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2023 Voice of Customer Survey



Report of Findings

24 February 2023
Confidential & Proprietary

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Project Overview

- GreatBlue Research was commissioned by the Los Alamos County Department of Public Utilities (hereinafter “the DPU”) to conduct market research to understand their customers' perceptions of the utility and services provided.
- The primary goals for this research study were to assess overall satisfaction with the DPU, satisfaction with the quality and reliability of the DPU's services, and customers' perception of the DPU's communication platforms.
- In order to service these research goals, GreatBlue Research employed telephone and digital survey methodologies to capture the opinions of residential and commercial customers of the DPU.
- The outcome of this research will enable the DPU to a) more clearly understand, and ultimately set, customer expectations, b) act on near-term opportunities for improvement, and c) create a strategic roadmap to increase customer satisfaction.



Areas of Investigation

The Los Alamos County Department of Public Utilities Voice of Customer Survey leveraged a quantitative research methodology to address the following areas of investigation:

- Ratings of the DPU's organizational characteristics
- Satisfaction with the quality of services received from DPU
- Satisfaction with the reliability of services received from DPU
- Satisfaction with customer service and field service personnel
- Satisfaction with the rates paid for the quality of service received
- Awareness and importance that the DPU is a Community-Owned Municipal Utility
- Current and preferred methods of receiving information about DPU
- Satisfaction with the quality of communication received from DPU
- Satisfaction with the DPU's website's ease of navigation and content
- Use and satisfaction with the DPU's self-service portal
- Demographic and firmographic profiles of respondents

Research Methodology Snapshot - Residential

Methodology Digital	No. of Completes 681	No. of Questions 50*	Incentive None	Sample Customer List
Target Residential customers	Quality Assurance Dual-level**	Margin of Error 3.4%	Confidence Level 95%	Research Dates January 4 - February 6, 2023

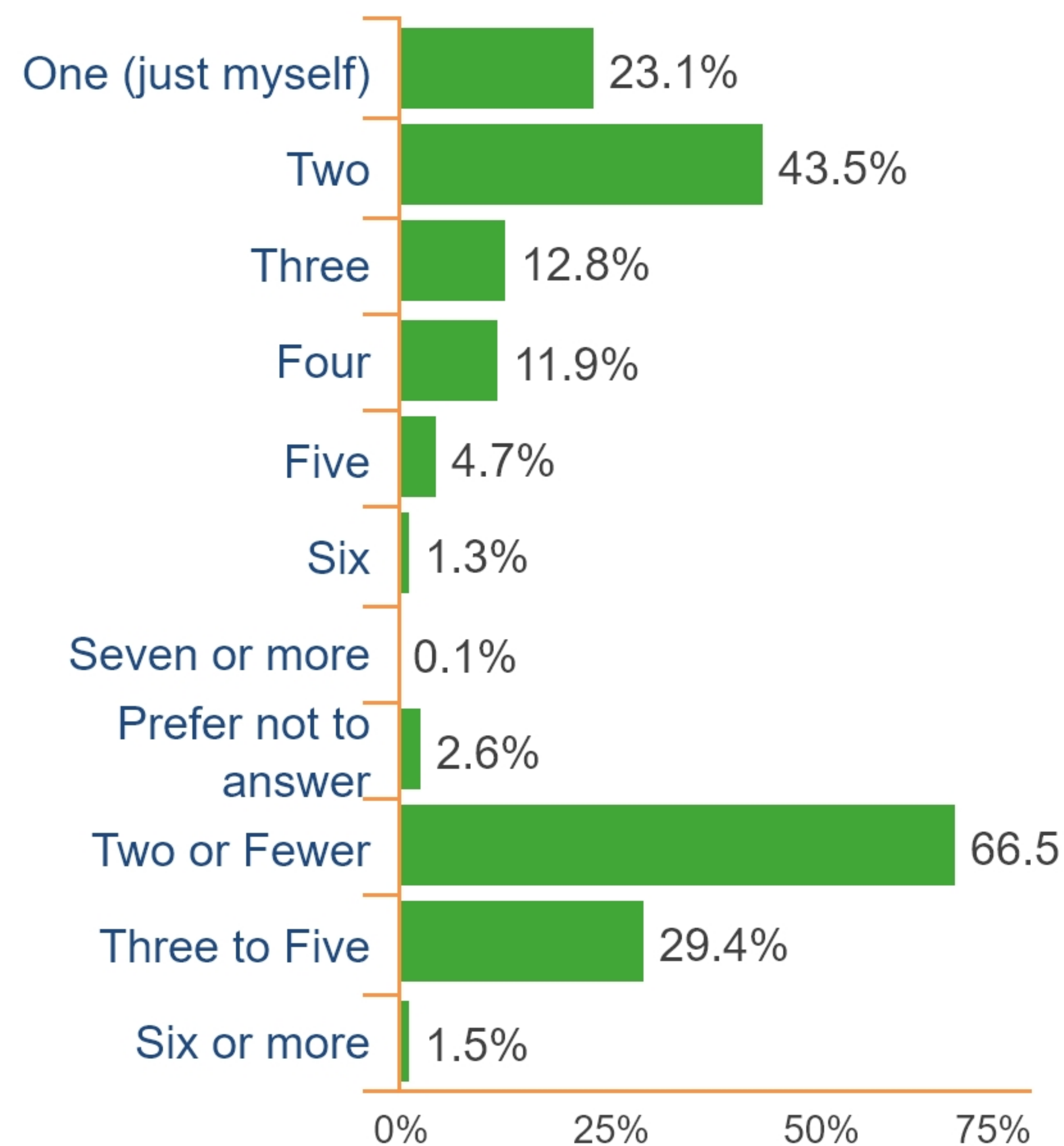
* This represents the total possible number of questions; not all respondents will answer all questions based on skip patterns and other instrument bias.

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

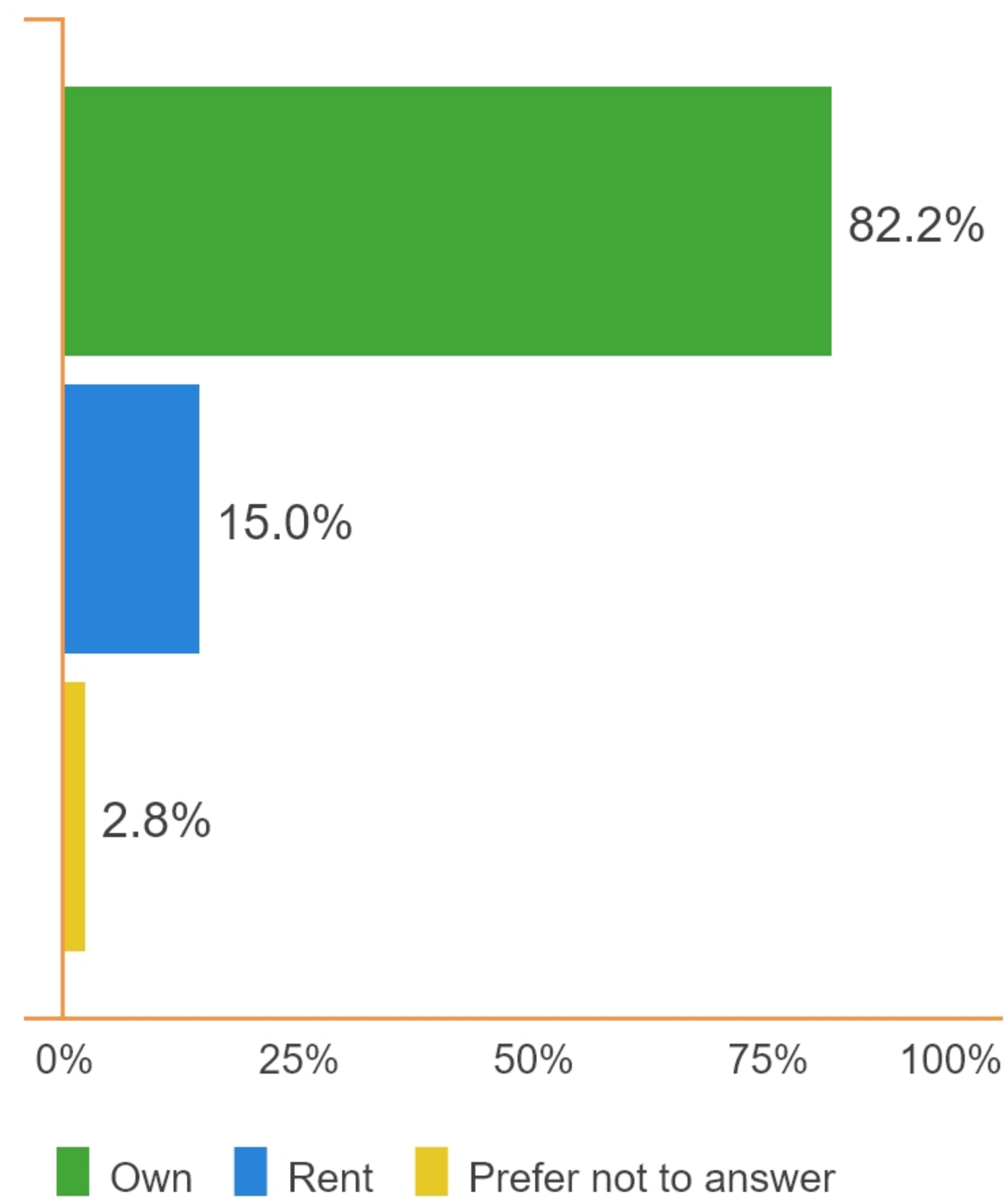
Respondent Snapshot

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

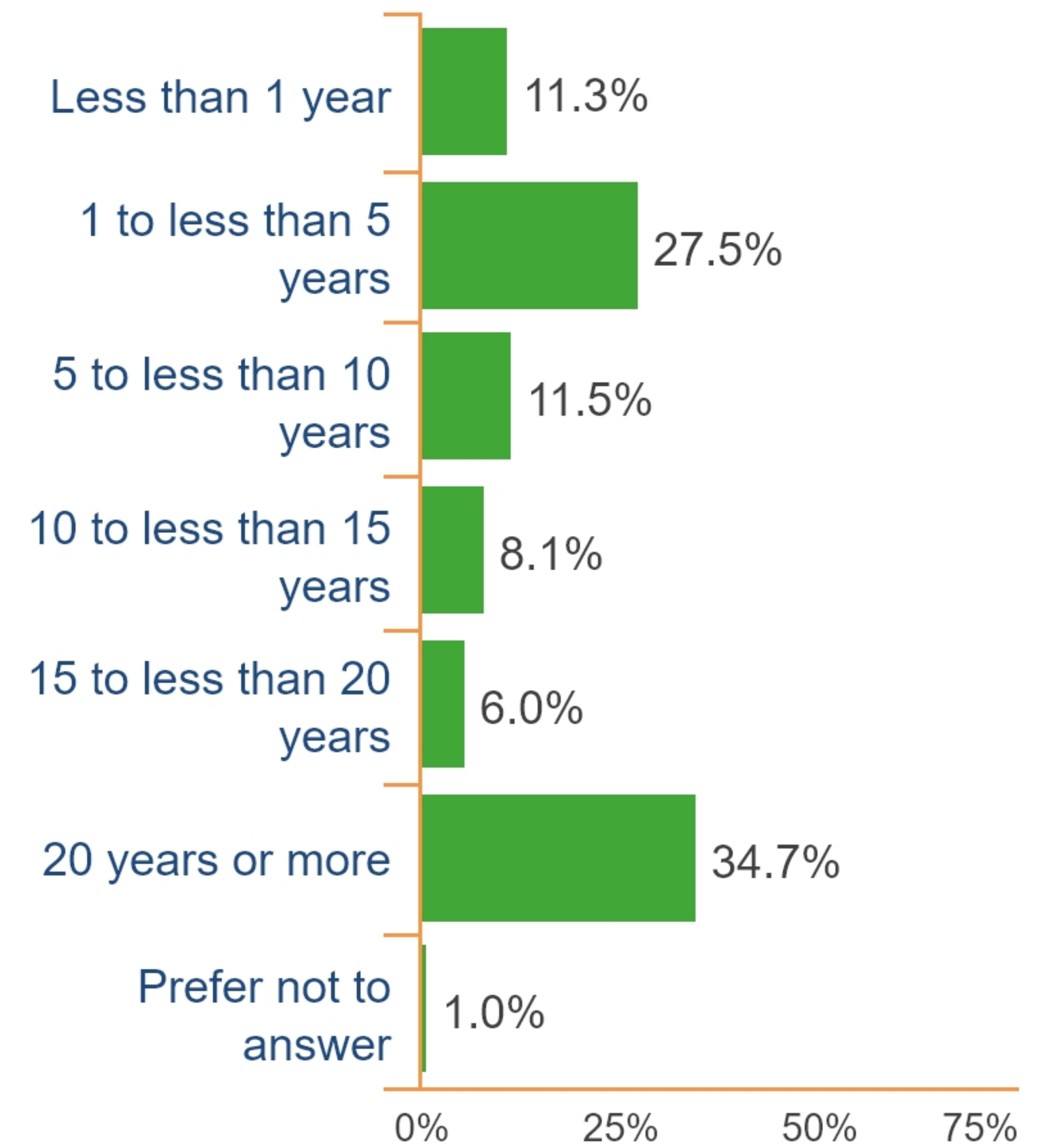
Household Size



Rent or Own



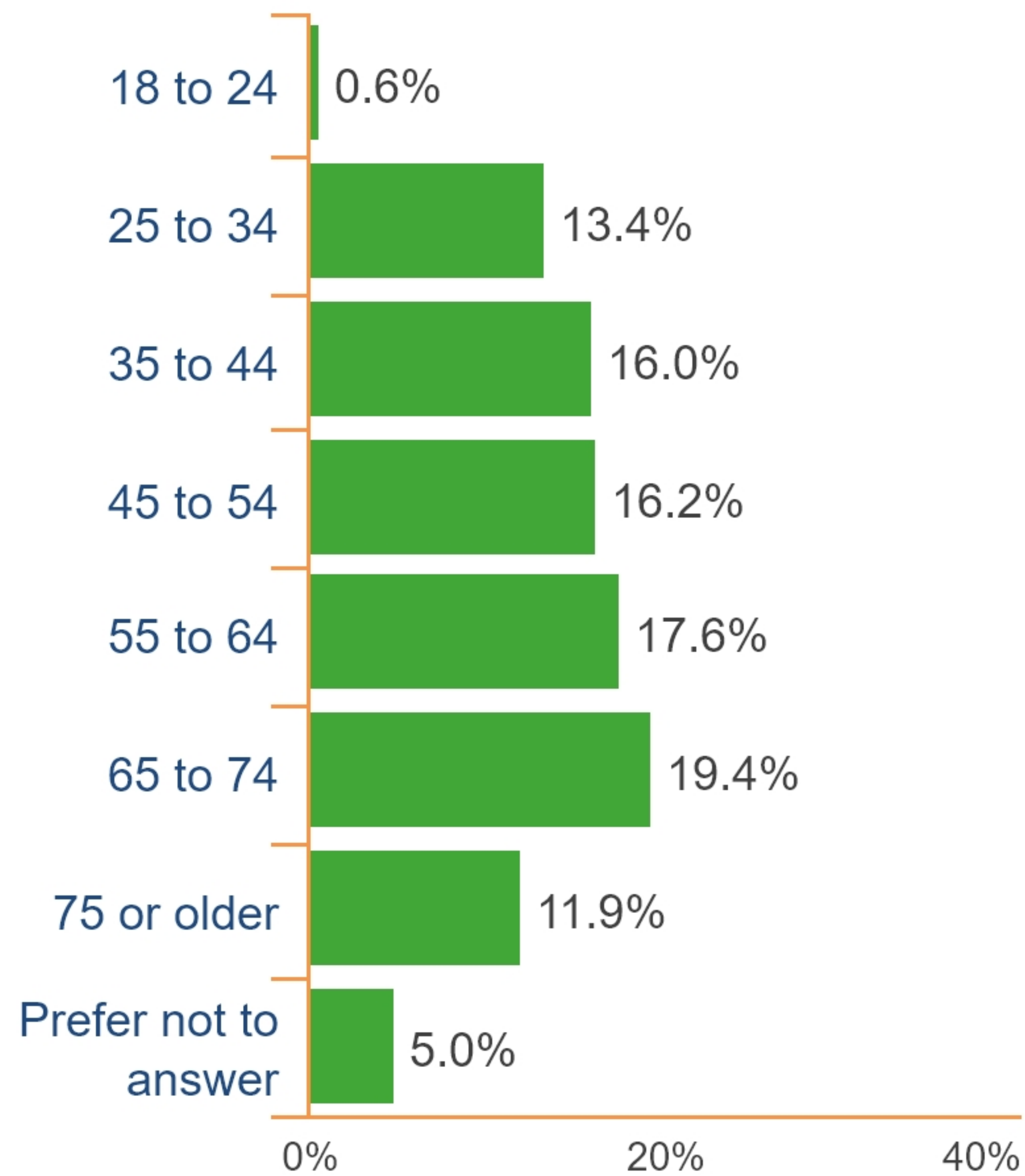
Length of Time as Customer



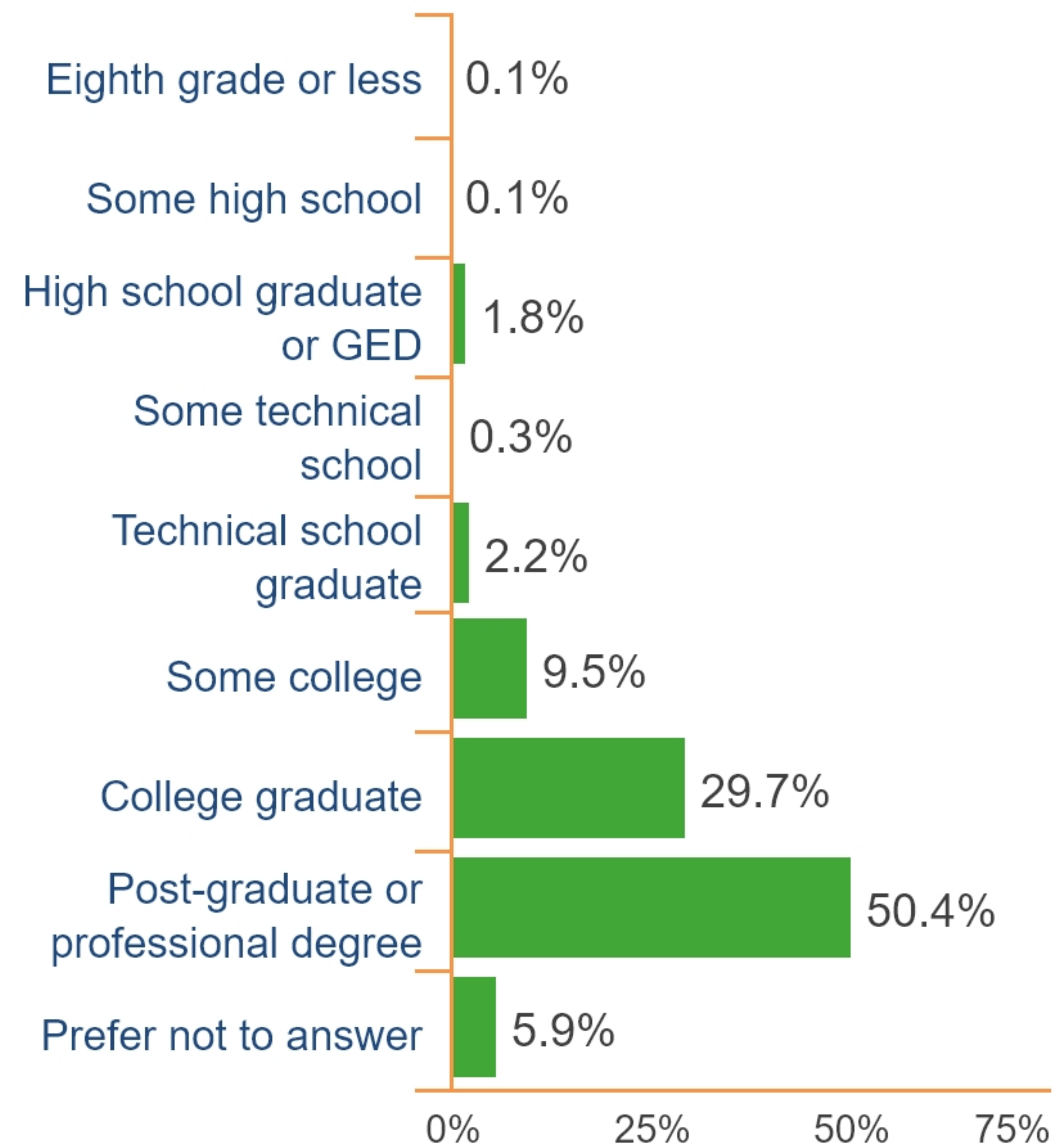
Respondent Snapshot

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

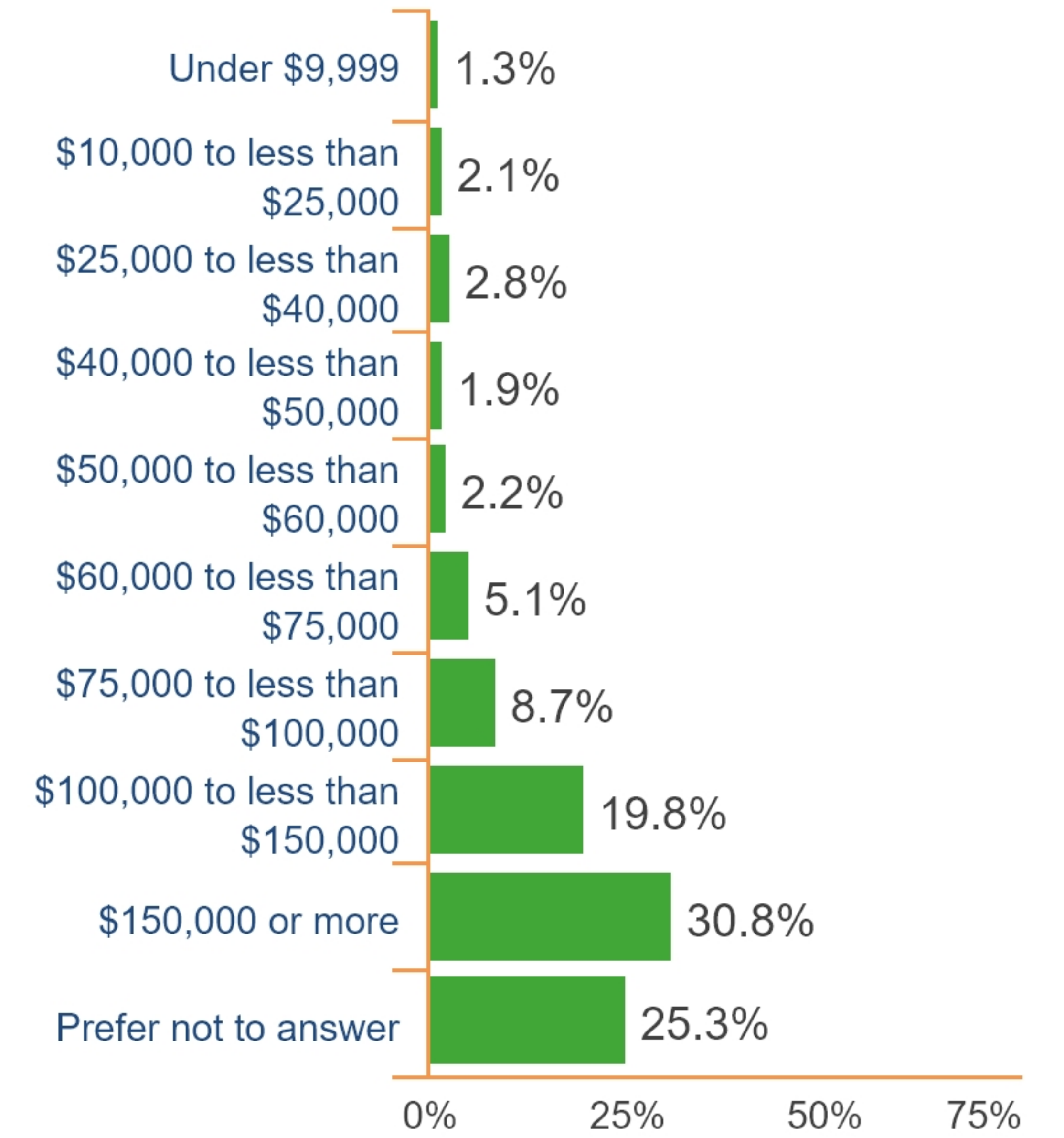
Age



Education



Income



Research Methodology Snapshot: Commercial

Methodology Digital / Telephone	No. of Completes 39 (25 phone + 14 online)	No. of Questions 42*	Incentive None	Sample Customer List
Target Commercial customers	Quality Assurance Dual-level**	Margin of Error 14.9%	Confidence Level 95%	Research Dates January 4 - February 6, 2023

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

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

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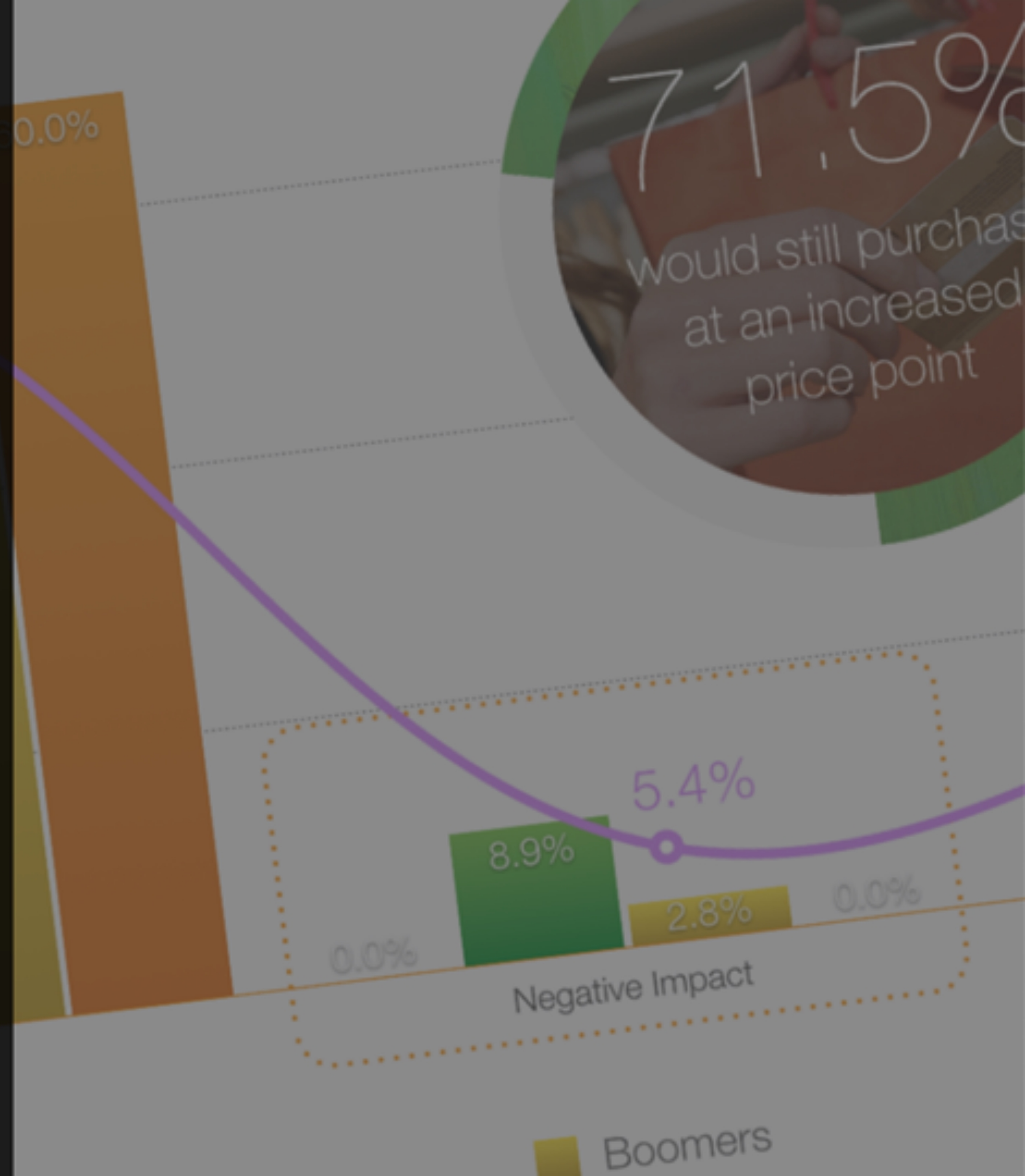
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Key Study Findings - Gain Feedback from Businesses About Reliability Issues



What we learned:

The DPU received decreased ratings from commercial respondents for their satisfaction with the reliability of DPU's natural gas service (-17.7 percentage points) and water service (-12.6 percentage points).

Takeaway:

Commercial customers are decreasingly finding DPU's natural gas and water services to be reliable.

Actionable strategy:

Knowing that natural gas and water are critical resources for many businesses, it is recommended that the DPU investigate any specific issues businesses have experienced over the past year that have resulted in decreased satisfaction with the reliability of the DPU's services. This may be accomplished through in-depth interviews with any commercial customers who reported lower levels of satisfaction with the DPU's natural gas or water service. The moderators of these interviews may ask participants to explain specific instances where they either experienced issues with their water supply or natural gas availability that resulted in reduced satisfaction with the reliability of the DPU's services.

Key Study Findings - *Educate About Community Ownership Model*



What we learned:

Residential (65.3% from 67.7% in 2022) and commercial (59.0% from 68.4% in 2022) respondents reported decreased awareness that the DPU is a Community-Owned Municipal Utility. Despite this, the majority of respondents (85.3% residential, 87.2% commercial) reported it is important to maintain local control of their municipal utility.

Takeaway:

While customers continue to find local and community ownership of their utility company to be important, fewer customers are aware that the DPU is a Community-Owned Municipal Utility.

Actionable strategy:

It is recommended that the DPU increase its communication to customers about its ownership structure in order to improve awareness that the DPU is a Community-Owned Municipal Utility. This may be done through providing educational materials that detail the benefits of being a customer of a Community-Owned Municipal Utility, such as lower rates, greater reliability of service and the ability for customers to be more involved in utility operations through attendance at board meetings.

Key Study Findings - Encourage Greater Use of Automated Metering Portal



What we learned:

One-fifth of residents (20.3%) and 17.9% of businesses reported they have used the DPU's Automated Metering Portal. Additionally, less than three-fifths of respondents (56.4% residential, 54.5% commercial) provided positive ratings for the DPU "helping customers conserve electricity, gas and water."

Takeaway:

There is a segment of customers who do not feel the DPU helps them to conserve electricity, gas and water, and the majority of customers are not using the Automated Metering Portal for the purpose of viewing and managing electric, gas and water usage.

Actionable strategy:

The DPU should increase its communication about the availability of the Automated Metering Portal and the ways customers can use this portal in order to view and manage their electric, gas and water usage, as this portal can serve as a tool for customers to conserve their usage and understand areas where they need to reduce their usage.

Ratings for Organizational Characteristics

When rating the DPU on a series of organizational characteristics, residential respondents provided an increased average positive rating of 69.8% (over 64.2% in 2022). Of note, residential respondents provided increased ratings for "community outreach" (+9.7 percentage points), "being transparent about company operations and policies" (+8.3 percentage points) and "helping customers conserve electricity, gas and water" (+7.8 percentage points). However, commercial respondents provided a decreased average rating of 63.8% (from 67.6% in 2022). Commercial respondents provided decreased ratings for "community outreach" (-20.7 percentage points), "providing good service and value for the cost of the service" (-10.9 percentage points) and "being transparent about company operations and policies" (-10.0 percentage points).

	Residential		Commercial		Public Power Data Source
	2022	2023	2022	2023	2022
Communicating with customers	73.4%	75.3%	64.7%	64.1%	67.9%
Responding promptly to customer questions and complaints	76.0%	79.8%	75.0%	66.7%	67.7%
Helping customers conserve electricity, gas, and water	48.6%	56.4%	50.0%	54.5%	58.2%
Being transparent about company operations and policies	52.6%	60.9%	60.0%	50.0%	63.1%
Providing good service and value for the cost of the service	59.5%	66.9%	71.4%	60.5%	63.6%
Community outreach	55.1%	64.8%	81.8%	61.1%	62.8%
Helpful and knowledgeable staff	79.5%	79.3%	71.4%	81.6%	67.6%
Overall satisfaction with DPU	69.1%	75.5%	66.7%	71.8%	68.3%
Average	64.2%	69.8%	67.6%	63.8%	64.9%

Poor Ratings Provided Due to Cost and Communication

Among the 155 residential respondents who provided poor ratings for DPU for any company characteristic, the majority indicated this is due to the "cost / too expensive" (15.5%), "frequent outages / unreliable service" (10.3%) or "poor communication / lack of information / not responsive" (10.3%).

Among the 10 commercial respondents who provided poor ratings for DPU for any company characteristic, respondents indicated this was because of the "cost / too expensive" (20.0%), "poor communication / lack of information / not responsive" (20.0%), "poor customer service / support" (10.0%), "billing issues" (10.0%) or "overall improvement needed" (10.0%).

Please indicate why you provided a poor rating for DPU?
(Top 13 values shown)

	2023	
	Residential	Commercial
Sample size	155	10
Cost / too expensive	15.5%	20.0%
Expressed multiple reasons	14.8%	0.0%
Frequent outages / unreliable service	10.3%	0.0%
Poor communication / lack of information / not responsive	10.3%	20.0%
Poor customer service / support	9.7%	10.0%
Billing issues	6.5%	10.0%
Need to provide conservation tips	4.5%	0.0%
Other	3.9%	20.0%
None / nothing	3.9%	10.0%
Average / nothing special	3.2%	0.0%
No outage notification system	2.6%	0.0%
Website is difficult to navigate / not user friendly	2.6%	0.0%
Overall improvement needed	2.6%	10.0%

Increased Satisfaction with Quality of Water and Wastewater Services

An increased frequency of residential respondents reported being satisfied with the quality of water (+3.1 percentage points) and wastewater (+1.7 percentage points) service they receive from DPU. While an increased frequency of commercial respondents reported being satisfied with the quality of the wastewater service they receive from DPU (+3.0 percentage points) a decreased frequency reported satisfaction with the quality of the water service they receive from DPU (-10.5 percentage points).

Q How satisfied are you with the **quality** of the service(s) you receive from DPU. (Total "satisfied") (w/o "don't know" and "N/A - I don't receive this service" responses)

	Residential		Commercial	
	2022	2023	2022	2023
Electric	87.1%	86.6%	83.3%	81.6%
Natural Gas	97.4%	97.9%	94.4%	88.2%
Water	92.3%	95.4%	100.0%	89.5%
Wastewater	94.7%	96.4%	88.2%	91.2%

Decreased Satisfaction with Reliability of Natural Gas and Water Services

While an increased frequency of residential respondents reported being satisfied with the reliability of the electric service they receive from DPU (+11.3 percentage points), a decreased frequency reported being satisfied with the reliability of the natural gas service they receive from DPU (-1.7 percentage points). A decreased frequency of commercial respondents reported being satisfied with the reliability of the water service (-15.8 percentage points) and natural gas service (-12.0 percentage points) they receive from DPU.

Please indicate how satisfied you are with the **reliability** of the service(s) you receive from DPU. (Total "satisfied") (w/o "don't know" and "N/A - I don't receive this service" responses)

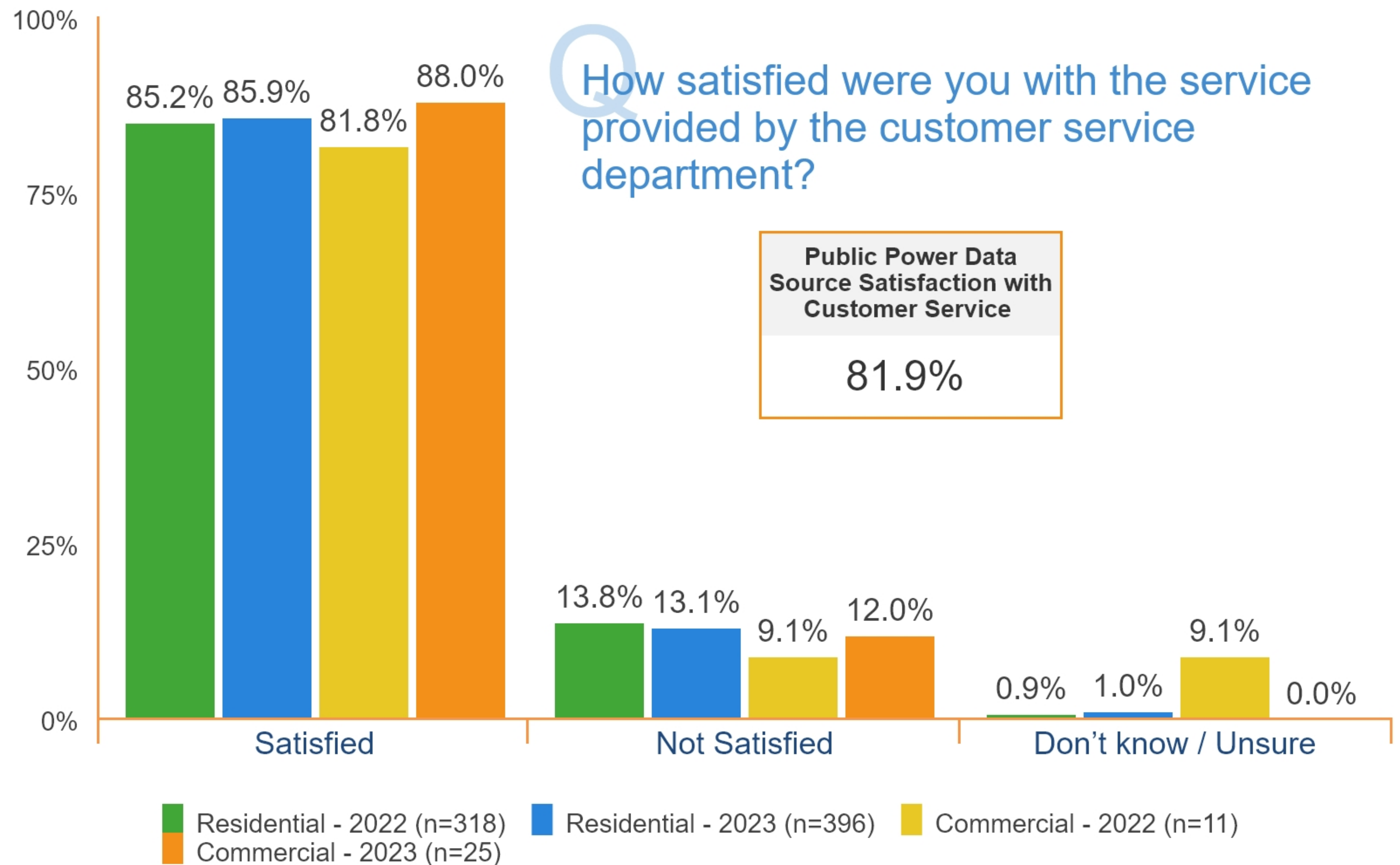
	Residential		Commercial	
	2022	2023	2022	2023
Electric	72.2%	83.5%	88.9%	84.2%
Natural Gas	99.1%	97.4%	94.4%	82.4%
Water	97.5%	96.1%	100.0%	84.2%
Wastewater	98.6%	97.2%	88.2%	84.8%

Satisfied with Customer Service Department

Among the 396 residential respondents who contacted DPU in the last 12 months, this was primarily for a "billing question" (24.7%), to "move in / out" (18.2%) or for a "payment or pay arrangement" (12.1%). Commercial customers who contacted DPU in the last 12 months primarily reported doing so for a "billing question" (48.0%) or an "electric service problem, question, issue or concern" (20.0%). The majority of residential (85.9% over 85.2% in 2022) and commercial (88.0% over 81.8% in 2022) respondents reported being satisfied with the service provided by the customer service department.

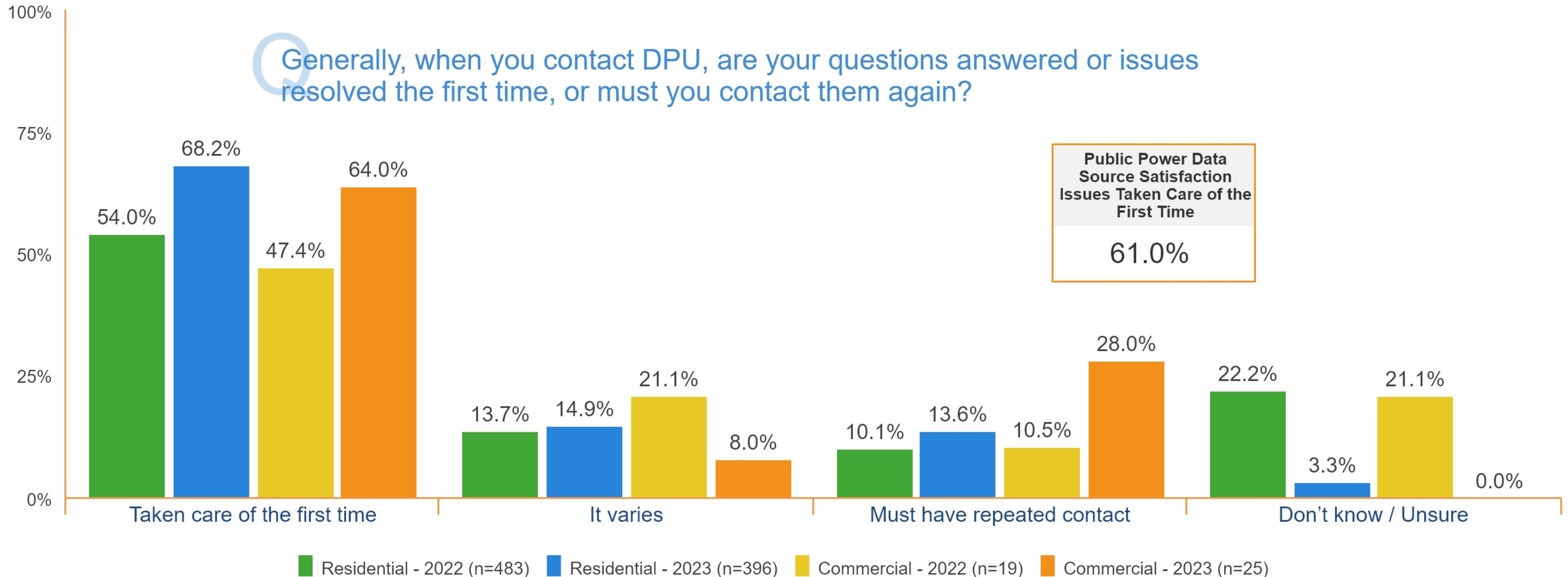
If you have recently contacted DPU in the last 12 months, what was the purpose of the contact? (Top 8 responses shown)

	2023	
	Residential	Commercial
<i>Sample size</i>	396	25
Billing question	24.7%	48.0%
Move in / out	18.2%	4.0%
Payment or pay arrangement	12.1%	4.0%
Electric service problem, question, issue, or concern	11.6%	20.0%
Trash or recycling concern	9.8%	0.0%
Update account details	7.6%	16.0%
Water service problem, question, issue, or concern	5.6%	8.0%
Other (please specify):	5.6%	0.0%



More Issues Taken Care of the First Time

An increased frequency of residential respondents (68.2% over 54.0% in 2022) and commercial respondents (64.0% over 47.4% in 2022) indicated when they contact DPU, their questions or issues are "taken care of the first time," with fewer respondents reporting they are "unsure." Of note, a higher rate of commercial respondents (28.0% over 10.5% in 2022) reported a need for having repeated contact when they contact DPU. The rate of DPU respondents who reported their issues are "taken care of the first time" is higher than the national Public Power Data Source average (61.0%).

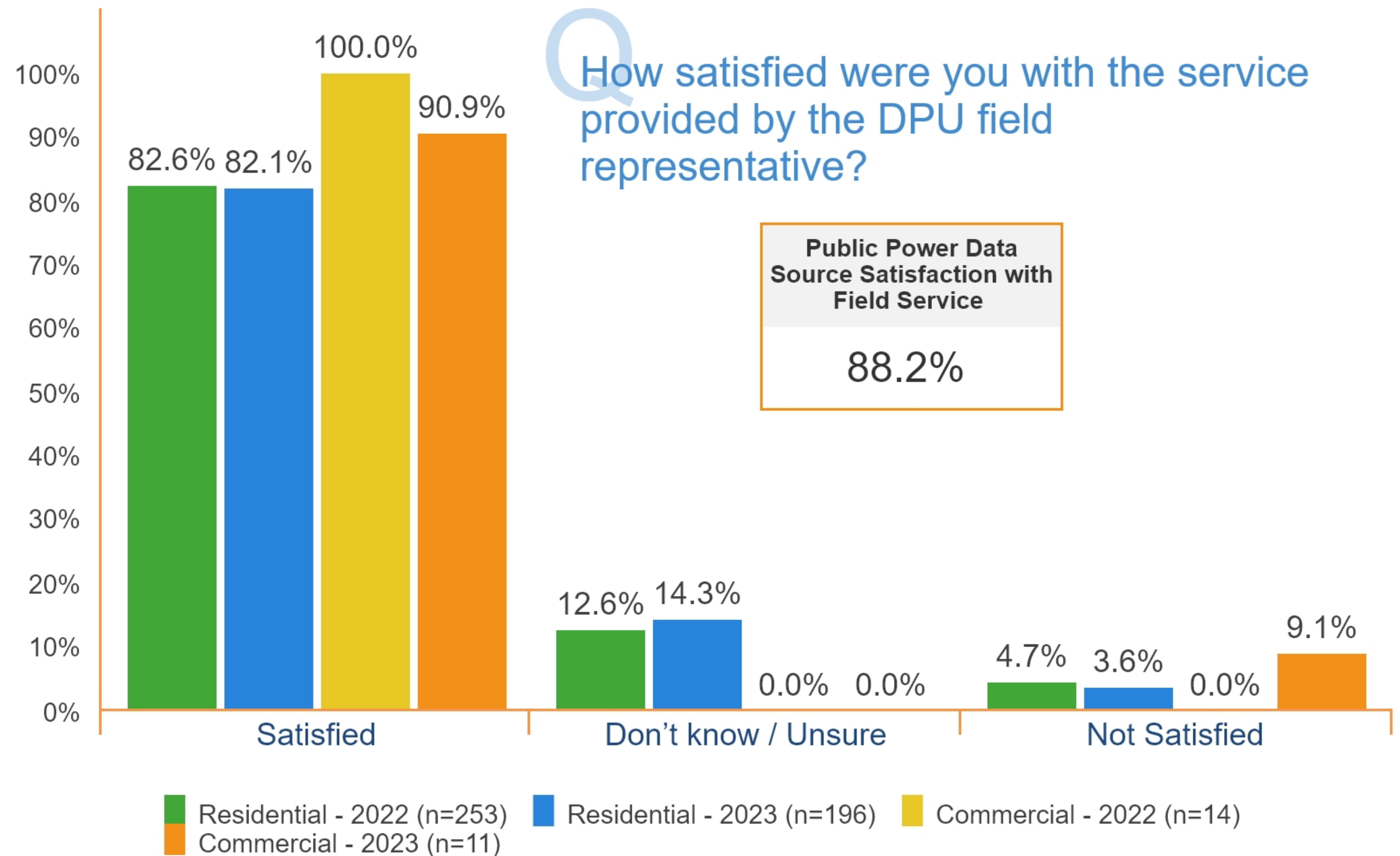


Satisfied with Field Service Representatives

Among those respondents who indicated a field representative visited their home in the last 12 months, reasons for the visit included a "meter reading" (49.0% residential, 27.3% commercial) or for a "service problem / repair" (20.4% residential, 27.3% commercial). Over four-fifths of residential respondents (82.1% from 82.6% in 2022) and nine-out-of-ten commercial respondents (90.9% from 100.0% in 2022) who had a field representative visit reported they were satisfied with the service provided.

Q If a field representative visited your home in the last 12 months, what was the purpose of the visit?

	2023	
	Residential	Commercial
Sample size	196	11
Meter reading	49.0%	27.3%
Service problem/repair	20.4%	27.3%
Other (please specify):	17.9%	36.4%
Install / update meter	8.2%	0.0%
Outage restoration	4.6%	9.1%



Decreased Satisfaction with Quality of Natural Gas for Price Paid

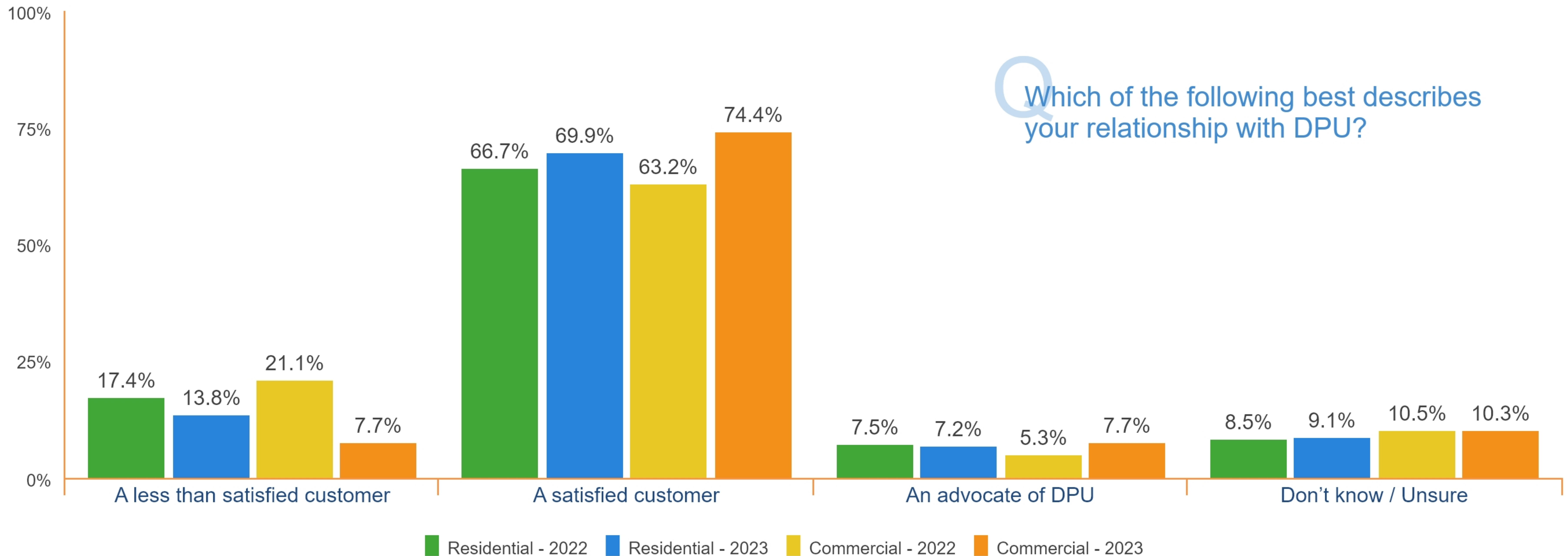
While an increased frequency of residential respondents (+1.2 percentage points) reported being satisfied with the quality of wastewater service they receive from the DPU for the price they pay, a decreased frequency (-5.2 percentage points) reported being satisfied with the quality of natural gas service they receive from the DPU for the price they pay. Of note, a decreased frequency of commercial respondents (-23.5 percentage points) reported being satisfied with the quality of natural gas service they receive from DPU for the price they pay.

How satisfied are you with the rate you pay for the quality of service you receive for each of the four (4) services DPU provides? (Total "satisfied") (w/o "don't know" and "N/A - I don't receive this service" responses)

	Residential		Commercial	
	2022	2023	2022	2023
Electric	74.9%	76.1%	72.2%	73.7%
Natural Gas	78.4%	73.2%	88.2%	64.7%
Water	76.9%	76.8%	76.5%	64.9%
Wastewater	75.4%	75.2%	82.4%	72.7%

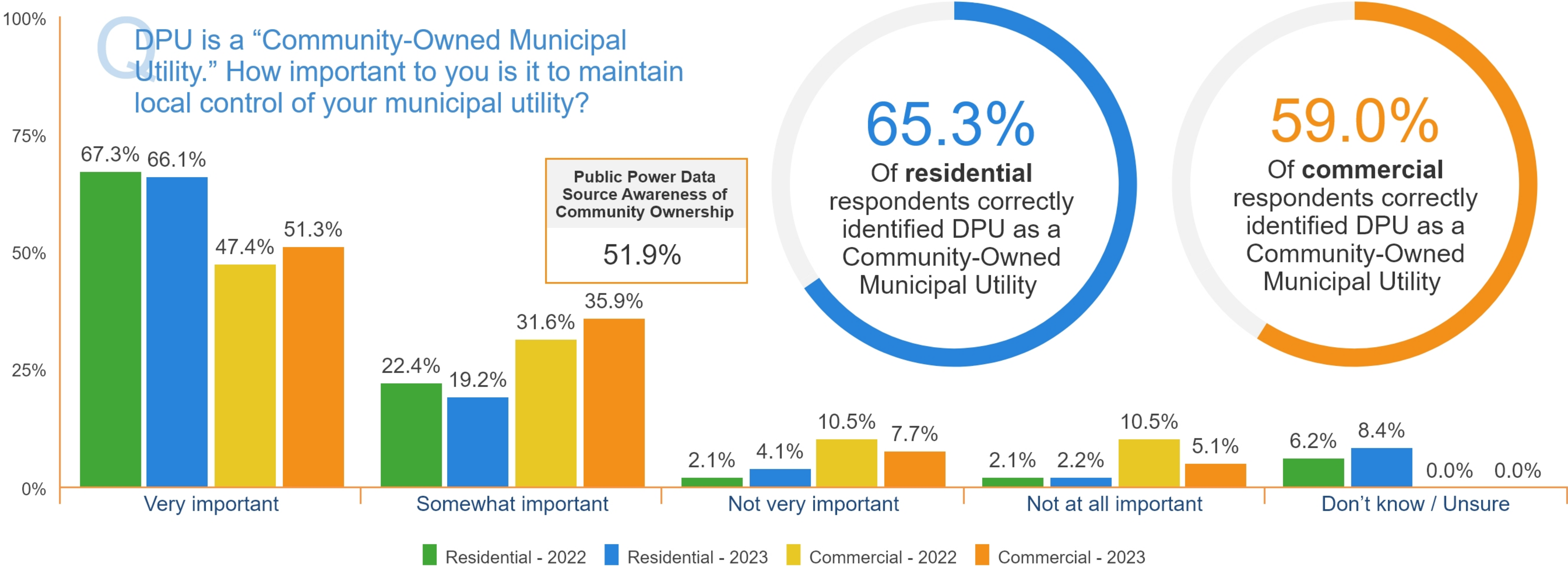
Increase in Net Positive Rating Among Customers

The DPU scored an increased net positive rating (satisfied + advocate) of 77.1% among residential respondents (over 74.2% in 2022) and 82.1% among commercial respondents (over 68.5% in 2022). Of note, over two-thirds of residential respondents (69.9%) and nearly three-quarters of commercial respondents (74.4%) reported being "a satisfied customer" of the DPU, while less than one-out-of-seven residents (13.8%) and less than one-tenth of businesses (7.7%) indicated they are "a less than satisfied customer."



Decreased Awareness of Community Ownership

Nearly two-thirds of residential respondents (65.3% from 67.7% in 2022) and nearly three-fifths of commercial respondents (59.0% from 68.4% in 2022) correctly identified DPU as a Community-Owned Municipal Utility. Additionally, over four-fifths of residential respondents (85.3% from 89.7% in 2022) and nearly nine-out-of-ten commercial respondents (87.2% over 79.0% in 2022) reported it is either "very important" or "somewhat important" to maintain local control of their municipal utility.



Prefer to Receive Information Through Email

Nearly three-fifths of residential respondents (56.5%) and three-out-of-ten commercial respondents (30.8%) reported currently receiving information about DPU through "bill inserts," while nearly one-half of businesses (46.2%) reported receiving information through the "mail." Nearly two-fifths of residential respondents (37.7%) and nearly one-quarter of commercial respondents (23.1%) reported a preference for receiving information about DPU through "email," while three-out-of-ten commercial respondents (30.8%) indicated they would prefer to receive information about DPU through the "mail."

Please tell me how you **currently** receive information about DPU? (Top 8 responses shown)

	Residential		Commercial	
	2022	2023	2022	2023
Bill inserts	44.9%	56.5%	26.3%	30.8%
DPU website	20.9%	36.1%	5.3%	23.1%
Newspaper	25.1%	33.6%	21.1%	17.9%
Email	22.2%	30.4%	26.3%	17.9%
Mail	19.0%	26.1%	21.1%	46.2%
Social Media (e.g., Facebook, Twitter)	17.6%	24.1%	0.0%	10.3%
Brochures	9.7%	19.7%	0.0%	10.3%
Word of mouth	8.5%	12.8%	5.3%	10.3%

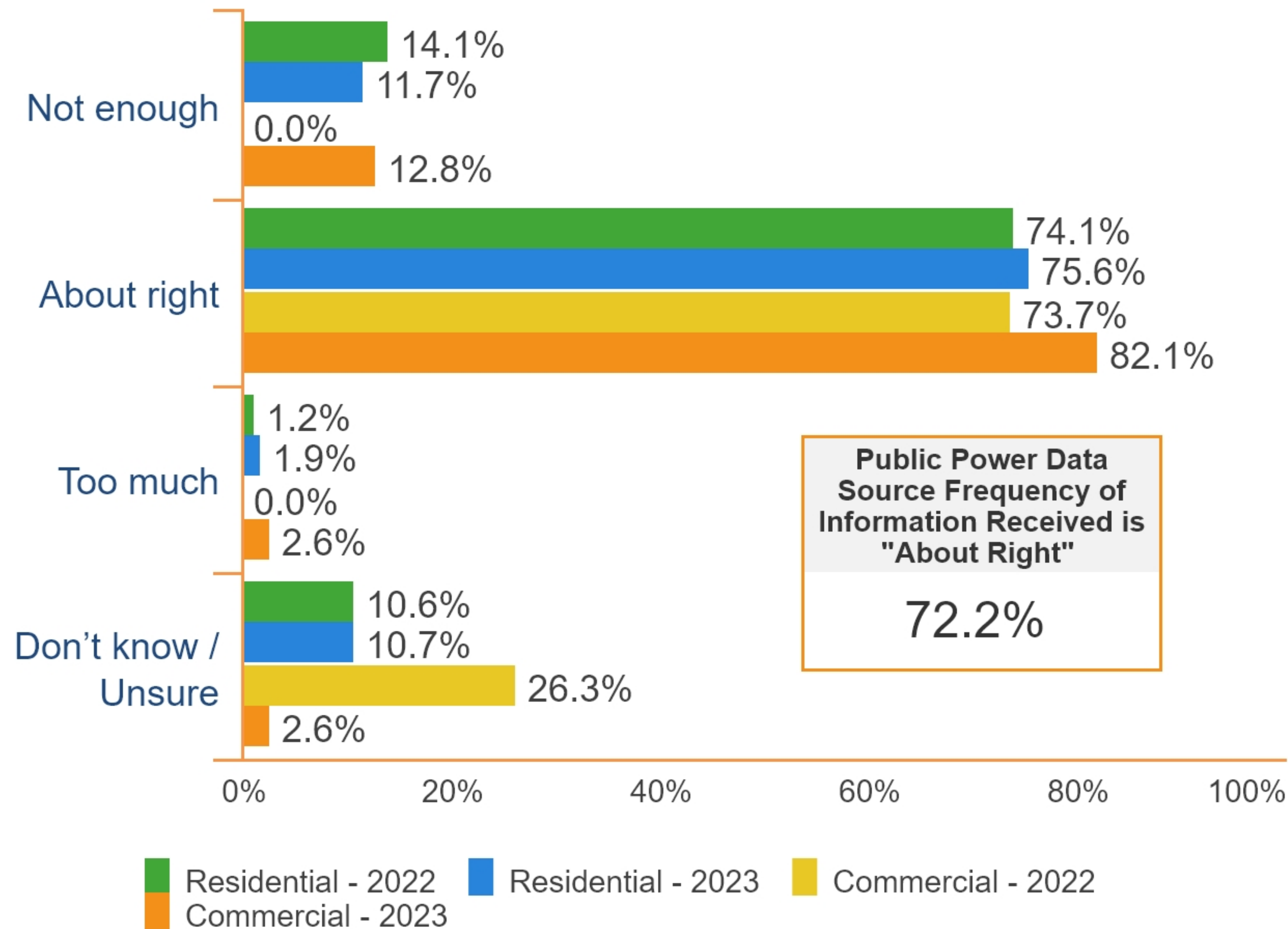
And, please tell me how you would **prefer** to receive information about DPU? (Top 8 responses shown)

	Residential		Commercial	
	2022	2023	2022	2023
Email	38.5%	37.7%	26.3%	23.1%
Bill inserts	24.8%	24.1%	15.8%	20.5%
Mail	8.9%	10.6%	10.5%	30.8%
DPU website	9.7%	8.8%	5.3%	5.1%
Social Media (e.g., Facebook, Twitter)	4.3%	4.8%	5.3%	2.6%
Newspaper	3.5%	4.6%	15.8%	0.0%
Don't look for information / Don't care to receive information	5.6%	4.4%	10.5%	7.7%
Other (please specify):	0.8%	2.8%	5.3%	7.7%

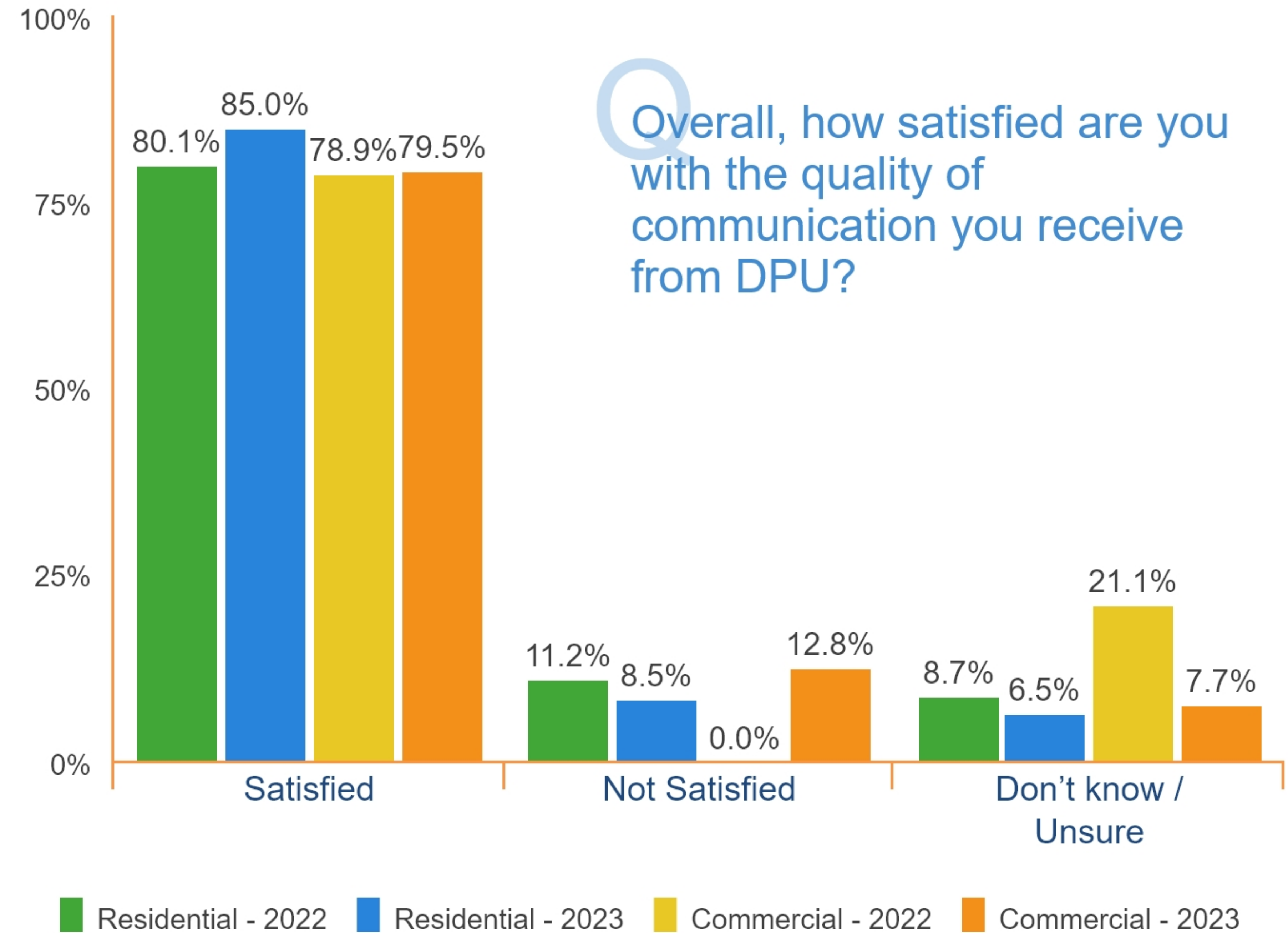
Satisfied with Quality of Communication Received

More than three-quarters of residential respondents (75.6% over 74.1% in 2022) and over four-fifths of commercial respondents (82.1% over 73.7% in 2022) indicated the frequency at which they receive information from DPU is "about right." Of note, 11.7% of residential and 12.8% of commercial respondents reported the frequency of receiving information is "not enough." Over four-fifths of residential respondents (85.0% over 80.1% in 2022) and nearly four-fifths of commercial respondents (79.5% over 78.9% in 2022) reported satisfaction with the quality of communication they receive from DPU.

How would you describe the frequency at which you receive information from DPU?

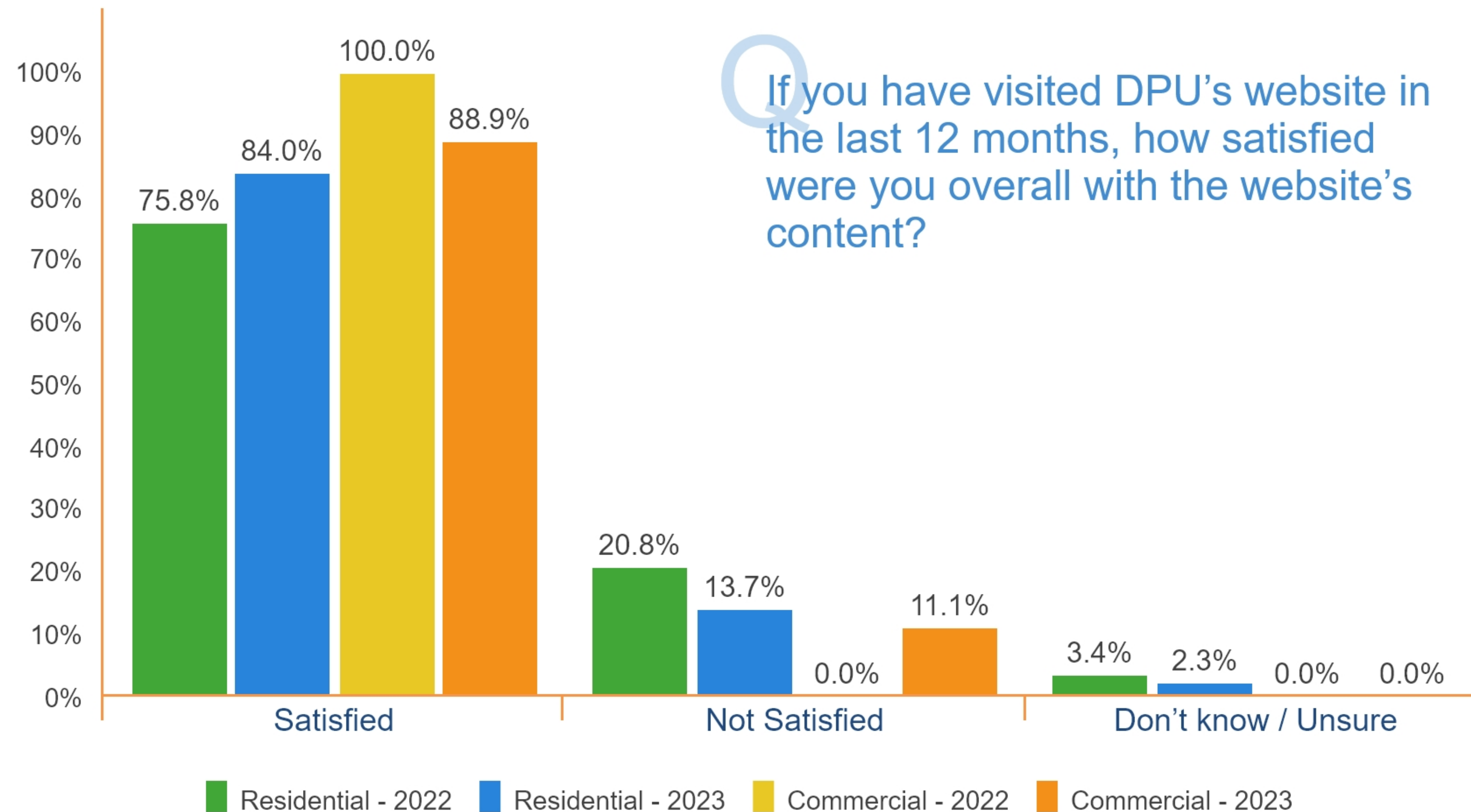


Overall, how satisfied are you with the quality of communication you receive from DPU?



Satisfied with Website's Content

Among those respondents who had visited DPU's website in the last 12 months, over four-fifths of residential respondents (84.0% over 75.8% in 2022) and nearly nine-out-of-ten commercial respondents (88.9% from 100.0% in 2022) reported they were "very satisfied" or "somewhat satisfied" with the website's content. Those respondents who reported being dissatisfied with the website's content indicated this is because the "website is difficult to use / not user friendly" (28.8% residential, 66.7% commercial), the "information not easily accessible" (22.7% residential) and it is "difficult to make payment" (16.7% residential).



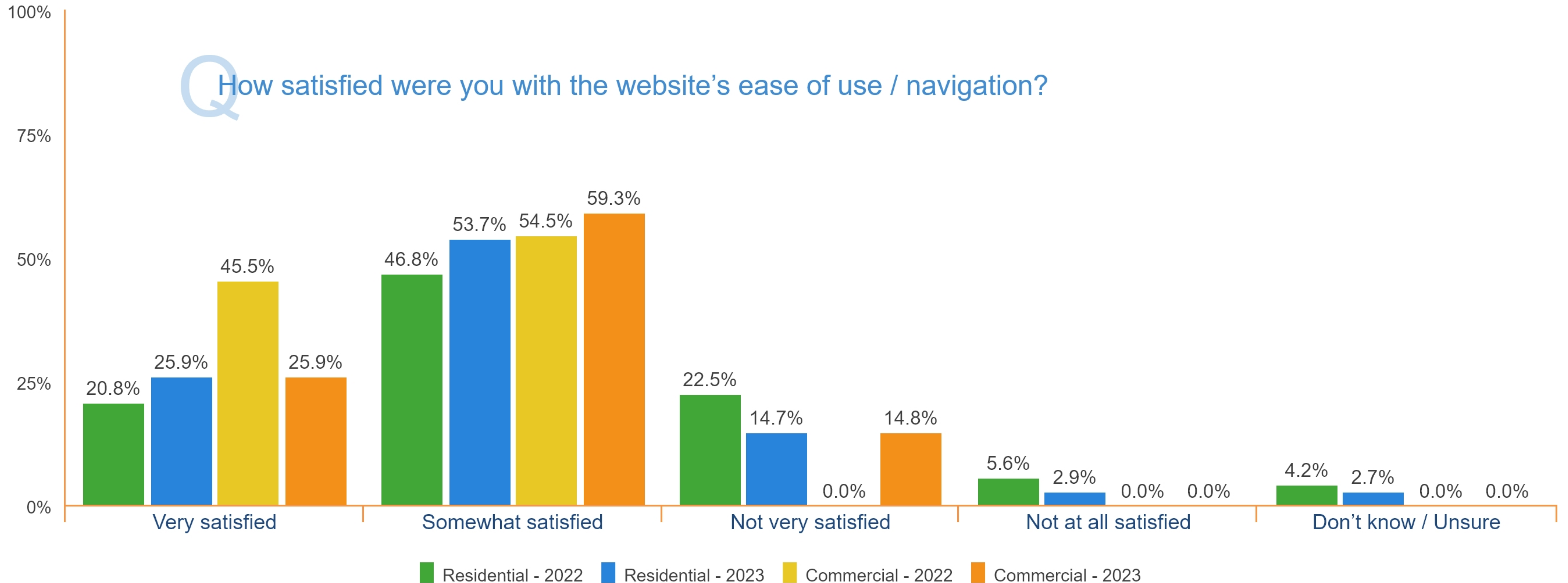
If you have visited DPU's website in the last 12 months, how satisfied were you overall with the website's content?

For what reasons were you dissatisfied with the website's content?

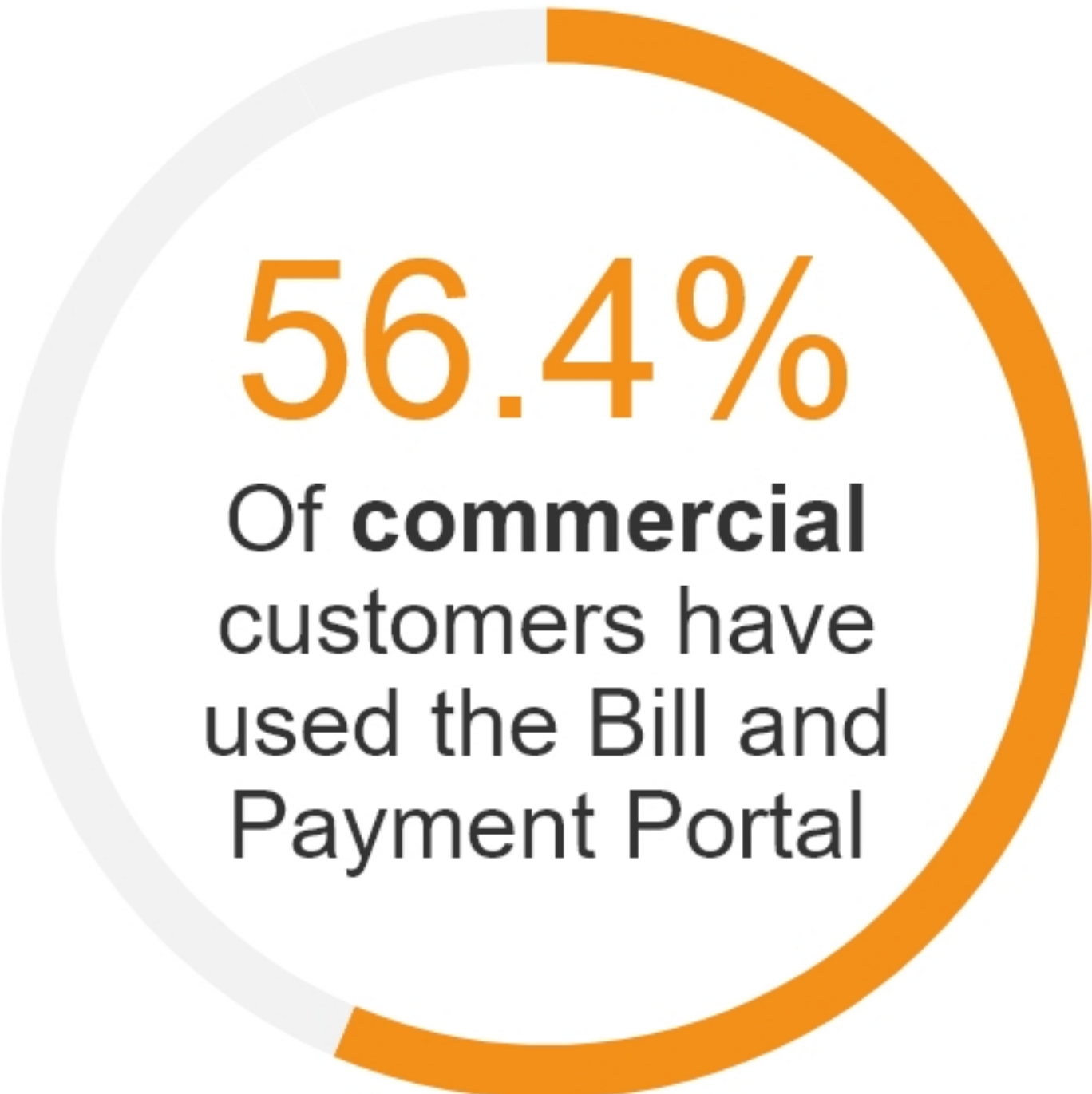
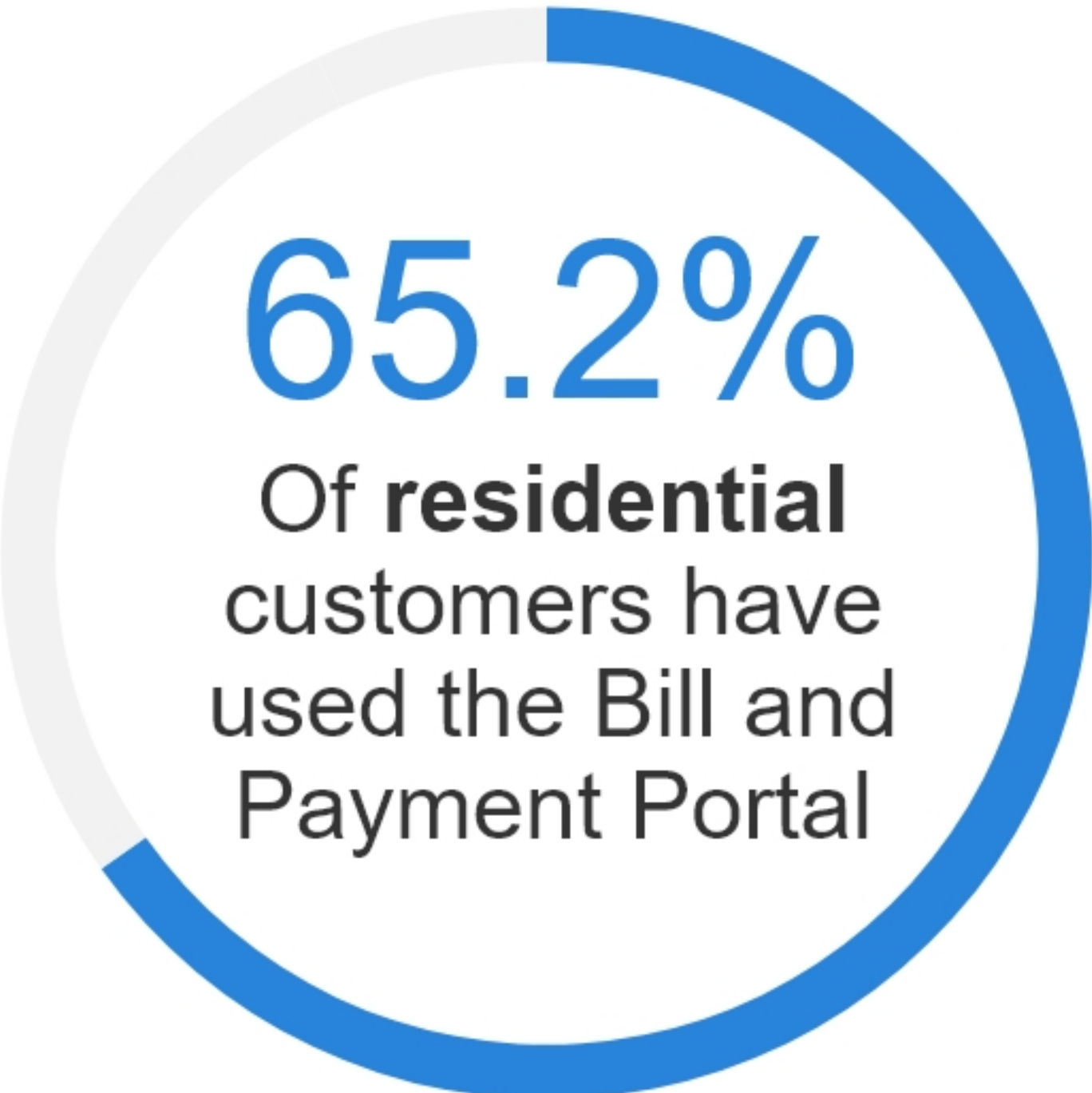
	2023	
	Residential	Commercial
Sample size	66	3
Website is difficult to use / not user friendly	28.8%	66.7%
Information not easily accessible	22.7%	0.0%
Difficult to make payment	16.7%	0.0%
Online billing needs updating / streamlining	7.6%	0.0%
Information is not up to date	7.6%	0.0%
Not enough information provided	4.5%	0.0%
Other	4.5%	33.3%

Residents Find Website Increasingly Easy to Use

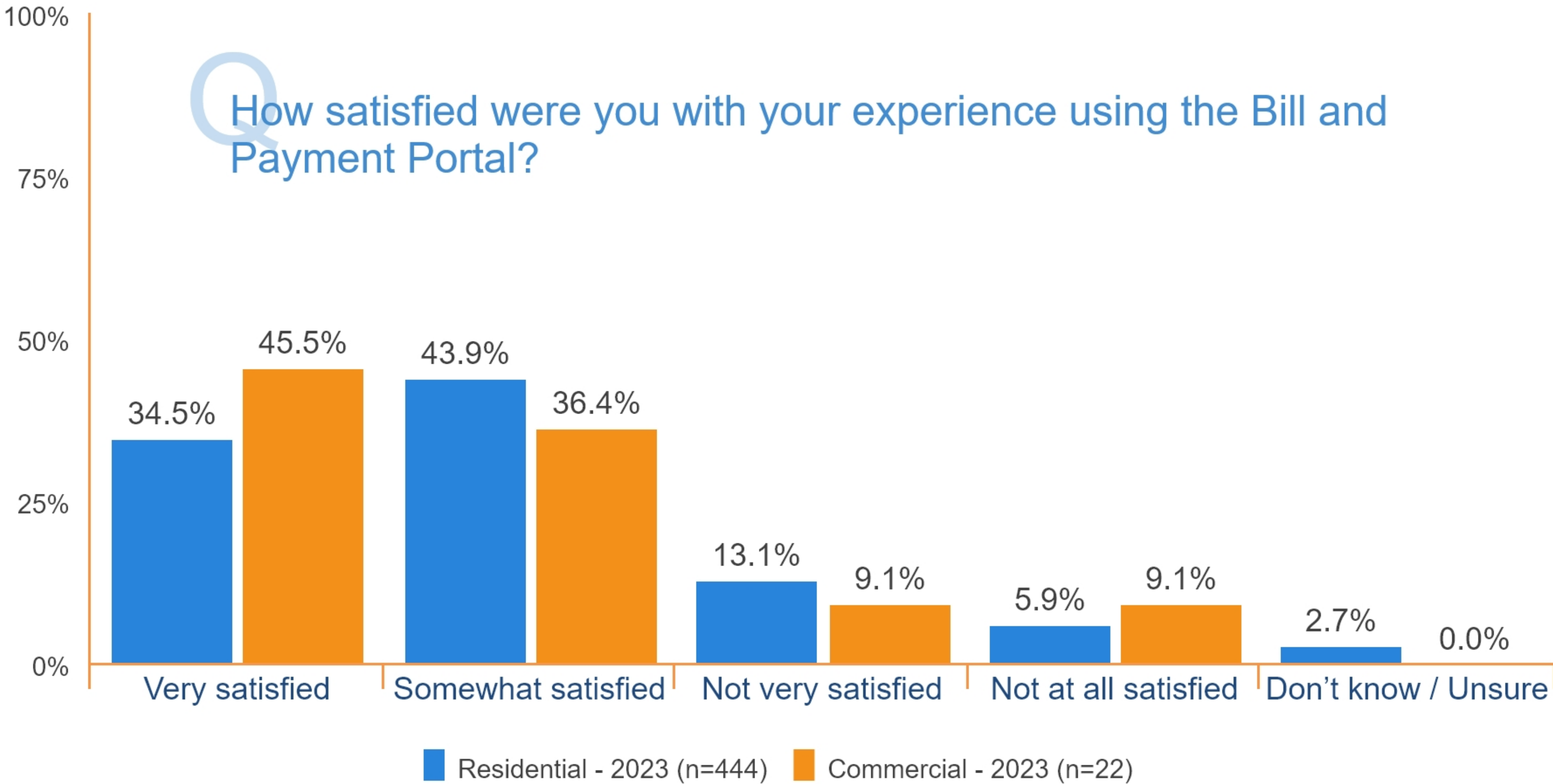
An increased frequency of residential respondents (79.6% over 67.6% in 2022) who have used the DPU's website in the past 12 months reported they were "very satisfied" or "somewhat satisfied" with the website's ease of use and navigation, while a decreased frequency of commercial respondents (85.2% from 100.0% in 2022) who have used the website in the past year reported satisfaction with its ease of use and navigation.



More Use of Bill and Payment Portal Among Residents

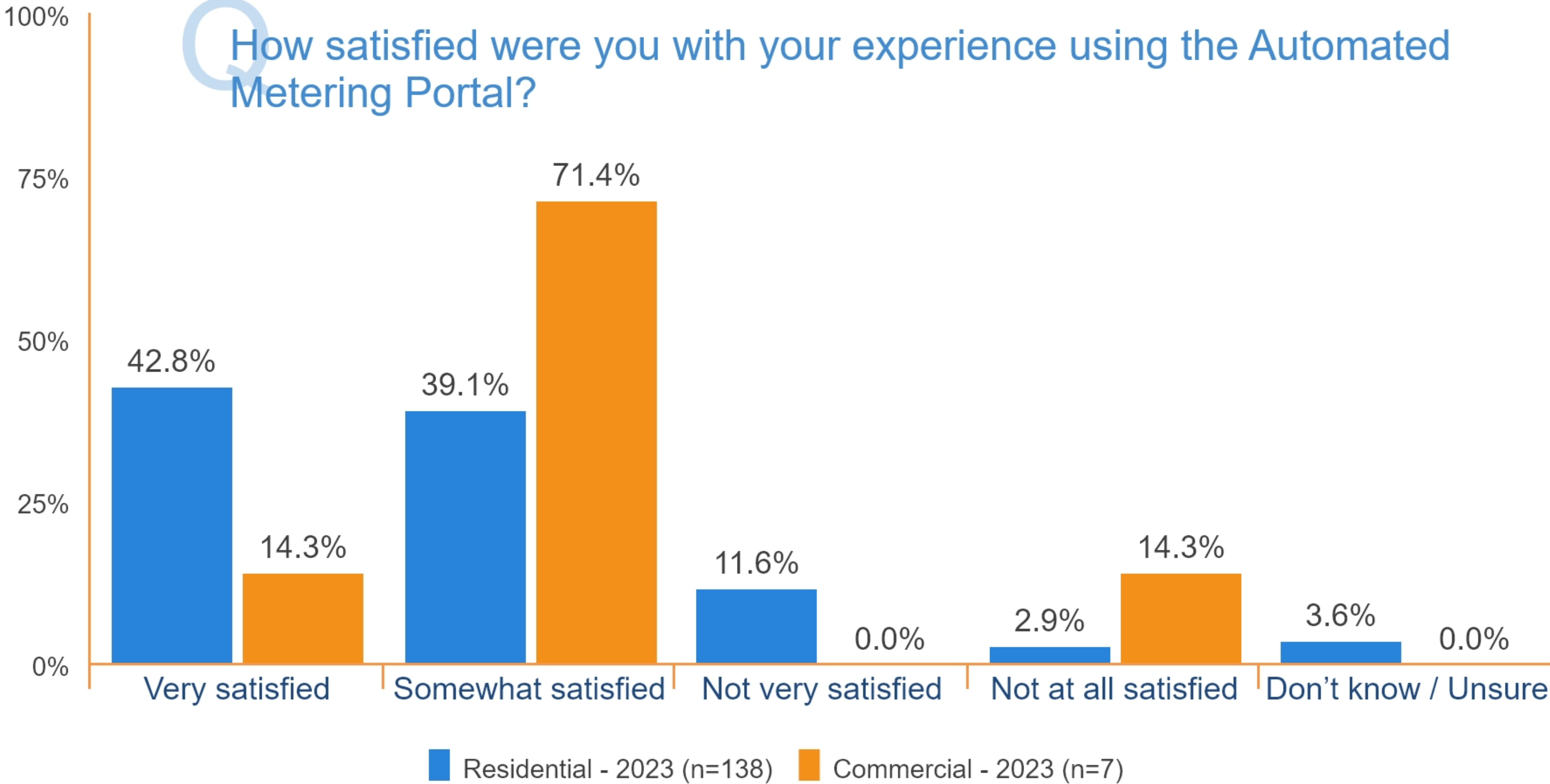
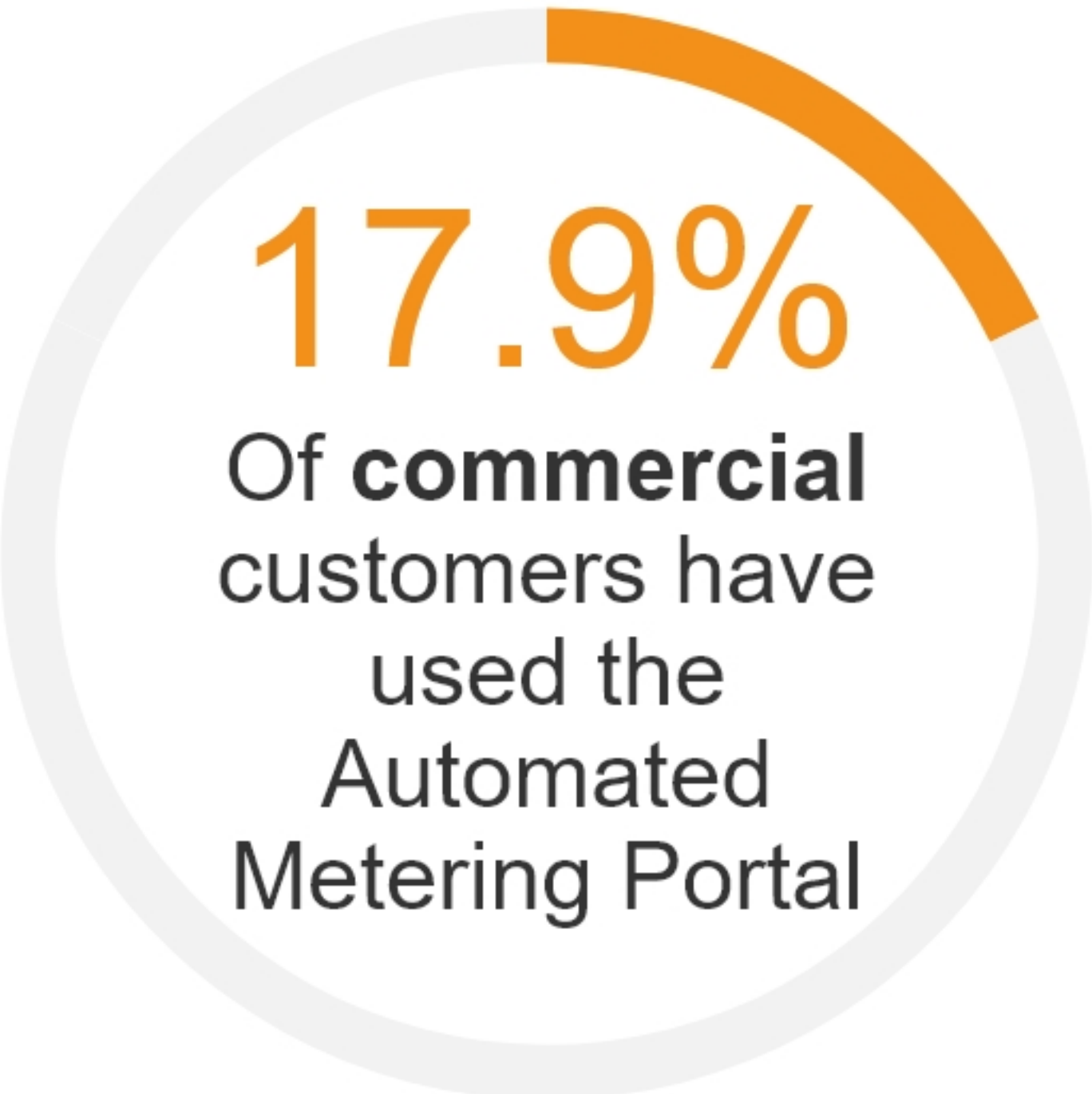
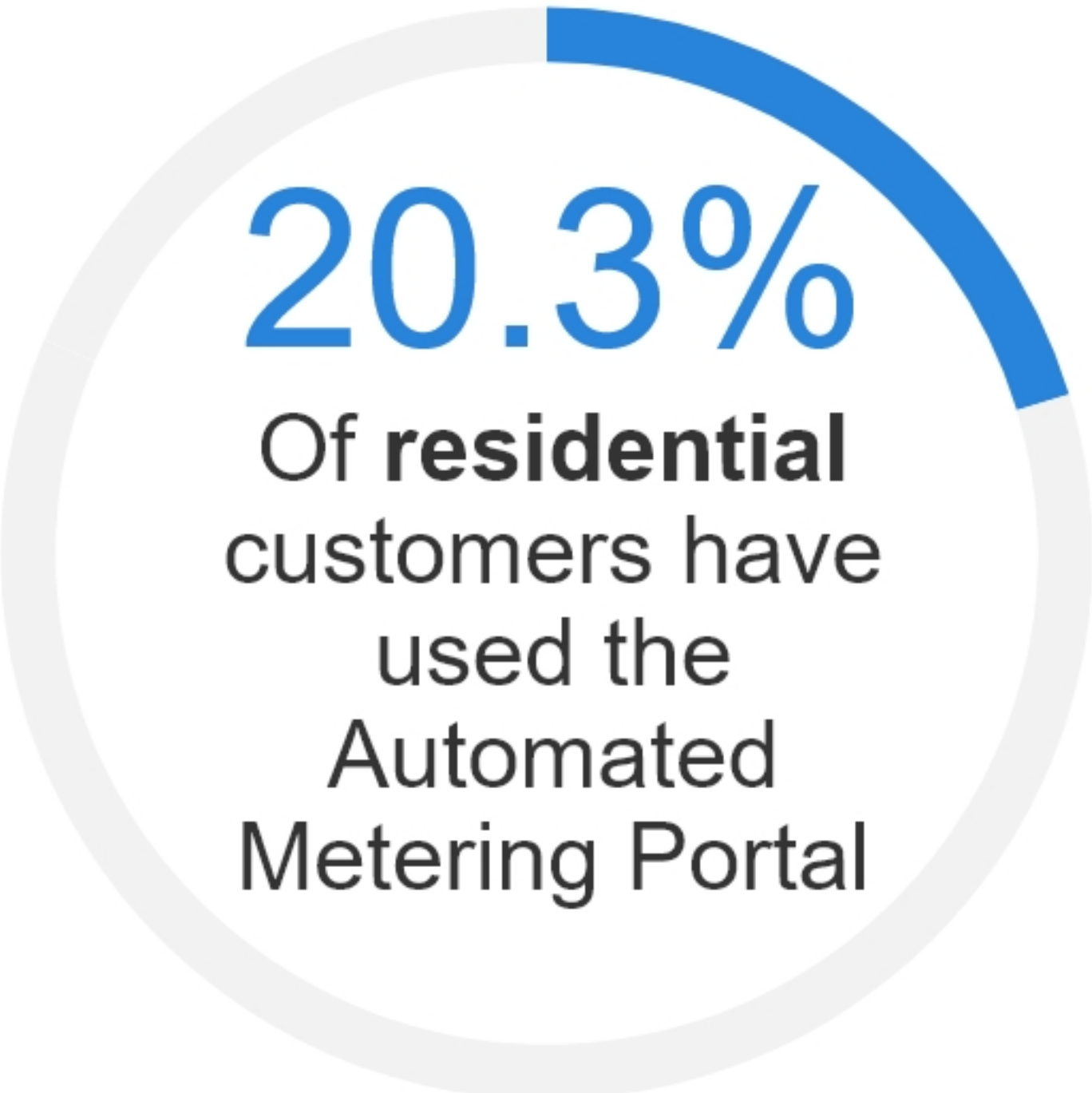


Nearly two-thirds of residents (65.2%) and nearly three-fifths of businesses (56.4%) reported using the Bill and Payment Portal. Among those respondents who have used the Bill and Payment Portal, over three-quarters of residents (78.4%) and over four-fifths of businesses (81.9%) reported being "very satisfied" or "somewhat satisfied" with their experience using the portal.



Less Use of Automated Metering Portal

One-fifth of residents (20.3%) and over one-out-of-six businesses (17.9%) reported using the Automated Metering Portal. Of those respondents that have used the Automated Metering Portal, over four-fifths of residents (81.9%) and businesses (85.7%) reported being "very satisfied" or "somewhat satisfied" with their experience using the portal.



Dissatisfied with Portal Because of Difficulty Using

Among residential respondents who reported being dissatisfied with either the Billing and Payment Portal or the Automated Metering Portal, nearly one-fifth indicated this is because the portal is "difficult to use / not user friendly" (18.0%) or "difficult to make payment or set up autopay" (18.0%). Other residents reported being dissatisfied with either portal because it is "antiquated / clunky / non functional" (12.4%), they had "log in issues" (9.0%) or "billing issues" (9.0%).

The commercial respondents who reported dissatisfaction with either DPU portal indicated the portal was "difficult to use / not user friendly" (50.0%).

For what reasons are you dissatisfied with either DPU Portal?
(Top 13 values shown)

	2023	
	Residential	Commercial
Sample size	89	4
Difficult to use / not user friendly	18.0%	50.0%
Difficult to make payment or set up autopay	18.0%	0.0%
Antiquated / clunky / non functional	12.4%	0.0%
Other	10.1%	50.0%
Log in issues	9.0%	0.0%
Billing issues	9.0%	0.0%
Poor user interface / design	7.9%	0.0%
Auto pay issues	4.5%	0.0%
Multiple reasons	4.5%	0.0%
Doesn't save payment information	3.4%	0.0%
Portal was down / broken	2.2%	0.0%
Inconsistent	1.1%	0.0%

Businesses More Satisfied with DPU's Organizational Citizenship

Three-fifths of residential respondents (60.9%) and over three-quarters of commercial respondents (76.9%) reported being either "very satisfied" or "somewhat satisfied" with DPU's organizational citizenship. Of note, three-out-of-ten residents (30.0%) and one-fifth of businesses (20.5%) reported being unsure of their satisfaction with DPU's organizational citizenship.

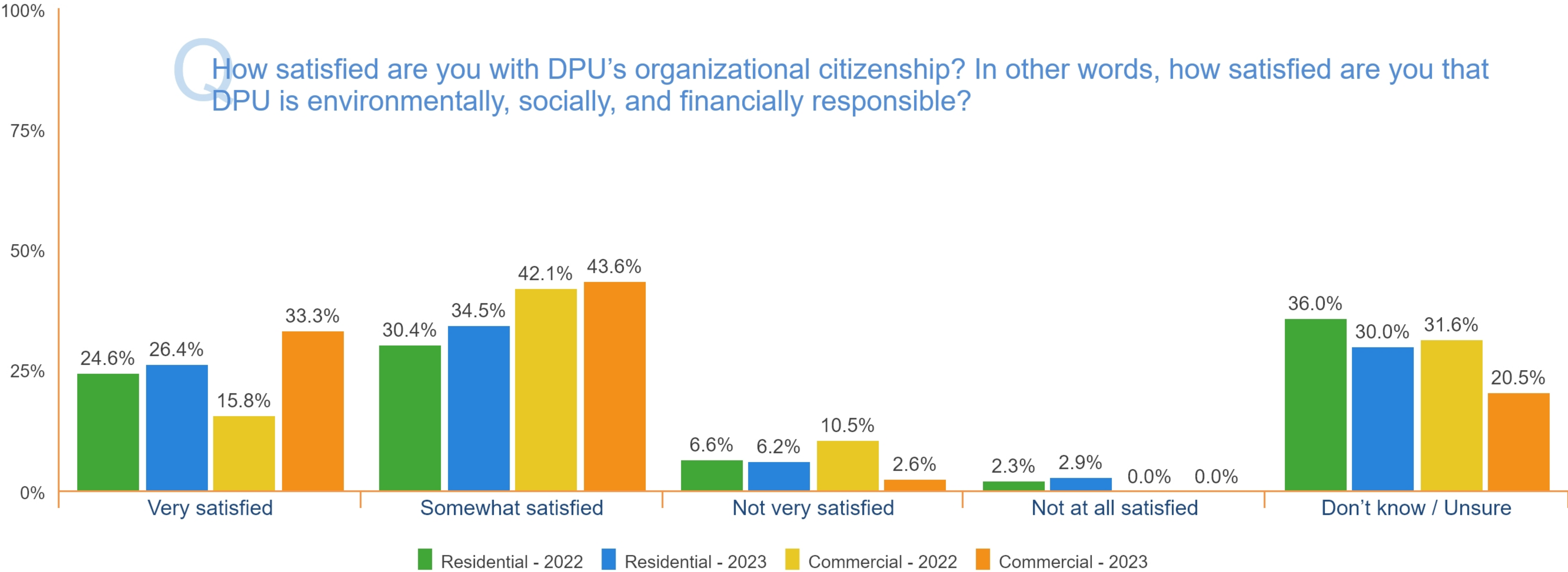


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0.0%

71.5%

would still purchase
at an increased
price point

23.3%

40.0%

0.0%

8.9%

5.4%

2.8%

0.0%

Negative Impact

No Impact

Positive Impact

Boomers

Considerations

- **Gain feedback from businesses about reliability issues.** Commercial customers provided decreased ratings for their satisfaction with the reliability of the DPU's natural gas service (-17.7 percentage points) and water service (-12.6 percentage points). Knowing that commercial customers are decreasingly satisfied with the reliability of the DPU's natural gas and water services, and that these services are critical to the operation of most businesses, it is recommended that the DPU investigate any specific issues businesses have experienced over the past year that have resulted in decreased satisfaction with the reliability of the DPU's services. To do so, the DPU may consider conducting in-depth interviews with any commercial customers who reported lower levels of satisfaction with the reliability of the DPU's natural gas or water service. During these interviews, the moderator may ask participants to describe any specific instances where they experienced issues with their water supply or natural gas availability, that resulted in reduced satisfaction with the reliability of the DPU's services. By obtaining this feedback, the DPU will have improved knowledge of specific reliability issues and will be better equipped to determine solutions or discuss specific issues with customers.
- **Educate about community ownership model.** A decreased frequency of residential (65.3% from 67.7% in 2022) and commercial (59.0% from 68.4% in 2022) correctly indicated that the DPU is a Community-Owned Municipal Utility. However, the majority of respondents (85.3% residential, 87.2% commercial) indicated it is important to maintain local control of their municipal utility. Knowing that the community ownership model is important to customers, but many customers are not aware that the DPU is a Community-Owned Municipal Utility, it is recommended that the DPU increase its communication to customers about its ownership structure. This may entail providing customers with educational materials that detail the benefits of being a customer of a Community-Owned Municipal Utility, such as lower rates, greater reliability of service and the ability for customers to be more involved in utility operations through attendance at board meetings. By providing additional education to customers about the benefits of being a customer of a Community-Owned Municipal Utility, the DPU may not only improve customers' awareness of its ownership structure, but also improve overall satisfaction with the utility, with greater customer awareness of the benefits they experience that they would not as a customer of an investor-owned utility.

Considerations

- **Encourage greater use of Automated Metering Portal.** Less than one-quarter of residential and commercial respondents reported they have used the DPU's Automated Metering Portal. Further, less than three-fifths of respondents provided positive ratings for the DPU "helping customers conserve electricity, gas and water." Knowing that there is a segment of customers who do not feel the DPU helps them to conserve electricity, gas and water, and that the majority of customers are not using the Automated Metering Portal for the purpose of viewing and managing their electric, gas and water usage, it is recommended that the DPU increase its communication about the availability of the Automated Metering Portal. This communication should detail the ways customers can use the portal in order to view and manage their electric, gas and water usage. This communication should also describe to customers the ways in which a customer can use this portal to determine areas where they should work to conserve their usage in order to reduce their electric, water and gas bills. It may also be beneficial for the DPU to add a section to their Automated Metering Portal that details tips for conserving usage, so that customers have the necessary tools for reducing their usage where there is a need to do so. This communication may help to not only increase use of the portal, but also improve the perception that the DPU helps customers conserve electricity, gas and water.

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