



2022 Voice of Customer Study



Report of Findings

25 February 2022
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 Study leveraged a quantitative research methodology to address the following areas of investigation:

- Rating 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 483	No. of Questions 48*	Incentive None	Sample Customer List
Target Residential customers	Quality Assurance Dual-level**	Margin of Error 4.0%	Confidence Level 95%	Research Dates January 4 - February 9, 2022

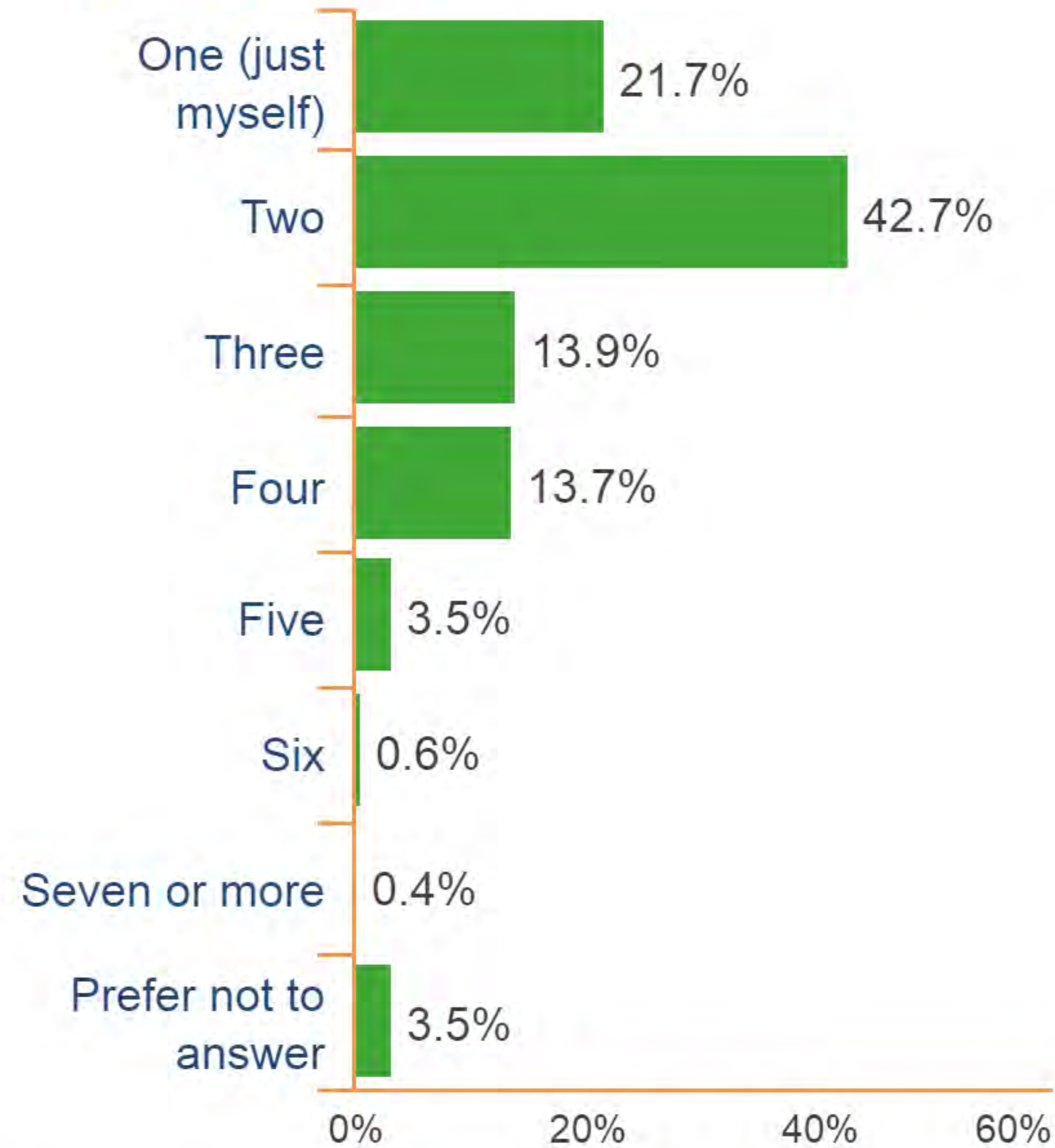
* This represents the total possible number of questions; not all respondents will answer all questions based on skip patterns and other instrument bias.

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

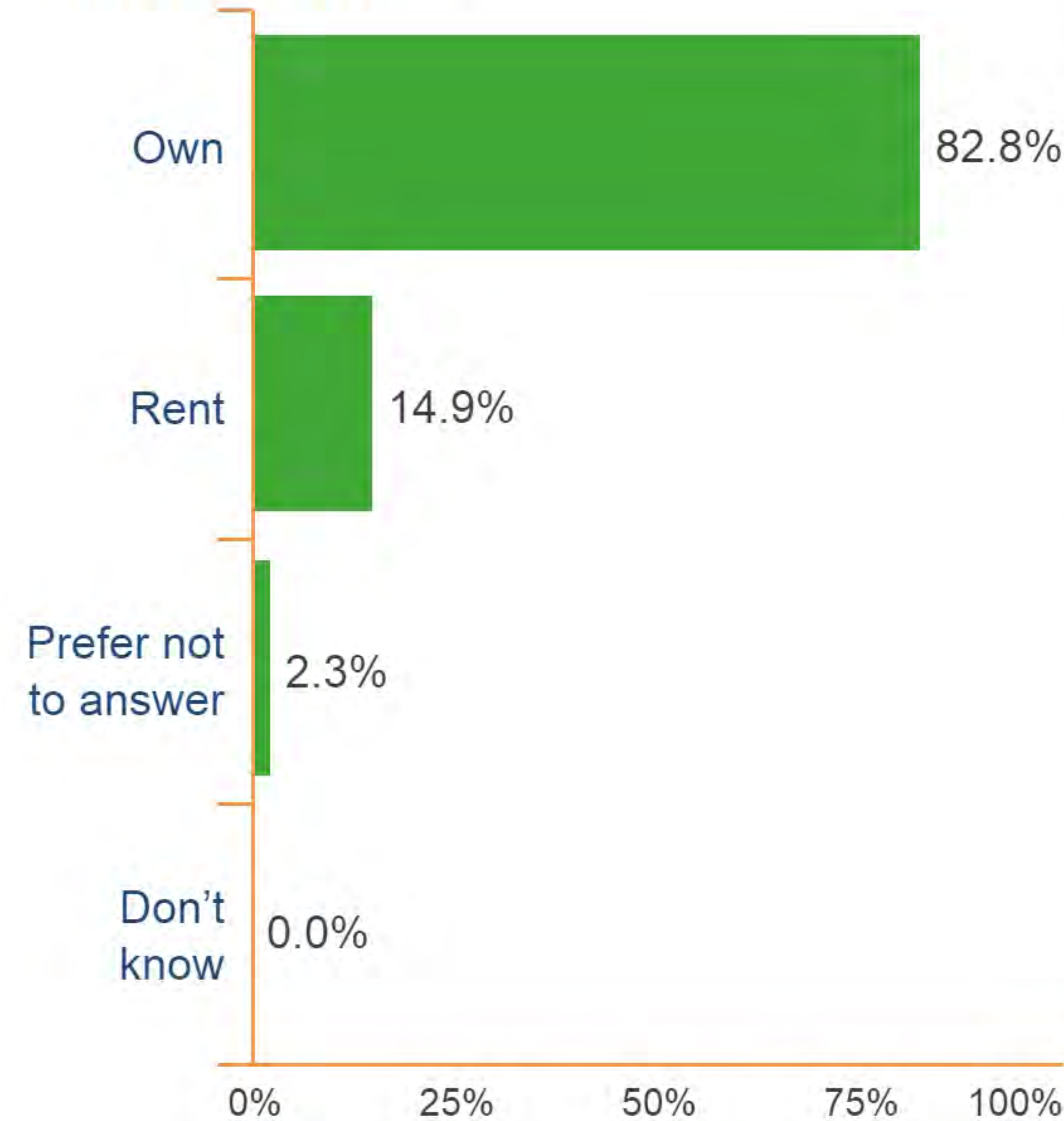
Respondent Snapshot

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.

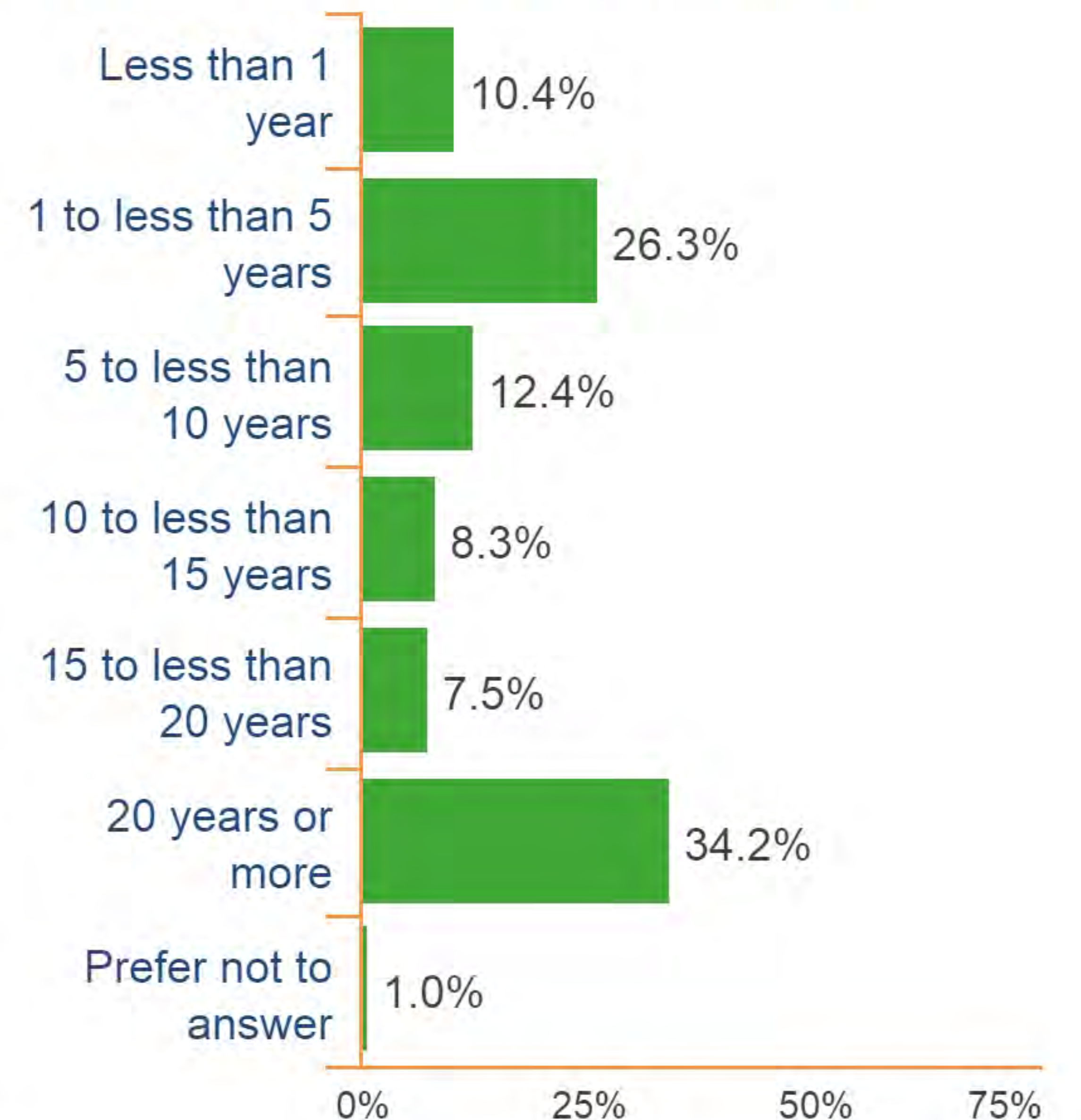
Household Size



Rent or Own



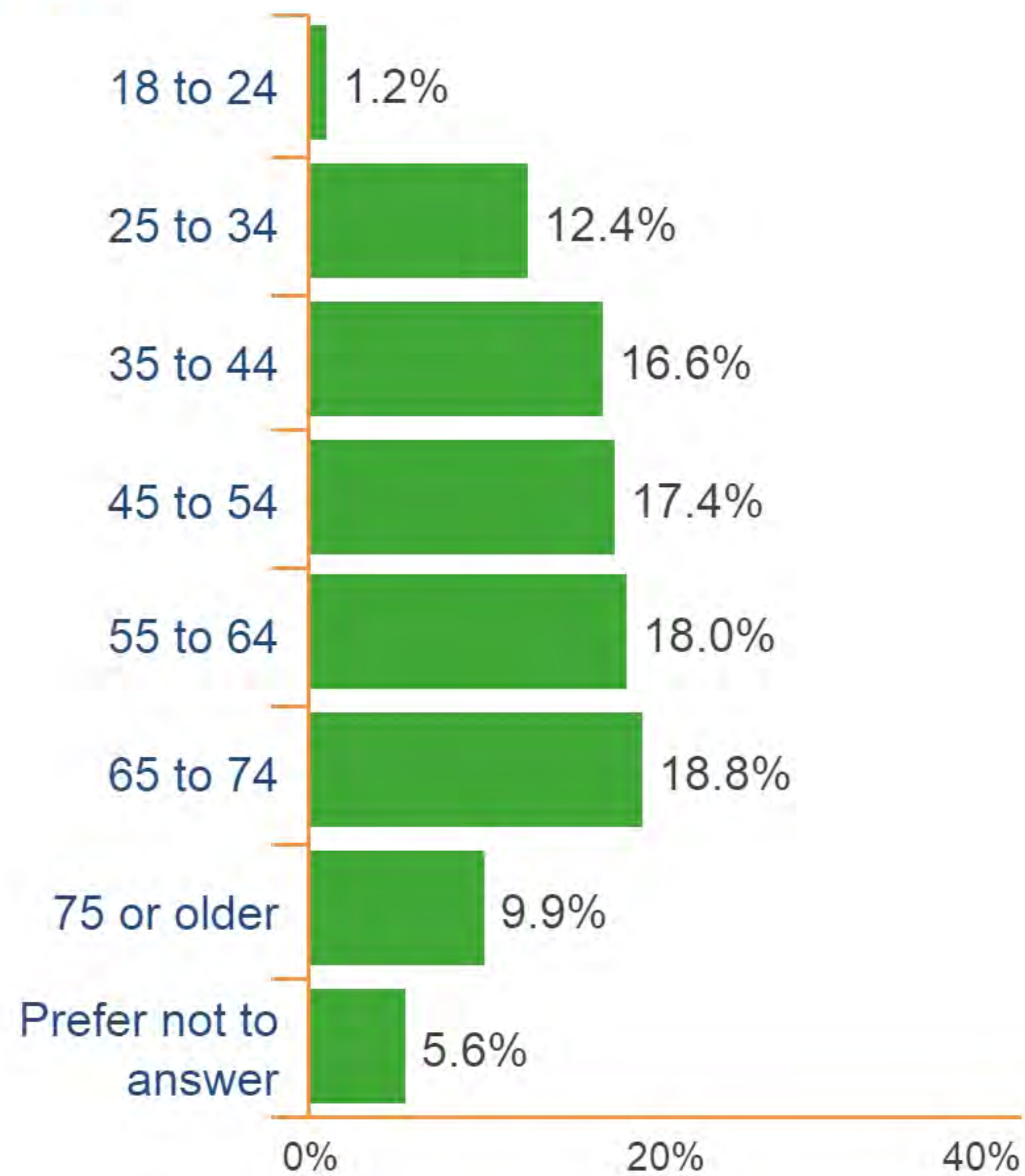
Length of Time as Customer



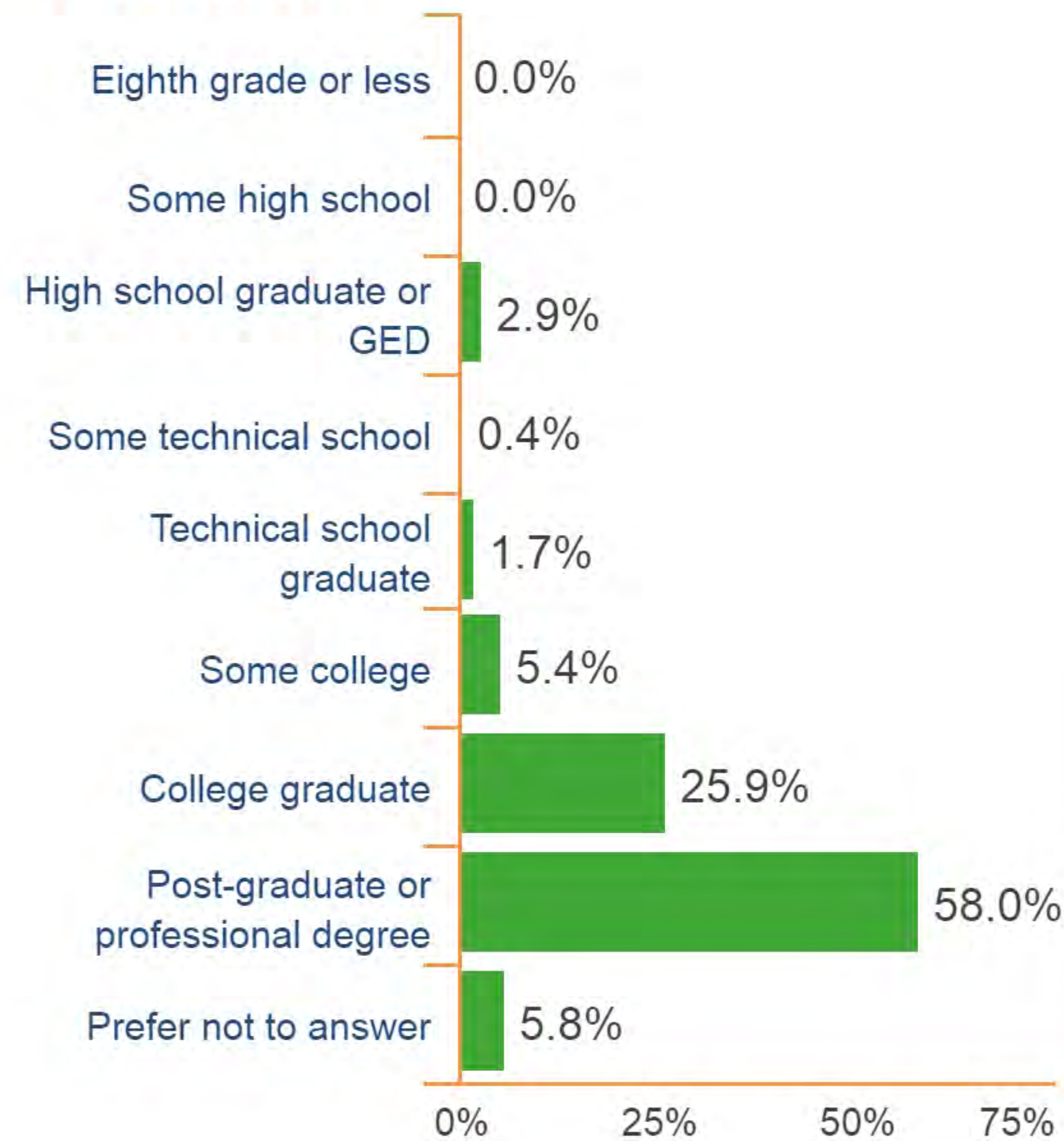
Respondent Snapshot

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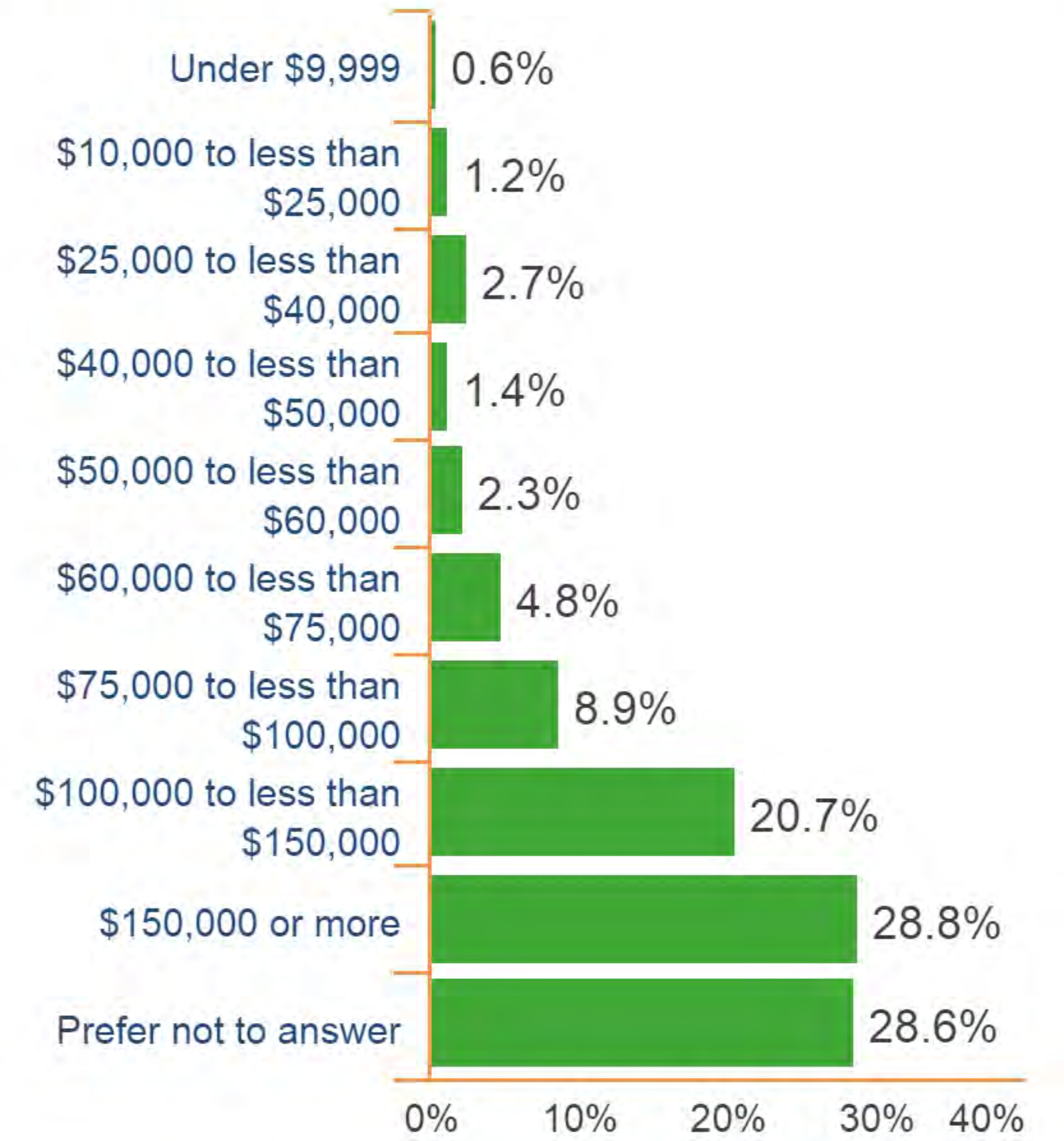
Age



Education



Income



Research Methodology Snapshot: Commercial

Methodology Digital / Telephone	No. of Completes 19 (11 phone + 8 online)	No. of Questions 40*	Incentive None	Sample Customer List
Target Commercial customers	Quality Assurance Dual-level**	Margin of Error 21.9%	Confidence Level 95%	Research Dates January 4 - February 9, 2022

* 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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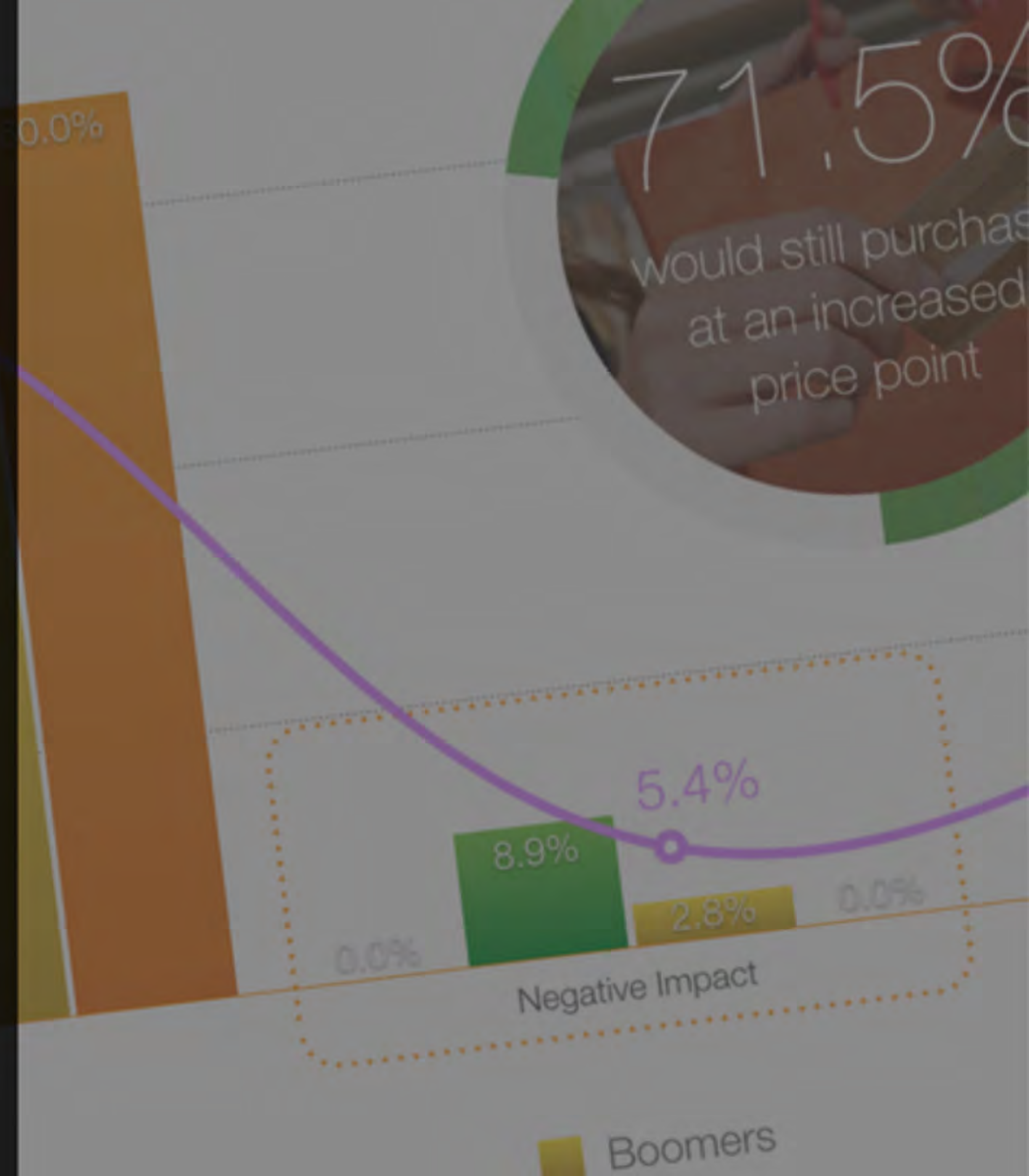
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Key Study Findings - *Focus on Improving First Contact Resolution*



What we learned:

Roughly one-half of residential and commercial respondents indicated that when they contact DPU, their questions or issues are "taken care of the first time." The frequency of DPU respondents who reported their issues are "taken care of the first time" is lower than the national Public Power Data Source average.

Takeaway:

One-half of customers are reporting their issues being taken care of during their first point of contact with DPU's customer service, and high rates of first contact resolution are generally linked with high ratings for customer service personnel, and the utility as a whole.

Actionable strategy:

The DPU should focus on improving the rate of issues that are resolved upon the first point of contact with customer service personnel, through examining the training and resources for the customer service department and determining if there are any ways these can be improved to ensure a more efficient experience when contacting DPU.

Key Study Findings - *Improve Website's Ease of Use and Navigation*



What we learned:

Among those respondents who visited DPU's website in the last 12 months, three-quarters of residential respondents and all commercial respondents reported being satisfied with the website's content. However, those who indicated they were dissatisfied with the website's content indicated this is because the "website is difficult to use / not user friendly," the "information is not easily accessible" and it is "difficult to make payment."

Takeaway:

Primary reasons for being dissatisfied with the DPU's website's content were pertaining to difficulties navigating the website and finding information.

Actionable strategy:

DPU may consider conducting a user experience (UX) test to determine areas of their website customers are finding challenging to navigate or information that is not easily accessible, in order to make improvements to the website.

Key Study Findings - *Provide Conservation Tips to Customers*



What we learned:

When rating the DPU on a series of organizational characteristics, respondents provided the lowest ratings for "helping customers conserve electricity, gas and water." Further, when asked the reason for providing poor ratings for any organizational characteristic, "cost / too expensive" was a primary reason respondents mentioned, while some residential respondents indicated DPU "needs to provide conservation tips."

Takeaway:

Improved ratings for "helping customers conserve electricity, gas and water" would help improve DPU's average positive rating for organizational characteristics.

Actionable strategy:

In order to increase ratings for "helping customers conserve electricity, gas and water," DPU should offer tips to customers for ways they can conserve resources at home or at their business, and information about how these conservation practices will help them save money on their bill.

Ratings for Organizational Characteristics

When rating the DPU on a series of organizational characteristics, residential respondents provided an average positive rating of 64.2%, and commercial respondents provided an average rating of 67.6%. Of note, residential respondents provided the highest ratings for DPU having a "helpful and knowledgeable staff" (79.5%), while commercial respondents provided the highest ratings for "community outreach" (81.8%). However, both customer bases provided the lowest ratings for the DPU "helping customers conserve electricity, gas and water" (48.6% residential, 50.0% commercial).

	Residential	Commercial	Public Power Data Source
Communicating with customers	73.4%	64.7%	68.3%
Responding promptly to customer questions and complaints	76.0%	75.0%	68.8%
Helping customers conserve electricity, gas, and water	48.6%	50.0%	58.5%
Being transparent about company operations and policies	52.6%	60.0%	62.9%
Providing good service and value for the cost of the service	59.5%	71.4%	64.2%
Community outreach	55.1%	81.8%	63.5%
Helpful and knowledgeable staff	79.5%	71.4%	68.3%
Overall satisfaction with DPU	69.1%	66.7%	69.9%
Average	64.2%	67.6%	65.6%

Poor Ratings Provided Because of Cost and Outages

Among the 141 residential respondents who provided poor ratings for DPU for any company characteristic, the majority indicated this is because of the "cost / too expensive" (15.6%), "frequent outages / unreliable service" (13.5%)" or "poor communication / lack of information / not responsive" (11.3%).

The three (3) commercial respondents who provided poor ratings indicated this was because of the "cost / too expensive," "poor communication / lack of information / not responsive" or their "questions [were] not answered."

Please indicate why you provided a poor rating for DPU? (Top 14 responses)

	Residential	Commercial
<i>Sample size</i>	141	3
Expressed multiple reasons	17.7%	0.0%
Cost / too expensive	15.6%	33.3%
Frequent outages / unreliable service	13.5%	0.0%
Poor communication / lack of information / not responsive	11.3%	33.3%
Billing issues	5.7%	0.0%
Need to provide conservation tips	5.0%	0.0%
Difficult to submit payment	4.3%	0.0%
Poor customer service / support	3.5%	0.0%
Website is difficult to navigate / not user friendly	3.5%	0.0%
Average / nothing special	2.8%	0.0%
No outage notification system	2.8%	0.0%
No community outreach	2.1%	0.0%
Slow / poor response to issues	2.1%	0.0%
Questions not answered	1.4%	33.3%

Satisfied with Quality of Natural Gas and Water Service

Roughly nine-out-of-ten respondents indicated they are satisfied with the quality of natural gas service (95.3% residential, 89.5% commercial) and water service (90.8% residential, 94.7% commercial) they receive from the DPU. Additionally, the majority of residential respondents indicated they are satisfied with the quality of wastewater service (89.4%) and electric service (85.5%) they receive from the DPU.



How satisfied are you with the **quality** of the service(s) you receive from DPU. (Total "satisfied")

	Residential	Commercial
Natural Gas	95.3%	89.5%
Water	90.8%	94.7%
Wastewater	89.4%	83.3%
Electric	85.5%	78.9%

Satisfied with Natural Gas and Water Reliability

Over nine-out-of-ten residential respondents reported being satisfied with the reliability of natural gas (98.3%), water (96.4%) and wastewater (94.2%) services they receive from DPU, while fewer residents (71.6%) reported satisfaction with the reliability of the DPU's electric service. The majority of surveyed commercial customers reported being satisfied with the reliability of the DPU's water (94.7%) and natural gas (89.5%) services, and over four-fifths reported satisfaction with the reliability of electric (84.2%) and wastewater (83.3%) service they receive from DPU.

 Please indicate how satisfied you are with the **reliability** of the service(s) you receive from DPU. (Total "satisfied")

	Residential	Commercial
Natural Gas	98.3%	89.5%
Water	96.4%	94.7%
Wastewater	94.2%	83.3%
Electric	71.6%	84.2%

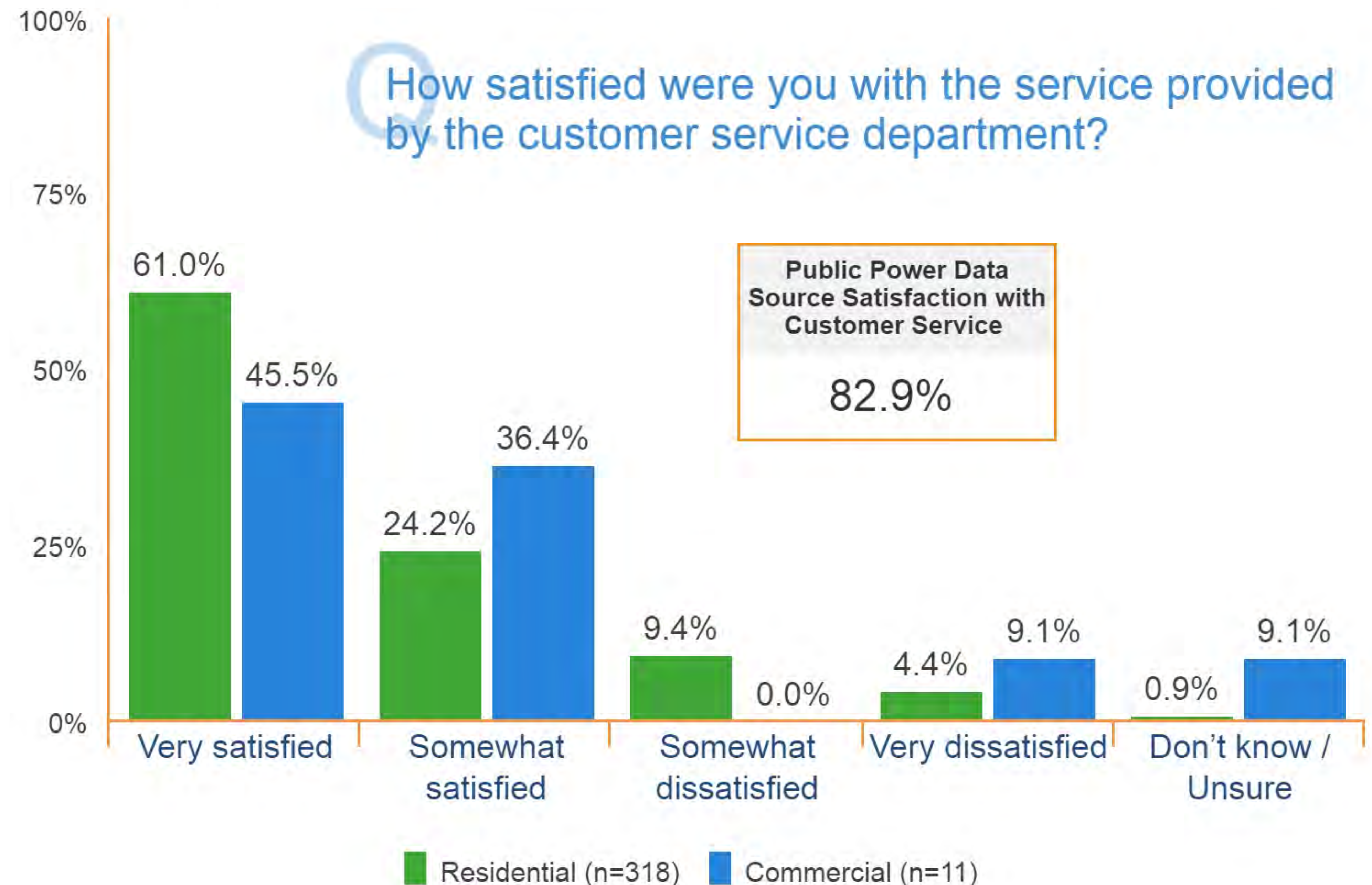
Satisfied with Customer Service Department

Among the 318 residential respondents who contacted DPU in the last 12 months, this was primarily for a "billing question" (26.1%), "electric service problem, question, issue, or concern" (22.6%) or to "move in / out" (14.8%). Commercial customers who contacted DPU in the last 12 months primarily reported doing so for a "billing question" (54.5%). Over four-fifths of residential (85.2%) and commercial (81.9%) 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)

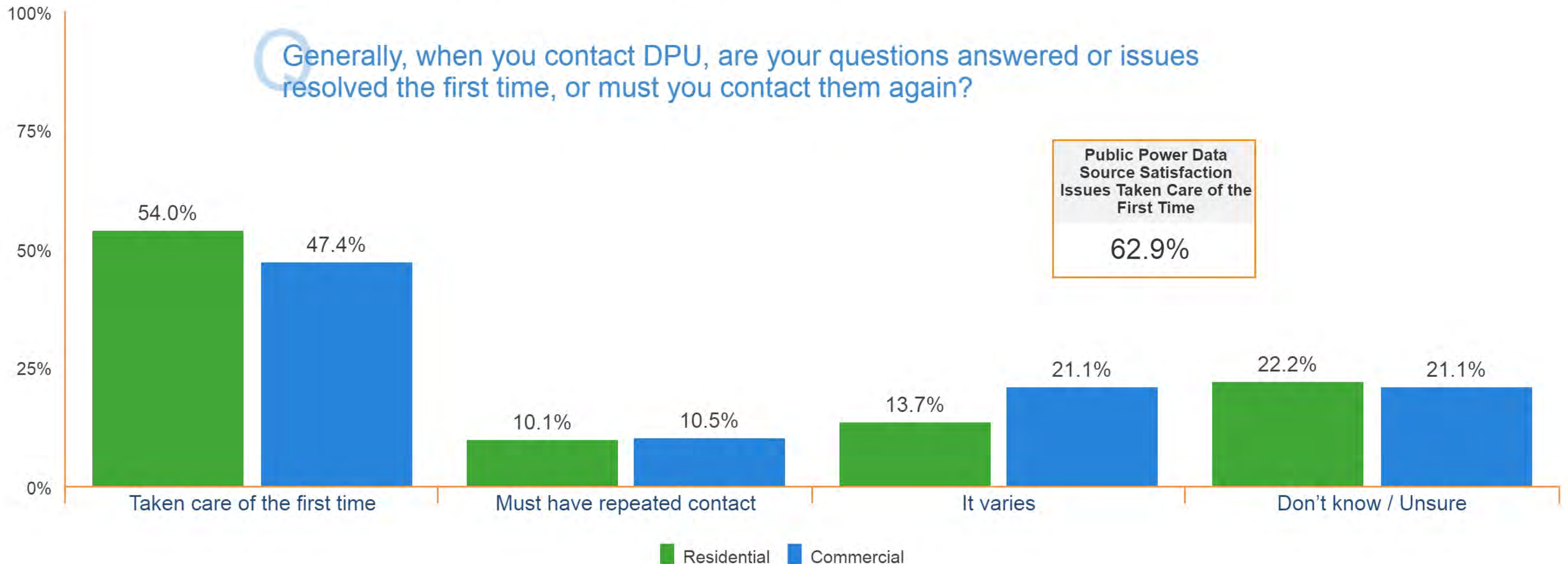
	Residential	Commercial
Sample size	318	11
Billing question	26.1%	54.5%
Electric service problem, question, issue, or concern	22.6%	9.1%
Move in/out	14.8%	0.0%
Payment or pay arrangement	8.2%	0.0%
Trash or recycling concern	7.2%	0.0%
Other (please specify):	6.3%	18.2%
Water service problem, question, issue, or concern	4.4%	9.1%
Update account details	4.1%	9.1%

How satisfied were you with the service provided by the customer service department?



Some Issues Taken Care of the First Time

Over one-half of residential respondents (54.0%), but slightly fewer commercial respondents (47.4%) indicated that when they contact DPU, their questions or issues are "taken care of the first time," while over one-fifth of respondents (22.2% residential, 21.1% commercial) were unsure. The rate of DPU respondents who reported their issues are "taken care of the first time" is lower than the national Public Power Data Source average (62.9%).

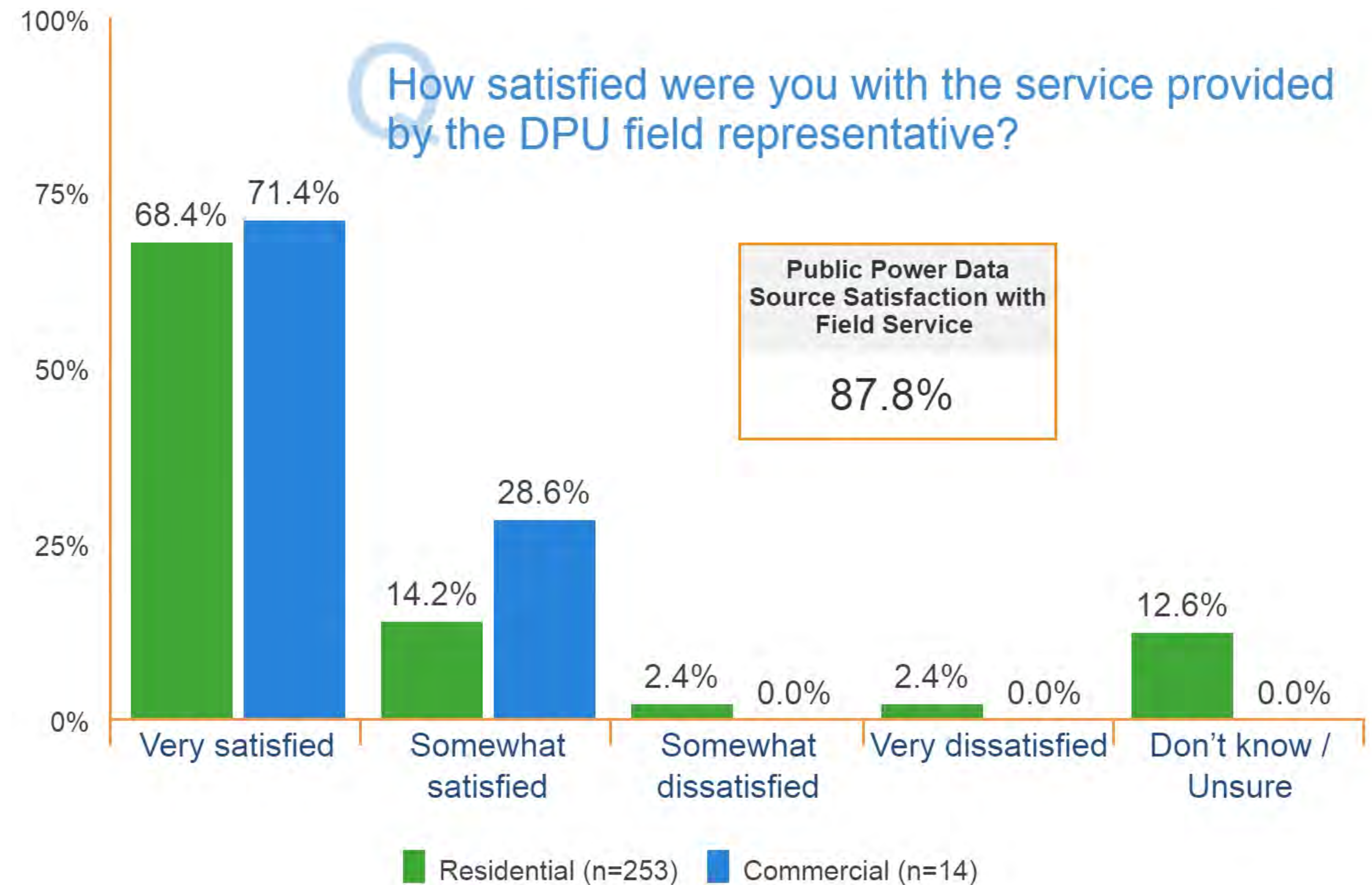


Satisfied with Field Service Representatives

Among those residential respondents who indicated a field representative visited their home in the last 12 months, reasons for the visit included a "meter reading" (51.0%) or to "install / update meter" (22.9%), while commercial respondents reported field representatives visiting for a "meter reading" (50.0%) or a "service problem / repair" (28.6%). Over four-fifths of residential respondents (82.6%) and all commercial respondents who had a field representative visit reported they were satisfied with the service provided.

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

	Residential	Commercial
Sample size	253	14
Meter reading	51.0%	50.0%
Install / update meter	22.9%	7.1%
Service problem/repair	13.8%	28.6%
Other (please specify):	10.7%	14.3%
Outage restoration	1.6%	0.0%



Satisfied with Quality of Natural Gas for Rate Paid

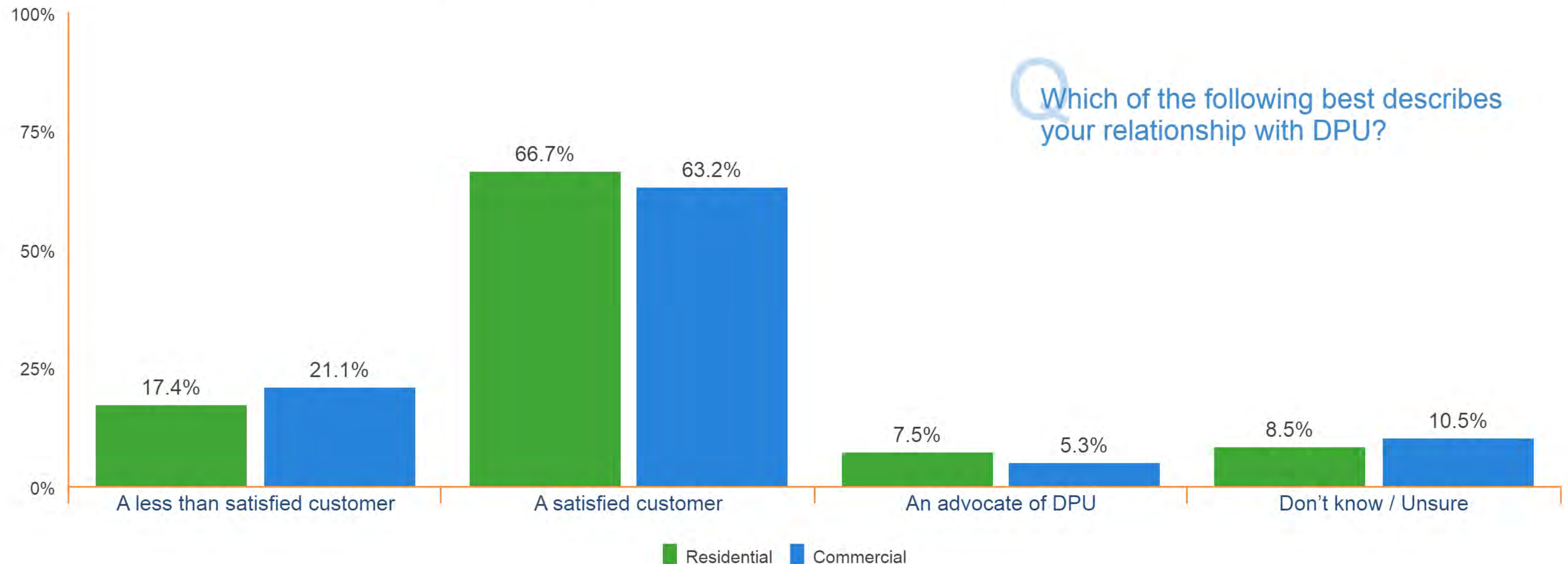
Roughly three-quarters of residential (72.3%) and commercial (78.9%) respondents indicated they are satisfied with the rate they pay for the quality of natural gas service they receive. Further, over seven-out-of-ten residential respondents reported satisfaction with the quality of electric (71.8%) and water (71.8%) service they receive for the rate they pay, and a similar frequency of commercial respondents (73.7%) reported satisfaction with the quality of wastewater service they receive for the rate 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")

	Residential	Commercial
Natural Gas	72.3%	78.9%
Electric	71.8%	68.4%
Water	71.8%	68.4%
Wastewater	64.6%	73.7%

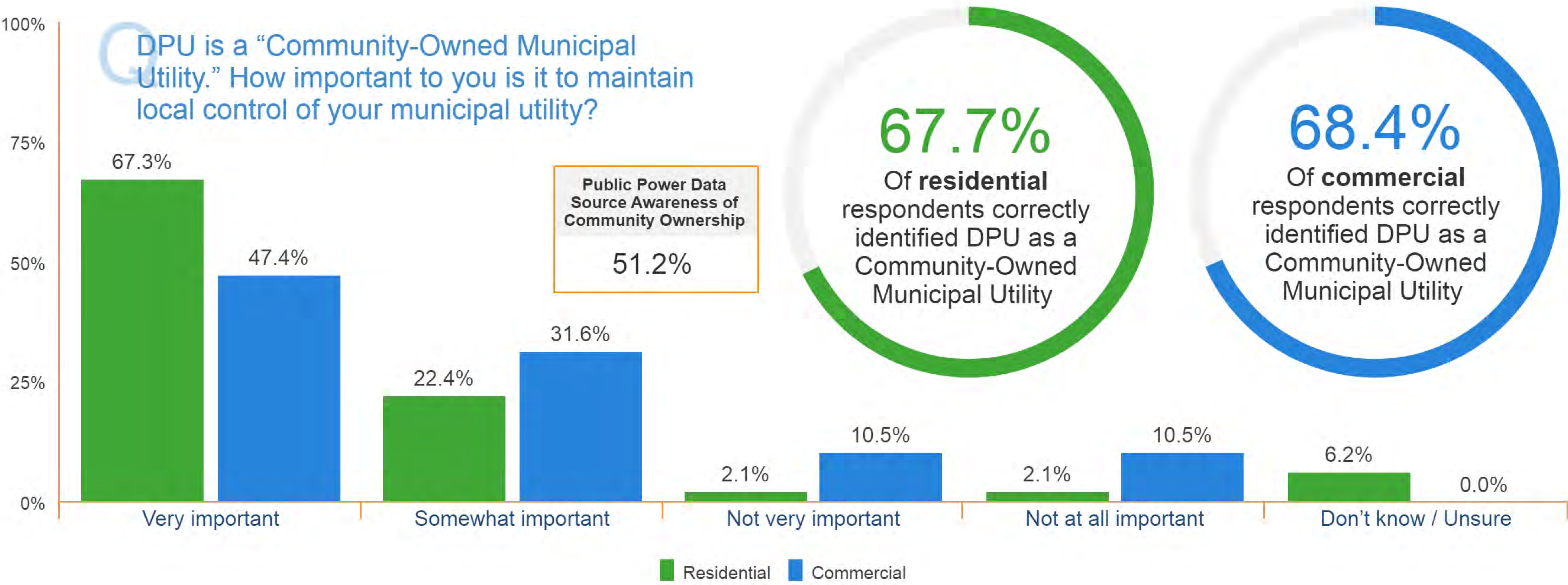
Majority of Customers are Satisfied with DPU

The DPU scored a net positive rating (satisfied + advocate) of 74.2% among residential respondents and 68.5% among commercial respondents. Of note, two-thirds of residential respondents (66.7%) and over three-fifths of commercial respondents (63.2%) reported being "a satisfied customer" of the DPU, while roughly one-fifth of both respondents (17.4% residential, 21.1% commercial) indicated they are "a less than satisfied customer."



Find Community Ownership Important

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



Prefer to Receive Information Through Email

Over two-fifths of residential respondents (44.9%) and over one-quarter of commercial respondents (26.3%) reported currently receiving information about DPU through "bill inserts." Nearly two-fifths of residential respondents (38.5%) and over one-quarter of commercial respondents (26.3%) reported a preference for receiving information about DPU through "email," while one-quarter of residential respondents (24.8%) indicated they would prefer to receive information about DPU through "bill inserts."

Please tell me how you **currently** receive information about DPU?

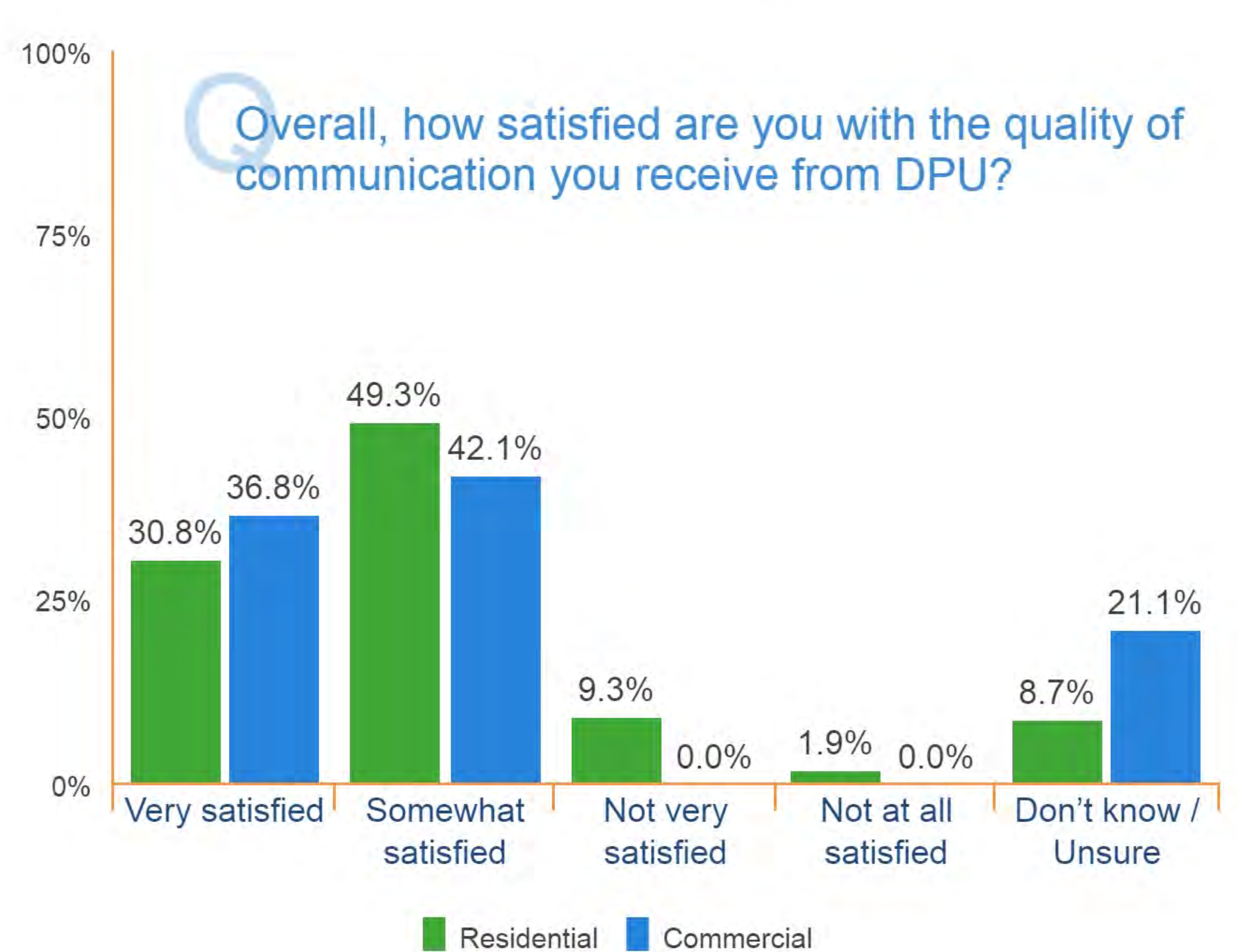
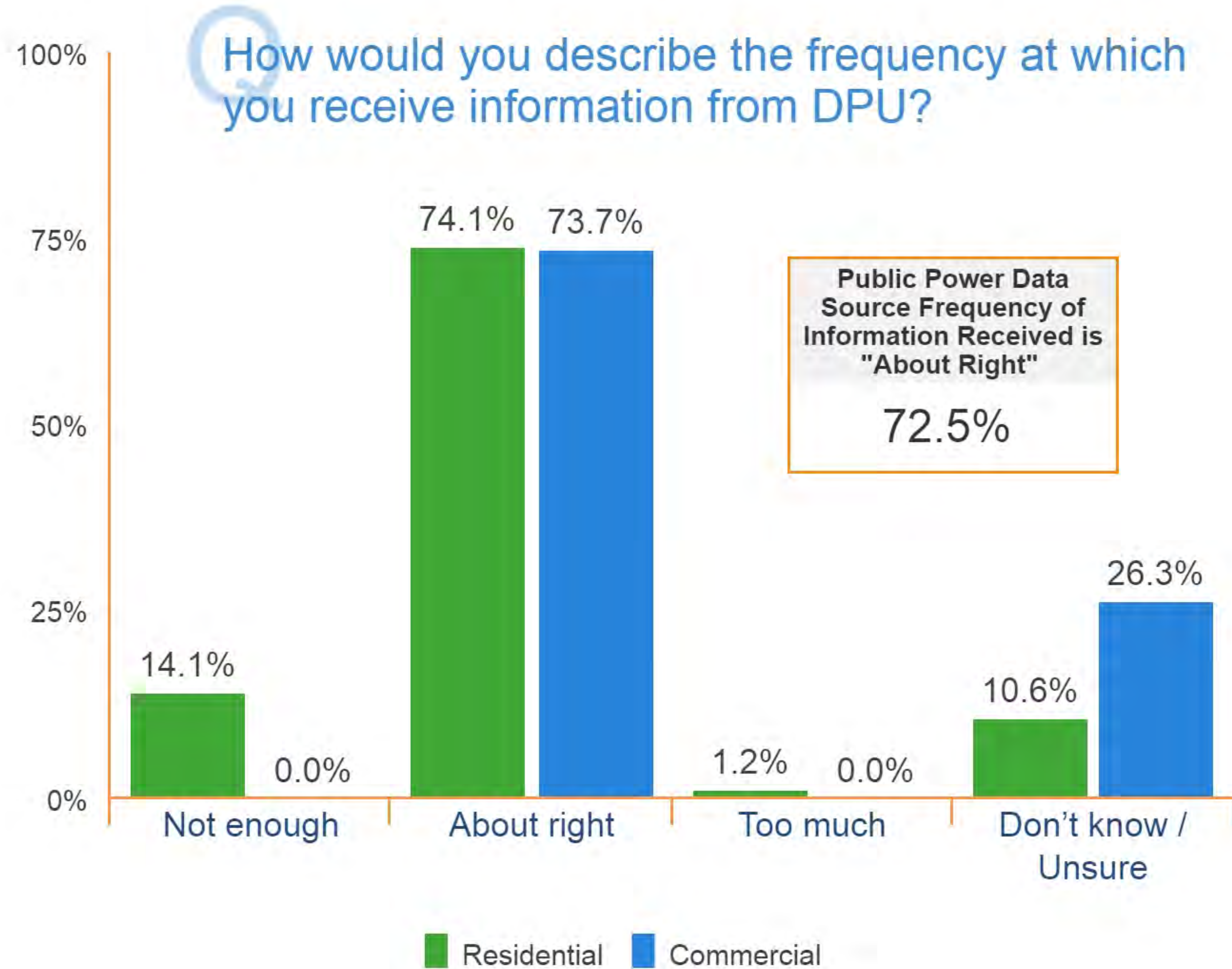
	Residential	Commercial
Bill inserts	44.9%	26.3%
Newspaper	25.1%	21.1%
Email	22.2%	26.3%
DPU website	20.9%	5.3%
Mail	19.0%	21.1%
Social Media (e g , Facebook, Twitter)	17.6%	0.0%
Brochures	9.7%	0.0%
Word of mouth	8.5%	5.3%
Don't look for information / don't care to receive information	6.4%	10.5%
Other	2.1%	0.0%

And, please tell me how you would **prefer** to receive information about DPU?

	Residential	Commercial
Email	38.5%	26.3%
Bill inserts	24.8%	15.8%
DPU website	9.7%	5.3%
Mail	8.9%	10.5%
N/A Don't look for information / don't care to receive information	5.6%	10.5%
Social Media (e g , Facebook, Twitter)	4.3%	5.3%
Newspaper	3.5%	15.8%
Multiple ways	2.5%	0.0%
Brochures	1.0%	5.3%
Other (please specify):	0.8%	5.3%
Word of mouth	0.2%	0.0%

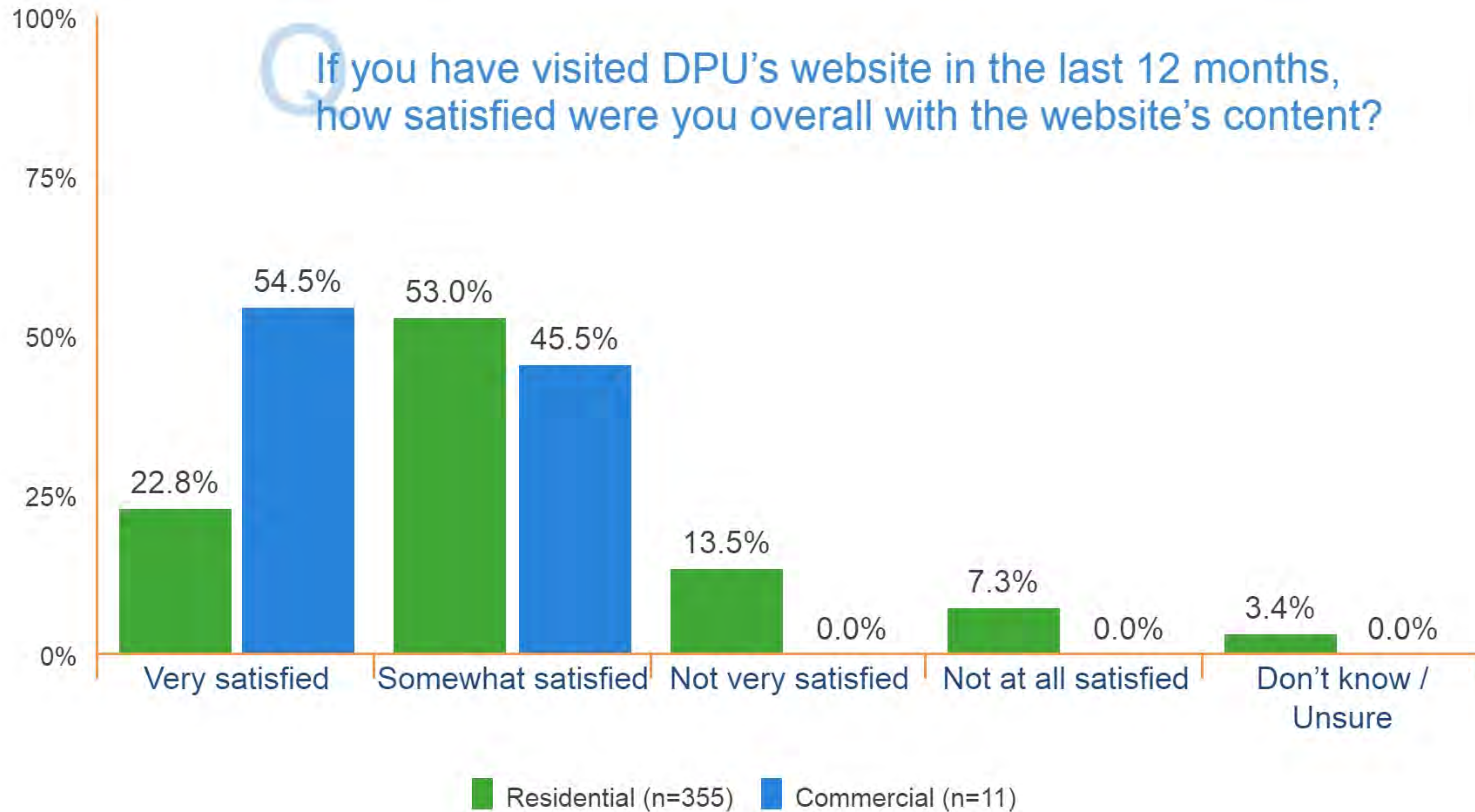
Satisfied with Quality of Communication Received

Nearly three-quarters of residential (74.1%) and commercial (73.7%) respondents indicated the frequency at which they receive information from DPU is "about right." Of note, 14.1% of residential respondents reported the frequency of receiving information is "not enough," while one-quarter of commercial respondents (26.3%) were unsure. Roughly four-fifths of respondents (80.1% residential, 78.9% commercial) reported satisfaction with the quality of communication they receive from DPU.



Satisfied with Website's Content

Among those respondents who had visited DPU's website in the last 12 months, three-quarters of residential respondents (75.8%) and all commercial respondents reported they were "very satisfied" or "somewhat satisfied" with the website's content. Those residential respondents who reported being dissatisfied with the website's content indicated this is because the "website is difficult to use / not user friendly" (35.1%), the "information not easily accessible" (20.3%) and it is "difficult to make payment" (18.9%).

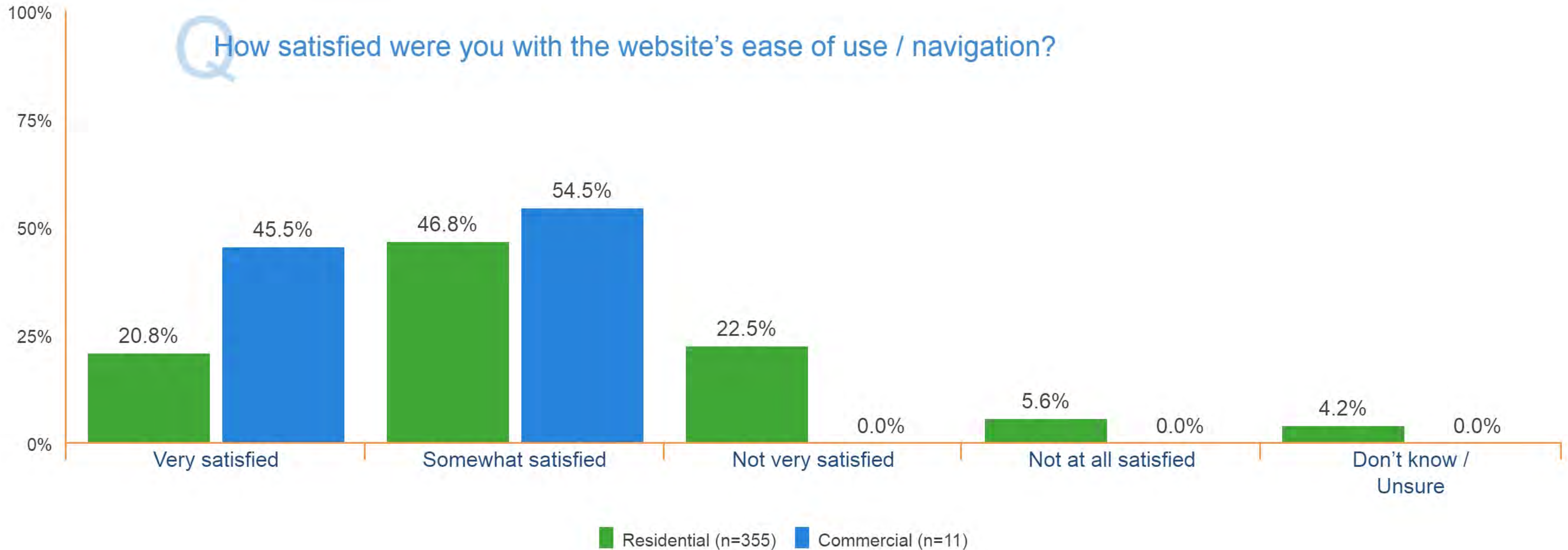


Q For what reasons were you dissatisfied with the website's content?

	Residential
Sample size	74
Website is difficult to use / not user friendly	35.1%
Information not easily accessible	20.3%
Difficult to make payment	18.9%
Website doesn't provide updates	8.1%
Overall update of technology needed	6.8%
Online billing needs updating / streamlining	5.4%
Other	5.4%

Majority Find Website Easy to Use

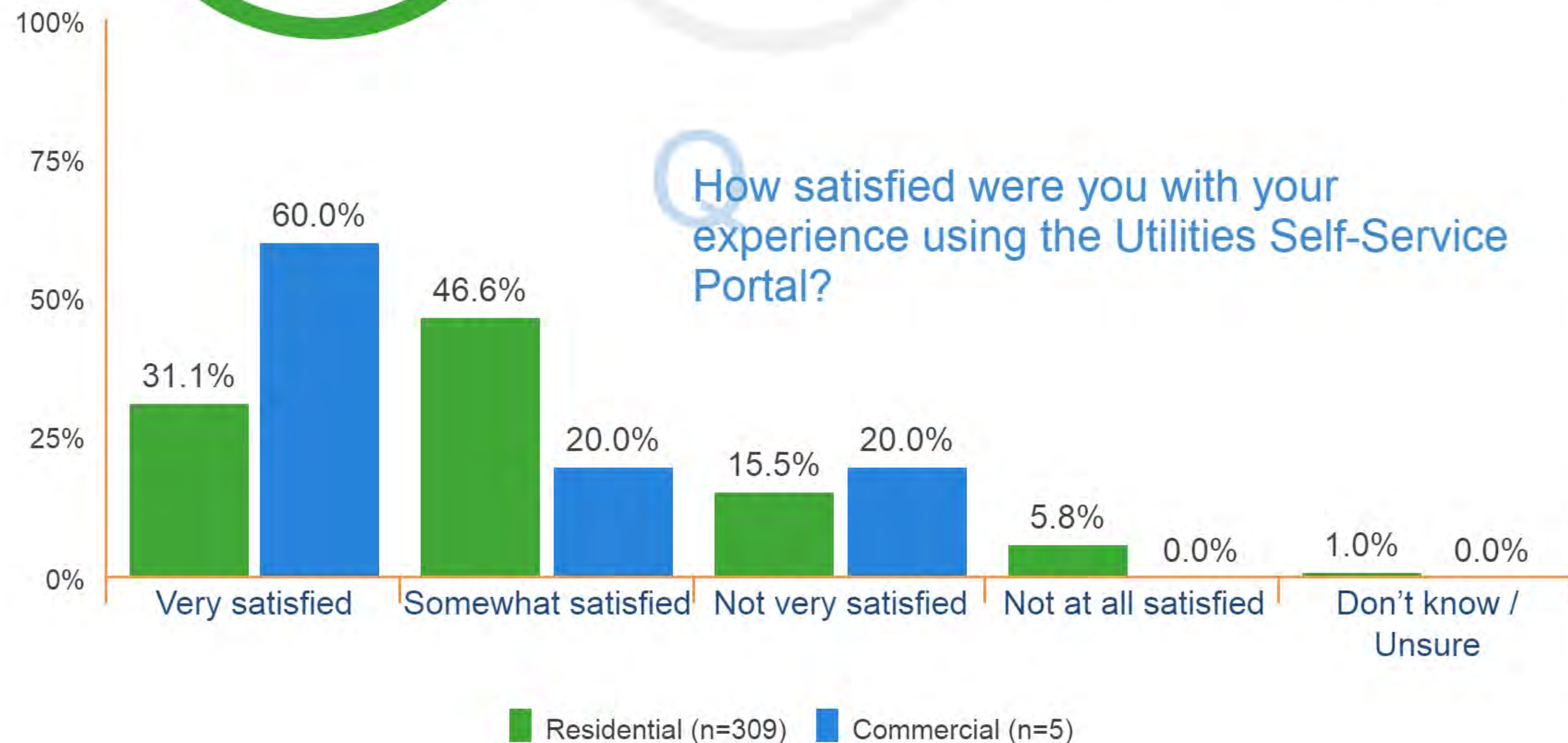
Over two-thirds of residential respondents (67.6%) and all commercial respondents who have used the DPU's website in the past 12 months, reported they were "very satisfied" or "somewhat satisfied" with the website's ease of use and navigation.



Stronger Use of Self-Service Portal Among Residents



Nearly two-thirds of residents (64.0%) and over one-quarter of businesses (26.3%) reported using the Utilities Self-Service Portal. Among those respondents, roughly four-fifths (77.7% residential, 80.0% commercial) reported being satisfied with their experience using the portal. Those who reported being dissatisfied with the portal indicated this is because it was "difficult to make payment" (34.8% residential, 100.0% commercial), "difficult to use / not user friendly" (25.8% residential) or "antiquated / clunky / non-functional" (12.1%).



For what reasons are you dissatisfied with the Utilities Self-Service Portal? (Top 6 values shown)

	Residential	Commercial
Difficult to make payment	34.8%	100.0%
Difficult to use / not user friendly	25.8%	0.0%
Antiquated / clunky / non functional	12.1%	0.0%
Doesn't save payment information	9.1%	0.0%
Other	9.1%	0.0%
Poor user interface / design	4.5%	0.0%

Unsure of DPU Maintaining Organizational Citizenship

Over one-half of residential respondents (55.0%) and nearly three-fifths of commercial respondents (57.9%) reported being either "very satisfied" or "somewhat satisfied" with DPU's efforts to maintain organizational citizenship in the community. Of note, roughly one-third of respondents (36.0% residential, 31.6% commercial) reported being unsure.



Organizational citizenship is defined as how DPU responsibly manages not only its financial performance, but also the environmental and social impacts it has as a community partner in the area.

How satisfied are you with DPU's efforts to maintain organizational citizenship in the community?

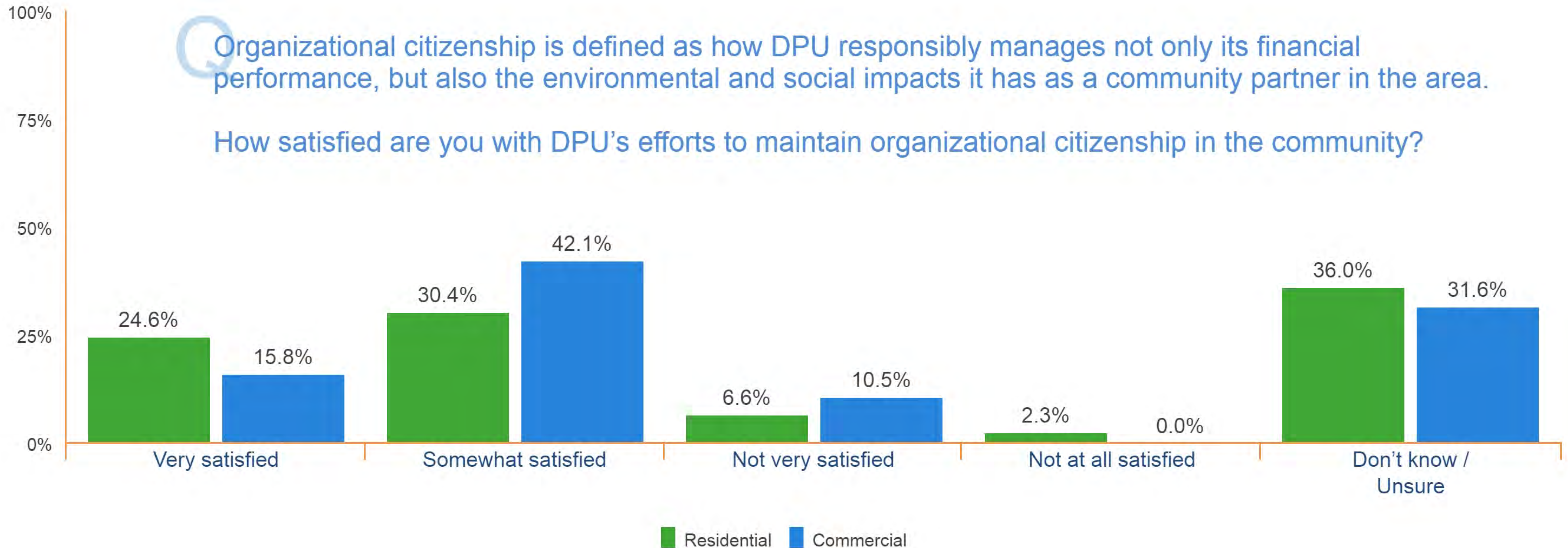


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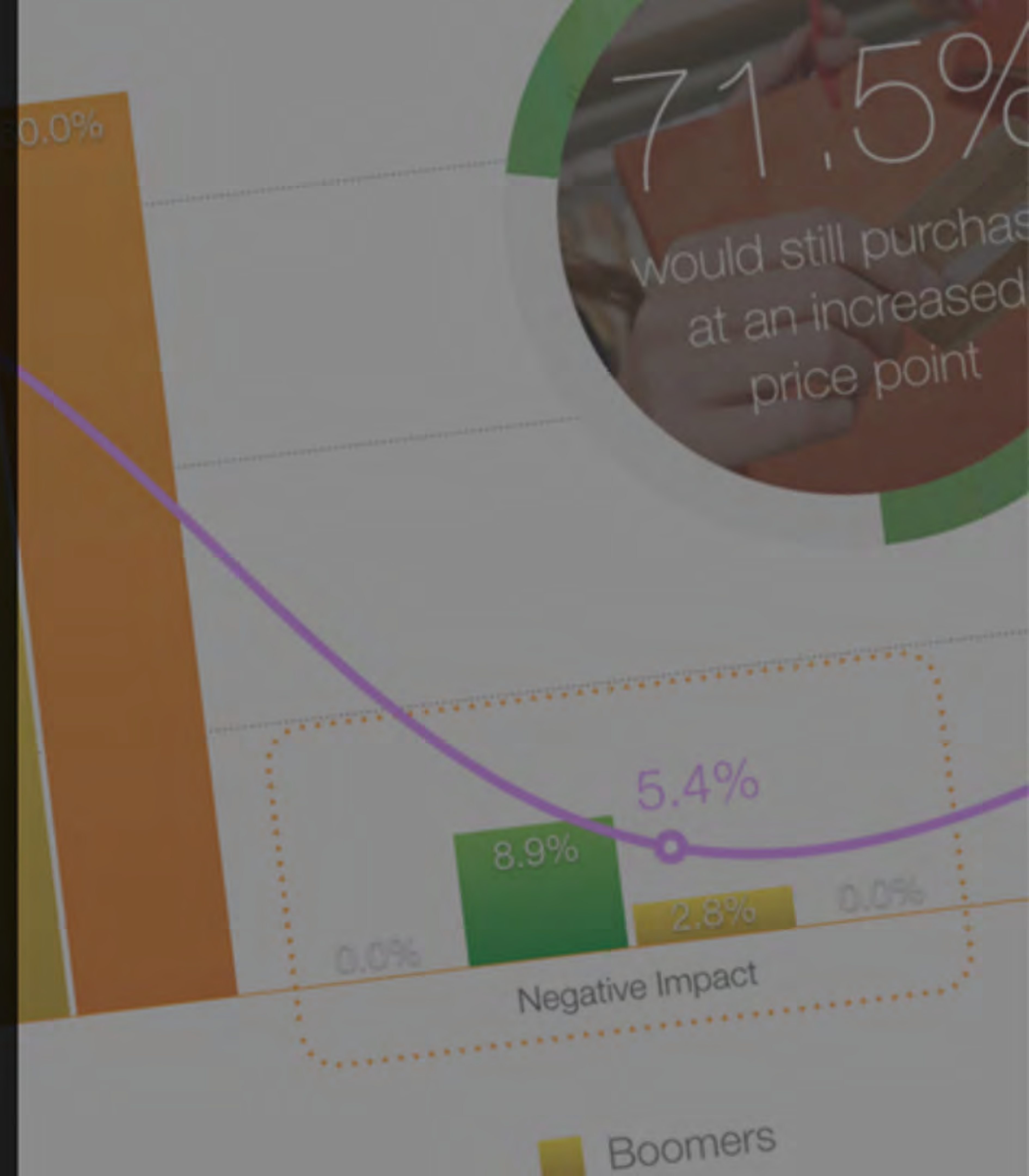
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Considerations

- **Focus on improving first contact resolution.** Roughly one-half of residential and commercial respondents indicated that when they contact DPU, their questions or issues are "taken care of the first time" as opposed to needing to contact the customer service department multiple times before their issue is resolved. The rate at which DPU's customer service department takes care of issues the first time a customer contacts them is lower than the national Public Power Data Source average. A utility's rate of first contact resolution often has an impact on customers' satisfaction with the customer service department, as well as their satisfaction with the utility as a whole. Knowing this, it is recommended that the DPU prioritize improvements to the ability of its customer service personnel to address and resolve customers' concerns and questions upon their first point of contact with the department. This may be done through examining the training process of customer service personnel and resources available to this department to determine any areas for improvement that may increase their efficiency and overall ability to address customers' needs.
- **Improve website's ease of use and navigation.** Three-quarters of residents and all businesses who have visited DPU's website in the past year reported satisfaction with the website's content. However, of those who were dissatisfied with the website's content, the majority reported the website is difficult to use and information is not easily accessible. In order to determine ways to improve the ease of using their website, DPU may consider conducting a user experience (UX) test. In a UX test, participants are asked to navigate a series of task flows on the website to mimic a customer's common experience interacting with the site and evaluate the ease of finding and performing certain tasks. Through this test, DPU may be able to determine areas of the website customers are finding difficult to navigate and any information customers are not able to find quickly, to ascertain parts of the website in need of improvement.

Considerations

- **Provide conservation tips to customers.** When respondents rated the DPU on a series of organizational characteristics, respondents provided the lowest ratings for the DPU "helping customers conserve electricity, gas and water." Further, when asked reasons for providing low ratings for any organizational characteristics, numerous respondents reported the "cost / too expensive," while some residential respondents reported DPU "needs to provide conservation tips." In order to increase ratings for "helping customers conserve electricity, gas and water" and consequently the average positive ratings for organizational characteristics moving forward, it is recommended that the DPU improve and increase their communication to customers about ways they can conserve electricity, water and gas at their home or business. This information should be communicated to customers through a mix of emails and bill inserts, as respondents reported these being two of the more preferred methods of receiving information from the DPU. Detailing to customers ways they can conserve resources, along with cost savings they could experience by making these changes in their routine, may help customers ultimately save money and resources, and help improve the perception that the DPU is helping customers conserve electricity, gas and water.

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