



Voice of Customer Study 2025



Report of Findings

20 March 2025
Confidential & Proprietary

Table of Contents

SECTION ONE

About GreatBlue

SECTION TWO

Project Overview

SECTION THREE

Key Study Findings

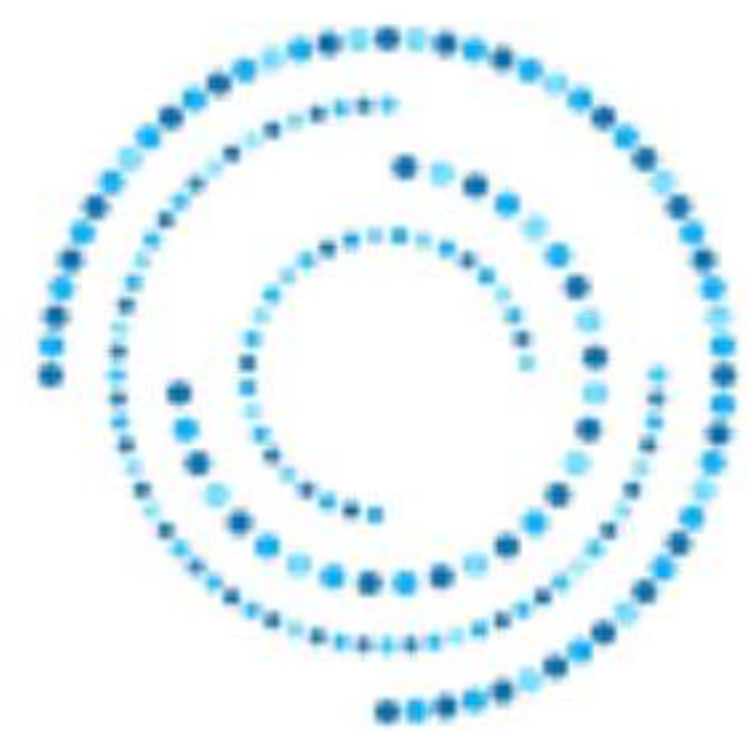
SECTION FOUR

Considerations

SECTION FIVE

Aggregate Data (Provided Separately)





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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 and 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
- Awareness, use, and satisfaction with the Los Alamos Now application.
- Support for the DPU investing in clean energy and willingness to pay extra for investments
- Demographic and firmographic profiles of respondents



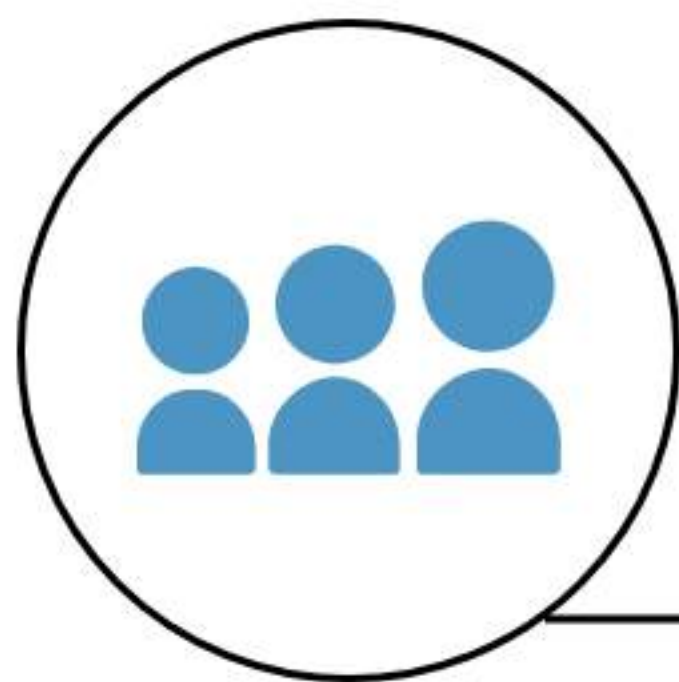
Research Methodology Snapshot

Residential

Methodology Digital	No. of Completes 274	No. of Questions 53*	Incentive None	Sample Customer List
Target Residential Customers	Quality Assurance Dual-level**	Margin of Error +/- 5.7%	Confidence Level 95%	Research Dates January 13 - February 24, 2025

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

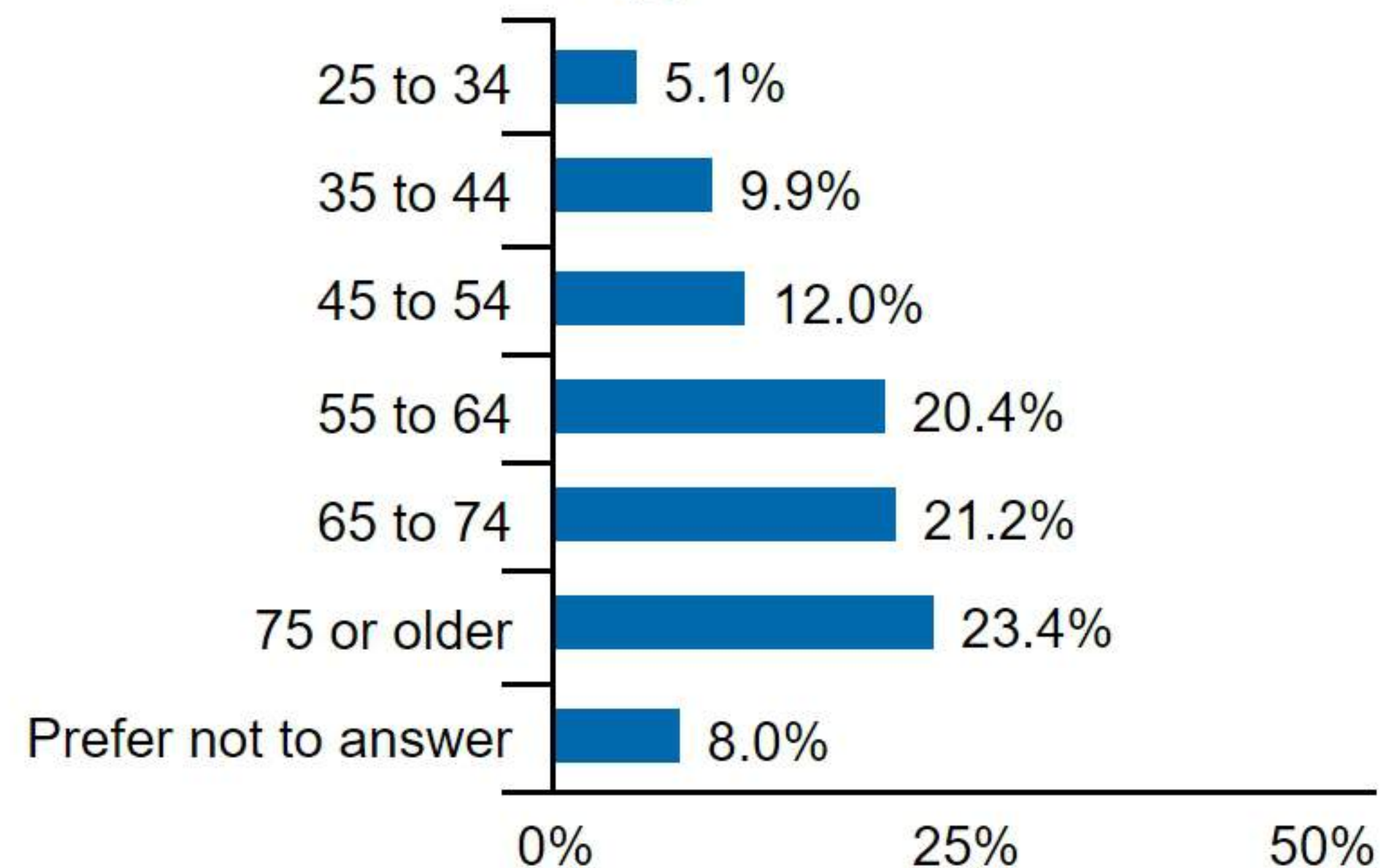
** Data Quality personnel, in addition to computer-aided web interviewing platforms, ensure the integrity of the data is accurate.



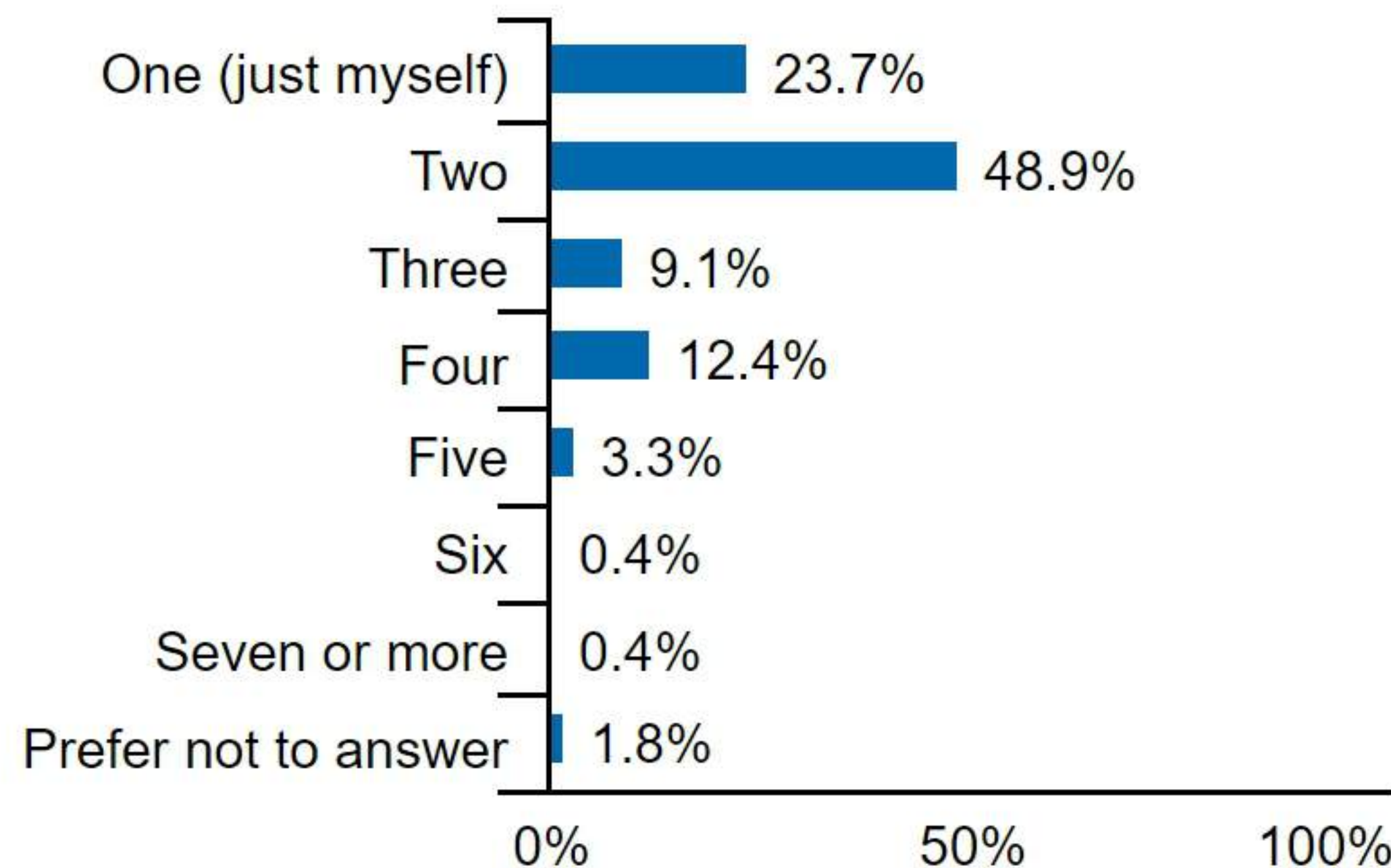
Respondent Snapshot



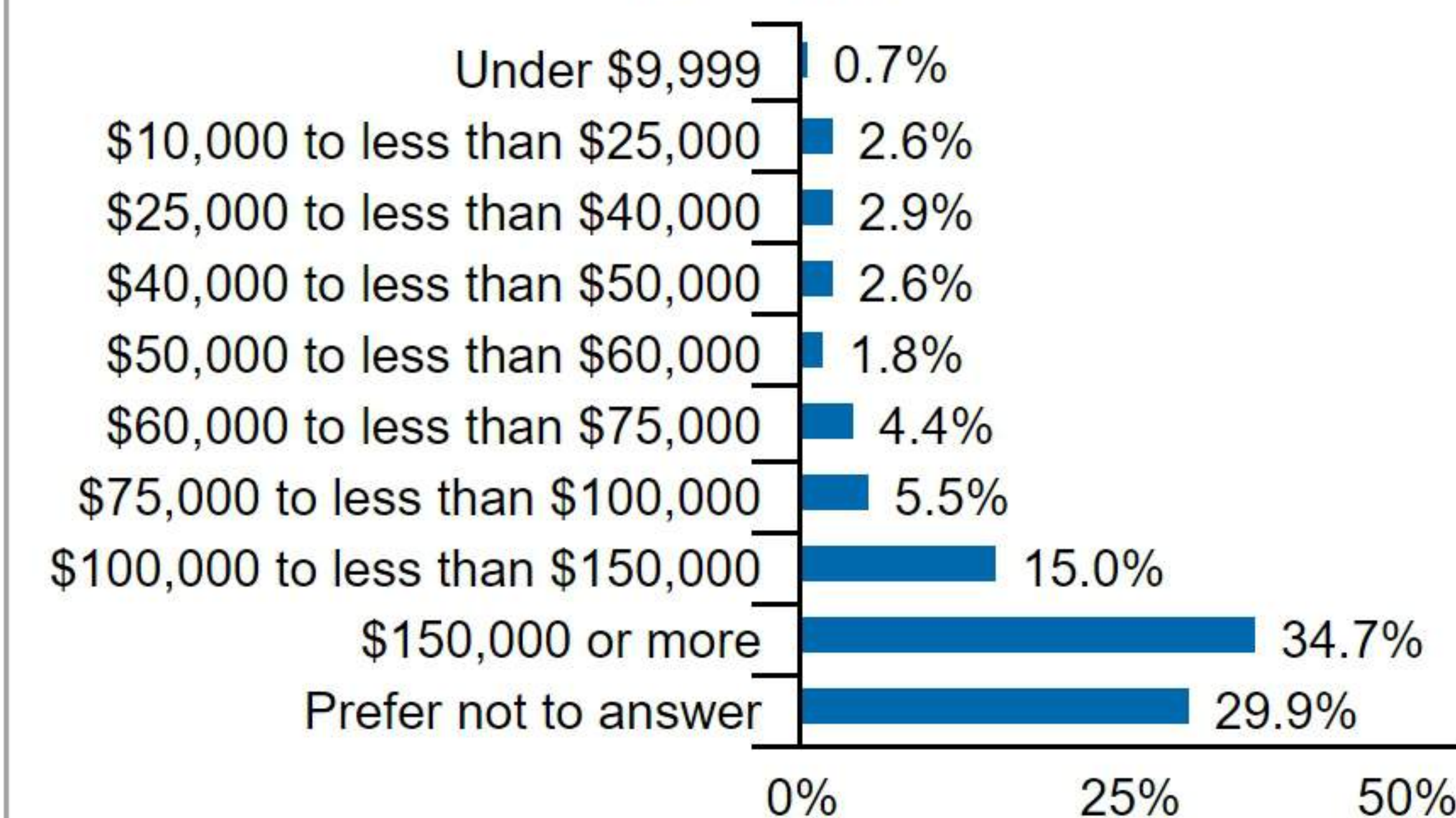
Age



Household Size



Income

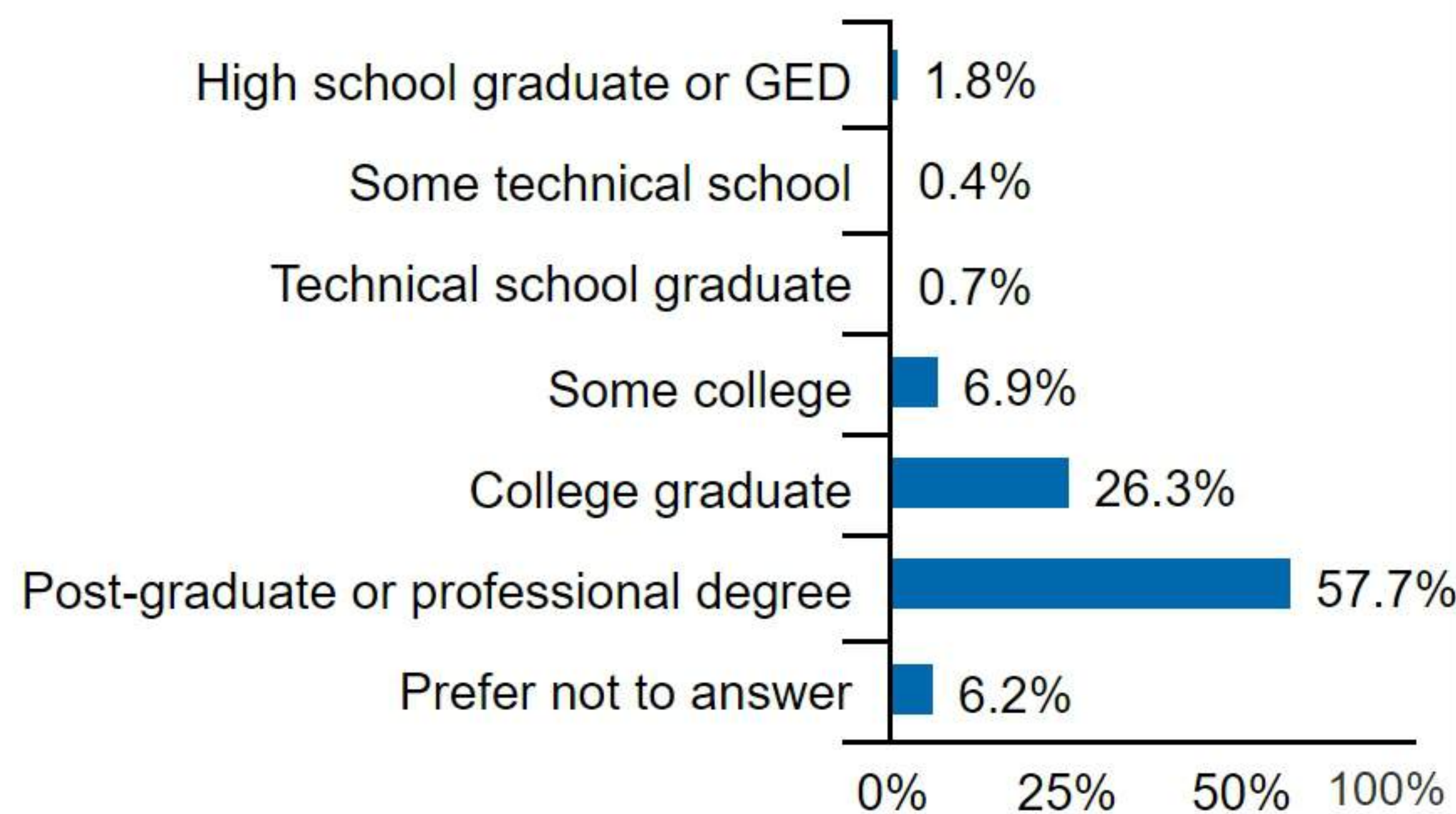


Rent vs. Own

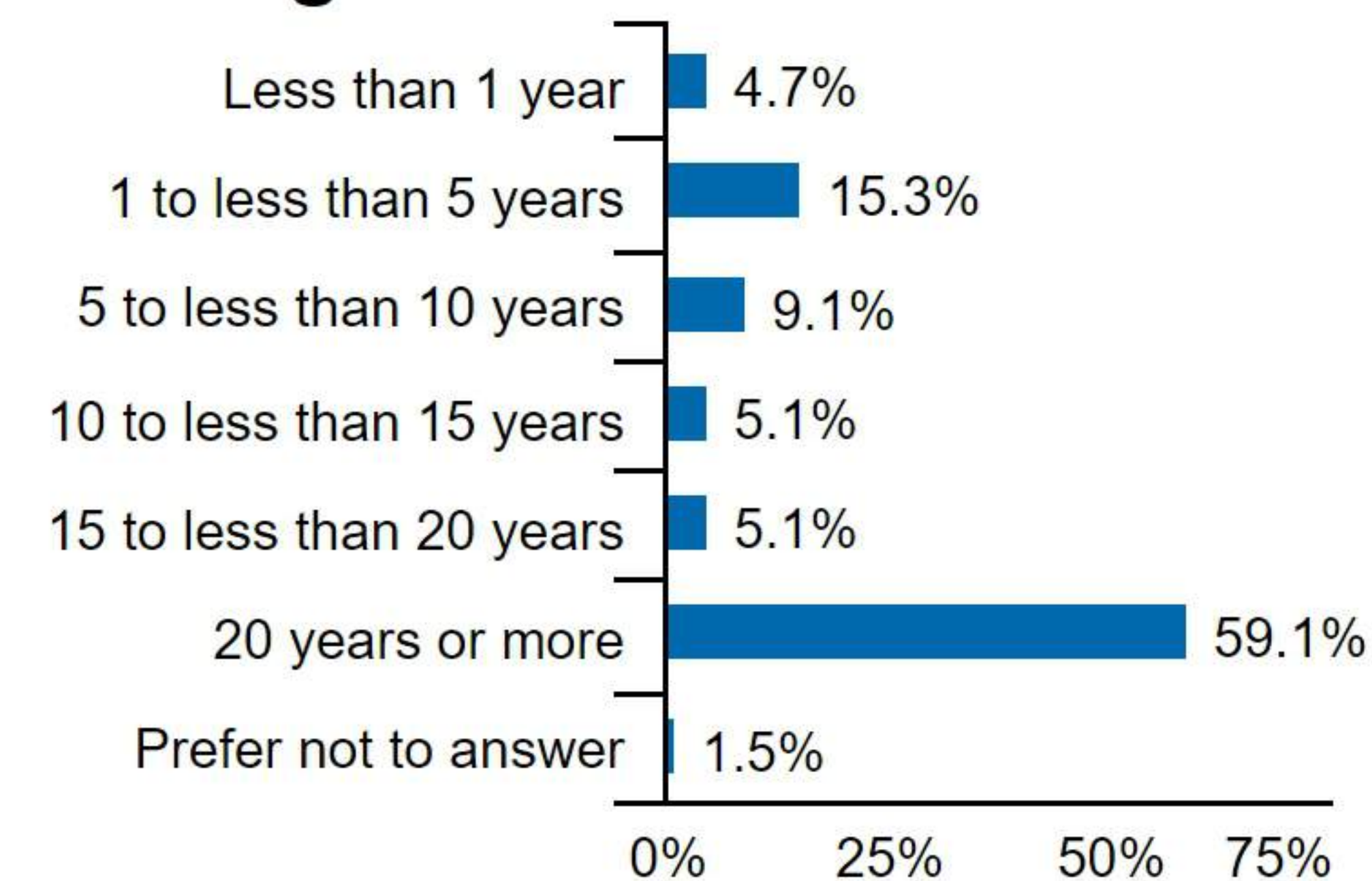
87.2% / 10.9%
Own Rent

1.8% of respondents provided responses of "prefer not to answer"

Education



Length of Time as Customer





Research Methodology Snapshot

Commercial

Methodology Digital & Telephone	No. of Completes 21	No. of Questions 47*	Incentive None	Sample Customer List
Target Commercial Customers	Quality Assurance Dual-level**	Margin of Error +/- 20.0%	Confidence Level 95%	Research Dates January 13 - February 24, 2025

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

** Data Quality personnel, in addition to computer-aided web interviewing platforms, ensure the integrity of the data is accurate.

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.*

Table of Contents

SECTION ONE
About GreatBlue

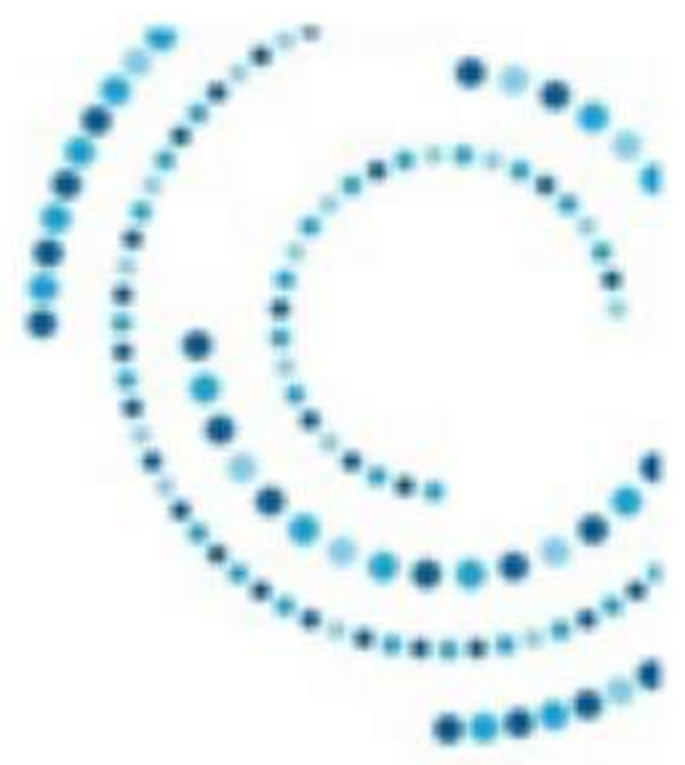
SECTION TWO
Project Overview

SECTION THREE
Key Study Findings

SECTION FOUR
Considerations

SECTION FIVE
Aggregate Data (Provided Separately)

Key Study Findings



Ratings

- In 2025, when rating the DPU on a series of organizational characteristics, residential customers reported an average positive rating of 72.8%, while commercial customers reported an average rating of 70.8%.
- Nine-out-of-ten residential customers reported being satisfied with the overall quality of services received from the DPU in 2025.
- All surveyed commercial customers (100.0%) reported being satisfied with the quality of natural gas and wastewater services, marking increases from 2024 (+5.4 and +8.8 percentage points, respectively).
- The net positive rating (satisfied customers + advocates) among residential customers increased to 79.9% (from 77.8% in 2024), while the NP+S among commercial customers decreased to 85.7% (from 90.0%).
- Satisfaction with customer service increased for both residential (86.9%, +5.4 percentage points) and commercial customers (80.0%, +6.9 percentage points).
- The percentage of commercial customers whose issues were resolved on the first contact increased to 66.7% (+9.0 percentage points).



Communications

- A majority of residential (88.0%) and commercial customers (95.2%) reported being satisfied with the quality of the DPU's communications.
- Most residential (83.2%) and commercial customers (85.7%) reported that the frequency of communication from the DPU is "about right."
- The most common methods of receiving information among residential customers were bill inserts (65.0%) and email (43.8%), while nearly two-fifths (39.1%) preferred email for receiving information about the DPU.
- Among commercial customers, the most common method of receiving information was mail (42.9%), but nearly one-half (47.6%) preferred email.
- Over one-third of residential customers (36.1%) and three-fifths of commercial customers (61.9%) were aware of the Los Alamos Now app. Among app users, 76.9% of residential and 100.0% of commercial customers reported being satisfied with their experience.



Energy Initiatives

- Two-thirds of residential customers (66.8%) and nine-out-of-ten of commercial customers (90.5%) reported that reducing carbon emissions in the electric portfolio of the DPU is important.
- More residents 55 years of age or older support reducing carbon emissions compared to younger customers (+12.7 percentage points).
- Over three-fifths of residential customers (62.4%) and over three-quarters of commercial customers (76.2%) supported the DPU investing in clean energy even if it raised their electric bill. However, roughly one-third of residential (32.8%) and commercial customers (33.3%) would not be willing to pay more per month.
- Over one-half of residential customers (55.8%) and over three-quarters of commercial customers (76.2%) supported the DPU accelerating its carbon reduction goals, even if it meant increased electric bills.

Satisfaction with Services



Satisfaction | Organizational Characteristics

When rating the DPU on a series of organizational characteristics in 2025, both residential and commercial customers provided consistent average positive ratings compared to 2024. Residential customers gave higher ratings for the DPU "providing good service and value for the cost of service" (+3.7 percentage points). However, residential customers reported lower ratings for "communicating with customers" (-3.7 percentage points). Commercial customers provided higher ratings for their "overall satisfaction with [the] DPU" (+8.8 percentage points), but lower ratings for "helping customers conserve electricity, gas, and water" (-13.6 percentage points).

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

	Commercial		Residential		Public Power Data Source*
	2024	2025	2024	2025	2024
Communicating with customers	75.0%	75.0%	80.4%	76.7%	66.8%
Helpful and knowledgeable staff	72.2%	80.0%	80.3%	82.0%	70.0%
Responding promptly to customer questions and complaints	73.5%	73.7%	79.7%	78.7%	68.4%
Overall satisfaction with DPU	76.9%	85.7%	75.7%	76.8%	72.3%
Community outreach	68.8%	61.1%	71.0%	71.0%	63.9%
Providing good service and value for the cost of the service	69.4%	76.2%	66.5%	70.2%	65.7%
Being transparent about company operations and policies	74.3%	65.0%	66.2%	63.6%	65.4%
Helping customers conserve electricity, gas, and water	63.6%	50.0%	64.8%	63.7%	59.2%
Average	71.7%	70.8%	73.1%	72.8%	66.5%

Q:Please rate the DPU on the following organizational characteristics using a 10-point scale where one is very poor and ten is very good.

*The Public Power Data Source is a residential customer satisfaction benchmarking tool

Satisfaction | Reasons for Dissatisfaction

The top reasons for providing poor ratings for the DPU for any company characteristic among residential customers were the "cost / too expensive" and "poor communication / lack of information / not responsive."

Among commercial customers, top reasons cited were "poor customer service / support" and "billing issues" by over one-quarter of customers.

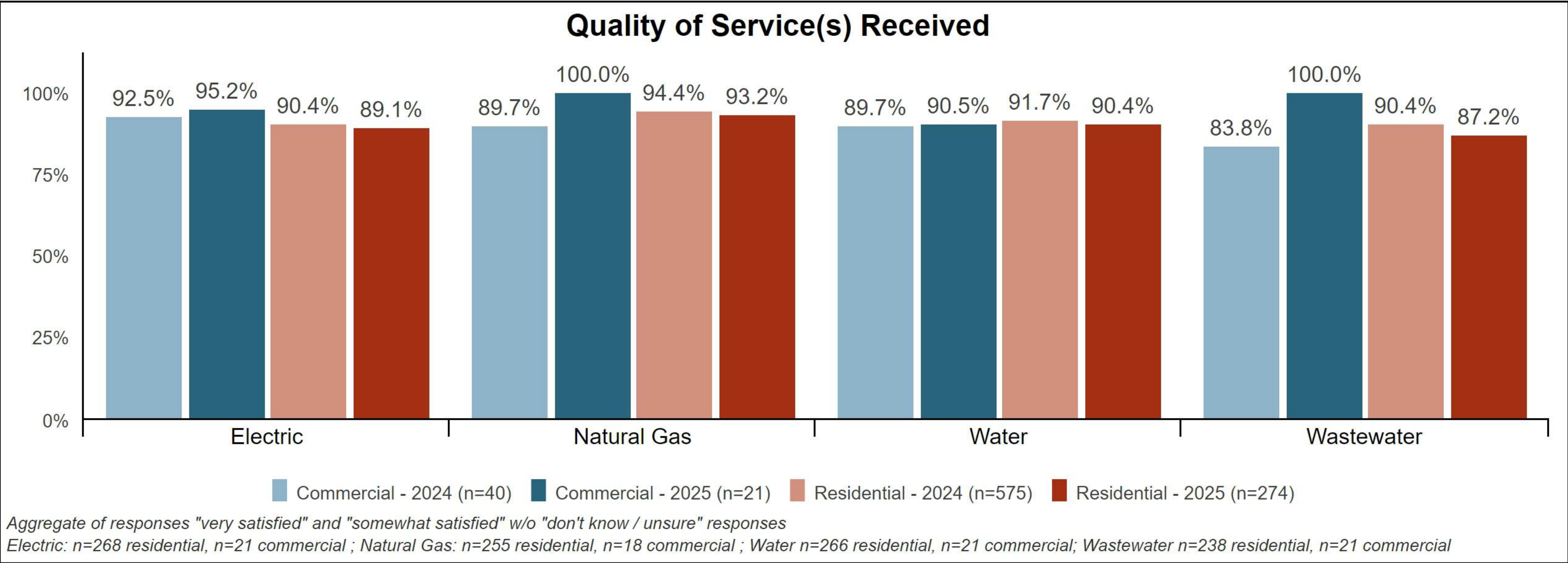
Reasons for Poor Rating	2025	
	Commercial	Residential
Sample size	7	72
Cost / too expensive	0	18
Poor communication / lack of information / not responsive	1	13
Provide more renewable energy options	0	8
Billing issues	2	7
Poor customer service / support	2	6
Need to provide conservation tips	0	3
Technology needs improvement (website, phone app, etc.)	0	2
Grid / infrastructure needs updating	0	2
Water issues (usage, leaks, meters, etc.)	0	1
New customer / too soon to tell	0	1

Top 10 residential responses shown

Q:Please indicate why you provided a poor rating for DPU?

Satisfaction | Quality of Services Received

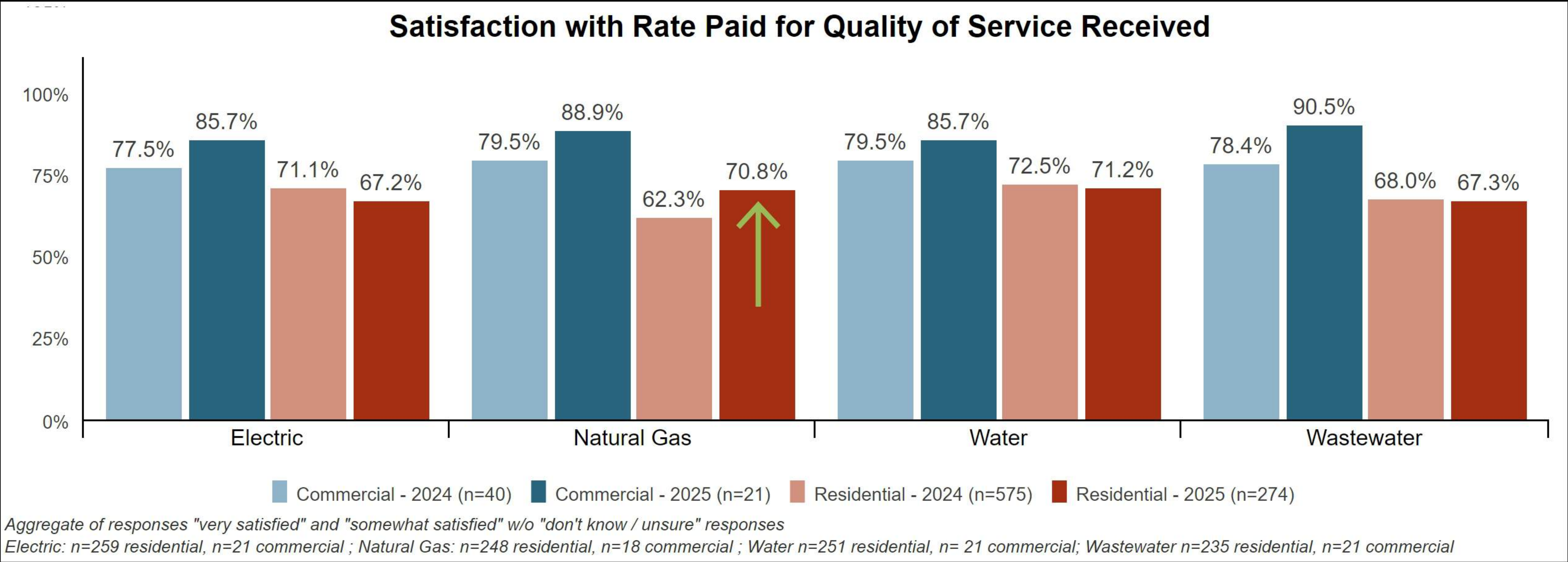
In 2025, more than nine-out-of-ten surveyed residential and commercial customers were satisfied with the **quality** of all services received from the DPU. Residential customers reported slightly lower satisfaction ratings for the quality of water and electric services compared to 2024 (-2.3 and -2.2 percentage points, respectively). Notably, all surveyed commercial customers reported being satisfied with the quality of natural gas and wastewater services they received from the DPU, showing an increase from 2024 (+5.4 and +8.8 percentage points, respectively).



Q:How satisfied are you with the quality of the service(s) you receive from DPU? Quality is a measure of what is involved in receiving a utility service. It includes safety, maintenance, utility system infrastructure and customer service.

Satisfaction | Price Paid for Quality Received

A significantly higher percentage of residential customers reported being satisfied with the **price they paid** for the quality of natural gas service they received from the DPU (+9.4 percentage points). Satisfaction with the price paid for the quality of the DPU's water and wastewater services remained consistent, while satisfaction with the price paid for the electric service quality received was slightly lower among residential customers (-3.4 percentage points). Notably, a slightly higher percentage of commercial customers reported being satisfied with the price paid for the quality of all services received from the DPU.

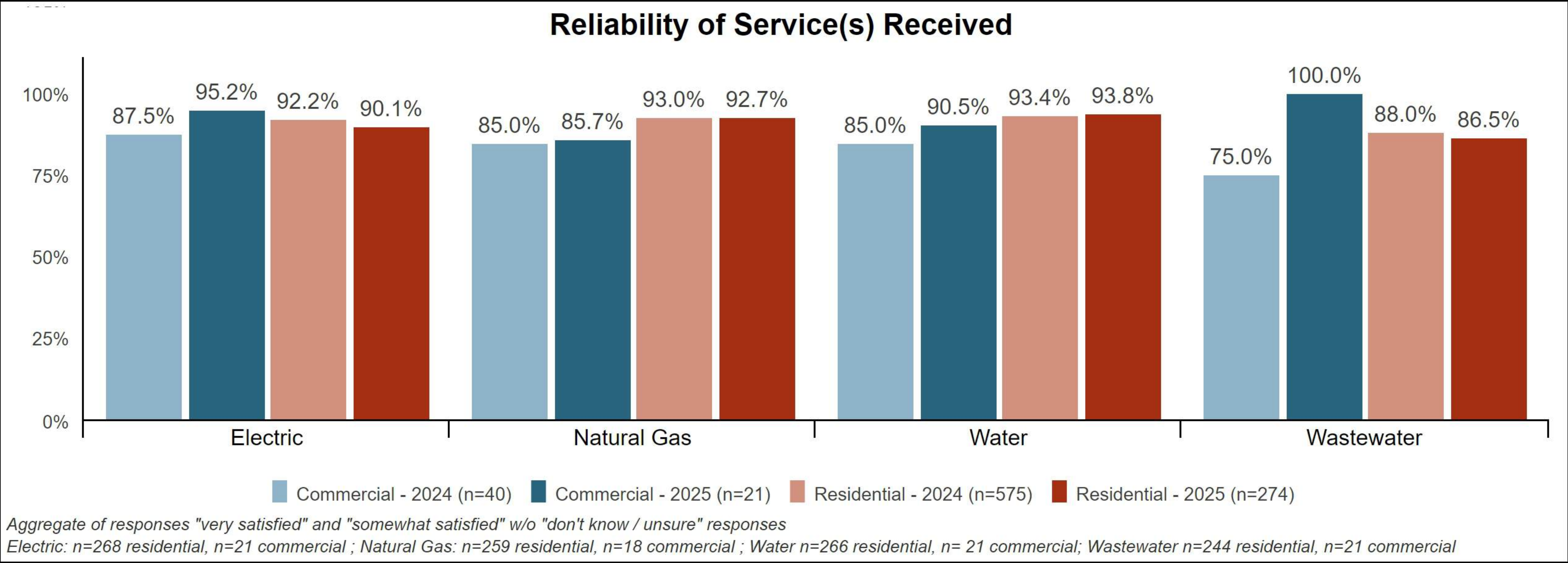


Q: How satisfied are you with the rate you pay for the quality of service you receive for each of the four (4) services DPU provides?

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

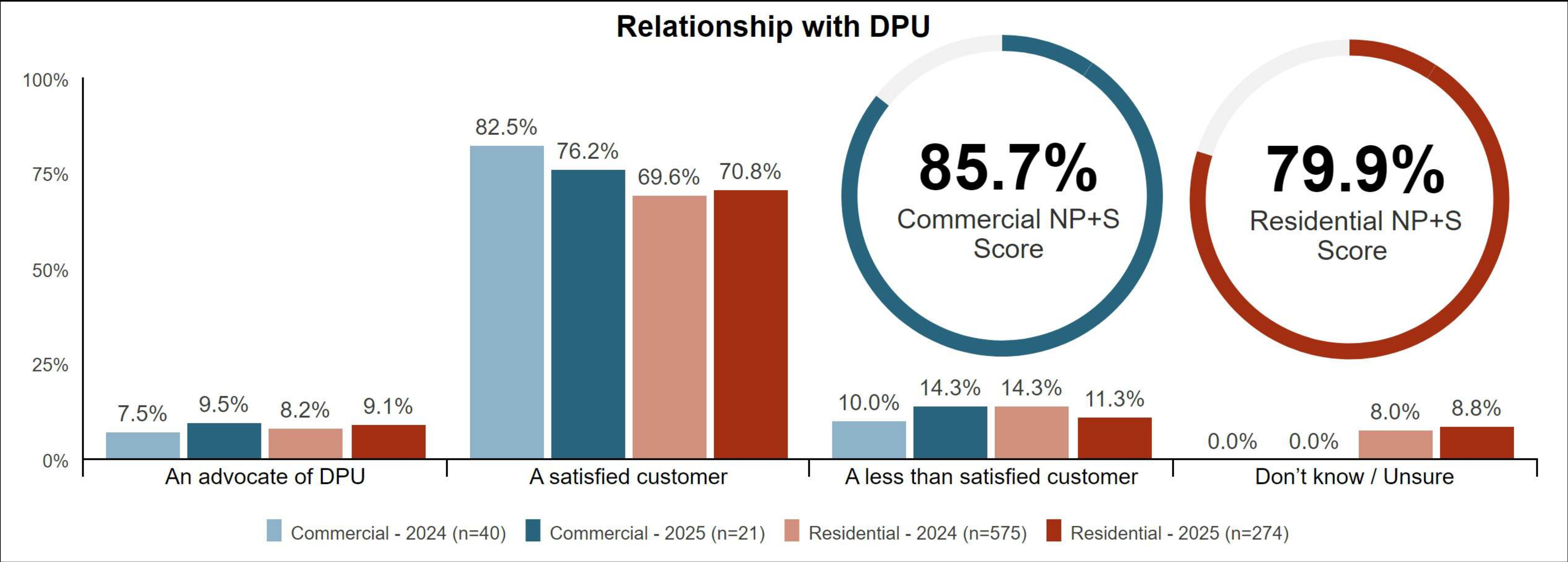
Residential customers reported consistent satisfaction with the **reliability** of each service they received in 2025 compared to the previous year, with more than nine-out-of-ten surveyed residential customers being satisfied with the reliability of each of the DPU's services. Similar to commercial customers' ratings of the quality of natural gas and wastewater services, all commercial customers reported being satisfied with the reliability of these two services, also reflecting an increase from 2024 ratings (+10.5 and +11.8 percentage points, respectively).



Q:Please indicate how satisfied you are with the reliability of the service(s) you receive from DPU.

Satisfaction | NP+S Score

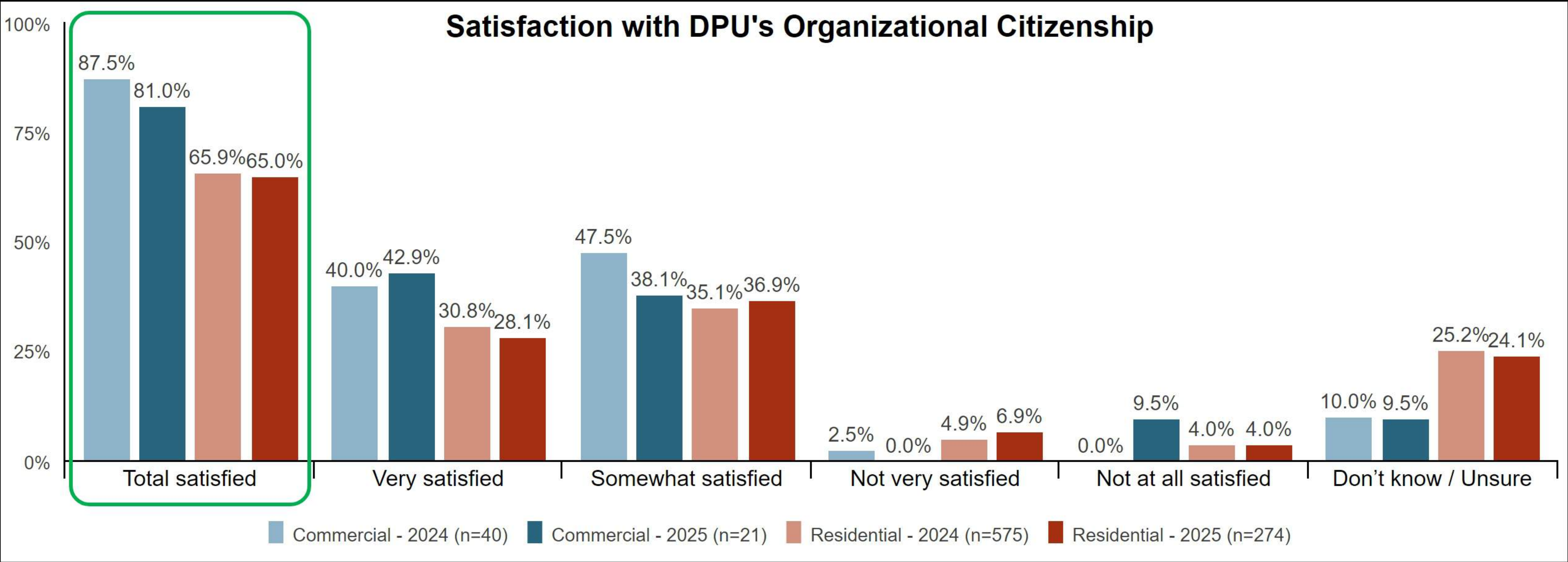
The DPU scored a slightly higher net positive rating (satisfied customers + advocate) among residential customers (79.9% over 77.8% in 2024), while commercial customers provided a slightly lower net positive rating (85.7% from 90.0% in 2024), which was largely due to more commercial customers self-reporting as "a less than satisfied customer" in 2025 compared to 2024 (+4.3 percentage points).



Q: Which of the following best describes your relationship with DPU?

Satisfaction | Organizational Citizenship

Nearly two-thirds of residential customers (65.0%) and eight-out-of-ten commercial customers (81.0%) reported being either "very satisfied" or "somewhat satisfied" with the DPU's organizational citizenship, marking a decrease in satisfaction among commercial customers (-6.5 percentage points). Notably, nearly one-quarter of residential customers were "unsure" how to rate the DPU's organizational citizenship, which was consistent with 2024 and may reflect an opportunity to promote the DPU's efforts in these areas.



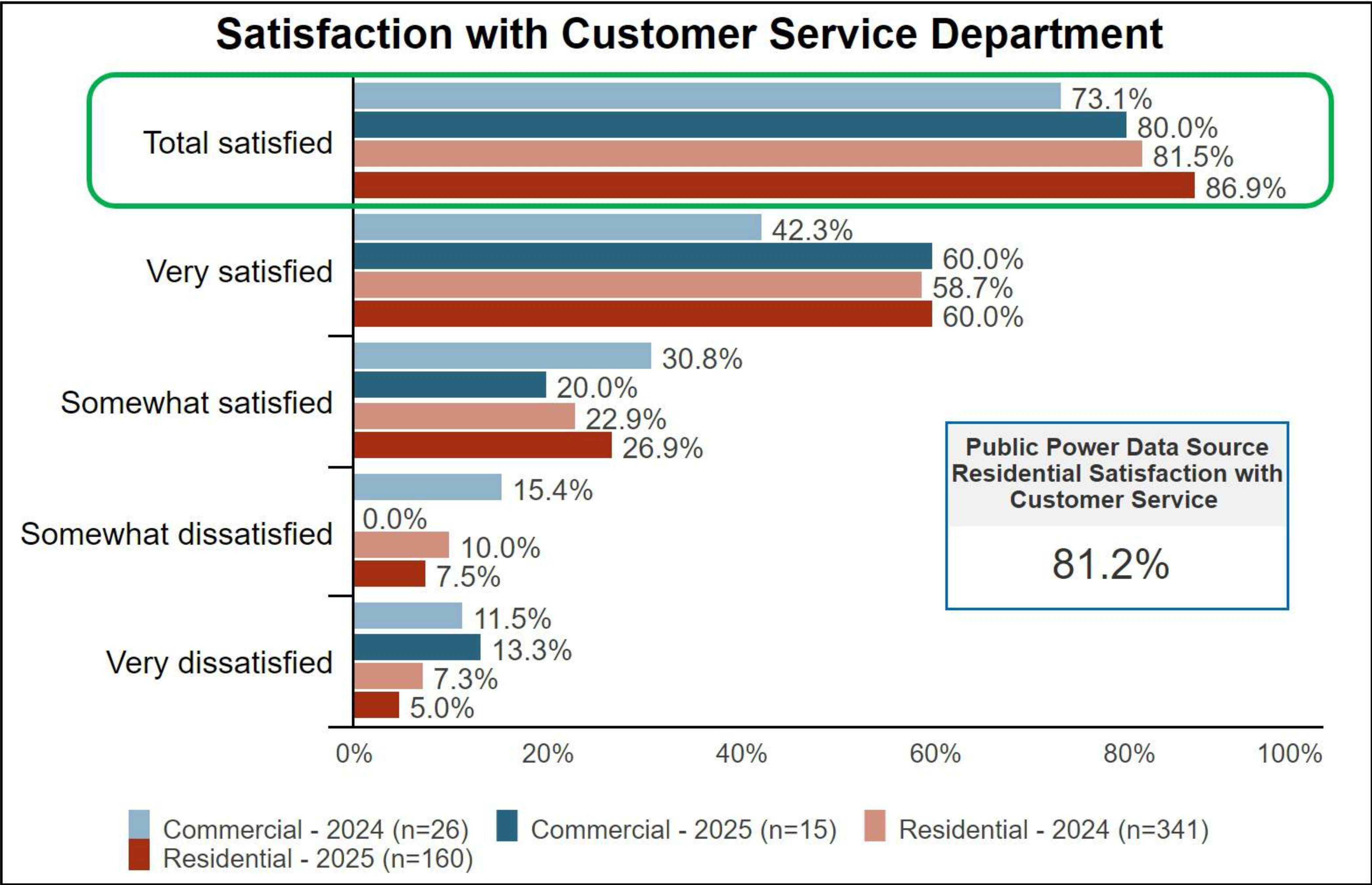
Q: How satisfied are you with DPU's organizational citizenship? In other words, how satisfied are you that DPU is environmentally, socially, and financially responsible?

Customer Service



Customer Service | Satisfaction and Purpose of Contact

Customer service satisfaction ratings increased in 2025, with at least eight-out-of-ten surveyed residential and commercial customers being satisfied with the service provided by the customer service department (+5.4 and +6.9 percentage points, respectively). Among residential customers who have contacted the DPU in the last 12 months, this was primarily for a "billing question," a "trash or recycling concern" or a "water service problem," while over one-quarter of commercial customers reported contacting the DPU for a "billing question."



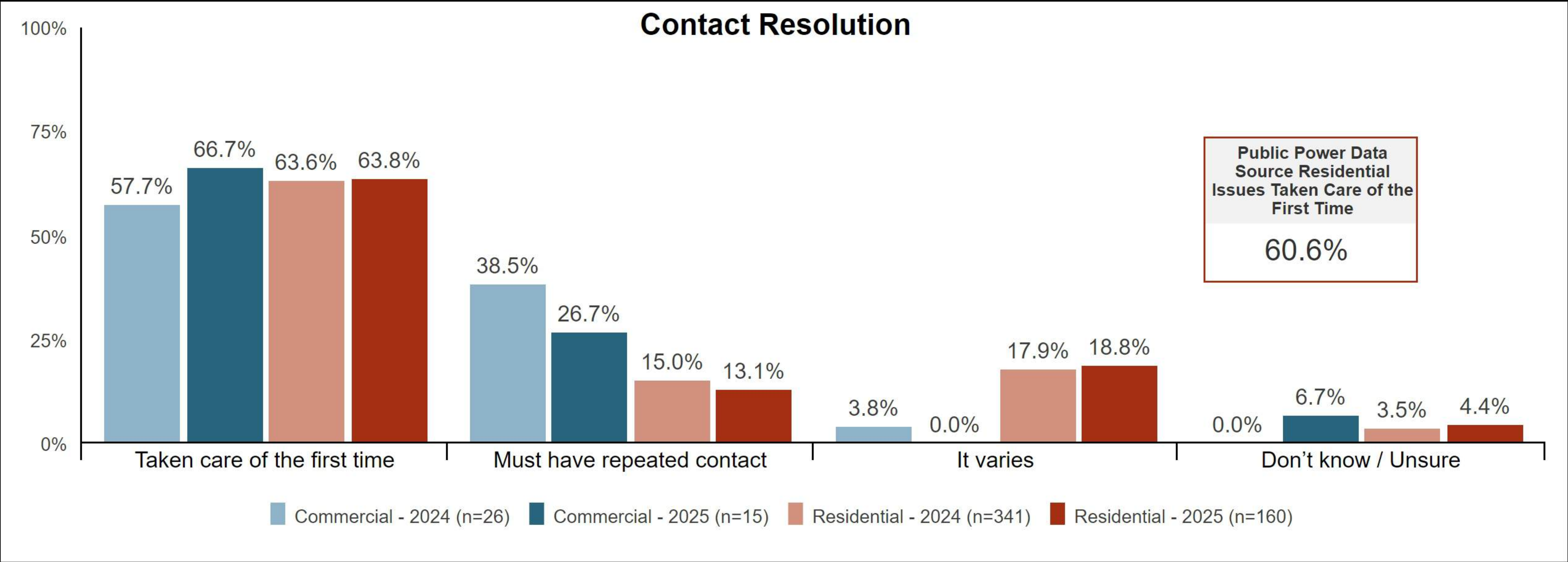
Purpose of Contact	2025	
	Commercial	Residential
Sample size	21	274
Billing question	28.6%	17.2%
Trash or recycling concern	0.0%	15.3%
Water service problem, question, issue, or concern	19.0%	12.8%
Payment or pay arrangement	4.8%	10.9%
Update account details	4.8%	7.3%
Electric service problem, question, issue, or concern	4.8%	7.3%
Move in / out	0.0%	6.9%
Sewer service problem, question, issue, or concern	0.0%	5.1%

Top 8 responses shown

Q: How satisfied were you with the service provided by the customer service department?
Q: If you have recently contacted DPU in the last 12 months, what was the purpose of the contact?

Customer Service | Issue Resolution

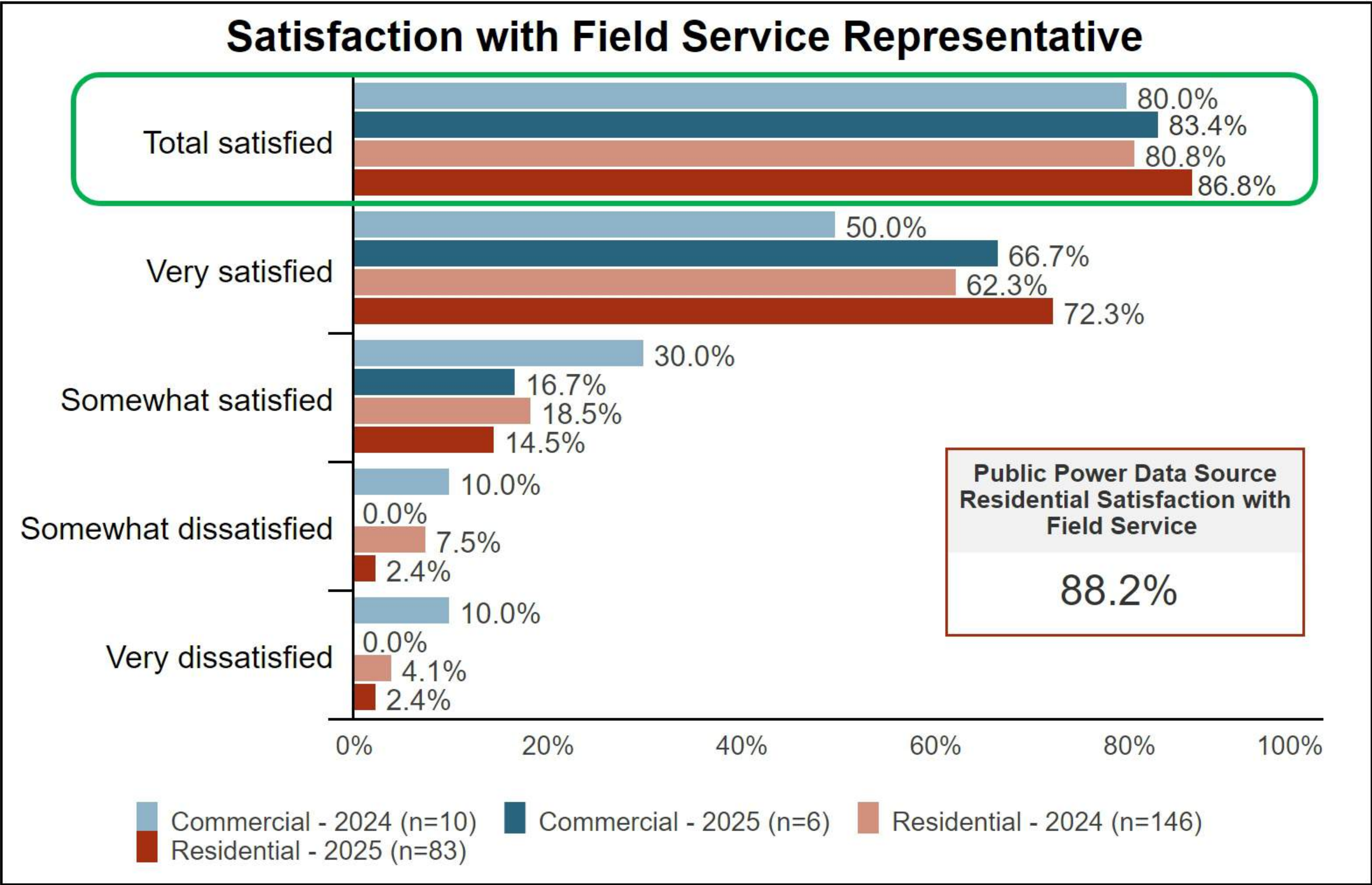
Over three-fifths of residential customers and two-thirds of commercial customers indicated their questions or issues were "taken care of the first time" when they contacted the DPU. Of note, an increased percentage of commercial customers indicated their issue was resolved the first time compared to 2024 (+9.0 percentage points).



Q: Generally, when you contact DPU, are your questions answered or issues resolved the first time, or must you contact them again?

Customer Service | Satisfaction with Field Service

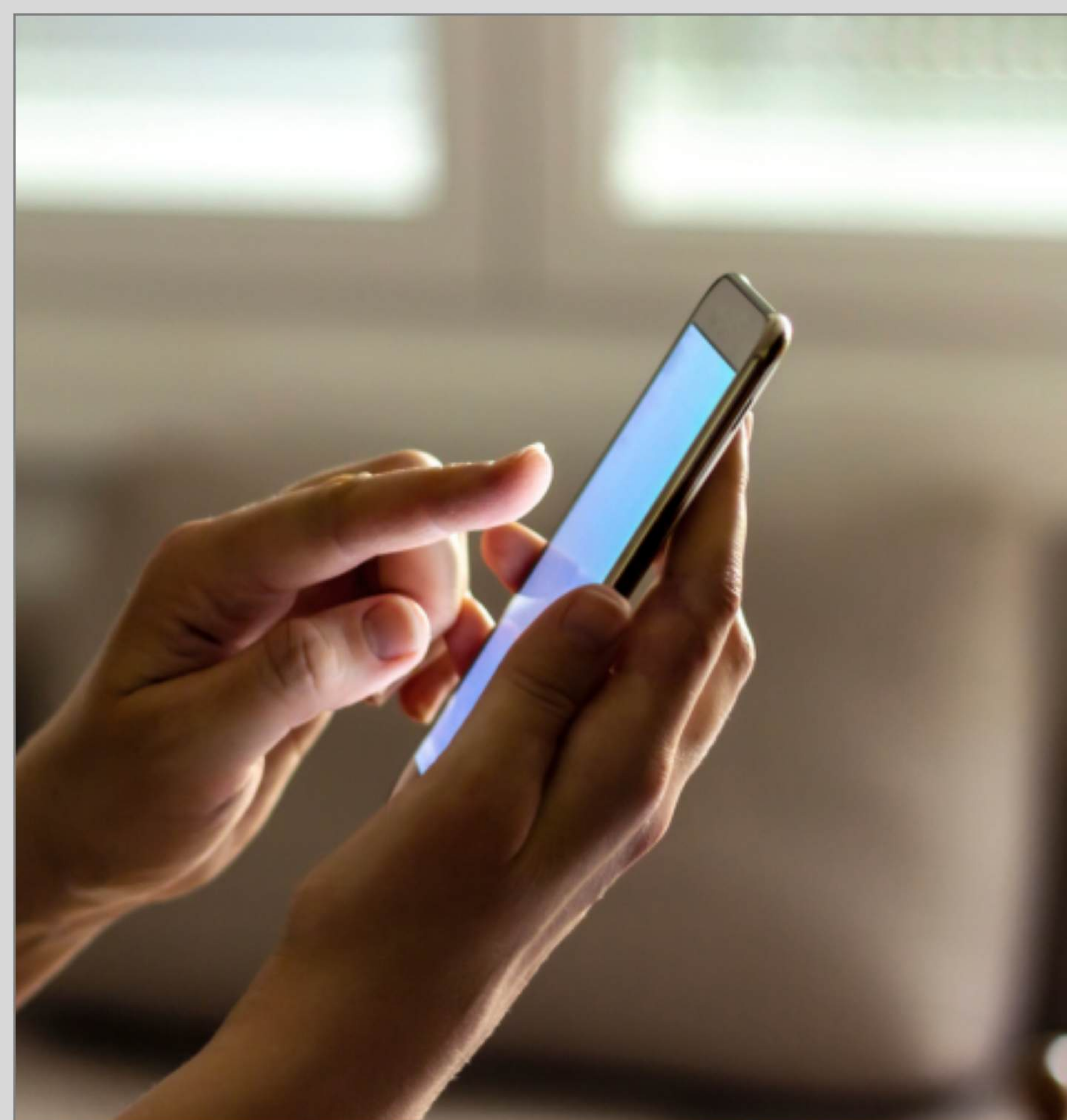
Satisfaction with the DPU's field representatives increased for both residential and commercial customers (+6.0 and +3.4 percentage points, respectively), with approximately four-fifths of both customer bases now reporting satisfaction in 2025. Among those customers who indicated a field representative visited their home or business in the last 12 months, the most common reason among residential and commercial customers was for a "meter reading."



Purpose of Visit	2025	
	Commercial	Residential
Sample size	21	274
Meter reading	14.3%	13.1%
Service problem / repair	9.5%	9.5%
Outage restoration	0.0%	1.5%

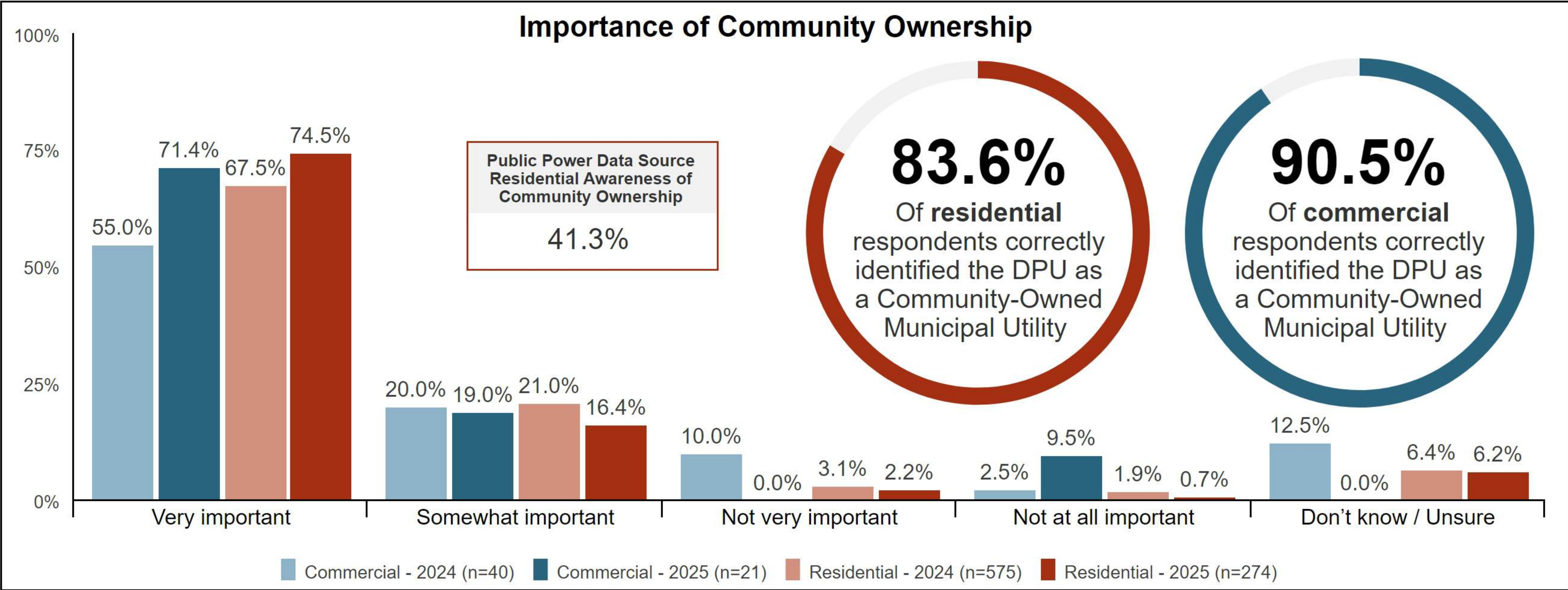
Q: If a field representative visited your home in the last 12 months, what was the purpose of the visit?
Q: How satisfied were you with the service provided by the DPU field representative?

Communication & Awareness



Awareness | Community Ownership

A vast majority of residential customers and commercial customers correctly identified the DPU as a Community-Owned Municipal Utility. Additionally, nine-out-of-ten residential customers (90.9%) and commercial customers (90.4%) indicated it is either "very important" or "somewhat important" to maintain local control of their municipal utility, with a higher percentage of commercial customers finding this important compared to 2024 (+15.4 percentage points).

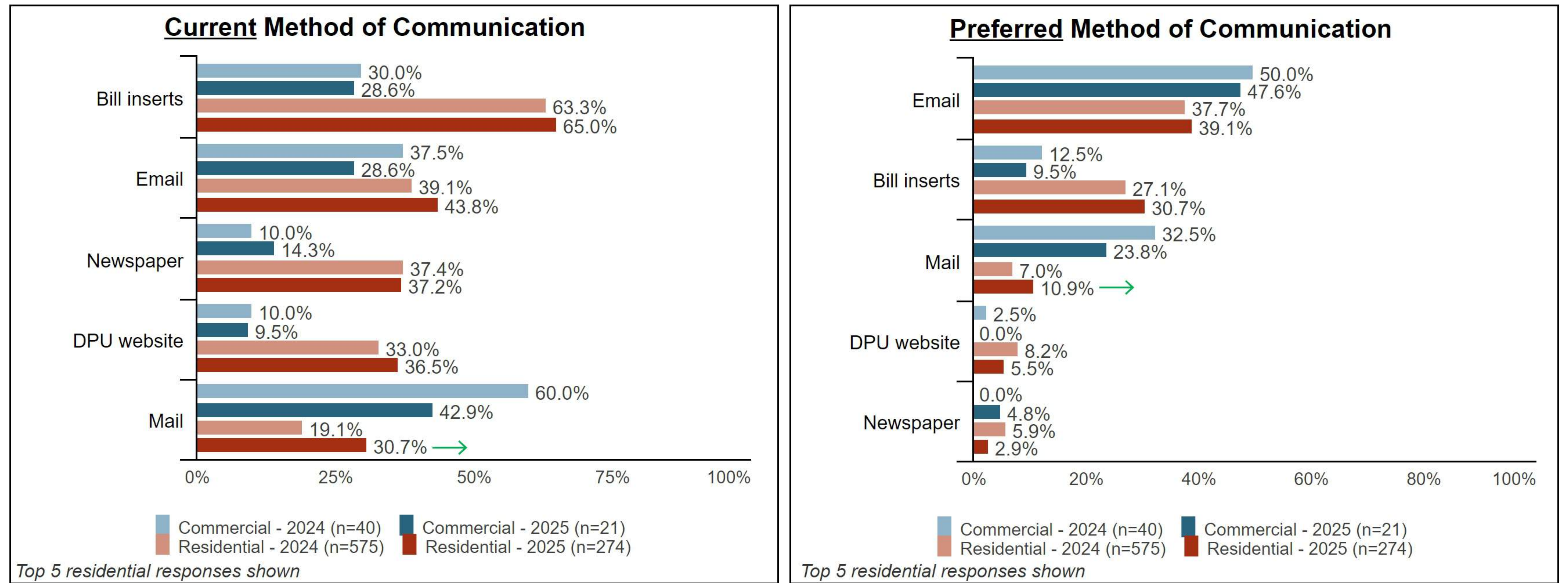


Q: Are your utility services provided by a "Community-Owned Municipal Utility" or a "Business-Owned or Privately-Owned Investor Company?"

Q: DPU is a "Community-Owned Municipal Utility." How important to you is it to maintain local control of your municipal utility?

Communication | Current vs. Preferred Methods

The most common methods of receiving information among residential customers were "bill inserts" and "email," with nearly two-fifths of surveyed residential customers preferring to receive information about the DPU through "email." Among commercial customers, the most common method of receiving information was "mail," while nearly one-half of commercial customers reported a preference for "email" communication.

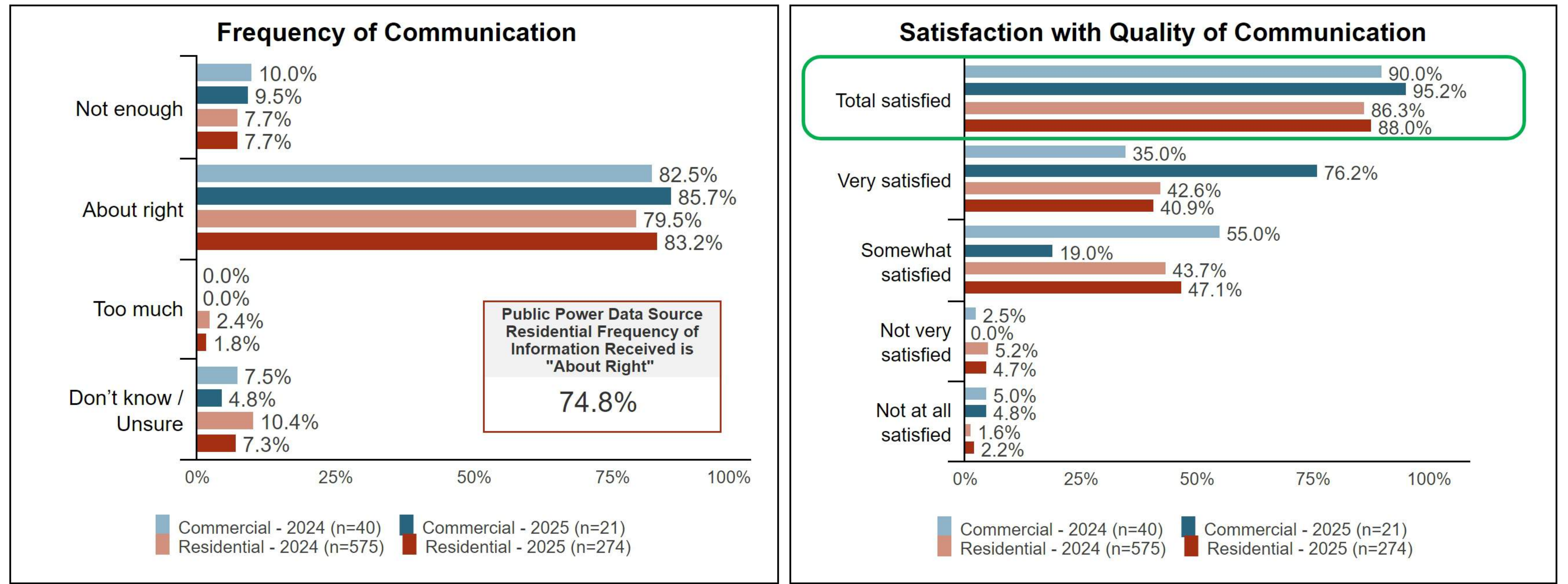


Q: Please tell me how you **currently** receive information about DPU?
Q: Please tell me your most **preferred** method of receiving information about DPU.

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

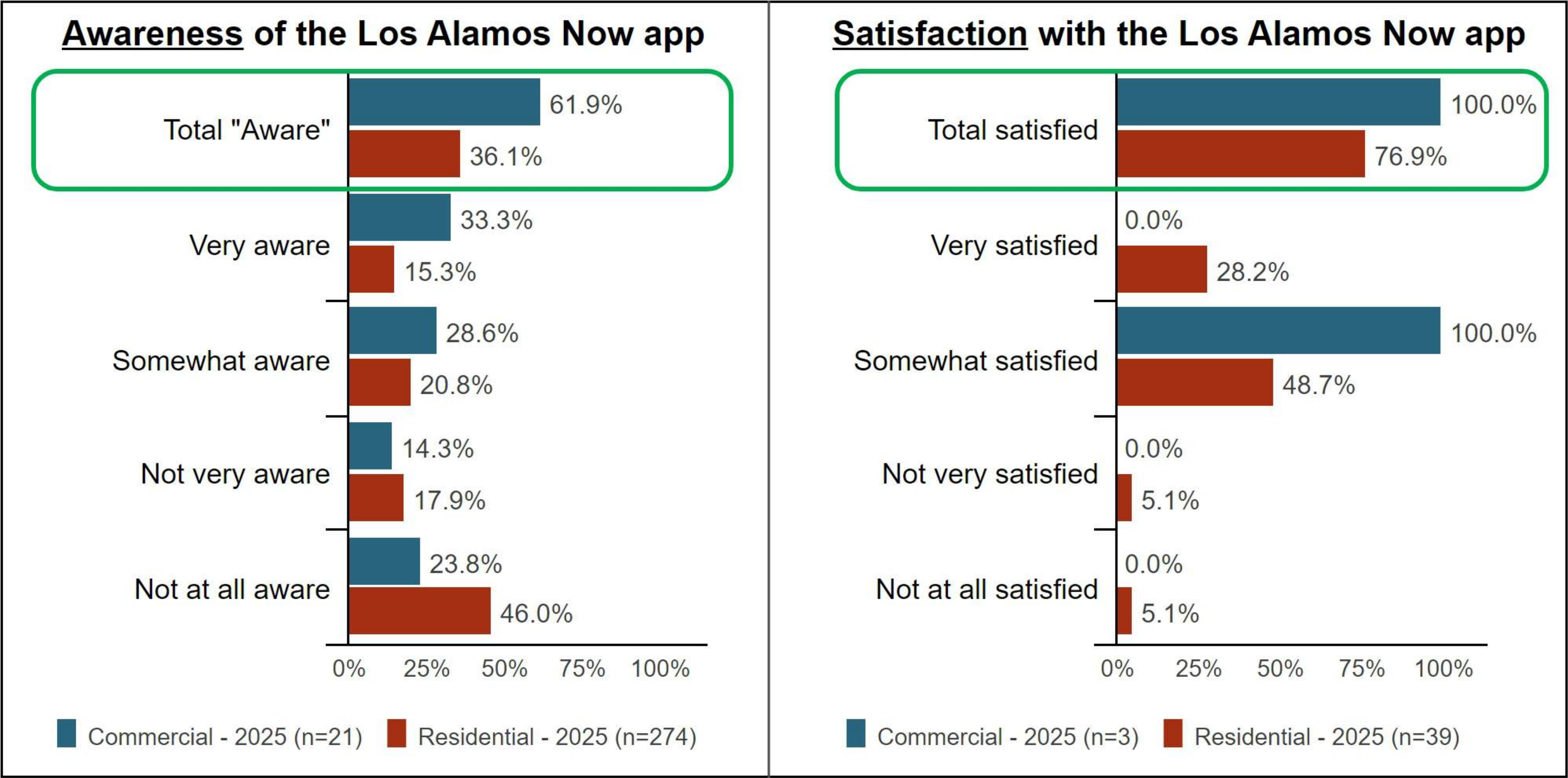
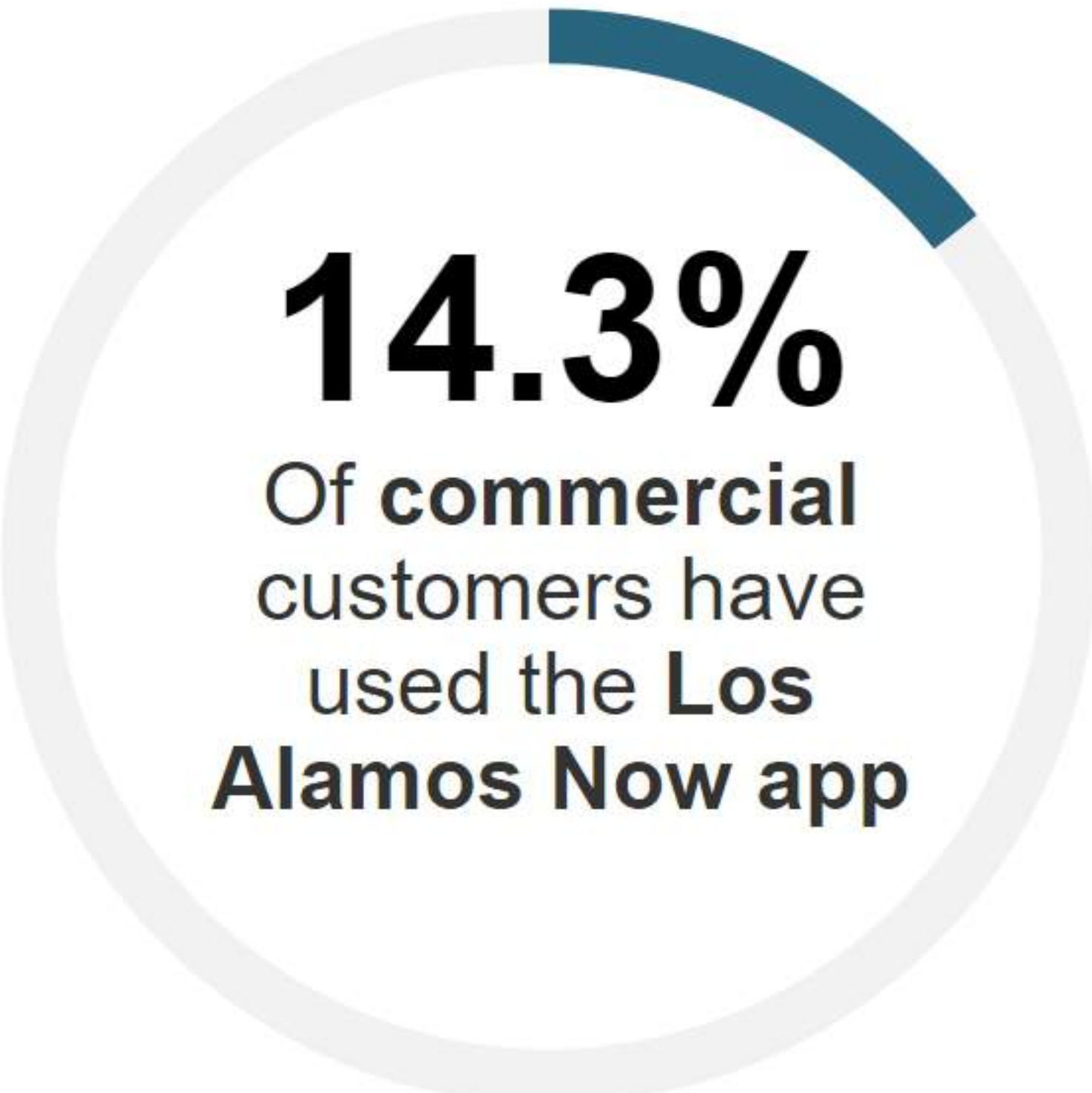
A majority of both customer bases indicated the frequency at which they receive information from the DPU is "about right," reflecting an increase among both residential and commercial customers compared to the previous year (+3.7 and +3.2 percentage points, respectively). Similarly, a majority of residential and commercial customers reported being satisfied with the quality of communication they receive from the DPU, with slightly more surveyed commercial customers being satisfied with the communication they receive from the DPU compared to 2024 (+5.2 percentage points).



Q: How would you describe the frequency at which you receive information from DPU?
Q: Overall, how satisfied are you with the quality of communication you receive from DPU?

Communication | Satisfaction with Los Alamos Now app

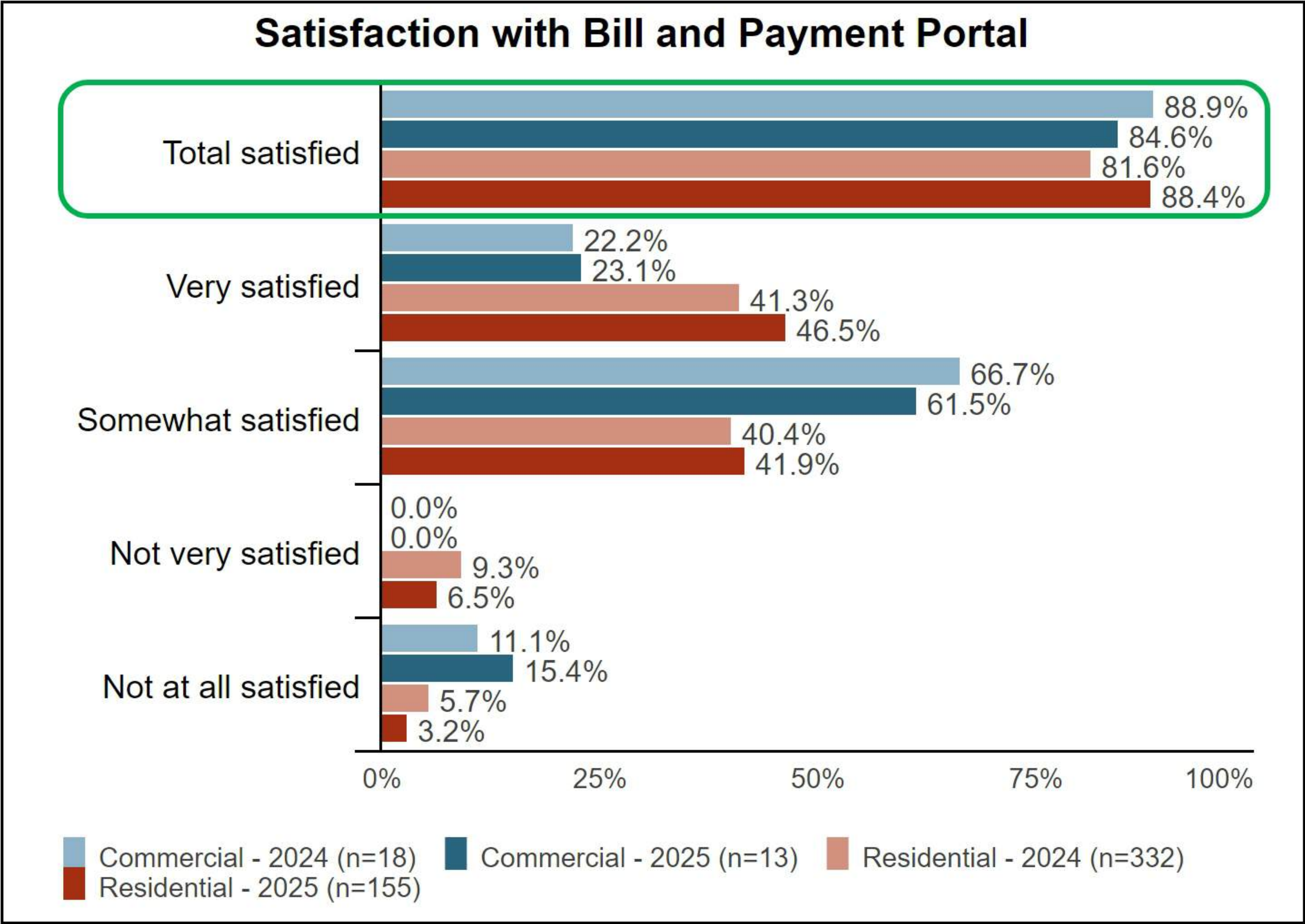
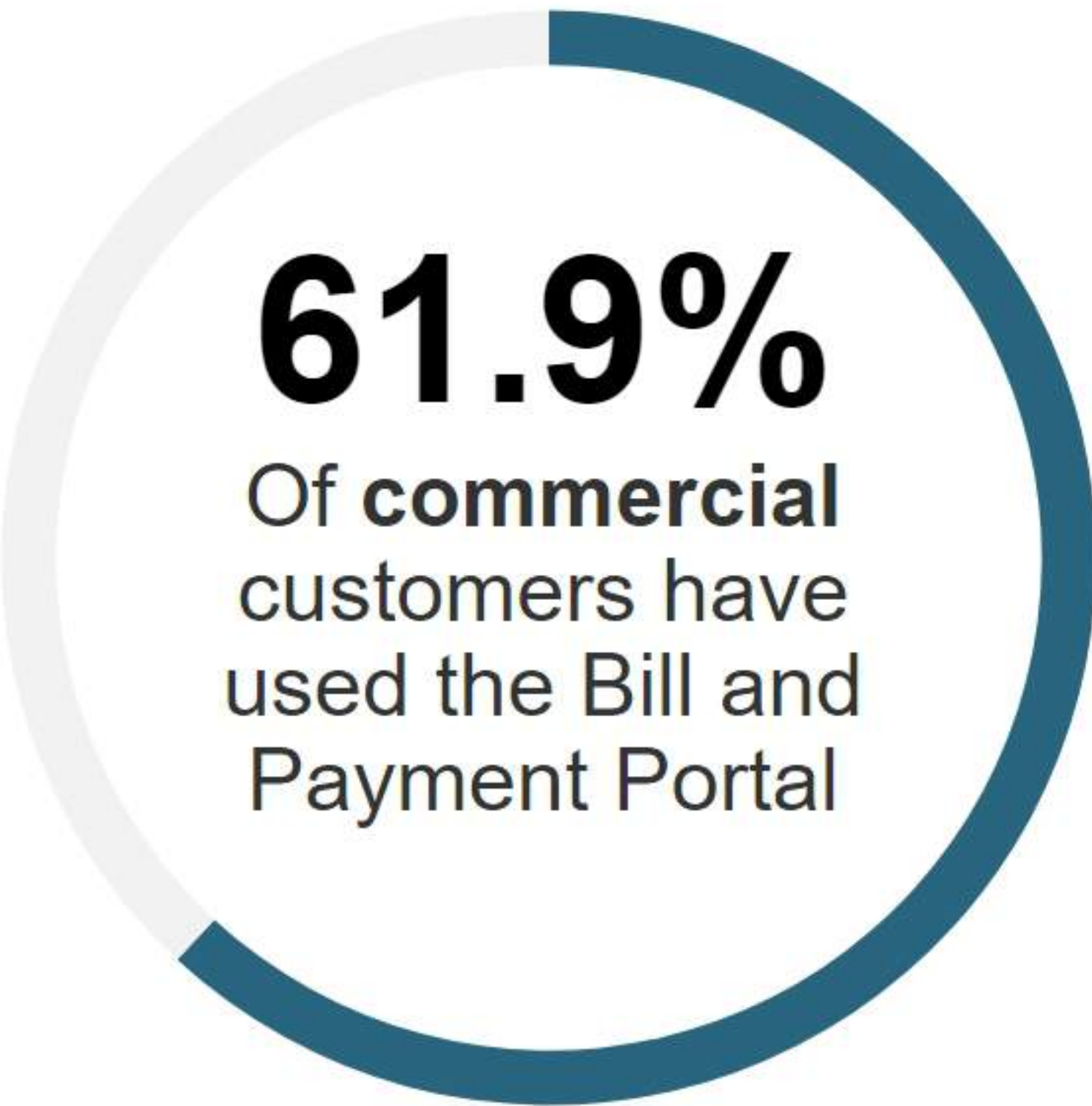
Over one-third of residents and three-fifths of commercial customers were aware of the *Los Alamos Now* app. Among customers who have used the app, over three-quarters of residents and all commercial customers reported being either "very" or "somewhat satisfied" with it.



Q: Prior to this survey, how aware were you of the DPU's app, Los Alamos Now?
Q: Please indicate if you have used any of DPU's Self-Service tools. (Los Alamos Now app)
Q: How satisfied are you with each of DPU's Self-Service tools? (Los Alamos Now app)

Portal | Satisfaction with Bill and Payment Portal

Over one-half of residential customers and three-fifths of commercial customers reported using the Bill and Payment Portal. Among those respondents who have used the Bill and Payment Portal, over four-fifths of both customer bases reported being satisfied with their experience using the portal.





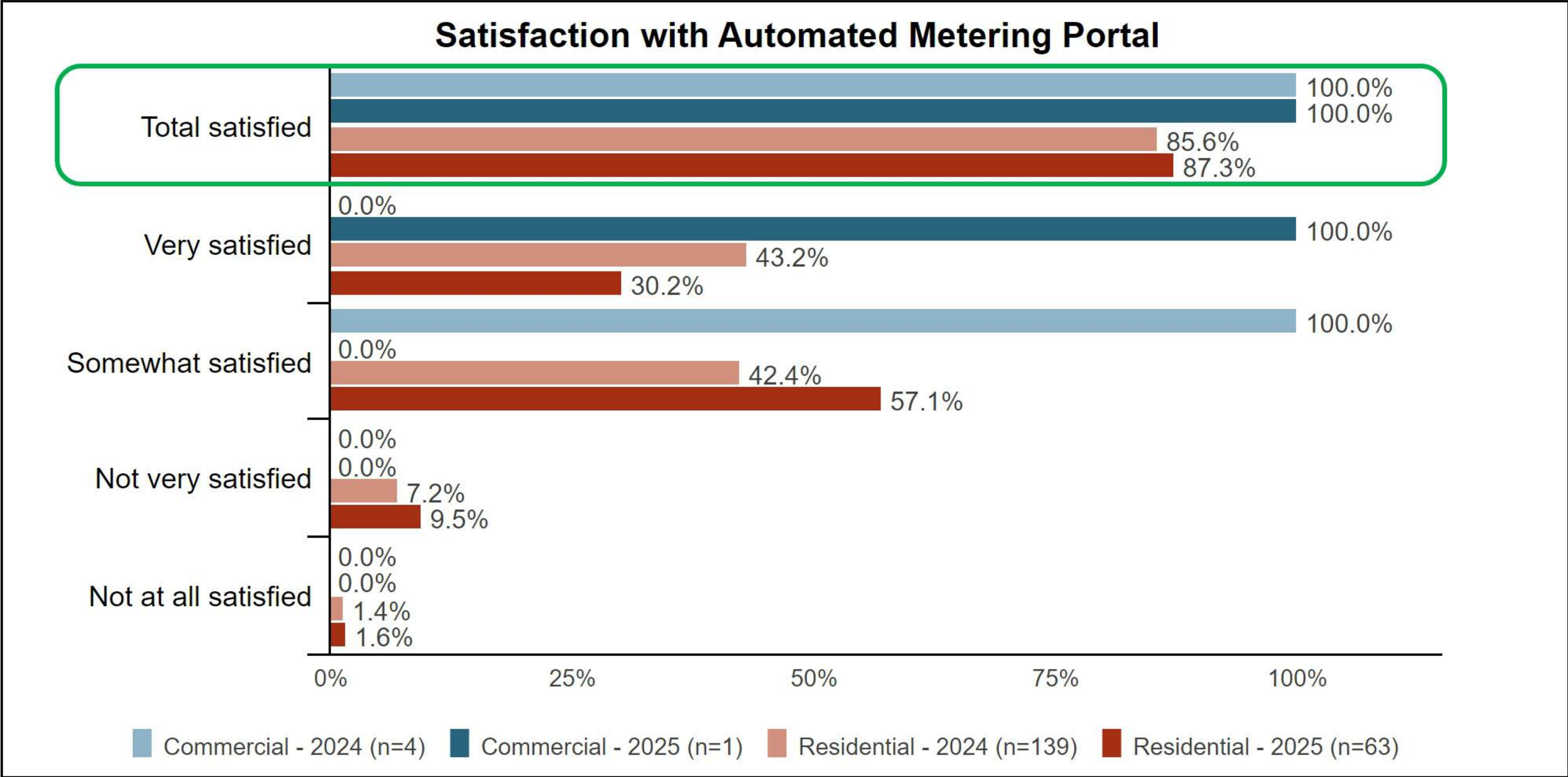
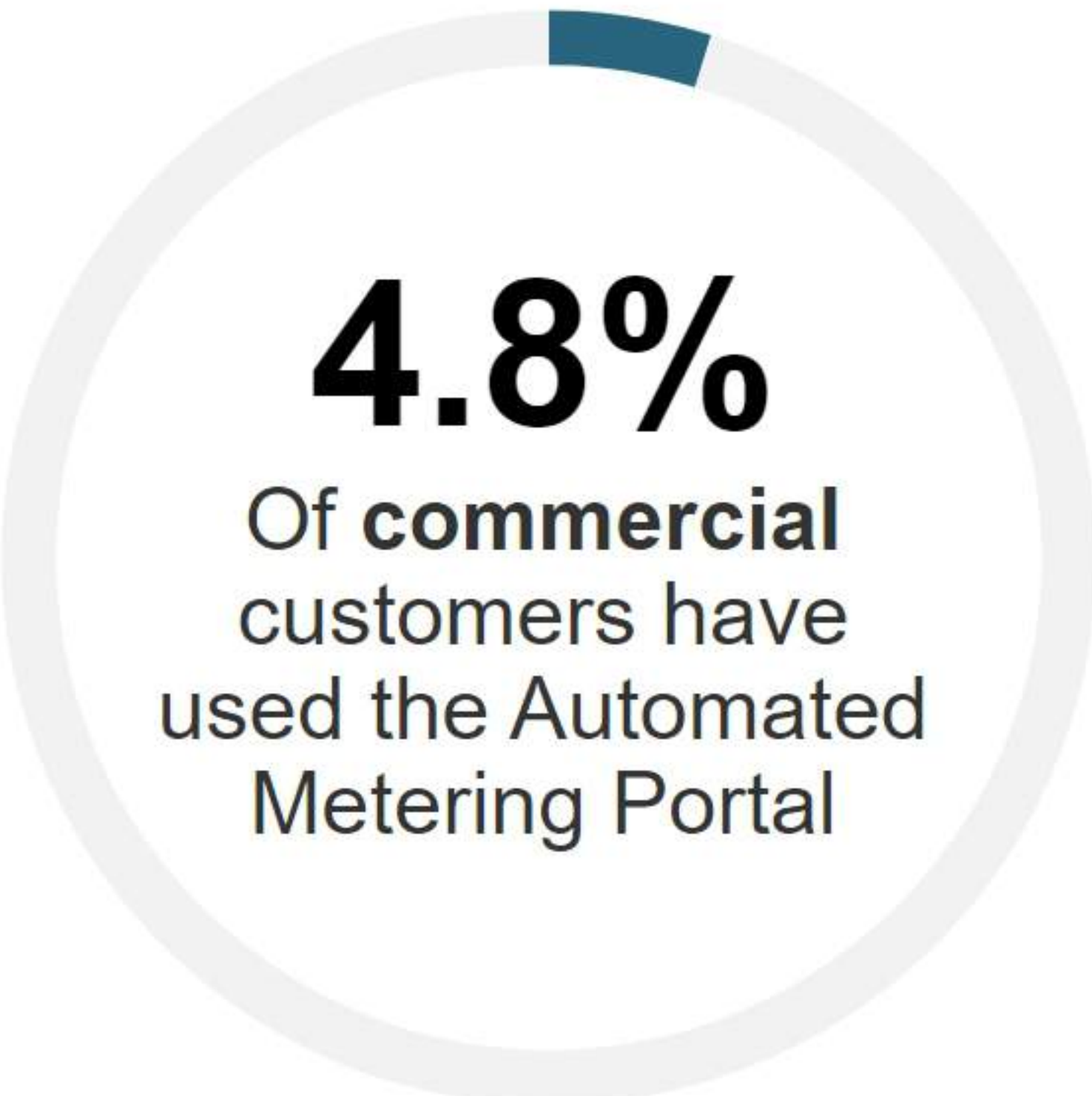
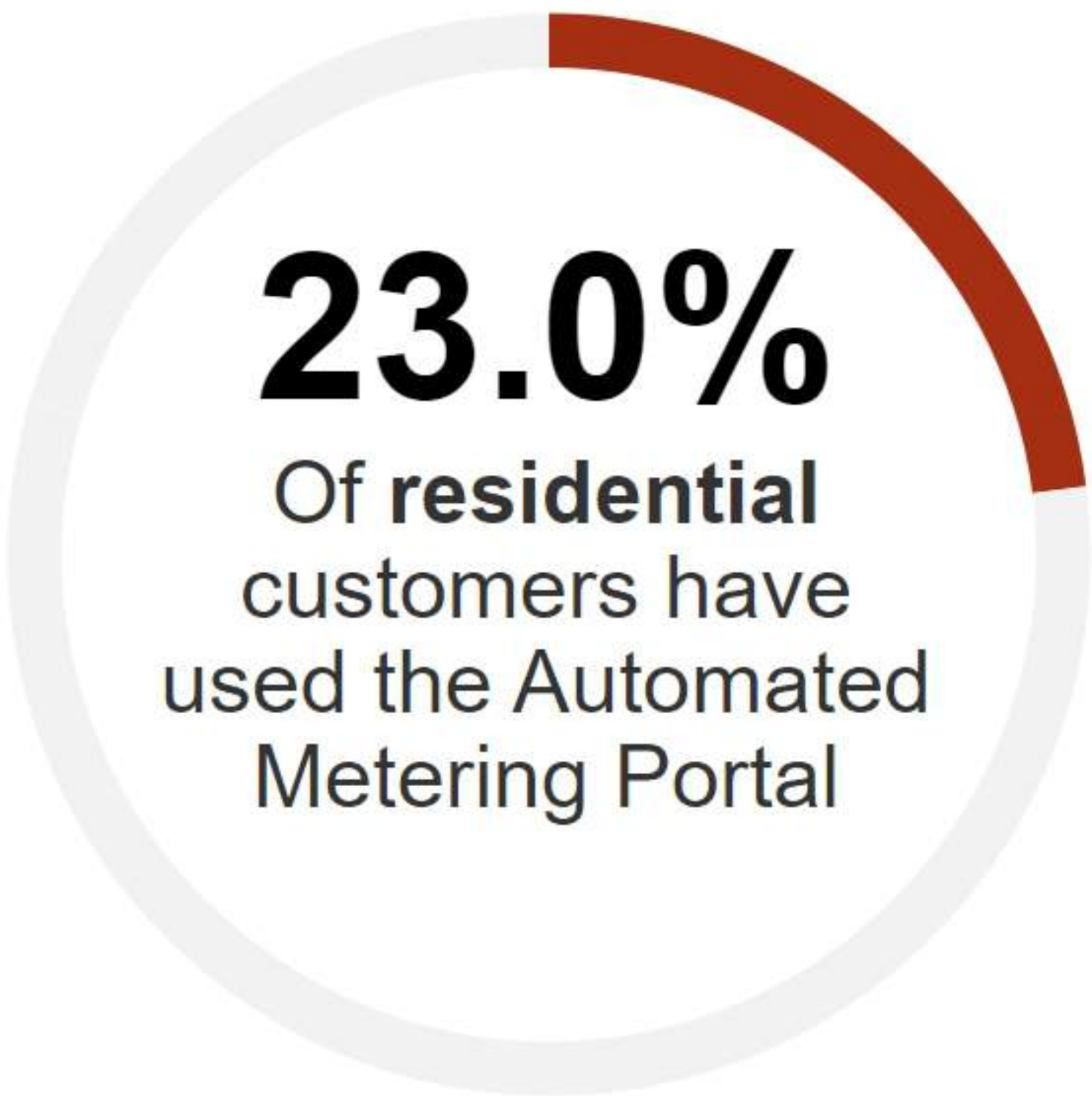
Digging Deeper

Significantly more residents **54 years of age or younger (78.3%)** reported utilizing the DPU's Bill and Payment Portal compared to residents **55 years of age or older (47.8%)** (+30.5 percentage points).

Q: Please indicate if you have used any of DPU's Self-Service tools. (Bill and payment portal)
Q: How satisfied are you with each of DPU's Self-Service tools? (Bill and payment portal)

Portal | Satisfaction with Automated Metering Portal

Less than one-quarter of residential and just one (1) commercial customer reported using the Automated Metering Portal. Of those customers, nearly nine-out-of-ten residents and the one (1) business reported being satisfied with their experience using it.



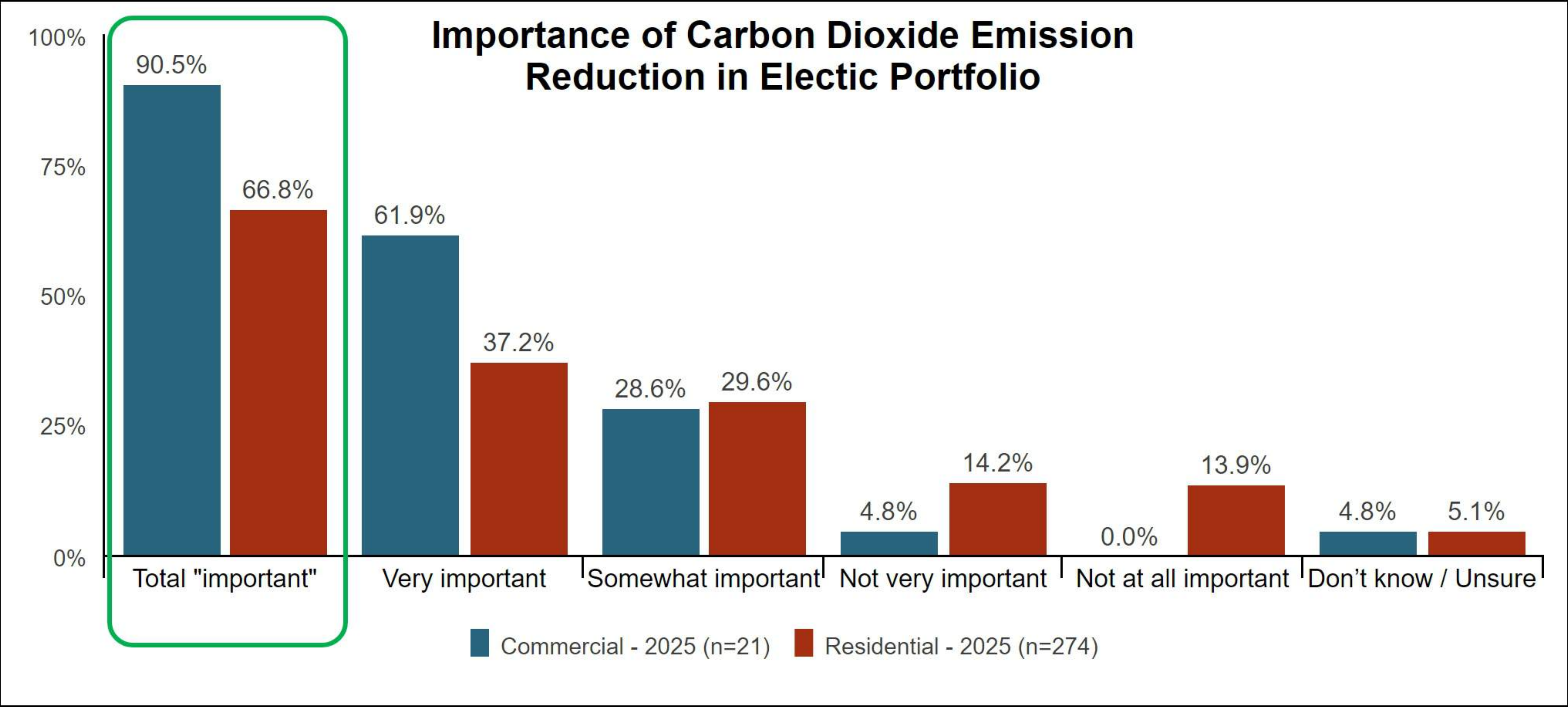
Q: Please indicate if you have used any of DPU's Self-Service tools. (Automated metering portal)
Q: How satisfied are you with each of DPU's Self-Service tools? (Automated metering portal)

Carbon Neutral



Carbon Neutral | Importance

Two-thirds of residential customers and nine-out-of-ten of commercial customers reported that the reduction of carbon dioxide emissions in the overall electric portfolio was either "very" or "somewhat important" to them. Of note, over one-quarter of residential customers (28.1%) reported that the reduction of carbon dioxide emissions is "not very" or "not at all important" to them.



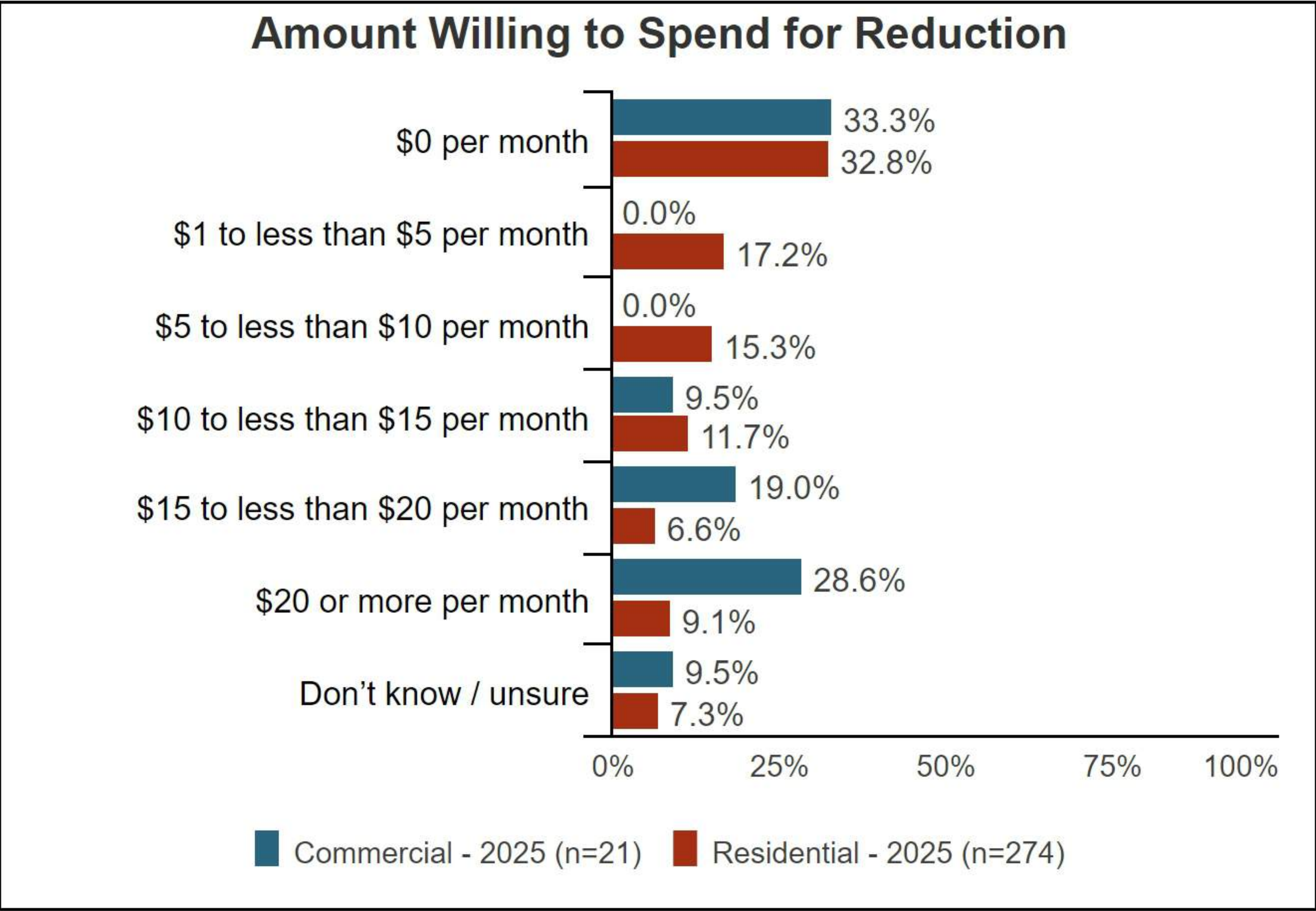
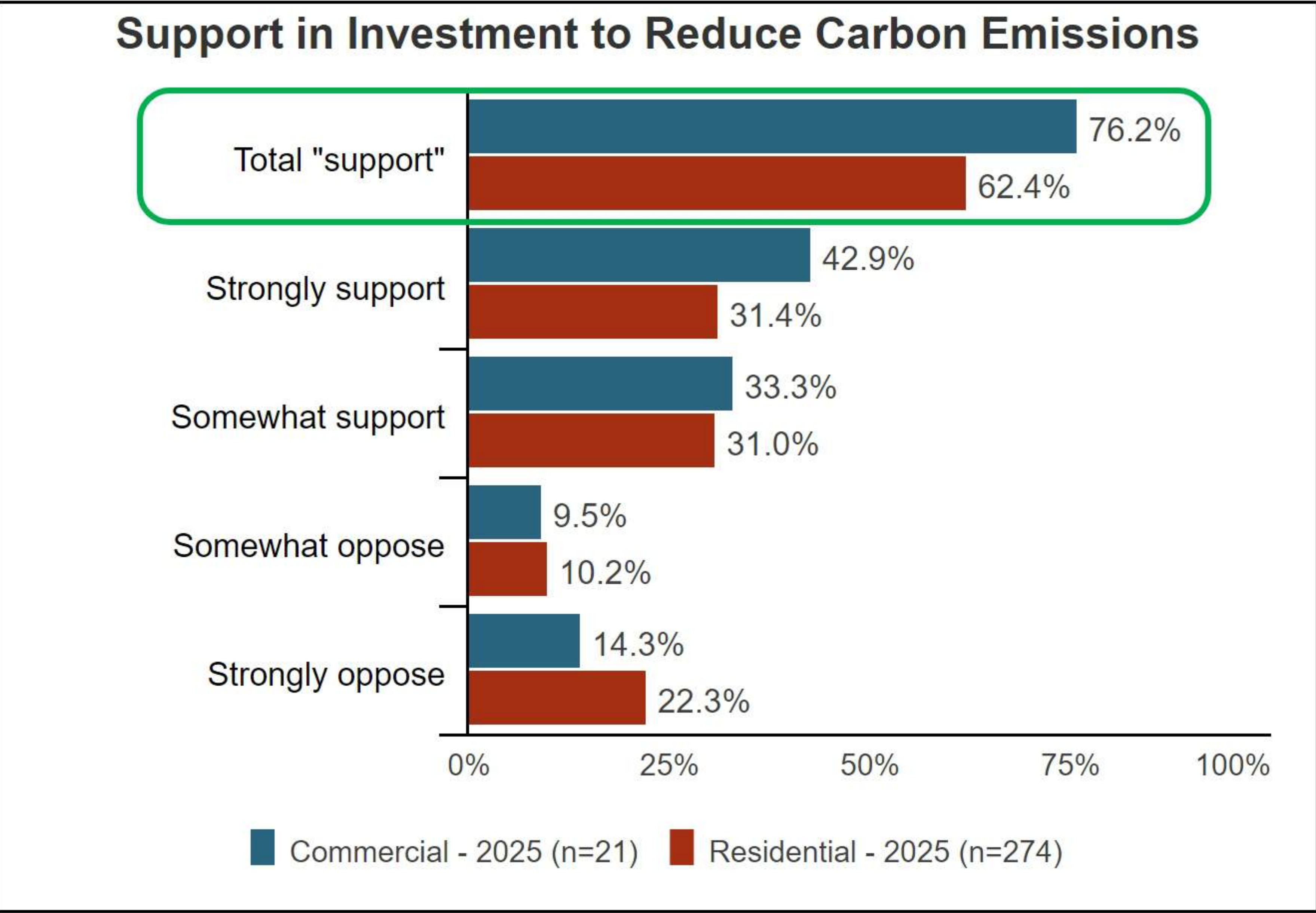
Digging Deeper

More residents **55 years of age or older (70.8%)** reported that the reduction of carbon emissions was important overall to the electric portfolio of the DPU compared to residents **54 years of age or younger (58.1%)** (+12.7 percentage points).

Q: In your opinion, how important is the reduction of carbon dioxide emissions in the overall electric portfolio of the DPU?

Carbon Neutral | Support for Reduction

Over three-fifths of residential customers and over three-quarters of commercial customers reported either "strongly" or "somewhat" supporting the DPU investing in clean energy to reduce carbon emissions, even if it caused an increase in their electric bill. However, roughly one-third of both customer bases would not be willing to spend any extra money per month for this. Over one-sixth of residential customers would be willing to pay "\$1 to less than \$5 per month," and a similar frequency would be willing to pay "\$5 to less than \$10 per month." In addition, over one-quarter of commercial customers would be willing to pay "\$20 or more per month."

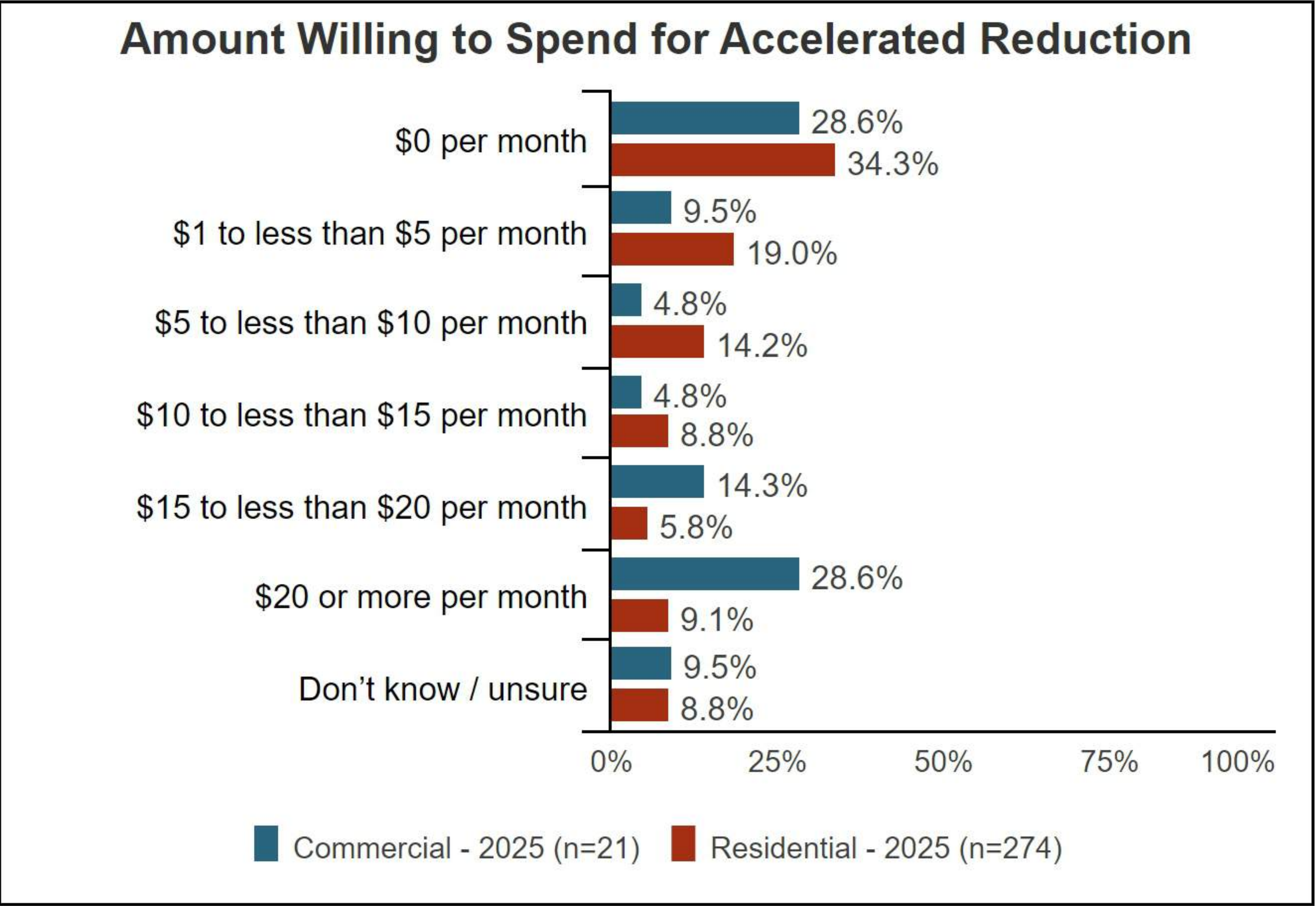
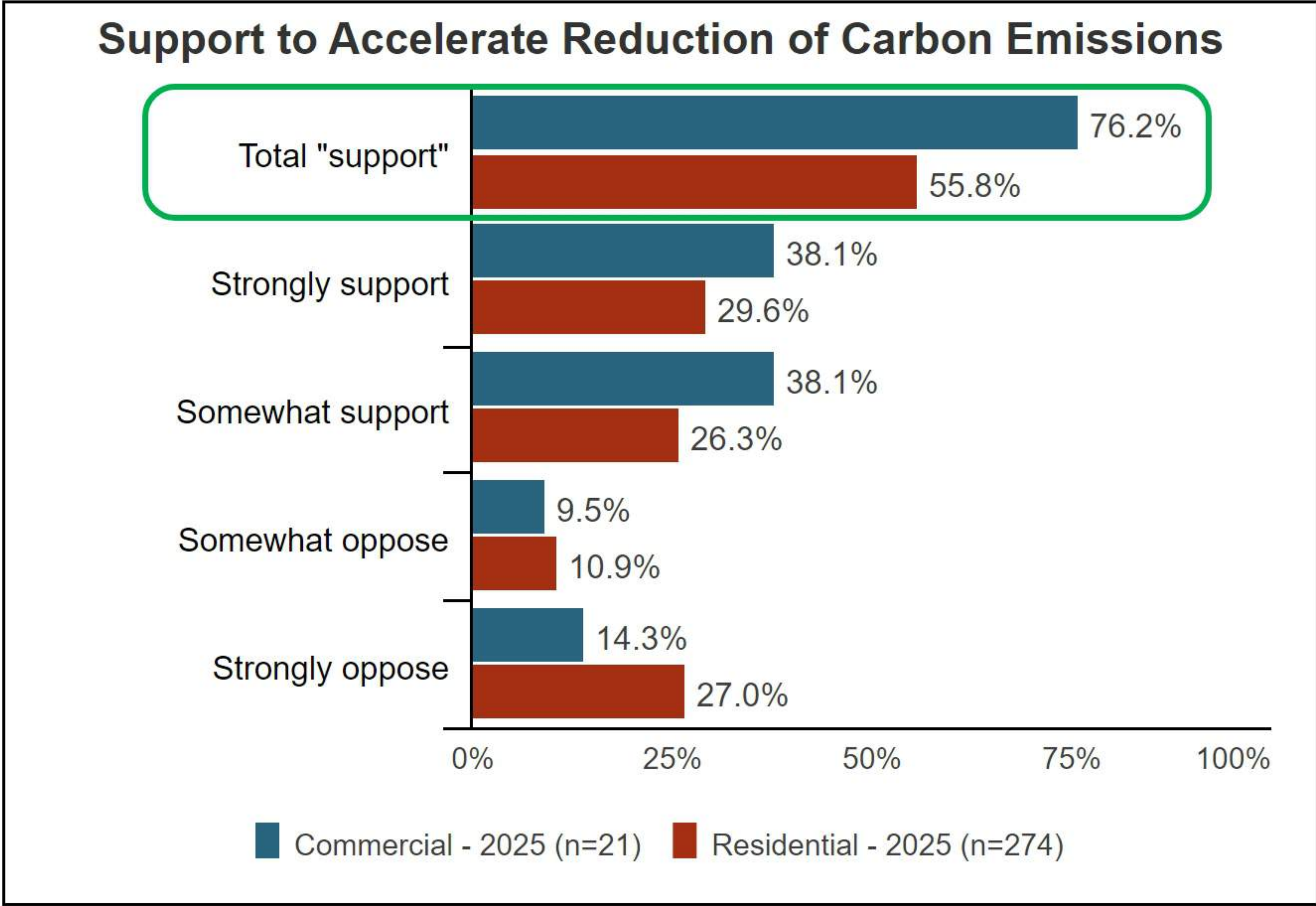


Q: If investing in clean energy to reduce carbon dioxide emissions increased your electric bill, how strongly do you support or oppose the DPU investing in clean energy in an effort to reduce carbon dioxide emissions?

Q: How much more money per month would you be willing to spend on your electric bill to allow the DPU to invest in clean energy to reduce carbon dioxide emissions?

Carbon Neutral | Support for Acceleration

Over one-half of residential customers and over three-quarters of commercial customers reported either "strongly" or "somewhat" supporting the DPU accelerating its goals to reduce carbon emissions, even if it caused an increase in their electric bill. Over one-third of residential and over one-quarter of commercial customers would not be willing to spend any extra money per month for this, while nearly one-fifth of residential customers would be willing to pay "\$1 to less than \$5 per month." Of note, over one-quarter of commercial customers would be willing to pay "\$20 or more per month" to allow the DPU to accelerate it's goals to reduce carbon dioxide emissions.



Q: How strongly do you support or oppose the DPU accelerating its goals to reduce carbon dioxide emissions, if doing so increased your electric bill?
Q: How much more money per month would you be willing to spend on your electric bill to allow the DPU to accelerate its goals to reduce carbon dioxide emissions?

Table of Contents

SECTION ONE
About GreatBlue

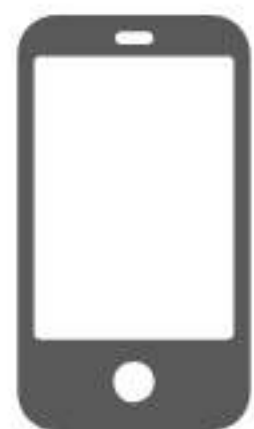
SECTION TWO
Project Overview

SECTION THREE
Key Study Findings

SECTION FOUR
Considerations

SECTION FIVE
Aggregate Data (Provided Separately)

Considerations



Promote Usage of the Los Alamos Now App

While over one-third of residential customers (36.1%) and three-fifths of commercial customers (61.9%) were aware of the Los Alamos Now app, actual usage remains low. Among those who have used the app, satisfaction is high, with over three-quarters of residential (76.9%) and all commercial (100.0%) customers reporting satisfaction with their experience. This indicates a gap between awareness and adoption that the DPU could explore further to encourage greater usage.

Actionable Insights:

- Increase communication efforts around the app's features and benefits through multiple channels (e.g., email, bill inserts, social media) to highlight its value and drive engagement.
- Streamline the registration process and, if not already being done, provide step-by-step guidance for new users to reduce friction in adoption.
- Engage a sample of residential and commercial customers in a UX (User Experience) test to measure the app's interface and functionality. Gather feedback on usability, navigation, and features to identify areas for improvement.

By addressing barriers to adoption and improving the user experience, the DPU can increase customer engagement with the Los Alamos Now app, which could lead to enhanced satisfaction and stronger communication with customers.



Expand and Promote Clean Energy Initiatives

A significant portion of both residential and commercial customers support the DPU's investment in clean energy to reduce carbon dioxide emissions, even if it results in higher electric bills. However, resistance to higher costs and lower engagement among younger residential customers suggest an opportunity to improve outreach and communication around the benefits of clean energy.

Actionable Insights:

- Highlight the environmental and long-term financial benefits of clean energy investments to increase customer buy-in.
- Develop targeted messaging for younger residential customers, who showed lower engagement with clean energy goals compared to older customers.
- Use preferred communication channels, such as email, to share updates about clean energy progress.

Promoting the benefits and value of clean energy investments could increase customer support and strengthen alignment with the DPU's sustainability goals.



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