



2024 Customer Satisfaction Study



Report of Findings

11 April 2024
Confidential & Proprietary

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Project Overview

Research Objectives

- GreatBlue Research was commissioned by New Braunfels Utilities (hereinafter "NBU") to conduct market research to understand how satisfied their customers are with NBU and its recent advancements.
- The primary goals of this research study were to assess the effectiveness of NBU's ability to serve its customers, identify areas for improvement, and isolate areas that may increase engagement.
- The outcome of this research will enable NBU 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.



Areas of Investigation in 2024

The NBU Residential & Commercial Customer Satisfaction Survey leveraged a telephone and digital research methodology to address the following areas of investigation:

- Rating NBU's organizational characteristics
- Satisfaction with customer service and field service
- Satisfaction with the reliability of NBU's services
- Expectations of NBU and the extent to which they are met
- Perceived value of NBU's programs and services
- Preferred communication methods
- Perception of NBU's efforts to help customers reduce usage and conserve resources
- Demographic profile of respondents
- Firmographic profile of respondents

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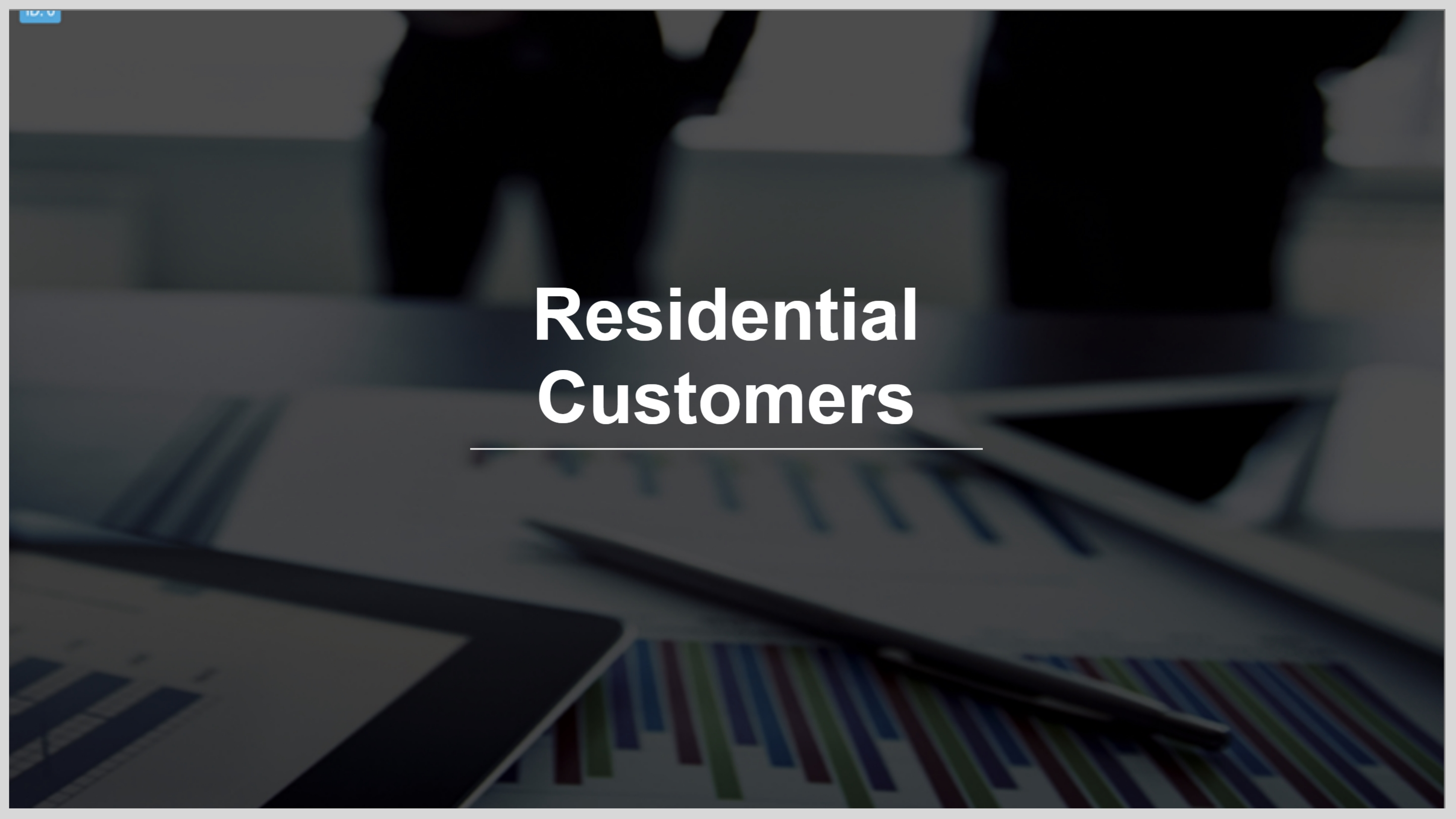
Research Methodology | Residential Snapshot

Methodology Digital / Telephone	No. of Completes 1,837 Total (1,585 Digital and 252 Telephone)	No. of Questions 48*	Incentive None	Sample Customer Sample
Target Residential Customers	Quality Assurance Dual-level**	Margin of Error +/- 2.2%	Confidence Level 95%	Research Dates February 26 - March 26, 2024

* 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, in addition to computer-aided interviewing platforms, ensure the integrity of the data is accurate.

Residential Customers



Key Takeaways





- Methodology impacts ratings - customers who took the survey online provided lower ratings than customers who took the survey by phone, across the board.
 - This is very common - in online surveys, respondents provide more honest and candid feedback, which can sometimes mean more negative feedback, than in phone surveys.
 - Declined ratings in many cases can be attributed to an increase in online survey responses across the past few studies.
- GreatBlue is also seeing declines due to more younger customers (Millennials and Gen Z) taking surveys, who generally have higher expectations and provide lower ratings for their utility as a result.
- GreatBlue saw declines in data in Texas through PPDS from 2022 to 2023.
- As the NBU community continues to grow, you will likely continue to see more young customers, renters, and newer residents completing surveys, who tend to provide lower ratings.

Satisfaction | Organizational Characteristics

In 2024, customers provided an average positive rating of 44.4% for NBU’s organizational characteristics, which marked a decrease of 3.1 percentage points from 2023. This decline stemmed from customers providing lower ratings for three (3) of eight (8) benchmarking characteristics compared to 2023. Of note, while online survey respondents provided a decreased average positive rating for NBU, the average positive rating among phone survey respondents increased.

Aggregate of "Somewhat agree - 04" and "Strongly agree - 05" responses without "don't know" responses

	2022			2023			2024				
	Phone	Online	Composite	Phone	Online	Composite	Phone	Online	Composite		
NBU’s staff is helpful and knowledgeable	87.7%	76.4%	81.2%	69.6%	56.4%	60.6%	72.1%	55.9%	58.4%	58.6%	65.5%
NBU is involved in the community	75.1%	72.9%	73.7%	61.0%	53.6%	56.0%	66.2%	45.2%	48.7%	52.8%	59.3%
NBU does a good job communicating with customers	83.2%	68.9%	74.8%	57.1%	48.7%	51.2%	70.1%	44.6%	48.3%	60.4%	65.3%
NBU promptly responds to customer questions and complaints	84.1%	68.4%	75.1%	59.7%	46.1%	50.5%	66.2%	44.8%	48.2%	59.8%	65.7%
I am satisfied overall with NBU	85.5%	68.0%	75.1%	60.7%	41.7%	47.3%	64.3%	40.6%	43.9%	61.7%	68.0%
NBU is open and honest about company operations and policies	72.9%	54.9%	62.4%	51.5%	33.3%	39.0%	55.1%	35.1%	38.2%	54.2%	59.7%
NBU provides good service and value for the cost of utilities	73.9%	56.8%	63.7%	52.6%	34.7%	40.1%	58.4%	33.4%	36.9%	55.0%	60.9%
The conservation tips and advice NBU provides helps me save money on my utility bill	80.1%	72.3%	75.5%	40.8%	33.6%	35.8%	40.0%	31.0%	32.4%	50.5%	54.0%
Average	80.3%	67.3%	72.7%	56.6%	43.5%	47.5%	61.6%	41.3%	44.4%	56.6%	62.3%



Q1-8: To begin, I will read you a list statements about NBU. For each one please use a scale of one (1) to five (5) where one is “strongly disagree” and five is “strongly agree.”

Font color indicates statistical significance at a 95% confidence level compared to the previous year.

Satisfaction | Organizational Characteristics

NBU received an overall satisfaction rating of 43.9% in 2024, which is 17.8 percentage points lower than the Texas overall satisfaction rating of 61.7%.

Aggregate of "Somewhat agree - 04" and "Strongly agree - 05" responses without "don't know" responses

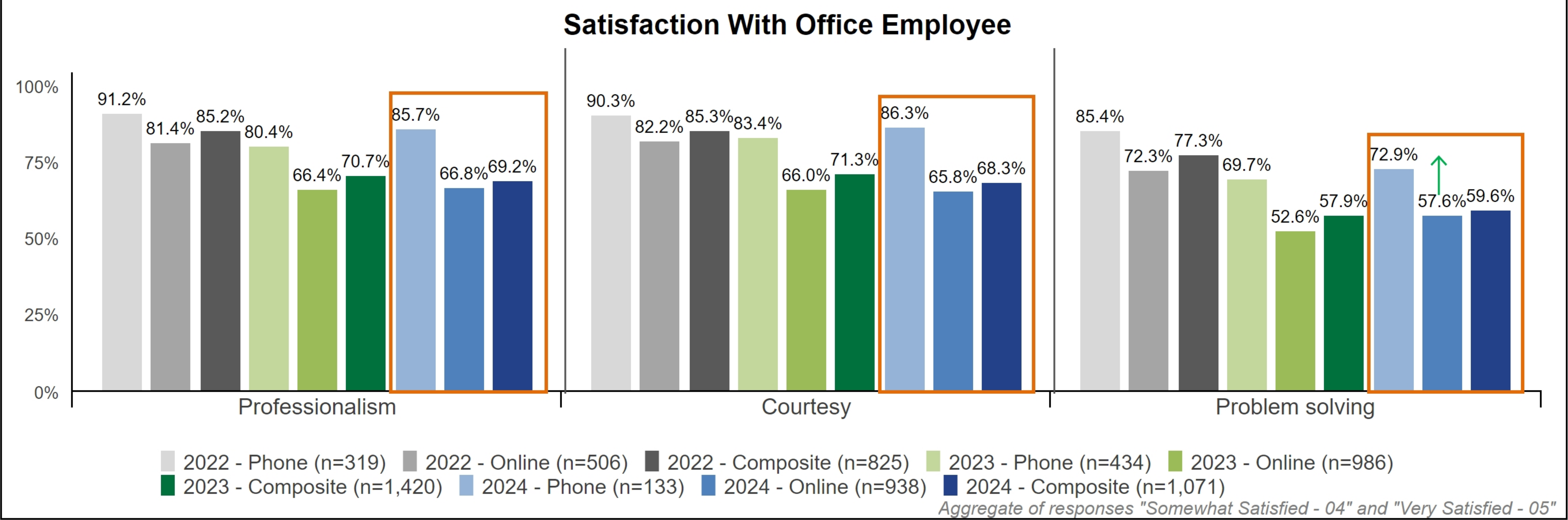
	2024				
	Phone	Online	Composite		
NBU does a good job communicating with customers	70.1%	44.6%	48.3%	60.4%	65.3%
NBU promptly responds to customer questions and complaints	66.2%	44.8%	48.2%	59.8%	65.7%
The conservation tips and advice NBU provides helps me save money on my utility bill	40.0%	31.0%	32.4%	50.5%	54.0%
NBU is open and honest about company operations and policies	55.1%	35.1%	38.2%	54.2%	59.7%
NBU provides good service and value for the cost of utilities	58.4%	33.4%	36.9%	55.0%	60.9%
NBU is involved in the community	66.2%	45.2%	48.7%	52.8%	59.3%
NBU's staff is helpful and knowledgeable	72.1%	55.9%	58.4%	58.6%	65.5%
I am satisfied overall with NBU	64.3%	40.6%	43.9%	61.7%	68.0%
Average	61.6%	41.3%	44.4%	56.6%	62.3%

 : 2023 Positive ratings for organizational characteristics among Texas public power utility customers via the Public Power Data Source tool

 : 2023 Positive ratings for organizational characteristics among National public power utility customers via the Public Power Data Source tool

Satisfaction | Office Employees

More than two-thirds of customers who engaged with NBU office personnel rated them positively for both courtesy and professionalism, which was consistent with 2023. Additionally, three-fifths of customers reported satisfaction with the problem-solving skills of NBU employees, which was a slight increase compared to 2023 (+1.7 percentage points).

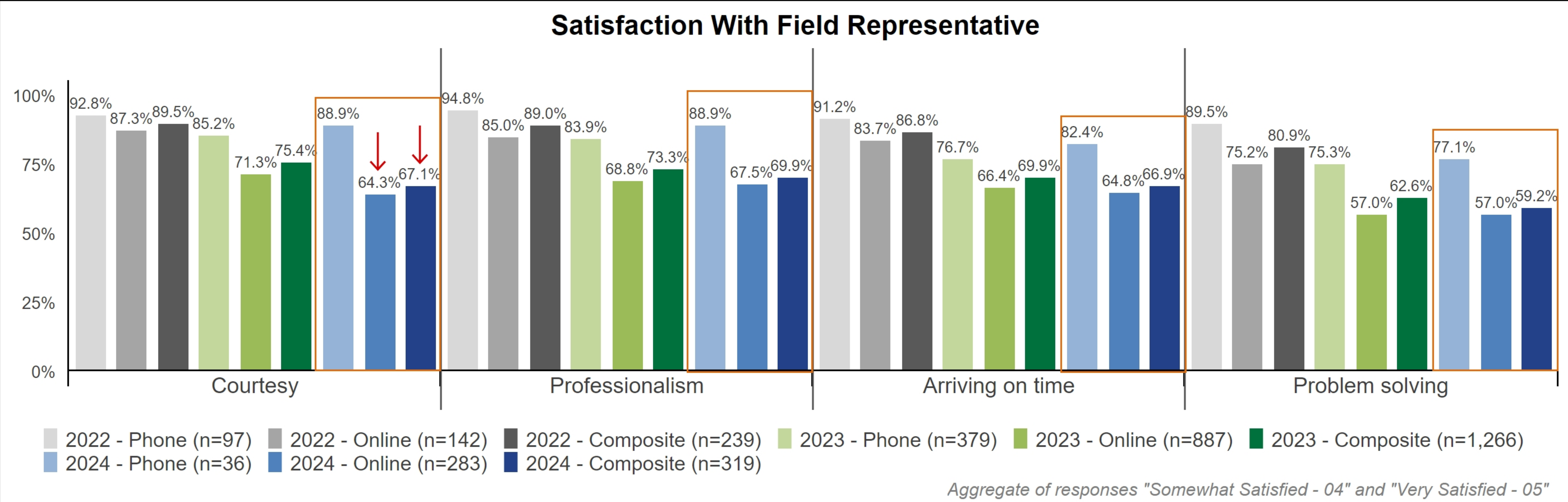


Q10: Please rate the NBU office employees you dealt with in the following areas of service. (Total "satisfied" w/o "don't know")

Arrows indicate statistical significance at a 95% confidence level, with the color and direction of the arrow denoting whether it is higher or lower than the previous year.

Satisfaction | Field Service Employees

Among customers who have had contact with a field representative in the last year, more than two-thirds rated the representative positively for their professionalism, courtesy, and punctuality. However, the rating for the field representatives' "courtesy" declined in 2024 (-8.3 percentage points).



Q13: Now, using the same one to five scale where one is "very dissatisfied" and five is "very satisfied," please rate the NBU employees you dealt with in the following areas of service. (Total "satisfied" w/o "don't know")

Arrows indicate statistical significance at a 95% confidence level, with the color and direction of the arrow denoting whether it is higher or lower than the previous year.

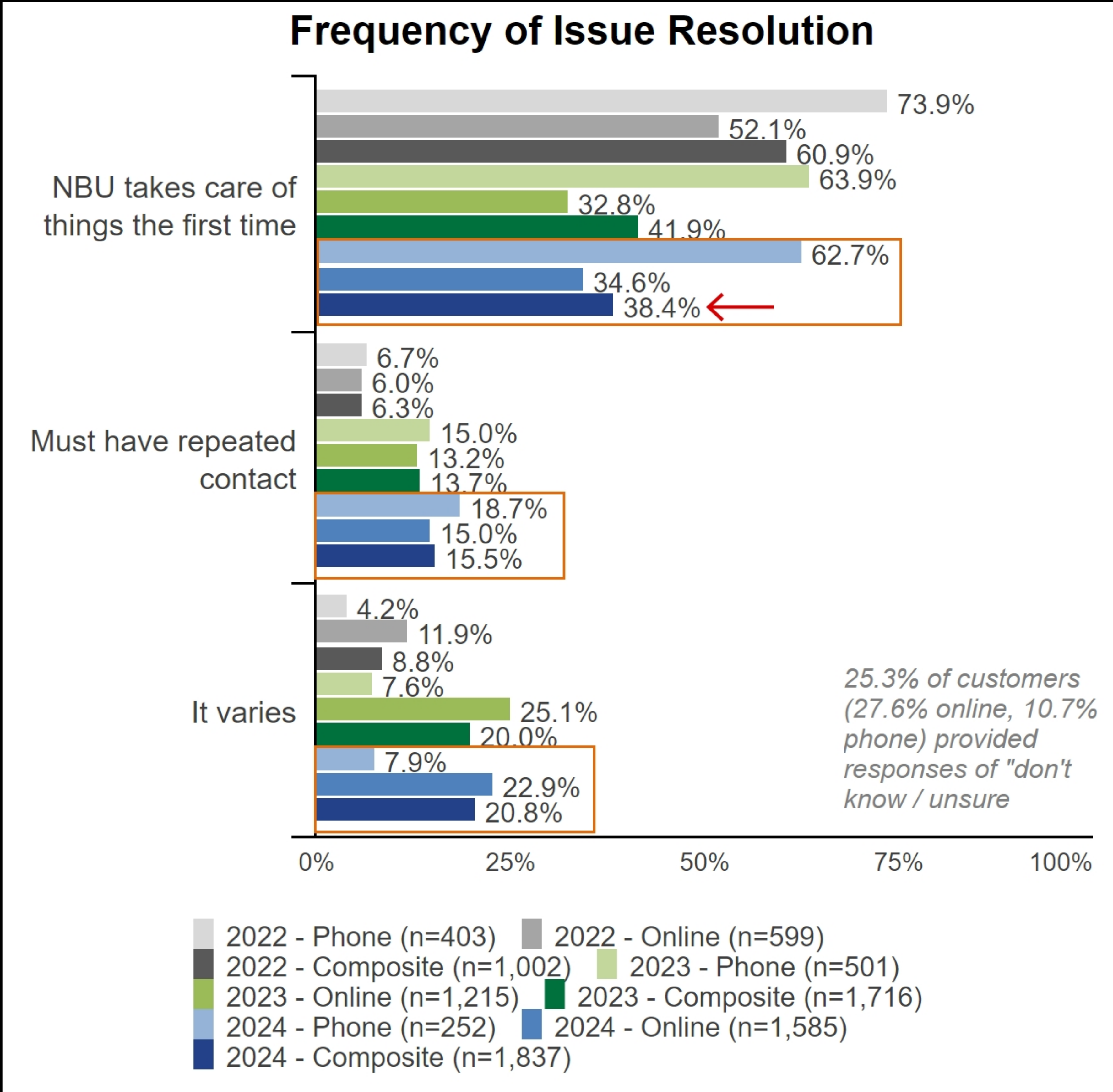
Satisfaction | Issue Resolution

In 2024, there was a significant decline in the frequency of residential customers reporting that NBU tends to resolve issues on the the first point of contact (-3.5 percentage points). This metric holds significance as 73.4% of customers who reported their issue was resolved on the first point of contact reported being satisfied with NBU overall, compared to the 9.2% overall satisfaction rating provided by customers who indicated they must have repeated contact with NBU before their issue is resolved.

73.4%

of residential customers (composite)

The percentage of customers who had their **issue resolved** on first contact that reported to be **“satisfied”** overall with NBU



Q15: Generally, when you contact NBU, are things taken care of to your satisfaction the first time, or must you have repeated contact with them?

Arrows indicate statistical significance at a 95% confidence level, with the color and direction of the arrow denoting whether it is higher or lower than the previous year.

Expectations | Services Received from NBU

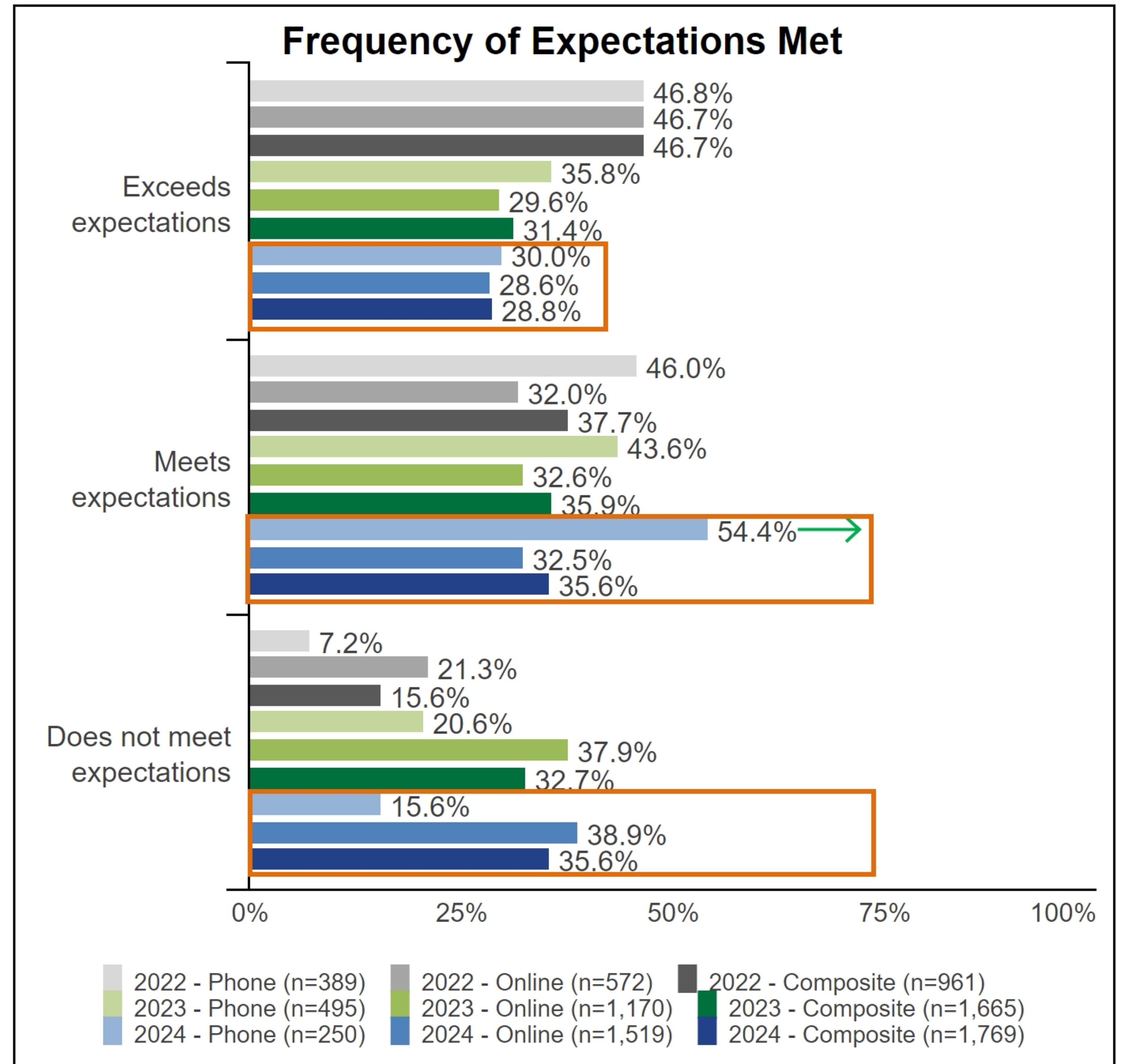
The top expectation among customers in 2024 was "low prices / fair pricing / cost savings," followed by "reliable / consistent service" and "clean water / safe water." One-quarter of customers reported NBU "exceeds expectations," (-2.6 percentage points), while over one-third of customers indicated NBU meets their expectations.

Top Expectations	2024		
	Phone	Online	Composite
Low prices/fair pricing/cost savings	40.9%	60.0%	57.4%
Reliable/consistent service	55.6%	38.0%	40.4%
Clean water/safe water	16.3%	37.8%	34.8%
Transparency/honesty/fairness	14.3%	26.3%	24.7%
Proper billing/easy to understand bill/prompt processing	10.7%	25.4%	23.4%

Top 5 responses shown

Q17: Everyone has expectations of the organizations they do business with over time. What are the top three expectations you have regarding the service you receive from NBU.

Q18: To what extent has NBU met your expectations? (w/o "don't know")



Expectations | Not met, Future Considerations

Among those respondents who indicated NBU has not exceeded their expectations, nearly one-third suggested NBU should offer "cost savings / lower prices / flexibility with payment" to exceed customer expectations in the future.

Others indicated NBU should "increase communication / more access to information" and "eliminate / reduce fees, charges and deposits."

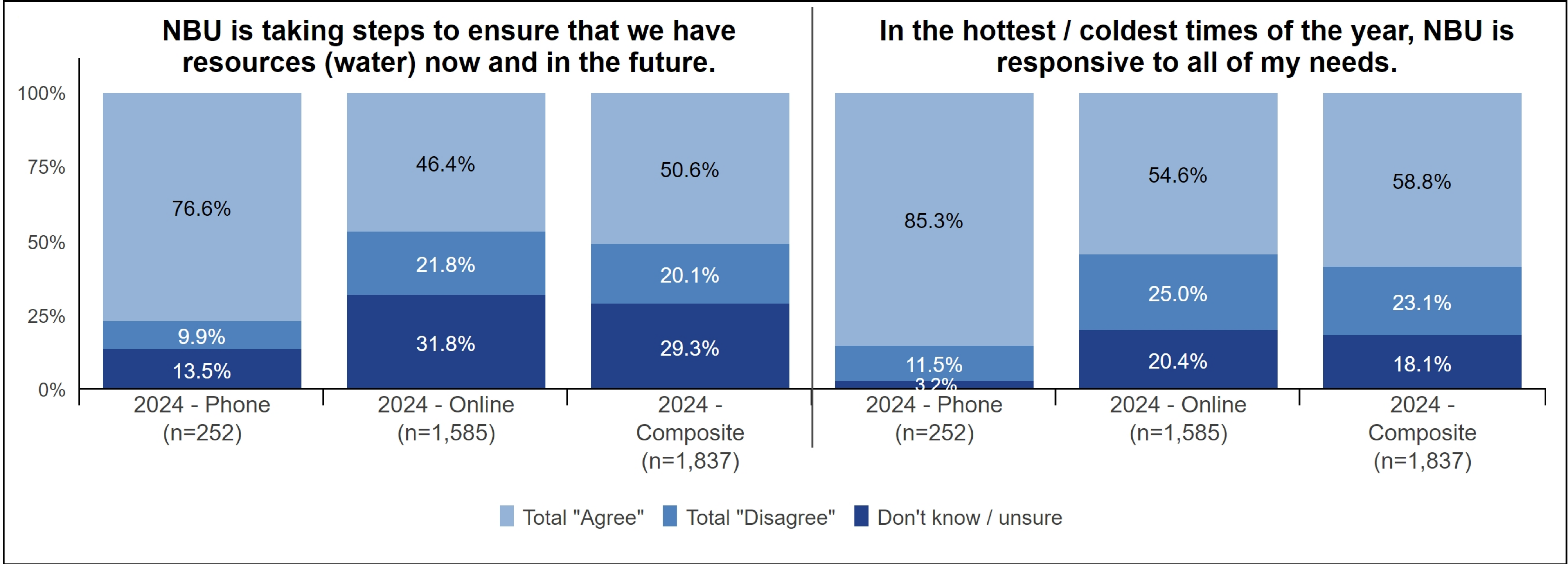
How to Exceed Expectations in the Future	2024		
	Phone	Online	Composite
<i>Sample size</i>	214	1341	1555
Cost savings/lower prices/flexibility with payment	26.6%	32.6%	31.8%
None/Nothing	12.6%	12.8%	12.7%
Expressed multiple concerns	7.0%	10.1%	9.6%
Keep up the good work/Fine as is	11.2%	5.8%	6.6%
Don't know/unsure/refused	6.1%	5.1%	5.2%
Increase communication/more access to information	5.6%	3.1%	3.5%
Eliminate / reduce fees, charges, deposits	2.3%	3.6%	3.4%
Proper billing/improved billing/better payment system	4.2%	3.2%	3.3%
Other	2.3%	2.9%	2.8%

Top 9 responses shown

Q19: If NBU has not exceeded your expectations, please tell me what is needed to exceed them in the future?

Water | Resource / Crisis Management

Nearly three-fifths of customers agreed NBU is responsive to all their needs during the hottest / coldest times of the year. Similarly, one-half of customers agreed NBU is taking steps to ensure that customers have resources both now and in the future.



Q20-21: Please indicate if you would strongly disagree, disagree, agree or strongly agree with each of the following statements regarding NBU's management of water resources and extreme weather:

Communication | Current vs. Preferred

Nearly one-half of customers look for information about NBU on its website, while over one-quarter rely on bill inserts for this information, and a similar frequency use social media. Over one-half reported a preference for contacting NBU by live phone call.

Current Method of Looking for Information about NBU

	2024		
	Phone	Online	Composite
Website	63.9%	43.2%	46.1%
Utility's bill inserts	11.5%	31.9%	29.1%
Social media	6.3%	28.1%	25.1%
Utility's newsletter/brochures	3.2%	20.3%	17.9%
Direct mail	5.6%	16.8%	15.3%
Direct contact	2.0%	11.2%	9.9%
Friends and co-workers	0.4%	10.4%	9.0%
Newspaper ads / stories	4.8%	7.3%	6.9%
Community organizations	1.2%	4.9%	4.4%
TV ads	0.8%	2.2%	2.0%

Top 10 responses shown

Q32: Please tell me where you currently look for information about NBU such as energy efficiency programs, rebates, and rate changes.

Q34: How do you prefer to contact NBU?

Preferred Method of Contacting NBU

	2024		
	Phone	Online	Composite
A live phone call	68.3%	51.8%	54.1%
Text message	9.5%	24.2%	22.2%
Website	7.9%	8.6%	8.5%
Email	6.0%	4.7%	4.8%
In-person	6.0%	3.7%	4.0%
Social media	0.4%	0.6%	0.5%
Other	1.2%	2.5%	2.3%
Don't know / Unsure	0.8%	3.8%	3.4%

Commercial Customers



Research Methodology | Commercial Snapshot

Methodology Digital / Telephone	No. of Completes 164 Total (38 Digital and 126 Telephone)	No. of Questions 27*	Incentive None	Sample Customer Sample
Target Commercial Customers	Quality Assurance Dual-level**	Margin of Error +/- 7.0%	Confidence Level 95%	Research Dates February 26 - March 26, 2024

* 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, in addition to computer-aided interviewing platform, ensure the integrity of the data is accurate.

Satisfaction | Organizational Characteristics

In 2024, commercial customers provided a slightly higher average positive rating of 61.2% for NBU’s organizational characteristics (+1.5 percentage points over 2023). The highest-rated characteristic for commercial customers was "NBU's staff is helpful and knowledgeable," which also saw a 1.5 percentage point increase over 2023. The most notable increase among organizational characteristics was for "NBU is open and honest about company operations and policies," which saw an increase of 6.5 percentage points over 2023.

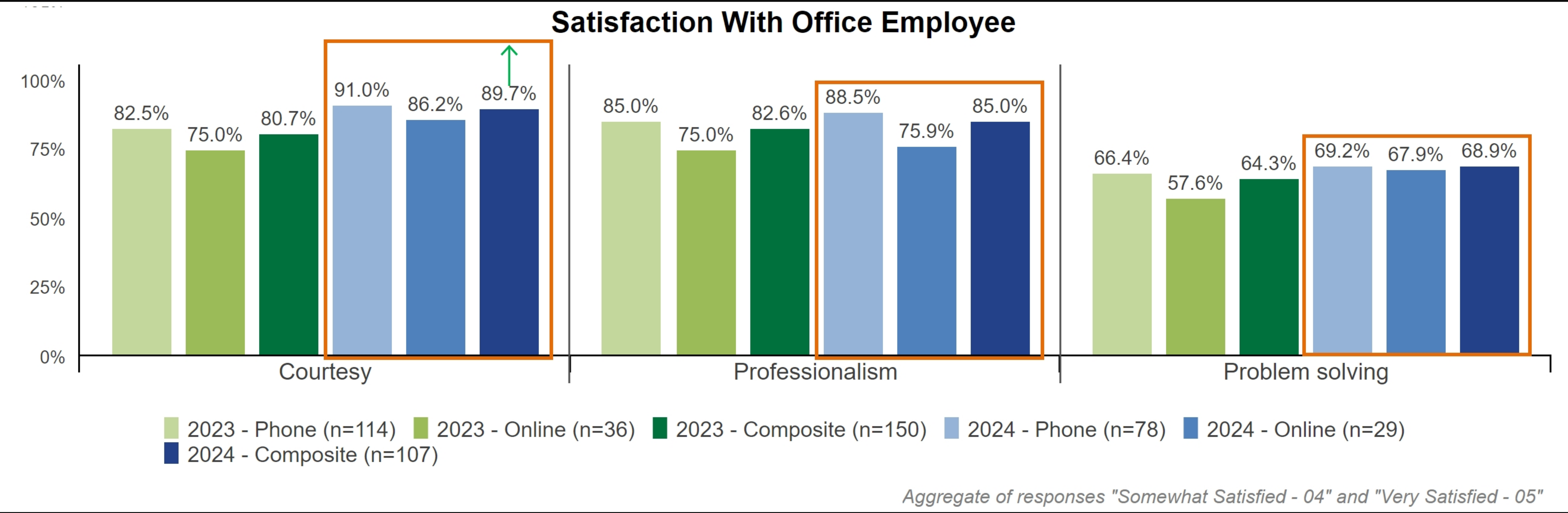
Aggregate of "Somewhat agree - 04" and "Strongly agree - 05" responses without "don't know" responses

	2023			2024		
	Phone	Online	Composite	Phone	Online	Composite
NBU’s staff is helpful and knowledgeable	71.9%	65.8%	70.4%	73.9%	64.7%	71.9%
NBU is involved in the community	72.2%	75.8%	73.1%	66.7%	72.4%	67.9%
NBU promptly responds to customer questions and complaints	67.5%	52.8%	64.1%	68.3%	60.0%	66.5%
I am satisfied overall with NBU	72.8%	39.0%	64.5%	68.0%	52.6%	64.4%
NBU does a good job communicating with customers	64.5%	57.9%	63.0%	65.3%	59.5%	64.0%
NBU is open and honest about company operations and policies	56.5%	37.1%	52.0%	61.7%	46.9%	58.5%
NBU provides good service and value for the cost of utilities	57.6%	41.0%	53.5%	57.9%	48.6%	55.8%
The conservation tips and advice NBU provides helps me save money on my utility bill	33.3%	47.1%	36.8%	39.4%	45.2%	40.7%
Average	62.0%	52.1%	59.7%	62.7%	56.2%	61.2%

Q1-8: To begin, I will read you a list statements about NBU. For each one please use a scale of one (1) to five (5) where one is “strongly disagree” and five is “strongly agree.” (w/o "don't know")

Satisfaction | Office Employees

Ratings for NBU's office personnel staffing showing "courtesy" increased significantly in 2024 (+9.0 percentage points), while customers also provided slightly higher ratings for the staff's "problem solving" abilities (+4.6 percentage points) and for showing "professionalism" (+2.4 percentage points).

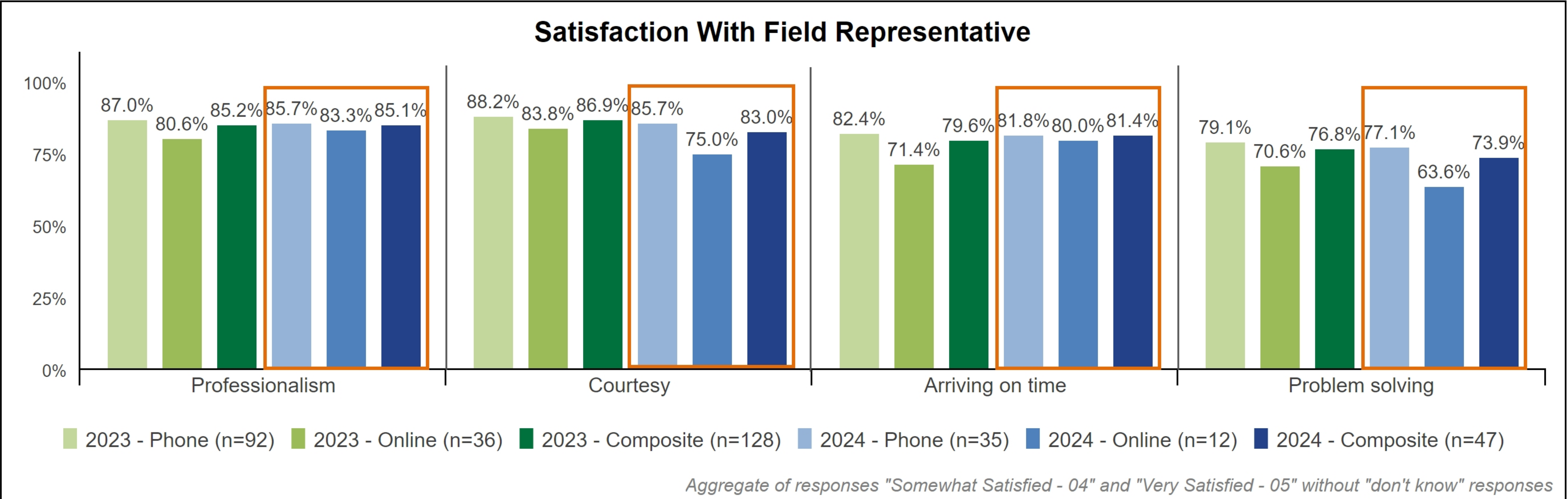


Q10: Please rate the NBU office employees you dealt with in the following areas of service. (Total "satisfied" w/o "don't know")

Arrows indicate statistical significance at a 95% confidence level, with the color and direction of the arrow denoting whether it is higher or lower than the previous year.

Satisfaction | Field Service Employees

Over four-fifths of customers provided positive ratings for NBU's field representatives demonstrating "professionalism" (85.1%), "courtesy" (83.0%) and "arriving on time" (81.4%). Further, there was a slight increase in the frequency of customers reporting that field representatives arrived on time compared to 2023 findings (+1.8 percentage points).



Q13: Now, using the same one to five scale where one is "very dissatisfied" and five is "very satisfied," please rate the NBU employees you dealt with in the following areas of service.

Satisfaction | Issue Resolution

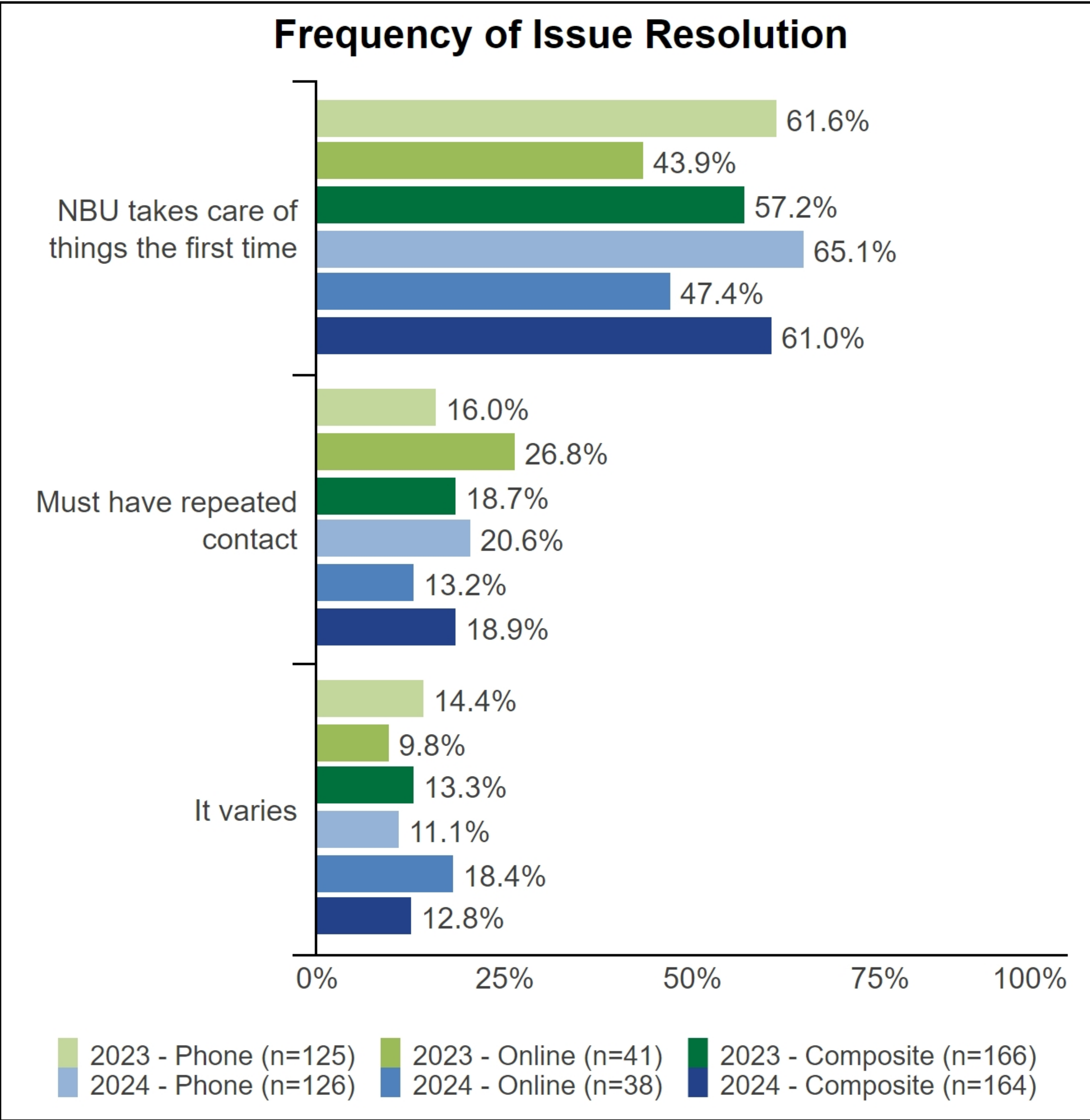
Over three-fifths of commercial customers reported that NBU tends to resolve issues on their first point of contact with the utility, which is 3.8 percentage point higher than 2023. This metric is crucial to track, as 82.8% of commercial customers who reported their issues were resolved on the first point of contact were also satisfied with NBU, compared to the overall satisfaction rating provided by those who require repeated contact for their issue to be resolved (25.8%).

82.8%

of commercial customers

The percentage of customers **who had their issue resolved** on first contact that reported to be **“satisfied”** overall with NBU

Q15: Generally, when you contact NBU, are things taken care of to your satisfaction the first time, or must you have repeated contact with them?

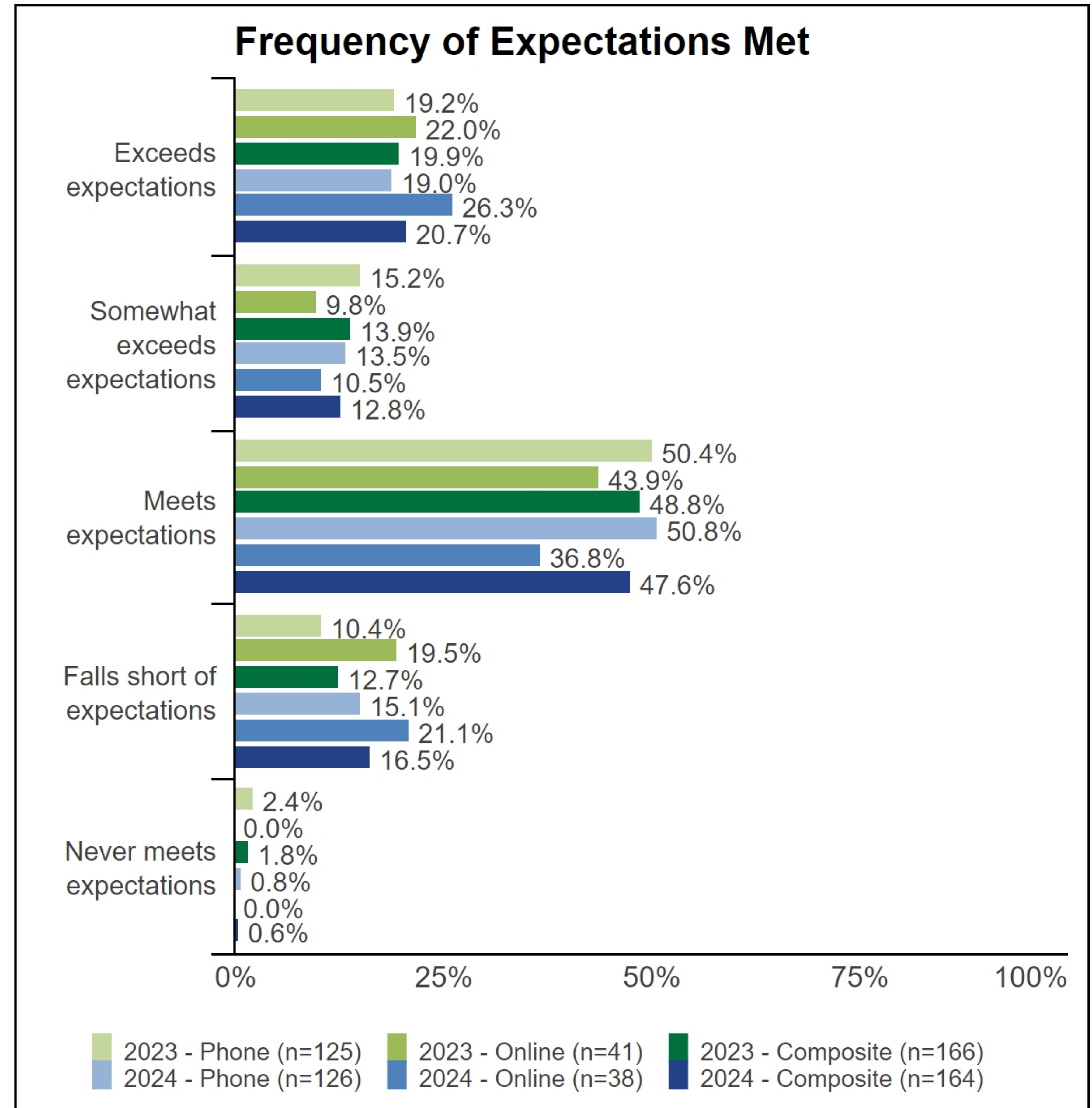


Expectations | Services Received from NBU

The top expectations among commercial customers included "reliable/consistent service," "low prices/fair pricing/cost savings," and "good customer service/availability to answer questions. One-third of commercial customers (33.5%) indicated NBU either exceeds or somewhat exceeds those expectations, which is consistent with 33.8% who reported the same in 2023. Additionally, nearly one-half of commercial customers reported NBU "meets expectations," which is also consistent with 2023 (48.8%).

Top Expectations	2024		
	Phone	Online	Composite
Reliable/consistent service	61.1%	34.2%	54.9%
Low prices/fair pricing/cost savings	38.1%	52.6%	41.5%
Good customer services/answer questions/be available	31.7%	21.1%	29.3%

Top 3 responses shown



Q15: Everyone has expectations of the organizations they do business with over time. What are the top three expectations you have regarding the service you receive from NBU? (w/o "don't know")

Expectations | Not met, Future Considerations

Among the 130 respondents who indicated NBU has not exceeded their expectations, nearly one-fifth suggested NBU should offer "cost savings / lower prices / flexibility with payment."

Additionally, others indicated NBU should have a "prompt response time" and "better customer service" in order to exceed their expectations in the future.

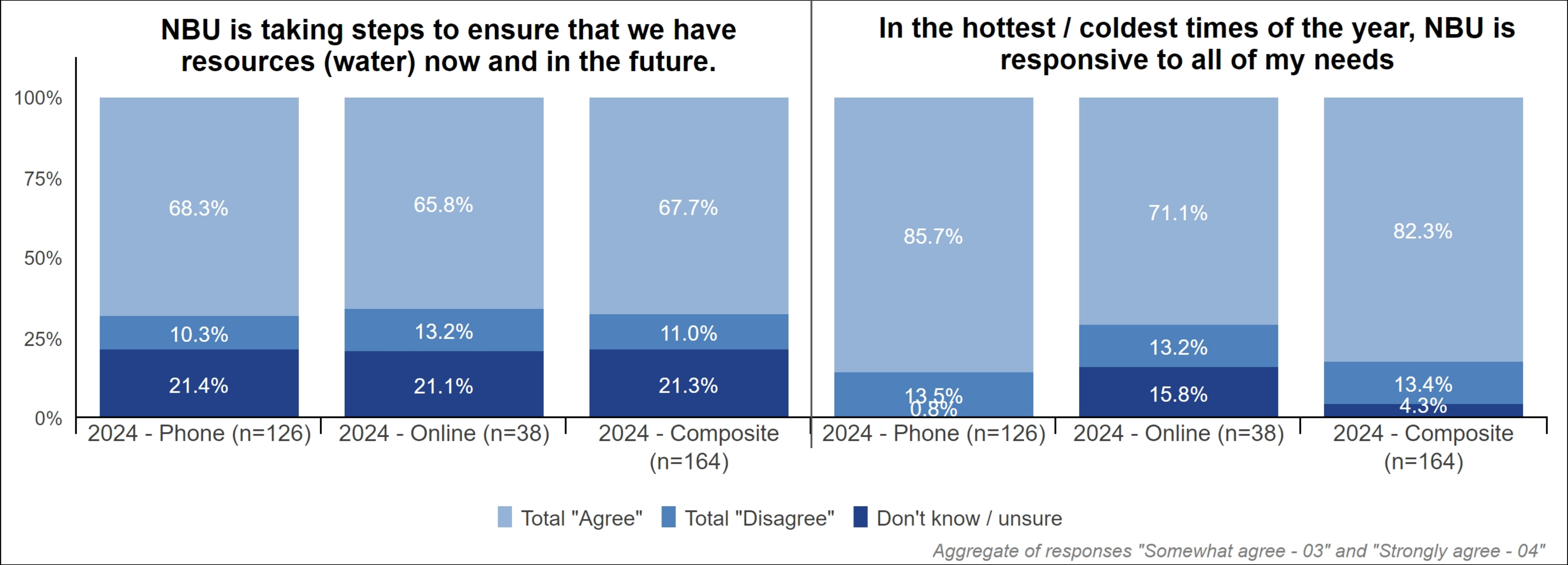
Ways to Exceed Expectations in the Future	2024		
	Phone	Online	Composite
<i>Sample size</i>	102	28	130
Cost savings/lower prices/flexibility with payment	16.7%	25.0%	18.5%
Keep up the good work/Fine as is	18.6%	3.6%	15.4%
None/Nothing	10.8%	14.3%	11.5%
Expressed multiple concerns	9.8%	10.7%	10.0%
Don't know/unsure/refused	8.8%	7.1%	8.5%
Prompt response time	6.9%	7.1%	6.9%
Better customer service	3.9%	14.3%	6.2%
Increase communication/more access to information	3.9%	3.6%	3.8%
Reliable utility service / fewer outages	3.9%	3.6%	3.8%
Increase water pressure, water levels/clean water	2.0%	3.6%	2.3%
Other	2.9%	0.0%	2.3%

Top 11 responses shown

Q19: If NBU has not exceeded your expectations, please tell me what is needed to exceed them in the future?

Water | Resource / Crisis Management

Over four-fifths of commercial customers agreed NBU is responsive to all their needs during the hottest / coldest times of the year. Additionally, approximately two-thirds of commercial customers agreed NBU is taking steps to ensure customers have resources both now and in the future.



Q20-21: Please indicate if you would strongly disagree, disagree, agree or strongly agree with each of the following statements regarding NBU's management of water resources and extreme weather:

Communication | Current vs. Preferred

Over three-fifths of commercial customers indicated they currently seek information about NBU on the website. When contacting NBU directly, nearly three-quarters prefer to do so through a live phone call.

Current Method of Receiving Information about NBU

	2024		
	Phone	Online	Composite
<i>Sample size</i>	126	38	164
Website	68.3%	44.7%	62.8%
None	14.3%	10.5%	13.4%
Social media	9.5%	26.3%	13.4%
Utility's bill inserts	9.5%	23.7%	12.8%
Direct contact	4.8%	18.4%	7.9%
Other	7.1%	5.3%	6.7%
Newspaper	3.2%	7.9%	4.3%
Utility's newsletter/brochures	0.8%	15.8%	4.3%
Direct mail	1.6%	10.5%	3.7%
Don't know / Unsure	1.6%	10.5%	3.7%

Preferred Method of Contacting NBU

	2024		
	Phone	Online	Composite
<i>Sample size</i>	126	38	164
A live phone call	81.7%	47.4%	73.8%
Text message	4.8%	28.9%	10.4%
Email	4.0%	10.5%	5.5%
Website	4.0%	2.6%	3.7%
In-person	3.2%	5.3%	3.7%
Don't know / Unsure	0.8%	5.3%	1.8%
Other	1.6%	0.0%	1.2%

Q32: Please tell me where you currently look for information about NBU such as energy efficiency programs, rebates, and rate changes.

Q34: How do you prefer to contact NBU?

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Considerations



Focus Communication on Community Outreach Activities & Conservation Efforts

In 2024, NBU saw a notable decline in overall satisfaction ratings among residential customers, with a significant 3.1 percentage point decrease in the average positive rating for NBU's organizational characteristics compared to the previous year. This decline encompasses key benchmarking characteristics such as community involvement, where there was a noticeable drop in satisfaction levels. To address decreased ratings in these areas, NBU should prioritize strengthening community engagement initiatives. With nearly two-thirds of customers not participating in NBU community outreach activities, and over two-fifths indicating this was because they were unaware of the events scheduled, there is an opportunity to better promote events and increase attendance of customers.

Additionally, refining communication strategies to more effectively convey the benefits of conservation efforts is crucial, especially considering the decline in positive feedback in this area. By implementing these targeted strategies, NBU can work towards regaining customer loyalty, ultimately enhancing the overall customer experience and satisfaction levels.



Expand Programs that Help Customers Reduce Bills

NBU customers have expressed that they find value in programs aimed at reducing their water or electric bills, indicating a strong desire for cost-saving opportunities. To capitalize on this interest and address customers' dissatisfaction with rates, NBU should strategically expand its existing programs to provide more comprehensive support and incentives for energy and water conservation. This expansion could include initiatives such as offering more rebates for energy-efficient appliances, and providing more resources for water-saving technologies like low-flow fixtures and irrigation systems. Additionally, NBU should prioritize educating customers about these programs through targeted communication campaigns, leveraging various channels such as the website, social media, text messages and direct mailings. By proactively addressing customers' concerns about rates and offering practical solutions to help them lower their utility bills, NBU can enhance customer satisfaction and foster a stronger sense of trust within the community.

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WHAT'S NEXT.



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