



Voice of Customer Study 2024



Report of Findings

29 February 2024
Confidential & Proprietary

Table of Contents

SECTION ONE

About GreatBlue

SECTION TWO

Project Overview

SECTION THREE

Key Study Findings

SECTION FOUR

Considerations

SECTION FIVE


Aggregate Data (Provided Separately)







Harnessing the Power of Data

...to help clients achieve organizational goals.

 **Data** supporting strategic decisions to improve products and services. Since 1979, our experience with study and instrument design, data collection, analysis, and formal presentation assists our clients in identifying the “why” and “what’s next.”

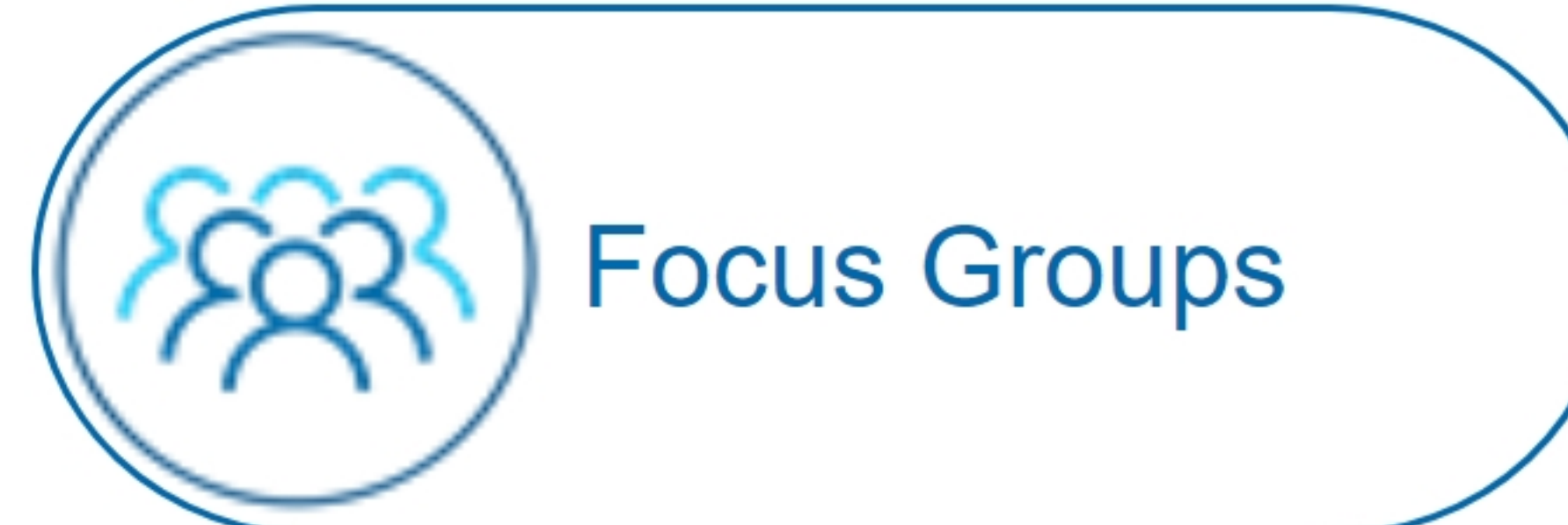
 **Talent** with a knowledge base in a wide range of industries and methodologies ensures a 360° view of the challenges faced and the expertise to address them.

 **Solutions** that are customized to provide a personalized approach to understanding organizational, employee, and customer needs, allowing for more informed decisions.

Methodologies:



Digital Surveys



Focus Groups



In-Depth Interviews

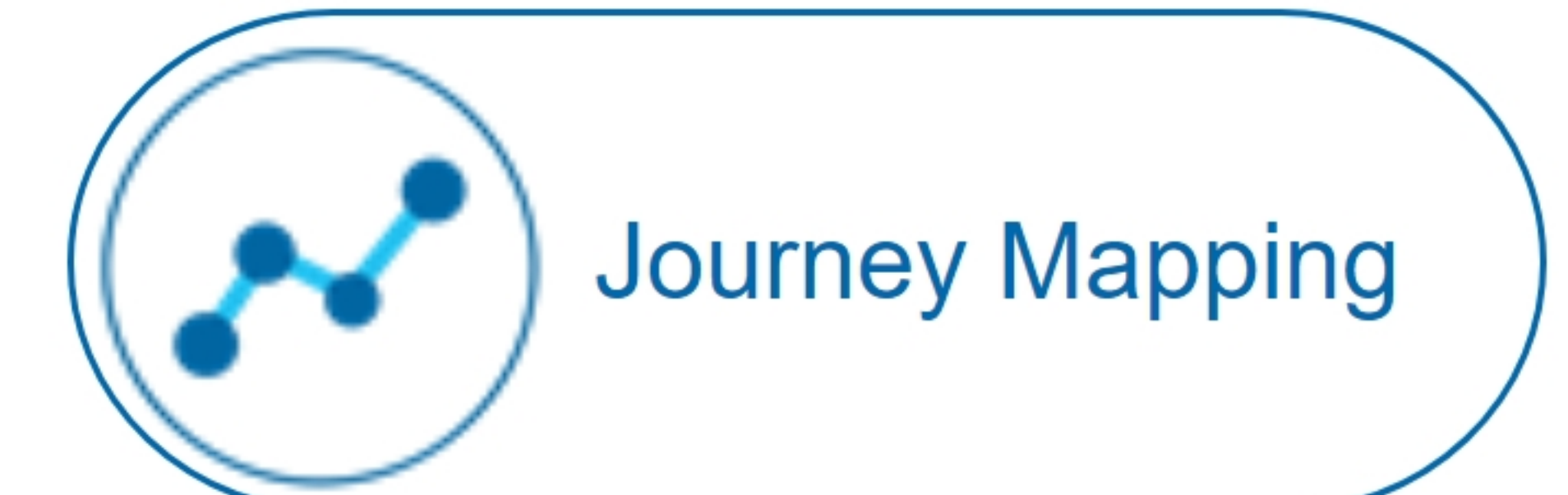
Studies:



Awareness and Perception Studies



Customer and Employee Satisfaction Studies



Journey Mapping



Creative and New Concept Testing

Table of Contents

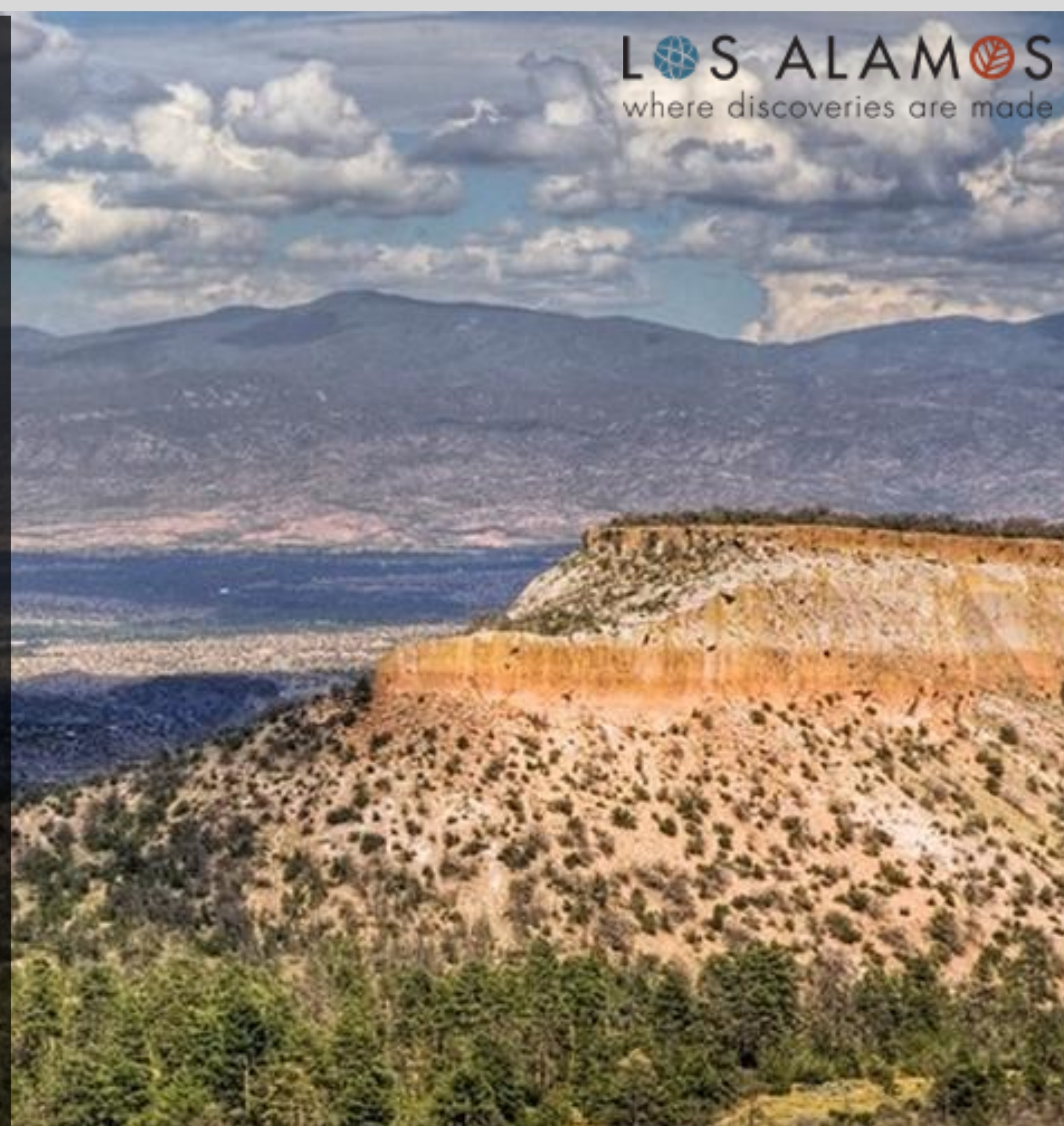
SECTION ONE
About GreatBlue

SECTION TWO
Project Overview

SECTION THREE
Key Study Findings

SECTION FOUR
Considerations

SECTION FIVE
Aggregate Data (Provided Separately)



Project Overview

Research Objectives

- 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' perceptions of the DPU's communication platforms.
- 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

In order to service these objectives, GreatBlue developed a bespoke research study leveraging a digital survey to learn about the following topics:

- Ratings of the DPU's organizational characteristics
- Satisfaction with the quality of services received
- Satisfaction with the reliability of services received
- Satisfaction with customer service and field service personnel
- Satisfaction with the rates paid for the quality of service received
- Current and preferred methods of receiving information about the DPU
- Satisfaction with the quality of communication received from the 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

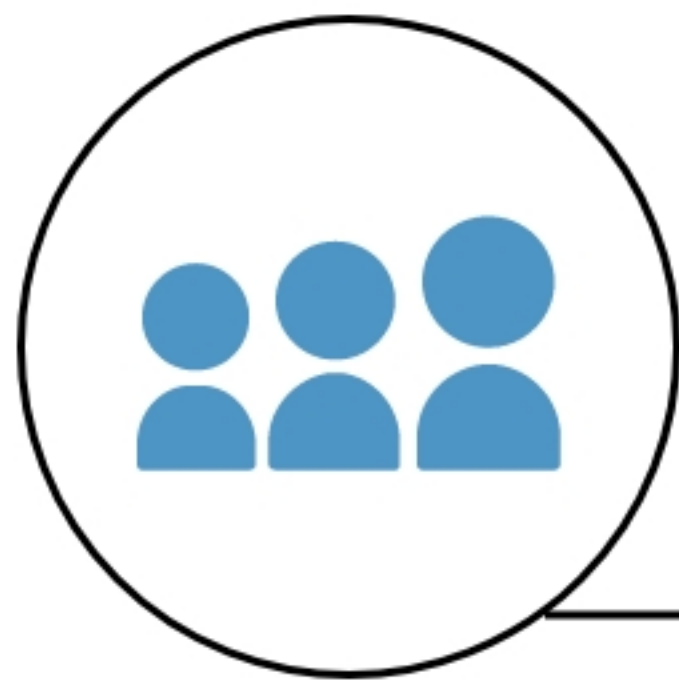


Residential

Methodology Digital	No. of Completes 575	No. of Questions 49*	Incentive None	Sample Customer List
Target Residential Customers	Quality Assurance Dual-level**	Margin of Error +/- 3.8%	Confidence Level 95%	Research Dates January 9 - 31, 2024

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

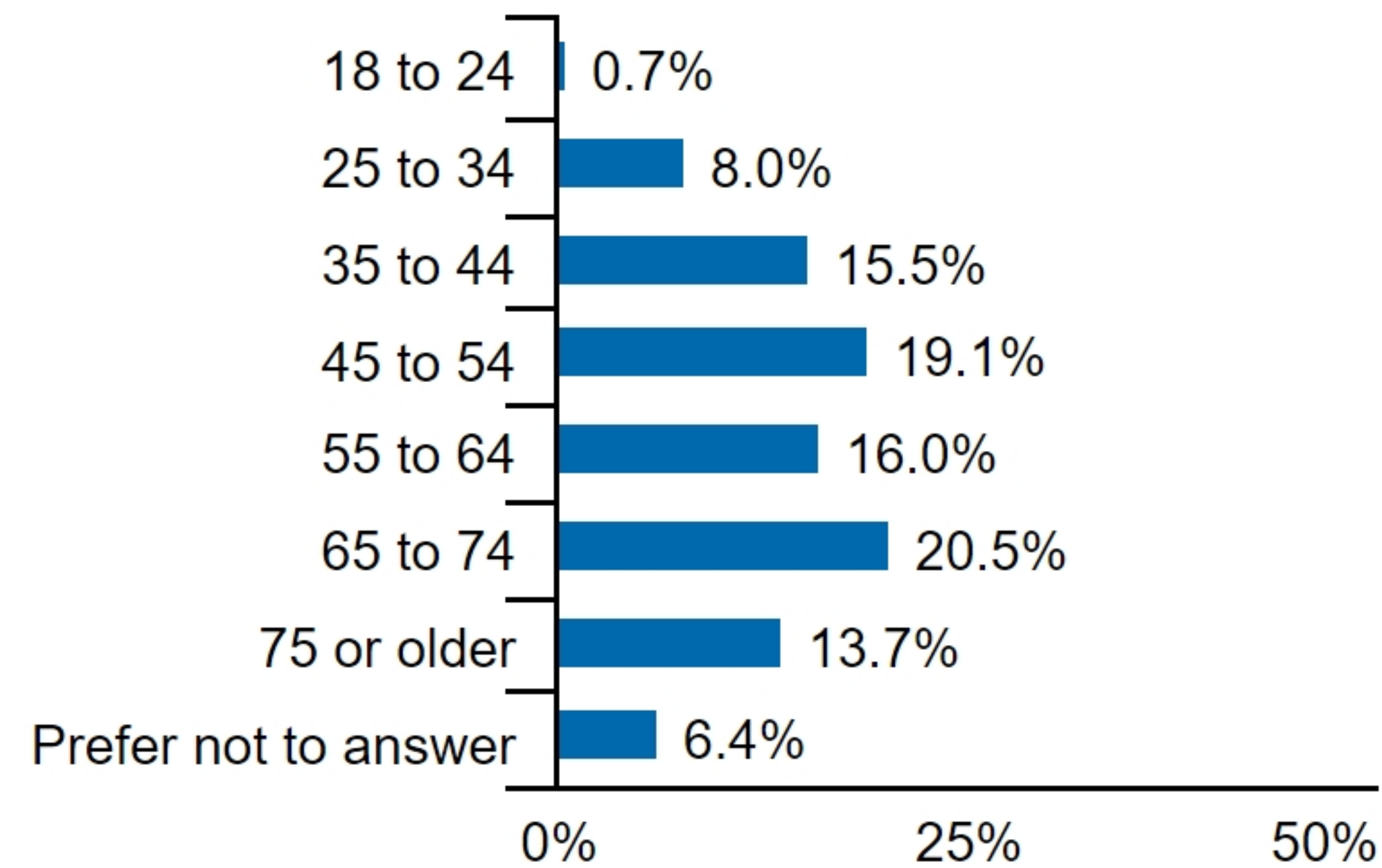
** Data Quality personnel ensure the integrity of the data is accurate.



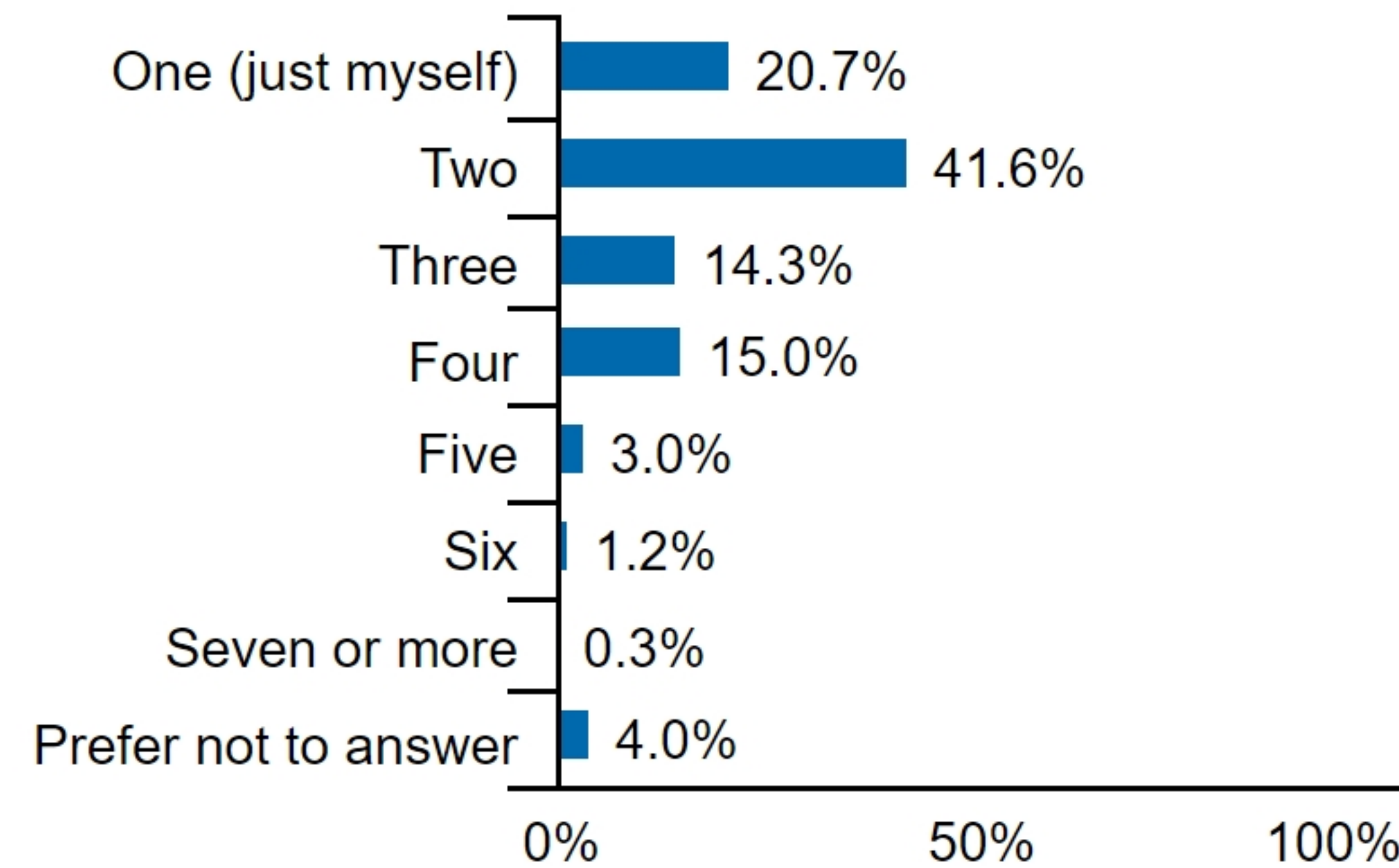
Respondent Snapshot



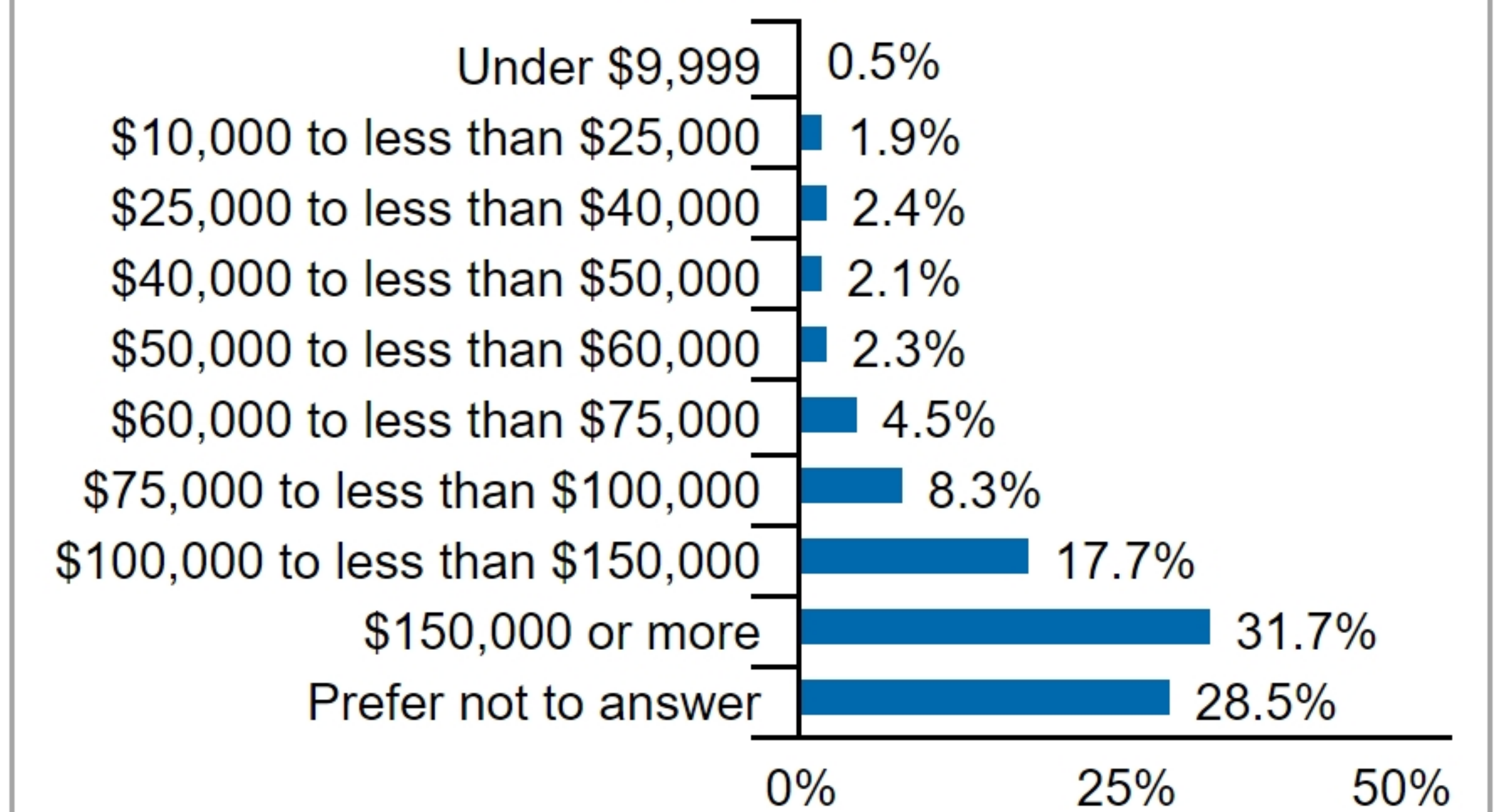
Age



Household Size



Income

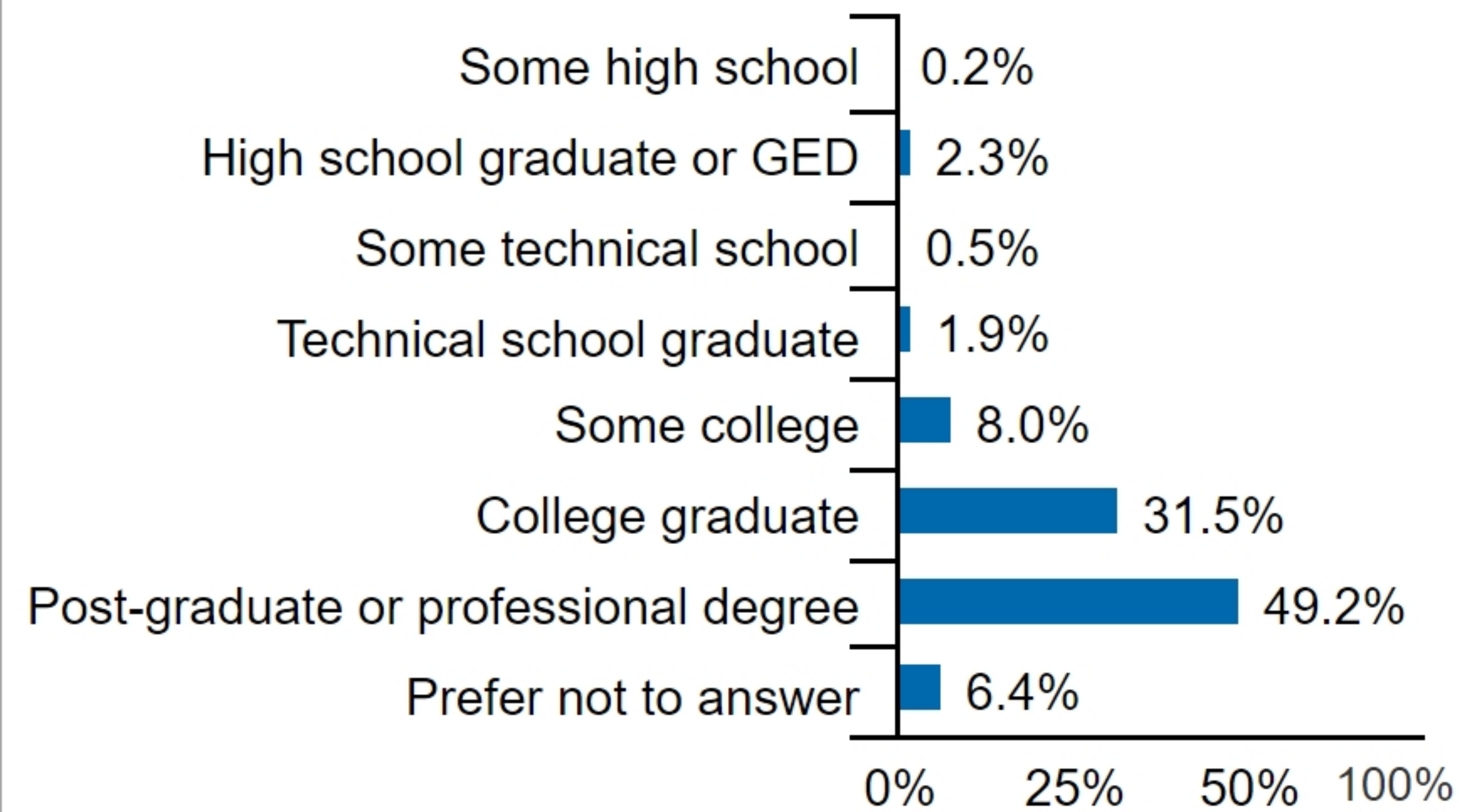


Rent vs. Own

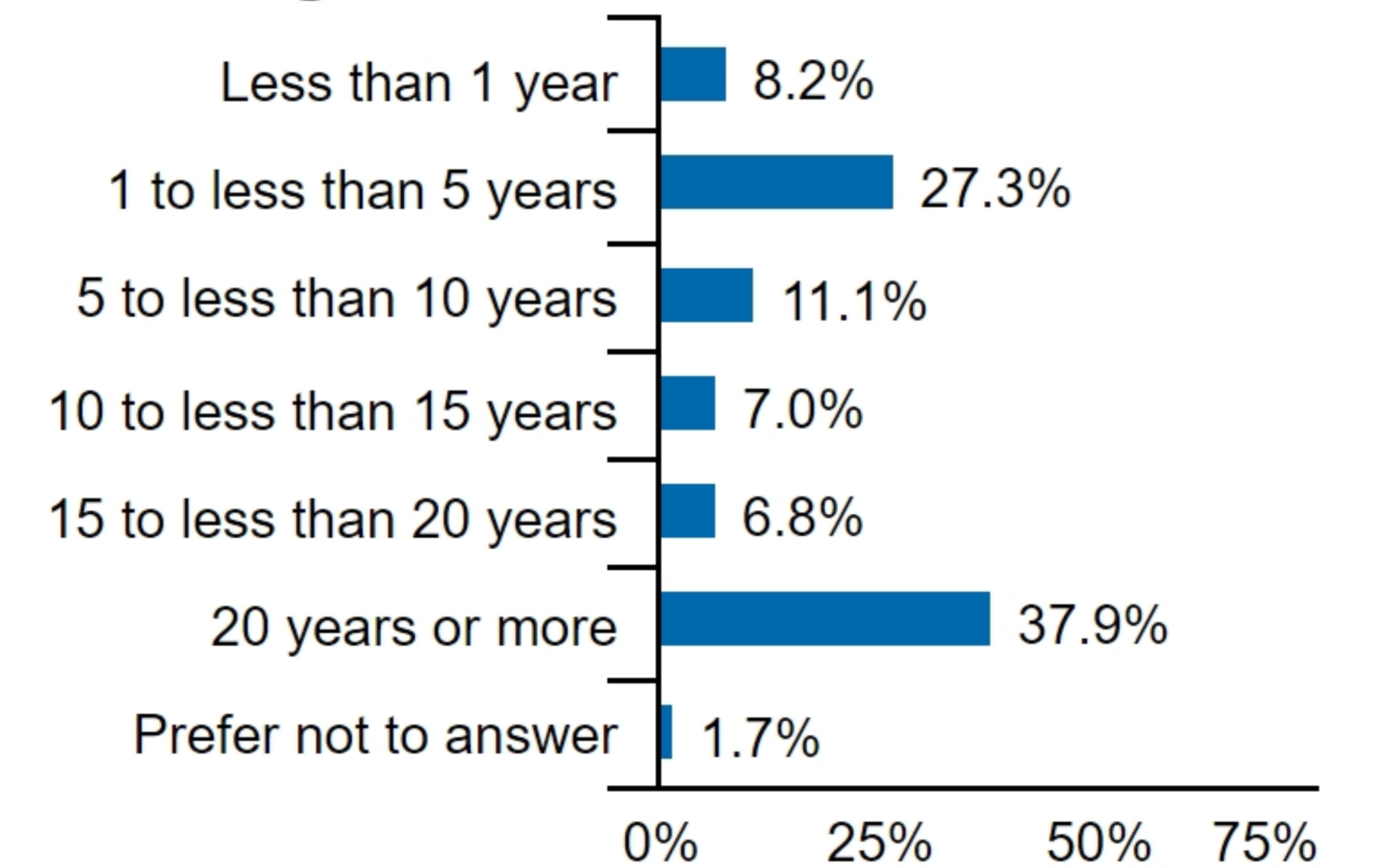
84.7% / 12.7%
Own Rent

2.6% of respondents provided responses of "don't know / unsure"

Education



Length of Time as Customer





Research Methodology Snapshot



Commercial

Methodology Digital & Telephone	No. of Completes 40	No. of Questions 43*	Incentive None	Sample Customer List
Target Commercial Customers	Quality Assurance Dual-level**	Margin of Error +/- 13.3%	Confidence Level 95%	Research Dates January 9 - February 8, 2024

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

** Data Quality personnel ensure the integrity of the data is accurate.

Table of Contents

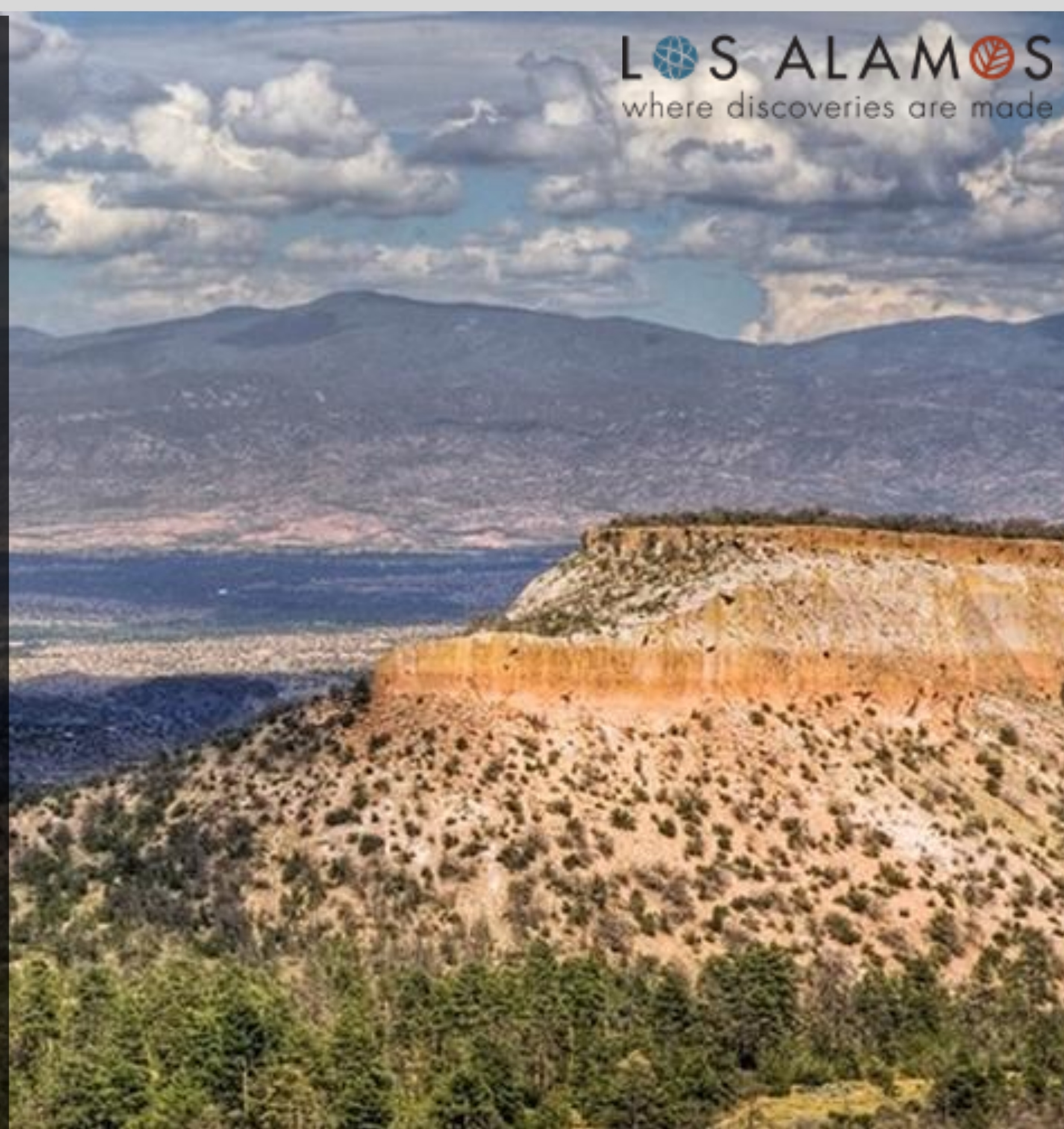
SECTION ONE
About GreatBlue

SECTION TWO
Project Overview

SECTION THREE
Key Study Findings

SECTION FOUR
Considerations

SECTION FIVE
Aggregate Data (Provided Separately)



Guide to Footnotes

General

n=362

The lowercase "n" is used to indicate the base size, or the amount of respondents who answered a particular question.

NP+S

The NP+S (net positive score) is a score based on a question asking respondents to describe their relationship with their utility. The score is an aggregation of the following responses: "an advocate of my utility" and "a satisfied customer."

Statistical Significance



Arrows indicate statistical significance at a 95% confidence level, with the color and direction of the arrow denoting whether it is higher or lower than the compared subgroup. They are used in charts.

36.2%/
36.2%

Font color indicates statistical significance at a 95% confidence level compared to the previous year. This is used in tables.

Scale Questions

"Aggregate of ratings 7-10 shown"

This phrase indicates positive ratings from questions that use a 10-point scale. The positive ratings are defined as a rating of 7 through 10.

Key Study Findings



Ratings

- Satisfaction with the quality of the DPU's electric service increased slightly among residential customers in 2024 (93.2% over 86.6% in 2023), and increased significantly among commercial customers (94.9% over 81.6% in 2023).
- Similarly, satisfaction with the reliability of the DPU's electric service (93.3% over 83.5% in 2023) among residential customers increased significantly in 2024.
- The DPU received an NP+S (Net Positive Score) of 77.8% among residential customers and 90.0% among commercial customers.
- Over four-fifths of residential customers (81.5%) and nearly three-quarters of commercial customers (73.1%) who have recently contacted the DPU reported being satisfied with their customer service experience.



Communications and Website

- There was a significantly increased preference among commercial customers for receiving information through "email" (+26.9 percentage points) while a consistent frequency of residential customers (37.7%) prefer "email" as well.
- Over three-quarters of customers (79.5% residential, 82.5% commercial) reported the frequency of communication they receive from the DPU is "about right."
- Similarly, three-quarters of customers (75.5% residential, 75.0% commercial) indicated they are satisfied with the DPU website's content.
- Roughly two-fifths of residential customers (39.8%) were aware of the DPU's new website, compared to nearly one-third of commercial customers (32.5%).



Portals

- Nearly three-fifths of residential customers (57.7%) have used the bill and payment portal, while over two-fifths of commercial customers (45.0%) have used it.
- A majority of customers (81.6% residential, 88.9% commercial) who use the bill and payment portal reported being satisfied with it.
- Nearly one-quarter of residential customers (24.2%) have used the automated metering portal, compared to 10.0% of commercial customers.
- Similarly, a majority of customers (85.6% residential, 100% commercial) who used the automated metering portal are satisfied.

Satisfaction with Services

Satisfaction | Organizational Characteristics

When rating the DPU on a series of organizational characteristics, commercial customers provided increased ratings for the DPU "being transparent about company operations and policies" (+24.3 percentage points) which led to a significantly higher average positive rating for organizational characteristics in 2024 compared to 2023. Further, residential customers provided significantly higher ratings for the DPU "helping customers conserve electricity, gas, and water" (+8.4 percentage points), its "community outreach" (+6.2 percentage points) and for the DPU "communicating with customers" (+5.1 percentage points), which led to a significantly higher average positive rating for organizational characteristics in 2024 compared to 2023.

	Commercial		Residential		Public Power Data Source*
	2023	2024	2023	2024	2023
Communicating with customers	64.1%	75.0%	75.3%	80.4%	65.3%
Helpful and knowledgeable staff	81.6%	72.2%	79.3%	80.3%	65.5%
Responding promptly to customer questions and complaints	66.7%	73.5%	79.8%	79.7%	65.7%
Overall satisfaction with DPU	71.8%	76.9%	75.5%	75.7%	68.0%
Community outreach	61.1%	68.8%	64.8%	71.0%	59.3%
Providing good service and value for the cost of the service	60.5%	69.4%	66.9%	66.5%	60.9%
Being transparent about company operations and policies	50.0%	74.3%	60.9%	66.2%	59.7%
Helping customers conserve electricity, gas, and water	54.5%	63.6%	56.4%	64.8%	54.0%
Average	63.8%	71.7%	69.8%	73.1%	62.3%

Aggregate of ratings 7-10 shown without "don't know / unsure" responses
 The Public Power Data Source is a residential customer satisfaction benchmarking tool

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

Satisfaction | Reasons for Dissatisfaction

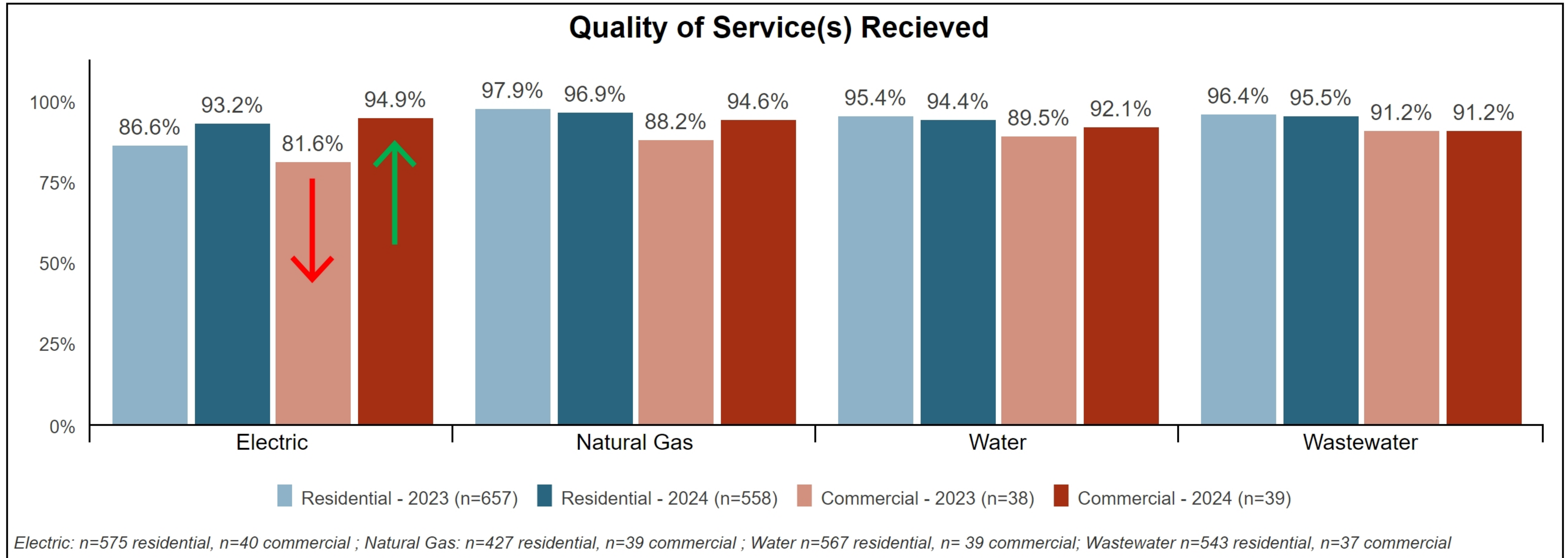
The top reasons for providing poor ratings for the DPU for any company characteristic among both residential and commercial customers were due to "cost / too expensive," "poor communication / lack of information / not responsive," "poor customer service / support" or "billing issues."

Reasons for Poor Rating	2024	
	Residential	Commercial
<i>Sample size</i>	127	8
Cost / too expensive	29.9%	12.5%
Expressed multiple reasons	16.5%	0.0%
Poor communication / lack of information / not responsive	9.4%	12.5%
Poor customer service / support	8.7%	12.5%
Billing issues	7.9%	12.5%
Need to provide conservation tips	3.9%	0.0%
Difficult to submit payment	3.1%	0.0%
Frequent outages / unreliable service	2.4%	0.0%
Overall improvement needed	2.4%	12.5%
Technology needs improvement (website, phone app, etc.)	1.6%	12.5%

Top 10 responses shown

Satisfaction | Quality of Services Received

A significantly higher frequency of commercial customers reported being satisfied with the quality of the electric service they receive from the DPU, and a slightly increased frequency of commercial customers reported being satisfied with the quality of natural gas and water service they receive from the DPU as well. A slightly increased frequency of residential customers reported being satisfied with the quality of electric service received from the DPU, while satisfaction with the DPU's natural gas, water and wastewater service remained consistent among residential customers.

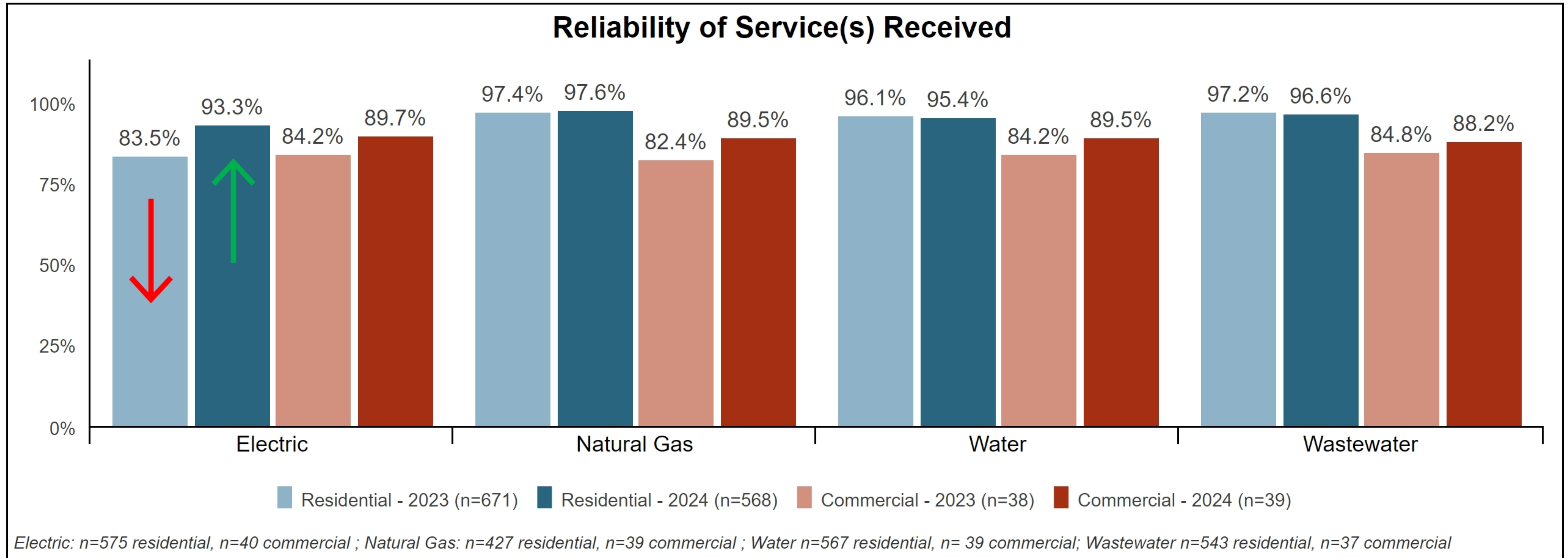


Aggregate of responses "very satisfied" and "somewhat satisfied" w/o "don't know / unsure" responses

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

Satisfaction | Reliability of Services Received

A significantly higher frequency of residential customers reported being satisfied with the reliability of the electric service they received from the DPU, while a consistent frequency reported satisfaction with the reliability of the natural gas, water and wastewater service they receive. Further, commercial customers reported slight increases in satisfaction with the reliability of the DPU's electric, natural gas, water and wastewater services.

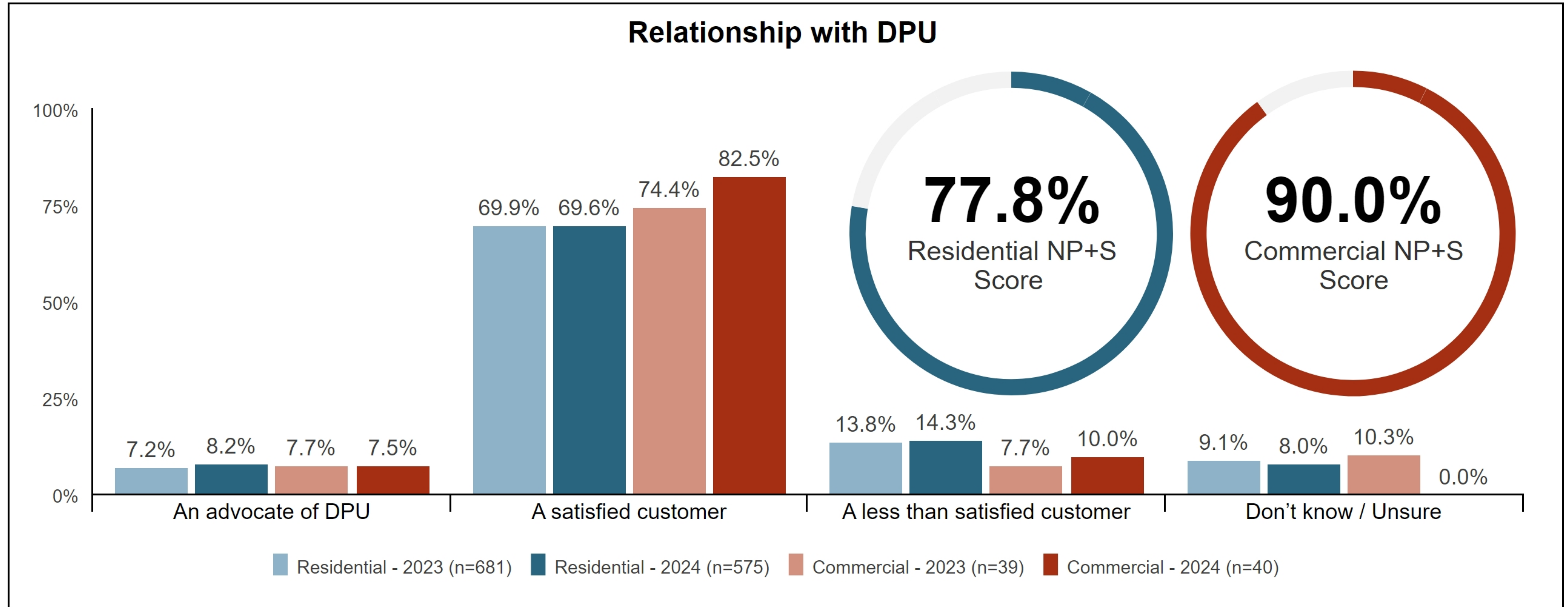


Aggregate of responses "very satisfied" and "somewhat satisfied" w/o "don't know / unsure" responses

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

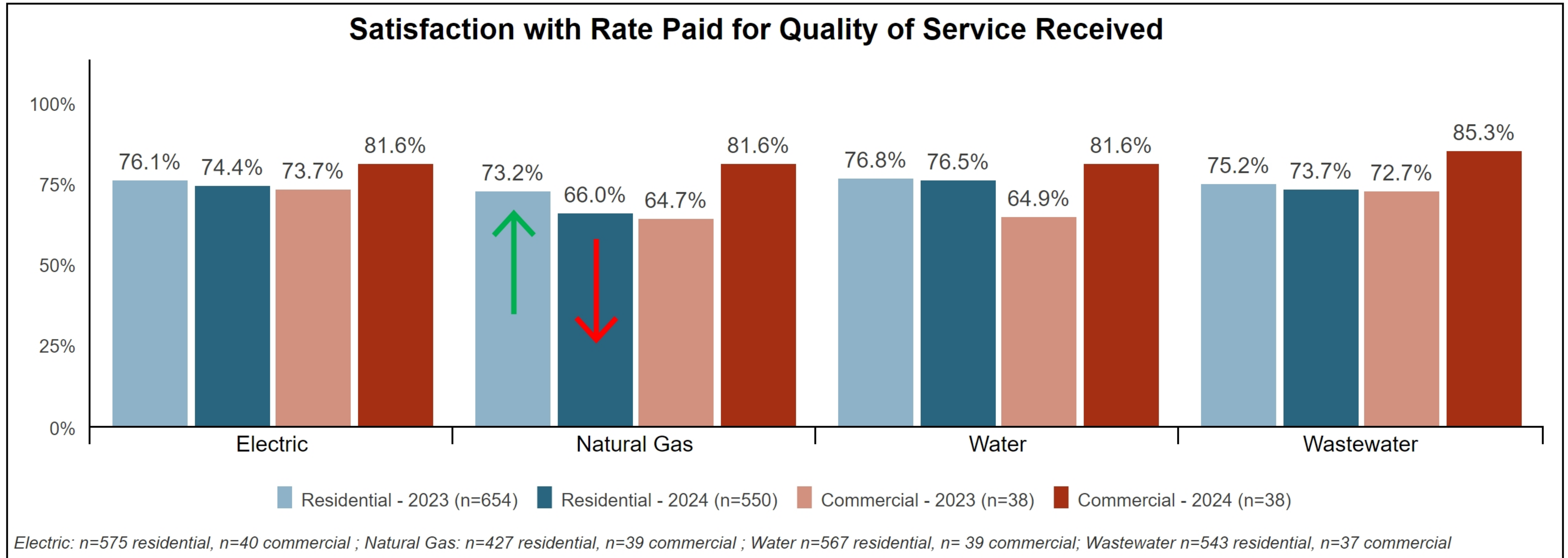
Satisfaction | NP+S Score

The DPU scored a consistent net positive rating (satisfied + advocate) among residential customers (77.8% over 77.1% in 2023), while commercial customers provided an increased net positive rating (90.0% over 82.1% in 2023), which was largely due to fewer commercial customers being unsure of how to rate their relationship with the DPU in 2024 compared to 2023.



Satisfaction | Quality Received for Price Paid

A significantly lower frequency of residential customers reported being satisfied with the quality of the natural gas service they receive from the DPU for the price paid for that service, while satisfaction with the DPU's electric, water and wastewater service quality for the price paid remained consistent. A slightly increased frequency of commercial customers reported being satisfied with the quality of all services received from the DPU for the price paid for the service.

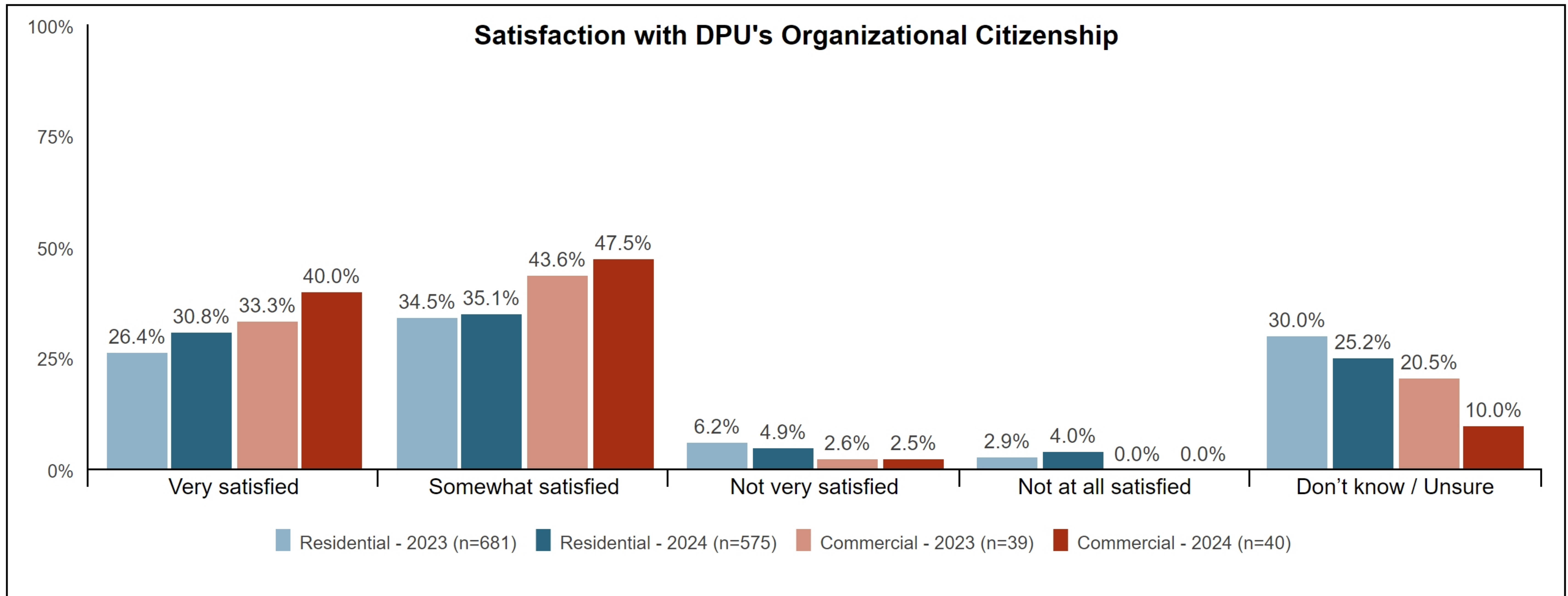


Aggregate of responses "very satisfied" and "somewhat satisfied" w/o "don't know / unsure" responses

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

Satisfaction | Organizational Citizenship

Nearly two-thirds of residential customers (65.9%) and nearly nine-out-of-ten commercial customers (87.5%) reported being either "very satisfied" or "somewhat satisfied" with the DPU's organizational citizenship. Of note, one-quarter of residential customers reported being unsure of their satisfaction with the DPU's organizational citizenship, and one-out-of-ten commercial customers reported the same.



Satisfaction | A Closer Look



Age

More customers 55 years of age or older are satisfied with all of the DPU's services compared to younger age segments. Furthermore, significantly more customers 35 years of age or older reported being satisfied customers compared to younger segments.

- **Natural Gas Service:** Significantly more customers 55 years of age or older (71.4%) reported being satisfied with the **rate** they pay for the quality they receive compared to those 35-54 (60.2%) and those younger than 35 years of age (61.9%).
- **Electric Service:** Significantly more customers 55 years of age or older (95.1%) reported being satisfied with the **reliability** of their electric service compared to those under 35 years of age (87.5%).
- **Organizational Citizenship:** Significantly more customers 55 years of age or older (74.7%) are satisfied with the DPU's organizational citizenship compared to those 35 to 54 years of age (60.3%) and those younger than 35 years of age (54.0%).
- **Overall Satisfaction:** Slightly more customers 55 years of age or older (81.4%) provided positive ratings for their overall satisfaction with the DPU than those 35 to 54 years of age (74.5%) or under 35 years of age (71.4%).

*n=50 (under 35), n=199 (35-54), n=289 (55+) - sample sizes do not add up to n=575 due to respondents who said "prefer not to say" when asked their age.
Statistical significance is calculated with a 95% confidence level*



Homeowners vs. Renters

More homeowners reported being satisfied with the DPU's services compared to renters.

- **Net Positive Score (NP+S):** The NP+S among homeowners (79.8%) was significantly higher than the NP+S among renters (69.9%).
- **Electric Service:** More homeowners (75.8%) are satisfied with the **price** paid for the quality received compared to renters (72.2%).
- **Natural Gas:** More renters (72.9%) indicated they are satisfied with the **price** paid compared to the quality received compared to homeowners (65.8%).

n=73 (Renters), n=487 (Owners) - sample sizes do not add up to n=575 due to respondents who said "prefer not to say" when asked whether they rent or own their residence.

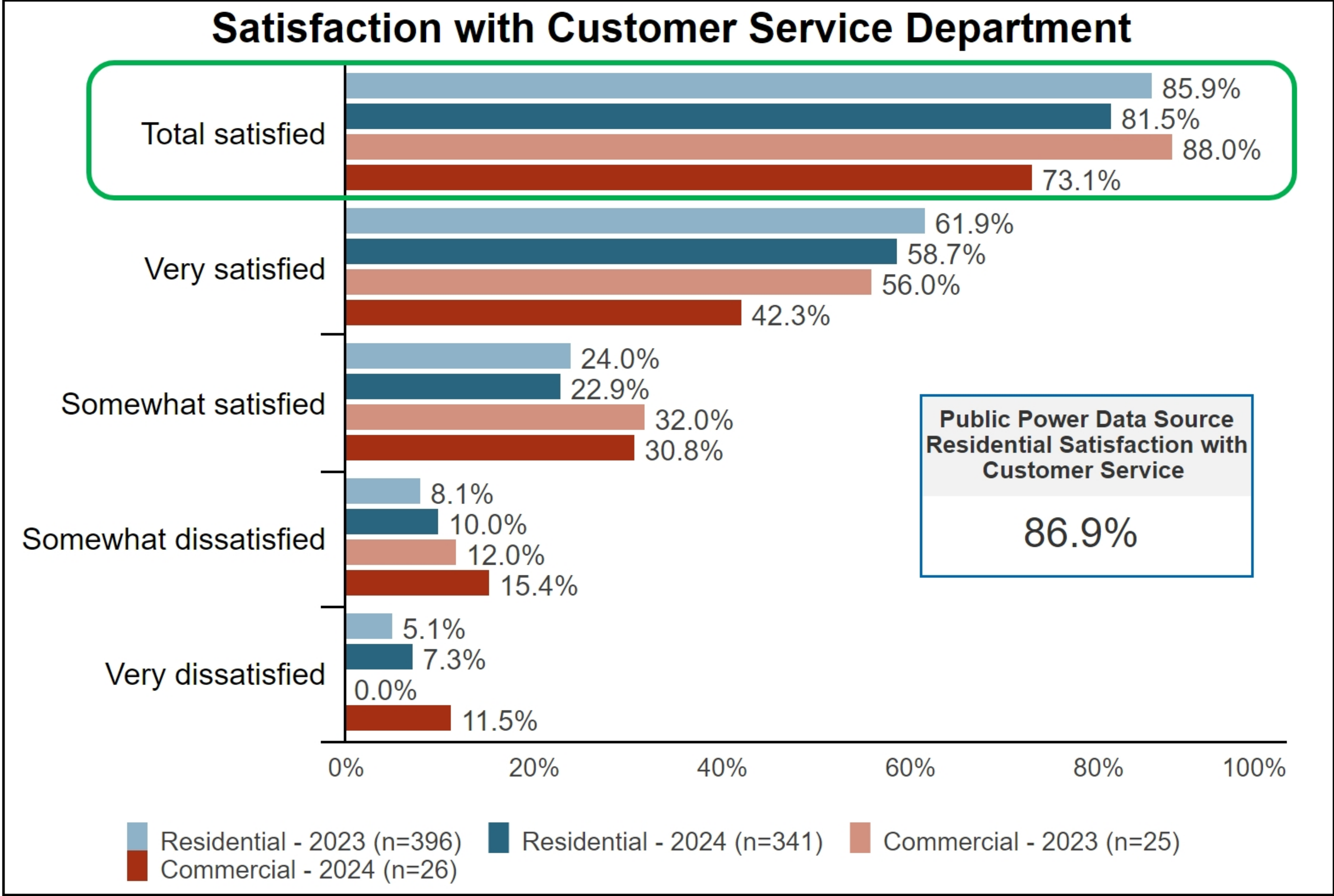
Statistical significance is calculated with a 95% confidence level

Customer Service



Customer Service | Satisfaction and Purpose of Contact

Among the residential customers who contacted the DPU in the last 12 months, this was primarily for a "billing question," a "payment or pay arrangement" or to "move in / out," while over one-third of commercial customers reported contacting the DPU for a "billing question." Although satisfaction ratings decreased in 2024, over four-fifths of residential customers and nearly three-quarters of commercial customers reported being satisfied with the service provided by the customer service department.

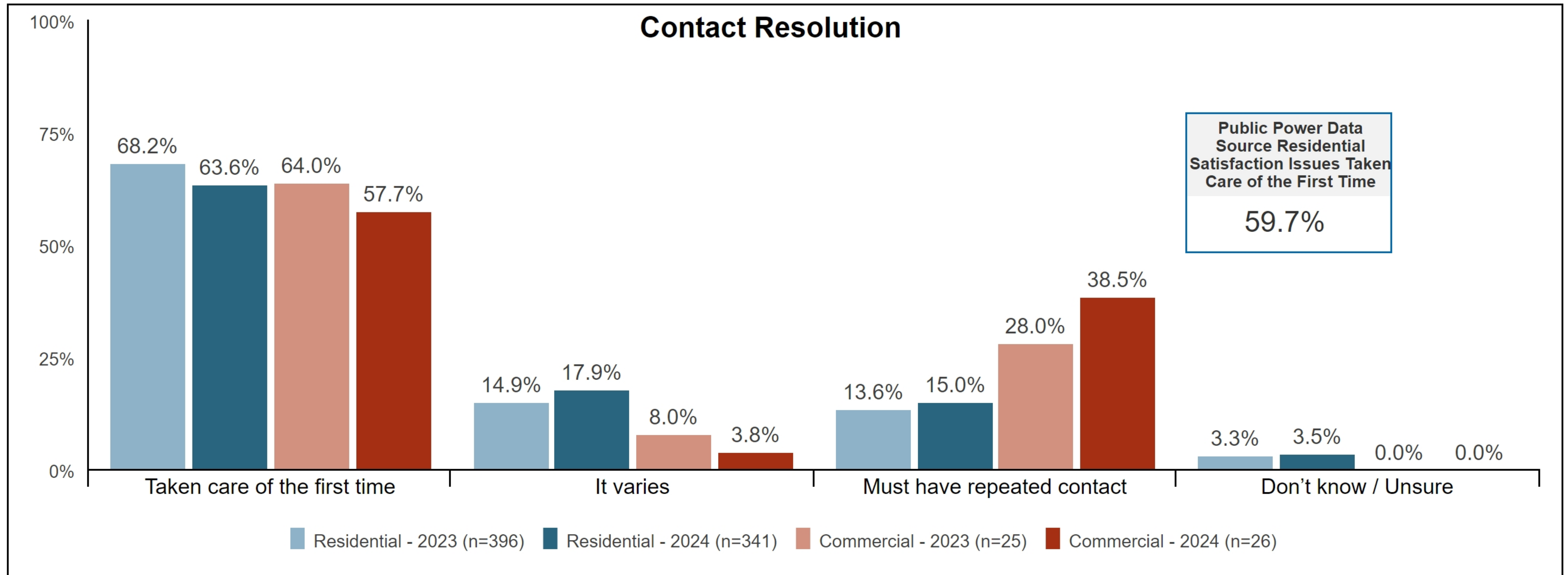


Purpose of Contact	2024	
	Residential	Commercial
Sample size	341	26
Billing question	27.3%	34.6%
Payment or pay arrangement	13.8%	7.7%
Move in / out	11.1%	7.7%
Trash or recycling concern	10.6%	0.0%
Electric service problem, question, issue, or concern	7.9%	3.8%
Update account details	7.3%	11.5%
Water service problem, question, issue, or concern	7.3%	15.4%
Natural gas service problem, question, issue, or concern	2.9%	0.0%

Top 8 responses shown

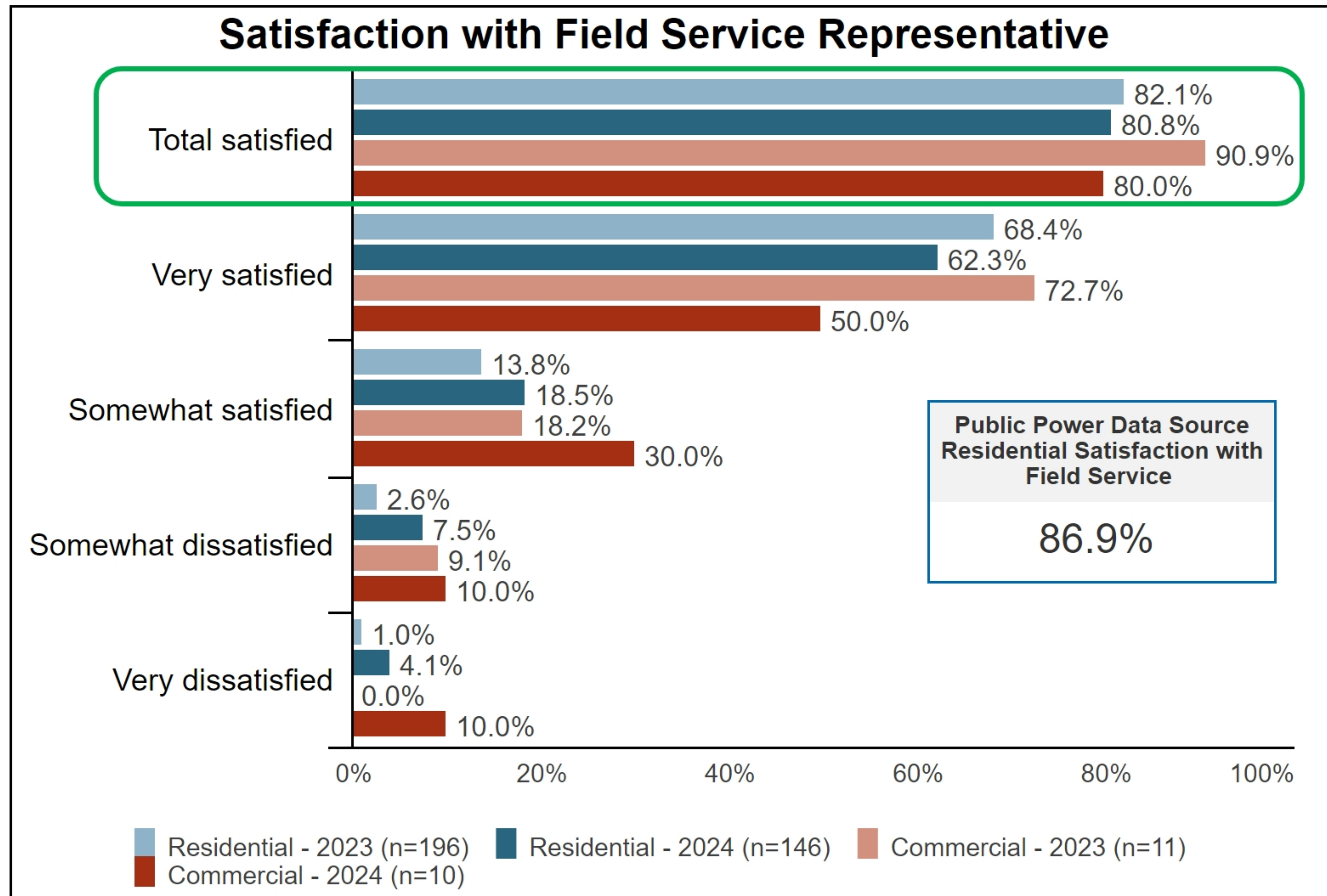
Customer Service | Issue Resolution

A slightly decreased frequency of residential customers and commercial customers indicated their questions or issues were "taken care of the first time" when they contacted the DPU in 2024. Of note, a higher rate of commercial customers reported a need for repeated contact when they contacted the DPU. Despite the decrease in first contact resolution, the rate of the DPU's residential customers who reported their issues are "taken care of the first time" is higher than the national Public Power Data Source average.



Customer Service | Satisfaction with Field Service

Among those customers who indicated a field representative visited their home or business in the last 12 months, the most common reasons for having a field service visit among residential and commercial customers were for a "meter reading" or a "service problem / repair." Although satisfaction decreased slightly in 2024 for both audiences, roughly four-fifths of both customer bases reported being satisfied with their experience with a DPU field service representative.

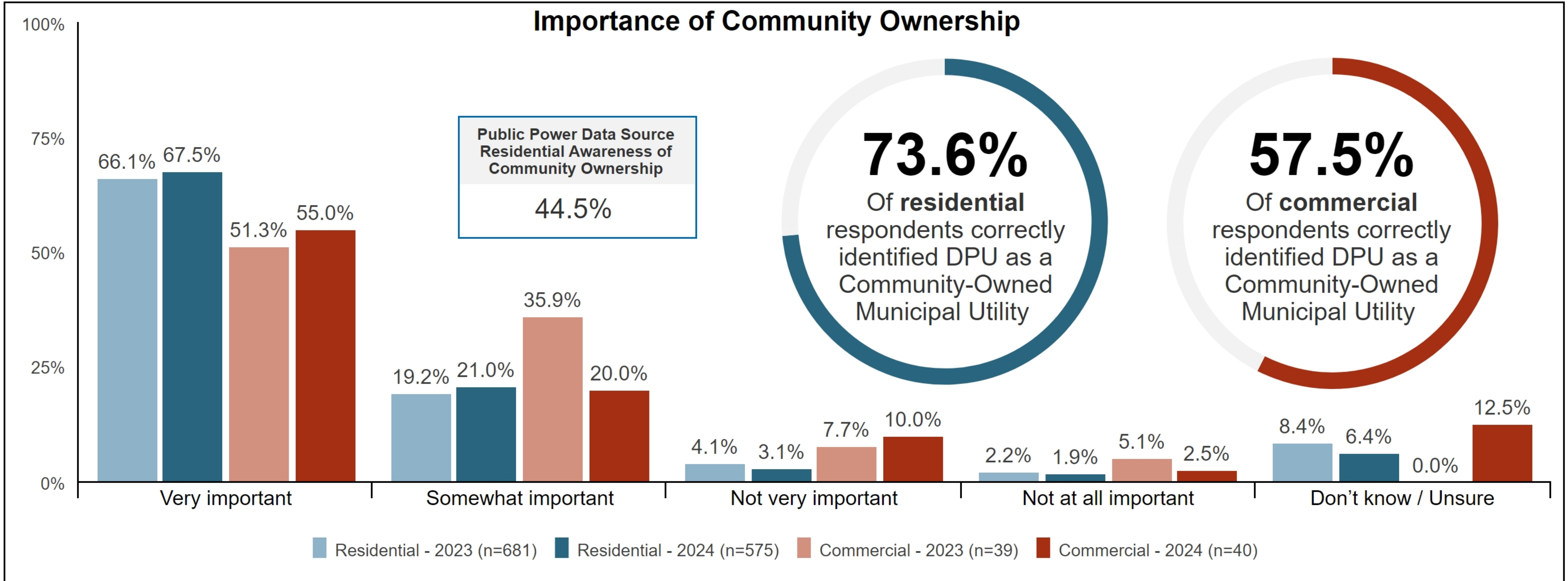


Purpose of Visit	2024	
	Residential	Commercial
Sample size	146	10
Meter reading	40.4%	40.0%
Service problem/repair	25.3%	50.0%
Outage restoration	5.5%	0.0%

Communication & Awareness

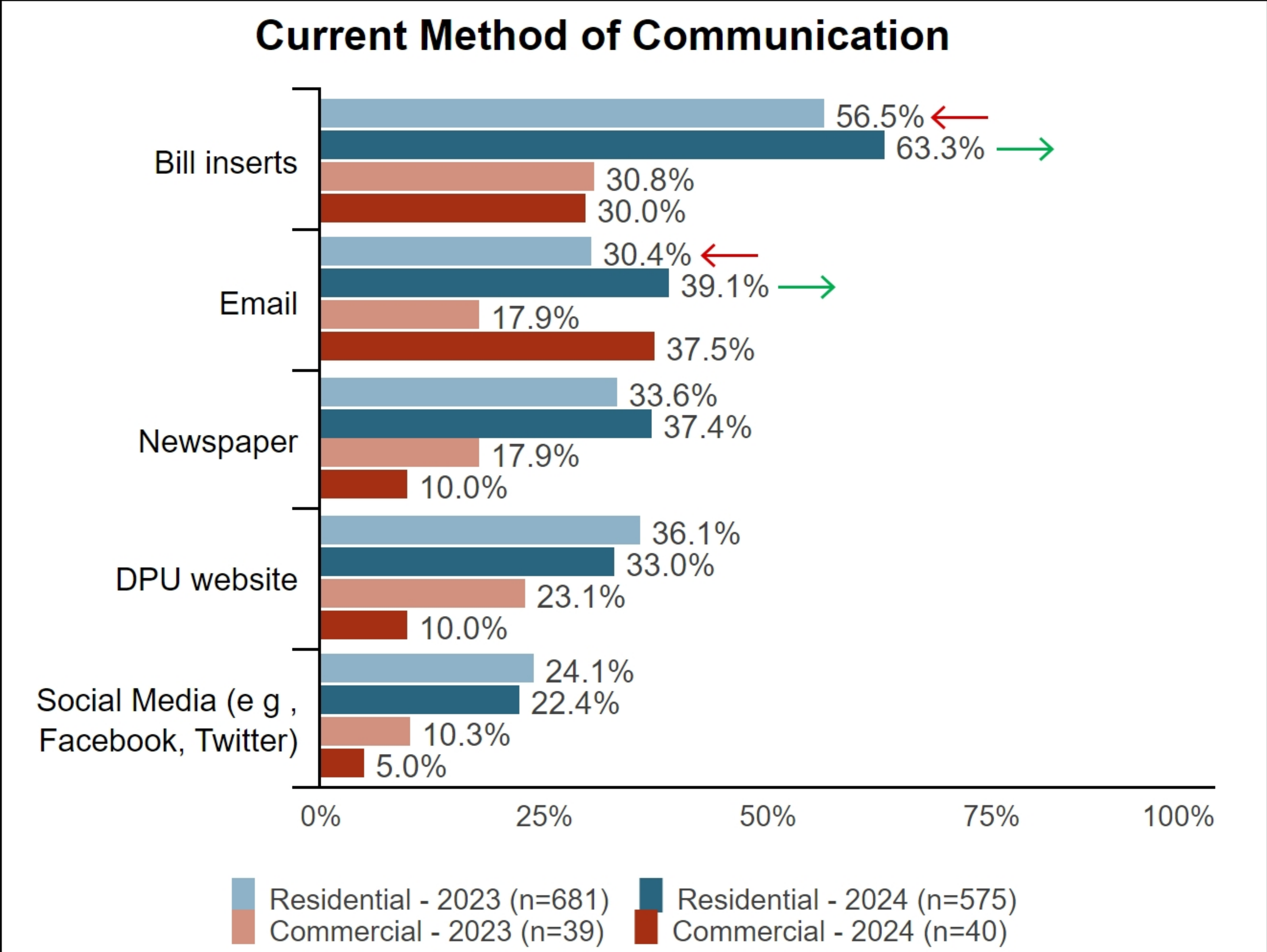
Awareness | Community Ownership

Nearly three-quarters of residential customers and nearly three-fifths of commercial customers correctly identified the DPU as a Community-Owned Municipal Utility. Additionally, nearly nine-out-of-ten residential customers (88.5%) and three-quarters of commercial customers (75.0%) indicated it is either "very important" or "somewhat important" to maintain local control of their municipal utility.

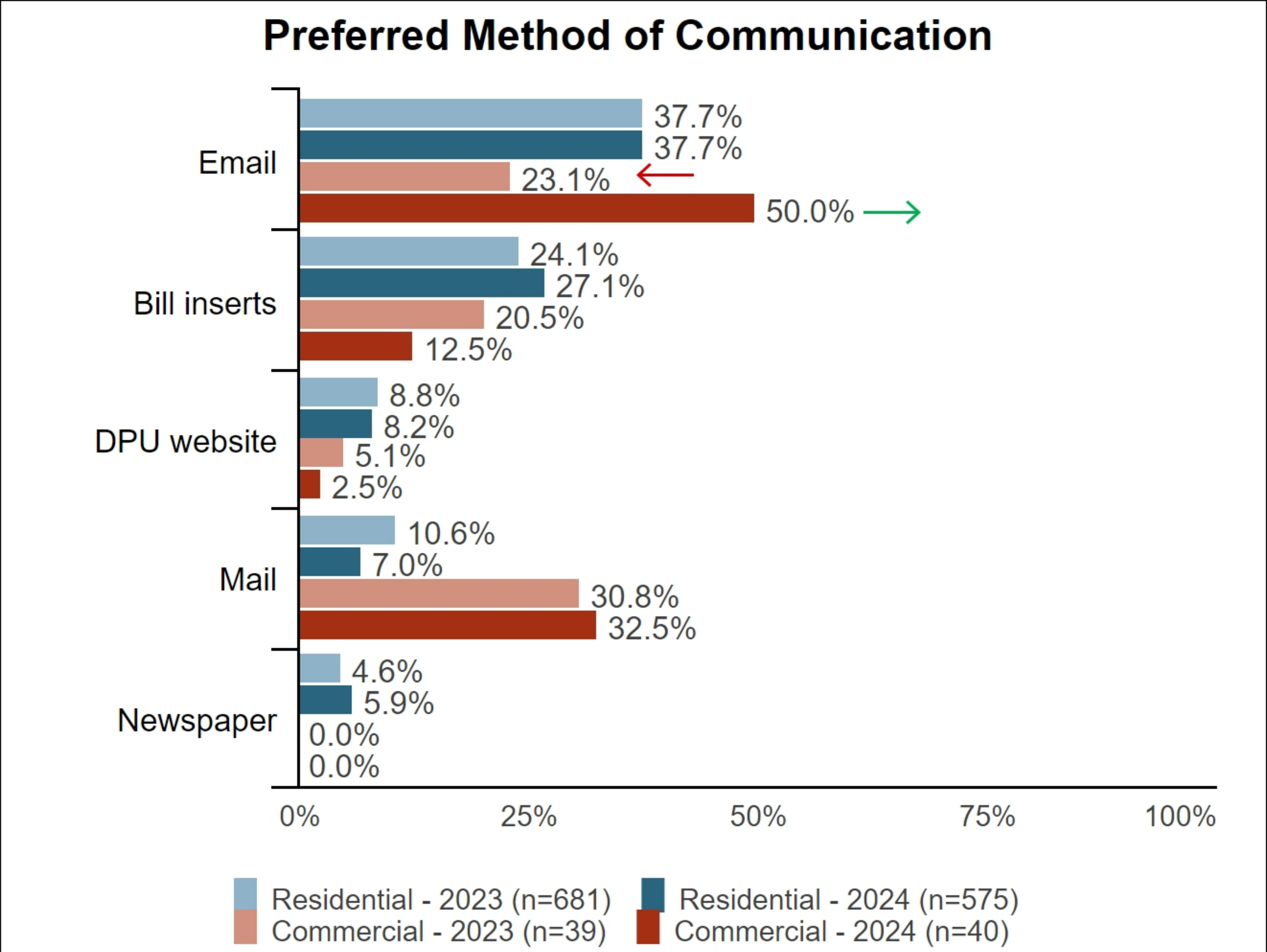


Communication | Current vs. Preferred Methods

The most common methods of receiving information among residential and commercial customers were through bill inserts and email. Over one-third of residential customers and one-half of commercial customers reported a preference for receiving information about the DPU through "email," with an increased frequency of commercial customers reporting a preference for email communication. Further, nearly one-third of commercial customers reported a preference for receiving information about the DPU through the "mail."



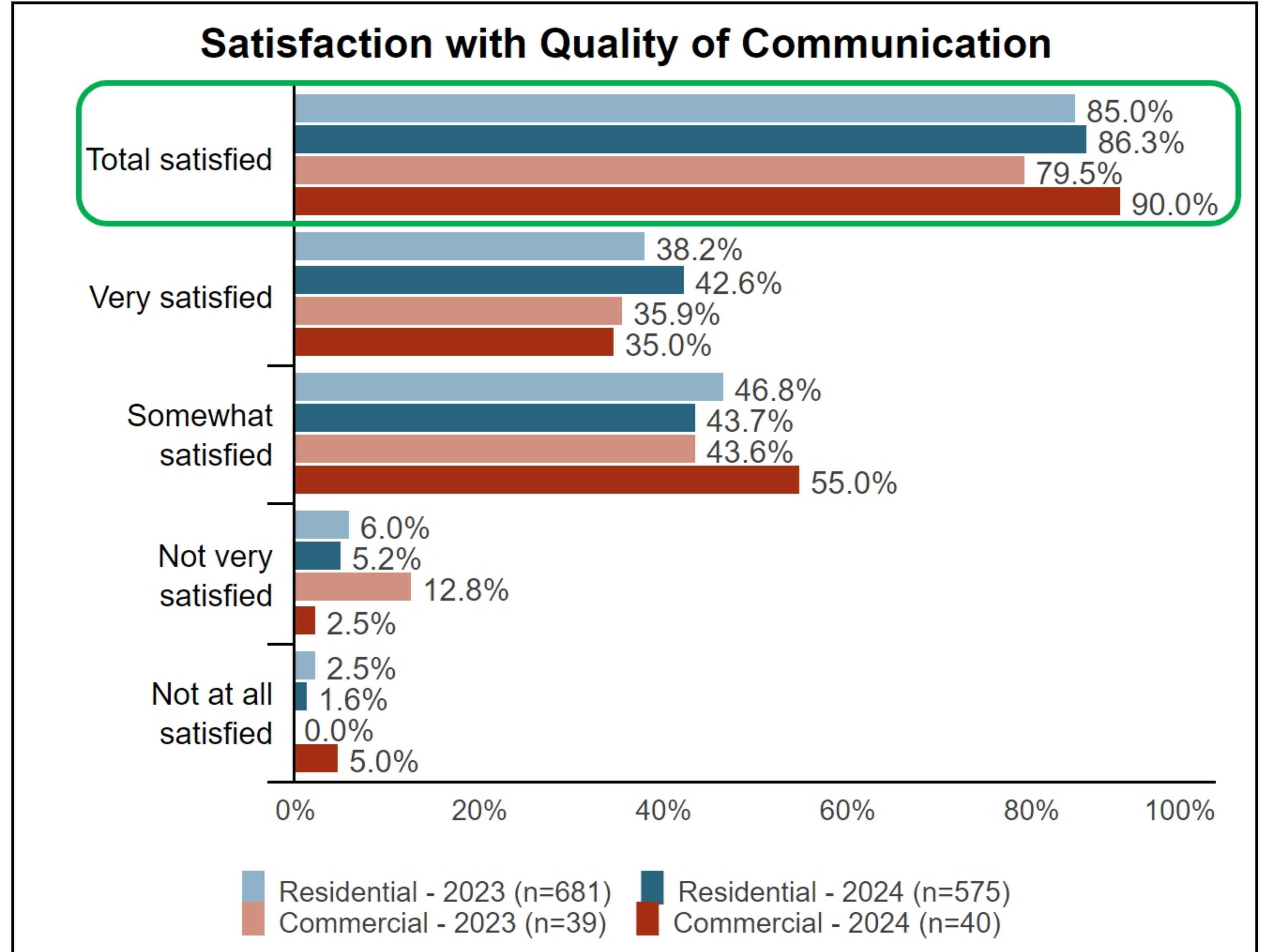
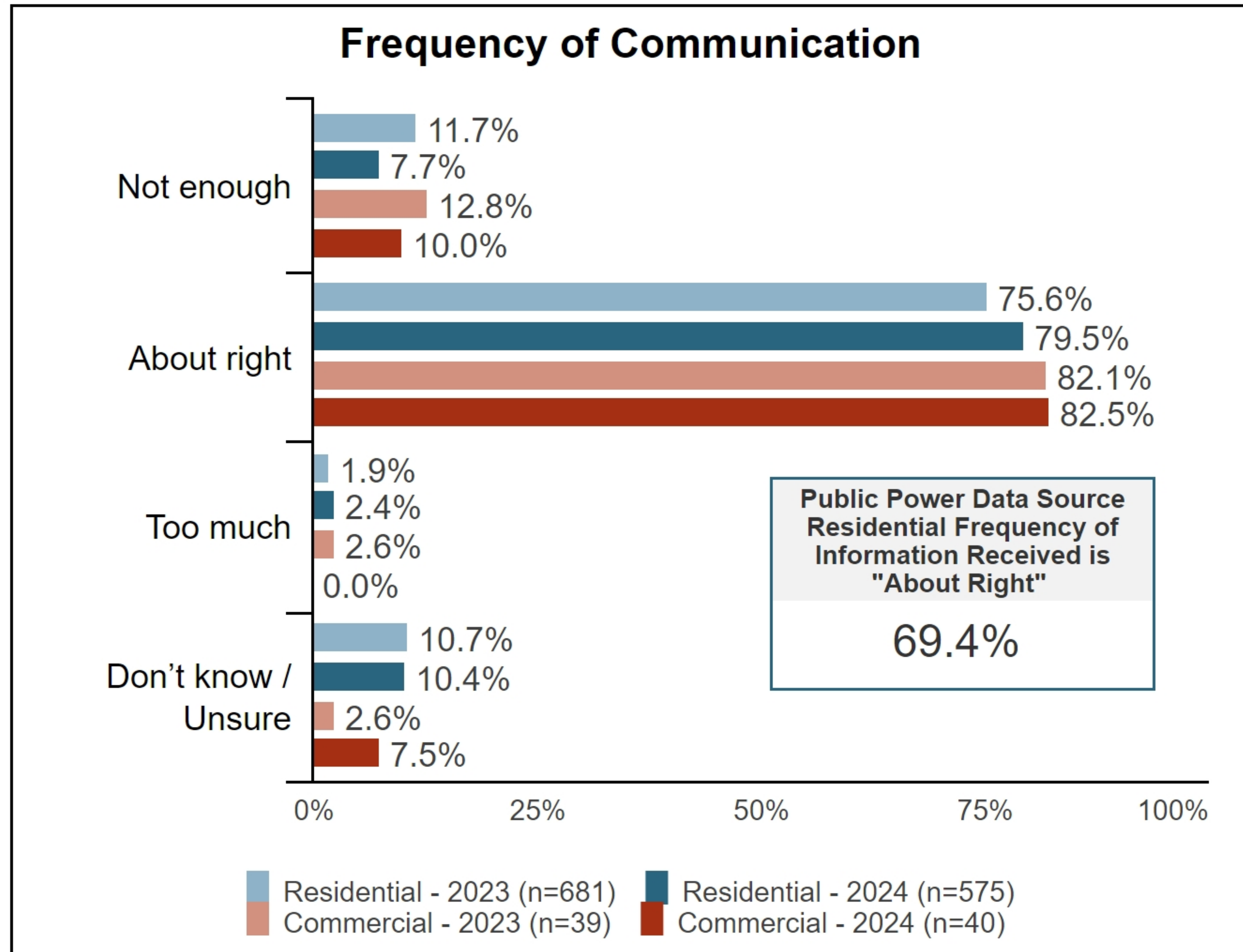
Top 5 responses shown



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

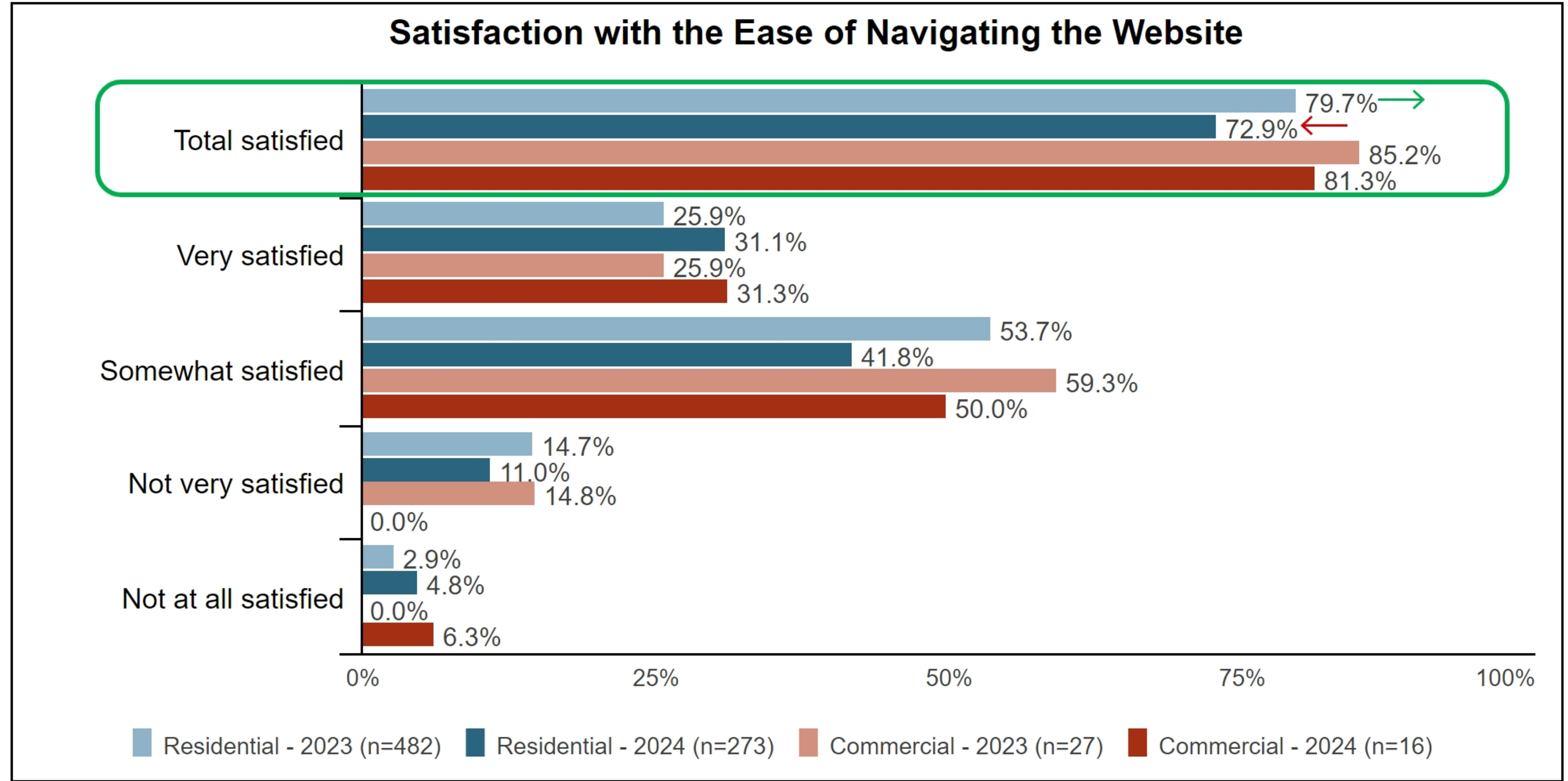
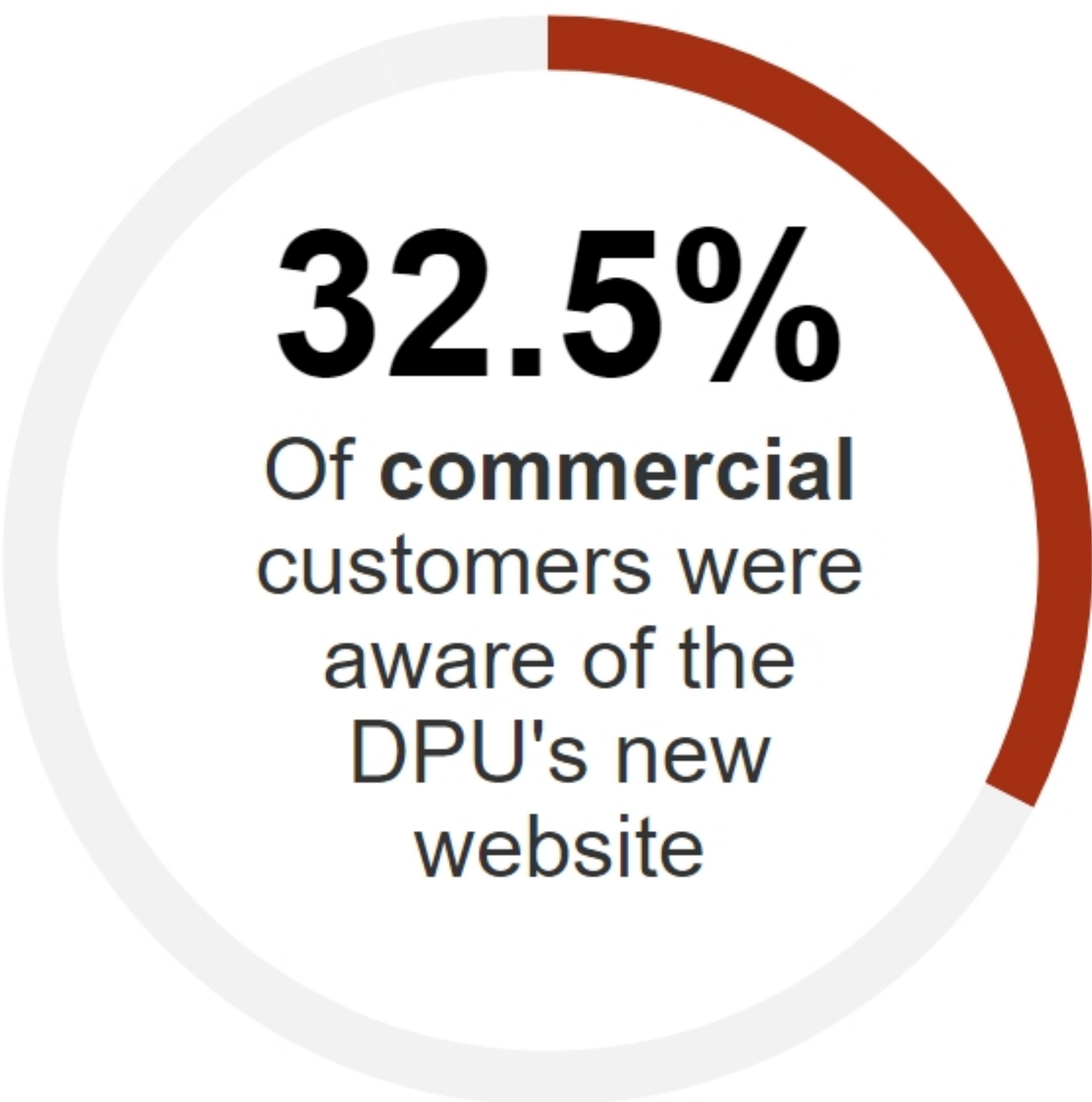
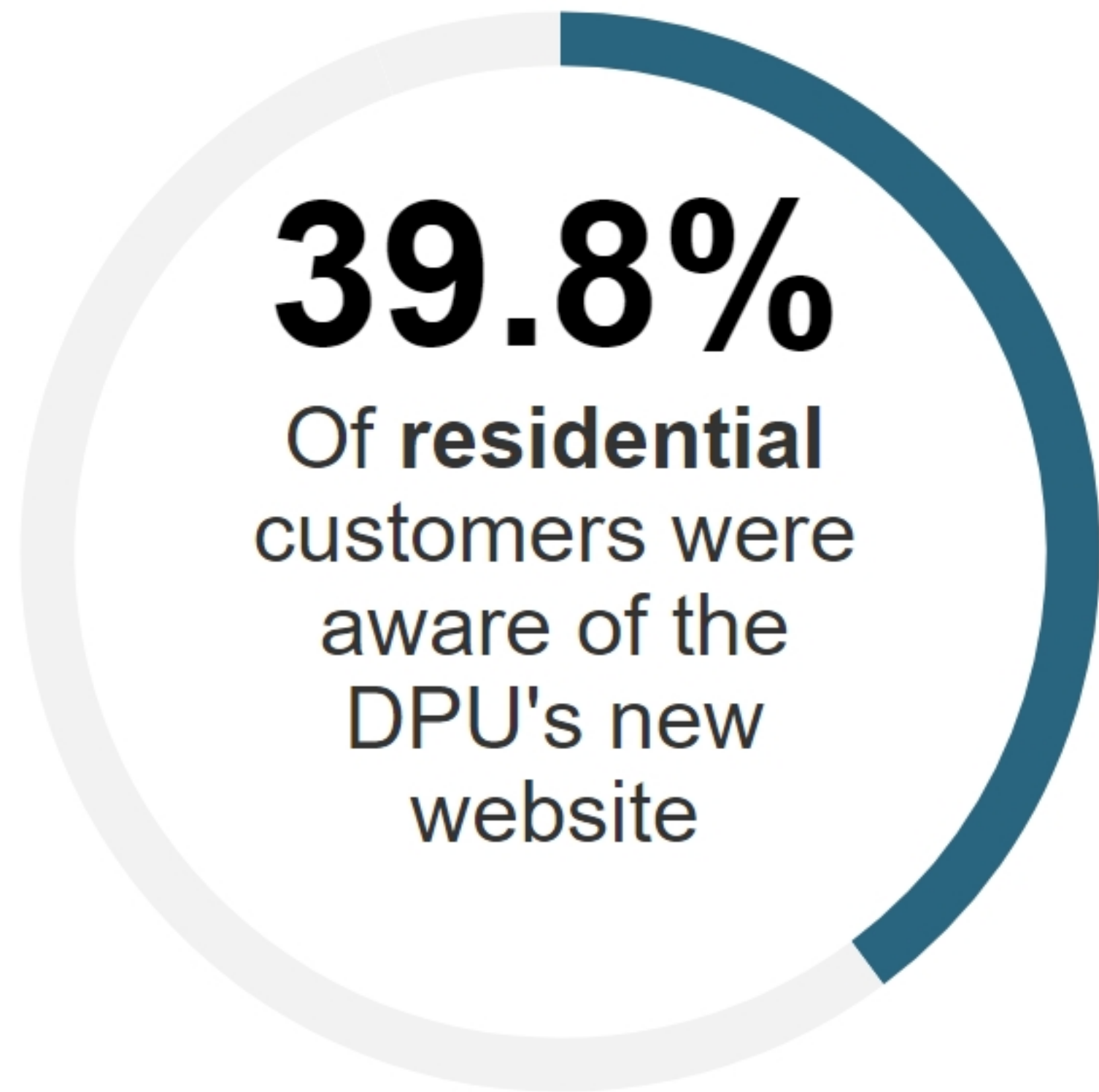
Communication | Satisfaction with Frequency and Quality

A majority of residential customers and commercial customers indicated the frequency at which they receive information from the DPU is "about right." Similarly, a majority of residential customers and commercial customers reported being satisfied with the quality of communication they receive from the DPU, with a slight increase in commercial customers reporting satisfaction with the quality of communication received.



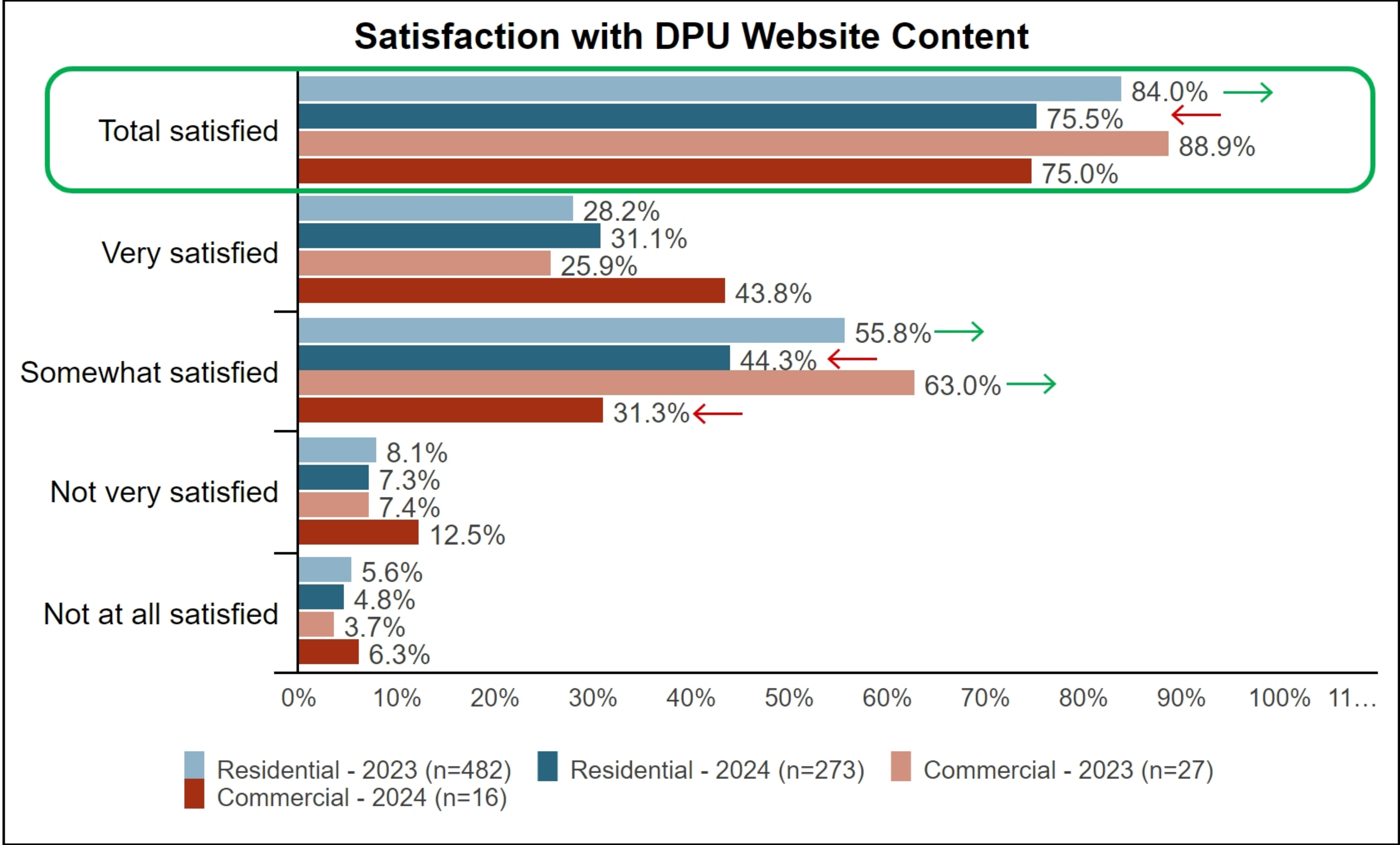
Communication | Satisfaction with Website Ease of Use

Nearly three-quarters of residential customers who have used the DPU's website in the past 12 months reported being satisfied with the website's ease of use and navigation, which is a decrease from 79.7% who reported the same in 2023. A slightly decreased frequency of commercial customers reported being satisfied with the ease of navigating the DPU's website.



Communication | Satisfaction with Website's Content

Among customers who have visited the DPU's website in the last 12 months, three-quarters of residential and commercial customers reported they were satisfied with the website's content. However, there was a significant decrease in satisfaction among residential customers, and a slight decrease in satisfaction among commercial customers. Those customers who reported being dissatisfied with the website's content primarily indicated this is because the "website is difficult to use / not user friendly."



Reasons for Dissatisfaction

Reasons for Dissatisfaction	2024	
	Residential	Commercial
Sample size	33	3
Website is difficult to use / not user friendly	42.4%	33.3%
Overall update of technology needed	12.1%	0.0%
Information not easily accessible	12.1%	0.0%
Online billing needs updating / streamlining	9.1%	0.0%
Difficult to make payment	6.1%	0.0%
Not enough information provided	6.1%	33.3%

Top 6 responses shown

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

Portal | Satisfaction with Bill and Payment Portal

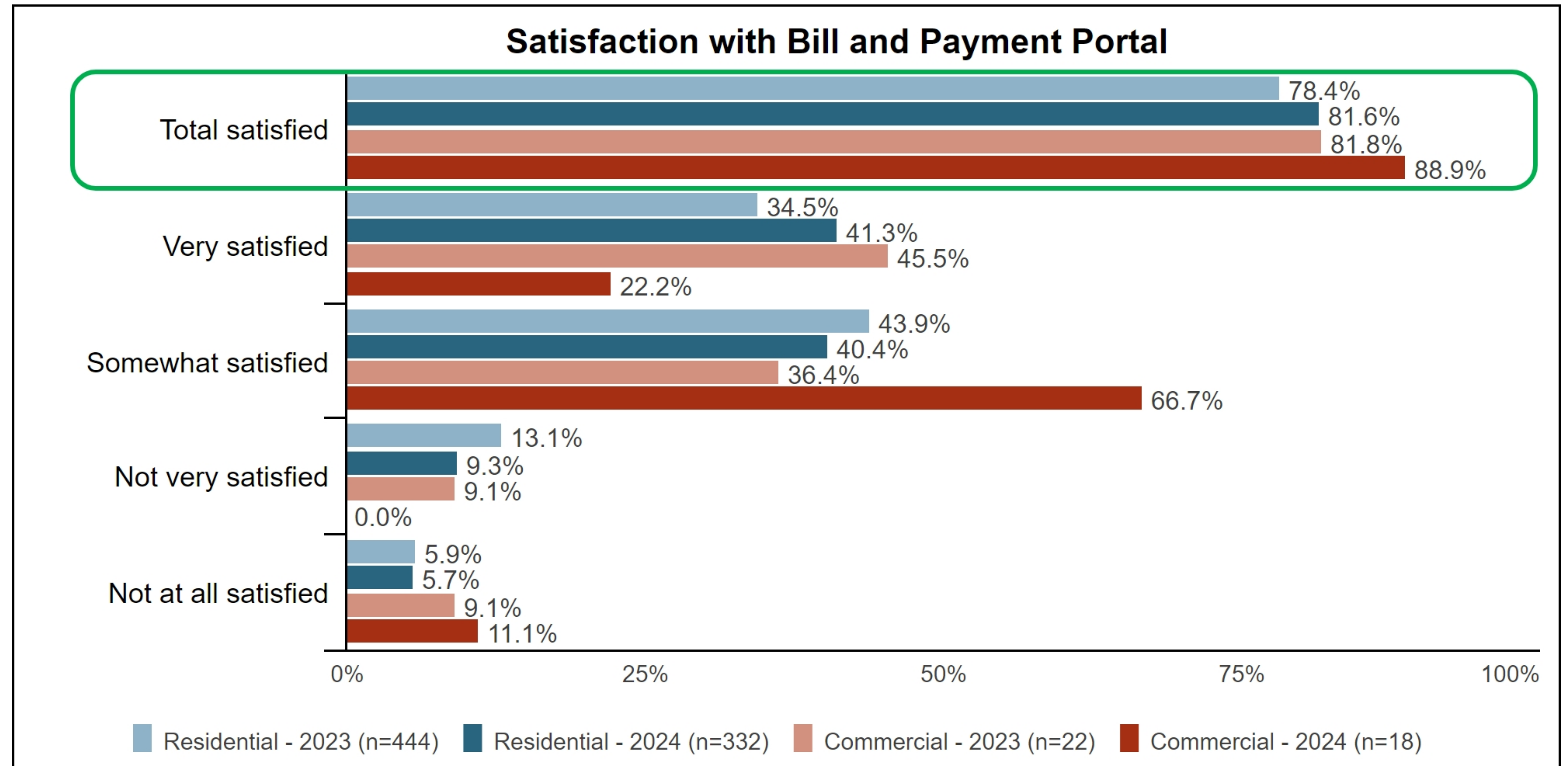
Nearly three-fifths of residents and over two-fifths of businesses reported using the Bill and Payment Portal. Among those respondents who have used the Bill and Payment Portal, over four-fifths of residents and businesses reported being satisfied with their experience using the portal.

57.7%

Of residential customers have used the Bill and Payment Portal

45.0%

Of commercial customers have used the Bill and Payment Portal



Portal | Satisfaction with Automated Metering Portal

Nearly one-quarter of residents and one-out-of-ten businesses reported using the Automated Metering Portal. Of those customers that have used the Automated Metering Portal, over four-fifths of residents and all businesses reported being satisfied with their experience using the portal.

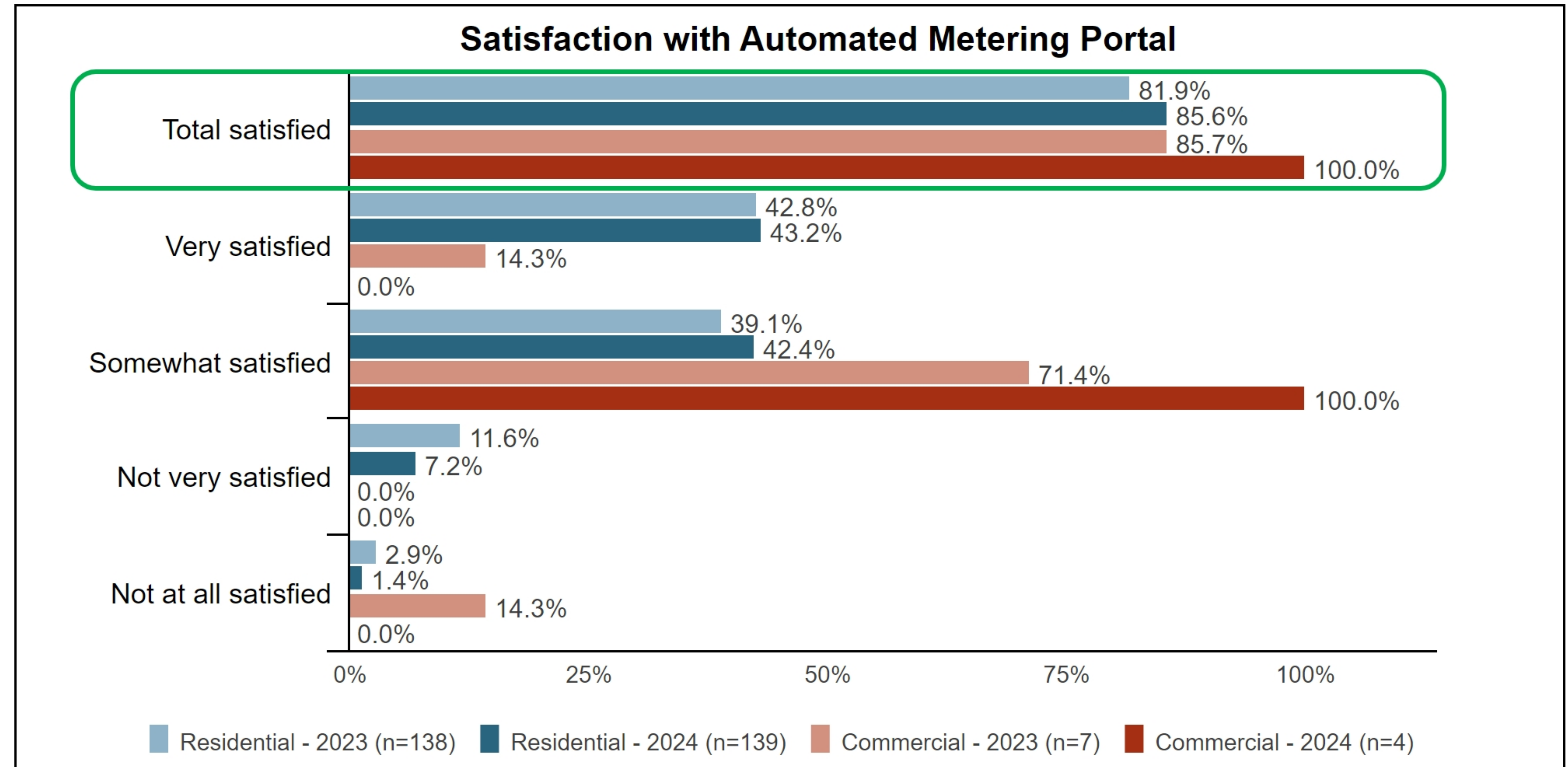
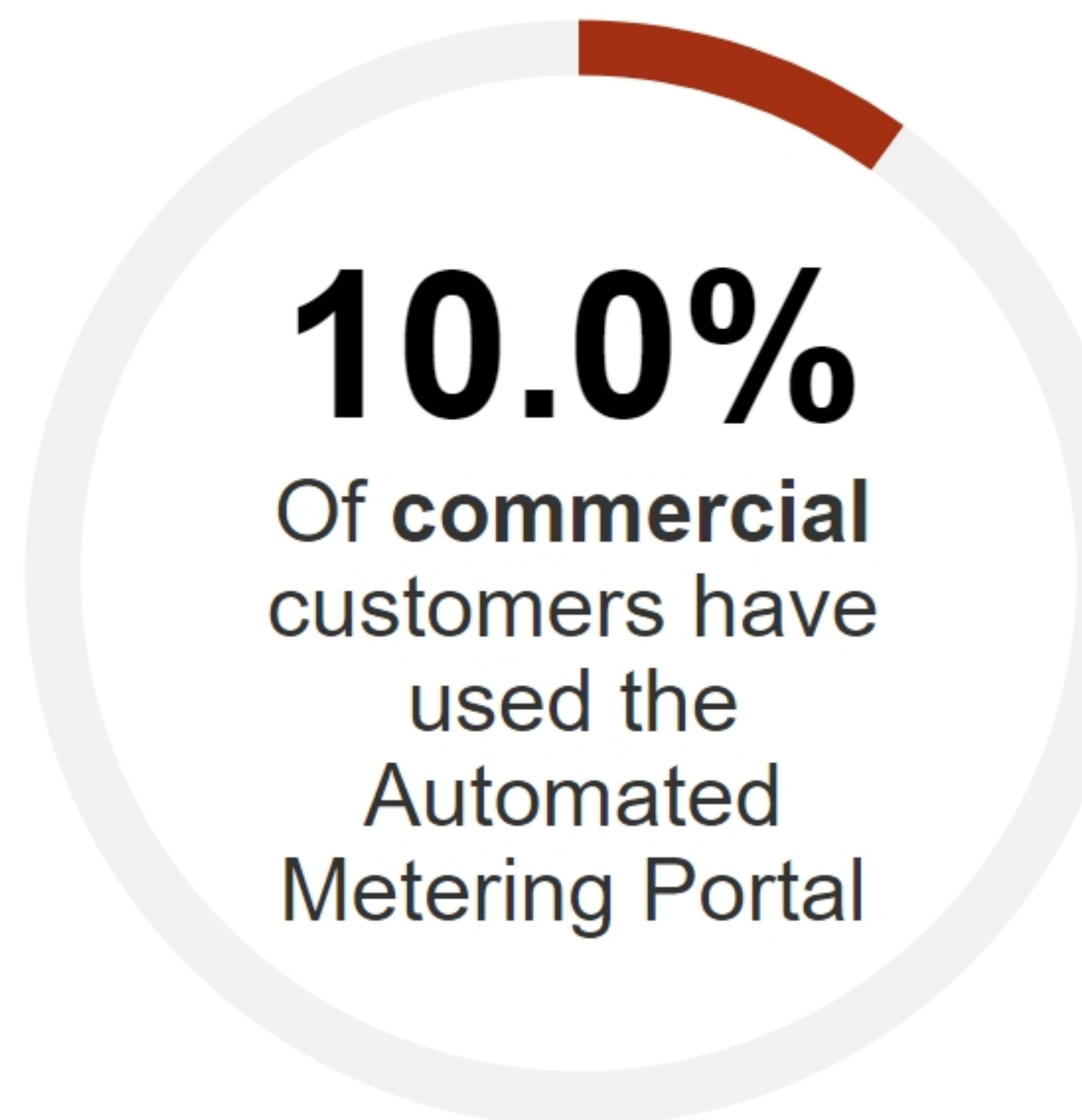
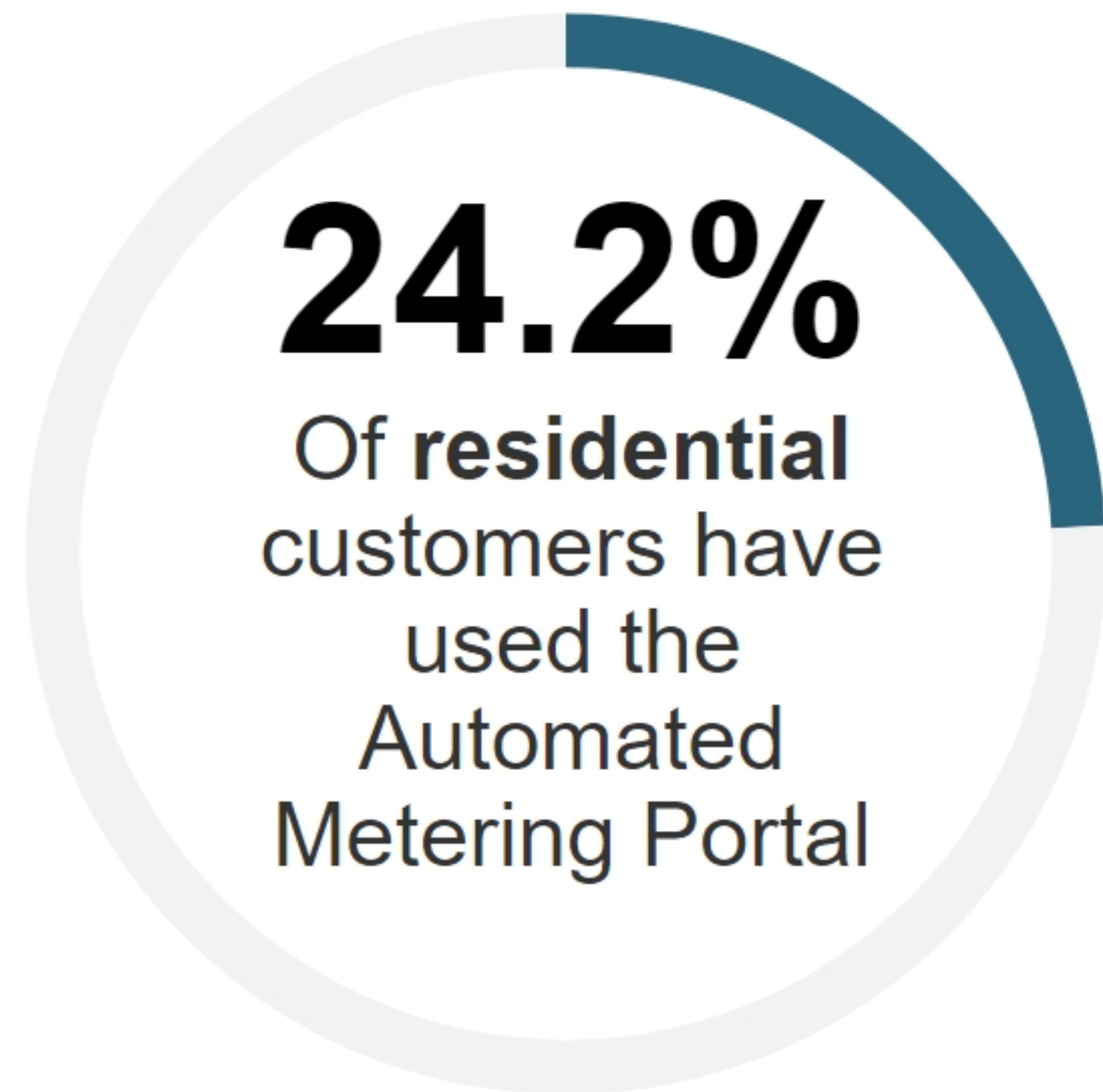


Table of Contents

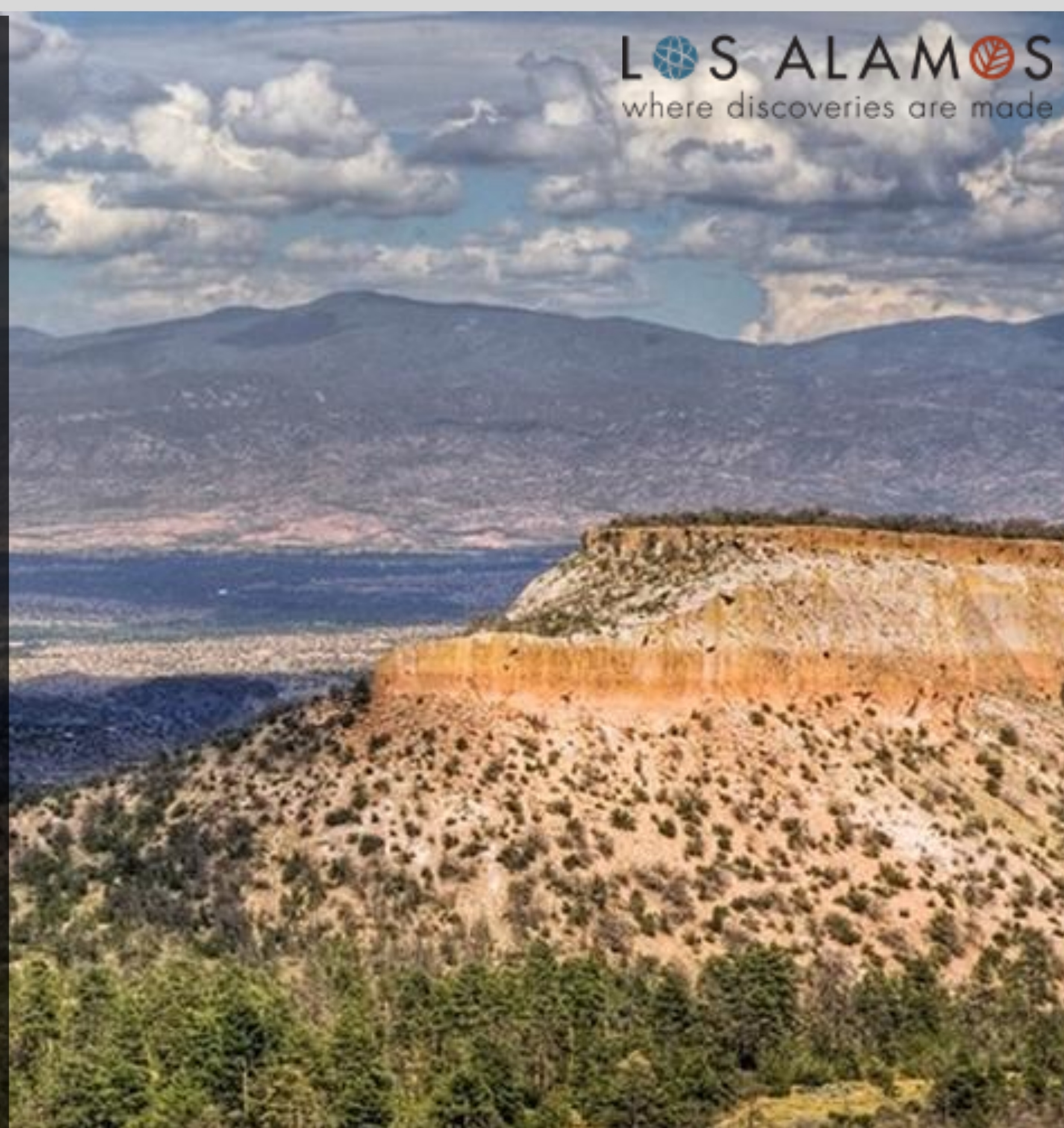
SECTION ONE
About GreatBlue

SECTION TWO
Project Overview

SECTION THREE
Key Study Findings

SECTION FOUR
Considerations

SECTION FIVE
Aggregate Data (Provided Separately)



Considerations



Prioritize Digital Communication Methods

Customers in 2024 emphasized the importance of effective communication and transparency in company operations and policies. Notably, poor communication and lack of information were cited as significant factors contributing to dissatisfaction among residential customers. It is clear that customers value timely and transparent communication regarding service updates, pricing structures, and company policies. While a majority of residential customers currently receive information through bill inserts, there is a growing preference for email communication. Likewise, commercial customers favor email communication, indicating a shift towards digital channels. Acknowledging these preferences by expanding email communication efforts and ensuring information accessibility through user-friendly platforms, such as the website, can significantly enhance customer satisfaction and foster stronger relationships with the DPU's customer base.



Address Concerns with Natural Gas Rates Compared to Quality Received

While there has been an increase in satisfaction with service quality among commercial customers, residential customers have expressed specific concerns, particularly regarding natural gas services. A significant portion of residential customers reported dissatisfaction with the quality of natural gas service for the price paid, indicating a clear area for improvement. Additionally, the slight decrease in satisfaction with the reliability of water, wastewater, and natural gas services among residential customers signals potential issues that need to be addressed. In future surveys, the DPU may consider adding open-end questions for those who are dissatisfied with the quality or reliability of any DPU services to answer, which invites respondents to share their concerns with the reliability or quality of the DPU's services. In-depth interviews or focus groups with concerned customers may be another effective method for acquiring specific qualitative information surrounding dissatisfaction. Collecting this additional feedback will allow the DPU to better understand customer concerns and where there may be areas for improvement in its service quality and reliability.

Michael Vigeant CEO

MJV@GreatBlueResearch.com

Chris Biggs SVP, Research & Strategy

Chris@GreatBlueResearch.com

Seamus McNamee VP, Research

Seamus@GreatBlueResearch.com

Courtney Cardillo Data Analyst

Courtney@GreatBlueResearch.com

Catherine Veschi Project Manager

Catherine@GreatBlueResearch.com

Sofia Vigeant Project Assistant

Sofia@GreatBlueResearch.com



WHAT'S NEXT.



/GreatBlueResearch

20 Western Blvd
Glastonbury, CT 06033
(860) 740-4000



GreatBlue Research