

2025 GreatBlue Survey – Optimized Approach

• June 26, 2025

NBU NEW BRAUNFELS
UTILITIES

2025 GreatBlue Optimization Strategy

- **Consolidated the survey to the Public Power Data Source (PPDS) 9 key benchmark questions and 3 demographic questions**
 - Removed non-essential and marketing-related questions to streamline survey content
 - Removed demographic question regarding gender
- **Expanded communication efforts to increase awareness and participation**
 - Issued two proactive customer communications announcing the survey launch, including one featuring a quote from CEO Ryan
 - Introduced a Spanish-language version of the survey, recognizing that one-third of the customer base are native Spanish speakers
- **Revised the survey methodology to improve digital communication response rates**
 - Enabled SMS (text message) responses for residential customers who have opted in
 - Implemented targeted phone outreach to customers aged 65 and older to increase representation.
 - Partnered with Great Blue to streamline survey result presentation
- **Collaborated with GreatBlue to streamline data analysis and reporting**
 - Prioritized top customer sentiment themes to focus on areas with the greatest impact.
 - Improved clarity in the presentation of survey results

Mission

Strengthening our community by providing resilient essential services



Vision

Be a trusted community partner dedicated to excellence in service



Core Values

Safety, Team, Integrity, Culture, and Stewardship





Report of Findings

2025 Residential & Commercial Customer Satisfaction Study

22 May 2025

Confidential & Proprietary

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Residential Results

Residential Results



2025 RESULTS

	2023	2024	VARIANCE	2025	VARIANCE
Satisfied overall with NBU	47.3%	43.9%	↓ 3.4%	54.8%	↑ 10.9%
Average satisfaction of organizational characteristics	47.5%	44.4%	↓ 3.1%	57.2%	↑ 12.8%



TEXAS UTILITY COMPARISON

	2024 NBU	2024 TEXAS	VARIANCE	2025 NBU	2025 TEXAS	VARIANCE
Satisfied overall with NBU	43.9%	61.7%	- 17.8%	54.8%	63.8%	↑ -9.0%
Average satisfaction of organizational characteristics	44.4%	56.6%	- 12.2%	57.2%	61.7%	↑ - 4.5%

Satisfaction | Year over Year & Public Power Data Source (PPDS) Comparison



- In 2025, residential satisfaction with NBU improved significantly, with overall satisfaction and average ratings across key service areas rising notably, driven by prompt response to customer questions and complaints, gains in community involvement and transparency.

Company characteristics NBU	2023	2024	2025	Difference		
NBU promptly responds to customer questions and complaints	50.5%	48.2%	63.4%	+15.2%	65.7%	68.4%
NBU is open and honest about company operations and policies	39.0%	38.2%	53.6%	+15.4%	61.6%	65.4%
NBU provides good service and value for the cost of utilities	40.1%	36.9%	49.1%	+12.2%	60.2%	65.7%
NBU is involved in the community	56.0%	48.7%	64.8%	+16.1%	61.4%	63.9%
NBU's staff is helpful and knowledgeable	60.6%	58.4%	67.3%	+8.9%	64.0%	70.0%
NBU does a good job communicating with customers	51.2%	48.3%	60.1%	+11.8%	61.0%	66.8%
The conservation tips and advice NBU provides helps me save money on my utility bill	35.8%	32.4%	44.4%	+12.0%	55.5%	59.2%
I am satisfied overall with NBU	47.3%	43.9%	54.8%	+10.9%	63.8%	72.3%
Average	47.5%	44.4%	57.2%	+12.8%	61.7%	66.5%



National data from the Public Power Data Source (PPDS)*



Texas data from the Public Power Data Source (PPDS)*

N= 1,716 (2023), 1,837 (2024), 3,289 (2025), 12,000 (PPDS Total), 903 (PPDS Texas)

*The Public Power Data Source (PPDS) is a residential electric customer satisfaction benchmarking tool that includes data from a wide range of public power utilities across the country. The data source is composed of public power utilities, reflecting a diverse mix of utility sizes, lines of service (i.e. electric, water, etc.), and customer demographics, providing a robust point of comparison for evaluating customer perceptions and performance trends.

% indicates a statistically significant difference at a 95% confidence level.

Aggregate of ratings 7-10 shown without "don't know / unsure" responses

Residential Study Findings

Open-end | Satisfaction Themes

- Compared to 2024, where dissatisfaction themes were prompt response times and community outreach these have shown meaningful improvements and are now satisfaction themes for 2025.

Reliability

- In 2025, customers consistently praised NBU for **dependable** water and electric service.
- Many customers appreciated NBU's **advance notifications** for outages and potential issues, like leaks.
- NBU is viewed as a **reliable provider** by customers, especially when compared to past experiences with other utilities.

Positive Customer Service Experience

- NBU staff were frequently described as **helpful, patient, and professional**.
- Customers valued **knowledgeable representatives** who resolved issues efficiently.
- Some customers noted that NBU proactively shared information about **beneficial programs** (specifically mentioning programs for seniors).

Fast / efficient / helpful service

- **Text message alerts** during outages or issues were especially well-received by customers.
- Customers felt that NBU **responded promptly** to service disruptions, even in non-emergency situations.
- Proactive communication with customers, such as **alerts for water leaks**, helped prevent problems and save money.
- ✓ Expressed confidence in the customer experience in the **time to complete transactions and issue resolution**.

Communications / Transparency

- Customers appreciated **outage notifications and frequent outage updates**.
- ✓ Ongoing efforts to engage residents through **proactive communication and public updates** have been well-received and contribute to stronger community relationships.

N= 3,289

Q: Do you have any additional comments you would like for us to know?

Open-end | Dissatisfaction Themes

- In 2025 customers consistently called out solar, solar generation credits as a desired service, waste management concerns and rapid growth. Rate concerns continue to be the most dissatisfied theme for 2023, 2024 and 2025.

✓ Rates / Monopoly

- The perception that NBU operates as a monopoly leads to concerns among customers about a **lack of rate competitiveness** and customer choice.
- Customers that have relocated from other areas with competitive utility options feel **limited and frustrated** by the inability to compare or choose providers.
- Some are considering alternative solutions, such as **solar to receive generation credit**, due to dissatisfaction with current pricing and lack of market alternatives.

Targeted Communications

- Customers request **additional education** on what matters to them such as ways to conserve, rebates and how to save money on their bills.
- Customers expressed the need for more **detailed alerts**, especially for irrigation restrictions and outage including service address, via channels like **text message** rather than relying on the website.
- Customers seek proactive communication about **system preparedness for extreme weather events** rather than reactive updates during crises.

Technology

- Customers report **issues with the website**, describing it as unreliable, outdated, and difficult to navigate for basic tasks such as updating personal information or viewing billing details.
- Customers expressed an interest in **improved functionality for payment processing** and easier account management.
- ✓ Some customers expressed a desire for technology / infrastructure to **support local energy generation such as residential solar contributions to the grid**.

✓ Waste Management*

- Customers are frustrated by **reduced recycling frequency** while rates remain unchanged, leading to a perception of decreased value.
- There are concerns about inconsistent or delayed garbage pickup and **poor coordination between NBU and city services**, resulting in confusion.

✓ Overdevelopment / Growth*

- Customers are concerned that **rapid community growth** is outpacing existing infrastructure, particularly water and utility resources.
- Customers expressed a need for **stricter oversight on development** and resource planning to ensure sustainability and service reliability.

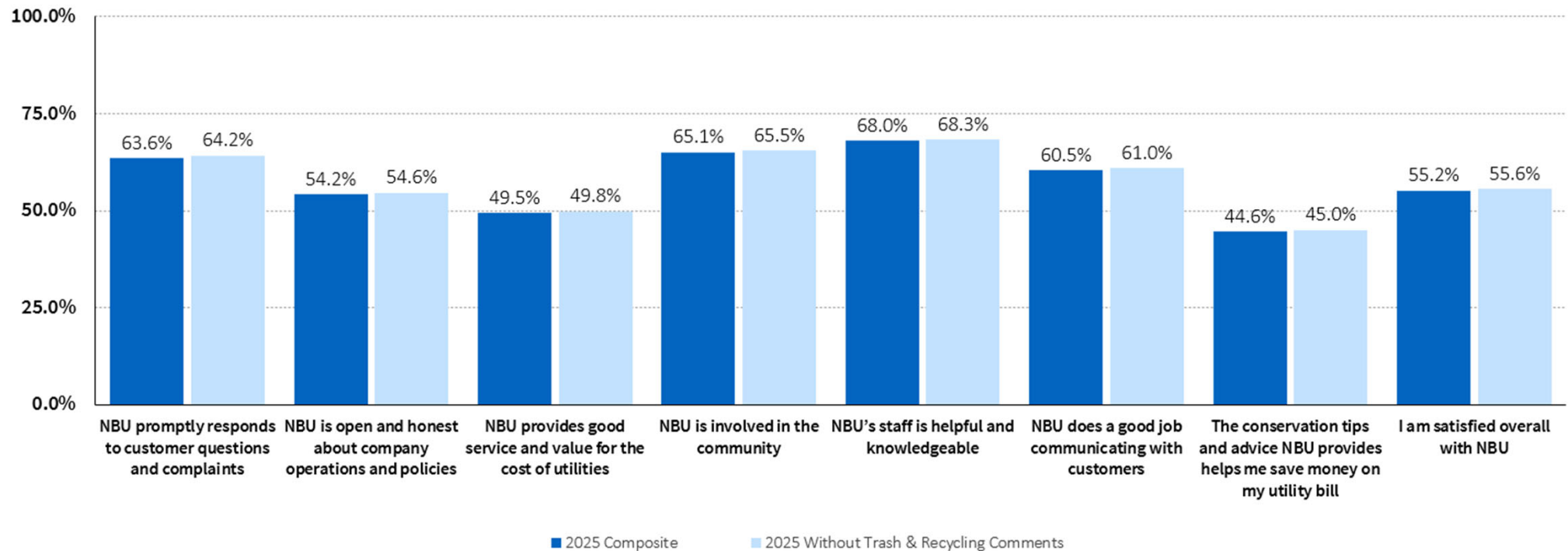
N= 3,289

Q: Do you have any additional comments you would like for us to know?

Satisfaction | Trash & Recycling Comments Excluded



In 2025, when looking at the difference in average positive satisfaction ratings among all customers and excluding those who cited concerns with “trash or recycling,” in the open-ended format, given NBU does not provide these services, customers provided consistent ratings across all organizational characteristics.



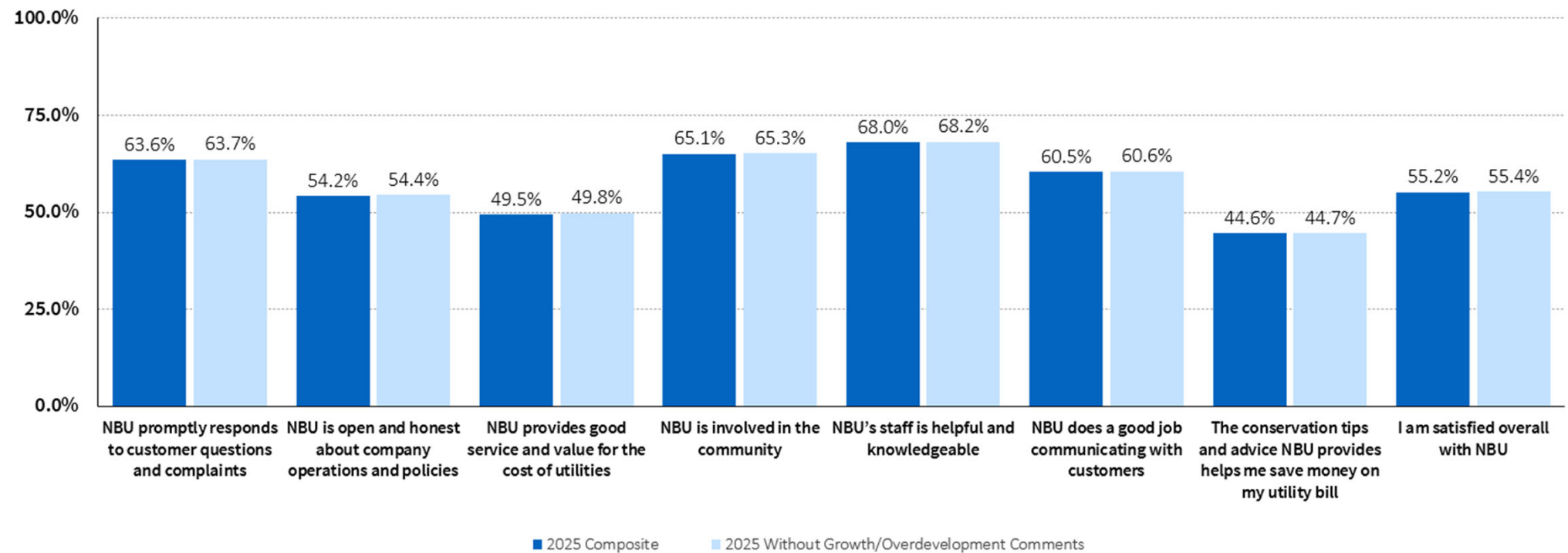
N= 3,476 (Composite), 3,410 (Without Trash & Recycling Comments)

Aggregate of ratings 7-10 shown without "don't know / unsure" responses

Satisfaction | Growth / Overdevelopment Comments Excluded



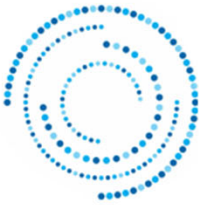
When looking at the difference in average positive satisfaction ratings among all customers and excluding those who cited concerns with “growth/overdevelopment,” in the open-ended format, customers provided consistent ratings across all organizational characteristics.



N= 3,476 (Composite), 3,429 (Without Growth/Overdevelopment Comments)

Aggregate of ratings 7-10 shown without "don't know / unsure" responses

Project Overview | Residential



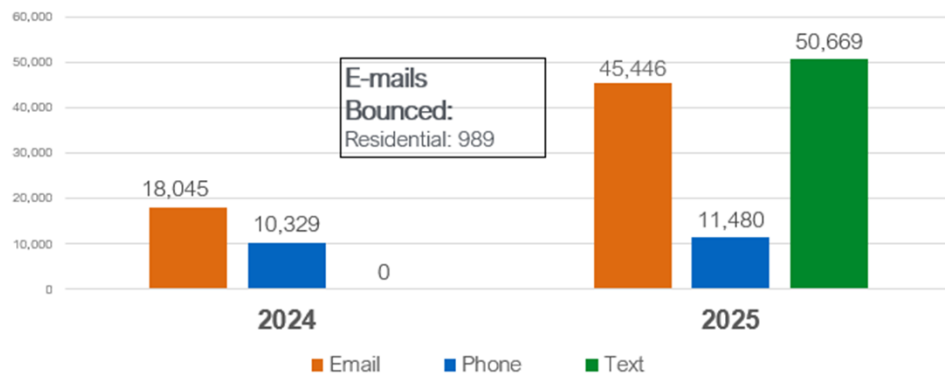
Methodology Email / Text / Phone	No. of Completes 3,289	No. of Questions 12	Incentive None	Sample Customer Sample
Target Residential	Quality Assurance Dual-level**	Margin of Error +/- 1.6%	Confidence Level 95%	Research Dates April 15 – May 13, 2025

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

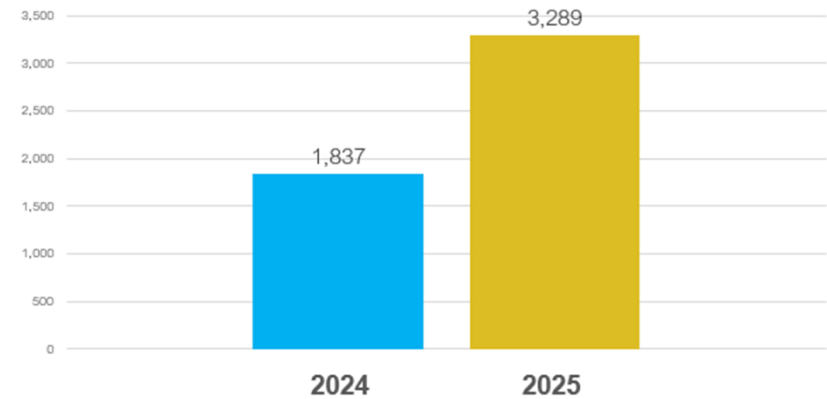
** Data quality personnel, in addition to computer-aided interviewing platform, ensure the integrity of the data is accurate.

Project Overview | Methodology

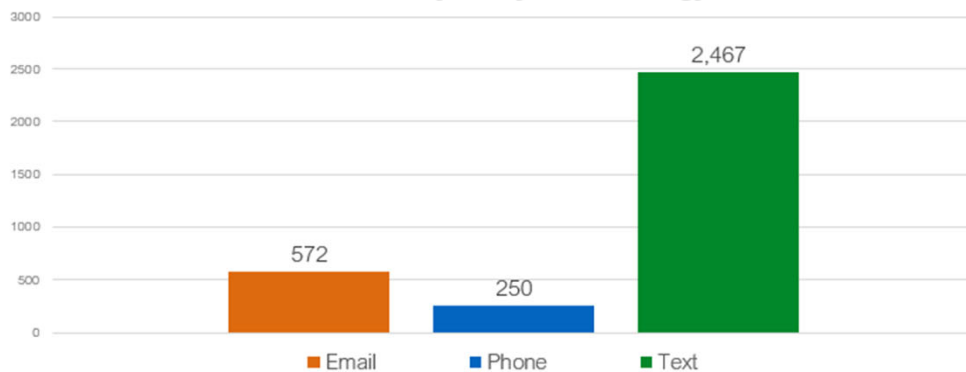
of Customers Contacted



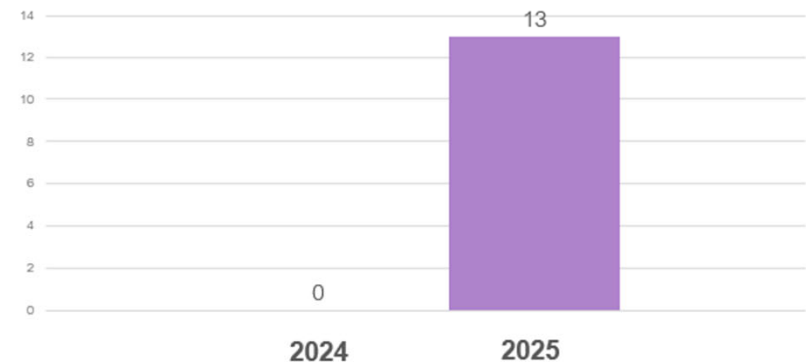
of Surveys Compared to Previous Year



2025 Surveys – By Methodology

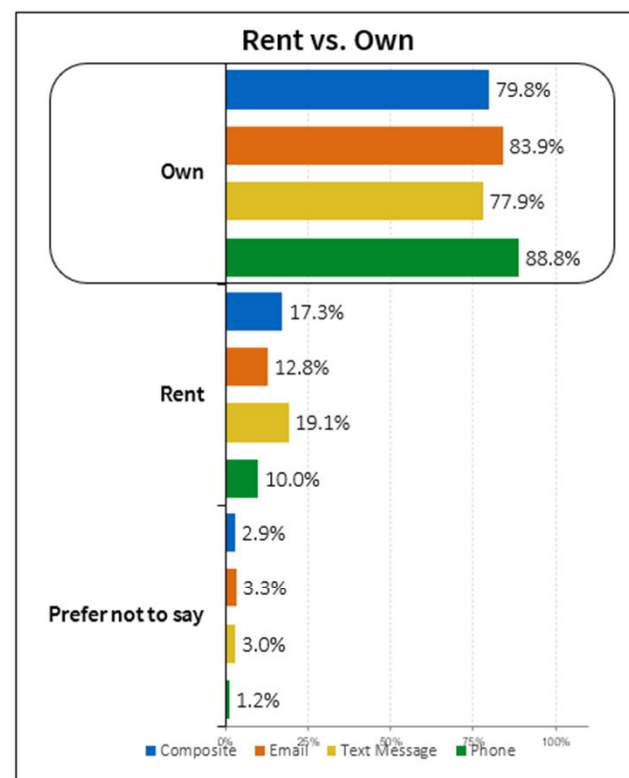
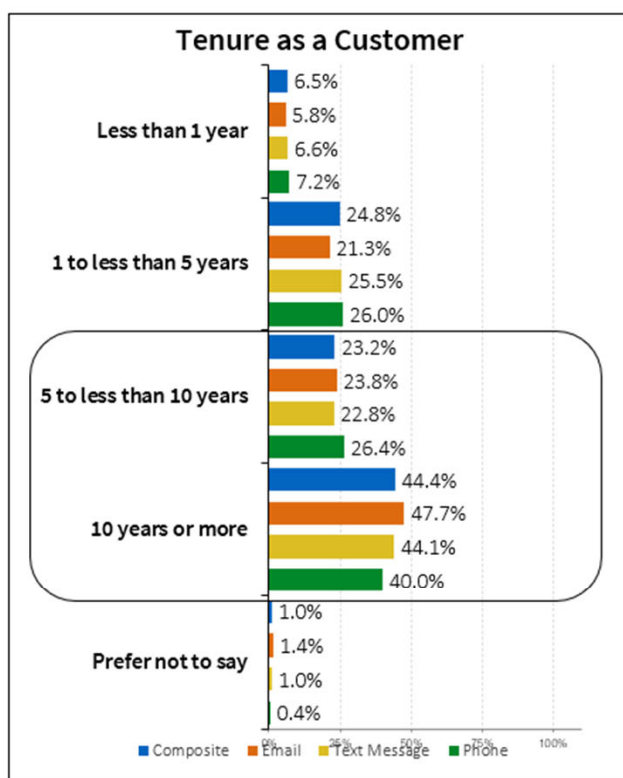
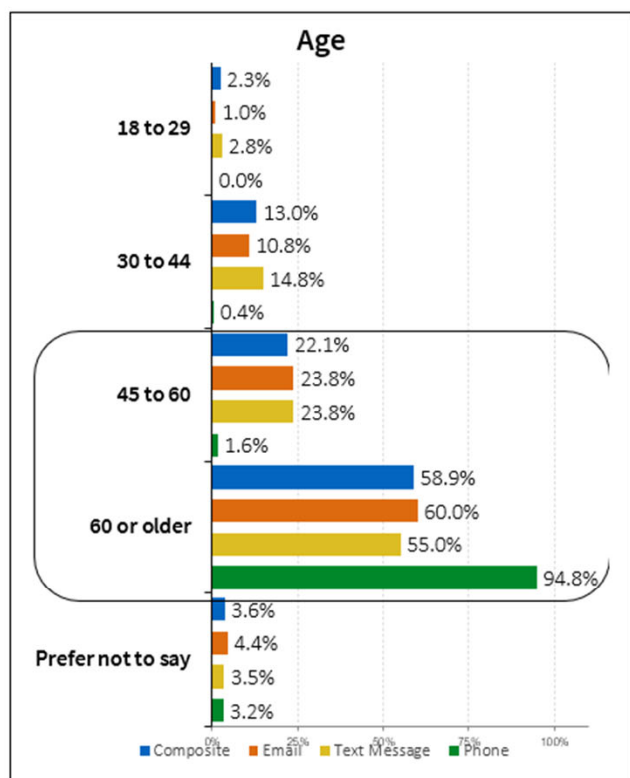


of Spanish Surveys



Respondent Profile | Residential Demographics

Over one-half of surveyed customers are 60 or older, while nearly one-quarter are between the ages of 45 and 60. Over two-fifths of customers have been NBU customers for 10+ years, while nearly one-quarter have been customers for 5-10 years. Of note, nearly eight-out-of-ten surveyed customers own their home.



N= 3,289 (Composite), 250 (Phone), 2,467 (Text Message), 572 (Email)

Commercial Results

Commercial Results

2025 RESULTS

	2024	2025	VARIANCE
Satisfied overall with NBU	64.4%	62.5%	↓ 1.9%
Average satisfaction of organizational characteristics	61.2%	64.3%	↑ 3.1%



TEXAS UTILITY COMPARISON

No data for 2024 to compare; data will be available next year through Public Power Data Source.

Satisfaction | Year over Year & PPDS (Public Power Data Source) Comparison



- Commercial customer satisfaction improved across most organizational attributes in 2025, with notable gains in perceptions of staff helpfulness and conservation support, despite a slight 1.9 percentage point decline in overall satisfaction.

Company characteristics NBU	2023	2024	2025	Difference		
NBU promptly responds to customer questions and complaints	64.1%	66.5%	67.3%	+0.8%	Can be used as benchmarks next year	Can be used as benchmarks next year
NBU is open and honest about company operations and policies	52.0%	58.5%	62.7%	+4.2%		
NBU provides good service and value for the cost of utilities	53.5%	55.8%	55.4%	-0.4%		
NBU is involved in the community	73.1%	67.9%	70.9%	+3.0%		
NBU's staff is helpful and knowledgeable	70.4%	71.9%	79.9%	+8.0%		
NBU does a good job communicating with customers	63.0%	64.0%	67.2%	+3.2%		
The conservation tips and advice NBU provides helps me save money on my utility bill	36.8%	40.7%	48.6%	+7.9%		
I am satisfied overall with NBU	64.5%	64.4%	62.5%	-1.9%		
Average	59.7%	61.2%	64.3%	+3.1%		



National data from the Public Power Data Source (PPDS)*



Texas data from the Public Power Data Source (PPDS)*

N= 166 (2023), 164 (2024), 187 (2025), 500 (PPDS – Public Power Data Source)

*Commercial data for the Public Power Data Source (PPDS) was piloted in Q1 2025.

% indicates a statistically significant difference at a 95% confidence level.

Aggregate of ratings 7-10 shown without "don't know / unsure" responses

Commercial Study Findings

Open-end | Satisfaction Themes

- Commercial customers expressed primarily the same satisfaction themes as residential customers. However, regarding communication, commercial customers emphasized transparency around NBU operations whereas residential customers valued communication about community involvement.

Reliability

- In 2025, customers consistently praised NBU for **dependable** water and electric service.
- Many customers appreciated NBU's **advance notifications** for outages and potential issues, like leaks.
- NBU is viewed as a **reliable provider** by customers, especially when compared to past experiences with other utilities.

Positive Customer Service Experience

- NBU staff were frequently described as **helpful, patient, and professional**.
- Customers valued **knowledgeable representatives** who resolved issues efficiently.
- Some customers noted that NBU proactively shared information about **beneficial programs** (specifically mentioning programs for seniors).

Fast / efficient / helpful service

- **Text message alerts** during outages or issues were especially well-received by customers.
- Customers felt that NBU **responded promptly** to service disruptions, even in non-emergency situations.
- Proactive communication with customers, such as **alerts for water leaks**, helped prevent problems and save money.
- ✓ Expressed confidence in the customer experience in the **time to complete transactions and issue resolution**.

Communications / Transparency

- Customers appreciated **outage notifications and frequent outage updates**.
- ✓ Commercial customers valued the **transparency around NBU operations**.

N= 187

Q: Do you have any additional comments you would like for us to know?

Open-end | Dissatisfaction Themes

- Commercial customers expressed primarily the same concerns as residential customers, however, Waste Management and Overdevelopment / Growth were not a key themes for Commercial Customers.

✓ Rates / Monopoly

- The perception that NBU operates as a monopoly leads to concerns among customers about a **lack of rate competitiveness** and customer choice.
- Customers that have relocated from other areas with competitive utility options feel **limited and frustrated** by the inability to compare or choose providers.
- Some are considering alternative solutions, such as **solar to receive generation credit**, due to dissatisfaction with current pricing and lack of market alternatives.

Targeted Communications

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Technology

- Customers report **issues with the website**, describing it as unreliable, outdated, and difficult to navigate for basic tasks such as updating personal information or viewing billing details.
- Customers expressed an interest in **improved functionality for payment processing** and easier account management.
- ✓ Some customers expressed a desire for technology / infrastructure to **support local energy generation such as residential solar contributions to the grid**.

N= 187

Q: Do you have any additional comments you would like for us to know?

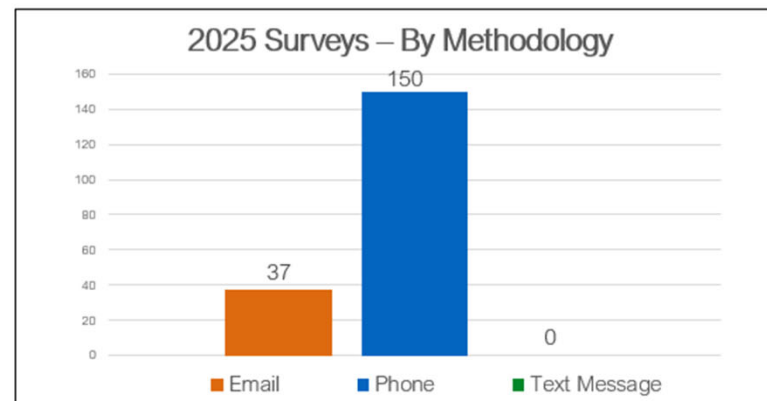
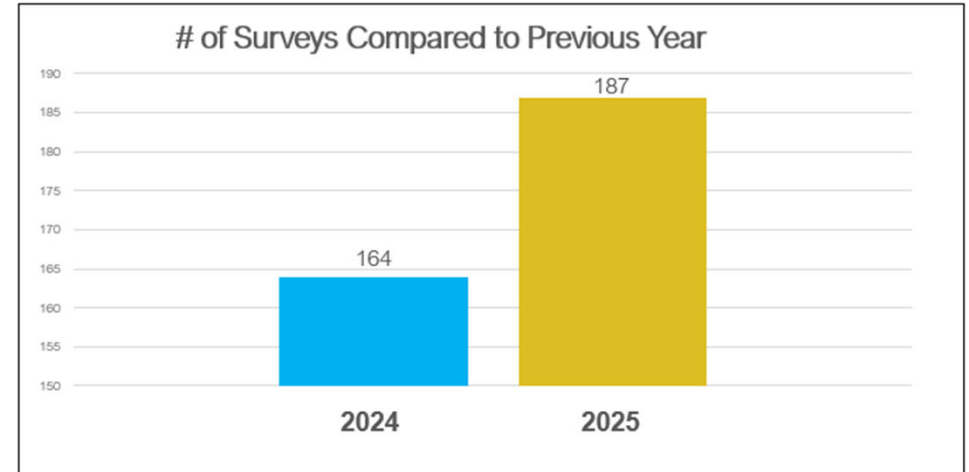
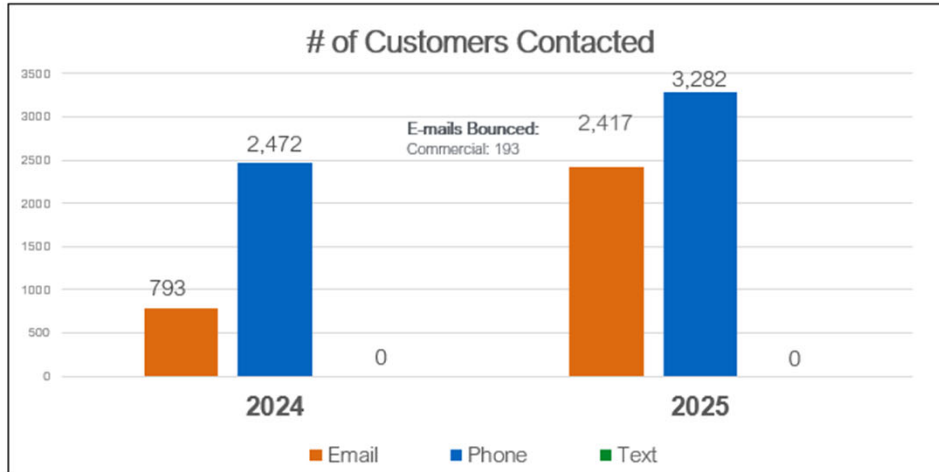
Project Overview | Commercial

Methodology Email / Phone	No. of Completes 187	No. of Questions 12	Incentive None	Sample Customer Sample
Target Commercial	Quality Assurance Dual-level**	Margin of Error +/- 7.1%	Confidence Level 95%	Research Dates April 15 – May 13, 2025

* 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.

Project Overview | Methodology



Respondent Profile | Commercial Demographics



Business Category	Composite
Property Management	20.9%
Retail	12.8%
Industrial	9.1%
Medical / Healthcare	7.5%
Service	5.3%
Food / Restaurant	3.7%
Construction	3.7%
Automotive	2.7%
Storage	2.1%
Commercial	2.1%
Accommodations / Lodging	1.6%
Beauty	1.6%
Real Estate	1.6%
Finance	1.6%
Educational Services	1.1%
Other	20.3%
Prefer not to say	2.1%

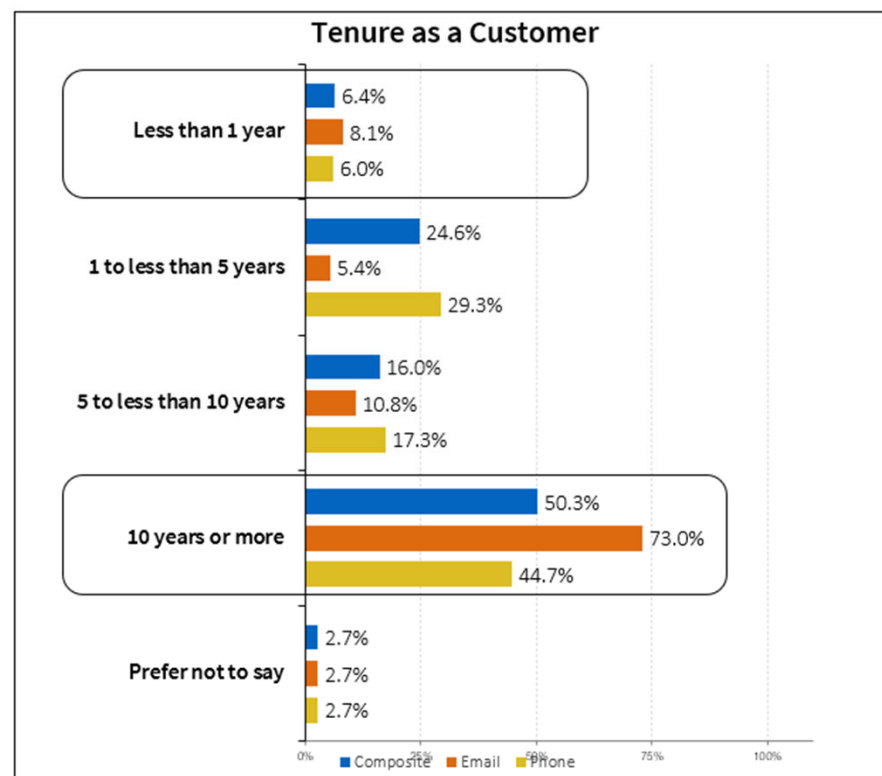
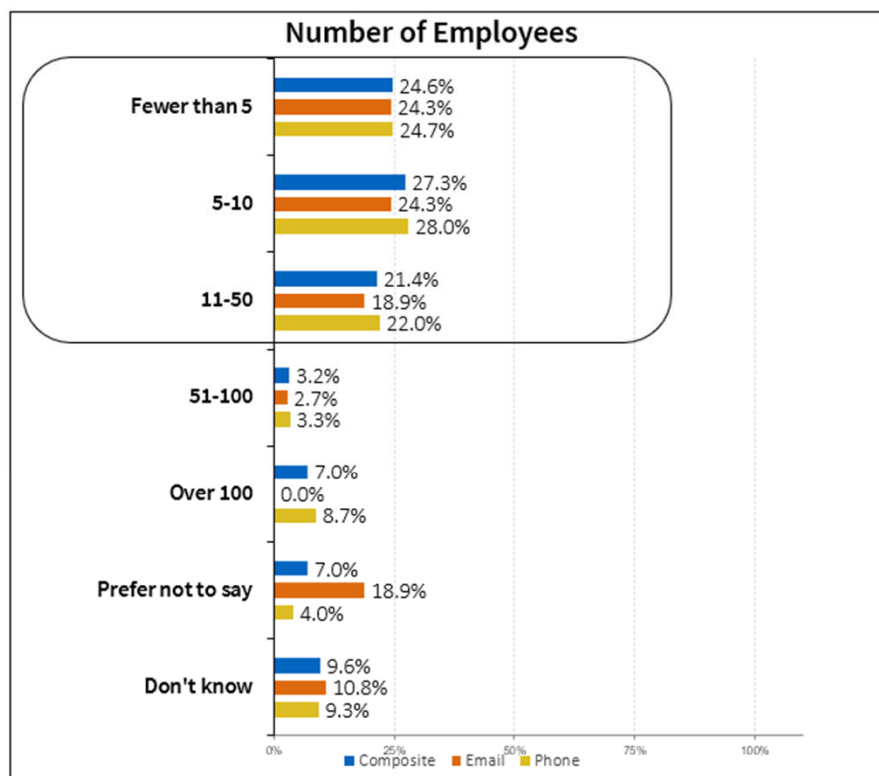
N= 187 (Composite), 150 (Phone), 37 (Online)

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Respondent Profile | Commercial Demographics



One-half of commercial respondents have been NBU customers for 10 or more years, while nearly one-third have been customers for less than 5 years. Nearly three-quarters of commercial respondents have fewer than 50 employees at their organization.



N= 187 (Composite), 150 (Phone), 37 (Online)

Combined Residential and Commercial Results

Satisfaction | Year over Year & Public Power Data Source (PPDS) Comparison



In 2025, surveyed residential and commercial customers as a whole provided an average positive rating of 57.6% when rating NBU on a series of organizational characteristics. Overall, customers provided the highest ratings for "NBU's staff is helpful and knowledgeable" and "NBU is involved in the community." **With Residential and Commercial combined NBU is up an additional +0.4%**

Company characteristics NBU	2025 Commercial & Residential	2025 Residential
NBU promptly responds to customer questions and complaints	63.6%	
NBU is open and honest about company operations and policies	54.2%	
NBU provides good service and value for the cost of utilities	49.5%	
NBU is involved in the community	65.1%	
NBU's staff is helpful and knowledgeable	68.0%	
NBU does a good job communicating with customers	60.5%	
The conservation tips and advice NBU provides helps me save money on my utility bill	44.6%	
I am satisfied overall with NBU	55.2%	54.8%
Average	57.6%	57.2%

Aggregate of ratings 7-10 shown without "don't know / unsure" responses

N= 3,476 (2025)

Considerations

Considerations

Performance Summary

Overall Satisfaction: Over one-half of residential customers rated their satisfaction with NBU positively in 2025, reflecting a **10.9 percentage point increase** from 2024. The overall average rating across key organizational characteristics rose by **12.8 percentage points**.

Recent Improvements from 2024

Faster Response Times: NBU achieved a **15% improvement** in response times among residential customers, enhancing confidence in the customer experience in the time to complete transactions and issue resolution.

Community Outreach Expanding: Ongoing efforts to engage residents - through **proactive communication and public updates** - have been well-received and contribute to stronger community relationships.

Considerations

Area for Continued Growth: Digital Experience

While phone-based service is highly rated, many customers continue to express frustration with digital tools and communication channels.

Key Areas to Improve:

- Website reliability and navigation
- Digital support
- Access to proactive weather-related status updates

Actionable Insights:

- Upgrade online account management tools (outage updates, billing clarity, service requests).
- Expand digital support for online services, with live chat or chatbot features.
- Provide status tracking for service requests and complaints.

Area for Improvement: Targeted Communication

Despite rising satisfaction with community outreach, there are still opportunities to improve targeted communications for what customers value the most.

Key Areas to Improve:

- Rate and rate structure education
- Perceived value of services

Actionable Insights:

- Educate customers proactively on rate structure, service offerings, and cost for the value of services.
- Increase promotion of rebate and financial assistance programs.
- Continue community partnerships to offer educational materials or workshops on conservation and bill management.

2025 GreatBlue Strategy - Plan going Forward

We made great progress from 2024 to 2025 – Continuing Our Commitment

- Further enhancement of the customer service experience through best-in-class wait times, proactive service offerings and high-quality resolution
- Ongoing implementation of the Communications Team's strategic plan, aligned with customer needs and expectations
- Sustained delivery of reliable and resilient services to our community
- Continue to foster a customer-centric culture by identifying and assessing opportunities for improvement at each touchpoint throughout NBU's customer lifecycle

What's Next:

- Partner with the Communications Team to develop and implement a comprehensive internal and external communication strategy, which will include an external publication of our survey results to promote transparency and reinforce our dedication to continuous improvement to our community.

GreatBlue Strategy for 2026:

- Propose revisions to the NBU Strategic Goal for Fiscal Years 26/27 in alignment with insights from the GreatBlue Survey
- Recommend the integration of Residential and Commercial survey data to support a more comprehensive and cohesive analysis

Mission

Strengthening our community by providing resilient essential services

+

Vision

Be a trusted community partner dedicated to excellence in service

+

Core Values

Safety, Team, Integrity, Culture, and Stewardship



Questions?

Mission

Strengthening our community by providing resilient essential services

+

Vision

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Safety, Team, Integrity, Culture, and Stewardship