ultimately resulted in a lower average positive rating among residential respondents in 2021. Lower ratings in this area may be due to customers not being aware of the energy conservation programs and rebates TID is currently offering. For this reason, it is recommended that TID increase their promotion of their various rebate programs and energy efficiency offerings, beyond including content regarding each program on the TID website. Direct outreach to customers educating them of TID’s energy efficiency programs may be beneficial in increasing awareness of TID’s efforts to help customers conserve electricity. This information should be distributed through emails or bill inserts, as respondents cited these as preferred methods of communication with TID. These materials may direct customers to the TID website to learn more about their energy efficiency offerings, but with emails and bill inserts sent, customers will have greater exposure to these program offerings. Further, in their direct outreach, TID may include information regarding the criteria required to participate in their programs, as well as benefits of their enrollment. This may help to both boost overall awareness of TID’s efforts to help customers save electricity and money, as well as drive increased participation in these programs.