



CUSTOMER OPINION SURVEY
SUMMARY REPORT

PREPARED FOR
SAN JUAN WATER DISTRICT



JUNE 2024



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INTRODUCTION

Established by a vote of citizens in 1954, San Juan Water District (District) provides reliable, high-quality water service to retail and wholesale customers in eastern Sacramento and southern Placer counties. On an annual basis, the District treats and delivers more than 40,000 acre-feet of water to approximately 150,000 residents and thousands of local businesses.

As part of its commitment to provide high quality water services that meet the varied needs of its customers, San Juan Water District regularly engages customers through community outreach, social media, and other communications activities and receives periodic feedback regarding its performance. Although these informal feedback mechanisms are a valuable source of information for the District in that they provide timely and accurate information about the opinions of *specific* customers, they do not necessarily provide an accurate picture of residential customers as a whole. Informal feedback mechanisms typically rely on the customer to initiate the feedback, which creates a self-selection bias. The District receives feedback only from those customers who are motivated enough to initiate the feedback process. Because these individuals tend to be those who are either *very* pleased or *very* displeased with their service, their collective opinions are not necessarily representative of residential customers in the District's service area as a whole.

PURPOSE OF STUDY The motivation for the current study was to design and employ a methodology that would avoid the self-selection bias noted above and thereby provide *statistically reliable* measures of residential customers' perceptions, opinions, and satisfaction as they relate to the District and the services it provides. Ultimately, the survey results and analyses presented in this report provide the District with information that can be used to make sound, strategic decisions in a variety of areas including measuring and tracking internal performance, planning, program development, community outreach, and budgeting. To assist in this effort, San Juan Water District selected True North Research to design the research plan and conduct the study. Broadly defined, the study was designed to:

- Measure residential customers' familiarity with San Juan Water District and their opinions of the District;
- Gauge customers' satisfaction with the water services their household receives;
- Profile customers' interactions with the District and their customer service experiences;
- Explore how customers view the District's communication efforts, as well as preferred methods of communication; *and*
- Gather relevant background and demographic information.

OVERVIEW OF METHODOLOGY A full description of the methodology used for this study is included later in this report (see *Methodology* on page 30). In brief, the survey was administered to a random sample of 519 residential customers who receive water services from the District. The survey followed a mixed-method design that employed multiple recruiting methods (email, text, and phone) and multiple data collection methods (phone and online). Administered in English and Spanish between June 13 and June 16, 2024, the average interview was 14 minutes in length.

STATISTICAL SIGNIFICANCE Many figures and tables in this report present the results of questions asked in 2024 alongside the results found in a prior survey (2018) for identical questions. In such cases, True North conducted the appropriate tests of statistical significance to identify changes that likely reflect actual changes in public opinion between the 2018 and 2024 surveys—as opposed to being due to chance associated with selecting two samples independently and at random. Differences between the two studies are identified as *statistically significant* if we can be 95% confident that the differences reflect an actual change in customer opinion. Statistically significant differences within response categories over time are denoted by the † symbol which appears in the figure next to the appropriate response value for 2024.

ORGANIZATION OF REPORT This report is designed to meet the needs of readers who prefer a summary of the findings as well as those interested in the details of the results. For those who seek an overview, the section titled *Key Findings* is for you. It provides a summary of the most important findings and a discussion of their implications. This section is followed by a more detailed question-by-question discussion of the results from the survey by topic area (see *Table of Contents*), and a description of the methodology employed for collecting and analyzing the data. For the truly ambitious reader, the full questionnaire is included at the back of this report (see *Questionnaire & Toplines* on page 33) and a complete set of crosstabulations for the survey results is contained in Appendix A.

ACKNOWLEDGEMENTS True North thanks San Juan Water District for the opportunity to conduct the study and for contributing valuable input during the design stage of this study. The collective experience, insight, and local knowledge provided by district representatives and staff improved the overall quality of the research presented here. A special thanks also to Lori Pro시오 and Lindsay Pangburn (Pro시오 Communications) for contributing to the design of the study.

DISCLAIMER The statements and conclusions in this report are those of the authors (Dr. Timothy McLarney and Richard Sarles) at True North Research, Inc. and not necessarily those of the District. Any errors and omissions are the responsibility of the authors.

ABOUT TRUE NORTH True North is a full-service survey research firm that is dedicated to providing public agencies with a clear understanding of the values, perceptions, priorities, and concerns of their residents and customers. Through designing and implementing scientific surveys, focus groups, and one-on-one interviews, as well as expert interpretation of the findings, True North helps its clients to move with confidence when making strategic decisions in a variety of areas—such as planning, policy evaluation, performance management, establishing fiscal priorities, passing revenue measures, and developing effective public information campaigns. During their careers, Dr. McLarney (President) and Mr. Sarles (Principal Researcher) have designed and conducted over 1,300 survey research studies for public agencies—including more than 500 studies for California municipalities, utilities, and special districts.



KEY FINDINGS

As noted in the *Introduction*, this study was designed to provide San Juan Water District with a statistically reliable understanding of customers' perceptions, opinions, and satisfaction as they relate to the District and the services it provides. Whereas subsequent sections of this report are devoted to conveying the detailed results of the survey, in this section we attempt to 'see the forest through the trees' and note how the collective results of the survey answer some of the key questions that motivated the research.

To what extent are customers familiar with San Juan Water District, and what are their opinions of the District?

Special districts and sub-agencies often operate in relative obscurity from the public's perspective. Although virtually all residents can identify their city and, to a lesser extent, their local school district, special districts or municipal sub-agencies are often not on the average resident's radar. It is for this reason that residential customers' familiarity with San Juan Water District stands out as exceptional, as three-quarters of respondents reported that they were either very familiar (33%) or somewhat familiar (42%) with the District, and an additional 20% indicated they were a little familiar with the District. Moreover, when compared to the 2018 survey results, there was a statistically significant increase (+7%) in the percentage of respondents who reported being very familiar with the District in 2024.

Of course, being familiar with San Juan Water District does not necessarily translate into having an *opinion* of the agency. That said, this is another area of good news for the District in 2024. Although the overall percentage of respondents with a favorable opinion of the District in 2024 matched that recorded in the 2018 survey (72%), the percentage that indicated they had a *very* favorable opinion of San Juan Water District was significantly higher (+7%) in 2024.

How well is San Juan Water District performing in meeting the needs of customers?

Residential customers are generally quite satisfied with San Juan Water District's efforts to provide water services to their households. Overall, 85% of customers indicated they were either very (50%) or somewhat (35%) satisfied with the District's performance in this respect, whereas just 9% were dissatisfied and 6% were unsure or unwilling to share their opinion. When compared with the findings of the 2018 study, there was also a statistically significant increase in the percentage *very* satisfied (+8%) in 2024.

Although satisfaction with their water services was widespread across customer subgroups, it was notably higher among those who primarily drink unfiltered tap water at home, residents of Folsom, those living in households earning at least \$60,000 annually, and Caucasians. Interestingly, satisfaction did not bear a consistent relationship to the amount of customers' bi-monthly water bills—meaning that those with comparatively high bills were just as satisfied with the District's performance as those with lower bills.

The high level of satisfaction expressed with San Juan Water District's performance *in general* was also mirrored in respondents' agreement with various performance-related statements, including *San Juan Water District does a good job of providing a reliable water supply* (94% strongly or somewhat agree), *The water pressure in my home is consistently strong* (86%), *The water we receive from San Juan Water District is safe to drink* (86%), *San Juan Water District provides adequate payment options* (71%), and *San Juan Water District keeps us well-informed about capital improvement projects, including improvements to the water treatment plant, pipelines and other portions of the water system, and how these improvements benefit customers* (70%).

How do customers rate San Juan Water District's customer service?

One of the objectives of this study was to profile the opinions of customers who had reason to contact San Juan Water District during the two years prior to taking the survey—focusing in particular on how they assess the customer service they received.

Approximately 41% of customers surveyed reported that they had contacted San Juan Water District during the two years prior to taking the survey, which is significantly lower than the 54% reported in the 2018 survey. Among customers in this group, 85% indicated they were satisfied with the service they received, with 61% indicating they were *very* satisfied. Moreover, San Juan Water District's customer service representatives were given high marks for their performance during these interactions, with more than eight-in-ten respondents rating their performance as excellent or good on every performance dimension tested including professionalism (92% excellent or good), courtesy (91%), timeliness (87%), competence (84%), knowledge (83%), and willingness to help (82%).

How well is San Juan Water District communicating with customers?

Keeping up with the challenge of communicating with customers has been difficult for many public agencies in recent years. As the number of information sources and channels available to the public have dramatically increased, so too has the diversity in where customers regularly turn for their information. Not only have entirely new channels arisen to become mainstream and nearly ubiquitous (e.g., social media), within these channels there exists a proliferation of alternative services. To add to the challenge, public preferences for information sources are also dynamic—subject to change as new services are made available while others may fade in popularity—making thorough, effective communication a *moving* target for public agencies.

Against this backdrop of challenges, the survey reveals that San Juan Water District appears to be doing a solid job communicating with residential customers, as nearly two-thirds (65%) of respondents indicated that the amount of information being provided by the District is about right. For those who were looking for *more* information from the

District, the most common topics of interest were future/current capital improvement projects (23%), costs/rate/billing (21%), water quality/water sources (18%), and conservation programs/rebates (18%).

Looking forward, customers were also clear about which methods would be the most effective for San Juan Water District to communicate with them in the future, with email (83% very or somewhat effective), water bill inserts (76%), electronic newsletters (71%), direct mailings separate from their water bill (69%), and the District's website (66%) topping the list of options.

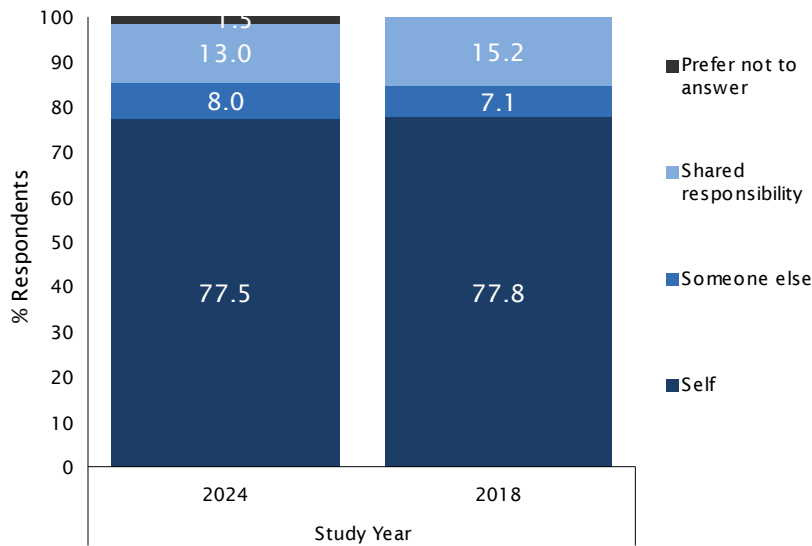
FAMILIARITY & SATISFACTION

The opening section of the survey was designed to measure customers’ familiarity with San Juan Water District, their opinions of the District, as well as their satisfaction with the District’s performance in providing water services.

WHO PAYS THE UTILITY BILLS? The first question in this series sought to understand the respondent’s role in paying their household’s utility bills. As shown in Figure 1, approximately nine-in-ten respondents in 2024 indicated that they pay their household’s utility bills (78%) or share that responsibility with someone else (13%). Just 8% of respondents indicated that they have no role in paying the utility bills for their household, while 2% preferred to not answer the question. The results of this question in 2024 match closely those found in the District’s prior survey (2018).

Question 1 *To begin, who typically pays the utility bills in your household? Is it you, someone else, or do you share that responsibility?*

FIGURE 1 HSLD MEMBER IN CHARGE OF PAYING UTILITY BILL BY STUDY YEAR



Figures 2-4 on the next page show how the responsibility for paying their household’s utility bills varied by the type of water they primarily drink at home, city of residence, gender, household income, the amount of their average bi-monthly water bill, age, and ethnicity. More than eight-in-ten respondents in *every* subgroup indicated they had either sole or shared responsibility for paying their household’s utility bills.

FIGURE 2 HSLD MEMBER IN CHARGE OF PAYING UTILITY BILL BY PRIMARY TYPE OF DRINKING WATER, CITY OF RESIDENCE & GENDER

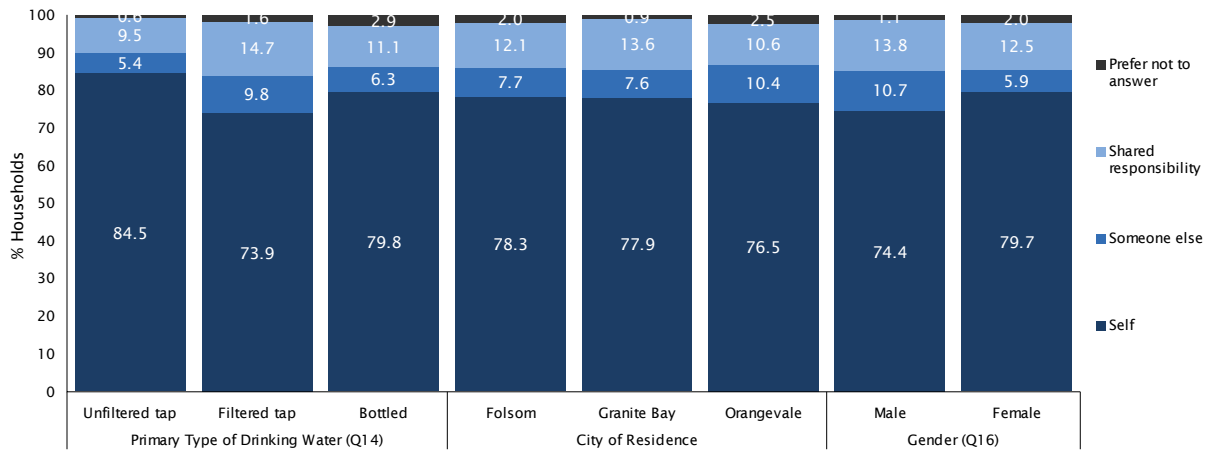


FIGURE 3 HSLD MEMBER IN CHARGE OF PAYING UTILITY BILL BY HSLD INCOME & AVERAGE BILL AMOUNT

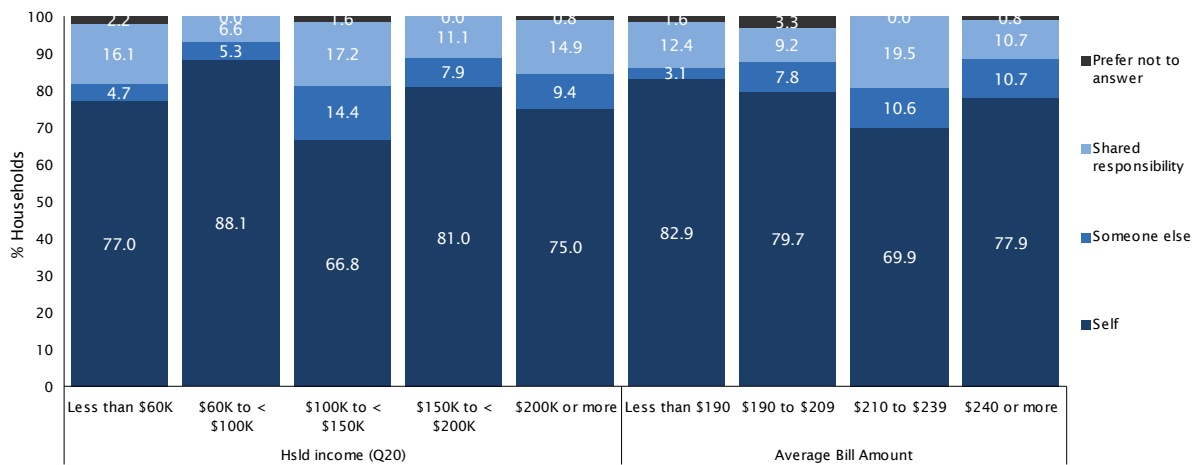
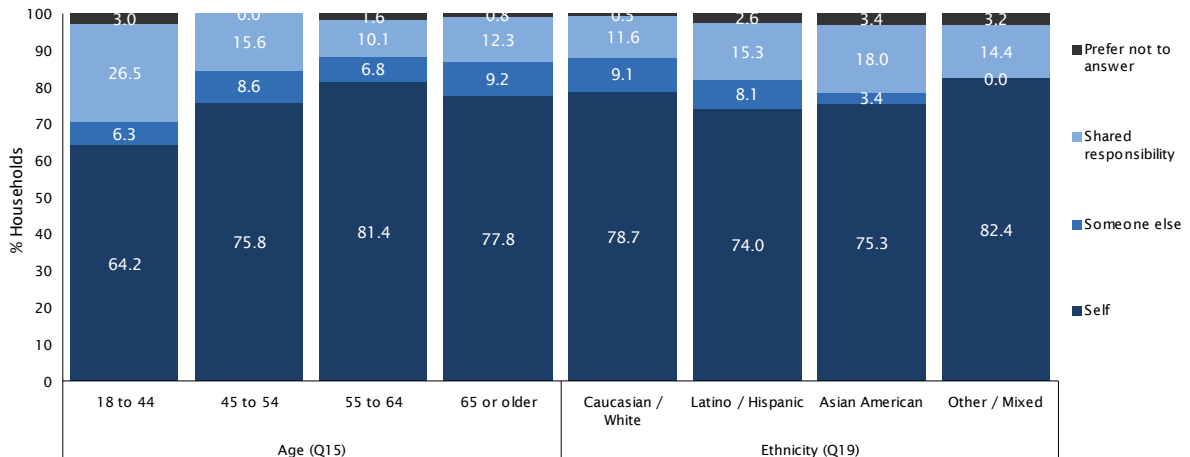


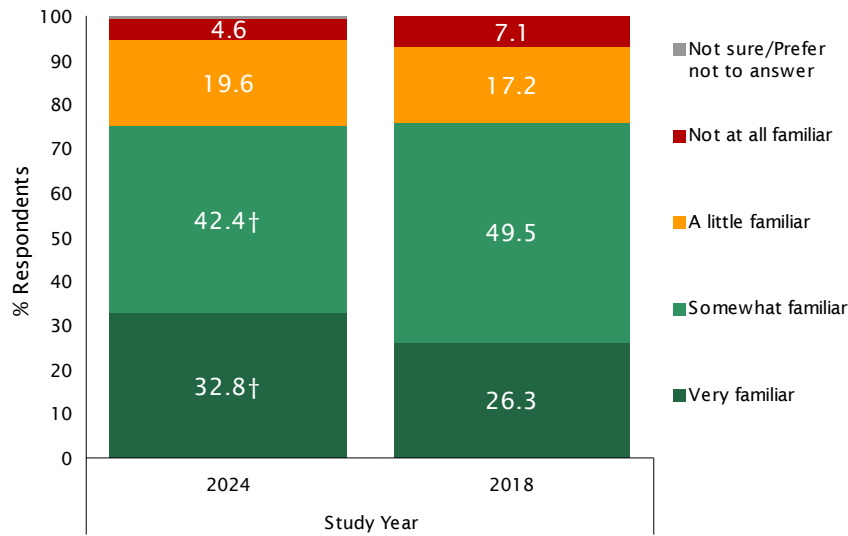
FIGURE 4 HSLD MEMBER IN CHARGE OF PAYING UTILITY BILL BY AGE & ETHNICITY



FAMILIARITY WITH SAN JUAN WATER DISTRICT Regardless of their role in paying their household’s utility bills, all respondents were next asked to describe their familiarity with the San Juan Water District. As shown in Figure 5, approximately three-quarters of respondents reported that they were either very familiar (33%) or somewhat familiar (42%) with San Juan Water District, and an additional 20% indicated they were a little familiar with the District. Just 5% of respondents stated they were not at all familiar with San Juan Water District, were unsure, or preferred to not answer the question. When compared to the 2018 survey results, there was a statistically significant increase in the percentage of respondents who reported being very familiar with the District, which was offset by a decline in the percentage who described themselves as somewhat familiar.

Question 2 *How familiar are you with the San Juan Water District? Would you say you are very familiar, somewhat familiar, a little familiar, or not at all familiar?*

FIGURE 5 FAMILIAR WITH SAN JUAN WATER DISTRICT BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2018 and 2024 studies.

When compared to their respective counterparts, individuals who primarily drink unfiltered tap water at home, residents of Granite Bay, males, seniors, and customers who identified as Caucasian or ‘other’ ethnicity were the most likely to report being at least somewhat familiar with San Juan Water District (see figures 6-8).

FIGURE 6 FAMILIAR WITH SAN JUAN WATER DISTRICT BY PRIMARY TYPE OF DRINKING WATER, CITY OF RESIDENCE & GENDER

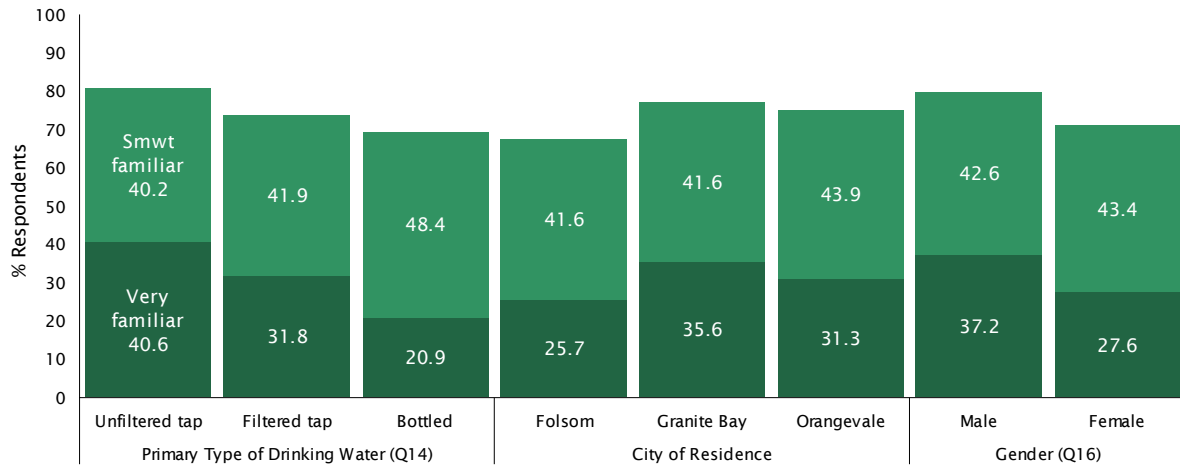


FIGURE 7 FAMILIAR WITH SAN JUAN WATER DISTRICT BY HSLD INCOME & AVERAGE BILL AMOUNT

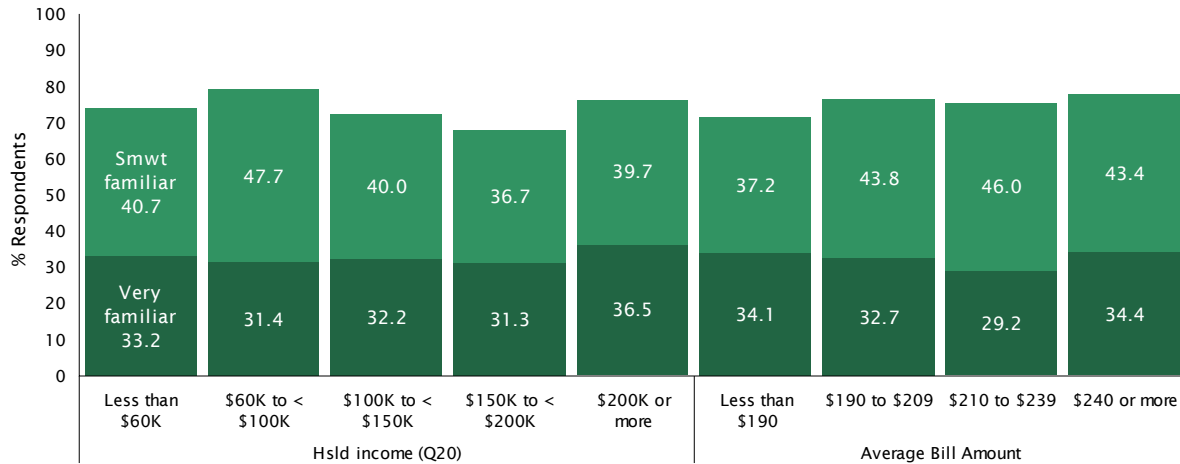
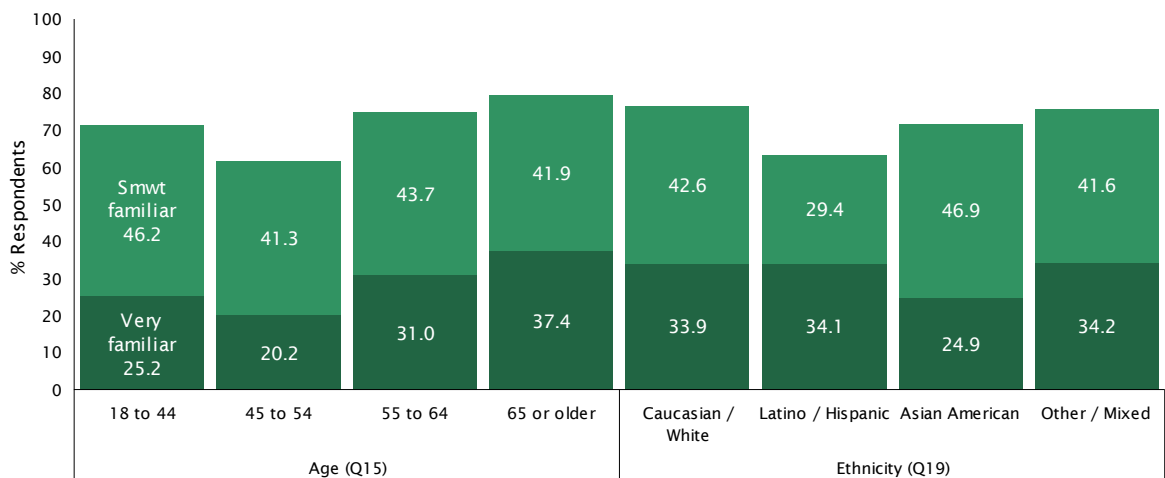


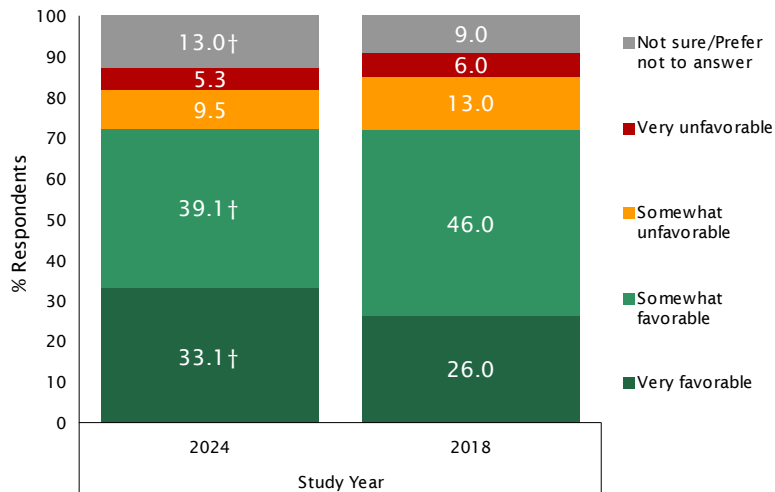
FIGURE 8 FAMILIAR WITH SAN JUAN WATER DISTRICT BY AGE & ETHNICITY



FAVORABILITY Respondents who indicated they were at least a little familiar with San Juan Water District were subsequently asked whether they held a favorable or unfavorable opinion of the District. Overall, more than seven-in-ten customers indicated they had a very favorable (33%) or somewhat favorable (39%) opinion of San Juan Water District in 2024, whereas 15% offered an unfavorable opinion and 13% were unsure (Figure 9). Although the overall percentage of respondents with a favorable opinion of the District in 2024 matched that recorded in the 2018 survey, the percentage that indicated they had a *very* favorable opinion of San Juan Water District was significantly higher in 2024. Figures 10-12 demonstrate that those who primarily drink unfiltered tap water at home, residents of Folsom, males, customers 50+ years of age, and Asian Americans were the most likely among their peers to report having a favorable opinion of San Juan Water District. It is also noteworthy that opinions of the District were not systematically related to the amount of customers' bi-monthly water bills.

Question 3 *Do you have a favorable or unfavorable opinion of the San Juan Water District?*

FIGURE 9 OPINION OF SAN JUAN WATER DISTRICT BY STUDY YEAR



† Statistically significant change (p < 0.05) between the 2018 and 2024 studies.

FIGURE 10 OPINION OF SAN JUAN WATER DISTRICT BY PRIMARY TYPE OF DRINKING WATER, CITY OF RESIDENCE & GENDER

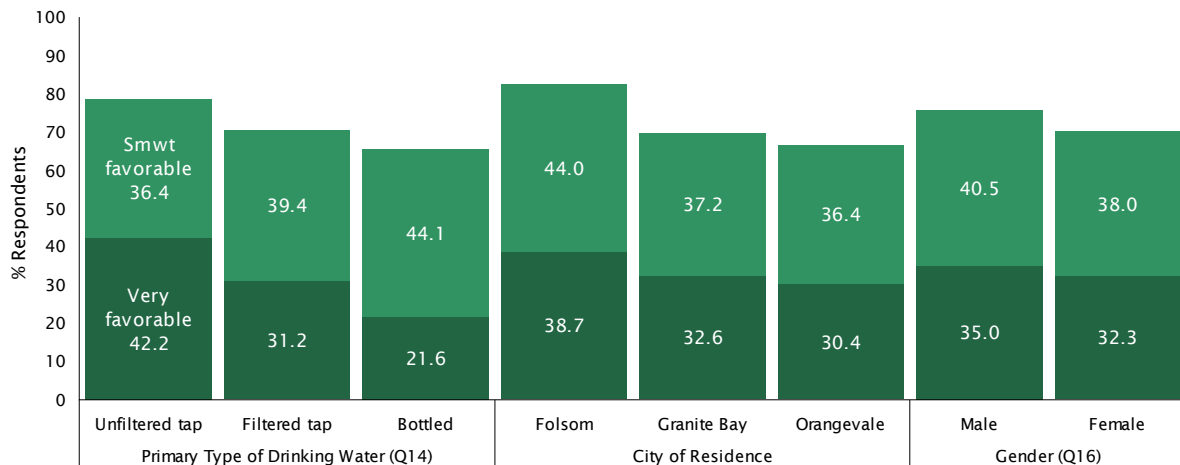


FIGURE 11 OPINION OF SAN JUAN WATER DISTRICT BY HSLD INCOME & AVERAGE BILL AMOUNT

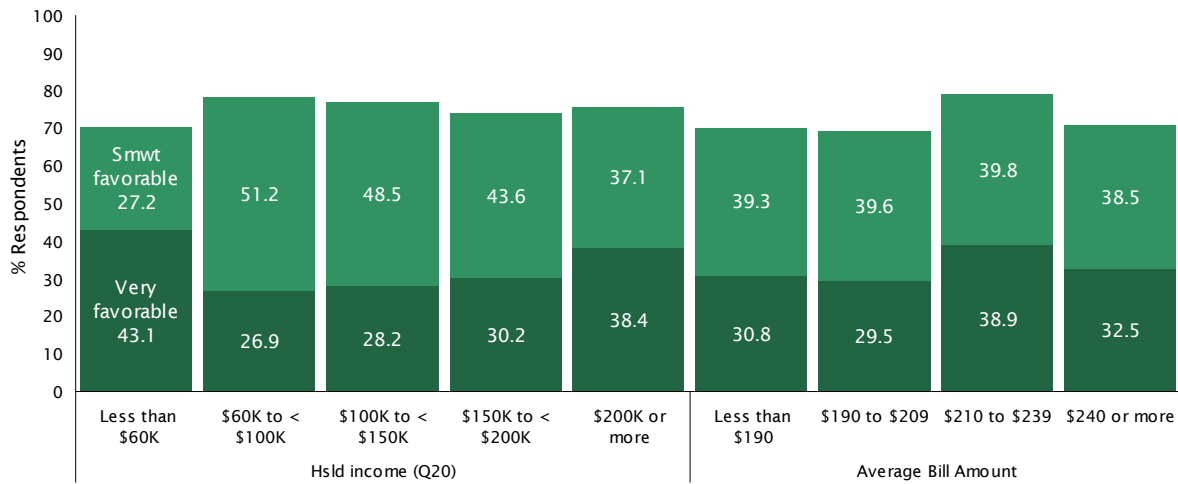
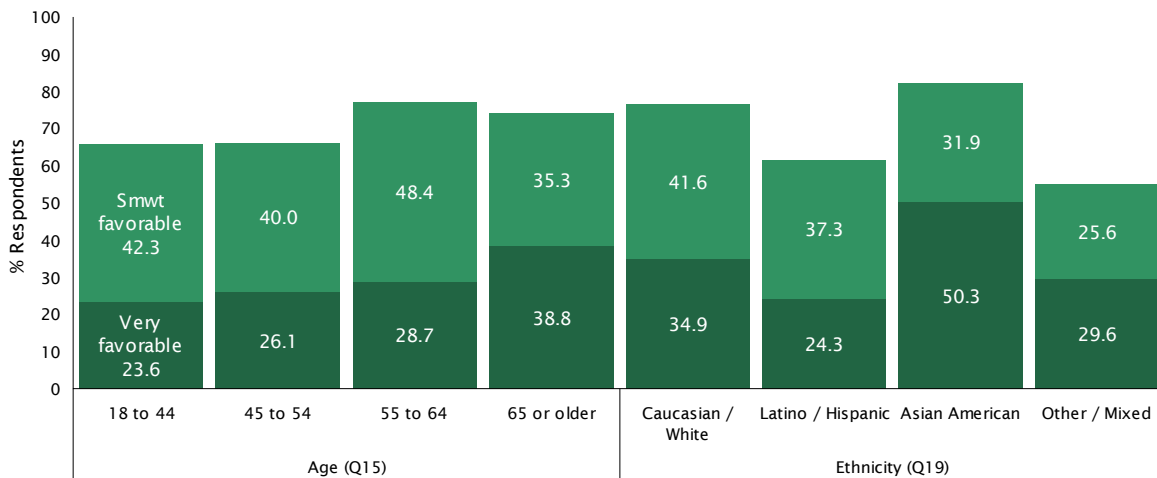


FIGURE 12 OPINION OF SAN JUAN WATER DISTRICT BY AGE & ETHNICITY

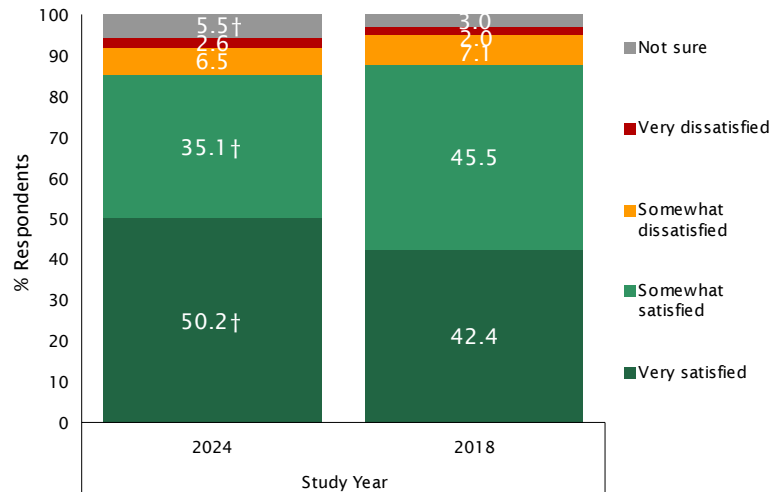


OVERALL SATISFACTION The next question in this series asked respondents to indicate if, overall, they were satisfied or dissatisfied with the job the San Juan Water District is doing to provide water services to their household. Because this question does not reference a specific program, facility, or service and requested that the respondent consider the District’s performance in general, the findings of this question may be regarded as an *overall performance rating* for San Juan Water District.

As shown in Figure 13 on the next page, 85% of customers indicated they were either very (50%) or somewhat (35%) satisfied with San Juan Water District’s efforts to provide water services. Approximately 9% were very or somewhat dissatisfied, and 6% were unsure or unwilling to share their opinion. Compared with the findings of the 2018 study, there was a statistically significant increase in the percentage *very* satisfied and unsure, and a drop in the percentage who were somewhat satisfied.

Question 4 Generally speaking, are you satisfied or dissatisfied with the overall services provided by the San Juan Water District?

FIGURE 13 OVERALL SATISFACTION BY STUDY YEAR



† Statistically significant change (p < 0.05) between the 2018 and 2024 studies.

Although satisfaction with the services provided by San Juan Water District was widespread, it was notably higher among those who primarily drink unfiltered tap water at home, residents of Folsom, those living in households earning at least \$60,000 annually, and Caucasians. Interestingly, satisfaction did not bear a consistent relationship to the amount of customers’ bi-monthly water bills—meaning that those with comparatively high bills were just as satisfied with the District’s performance as those with lower bills.

FIGURE 14 OVERALL SATISFACTION BY PRIMARY TYPE OF DRINKING WATER, CITY OF RESIDENCE & GENDER

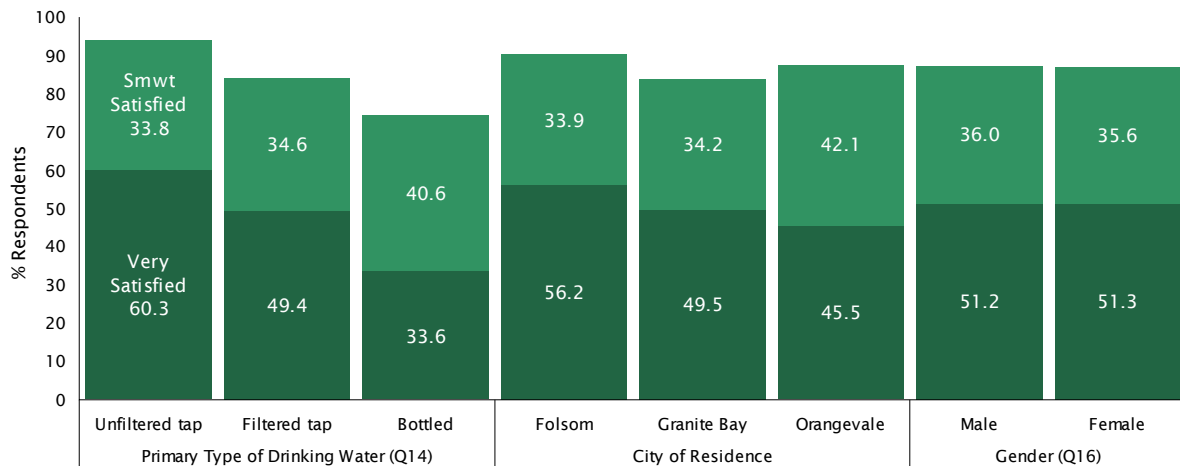


FIGURE 15 OVERALL SATISFACTION BY HSLD INCOME & AVERAGE BILL AMOUNT

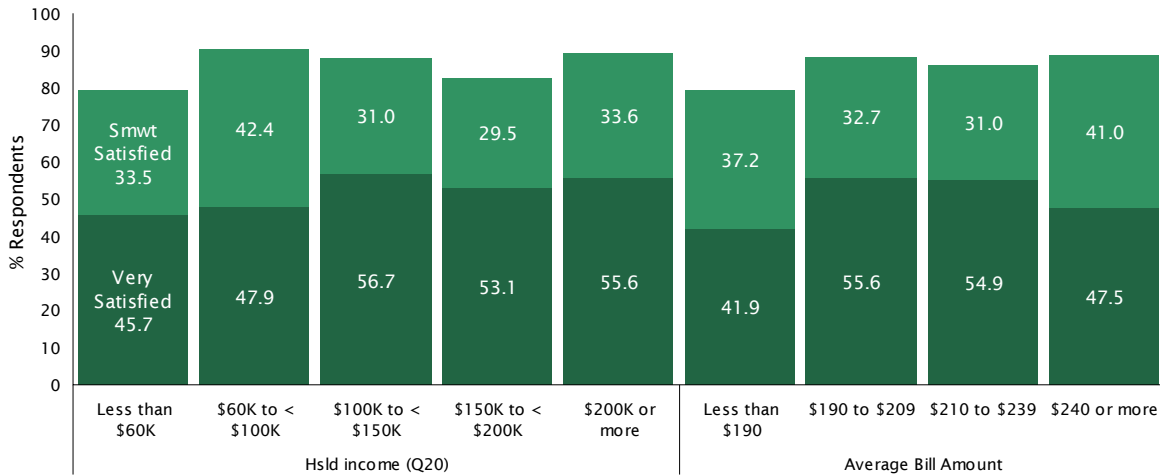
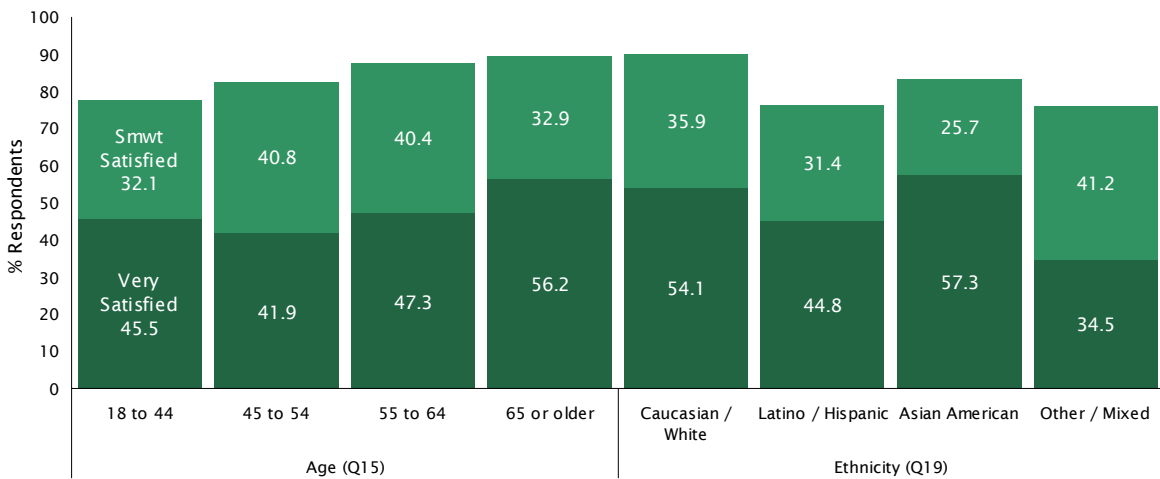


FIGURE 16 OVERALL SATISFACTION BY AGE & ETHNICITY

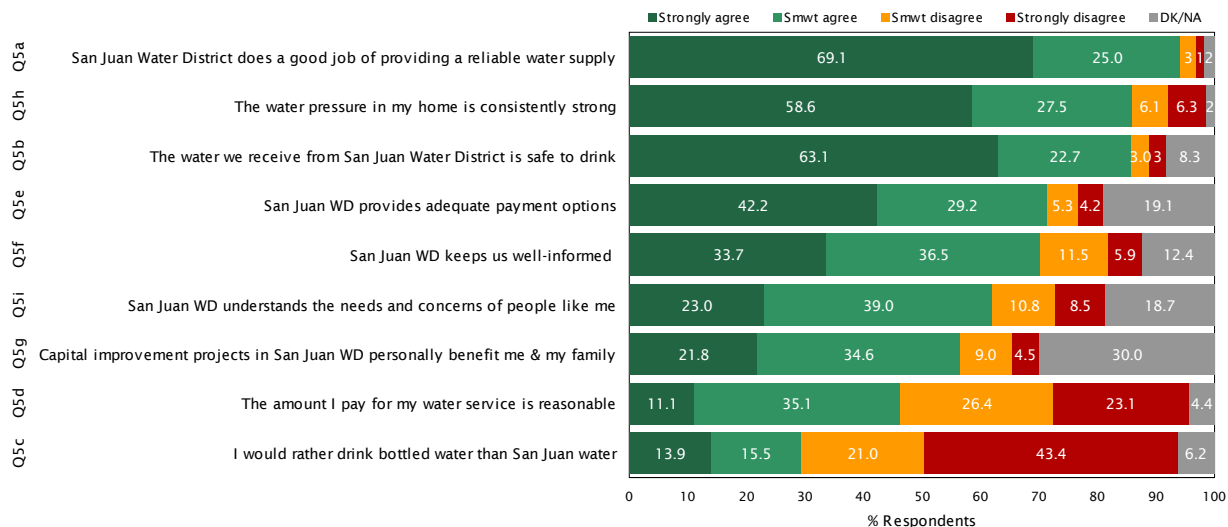


PERFORMANCE STATEMENTS Having measured respondents’ overall satisfaction with San Juan Water District’s performance in providing services, the survey next sought to profile their opinions of the District’s performance in more specific areas including water reliability, payment options, and cost. The structure of Question 5 was straightforward: for each of the statements shown in truncated form on the left of Figure 17 on the next page, respondents were simply asked the extent to which they agreed or disagreed with each statement about San Juan Water District. The statements are sorted from high to low in the figure based on the percentage of respondents who agreed (strongly or somewhat) with the statement.

Among the statements tested, respondents expressed the highest levels of agreement with: *San Juan Water District does a good job of providing a reliable water supply* (94% strongly or somewhat agree), *The water pressure in my home is consistently strong* (86%), and *The water we receive from San Juan Water District is safe to drink* (86%). More than two-thirds of respondents also agreed that *San Juan Water District provides adequate payment options* (71%) and *San Juan Water District keeps us well-informed about capital improvement projects, including improvements to the water treatment plant, pipelines and other portions of the water system, and how these improvements benefit customers* (70%).

Question 5 Next, I am going to read you a series of statements people may make about the San Juan Water District. For each one, please tell me if you agree or disagree with the statement.

FIGURE 17 AGREEMENT WITH STATEMENTS



A majority of customers also agreed that *San Juan Water District understands the needs and concerns of people like me* (62%) and *Capital improvement projects in San Juan Water District personally benefit me and my family* (56%). When compared to the other statements tested, far fewer respondents agreed that *The amount I pay for my water service is reasonable* (46%) or that *they would rather drink bottled water than San Juan water* (29%).

When compared to the 2018 survey results (see Table 1), there was a statistically significant increase in the percentage of respondent who indicated they would rather drink bottled water (+6%) and significant declines in the percentage who felt the water they receive from San Juan Water District is safe to drink (-4%) and the amount they pay for water service is reasonable (-6%).

TABLE 1 AGREEMENT WITH STATEMENTS BY STUDY YEAR

	Study Year		Change in Strongly + Smwt Agree 2018 to 2024
	2024	2018	
I would rather drink bottled water than San Juan water	29	23	+6.4†
Capital improvement projects in San Juan Water District personally benefit me & my family	56	56	+0.4
San Juan Water District does a good job of providing a reliable water supply	94	94	+0.1
The water pressure in my home is consistently strong	86	88	-2.0
San Juan Water District provides adequate payment options	71	75	-3.5
The water we receive from San Juan Water District is safe to drink	86	90	-4.2†
San Juan Water District keeps us well-informed	70	75	-4.8
The amount I pay for my water service is reasonable	46	52	-5.8†
San Juan Water District understands the needs and concerns of people like me	62	N/A	N/A

† Statistically significant change (p < 0.05) between the 2018 and 2024 studies.

For the interested reader, tables 2-5 show how the percentage who strongly agreed with each statement varied across key respondent subgroups. To ease comparisons, the three statements with the highest percentage agreeing with the statement are highlighted in green for each subgroup.

TABLE 2 AGREEMENT WITH STATEMENTS BY OVERALL SATISFACTION, PRIMARY TYPE OF DRINKING WATER & GENDER (SHOWING % STRONGLY AGREE)

	Overall Satisfaction (Q4)		Primary Type of Drinking Water (Q14)			Gender (Q16)	
	Satisfied	Dissatisfied	Unfiltered tap	Filtered tap	Bottled	Male	Female
San Juan Water District does a good job of providing a reliable water supply	75.1	31.5	78.6	69.7	47.8	73.3	67.6
The water we receive from San Juan Water District is safe to drink	69.0	33.5	87.3	57.5	35.8	72.5	55.6
The water pressure in my home is consistently strong	64.1	20.9	65.7	58.9	43.4	61.9	57.1
San Juan WD provides adequate payment options	47.0	14.6	42.7	43.6	37.1	41.6	44.5
San Juan WD keeps us well-informed	38.4	2.0	42.8	33.7	15.2	35.4	33.9
San Juan WD understands the needs and concerns of people like me	26.3	0.0	31.6	20.1	18.6	23.3	24.2
Capital improvement projects in San Juan WD personally benefit me & my family	25.0	5.9	25.9	21.5	15.2	24.6	19.8
I would rather drink bottled water than San Juan water	11.2	35.2	0.6	11.9	53.8	11.9	14.8
The amount I pay for my water service is reasonable	13.0	0.0	12.4	10.5	11.1	10.9	12.0

TABLE 3 AGREEMENT WITH STATEMENTS BY ETHNICITY & CITY OF RESIDENCE (SHOWING % STRONGLY AGREE)

	Ethnicity (Q19)				City of Residence		
	Caucasian / White	Latino/ Hispanic	Asian American	Other / Mixed	Folsom	Granite Bay	Orangevale
San Juan Water District does a good job of providing a reliable water supply	71.7	57.9	64.3	75.5	73.8	67.8	68.4
The water we receive from San Juan Water District is safe to drink	65.7	60.2	46.3	72.2	68.8	62.8	57.0
The water pressure in my home is consistently strong	60.6	55.5	50.1	62.2	63.1	58.8	50.6
San Juan WD provides adequate payment options	46.4	37.1	38.9	33.7	43.5	40.0	51.8
San Juan WD keeps us well-informed	36.1	29.0	28.8	37.7	29.1	35.1	33.6
San Juan WD understands the needs and concerns of people like me	25.8	13.6	18.0	33.5	23.6	21.9	27.6
Capital improvement projects in San Juan WD personally benefit me & my family	23.9	21.7	21.4	17.1	16.1	22.6	27.5
I would rather drink bottled water than San Juan water	12.6	18.3	17.6	13.7	9.0	13.2	21.7
The amount I pay for my water service is reasonable	11.5	13.2	3.4	17.1	15.4	10.1	10.4

TABLE 4 AGREEMENT WITH STATEMENTS BY HSLD INCOME (SHOWING % STRONGLY AGREE)

	HslD income (Q20)				
	Less than \$60K	\$60K to < \$100K	\$100K to < \$150K	\$150K to < \$200K	\$200K or more
San Juan Water District does a good job of providing a reliable water supply	65.9	70.8	79.3	73.2	70.3
The water we receive from San Juan Water District is safe to drink	63.8	62.7	65.1	66.0	66.5
The water pressure in my home is consistently strong	54.9	56.8	60.2	61.2	61.9
San Juan WD provides adequate payment options	35.2	39.0	56.3	43.5	49.8
San Juan WD keeps us well-informed	32.0	41.4	31.0	39.0	34.8
San Juan WD understands the needs and concerns of people like me	23.1	23.4	17.3	28.7	26.4
Capital improvement projects in San Juan WD personally benefit me & my family	16.1	21.0	19.1	30.1	24.8
I would rather drink bottled water than San Juan water	22.5	14.6	9.0	17.4	8.3
The amount I pay for my water service is reasonable	11.8	4.8	13.9	7.7	15.7

TABLE 5 AGREEMENT WITH STATEMENTS BY AGE & AVERAGE BILL AMOUNT (SHOWING % STRONGLY AGREE)

	Age (Q15)				Average Bill Amount			
	18 to 44	45 to 54	55 to 64	65 or older	Less than \$190	\$190 to \$209	\$210 to \$239	\$240 or more
San Juan Water District does a good job of providing a reliable water supply	68.4	64.2	71.0	70.9	61.2	77.8	74.3	60.7
The water we receive from San Juan Water District is safe to drink	55.5	45.1	64.5	70.6	55.8	64.7	64.6	67.2
The water pressure in my home is consistently strong	55.4	68.2	58.6	58.8	51.2	64.7	58.4	57.4
San Juan WD provides adequate payment options	52.8	28.8	43.3	43.9	38.8	40.5	49.6	40.2
San Juan WD keeps us well-informed	26.3	17.2	34.4	40.7	27.9	40.5	35.4	27.9
San Juan WD understands the needs and concerns of people like me	26.6	8.8	19.0	29.7	17.8	22.2	27.4	23.8
Capital improvement projects in San Juan WD personally benefit me & my family	22.0	12.4	19.6	27.0	19.4	26.1	23.9	18.0
I would rather drink bottled water than San Juan water	21.1	16.9	14.0	10.0	17.1	14.4	15.0	9.8
The amount I pay for my water service is reasonable	15.6	5.2	7.8	13.1	8.5	10.5	13.3	12.3

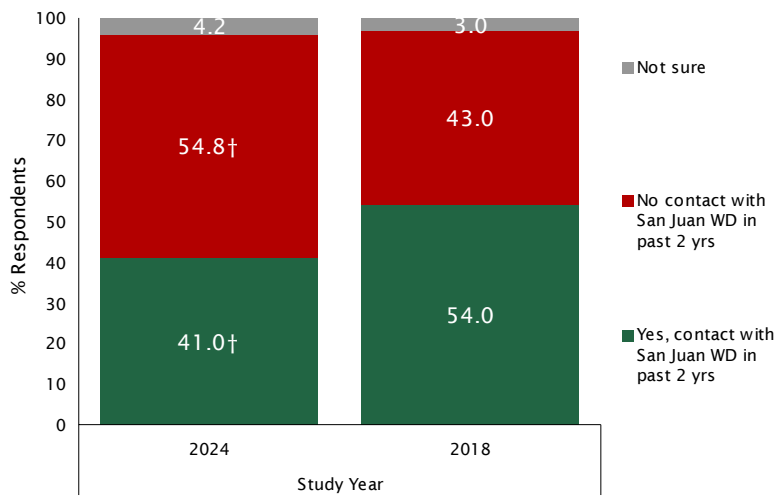
CUSTOMER SERVICE

The next section of the survey included questions to gauge whether residential customers had contacted San Juan Water District in the two years prior to the survey, as well as their satisfaction with the customer service they received during these interactions.

DISTRICT CONTACT Respondents were asked if they had contact with San Juan Water District for customer service during the two years preceding the interview. Figure 18 shows that approximately four-in-ten respondents (41%) had personally interacted with the District during this period, which is significantly lower than the 54% recorded in the 2018 survey. Figures 19-21 show how rates of contact with the District varied across customer subgroups in 2024.

Question 6 *Over the past two years, have you had contact with San Juan Water District customer service?*

FIGURE 18 CONTACT SAN JUAN WATER DISTRICT CUSTOMER SERVICE IN PAST 2 YEARS BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2018 and 2024 studies.

FIGURE 19 CONTACT SAN JUAN WATER DISTRICT CUSTOMER SERVICE IN PAST 2 YEARS BY OVERALL SATISFACTION, PRIMARY TYPE OF DRINKING WATER & CITY OF RESIDENCE

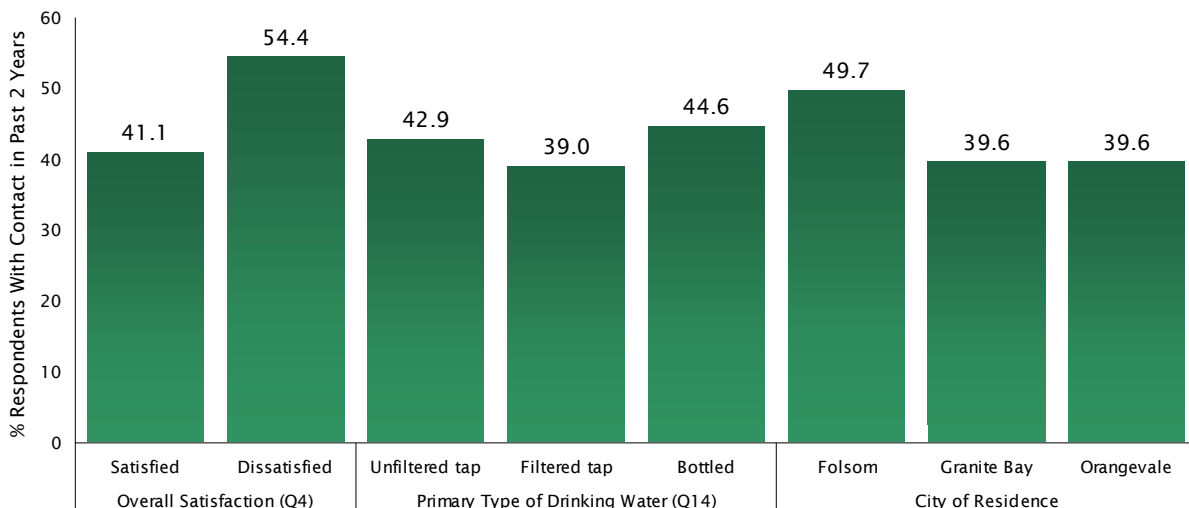


FIGURE 20 CONTACT SAN JUAN WATER DISTRICT CUSTOMER SERVICE IN PAST 2 YEARS BY HSLD INCOME & AVERAGE BILL AMOUNT

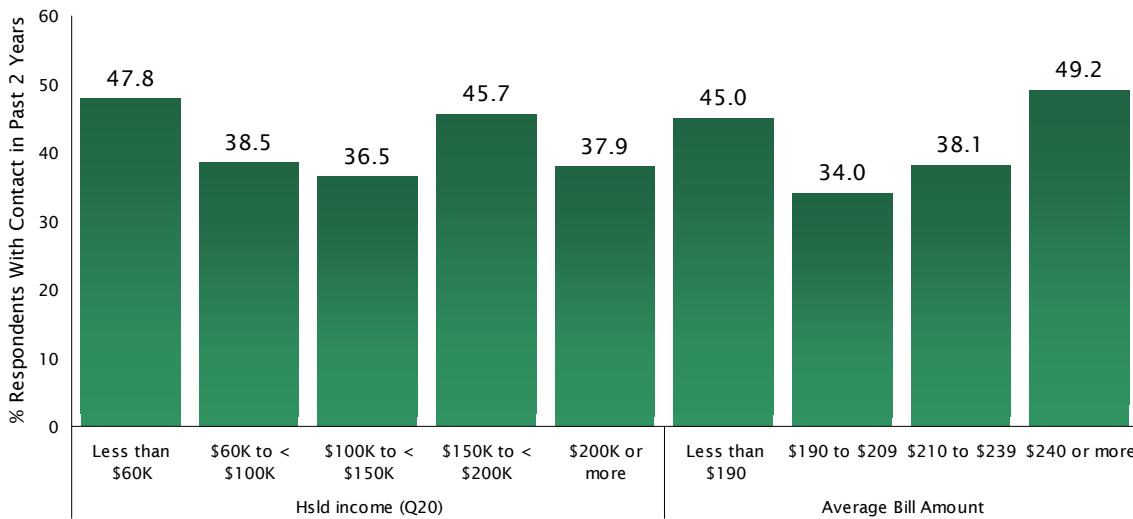
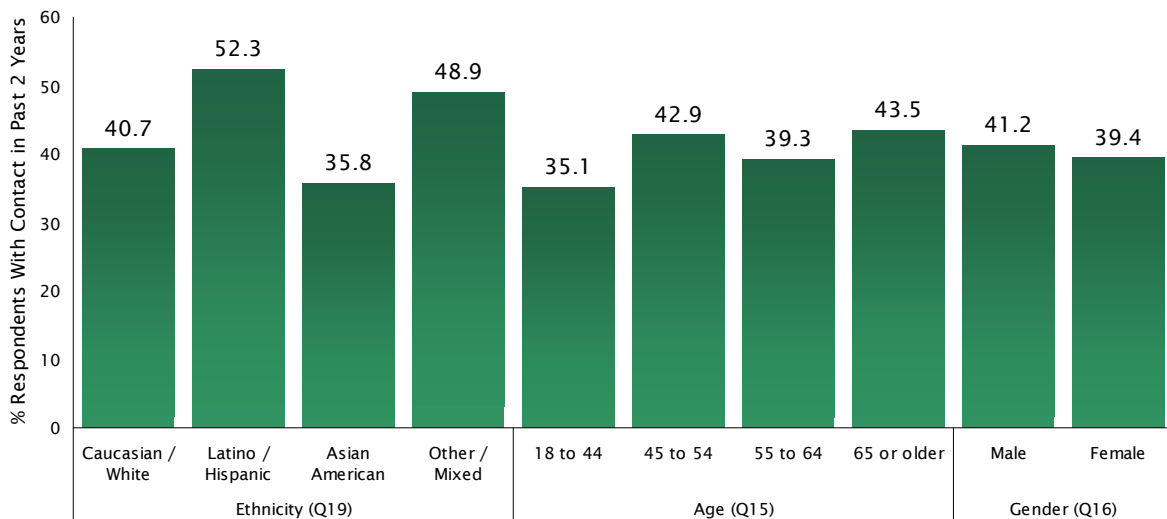


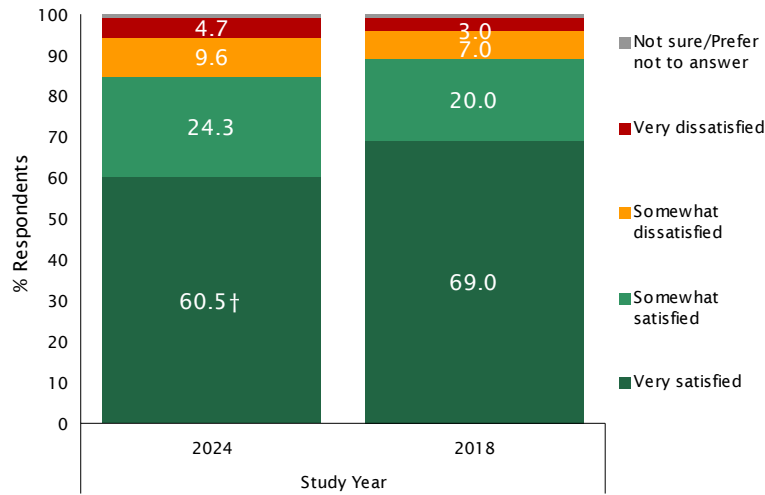
FIGURE 21 CONTACT SAN JUAN WATER DISTRICT CUSTOMER SERVICE IN PAST 2 YEARS BY ETHNICITY, AGE & GENDER



SATISFACTION WITH CUSTOMER SERVICE Respondents who indicated they had contacted San Juan Water District customer service during the two years prior to taking the survey were subsequently asked to describe their level of satisfaction with the service they received during these interactions. As shown in Figure 22 on the next page, 85% of customers who contacted San Juan Water District customer service indicated they were satisfied with the service they received, with 61% indicating they were very satisfied. Approximately 14% were dissatisfied with the service they received, whereas 1% were unsure or preferred to not answer the question. When compared to the 2018 survey, the percentage reporting that they were *very* satisfied in 2024 declined significantly (from 69% to 61%).

Question 7 Overall, were you satisfied or dissatisfied with the service you received from San Juan Water District customer service?

FIGURE 22 SATISFACTION WITH SAN JUAN WATER DISTRICT CUSTOMER SERVICE BY STUDY YEAR

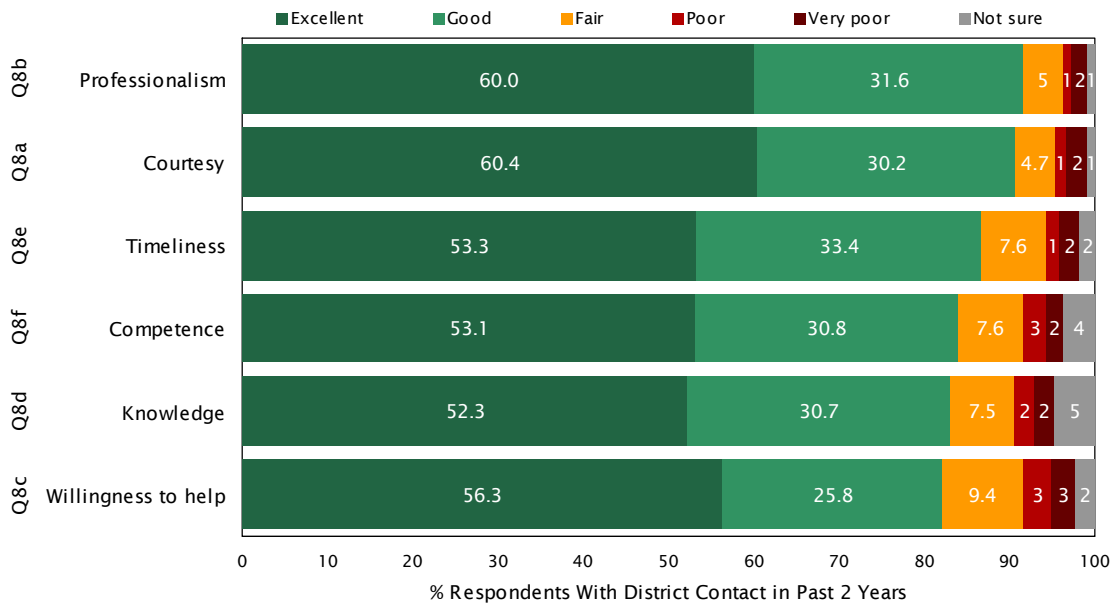


† Statistically significant change (p < 0.05) between the 2018 and 2024 studies.

SATISFACTION WITH SERVICE REPRESENTATIVES The final question in this series asked customers who had been in contact with the District to rate the customer service representatives they dealt with at San Juan Water District on each of the dimensions shown in Figure 23.

Question 8 Thinking of the customer service representatives you dealt with, would you rate their _____ as excellent, good, fair, poor, or very poor?

FIGURE 23 RATING CUSTOMER SERVICE REPRESENTATIVES



San Juan Water District’s customer service representatives were given high marks across the board, with more than eight-in-ten respondents rating their performance as excellent or good on every performance dimension tested including professionalism (92% excellent or good), courtesy (91%), timeliness (87%), competence (84%), knowledge (83%), and willingness to help (82%). Table 6 shows that although there was slight downward movement in the ratings between 2018 and 2024 for most dimensions, none of the changes achieved statistical significance.

TABLE 6 RATING CUSTOMER SERVICE REPRESENTATIVES BY STUDY YEAR

	Study Year		Change in Excellent + Good 2018 to 2024
	2024	2018	
Professionalism	92	91	+0.6
Courtesy	91	92	-1.4
Competence	84	86	-2.1
Timeliness	87	89	-2.4
Knowledge	83	87	-3.9
Willingness to help	82	89	-6.9

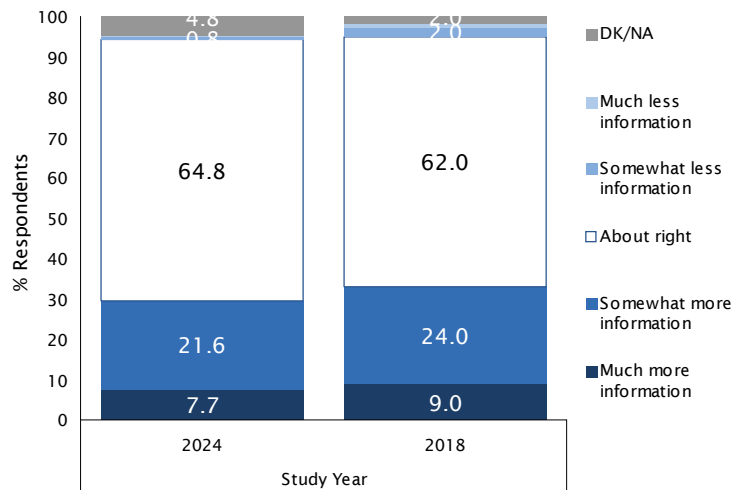
COMMUNICATION

The next section of the survey was designed to measure respondents’ interest in receiving information from San Juan Water District, identify the specific topics of interest, as well as profile the most effective ways for the District to communicate with residential customers.

AMOUNT OF INFORMATION FROM SAN JUAN WATER DISTRICT When asked if they would prefer to have more information about San Juan Water District, less information, or if the amount they currently receive is about right, nearly two-thirds (65%) indicated that the current amount of information is about right. Approximately one-in-three respondents indicated they’d like somewhat more (22%) or much more (8%) information about San Juan Water District, whereas 1% preferred less information and 5% were unsure or preferred to not answer the question. The results in 2024 for this question are similar to those of the 2018 survey—there were no significant changes.

Question 9 Overall, would you prefer to have more information about your water district, less information, or is the amount you receive about right?

FIGURE 24 DESIRE MORE INFORMATION ABOUT WATER DISTRICT BY STUDY YEAR



For the interested reader, figures 25-27 on the next page show how desire for more information about San Juan Water District varied across customer subgroups. When compared to their respective counterparts, customers who were dissatisfied with the water services their household receives, those who primarily drink bottled water when home, individuals who identify as Latino or ‘other/mixed’ ethnicities, customers from households earning less than \$60,000 annually, customers whose average water bill is less than \$190, and individuals who were dissatisfied with San Juan Water District’s customer service were the most likely to desire more information about the District.

FIGURE 25 DESIRE MORE INFORMATION ABOUT WATER DISTRICT BY OVERALL SATISFACTION, PRIMARY TYPE OF DRINKING WATER & CITY OF RESIDENCE

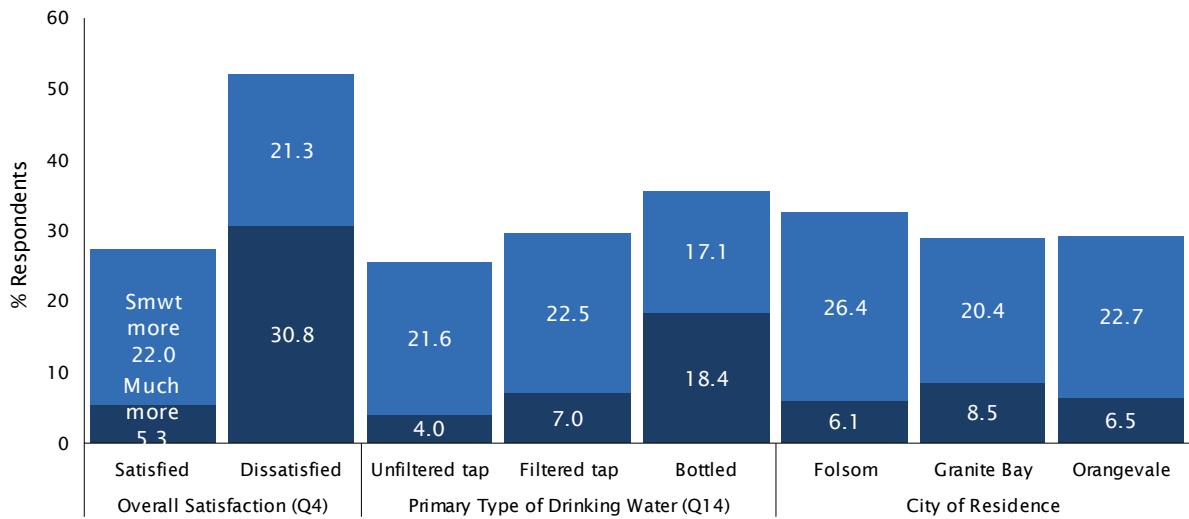


FIGURE 26 DESIRE MORE INFORMATION ABOUT WATER DISTRICT BY ETHNICITY & HSLD INCOME

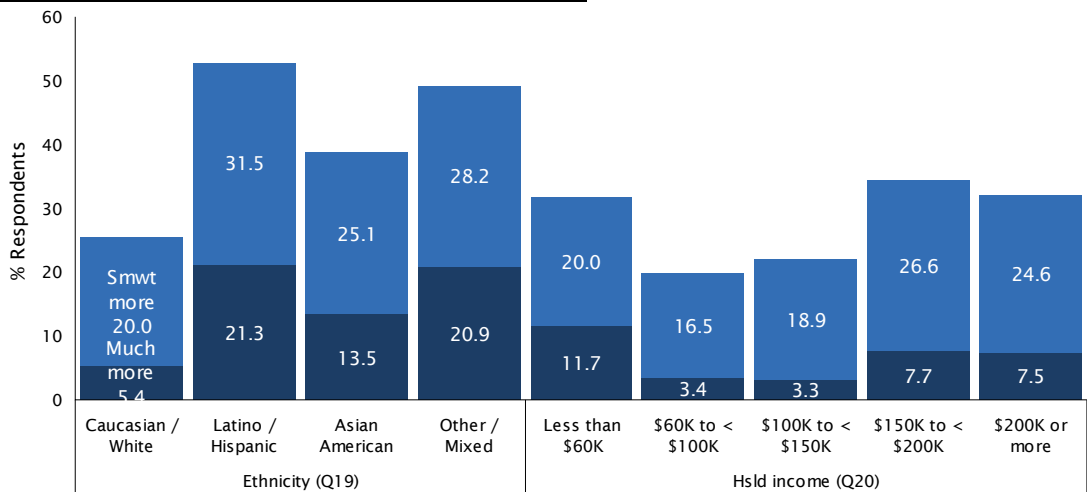
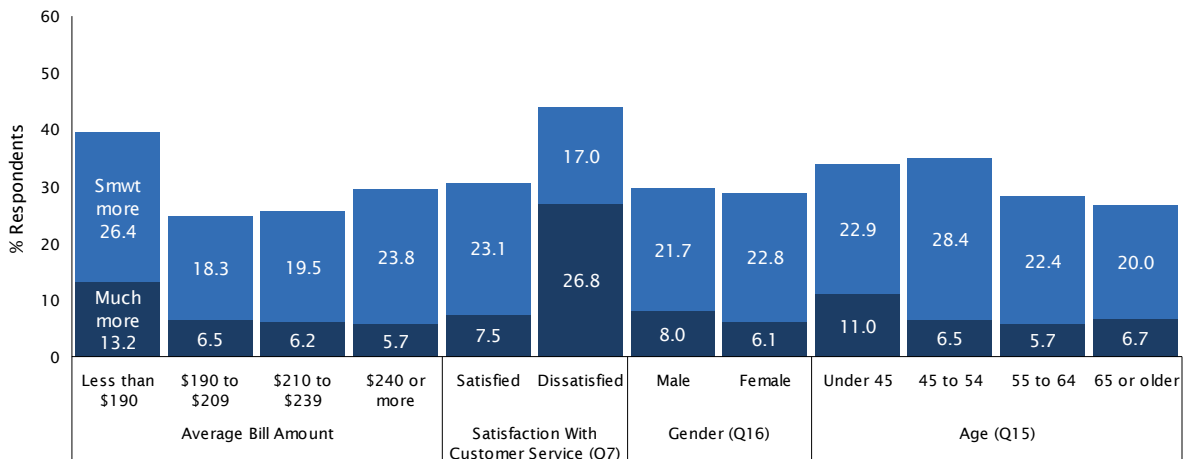


FIGURE 27 DESIRE MORE INFORMATION ABOUT WATER DISTRICT BY AVERAGE BILL AMOUNT, SATISFACTION WITH CUSTOMER SERVICE, GENDER & AGE

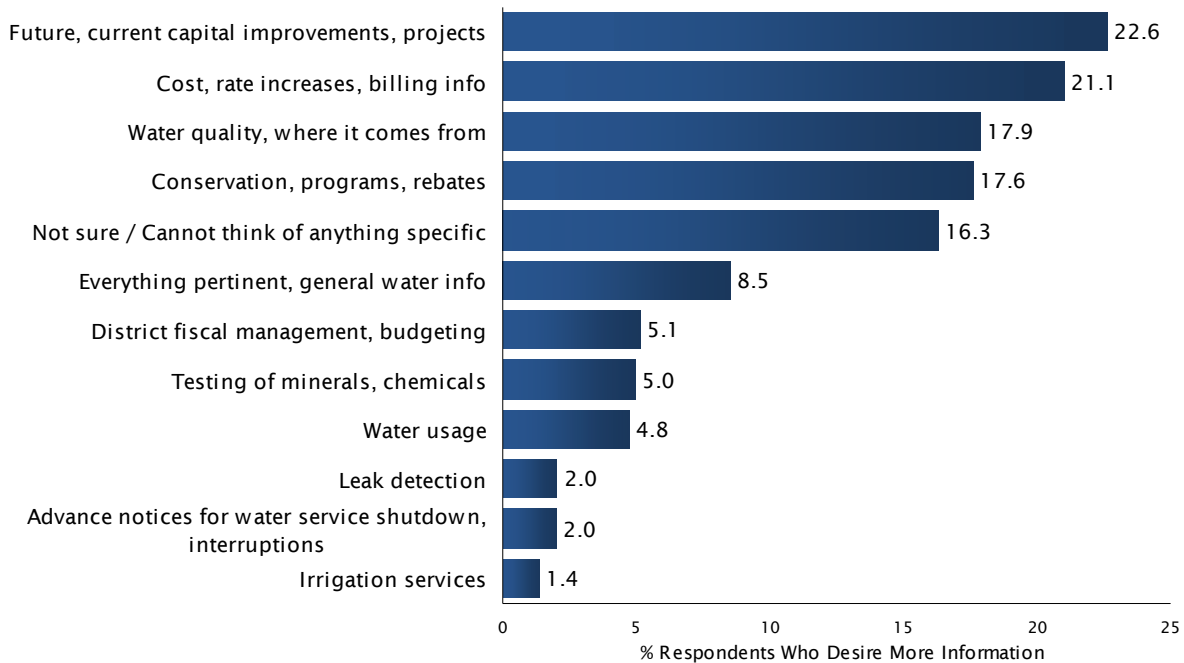


TYPES OF INFORMATION DESIRED Customers who indicated that they desired more information about San Juan Water District in Question 9 were subsequently asked to describe the *types* of information they would like to receive. Question 10 was presented in an open-ended manner, thereby allowing respondents to mention any type of information that came to mind without being prompted by or restricted to a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 28.

Among the specific topics requested, the most common were information about future/current capital improvement projects (23%), costs/rate/billing (21%), water quality/water sources (18%), and conservation programs/rebates (18%).

Question 10 *What types of information would you like to receive more of from your water district?*

FIGURE 28 TYPE OF INFORMATION DESIRE FROM WATER DISTRICT



Having provided respondents with an open-ended opportunity to suggest specific topics they would like to receive more information about from the District in Question 10, the survey next presented all respondents with the items shown on the left of Figure 29 and asked the degree to which they would be interested in receiving information on this type of service from the District. The vast majority of respondents indicated they would be very or somewhat interested in receiving notification when there are spikes in their household’s water usage (87%) and information about water efficiency resources such as workshops, kits, rebates, and free irrigation audits (74%). Most respondents also expressed interest in community education events such as tours or open houses at water district facilities (55%). Approximately one-third of respondents (33%) were interested in receiving information about discounts for low-income customers. The level of interest in receiving information on these topics did not change significantly between 2018 and 2024 (Table 7), but did vary across customer subgroups (see tables 8-11).

Question 11 Next, I am going to mention different types of information on services your water district may provide you. For each, please tell me if you are very interested, somewhat interested, or not interested in receiving information on this service.

FIGURE 29 INTEREST IN TYPES OF INFORMATION ON SERVICES OF WATER DISTRICT

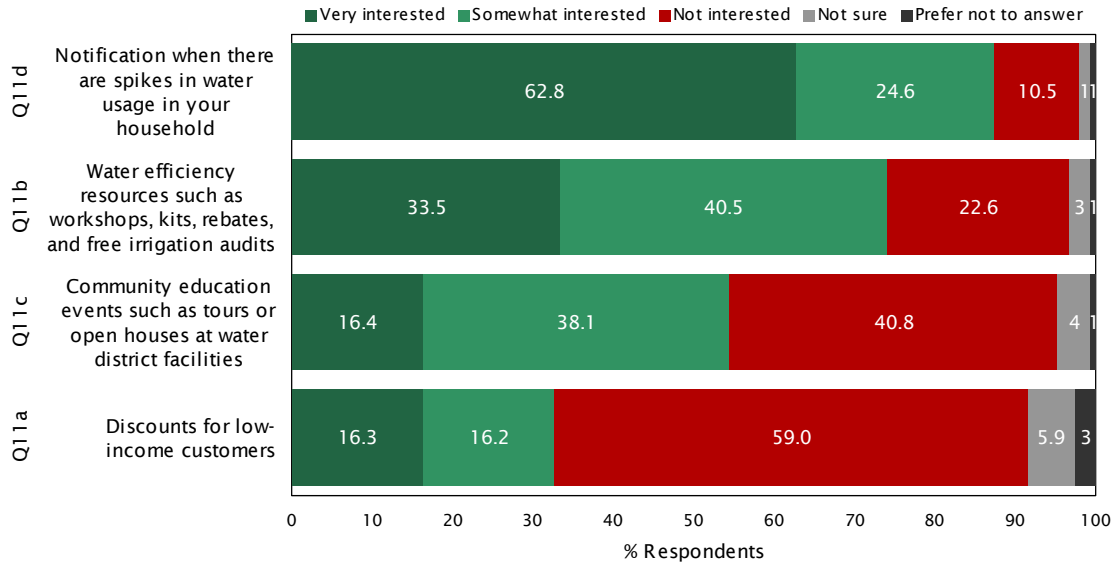


TABLE 7 INTEREST IN TYPES OF INFORMATION ON SERVICES OF WATER DISTRICT BY STUDY YEAR

	Study Year		Change in Very + Smwt Interested 2018 to 2024
	2024	2018	
Community education events such as tours or open houses at water district facilities	54	55	-0.5
Notification when there are spikes in water usage in your household	87	89	-1.6
Discounts for low-income customers	33	36	-3.4
Water efficiency resources such as workshops, kits, rebates, and free irrigation audits	74	78	-4.0

TABLE 8 INTEREST IN TYPES OF INFORMATION ON SERVICES OF WATER DISTRICT BY OVERALL SATISFACTION, PRIMARY TYPE OF DRINKING WATER & GENDER (SHOWING % VERY INTERESTED)

	Overall Satisfaction (Q4)		Primary Type of Drinking Water (Q14)			Gender (Q16)	
	Satisfied	Dissatisfied	Unfiltered tap	Filtered tap	Bottled	Male	Female
Notification when there are spikes in water usage in your household	64.5	51.6	57.1	66.8	57.2	60.5	65.4
Water efficiency resources such as workshops, kits, rebates, and free irrigation audits	35.2	23.1	33.5	36.2	22.8	29.8	38.9
Community education events such as tours or open houses at water district facilities	17.6	10.1	14.8	17.2	16.7	13.1	20.7
Discounts for low-income customers	14.7	27.0	11.3	15.6	30.5	12.5	20.1

TABLE 9 INTEREST IN TYPES OF INFORMATION ON SERVICES OF WATER DISTRICT BY ETHNICITY & CITY OF RESIDENCE (SHOWING % VERY INTERESTED)

	Ethnicity (Q19)				City of Residence		
	Caucasian / White	Latino/ Hispanic	Asian American	Other / Mixed	Folsom	Granite Bay	Orangevale
Notification when there are spikes in water usage in your household	63.4	64.7	70.8	55.9	64.6	62.8	63.2
Water efficiency resources such as workshops, kits, rebates, and free irrigation audits	32.9	36.7	35.0	30.9	44.5	32.4	26.9
Community education events such as tours or open houses at water district facilities	16.8	18.4	20.9	10.3	23.2	14.1	19.6
Discounts for low-income customers	15.8	13.2	10.6	27.4	12.1	16.8	19.0

TABLE 10 INTEREST IN TYPES OF INFORMATION ON SERVICES OF WATER DISTRICT BY HSLD INCOME (SHOWING % VERY INTERESTED)

	HslD income (Q20)				
	Less than \$60K	\$60K to < \$100K	\$100K to < \$150K	\$150K to < \$200K	\$200K or more
Notification when there are spikes in water usage in your household	59.6	62.5	58.9	62.4	66.4
Water efficiency resources such as workshops, kits, rebates, and free irrigation audits	29.6	36.0	22.4	36.0	40.0
Community education events such as tours or open houses at water district facilities	17.8	16.8	15.0	15.4	17.2
Discounts for low-income customers	55.7	17.9	17.7	12.4	7.9

TABLE 11 INTEREST IN TYPES OF INFORMATION ON SERVICES OF WATER DISTRICT BY AGE & AVERAGE BILL AMOUNT (SHOWING % VERY INTERESTED)

	Age (Q15)				Average Bill Amount			
	18 to 44	45 to 54	55 to 64	65 or older	Less than \$190	\$190 to \$209	\$210 to \$239	\$240 or more
Notification when there are spikes in water usage in your household	63.4	77.9	59.6	61.6	65.9	58.2	62.8	63.9
Water efficiency resources such as workshops, kits, rebates, and free irrigation audits	32.8	35.0	38.1	31.0	35.7	32.7	29.2	34.4
Community education events such as tours or open houses at water district facilities	15.4	8.8	14.8	19.0	19.4	17.0	12.4	17.2
Discounts for low-income customers	14.1	8.4	20.2	16.6	25.6	13.1	15.9	12.3

COMMUNICATION METHODS The next question in this series presented respondents with each of the methods shown to the left of Figure 30 and simply asked, for each, whether it would be an effective way for San Juan Water District to communicate with them. Overall, respondents indicated that email was the most effective method (83% very or somewhat effective), followed by water bill inserts (76%), electronic newsletters (71%), direct mailings separate from their water bill (69%), and the District’s website (66%). In comparison, less than half of respondents characterized virtual town halls (47%), Nextdoor (38%), social media (32%), and newspapers (25%) as very or somewhat effective methods for the District to communicate with them. Tables 12-15 show how the perceived effectiveness of each communication method varied across customer subgroups, with the top three rated methods highlighted in green for each subgroup.

Question 12 *As I read the following ways that the water district can communicate with customers, I'd like to know if you think they would be a very effective, somewhat effective, or not at all effective way for the District to communicate with you.*

FIGURE 30 EFFECTIVENESS OF COMMUNICATION METHODS

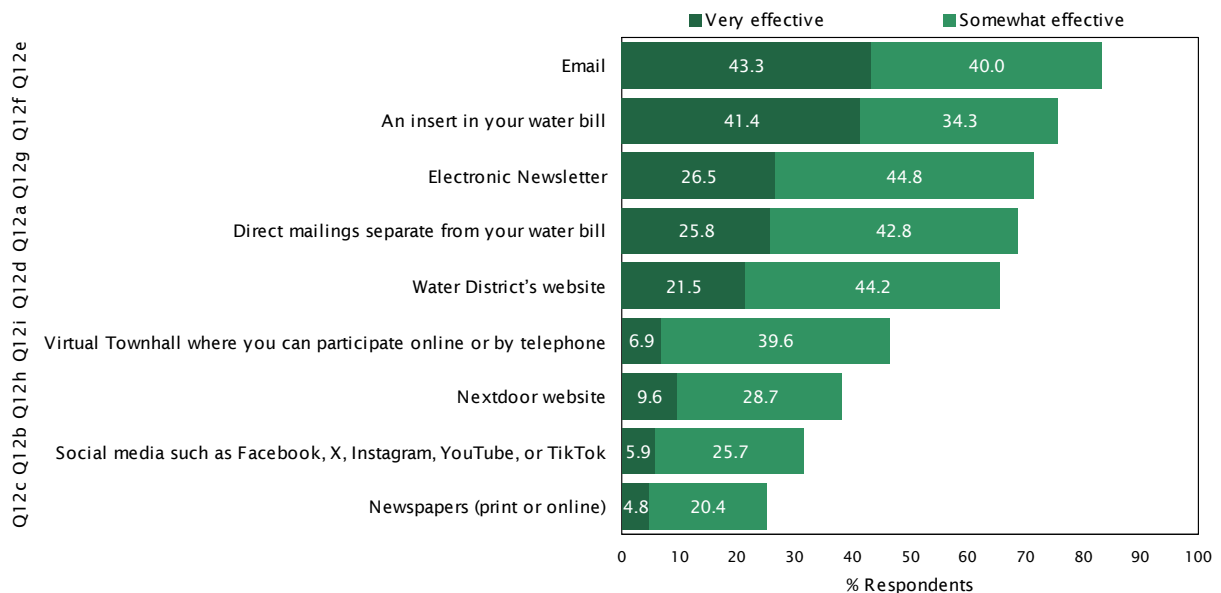


TABLE 12 EFFECTIVENESS OF COMMUNICATION METHODS BY OVERALL SATISFACTION, PRIMARY TYPE OF DRINKING WATER & GENDER (SHOWING % VERY EFFECTIVE)

	Overall Satisfaction (Q4)		Primary Type of Drinking Water (Q14)			Gender (Q16)	
	Satisfied	Dissatisfied	Unfiltered tap	Filtered tap	Bottled	Male	Female
Email	43.0	26.5	52.6	38.0	32.7	40.7	45.0
An insert in your water bill	46.2	22.6	42.8	44.8	39.9	45.9	40.8
Electronic Newsletter	28.6	14.3	28.6	26.7	22.2	27.0	26.4
Direct mailings separate from your water bill	25.9	26.4	30.5	23.0	29.3	25.6	26.4
Water District's website	22.3	14.4	22.9	22.7	13.8	18.8	25.3
Nextdoor website	9.7	10.1	11.0	9.4	7.6	8.6	11.0
Virtual Townhall where you can participate online or by telephone	7.5	2.0	6.7	7.5	5.0	7.5	6.8
Social media such as Facebook, X, Instagram, YouTube, or TikTok	6.2	6.2	3.9	6.8	6.2	4.9	6.9
Newspapers (print or online)	4.9	2.3	6.1	4.2	5.0	2.8	7.3

TABLE 13 EFFECTIVENESS OF COMMUNICATION METHODS BY ETHNICITY & CITY OF RESIDENCE (SHOWING % VERY EFFECTIVE)

	Ethnicity (Q19)				City of Residence		
	Caucasian / White	Latino/ Hispanic	Asian American	Other / Mixed	Folsom	Granite Bay	Orangevale
Email	41.2	47.7	38.9	44.7	39.7	43.8	34.5
An insert in your water bill	44.6	36.7	49.2	37.8	49.7	42.2	37.7
Electronic Newsletter	27.0	24.3	35.6	16.8	31.1	24.2	28.9
Direct mailings separate from your water bill	25.5	34.0	17.0	37.7	26.7	25.1	30.5
Water District's website	22.7	21.3	10.2	13.8	25.8	19.7	22.9
Nextdoor website	8.8	15.8	10.1	3.7	6.0	10.9	8.9
Virtual Townhall where you can participate online or by telephone	6.4	8.1	13.6	10.3	9.2	6.6	6.4
Social media such as Facebook, X, Instagram, YouTube, or TikTok	5.7	10.7	6.8	3.6	6.1	5.3	9.1
Newspapers (print or online)	5.7	8.5	3.4	0.0	5.0	4.5	6.4

TABLE 14 EFFECTIVENESS OF COMMUNICATION METHODS BY HSLD INCOME (SHOWING % VERY EFFECTIVE)

	HslD income (Q20)				
	Less than \$60K	\$60K to < \$100K	< \$100K to < \$150K	< \$150K to < \$200K	\$200K or more
Email	40.6	39.2	45.4	47.2	38.6
An insert in your water bill	27.1	40.7	49.1	42.3	55.0
Electronic Newsletter	22.6	22.1	24.9	31.1	33.3
Direct mailings separate from your water bill	31.3	21.2	25.9	32.1	26.0
Water District's website	27.1	17.7	14.3	31.2	22.7
Nextdoor website	13.9	13.0	10.0	6.4	6.9
Virtual Townhall where you can participate online or by telephone	4.7	9.8	3.2	11.2	6.2
Social media such as Facebook, X, Instagram, YouTube, or TikTok	11.5	6.4	4.9	4.5	7.0
Newspapers (print or online)	7.1	6.2	1.6	9.4	4.8

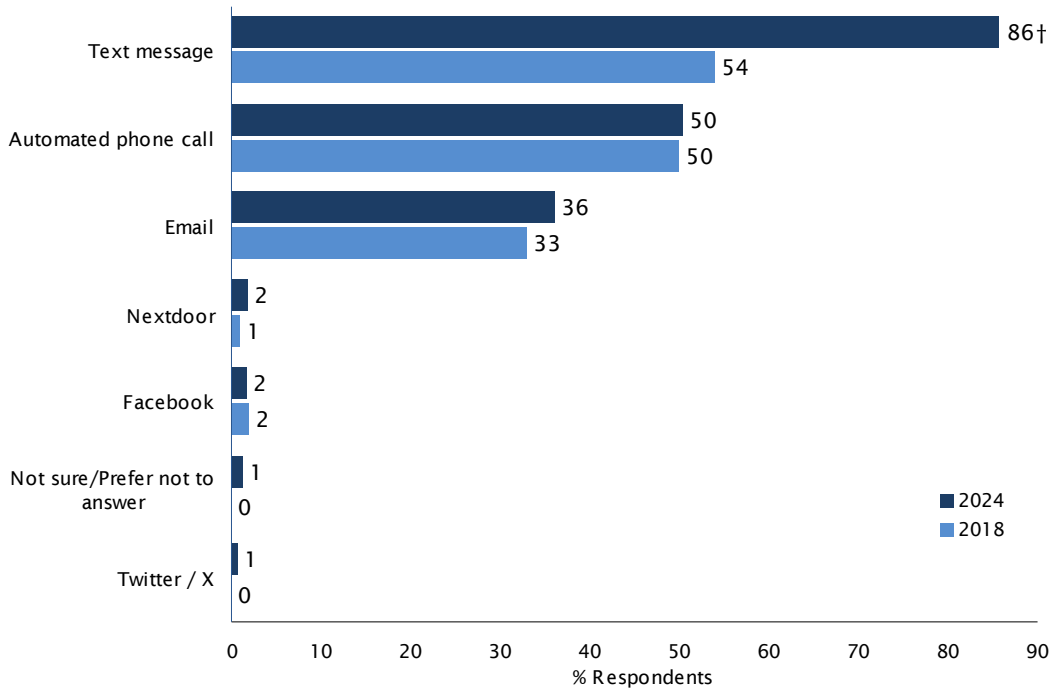
TABLE 15 EFFECTIVENESS OF COMMUNICATION METHODS BY AGE & AVERAGE BILL AMOUNT (SHOWING % VERY EFFECTIVE)

	Age (Q15)				Average Bill Amount			
	18 to 44	45 to 54	55 to 64	65 or older	Less than \$190	\$190 to \$209	\$210 to \$239	\$240 or more
Email	39.4	40.3	44.4	43.8	39.5	45.8	46.0	33.6
An insert in your water bill	42.3	43.9	44.6	46.2	38.8	43.8	47.8	42.6
Electronic Newsletter	16.9	37.1	32.3	24.1	24.0	24.2	33.6	23.8
Direct mailings separate from your water bill	23.4	16.1	35.2	26.1	32.6	28.8	25.7	17.2
Water District's website	25.1	27.3	20.9	20.8	17.1	26.1	26.5	14.8
Nextdoor website	9.1	5.0	10.9	11.1	8.5	11.1	8.0	10.7
Virtual Townhall where you can participate online or by telephone	6.1	3.1	10.2	6.4	6.2	7.8	6.2	7.4
Social media such as Facebook, X, Instagram, YouTube, or TikTok	7.6	6.8	5.7	5.9	7.0	7.8	5.3	3.3
Newspapers (print or online)	3.3	3.4	5.9	5.3	4.7	5.2	4.4	3.3

EMERGENCY CONTACT METHOD When asked how they would prefer to be contacted by San Juan Water District in the case of an emergency that requires immediate action, the most commonly selected options in 2024 were text messages (86%), automated phone calls (50%), and email (36%). When compared to 2018, the percentage who cited text messages as a preferred emergency contact method increased significantly (see Figure 31 on the next page).

Question 13 How would you prefer the Water District contact you in the case of an emergency that requires you to take immediate action?

FIGURE 31 PREFER METHOD OF CONTACT FOR AN EMERGENCY BY STUDY YEAR



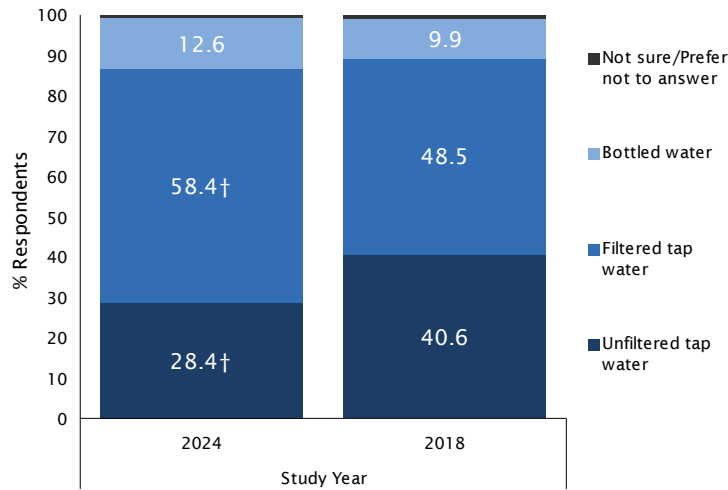
† Statistically significant change (p < 0.05) between the 2018 and 2024 studies.

STRAIGHT, FILTERED, OR BOTTLED?

The final substantive question of the survey asked customers to indicate whether they primarily drink water straight from the faucet, filtered water from the faucet, or bottled water when they are at home. More than half (58%) of respondents indicated they primarily drink filtered tap water when home, and an additional 28% stated they drink water straight from the tap. Approximately 13% of respondents offered that they primarily drink bottled water when home, whereas 1% were unsure or unwilling to share their opinion. When compared to the 2018 survey findings, the percentage who indicated they drink unfiltered tap water declined significantly, with a corresponding increase in the percentage who reported drinking filtered tap water. Figures 33-35 show how the responses to Question 14 varied by customer characteristics.

Question 14 *What kind of water do you primarily drink at home? Unfiltered tap water, filtered tap water, or bottled water?*

FIGURE 32 PRIMARY TYPE OF DRINKING WATER BY STUDY YEAR



† Statistically significant change (p < 0.05) between the 2018 and 2024 studies.

FIGURE 33 PRIMARY TYPE OF DRINKING WATER BY OVERALL SATISFACTION, CITY OF RESIDENCE & ETHNICITY

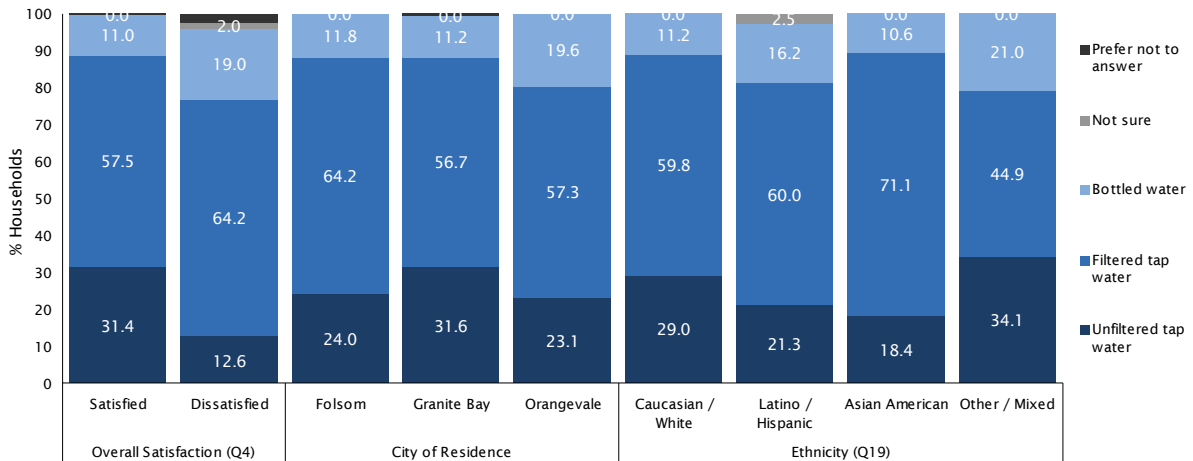


FIGURE 34 PRIMARY TYPE OF DRINKING WATER BY HSLD INCOME & AVERAGE BILL AMOUNT

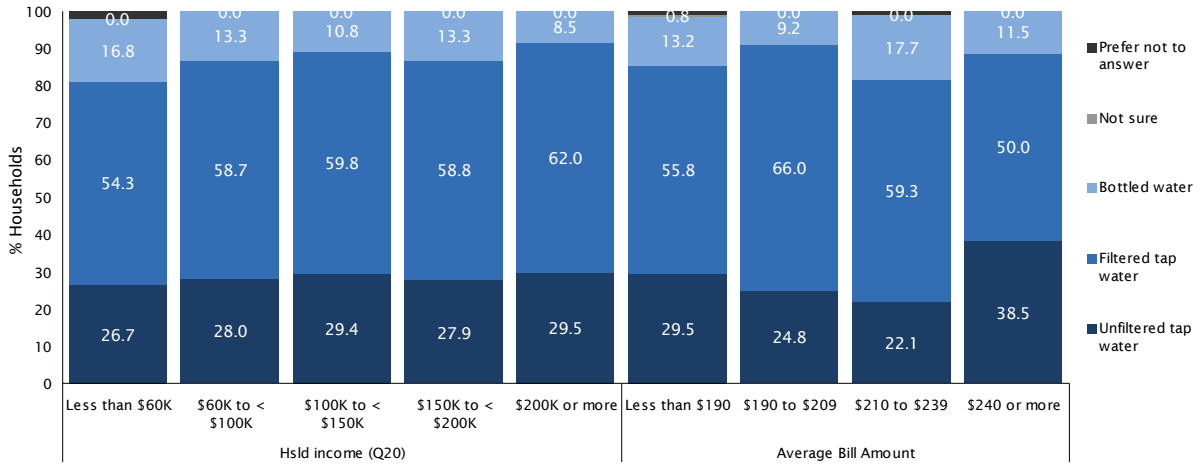
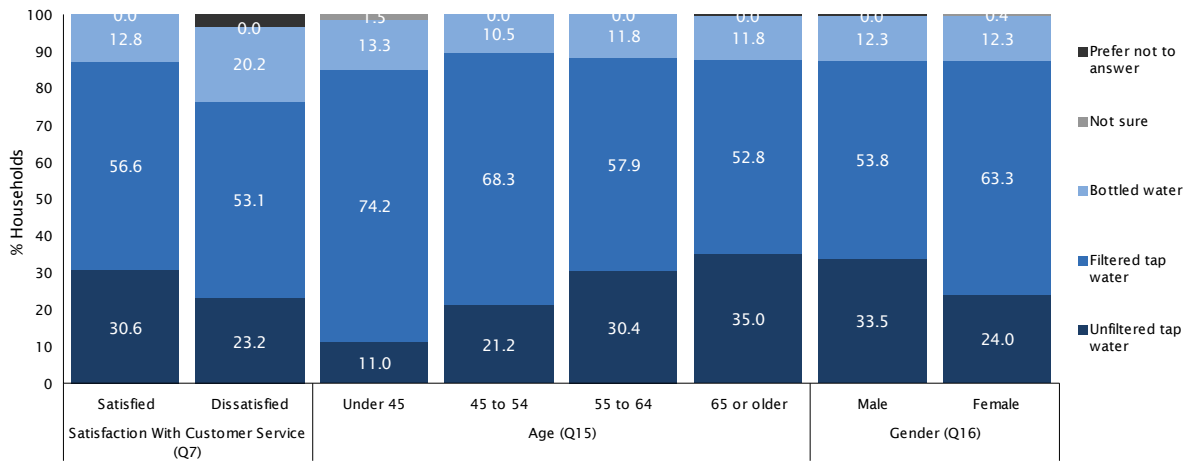


FIGURE 35 PRIMARY TYPE OF DRINKING WATER BY SATISFACTION WITH CUSTOMER SERVICE, AGE & GENDER





BACKGROUND & DEMOGRAPHICS

TABLE 16 DEMOGRAPHICS OF SAMPLE

<i>Total Respondents</i>	<i>51.9</i>
Age (Q15)	
Under 45	11.9
45 to 54	11.5
55 to 64	23.2
65 or older	45.5
Prefer not to answer	8.0
Gender (QD2)	
Male	49.5
Female	46.9
Non-binary	0.0
Prefer not to answer	3.6
Ethnicity (Q19)	
Caucasian / White	69.9
Latino / Hispanic	7.0
Asian American	5.3
Other / Mixed	5.7
Prefer not to answer	12.1
Hsld income (Q20)	
Less than \$60K	8.4
\$60K to < \$100K	11.7
\$100K to < \$150K	11.1
\$150K to < \$200K	12.1
\$200K or more	25.3
Prefer not to answer	31.5
Average Bill Amount	
Less than \$190	23.1
\$190 to \$209	27.7
\$210 to \$239	23.7
\$240 or more	24.7
No recent bill data on file	0.8
City of Residence	
Folsom	18.6
Granite Bay	64.2
Orangevale	14.5
Roseville	2.7

Table 16 presents the key demographic information collected during the survey. The primary motivation for collecting the background and demographic information was to provide a better insight into how the results of the substantive questions of the survey vary by demographic characteristics.



M E T H O D O L O G Y

The following sections outline the methodology used in the study, as well as the motivation for using certain techniques.

QUESTIONNAIRE DEVELOPMENT Dr. McLarney of True North Research worked closely with San Juan Water District to develop a questionnaire that covered the topics of interest and avoided many possible sources of systematic measurement error, including position-order effects, wording effects, response-category effects, scaling effects, and priming. Several questions included multiple individual items. Because asking items in a set order can lead to a systematic position bias in responses, items were asked in random order for each respondent.

Some questions asked in this study were presented only to a subset of respondents. For example, only respondents who indicated that they were familiar with San Juan Water District (Question 2) were asked if they had a favorable or unfavorable opinion of the District (Question 3). The questionnaire included with this report (see *Questionnaire & Toplines* on page 33) identifies the skip patterns used during the interview to ensure that each respondent received the appropriate questions.

PROGRAMMING, PRE-TEST & TRANSLATION Prior to fielding the survey, the questionnaire was CATI (Computer Assisted Telephone Interviewing) programmed to assist interviewers when conducting the phone interviews. The CATI program automatically navigates the skip patterns, randomizes the appropriate question items, and alerts interviewers to certain types of keypunching mistakes should they happen during the interview. The survey was also programmed into a passcode-protected online survey application to allow online participation for sampled customers. The integrity of the questionnaire was pre-tested internally by True North and by dialing into random homes in the District's service area prior to formally beginning the survey. The final questionnaire was also professionally translated into Spanish to allow for data collection in English and Spanish.

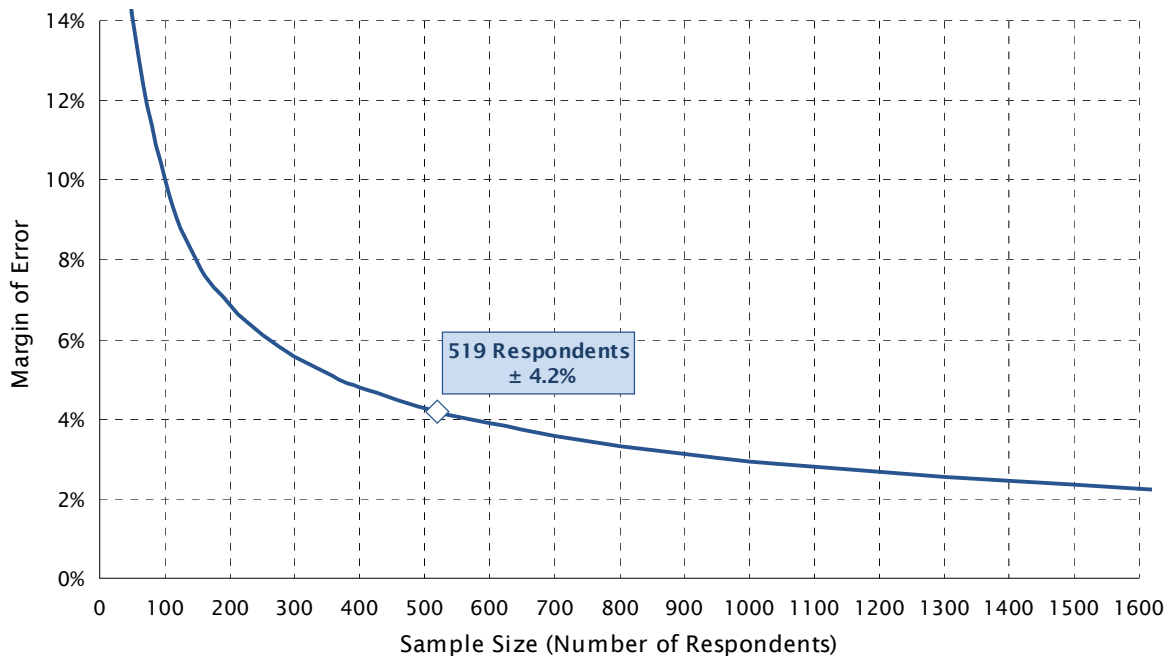
SAMPLE, RECRUITING & DATA COLLECTION Using the District's customer database as a starting point, customers were first stratified by area of residence and the amount of their average bi-monthly bill, then randomly selected for inclusion in the sample. This ensured that all customers had an equal probability of being included in the study, while also maintaining the proper balance of customers by geography and how much they pay for water services. Once selected, customers were recruited to participate in the survey through multiple recruiting methods. Customers were initially invited to participate in the survey online at a secure, passcode-protected website designed and hosted by True North. Individuals were recruited using email invitations and text invitations, and each customer was assigned a unique passcode to ensure that only San Juan Water District customers who received an invitation could access the online survey site, and that the survey could be completed only one time per passcode. Email reminder notices were also sent to encourage participation among those who had yet to take the survey. Following a period of online data collection, True North placed telephone calls to land lines and cell phone numbers of customers who had yet to participate in the online survey or for whom only telephone contact information was available.

Telephone interviews averaged 14 minutes in length and were conducted during weekday evenings (5:30PM to 9PM) and on weekends (10AM to 5PM). It is standard practice not to call during the day on weekdays because most working adults are unavailable and thus calling during those hours would bias the sample. A total of 519 completed surveys were gathered between June 13 and June 16, 2024.

MARGIN OF ERROR DUE TO SAMPLING The results of the survey can be used to estimate the opinions of all customer households within the District’s service area. Because not every customer in the service area participated in the survey, however, the results have what is known as a statistical margin of error due to sampling. The margin of error refers to the difference between what was found in the survey of 519 customers for a particular question and what would have been found if all 10,992 retail residential accounts had been interviewed.¹

Figure 36 provides a plot of the *maximum* margin of error in this study. The maximum margin of error for a dichotomous percentage result occurs when the answers are evenly split such that 50% provide one response and 50% provide the alternative response. For this survey, the maximum margin of error is $\pm 4.2\%$ for questions answered by all 519 respondents.

FIGURE 36 MAXIMUM MARGIN OF ERROR



Within this report, figures and tables show how responses to certain questions varied by customer characteristics such as most recent bill, age, and number of household members. Figure 36 is thus useful for understanding how the maximum margin of error for a percentage estimate will grow as the number of individuals asked a question (or in a particular subgroup) shrinks. Because the margin of error grows exponentially as the sample size decreases, the reader should

1. This figure is estimated based on the number of residential customer accounts in San Juan Water District’s customer database, which is a proxy for households.

use caution when generalizing and interpreting the results for small subgroups as the margin of error for small subgroups can be $\pm 10\%$ or more.

DATA PROCESSING Data processing consisted of checking the data for errors or inconsistencies, coding and recoding responses, categorizing verbatim responses, weighting, and preparing frequency analyses and crosstabulations.

ROUNDING Numbers that end in 0.5 or higher are rounded up to the nearest whole number, whereas numbers that end in 0.4 or lower are rounded down to the nearest whole number. These same rounding rules are also applied, when needed, to arrive at numbers that include a decimal place in constructing figures and tables. Occasionally, these rounding rules lead to small discrepancies in the first decimal place when comparing tables and charts for a given question. Due to rounding, some figures and narrative include numbers that add to more than or less than 100%.

QUESTIONNAIRE & TOPLINES



*San Juan Water District
Customer Survey
Final Toplines (n=519)
May 2024*

Section 1: Introduction to Study

Hi, may I please speak with _____? Hi, name is _____ and I'm calling on behalf of your water provider – San Juan Water District. We're conducting a short survey of customers and we would like to get your opinions.

If needed: This is a survey about your water services – I'm NOT trying to sell anything and I won't ask for a donation. Your answers will be confidential.

If needed: The survey should take about 12 minutes to complete.

If needed: If now is not a convenient time, can you let me know a better time so I can call back?

Section 2: Satisfaction with Water Services

Q1	To begin, who typically pays the utility bills in your household? Is it you, someone else, or do you share that responsibility?			
	1	I do	77%	
	2	Someone else	8%	
	3	Shared responsibility	13%	
	99	Prefer not to answer	1%	
Q2	How familiar are you with the San Juan Water District ? Would you say you are very familiar, somewhat familiar, a little familiar, or not at all familiar?			
	1	Very familiar	33%	Ask Q3
	2	Somewhat familiar	42%	Ask Q3
	3	A little familiar	20%	Ask Q3
	4	Not at all familiar	5%	Skip to Q4
	98	Not sure	0%	Skip to Q4
	99	Prefer not to answer	0%	Skip to Q4
Q3	Do you have a favorable or unfavorable opinion of the San Juan Water District? <i>Get answer, then ask:</i> Would that be very (favorable/unfavorable) or somewhat (favorable/unfavorable)?			
	1	Very favorable	33%	
	2	Somewhat favorable	39%	
	3	Somewhat unfavorable	9%	
	4	Very unfavorable	5%	
	98	Not sure/No opinion	12%	
	99	Prefer not to answer	1%	

Q4	Generally speaking, are you satisfied or dissatisfied with the overall services provided by the San Juan Water District? <i>Get answer, then ask:</i> Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?							
	1	Very satisfied					50%	
	2	Somewhat satisfied					35%	
	3	Somewhat dissatisfied					7%	
	4	Very dissatisfied					3%	
	98	Not sure					5%	
	99	Prefer not to answer					1%	
Q5	Next, I am going to read you a series of statements people may make about the San Juan Water District. For each one, please tell me if you agree or disagree with the statement. Here is the (first/next) one: _____. Do you agree or disagree with this statement? <i>Get answer, then ask:</i> Would that be strongly (agree/disagree) or somewhat (agree/disagree)?							
	<i>Randomize</i>		Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	Not sure	Prefer not to answer
A	San Juan Water District does a good job of providing a reliable water supply		69%	25%	3%	1%	2%	0%
B	The water we receive from San Juan Water District is safe to drink		63%	23%	3%	3%	8%	0%
C	I would rather drink bottled water than San Juan water		14%	15%	21%	43%	4%	2%
D	The amount I pay for my water service is reasonable		11%	35%	26%	23%	4%	0%
E	San Juan Water District provides adequate payment options		42%	29%	5%	4%	17%	2%
F	San Juan Water District keeps us well-informed about capital improvement projects, including improvements to the water treatment plant, pipelines and other portions of the water system, and how these improvements benefit customers.		34%	37%	12%	6%	12%	1%
G	Capital improvement projects in San Juan Water District personally benefit me and my family		22%	35%	9%	5%	29%	1%
H	The water pressure in my home is consistently strong.		59%	27%	6%	6%	1%	0%
I	San Juan Water District understands the needs and concerns of people like me		23%	39%	11%	8%	17%	1%

Section 3: Customer Service										
Q6	Over the past two years , have you had contact with San Juan Water District customer service ?									
	1	Yes		41%	Ask Q7					
	2	No		55%	Skip to Q9					
	98	Not sure		4%	Skip to Q9					
	99	Prefer not to answer		0%	Skip to Q9					
Q7	Overall, were you satisfied or dissatisfied with the service you received from San Juan Water District customer service ? <i>Get answer, then ask:</i> Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?									
	1	Very satisfied		60%						
	2	Somewhat satisfied		24%						
	3	Somewhat dissatisfied		10%						
	4	Very dissatisfied		5%						
	98	Not sure		0%						
	99	Prefer not to answer		0%						
Q8	Thinking of the customer service representatives you dealt with, would you rate their _____ as excellent, good, fair, poor, or very poor?									
	<i>Randomize</i>			Excellent	Good	Fair	Poor	Very poor	Not sure	Prefer not to answer
A	Courtesy			60%	30%	5%	1%	2%	1%	0%
B	Professionalism			60%	32%	5%	1%	2%	1%	0%
C	Willingness to help			56%	26%	9%	3%	3%	2%	0%
D	Knowledge			52%	31%	7%	2%	2%	5%	0%
E	Timeliness			53%	33%	8%	2%	2%	1%	0%
F	Competence			53%	31%	8%	3%	2%	3%	0%

Section 4: Communication

Next, I have a few questions about your communication preferences.

Q9	Overall, would you prefer to have more information about your water district, less information, or is the amount you receive about right ? <i>Get answer, if more or less, ask: Would that be much (more/less) information or somewhat (more/less) information?</i>			
	1	Much more information	8%	Ask Q10
	2	Somewhat more information	22%	Ask Q10
	3	About right	65%	Skip to Q11
	4	Somewhat less information	1%	Skip to Q11
	5	Much less information	0%	Skip to Q11
	98	Not sure	4%	Skip to Q11
	99	Prefer not to answer	0%	Skip to Q11
Q10	What types of information would you like to receive more of from your water district? <i>Verbatim responses recorded and later grouped into categories shown below.</i>			
		Future, current capital improvements, projects	23%	
		Cost, rate increases, billing info	21%	
		Water quality, where it comes from	18%	
		Conservation, programs, rebates	18%	
		Not sure / Cannot think of anything specific	16%	
		Everything pertinent, general water info	9%	
		Water usage	5%	
		District fiscal management, budgeting	5%	
		Testing of minerals, chemicals	5%	
		Leak detection	2%	
		Advance notices for water service shutdown, interruptions	2%	
		Irrigation services	1%	

Q11 Next, I am going to mention different types of information on services your water district may provide you. For each, please tell me if you are very interested, somewhat interested, or not interested in receiving information on this service.						
		Very interested	Somewhat interested	Not interested	Not sure	Prefer not to answer
	<i>Randomize</i>					
A	Discounts for low-income customers	16%	16%	59%	6%	3%
B	Water efficiency resources such as workshops, kits, rebates, and free irrigation audits	34%	41%	23%	3%	1%
C	Community education events such as tours or open houses at water district facilities	16%	38%	41%	4%	1%
D	Notification when there are spikes in water usage in your household	63%	25%	10%	1%	1%
Q12 As I read the following ways that the water district can communicate with customers, I'd like to know if you think they would be a very effective, somewhat effective, or not at all effective way for the District to communicate with <u>you</u> . Here is the (first/next) one: _____. Would this be a very effective, somewhat effective, or not at all effective way for the District to communicate with you?						
		Very	Somewhat	Not at all	Not sure / Prefer not to answer	
	<i>Randomize</i>					
A	Direct mailings separate from your water bill	26%	43%	28%	4%	
B	Social media such as Facebook, X, Instagram, YouTube, or TikTok	6%	26%	59%	9%	
C	Newspapers (print or online)	5%	20%	65%	9%	
D	Water District's website	22%	44%	29%	6%	
E	Email	43%	40%	14%	2%	
F	An insert in your water bill	41%	34%	21%	3%	
G	Electronic Newsletter	26%	45%	24%	4%	
H	Nextdoor website	10%	29%	49%	13%	
I	Virtual Townhall where you can participate online or by telephone	7%	40%	44%	10%	

Q13	How would you prefer the Water District contact you in the case of an emergency that requires you to take immediate action? Any other ways? <i>Check all mentions.</i>		
	1	Facebook	2%
	2	X (Twitter)	1%
	3	Email	36%
	4	Text message	86%
	5	Automated phone call	50%
	6	Nextdoor	2%
	98	Not sure	1%
	99	Prefer not to answer	0%

Section 5: Background & Demographics

Thank you so much for your participation. I have just a few background questions for statistical purposes.

Q14	What kind of water do you primarily drink at home? Unfiltered tap water, filtered tap water, or bottled water?		
	1	Unfiltered tap water	28%
	2	Filtered tap water	58%
	3	Bottled water	13%
	98	Not sure	0%
	99	Prefer not to answer	0%

Q15	In what year were you born? Year recoded into age groups shown below.		
	18 to 24		1%
	25 to 34		4%
	35 to 44		6%
	45 to 54		11%
	55 to 64		23%
	65 or older		45%
	Prefer not to answer		8%

Q16	What is your gender?		
	1	Male	50%
	2	Female	47%
	3	Non-binary	0%
	99	Prefer not to answer	4%

Q17	Do you own or rent your primary place of residence?		
	1	Own	98%
	2	Rent	0%
	3	Live with family / friends and don't pay rent	0%
	99	Prefer not to answer	2%
Q18	Which of the following best describes your current home?		
	1	Single family detached home	97%
	2	Condominium or townhome	1%
	3	Apartment	0%
	4	Mobile home	0%
	99	Prefer not to answer	1%
Q19	What ethnic group do you consider yourself a part of or feel closest to? <i>Read list if respondent hesitates</i>		
	1	Caucasian/White	70%
	2	Latino/Hispanic	7%
	3	African-American/Black	1%
	4	American Indian or Alaskan Native	0%
	5	Asian -- Korean, Japanese, Chinese, Vietnamese, Filipino, Indian, or other Asian	5%
	6	Pacific Islander	0%
	7	Mixed Heritage	2%
	98	Other	3%
	99	Prefer not to answer	12%
Q20	I have just one more question for you for statistical reasons. I am going to read some income categories. Please stop me when I reach the category that best describes your total household income before taxes.		
	1	Less than \$30,000	2%
	2	\$30,000 to less than \$60,000	6%
	3	\$60,000 to less than \$100,000	12%
	4	\$100,000 to less than \$150,000	11%
	5	\$150,000 to less than \$200,000	12%
	6	\$200,000 or more	25%
	98	Not sure	1%
	99	Prefer not to answer	31%

Those are all of the questions that I have for you! Thanks so much for participating in this important survey!

Post-Interview & Sample Items

Post-Interview & Sample Items		
S1	Average Bill Amount	
	Less than \$190	23%
	\$190 to \$209	28%
	\$210 to \$239	24%
	\$240 or more	25%
	No recent bill data	1%
S2	City of Residence	
	Folsom	19%
	Granite Bay	64%
	Orangevale	14%
	Roseville	3%