

LOS ALAMOS
where discoveries are made

Report of Findings

2026 Voice of Customer Study

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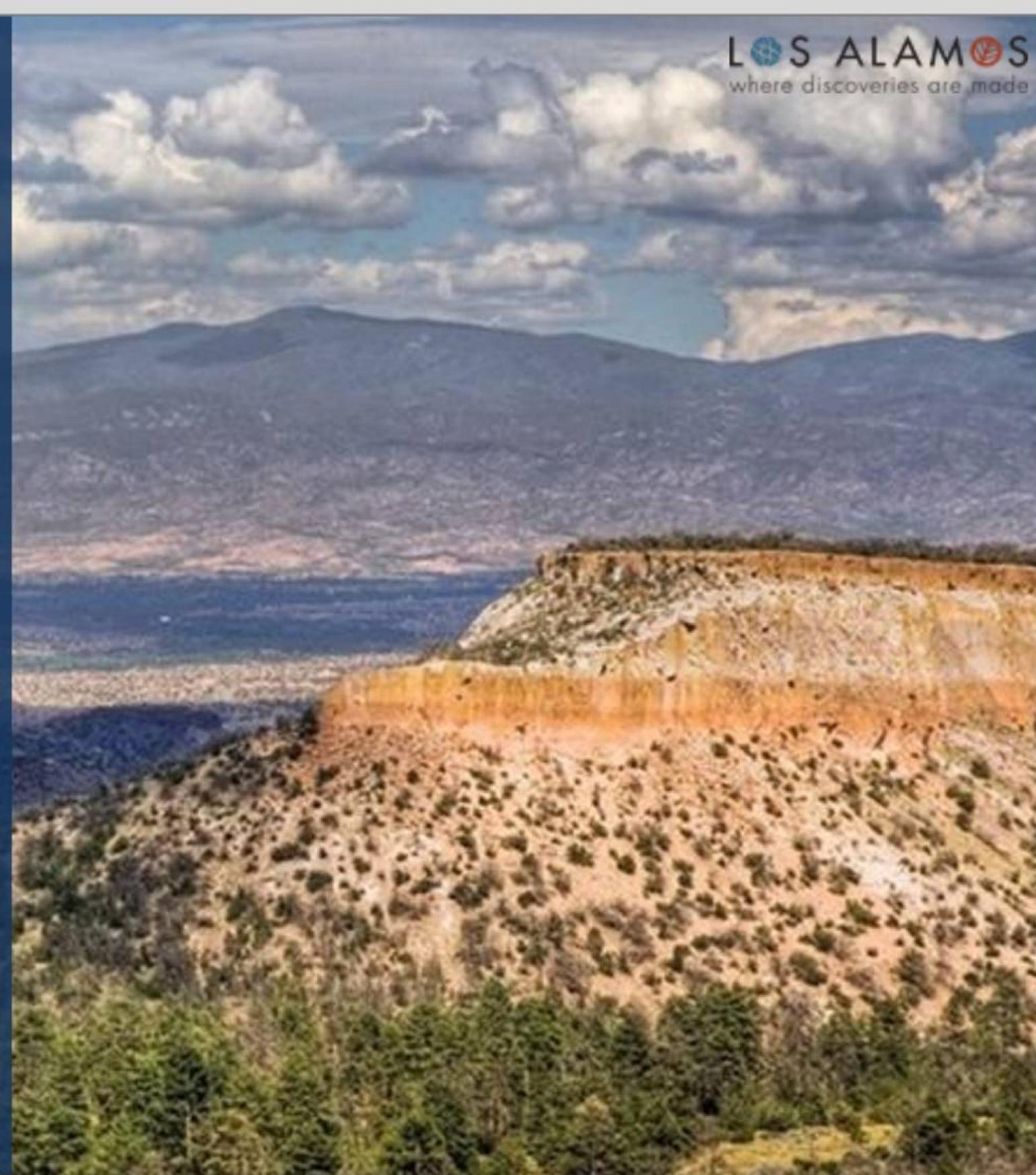
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Aggregate Data

(Provided Separately)





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 residential and commercial 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

The 2026 Voice of Customer study leveraged a quantitative research methodology to address the following areas of investigation:

- 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 profile of residential respondents

Research Methodology Snapshot | Residential



Methodology Digital	No. of Completes 400	No. of Questions 53*	Incentive None	Sample Customer List
Target Residential Customers	Quality Assurance Dual-level**	Margin of Error +/- 4.7%	Confidence Level 95%	Research Dates January 13 - February 24, 2026

* 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 a computer-aided interviewing platform, ensure the integrity of the data is accurate.

Research Methodology Snapshot | Commercial



Methodology Digital & Telephone	No. of Completes 40	No. of Questions 47*	Incentive None	Sample Customer List
Target Commercial Customers	Quality Assurance Dual-level**	Margin of Error +/- 13.8%	Confidence Level 95%	Research Dates January 13 - February 24, 2026

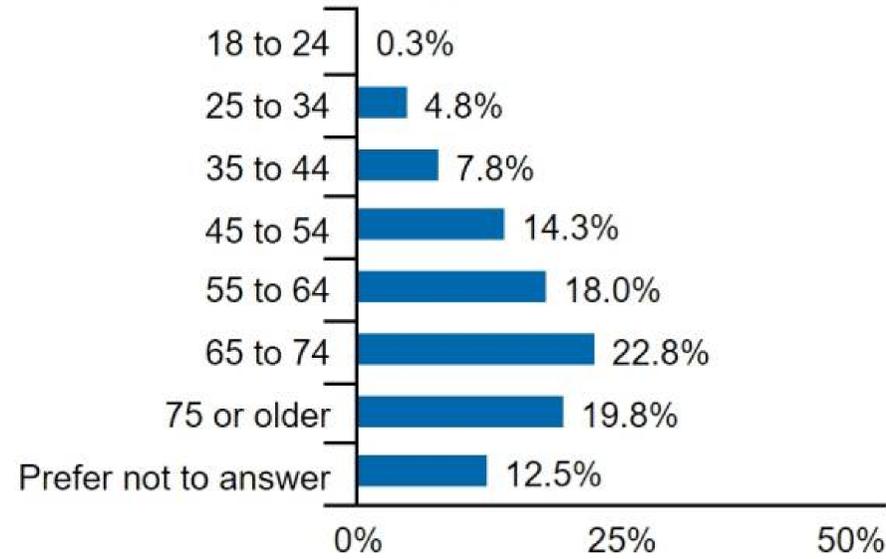
* This represents the total possible number of questions; not all respondents will answer all questions based on skip patterns and other instrument bias.

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

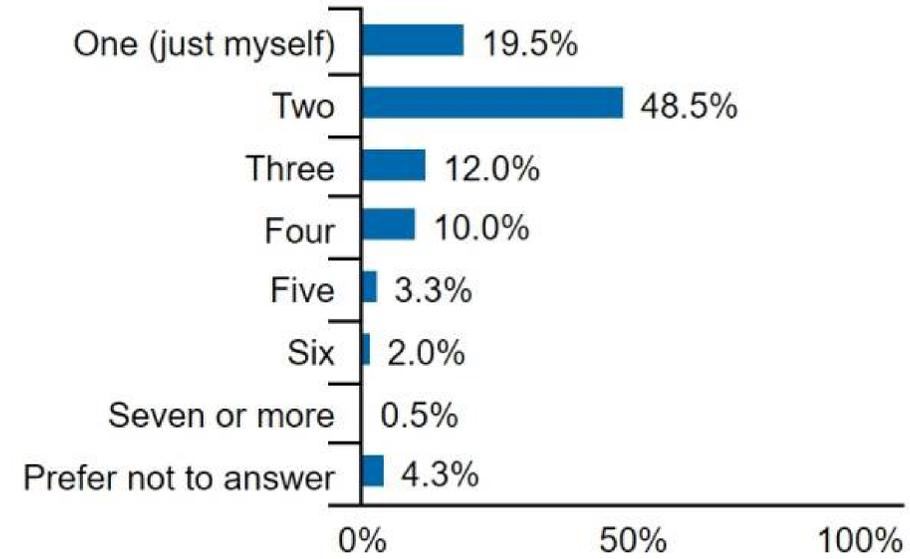
Respondent Profile | Demographics



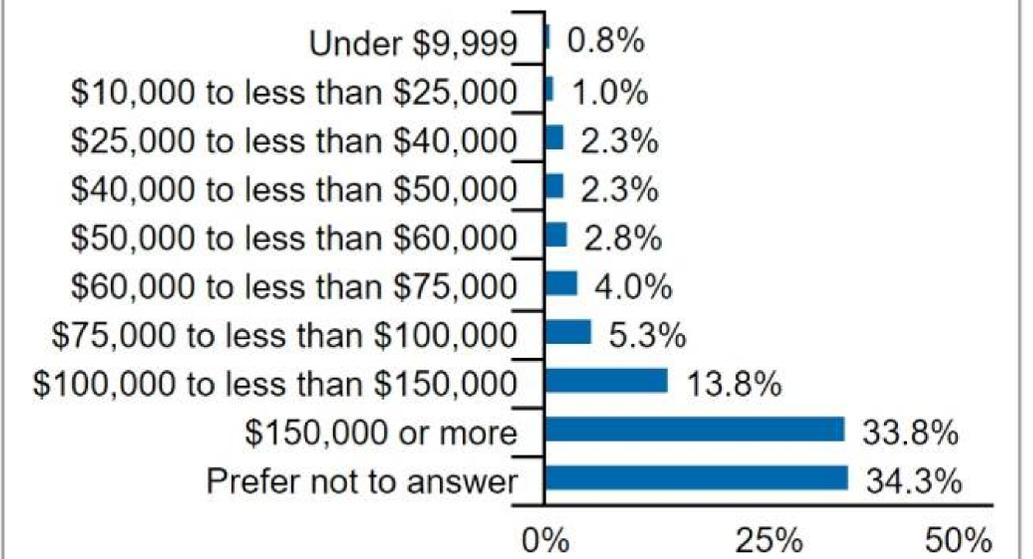
Age



Household Size



Income

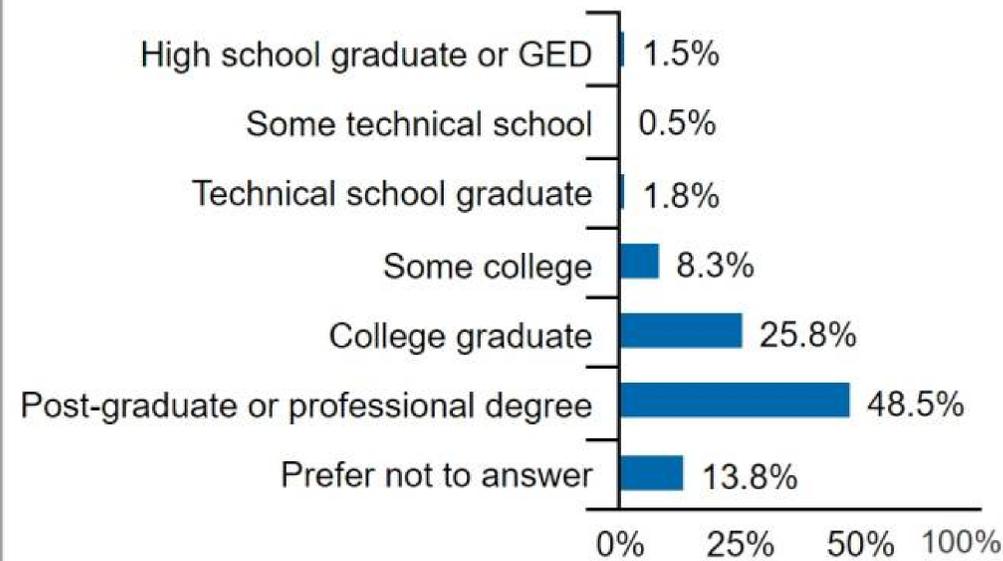


Rent vs. Own

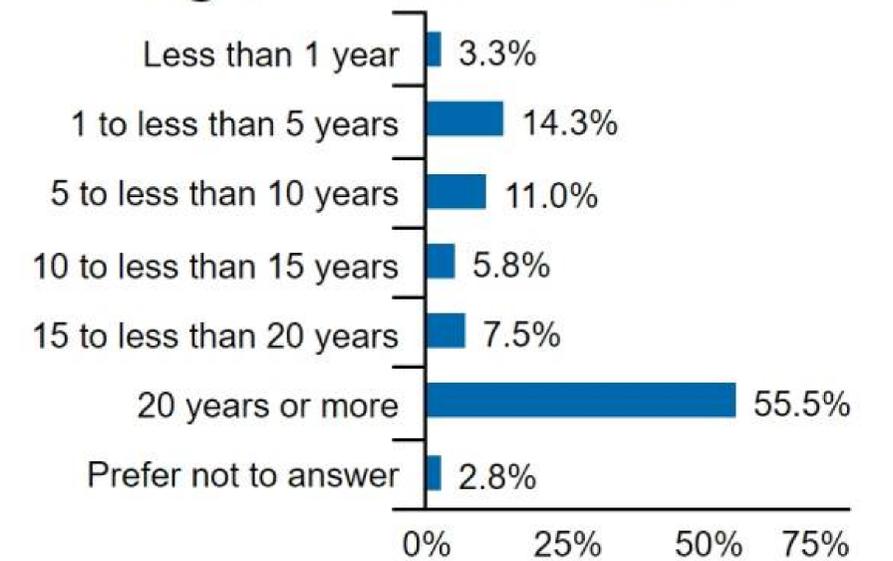
88.0% | **8.8%**
Own | Rent

3.3% of respondents provided responses of "prefer not to answer" or "don't know"

Education



Length of Time as Customer



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

(+/-)

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

Key Study Findings



Ratings

- In 2026, when rating the DPU on a series of organizational characteristics, residential customers reported an average positive rating of 70.3%, while commercial customers reported an average rating of 75.9%.
- Over 85.0% of residential and commercial customers reported being satisfied with the **overall quality of services** received from the DPU in 2026.
- Similarly, approximately nine-out-of-ten or more residential and commercial customers reported being satisfied with the **reliability** of all services they received from the DPU in 2026.
- The net positive rating (satisfied customers + advocates) among residential customers decreased to 70.8% (from 79.9% in 2025), while the NP+S among commercial customers decreased to 82.5% (from 85.7% in 2025).
- Satisfaction with customer service decreased for both residential (83.4%, -3.5 percentage points) and commercial customers (66.7%, -13.3 percentage points).
- Nearly two-thirds of residential customers (65.3%) and nearly three-fifths of commercial customers (58.3%) indicated their questions or issues were "taken care of the first time" when they contacted the DPU.

Communications

- A majority of residential (86.3%) and commercial customers (95.0%) reported being satisfied with the quality of the DPU's communications.
- Most residential (80.5%) and commercial customers (85.0%) reported that the frequency of communication from the DPU is "about right."
- The most common methods of receiving information from the DPU among residential customers were bill inserts (63.0%) and email (37.0%), while one-half (50.5%) preferred bill inserts and nearly one-half (45.8%) preferred email for receiving information about the DPU.
- Among commercial customers, the most common method of receiving information was mail (46.2%), but over one-half (56.4%) preferred email.
- Over two-fifths of both residential (42.3%) and commercial customers (47.5%) were aware of the Los Alamos Now app, an increase for residential customers compared to 2025 (+6.2 percentage points). Among app users, 70.7% of residential and 100.0% of commercial customers reported being satisfied with their experience. Further, over seven-out-of-ten residential (70.7%) and all commercial customers (100.0%) reported being either "very" or "somewhat satisfied" with the app.
- Nearly three-fifths of residential (58.5%) and one-half of commercial customers (50.0%) reported using the Bill and Payment Portal, a slight increase for residential customers (+1.9 percentage points), but a decrease for commercial customers (-11.9 percentage points).

Environmental Sustainability

- Over two-thirds of residential (69.0%) and three-quarters of commercial (75.0%) customers would support the DPU taking on the objective to "reduce potable water use by 12% from 143 gallons per capita per day, to 126 gallons per capita per day by 2030."
- Over one-half of residential customers (54.5%) would **not** support the DPU "supporting phase-out of natural gas service by 2070 with at least a 10% reduction in usage by 2030," although over two-thirds of commercial customers (66.7%) would support this initiative.

Satisfaction with Services

Satisfaction | Organizational Characteristics

When rating the DPU on a series of organizational characteristics in 2026, residential customers provided decreased average positive ratings compared to 2025 (-2.5 percentage points), while commercial customers provided increased average positive ratings in comparison (+5.1 percentage points). This was driven by residential customers reporting lower ratings for the DPU "responding promptly to customer questions and complaints" (-6.7 percentage points). However, residential customers gave higher ratings for the DPU "helping customers conserve electricity, gas, and water" (+3.2 percentage points). Commercial customers provided higher ratings for the DPU "being transparent about company operations and policies" (+11.3 percentage points), as well as the DPU "helping customers conserve electricity, gas, and water" (+10.0 percentage points) and their "community outreach" (+10.0 percentage points).

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

	Commercial		Residential		Public Power Data Source*
	2025	2026	2025	2026	2025
Helpful and knowledgeable staff	80.0%	82.5%	82.0%	77.8%	67.1%
Communicating with customers	75.0%	80.0%	76.7%	75.3%	63.5%
Responding promptly to customer questions and complaints	73.7%	79.5%	78.7%	72.0%	65.9%
Overall satisfaction with DPU	85.7%	82.5%	76.8%	71.8%	70.2%
Community outreach	61.1%	71.1%	71.0%	71.5%	59.9%
Providing good service and value for the cost of the service	76.2%	75.0%	70.2%	67.0%	62.6%
Helping customers conserve electricity, gas, and water	50.0%	60.0%	63.7%	66.9%	54.5%
Being transparent about company operations and policies	65.0%	76.3%	63.6%	60.3%	61.7%
Average	70.8%	75.9%	72.8%	70.3%	63.2%

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," "poor customer service / support," and "billing issues."

Among the few dissatisfied commercial customers, reasons cited were "billing issues" and "multiple reasons" by two (2) customers.

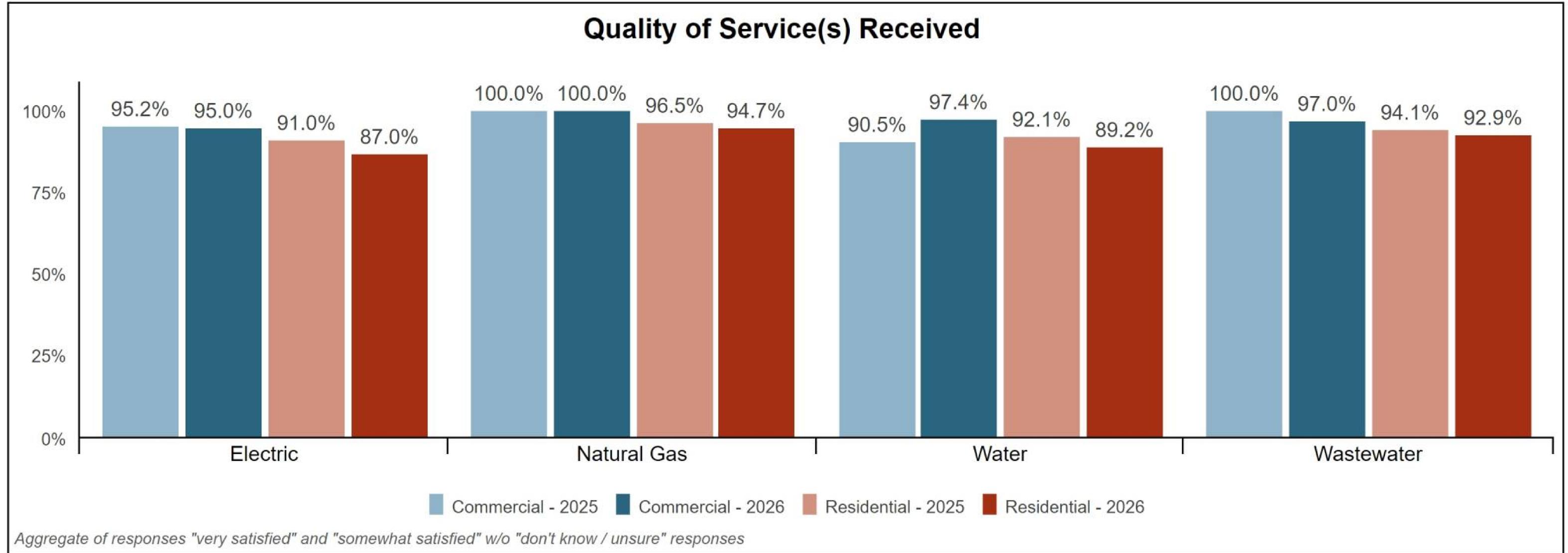
Reasons for Poor Rating	2026	
	Commercial	Residential
Sample size	3	110
Cost / too expensive	0	40
Expressed multiple reasons	1	9
Poor customer service / support	0	7
Billing issues	1	7
No community outreach	0	6
Poor communication / lack of information / not responsive	0	5
Grid / infrastructure needs updating	0	4
No outage notification system	0	3
Provide more renewable energy options	0	3
Need to provide conservation tips	0	2

Top 10 residential responses shown

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

Satisfaction | Quality of Services Received

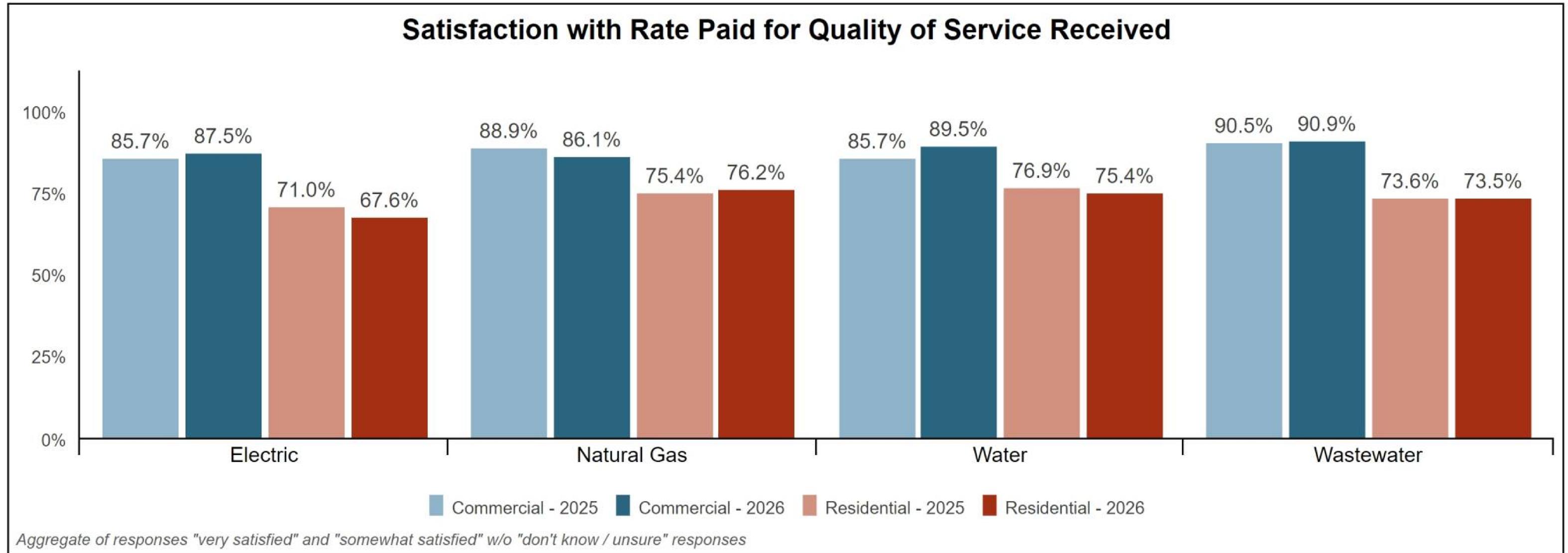
In 2026, more than 85.0% of surveyed residential and commercial customers were satisfied with the **quality** of all services received from the DPU. However, residential customers reported lower satisfaction ratings for the quality of electric and water services compared to 2025 (-4.0 and -2.9 percentage points, respectively). Notably, all surveyed commercial customers reported being satisfied with the quality of natural gas services they received from the DPU, while an increased frequency of commercial customers reported being satisfied with the quality of water service (+6.9 percentage points).



Electric: n=392 residential, n=40 commercial ; Natural Gas: n=374 residential, n=36 commercial ; Water n=379 residential, n=38 commercial; Wastewater n=350 residential, n=33 commercial
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

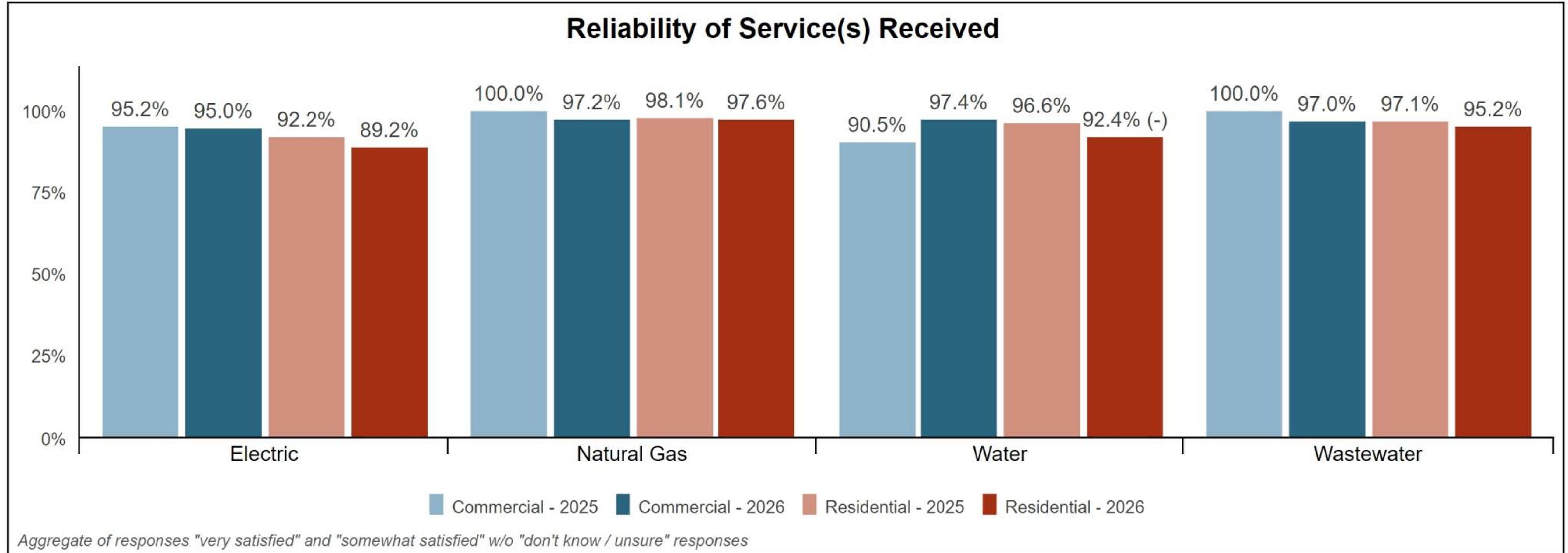
Among residential customers, satisfaction with the **price paid for the quality** of the DPU's wastewater, natural gas, and water services remained consistent, while satisfaction with the price paid for the electric service quality received was slightly lower compared to 2025 (-3.4 percentage points). Notably, a slightly higher percentage of commercial customers reported being satisfied with the price paid for the quality of water services received from the DPU (+3.8 percentage points).



Electric: n=386 residential, n=40 commercial ; Natural Gas: n=369 residential, n=36 commercial ; Water n=374 residential, n=38 commercial; Wastewater n=351 residential, n=33 commercial
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?

Satisfaction | Reliability of Services Received

Approximately nine-out-of-ten or more residential customers reported satisfaction with the **reliability** of all services they received in 2026, with nearly all reporting satisfaction with the reliability of the DPU's natural gas and wastewater service. However, significantly fewer residential customers were satisfied with the reliability of the water service they received compared to 2025 (-4.2 percentage points). Similarly, over nine-out-of-ten commercial customers reported being satisfied with the reliability of all services they received, with more commercial customers reporting satisfaction with the reliability of water service compared to 2025 (+6.9 percentage points).



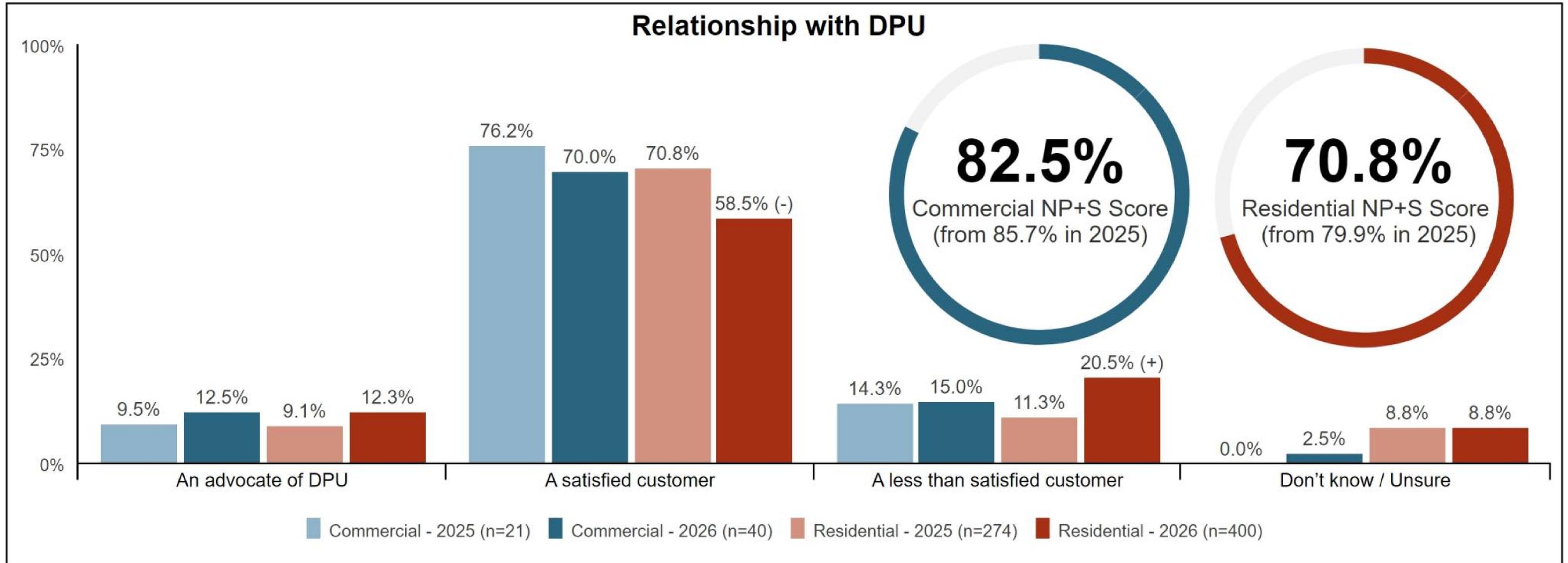
Electric: n=398 residential, n=40 commercial ; Natural Gas: n=379 residential, n=36 commercial ; Water n=384 residential, n=38 commercial; Wastewater n=352 residential, n=33 commercial

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

(+/-) indicate statistical significance at a 95% confidence level compared to the 2025 survey.

Satisfaction | NP+S Score

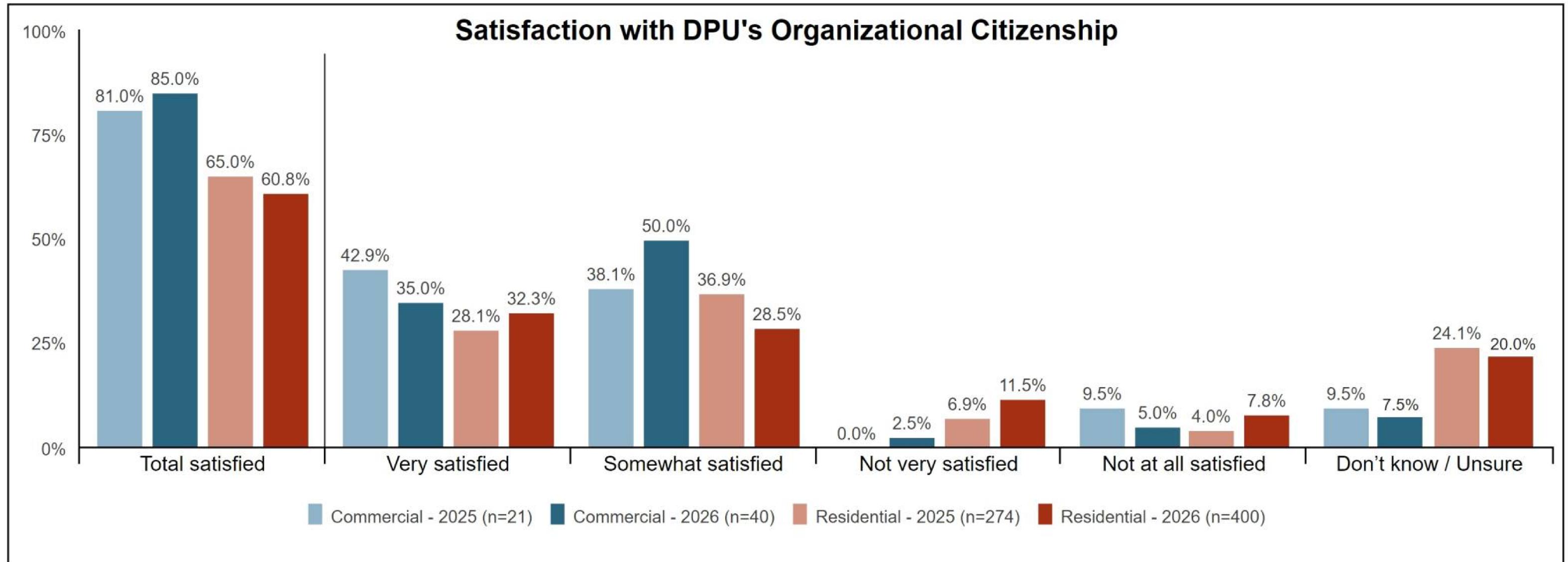
In 2026, the DPU scored a lower net positive rating (satisfied customers + advocates) among residential customers (70.8% from 79.9% in 2025), which was largely due to a significant increase in residential customers self-reporting as "a less than satisfied customer" compared to 2025 (+9.2 percentage points) as opposed to being a "satisfied customer" (-12.3 percentage points). Similarly, the DPU scored a slightly lower net positive rating among commercial customers as well (82.5% from 85.7% in 2025), with fewer commercial customers self-reporting as a "satisfied customer" (-6.2 percentage points).



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

Satisfaction | Organizational Citizenship

Three-fifths of residential customers (60.8%) and over eight-out-of-ten commercial customers (85.0%) reported being either "very satisfied" or "somewhat satisfied" with the DPU's organizational citizenship, marking a decrease in satisfaction among residential customers (-4.2 percentage points). However, nearly one-third of residential customers were "very satisfied" with the DPU's organizational citizenship, an increase compared to 2025 (+4.2 percentage points). Of note, one-fifth of residential customers reported being unsure of their satisfaction with the DPU's organizational citizenship.

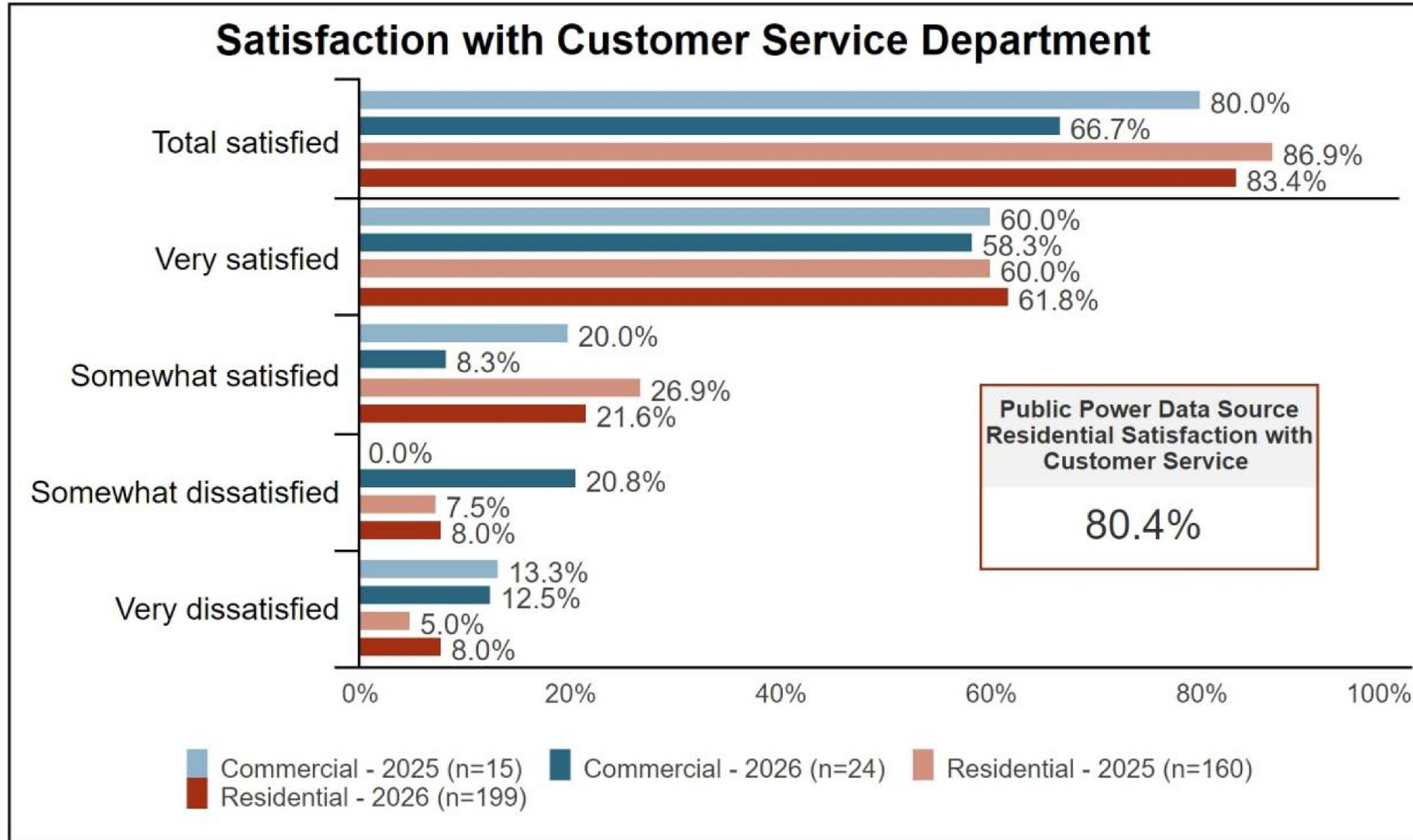


Q: How satisfied are you with DPU's organizational citizenship? In other words, how satisfied are you that DPU is environmentally, socially, and financially responsible?

Customer Service

Customer Service | Satisfaction & Purpose of Contact

Among residential customers who have contacted the DPU in the last 12 months, this was primarily for a "water service problem," a "billing question," or a "trash or recycling concern," while nearly one-half of commercial customers reported contacting the DPU for a "billing question." Among these residential customers, customer service satisfaction ratings declined slightly in 2026 (-3.5 percentage points), although over eight-out-of-ten surveyed residential customers reported being satisfied with the service provided by the customer service department. Customer service satisfaction ratings declined for commercial customers as well in 2026 (-13.3 percentage points), with two-thirds of commercial customers reporting satisfaction.



Purpose of Contact	2026	
	Commercial	Residential
Sample size	24	199
Water service problem, question, issue, or concern	20.8%	23.6%
Billing question	45.8%	23.1%
Trash or recycling concern	0.0%	20.1%
Move in/out	4.2%	14.6%
Other	8.3%	13.1%
Sewer service problem, question, issue, or concern	4.2%	12.6%
Payment or pay arrangement	0.0%	12.1%
Electric service problem, question, issue, or concern	8.3%	12.1%

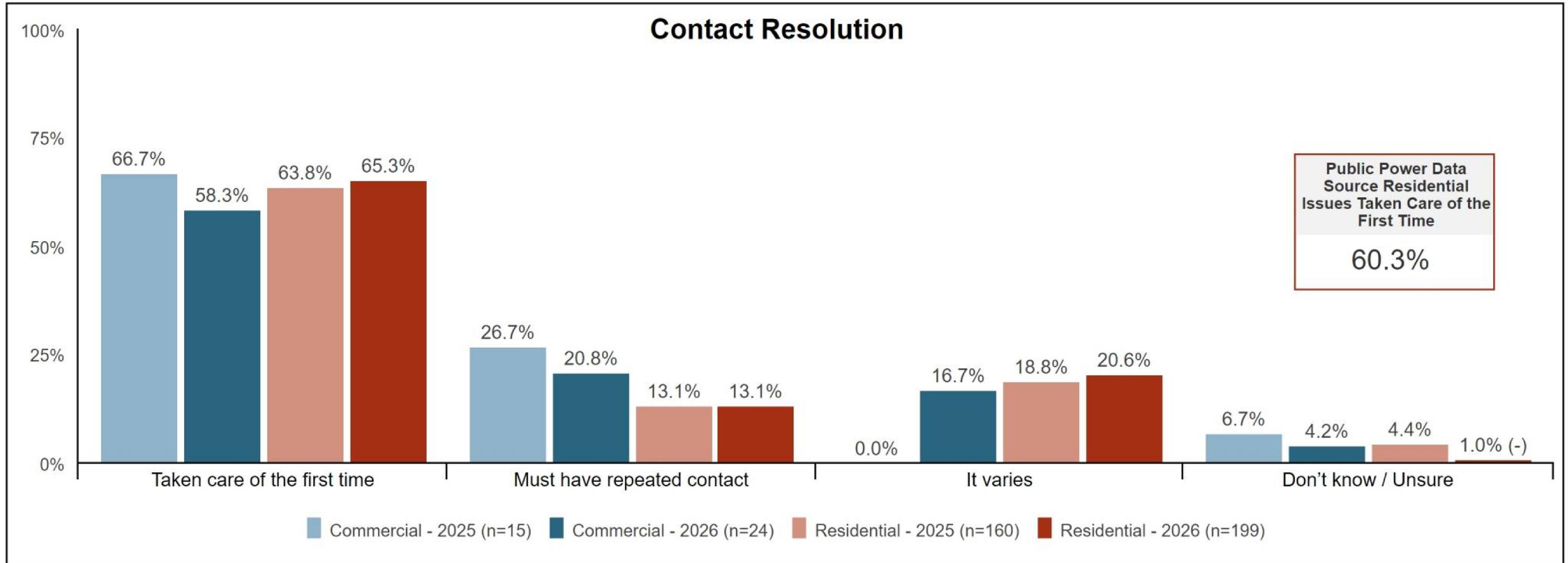
Top 8 responses shown

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

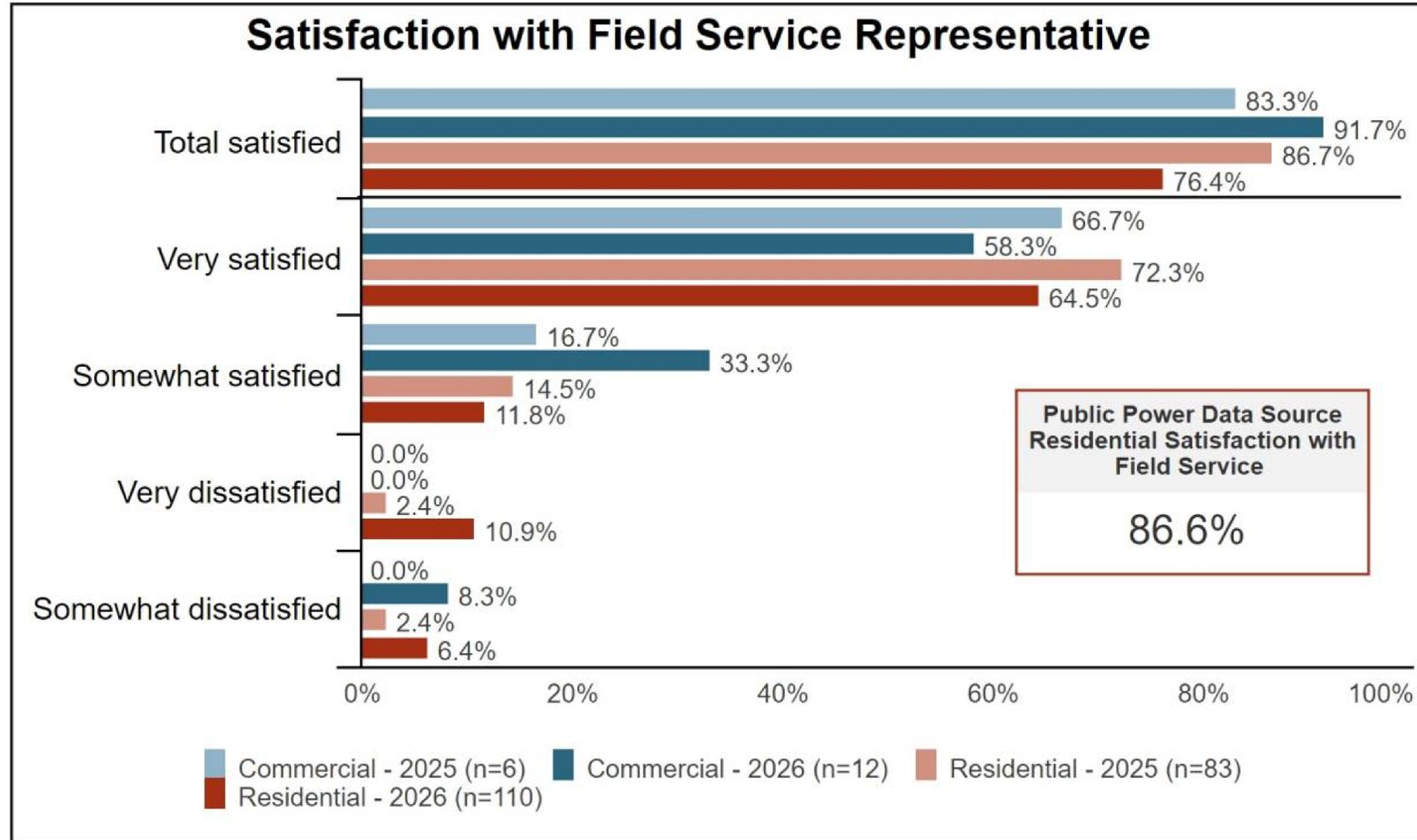
Nearly two-thirds of residential customers and nearly three-fifths of commercial customers indicated their questions or issues were "taken care of the first time" when they contacted the DPU. Of note, a decreased percentage of commercial customers indicated their issue was resolved the first time compared to 2025 (-8.4 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 among commercial customers (+8.4 percentage points), with over nine-out-of-ten commercial customers reporting satisfaction in 2026. However, residential customers reported decreased satisfaction with the DPU's field representatives (-10.3 percentage points), with just over three-quarters of customers reporting satisfaction. Among those customers who indicated a field representative visited their home or business in the last 12 months, the most common reason among residential customers was for a miscellaneous reason not listed in the survey or a "meter reading," while over nine-out-of-ten commercial customers had a "service problem/repair."



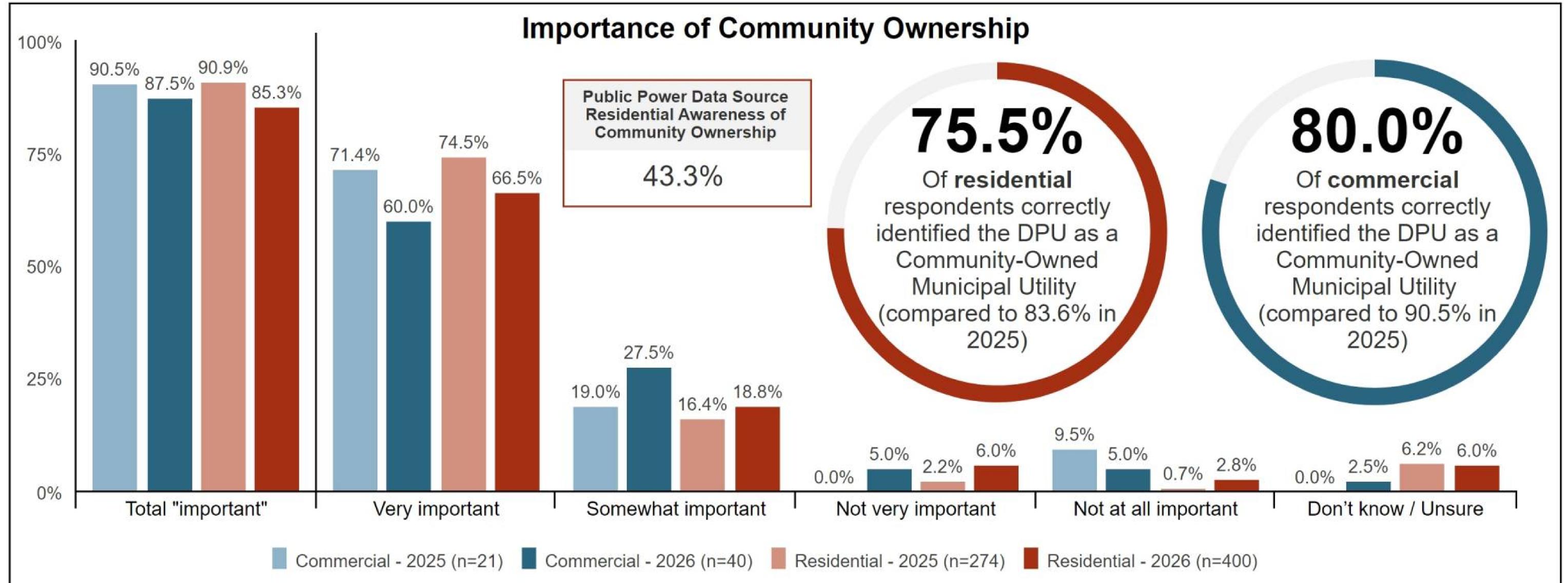
Purpose of Visit	2026	
	Commercial	Residential
Sample size	12	110
Other	0.0%	41.8%
Meter reading	8.3%	34.5%
Service problem/repair	91.7%	32.7%
Outage restoration	0.0%	3.6%

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

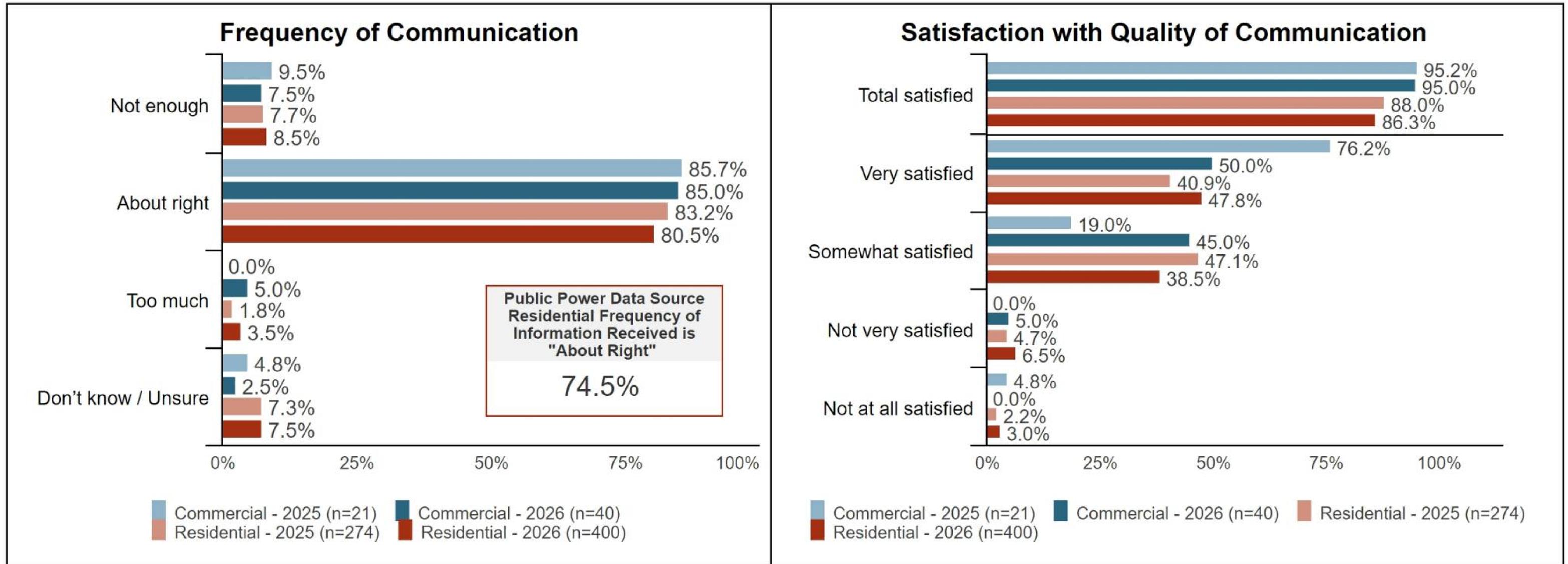
Three-quarters of residential customers and four-fifths of commercial customers correctly identified the DPU as a Community-Owned Municipal Utility. Of note, awareness that the DPU is community-owned declined among both residential (-8.1 percentage points) and commercial (-10.5 percentage points) customers in 2026. Additionally, over eight-out-of-ten residential customers and commercial customers indicated it is either "very important" or "somewhat important" to maintain local control of their municipal utility, although perceived importance decreased for both residential and commercial audiences (-5.6 and -3.0 percentage points, respectively).



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 | Satisfaction with Frequency & Quality

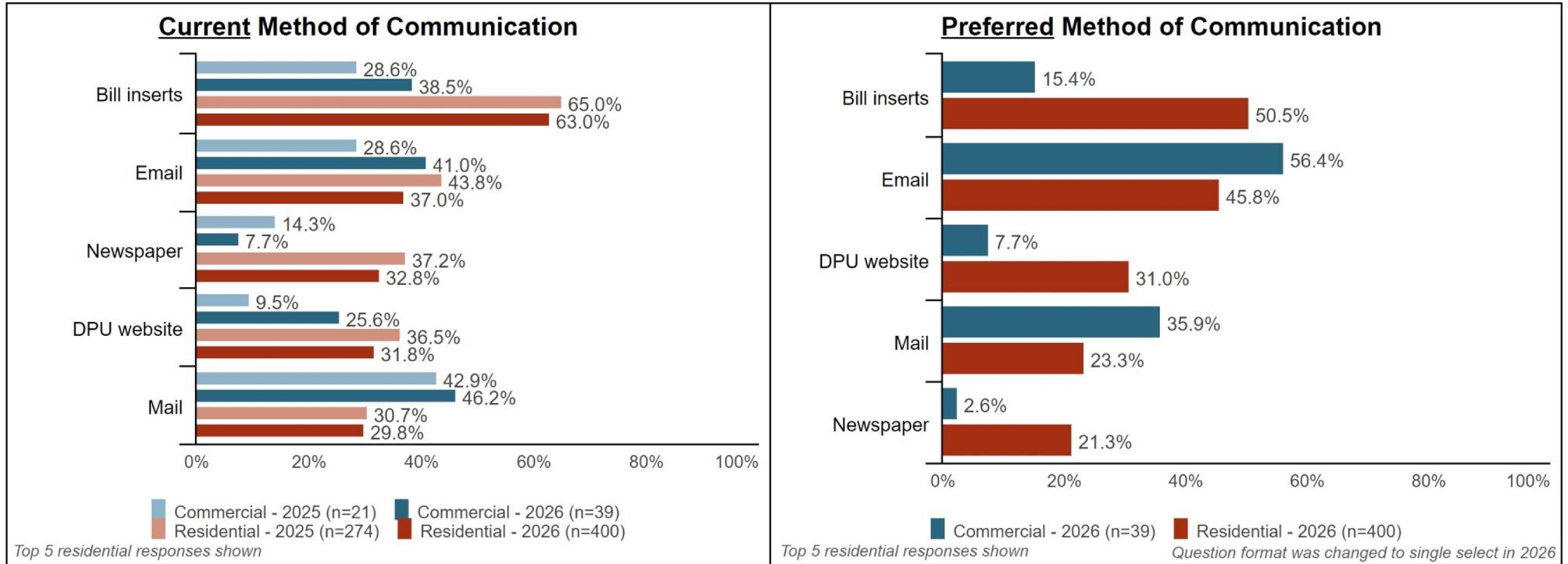
Four-fifths of both residential and commercial customers indicated the frequency at which they receive information from the DPU is "about right." Similarly, a majority of residential and commercial customers reported being satisfied with the quality of communication they receive from the DPU, with more residential customers being "very satisfied" with the communication they receive from the DPU compared to 2025 (+6.9 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 | Current Vs. Preferred Methods

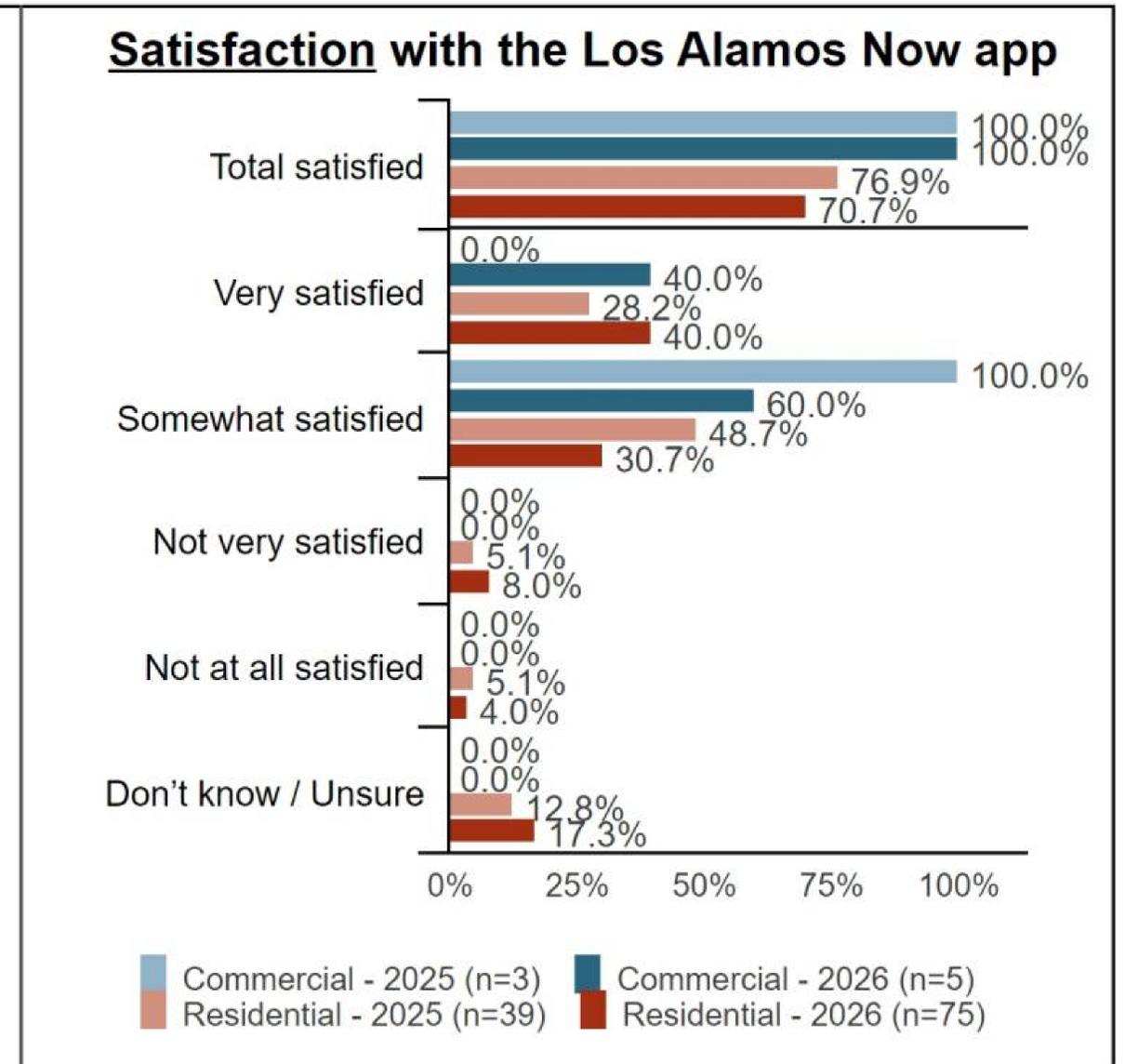
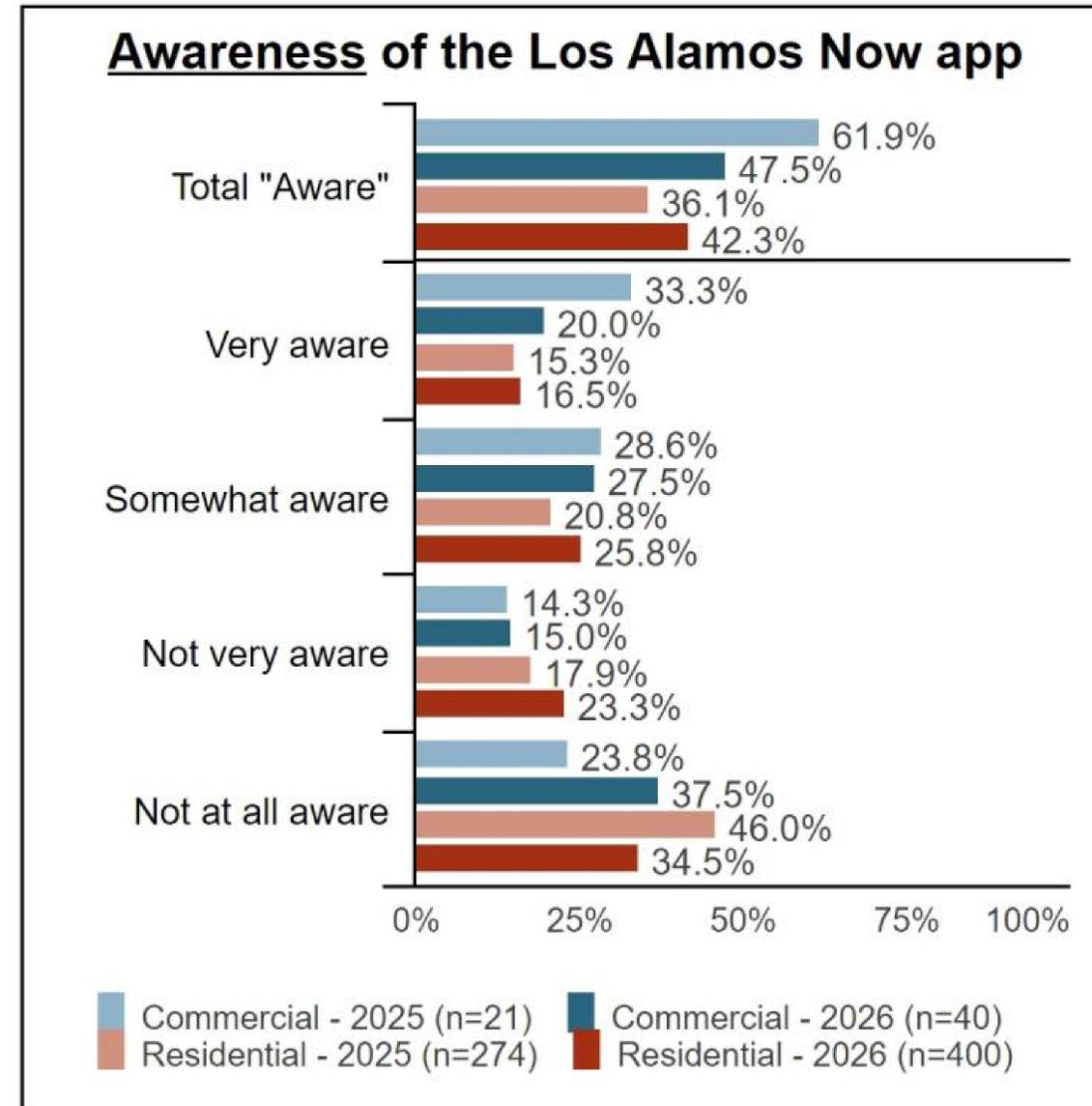
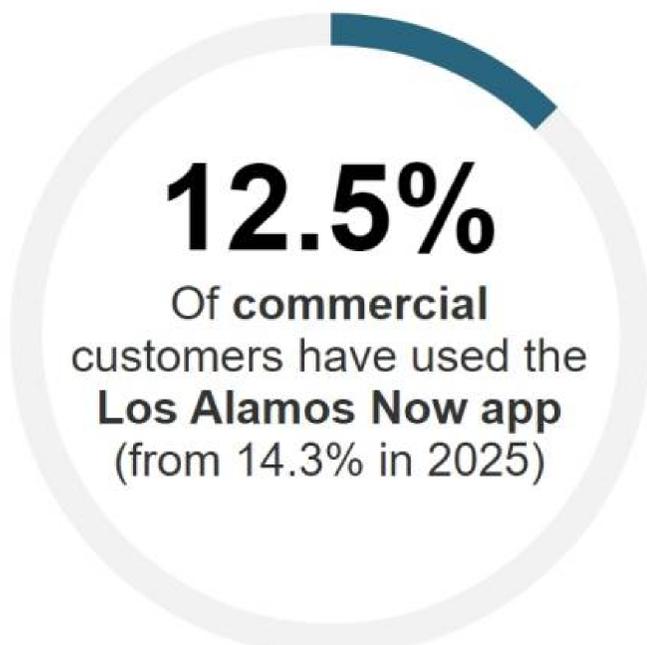
The most common methods of receiving information among residential customers, by a significant margin, were "bill inserts," followed by "email," with one-half of surveyed residential customers **preferring** to receive information about the DPU through "bill inserts," and nearly one-half preferring to receive this information through "emails." Among commercial customers, the most common method of receiving information was through the "mail," followed by "email" and "bill inserts," while over 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.

Communication | Satisfaction with Los Alamos Now App LOS ALAMOS where discoveries are made

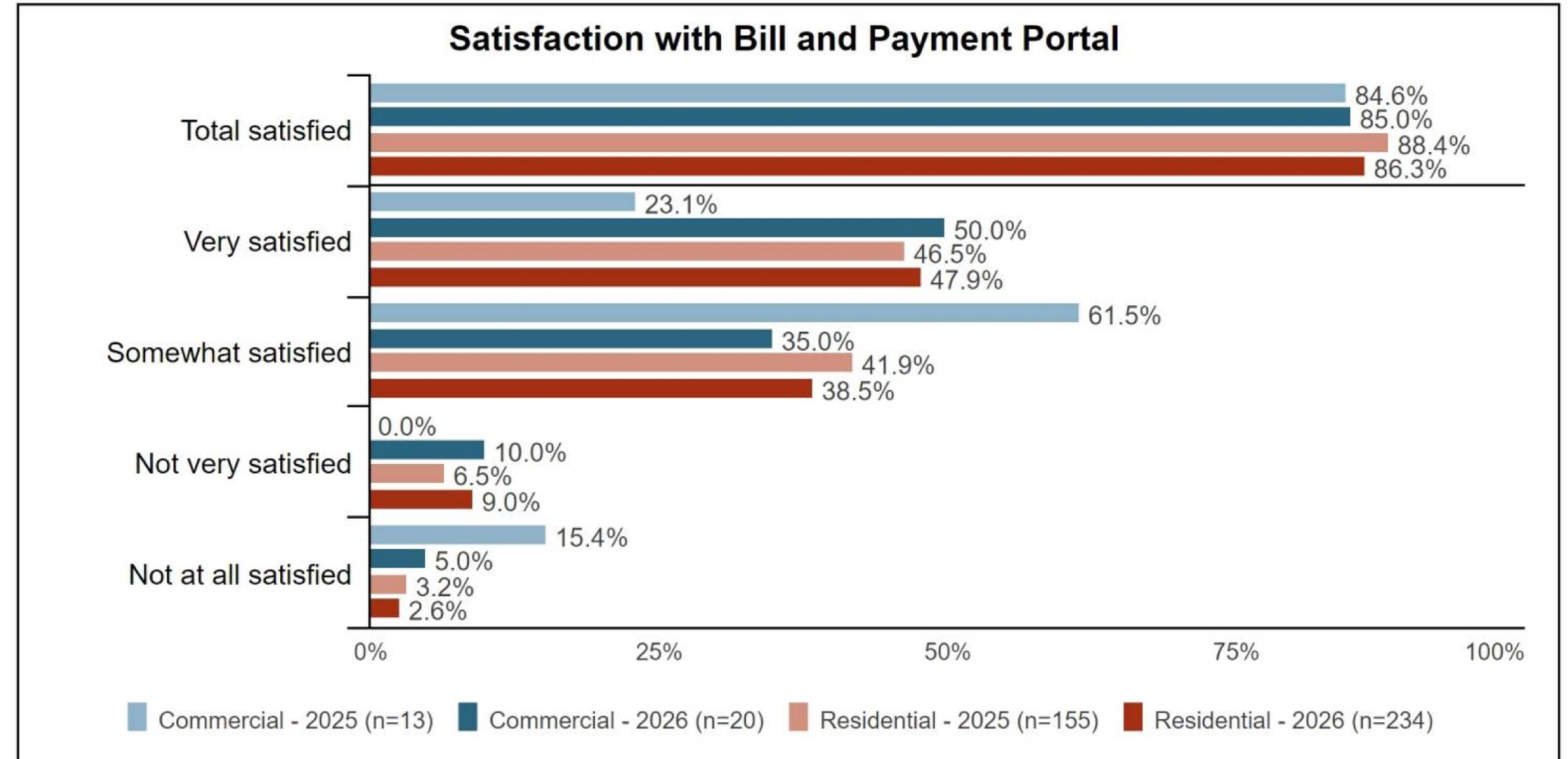
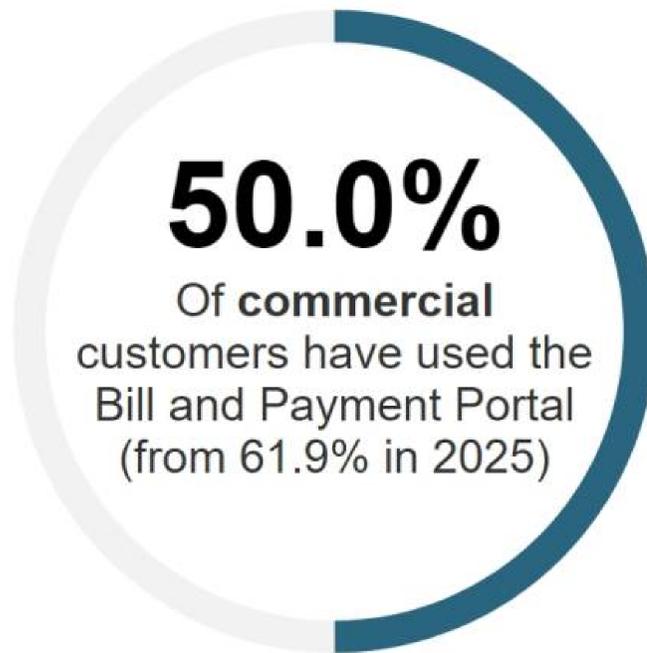
Over two-fifths of both residential and commercial customers were aware of the *Los Alamos Now* app, an increase for residential customers compared to 2025 (+6.2 percentage points), but a decrease among commercial customers (-14.4 percentage points). Among customers who have used the app, over seven-out-of-ten residential 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)

Communication | Satisfaction with Bill & Payment Portal LOS ALAMOS where discoveries are made

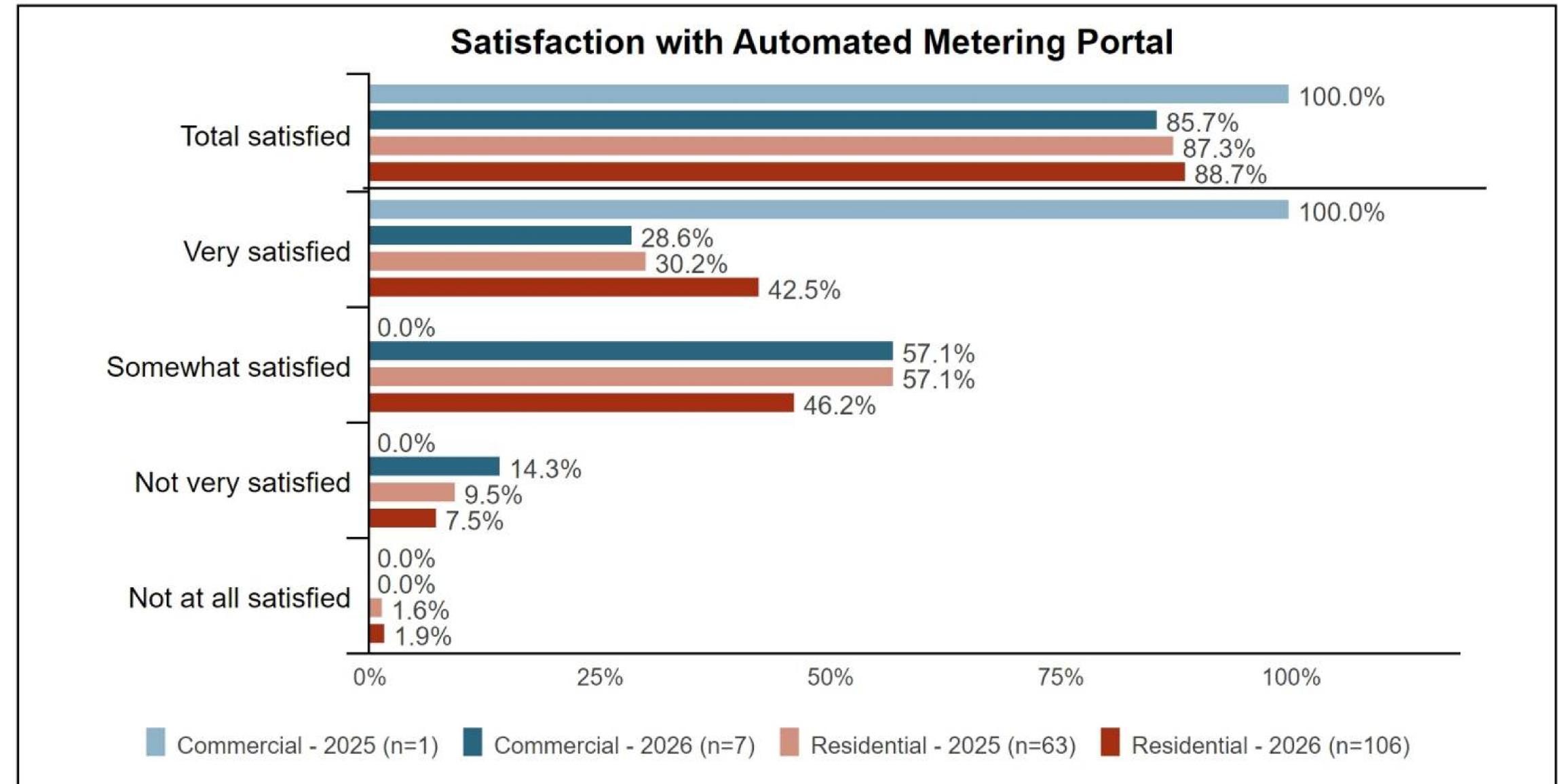
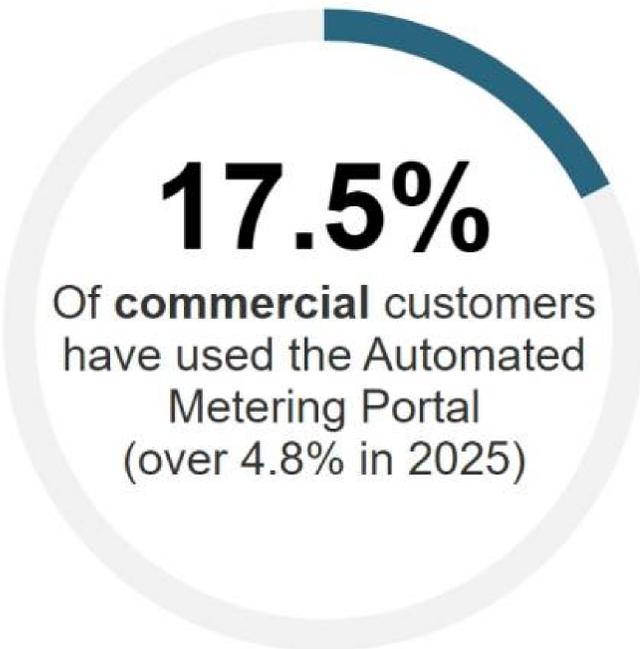
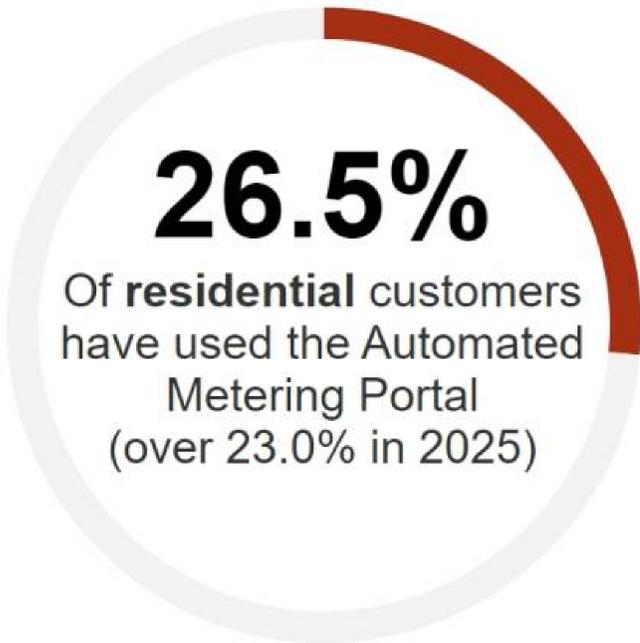
Nearly three-fifths of residential and one-half of commercial customers reported using the Bill and Payment Portal, a slight increase for residential customers (+1.9 percentage points), but a decrease among commercial customers (-11.9 percentage points). Among those respondents who have used the Bill and Payment Portal, over four-fifths of both customer bases reported being satisfied with their experience using the portal, while satisfaction decreased slightly among residential customers (-2.1 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)

Communication | Satisfaction with Automated Metering Portal LOS ALAMOS where discoveries are made

Over one-quarter of residential and nearly one-fifth of commercial customers reported using the Automated Metering Portal, an increase for both residential and commercial customers compared to 2025 (+3.5 and +12.7 percentage points, respectively). Of those customers, nearly nine-out-of-ten residential and commercial customers 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)

Environmental Sustainability

Sustainability | Support for DPU Initiatives

Over two-thirds of residential and three-quarters of commercial customers would either "strongly support" or "somewhat support" the DPU taking on the objective to "reduce potable water use by 12% from 143 gallons per capita per day, to 126 gallons per capita per day by 2030." Conversely, over one-half of residential customers would either "strongly oppose" or "somewhat oppose" the DPU "supporting phase-out of natural gas service by 2070 with at least a 10% reduction in usage by 2030," although over two-thirds of commercial customers would support the initiative.

Level of Support for DPU Environmental Sustainability Initiatives

	Total "Support"		Total "Oppose"	
	Commercial	Residential	Commercial	Residential
Reduce potable water use by 12% from 143 gallons per capita per day, which is the 2020 calendar baseline, to 126 gallons per capita per day by 2030	75.0%	69.0%	25.0%	31.0%
Be a net carbon-neutral electric provider by 2040	82.9%	64.7%	17.1%	35.3%
Support phase-out of natural gas service by 2070 with at least a 10% reduction in usage by 2030 as measured by annual therms per heating degree day compared to a 2016-2020 average	66.7%	45.5%	33.3%	54.5%

Without "don't know" responses

Residential n=400, Commercial n=40

Q: The DPU has a goal to continuously, conscientiously work toward environmental sustainability. For each of the three following objectives, please tell us your level of support.

Considerations



Strengthen Perceived Value to Improve Customer Sentiment

The slight decline in the 2026 NP+S suggests an opportunity to strengthen customers' overall perception of value, particularly among residential customers. Lower ratings for responsiveness to questions and complaints, along with cost and billing concerns among dissatisfied customers, indicate that both service experience and cost perceptions could be influencing sentiment. At the same time, increased satisfaction with the DPU's efforts to help customers conserve electricity, gas, and water, among both residential and commercial customers, as well as strong support for water conservation initiatives, highlight an area of positive momentum. Customers may be more receptive to value-based messaging when it is tied to tangible benefits such as cost savings and resource efficiency. Aligning service improvements with clearer communication of value can help reinforce customer satisfaction and support stronger advocacy.

Actionable Insights

- Improve responsiveness to customer questions and complaints by evaluating response time standards, as well as training customer service employees to be better equipped to resolve issues on first contact, if not already doing so.
- Strengthen messaging that connects conservation efforts to direct customer benefits, such as cost savings and long-term rate stability.
- Incorporate conservation achievements and program impacts into regular communications to reinforce the value customers receive.
- Explore opportunities to bundle service improvements and conservation initiatives into a cohesive "value narrative" to better justify pricing and overall service quality.



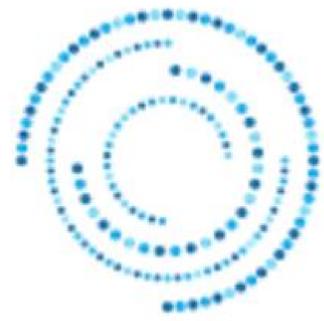
Align Environmental Initiatives with Customer Priorities

Customer feedback on environmental initiatives reveals a clear divergence in support, particularly between residential and commercial customers. While there is broad support for water conservation goals, opposition to natural gas phase-out efforts among residential customers is notably high. In contrast, commercial customers show stronger alignment with these long-term sustainability goals. These findings suggest that while customers may support sustainability in principle, specific initiatives, especially those perceived as disruptive, require clearer communication from the DPU. Proactively addressing these concerns will be critical to building a broader consensus and minimizing resistance as the DPU advances its environmental goals in the future.

Actionable Insights

- Develop targeted education campaigns that clearly explain the timeline and customer impact of phasing out natural gas service.
- Emphasize cost implications, reliability considerations, and available support programs to address key residential concerns
- Continue promoting water conservation efforts as a "low-resistance" entry point to build broader trust and engagement in sustainability initiatives

About GreatBlue



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.”

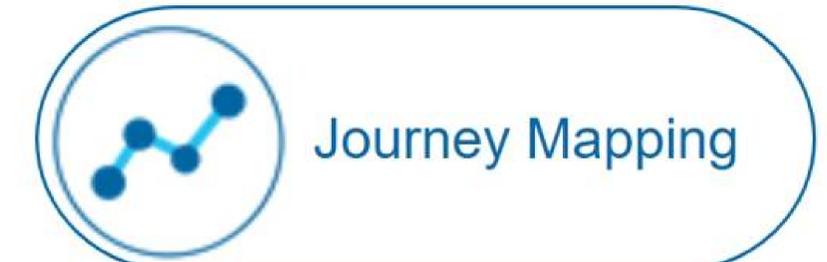
 **Talent** with a knowledge base in a wide range of industries and methodologies ensures a 360° view of the challenges faced and the expertise to address them.

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

Methodologies:



Studies:



Michael Vigeant CEO

MJV@GreatBlueResearch.com

Chris Biggs SVP, Research & Strategy

Chris@GreatBlueResearch.com

Seamus McNamee VP, Research

Seamus@GreatBlueResearch.com

Courtney Moore Insights Manager

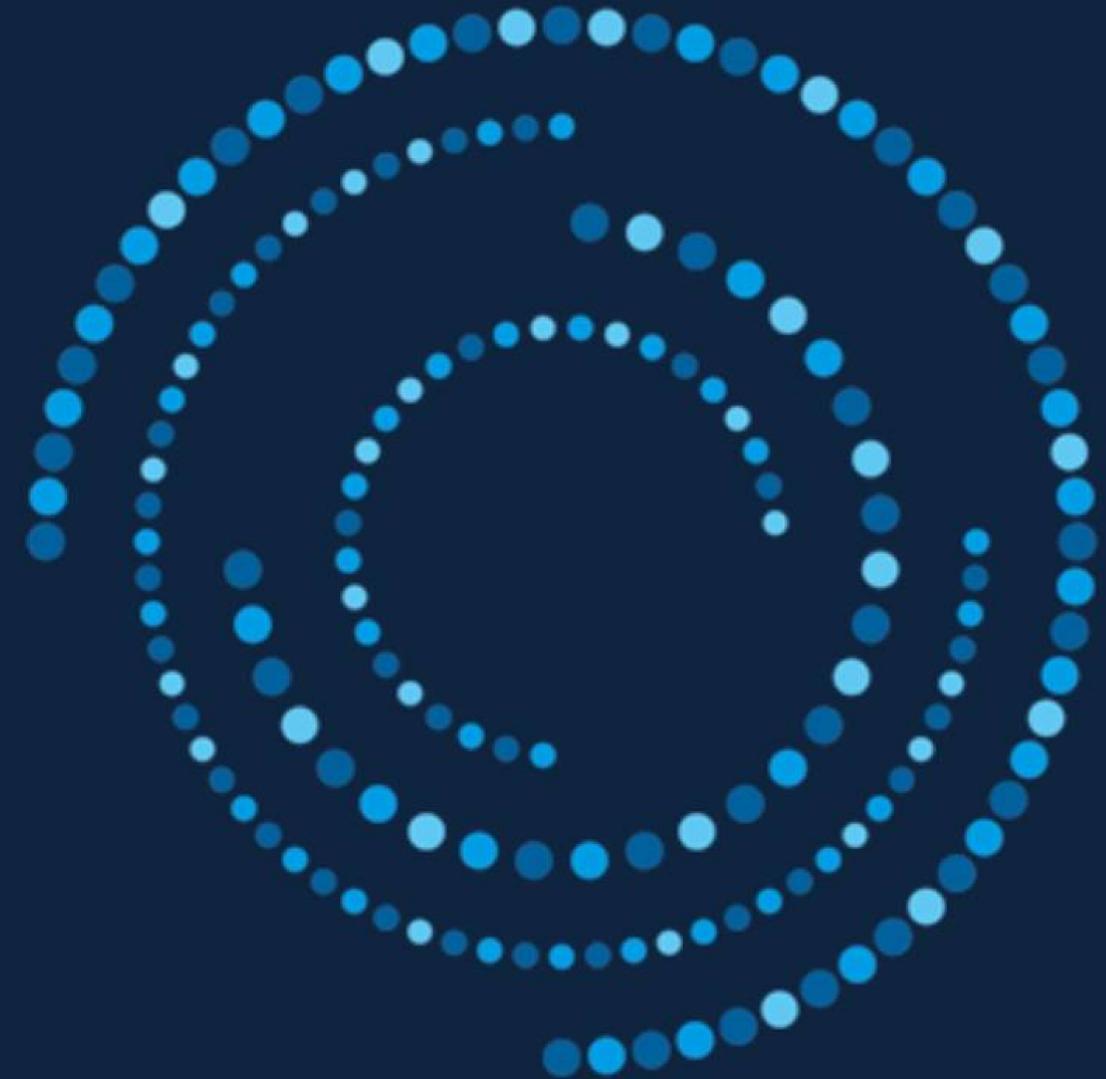
Courtney@GreatBlueResearch.com

Catherine Vollmer 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