

## Business & Key Account Customer Satisfaction Study 2024 Electric



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**About GreatBlue** 

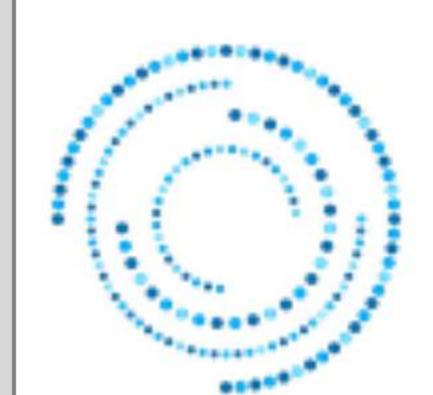
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## Harnessing the Power of Data

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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."



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#### Methodologies:





#### Studies:









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## Project Overview

#### Research Objectives

- GreatBlue Research was commissioned by the California Municipal Utilities Association (hereinafter "CMUA") to conduct comprehensive research among business and key account customers to gain a deeper understanding of their perceptions of the utility and satisfaction with the services provided.
- The primary goals of this research study were to assess business and key account customers' satisfaction with their electric utility, uncover perceptions of their utility, and explore their interest in various utility-related products and services.
- The outcome of this research will enable CMUA member utilities' personnel 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

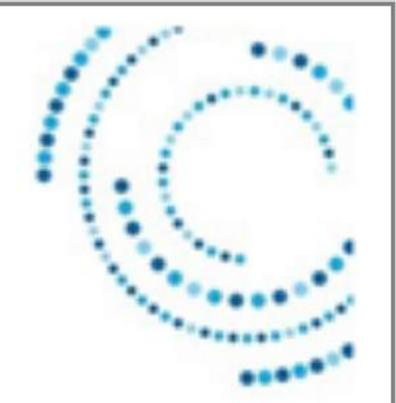
In order to service these objectives, GreatBlue developed a bespoke research study leveraging a digital survey to learn about the following topics:

- Organizational characteristic ratings
- Customer's relationship with their utility
- Satisfaction with customer service
- Assessment of key account manager
- Satisfaction with electric rates
- Interest in building and fleet electrification
- Perceived benefit of public ownership
- Preferred communication methods
- Firmographic profile of respondents





## Research Methodology Snapshot



Methodology

Digital

No. of Completes

613 (500 Muni + 113 IOU) No. of Questions

38\*

Incentive

None

Sample

Purchased by GreatBlue

**Target** 

Business and Key
Account
Customers

Quality Assurance

Dual-level\*\*

Margin of Error

+/- 3.9% (+/-4.1% muni, +/-9.2% IOU) Confidence Level

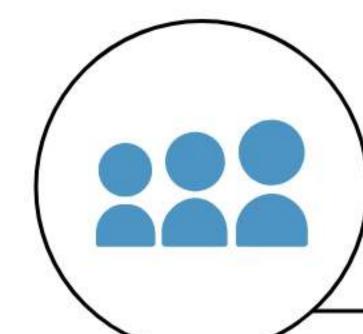
95%

Research Dates

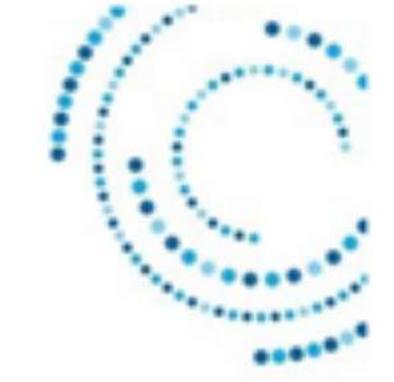
June 17 - July 26, 2024

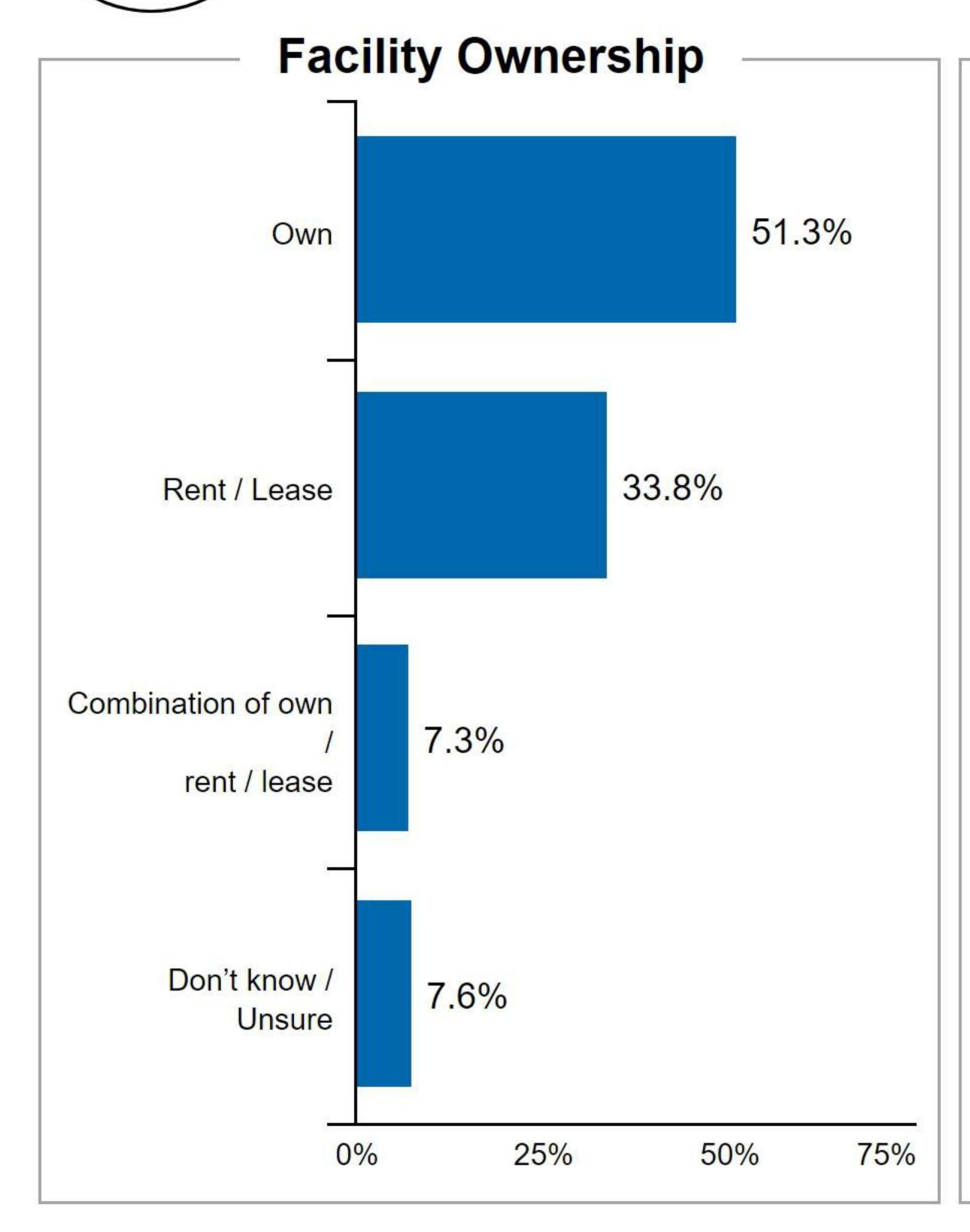
<sup>\*</sup> This represents the total possible number of questions; not all respondents will answer all questions based on skip patterns and other instrument bias.

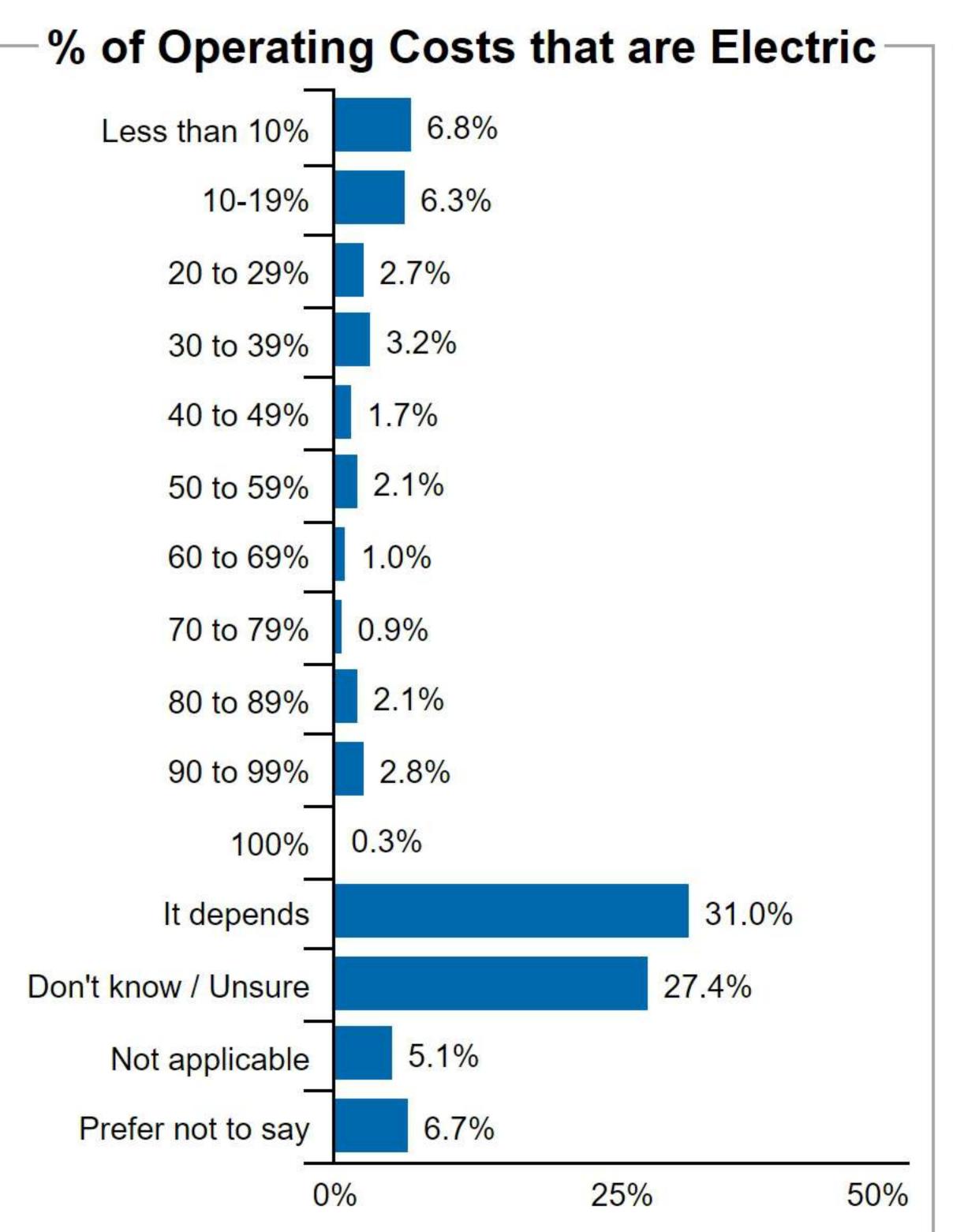
<sup>\*\*</sup> Data quality personnel, in addition to computer-aided interviewing platform, ensure the integrity of the data is accurate.

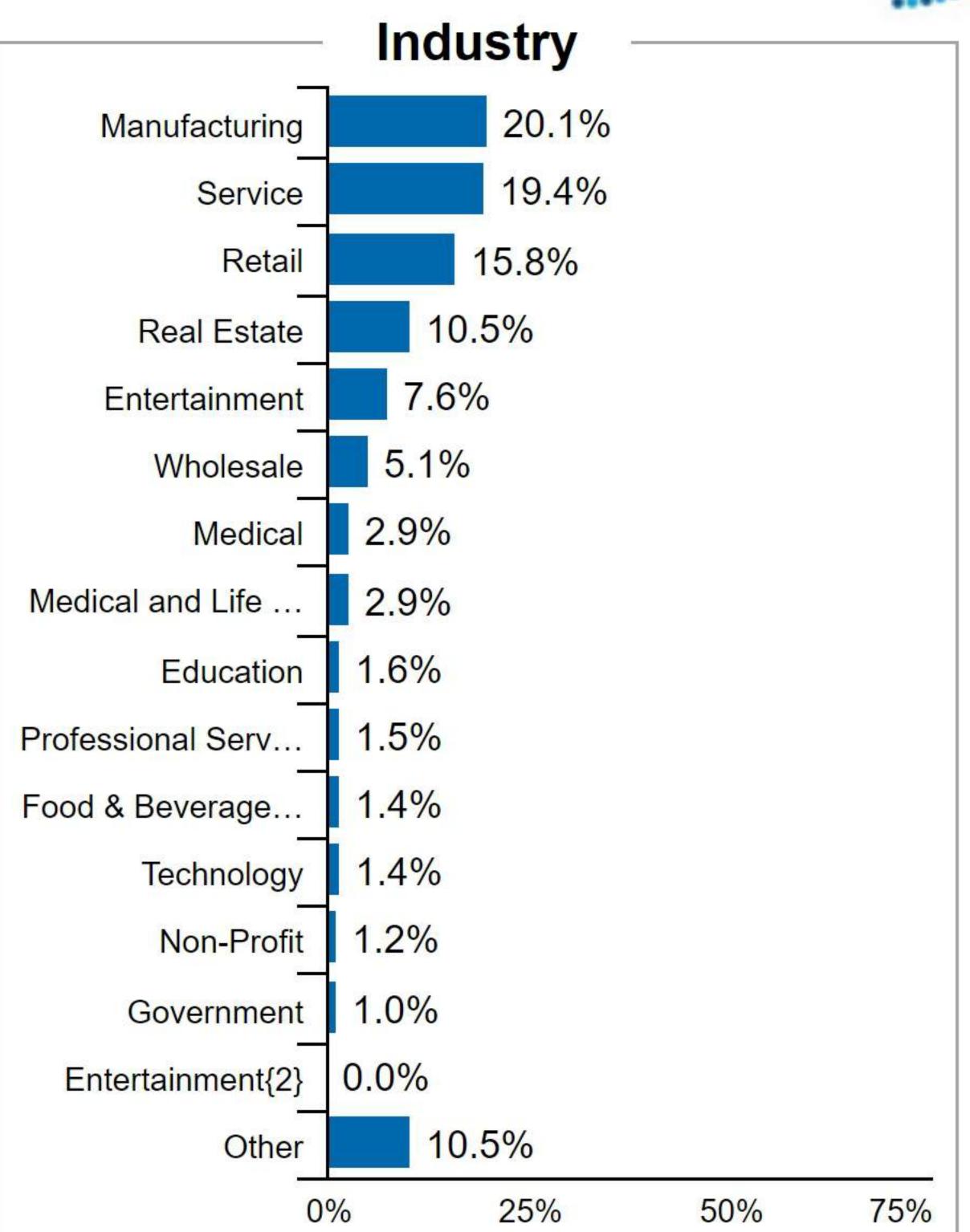


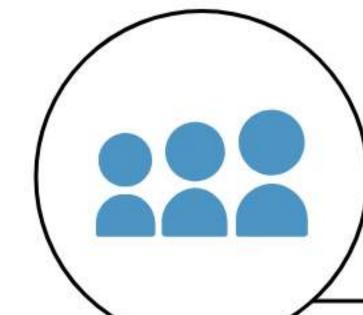
## Respondent Snapshot





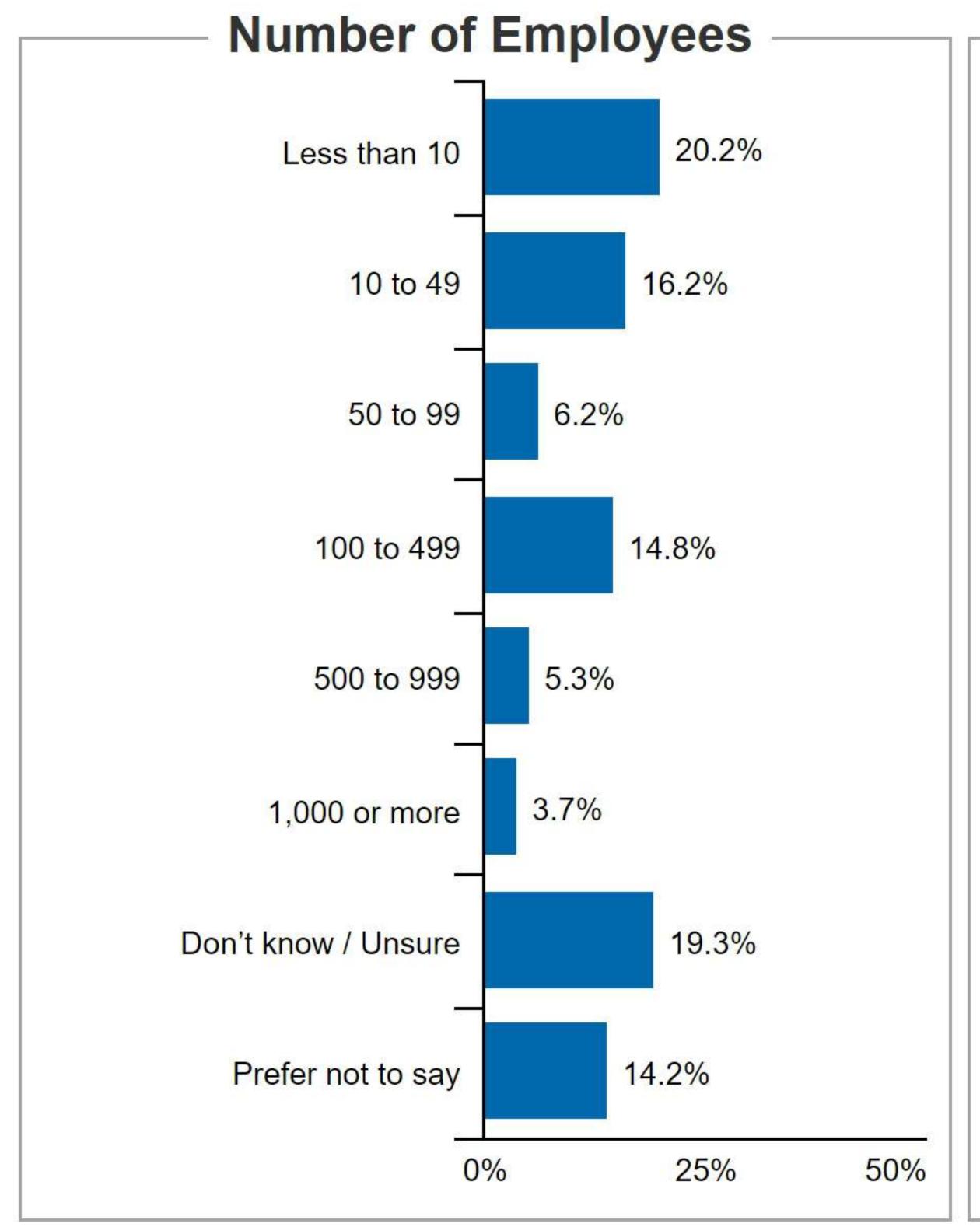


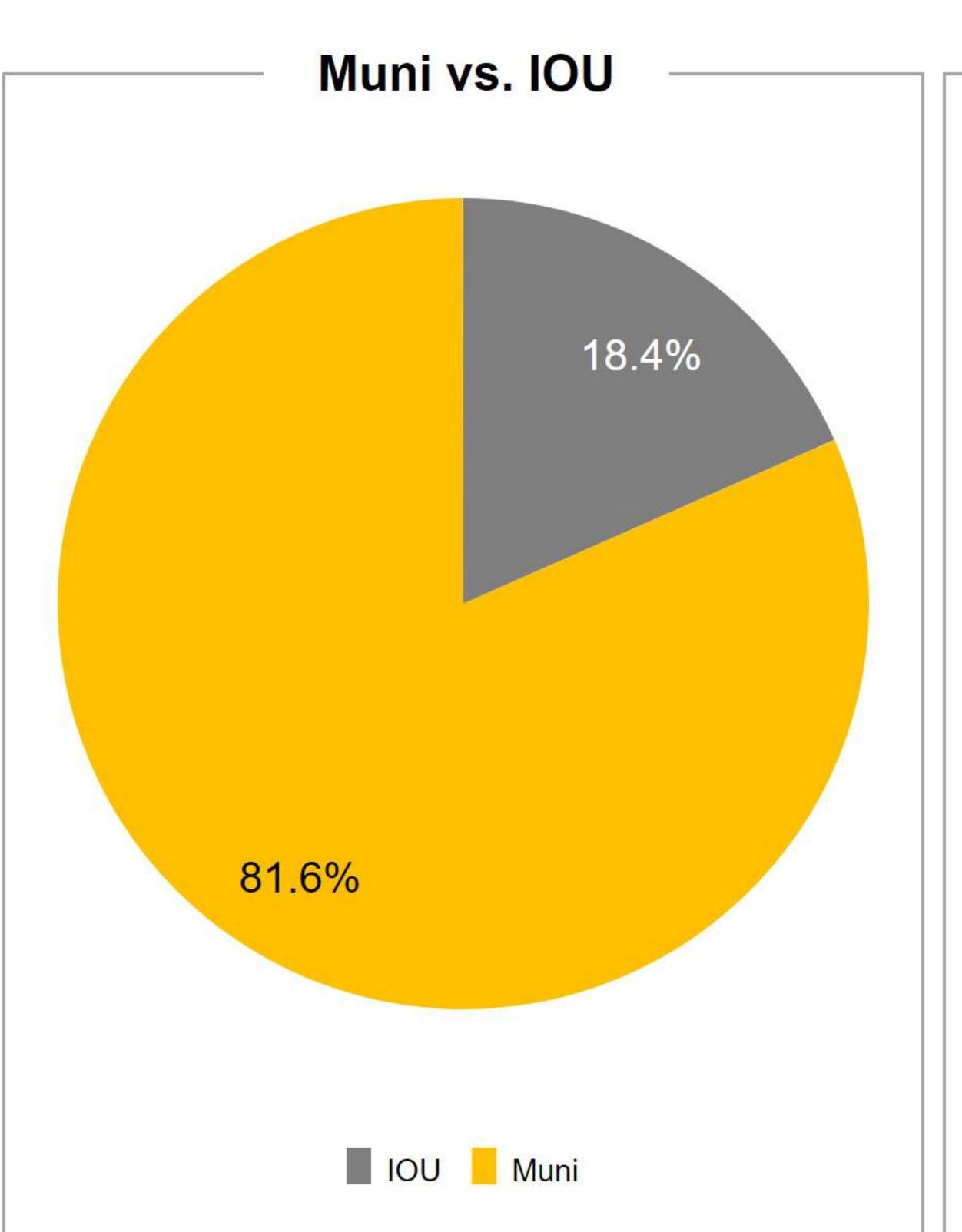




## Respondent Snapshot







#### Muni Customers by Region

37.6% North

62.4% South

## Regional Boundary and County Makeup

- Alameda
- Alpine
- Amador
- Butte
- Calaveras
- Colusa
- Contra Costa
- Del Norte
- El Dorado
- Fresno

- Glenn
- Humboldt
- Inyo
- Kings
- Lake
- Lassen
- Madera
- Marin
- Mariposa
- Mendocino

- Merced
  - Modoc
  - Mono
  - Monterey
  - Napa
  - Nevada
  - Placer
  - Plumas
  - Sacramento
  - San Benito

- San Francisco
- San Joaquin
- San Mateo
- Santa Clara
- Santa Cruz
- Shasta
- Sierra
- Siskiyou
- Solano
- Sonoma

- Stanislaus
- Sutter
- Tehama
- Trinity
- Tulare
- Tuolumne
- Yolo
- Yuba



- Imperial
- Kern Los Angeles
- Orange
- Riverside
- San Bernardino
- San Diego
- San Luis Obispo
- Santa Barbara
- Ventura



#### Guide to Footnotes

#### General

n = 362	The lowercase "n" is used to indicate the base size, or the amount of repsondents who answered a particular question.	
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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," "a loyal customer," and "a satisfied customer."

Boxes are sometimes used to emphasize particular data on a slide. The reason for use is always stated in the footnote.

Muni The abbreviation "Muni" indicates findings collected through a statewide survey of California municipal utility customers (n=500).

A subset of completed surveys from the California statewide survey among customers who are serviced by an investor-owned utility (N=113).

#### **Scale Questions**

IOU

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

#### Statistical Significance

(+/-) Indicate statistical significance at a 95% confidence level, denoting whether the data point is higher or lower than the compared subgroup

Cell color indicates statistical significance at a 95% confidence level, denoting whether the data point is higher or lower than the previous iteration of the survey.

36.2%

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## Key Study Findings



#### Satisfaction

- Over seven-out-of-ten muni respondents (71.7%) provided positive ratings for their overall satisfaction with their utility, consistent with 2022 findings (70.2%).
- Significantly more muni respondents indicated their utility is "among the best" compared to other utilities in 2024 (35.2% compared to 24.0%) in 2022.
- Nearly two-thirds of muni respondents (64.1%) indicated they think of their utility as "a valued energy partner," a significant increase over 2022 (57.5%).
- Over four-fifths of muni respondents in 2024 (85.6%) provided positive ratings for their overall satisfaction with their key account manager.
  - Significantly more muni respondents provided positive ratings across all key account manager characteristics in 2024 compared to 2022.

#### Rates

- Over three-fifths of muni respondents (62.8%) indicated they are satisfied with the price they pay for electricity.
  - Nearly three-quarters of muni respondents (73.8%) indicated they have "a great deal" or "some" trust that their utility does all it can to keep its rates affordable.

#### Electrification

- Three-fifths of muni respondents (60.6%) indicated they are "very active" when it comes to electrifying their building, while 57.8% reported the same regarding fleet electrification.
  - Significantly more muni respondents in 2024 plan to implement electrification upgrades within a year compared to 2022 (28.2% compared to 20.6%).
- Electric vehicle ownership and possession of on-site electric vehicle charging stations increased significantly from 2022 to 2024, with significantly fewer muni respondents indicating they have no company-owned electric vehicles (13.0% from 27.0%) or no on-site charging stations (16.6% from 27.6% on 2022).
  - Furthermore, electric vehicle fleet sizes are increasing, as significantly more muni respondents have 51 or more electric vehicles in 2024 (59.7% compared to 31.4% in 2022); and the number of on-site charging stations per company is increasing, as significantly more muni respondents have six (6) or more charging stations in 2024 (61.8% compared to 44.9% in 2022).

## Key Study Findings





- Significantly more muni respondents indicated they view their utility as "a valued energy partner" compared to IOU respondents (64.1% compared to 44.2%).
- Significantly more muni respondents indicated they saw their utility as "among the best" or "above average" compared to other utilities (60.8% compared to 41.6%).
- Significantly more muni respondents provided positive ratings for their satisfaction with their electric rates (62.0% compared to 43.4%) and significantly more trust their utility "does all it can to keep rates affordable" (73.8% compared to 48.7%).
- The average positive rating across several power delivery characteristics was significantly higher for municipal utilities compared to investor-owned utilities (69.6% compared to 61.4%).

#### Northern vs. Southern

- Significantly fewer Southern region muni respondents indicated their utility is "among the best" or "above average" compared to other utilities and fewer provided positive ratings for their satisfaction with their electric rates compared to Northern region muni respondents (54.8% compared to 70.7% and 58.0% compared to 68.6%, respectively).
- The average positive rating across several power delivery characteristics was significantly lower for the Southern region compared to the Northern region (66.1% compared to 75.2%).

#### **Company Size Comparison**

- Significantly fewer small businesses indicated they are "an advocate for their utility," "a loyal customer," or "a satisfied customer" compared to medium and large businesses (52.2% compared to 85.1% and 92.1%, respectively).
- Significantly fewer small businesses indicated their utility is "among the best" or "above average" compared to other utilities (65.2% compared to 78.6% and 81.0%, respectively).
- The perceived benefit of municipal ownership appears to increase as company size increases, with fewer small businesses seeing a benefit compared to large businesses (72.6% compared to 90.5%).

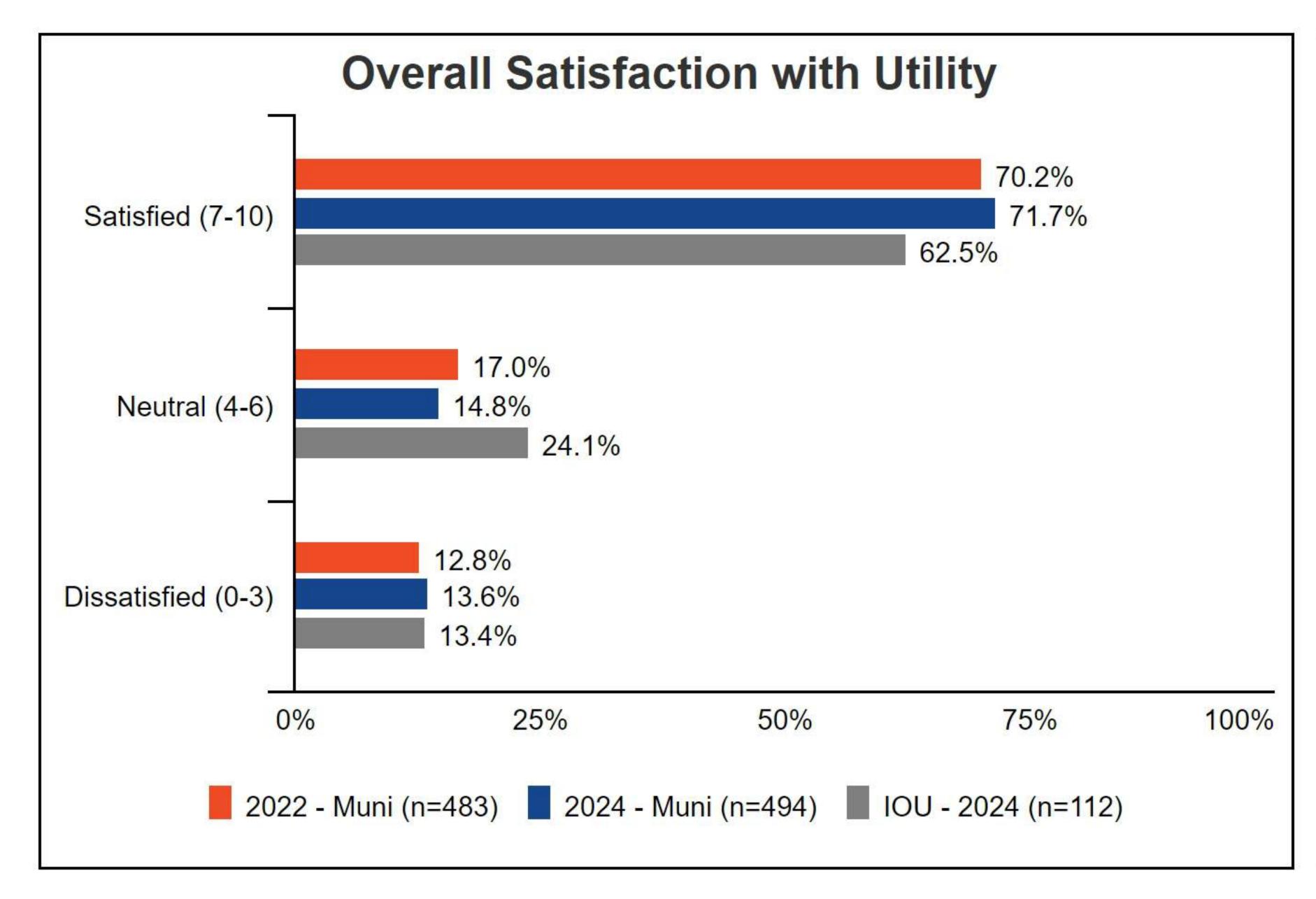


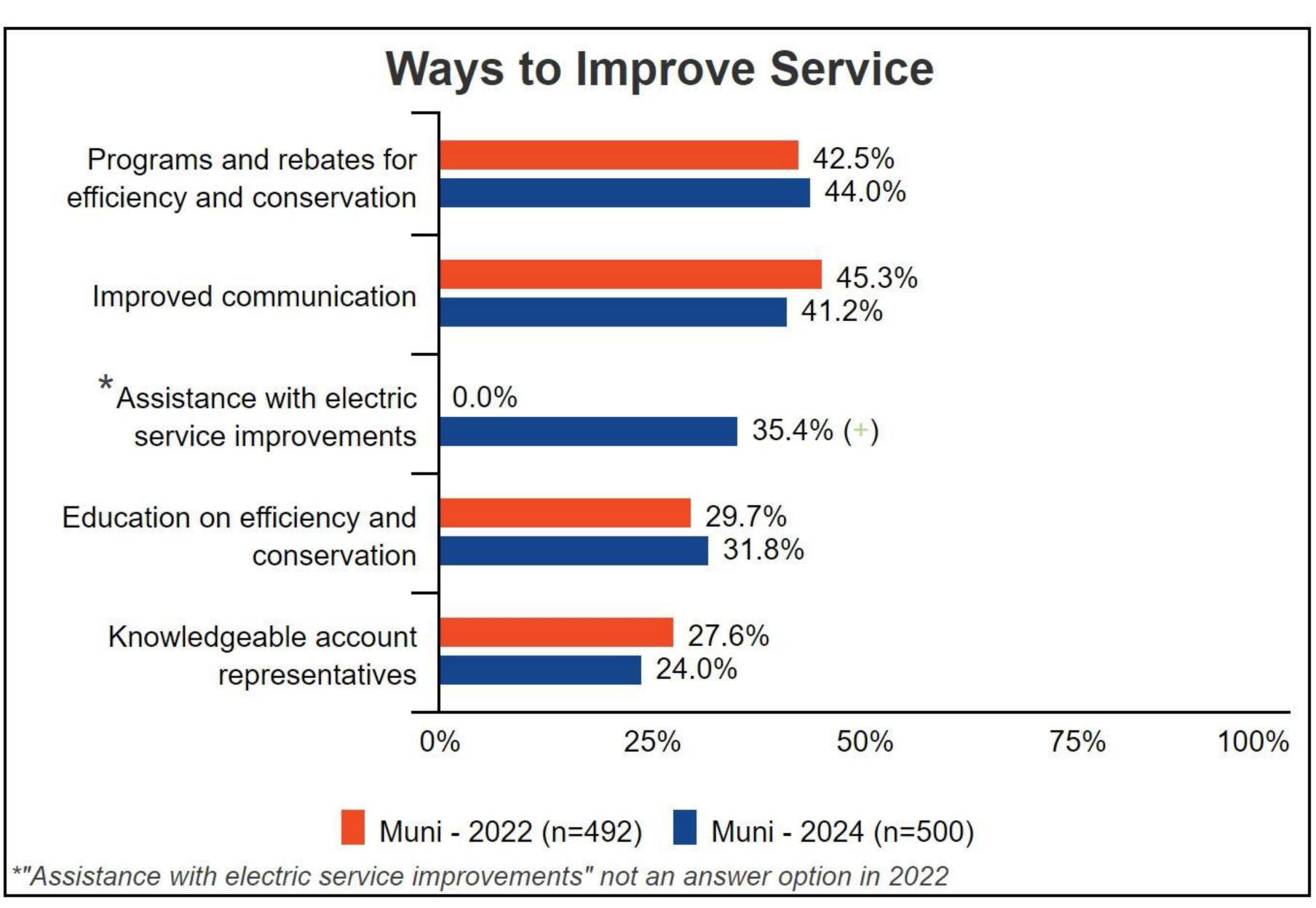


## Organizational Characteristics

### Satisfaction | Overall Satisfaction & Ways to Improve

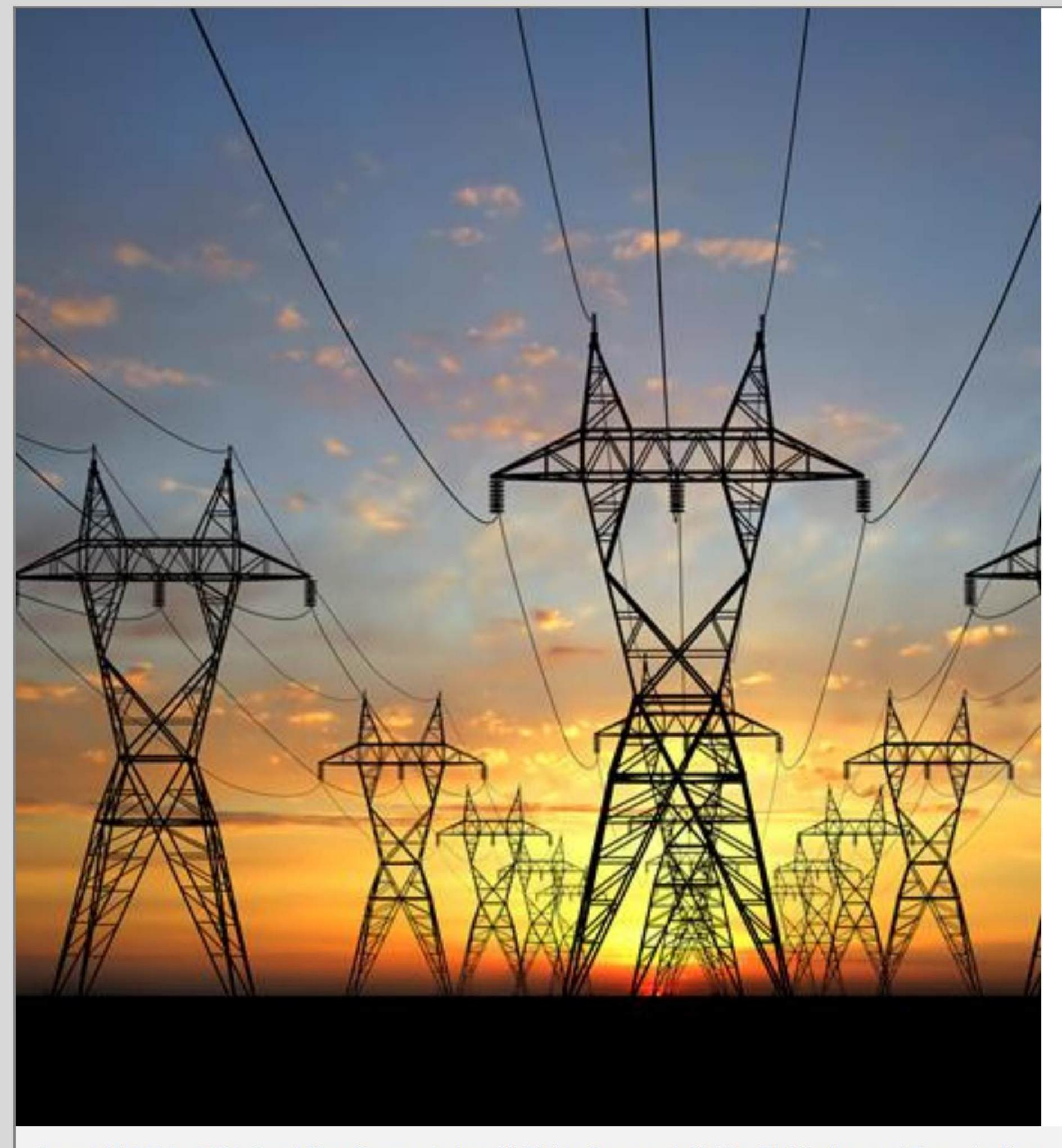
Over seven-out-of-ten muni respondents provided positive ratings for their overall satisfaction with their utility, consistent with 2022 findings. The top three ways utilities can improve their service are by offering "programs and rebates for efficiency and conservation," "improved communication," and by providing "assistance with electric service improvements."





Q1: On a scale of zero to ten, where zero (0) is "very dissatisfied" and ten (10) is "very satisfied," please rate your overall satisfaction with CMUA at present.

Q2: In what ways can CMUA change or improve the way it provides service to its customers?

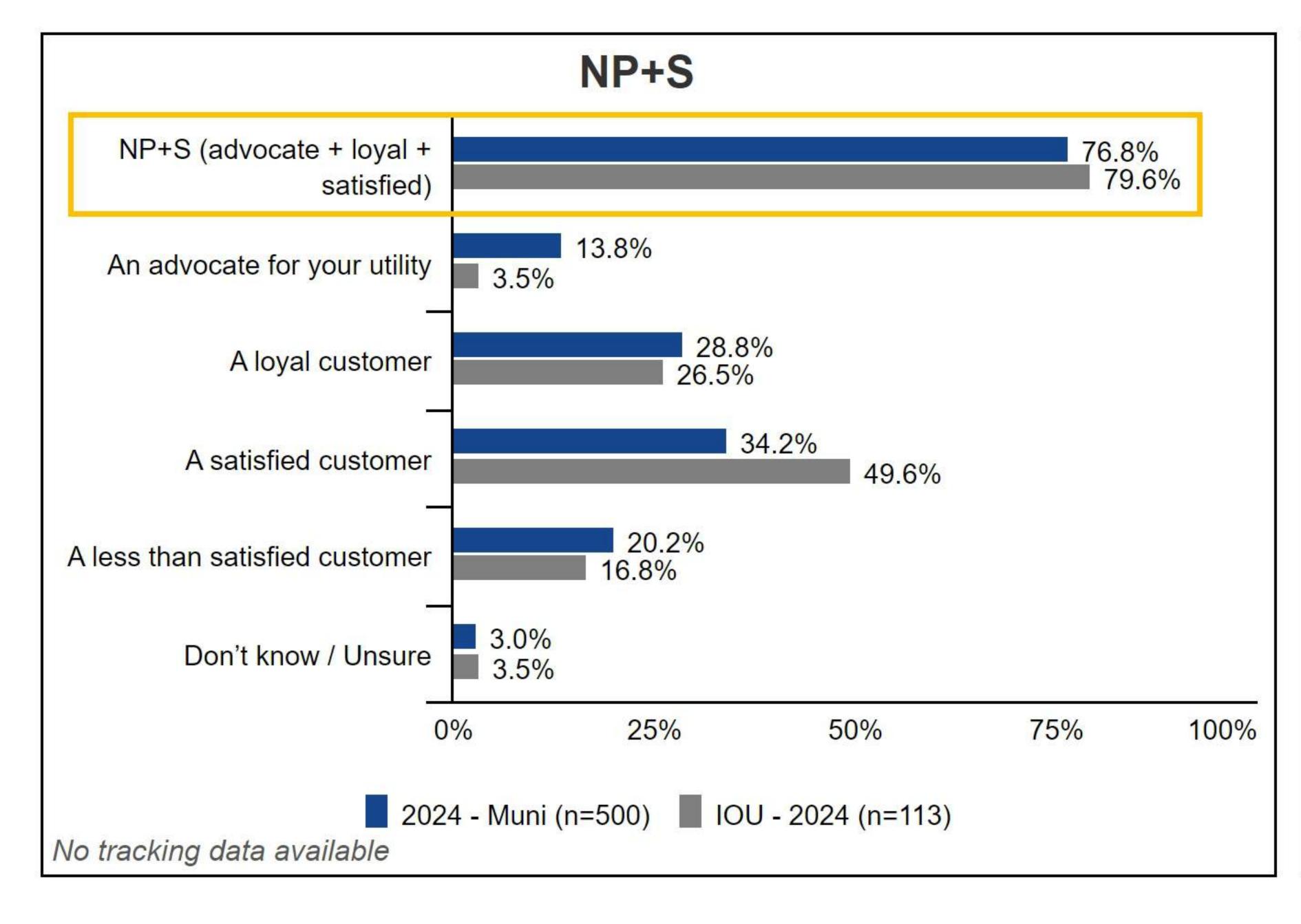


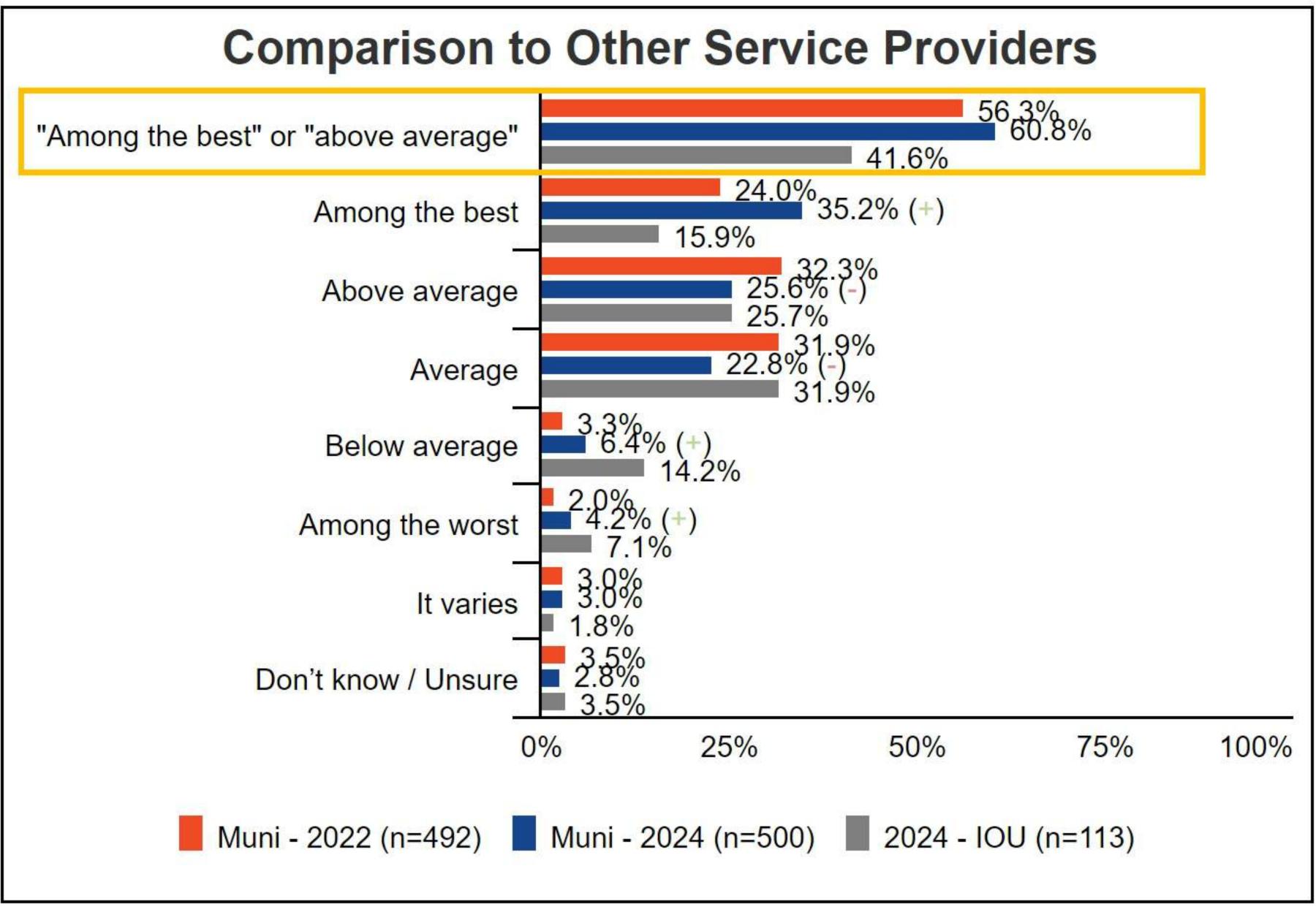


## Relationship

#### Relationship | Perception of Utility

Over three-quarters of muni respondents indicated they are either "an advocate for their utility," "a loyal customer," or "a satisfied customer." Significantly more muni respondents indicated their utility is "among the best" (+11.2 percentage points) in 2024 compared to 2022. Despite this, significantly more muni respondents indicated their utility is "below average" (+3.1 percentage points) or "among the worst" (+2.2 percentage points).



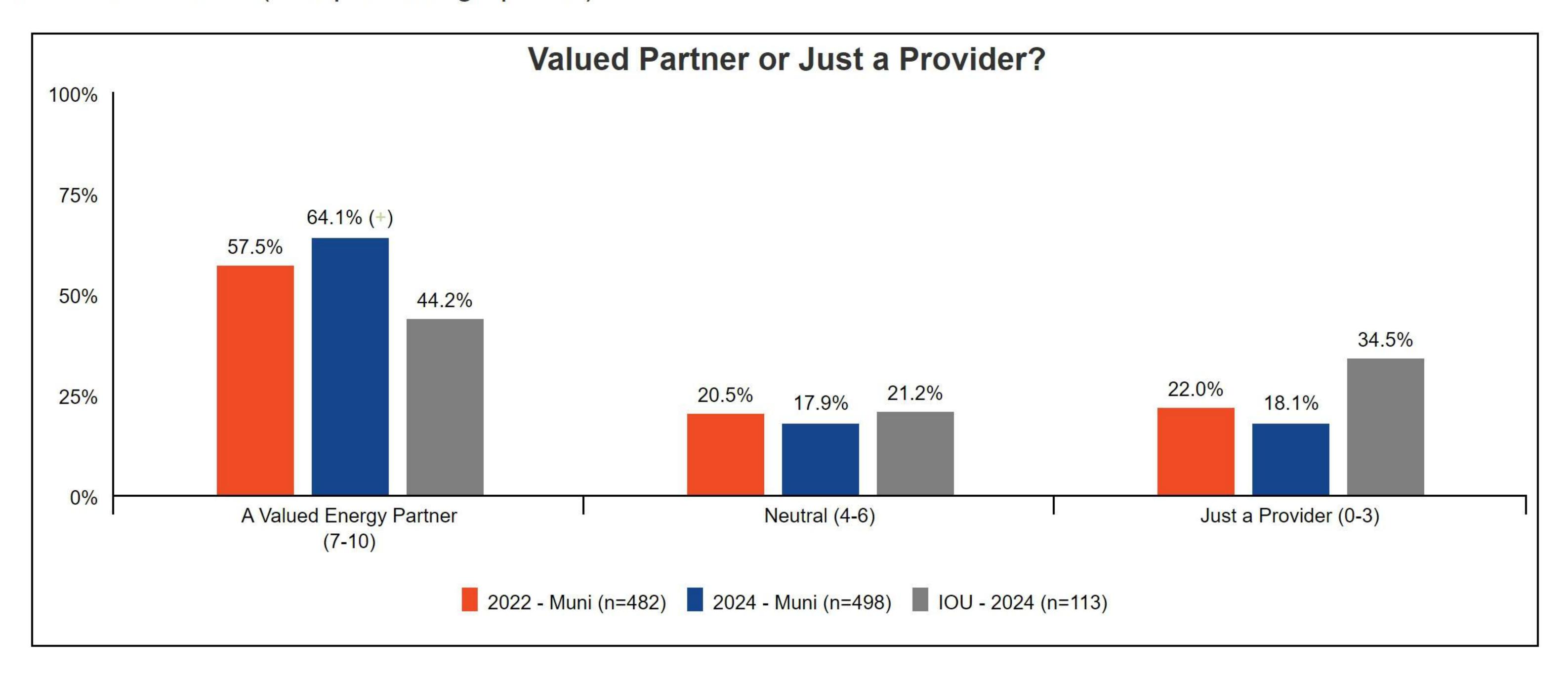


Q3: Which of the following best describes your relationship with your local utility?

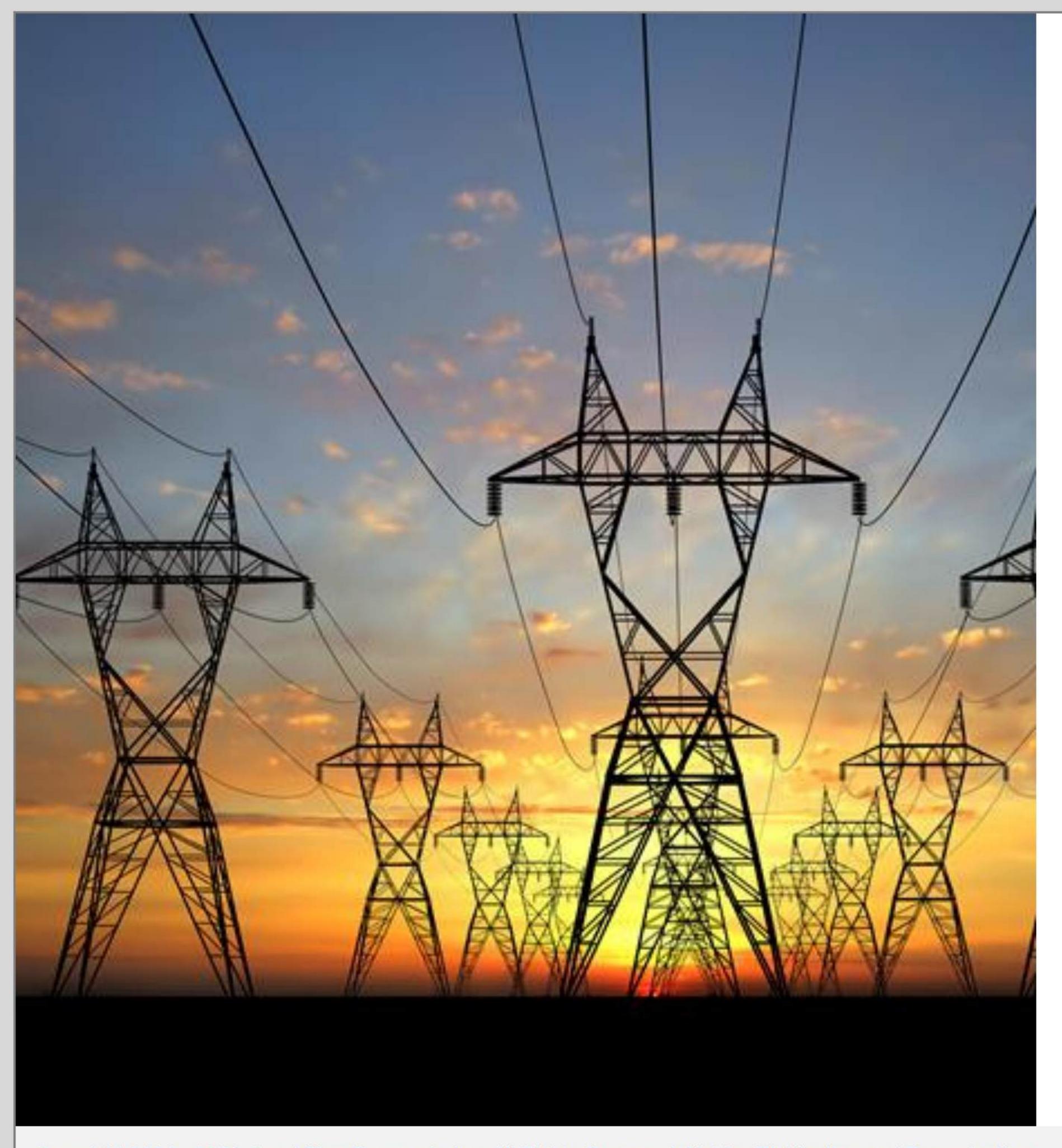
Q6: Compared to other service providers, would you call [utility]...

#### Relationship | Partner or Provider

Nearly two-thirds of muni respondents indicated they think of their utility as "a valued energy partner," a significant increase over 2022 (+6.6 percentage points). Conversely, 18.1% of muni respondents indicated they think of their utility as "just a provider," a slight decrease from 2022 (-3.9 percentage points).



Q4: Please describe the way you think of [utility] at present if zero (0) is "just a provider" and ten (10) is "valued partner."

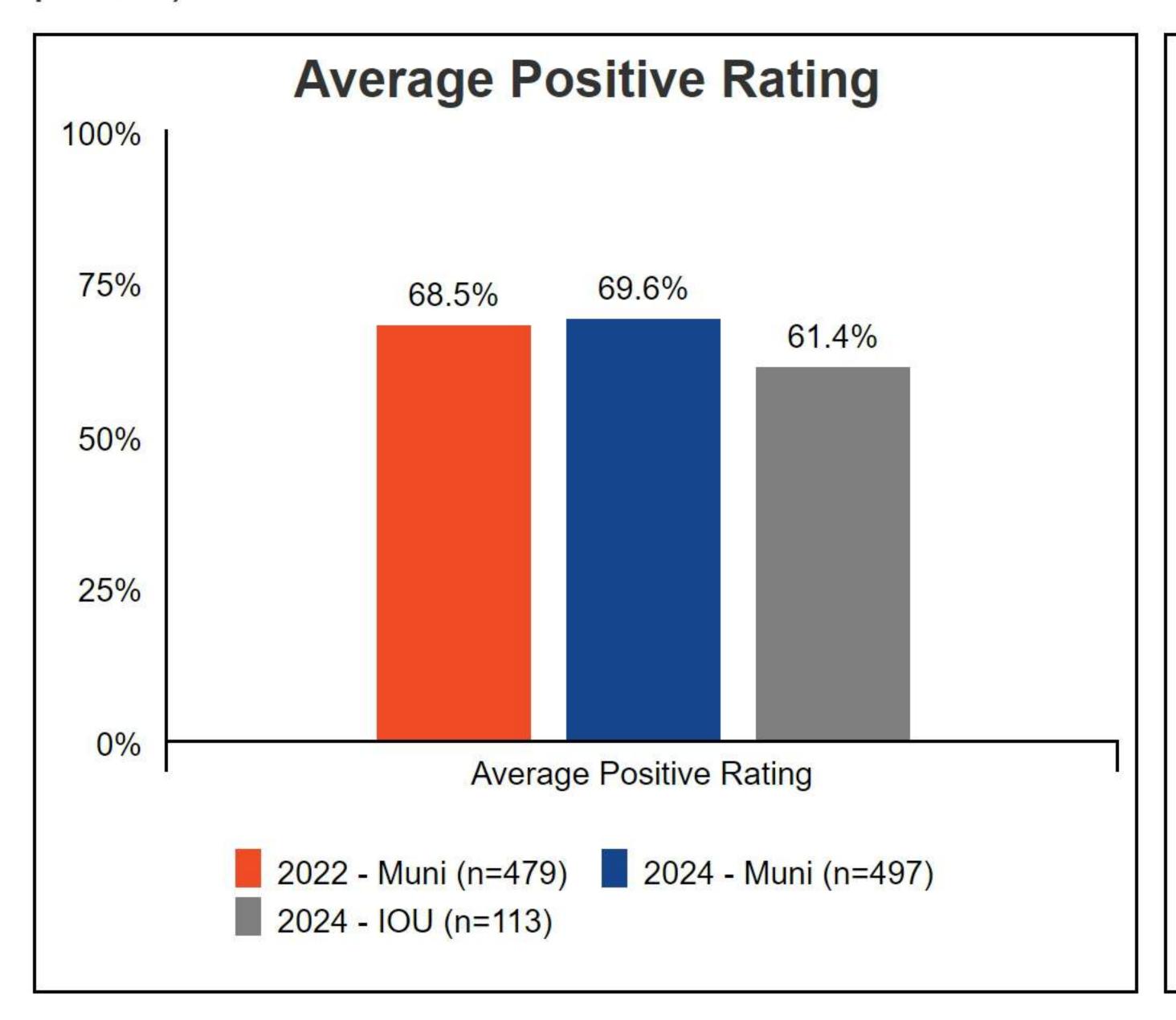




## Power Delivery

#### Power Delivery | Satisfaction

Over two-thirds of muni respondents provided positive ratings regarding their utilities' power delivery characteristics, with "providing reliable electricity" receiving the highest positive ratings. The average positive rating across all characteristics was 69.6%, relatively consistent with 2022 findings, and higher than the average rating among IOU respondents (+8.2 percentage points).

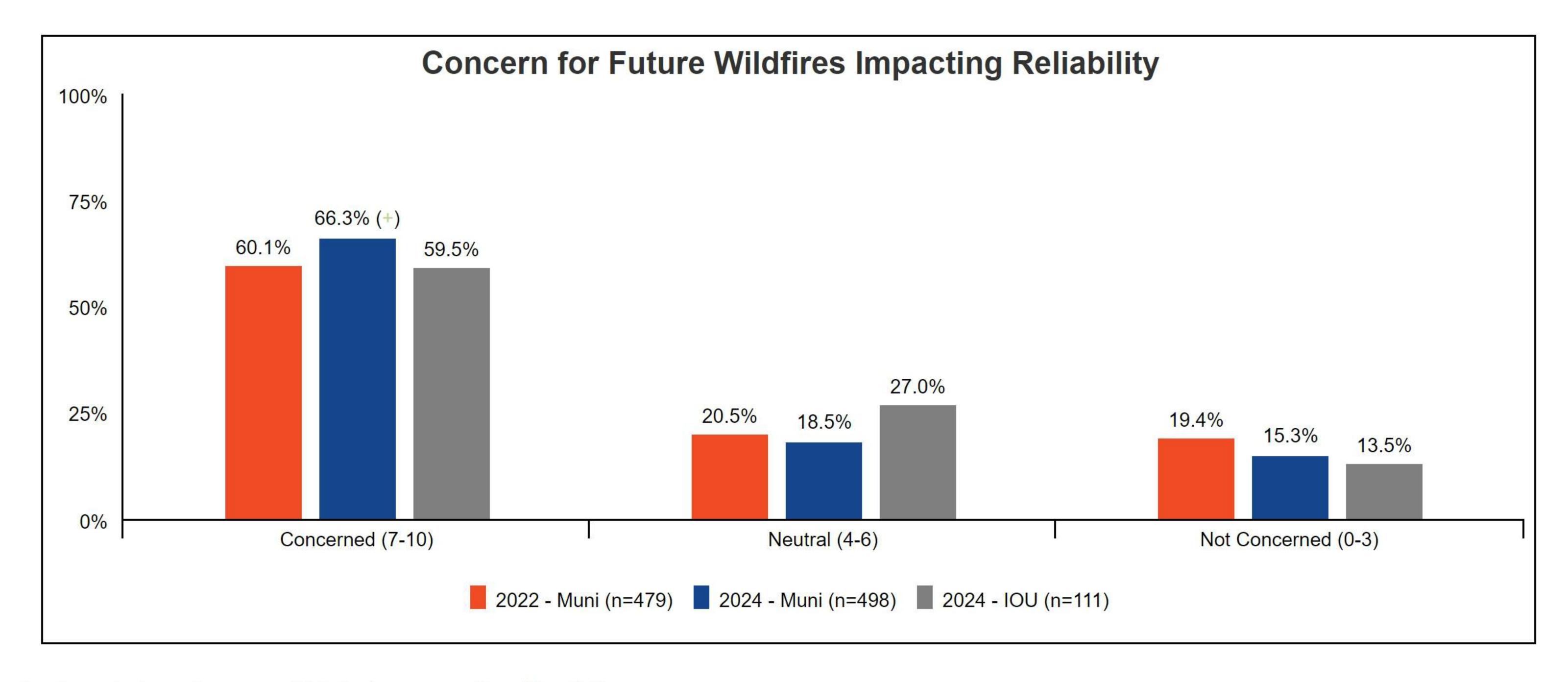


Power Delivery Characteristic Ratings					
	Excellent (7-10)				
	2022	2024			
Providing reliable electricity	71.6%	71.2%			
Restoring power quickly after an outage	67.5%	70.2%			
Providing timely information about restoration during an outage	66.4%	67.3%			

Q7: On a scale of zero to ten, where zero (0) is "poor" and ten (10) is "excellent," rate [utility] on each item below.

#### Power Delivery | Concern for Wildfires

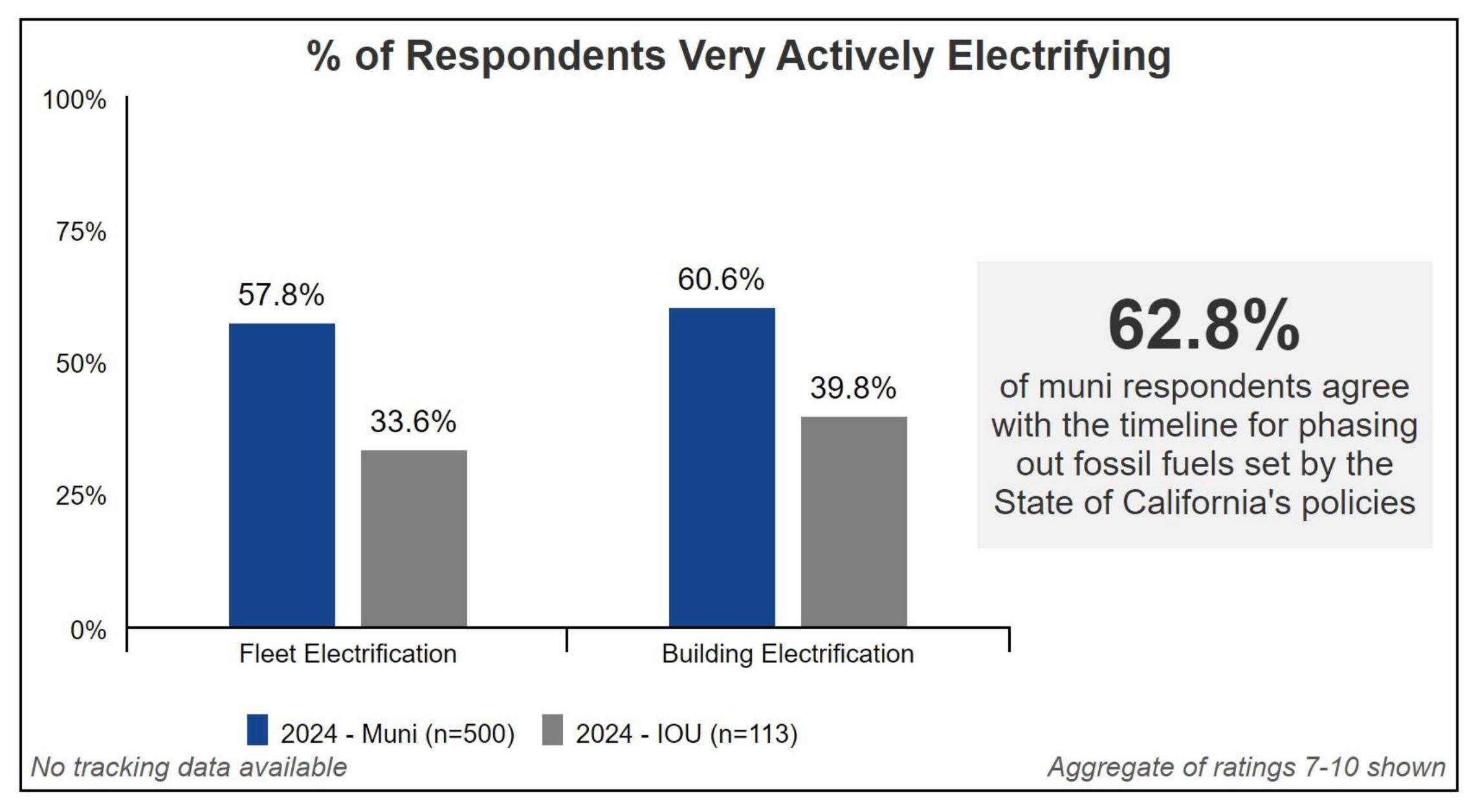
Significantly more muni respondents indicated they are concerned about future wildfires impacting the reliability of power delivered to their organization in 2024 compared to 2022 (+6.2 percentage points).

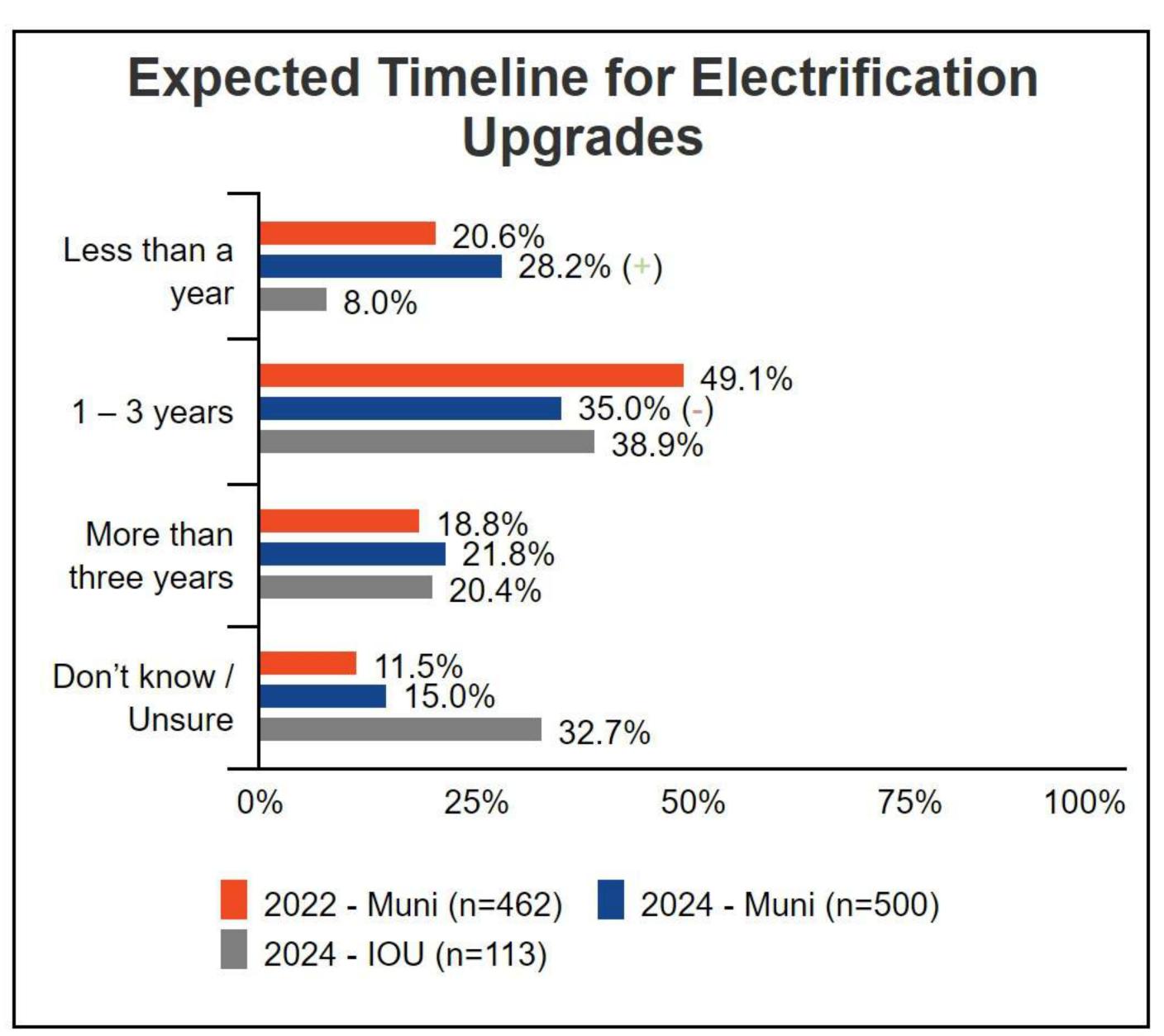


Q8: On a scale of zero to ten, where zero (0) is "not concerned" and ten (10) is "very concerned," how concerned are you that future wildfires will have an impact on the reliability of power delivered to your organization?

#### Power Delivery | Electrification

Three-fifths of muni respondents indicated they are actively electrifying their building, while slightly fewer reported the same regarding fleet electrification. Notably, significantly more muni respondents in 2024 plan to implement electrification upgrades within a year compared to 2022 (+7.6 percentage points).





Q9: On a scale of zero to ten, where zero (0) is "not at all" and ten (10) is "very active," what is the level of electrification at your company? Q11: What is the expected timeframe for your electrification upgrades at your organization?

Q12: The State of California has established policies on increasing renewable energy supplies and phasing out fossil fuels. Current mandates established are to be 60% renewable by 2030 and decarbonized by 2045. How strongly do you agree or disagree with the timing established by the State?



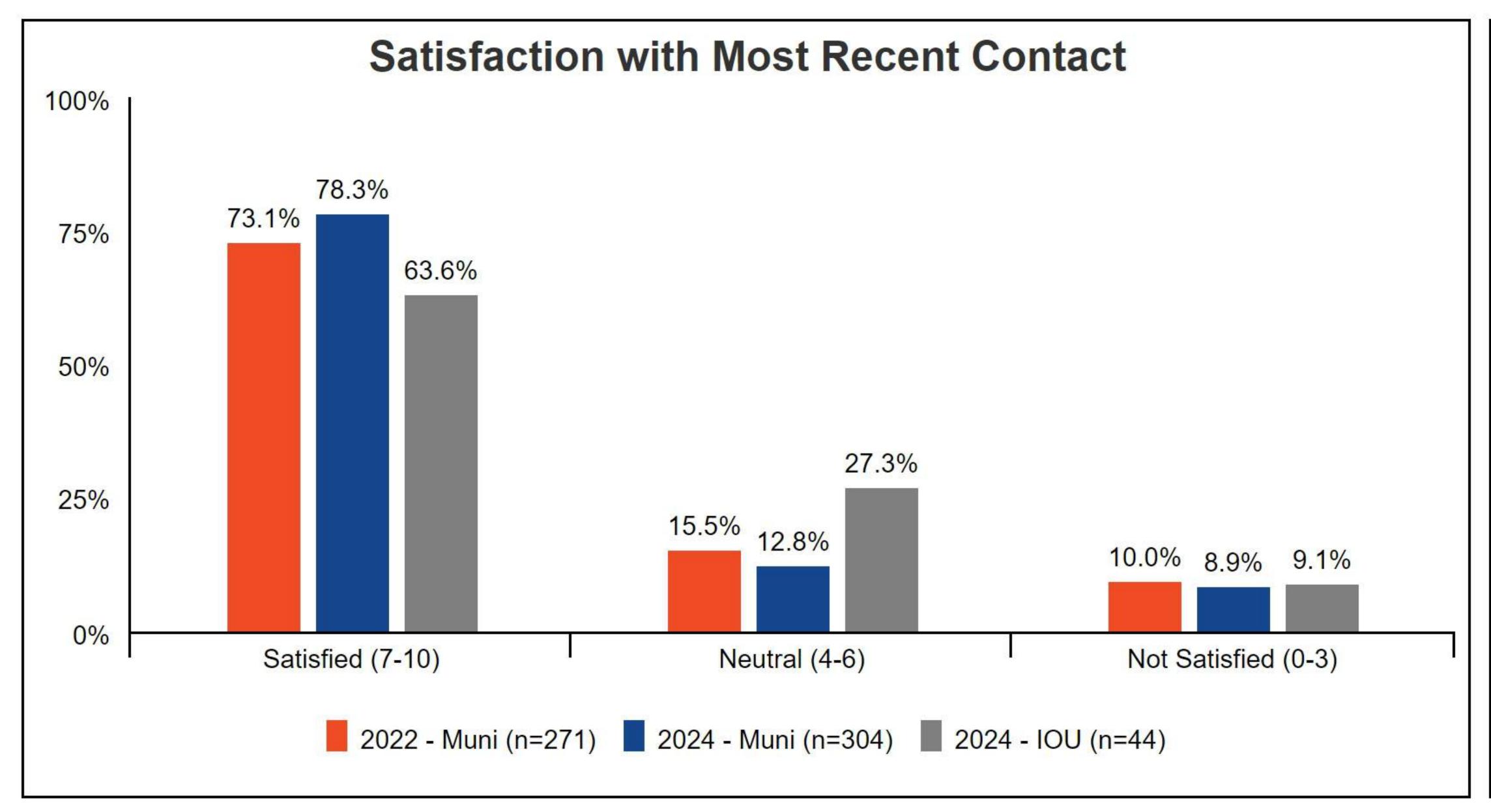


## Account Service

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#### Account Service | Satisfaction

Of the 304 muni respondents who recently contacted their utility, nearly four-fifths indicated they were satisfied with the experience, a slight increase over 2022 findings (+5.2 percentage points). The most common method of contact was calling the utility followed by contacting an assigned account manager and contacting an employee at the utility.



Contact Method	o'q
Base size	304
Called customer service	46.4%
Contact assigned account manager/advisor	18.4%
Contacted an employee at the utility	14.1%
Personal visit to their office	7.6%
Sent an e-mail	5.9%

Q14: What method did you use to contact your utility?

Q15: On a scale of zero to ten, where zero (0) is "not satisfied" and ten (10) is "very satisfied," how satisfied were you with your most recent contact with [contact].

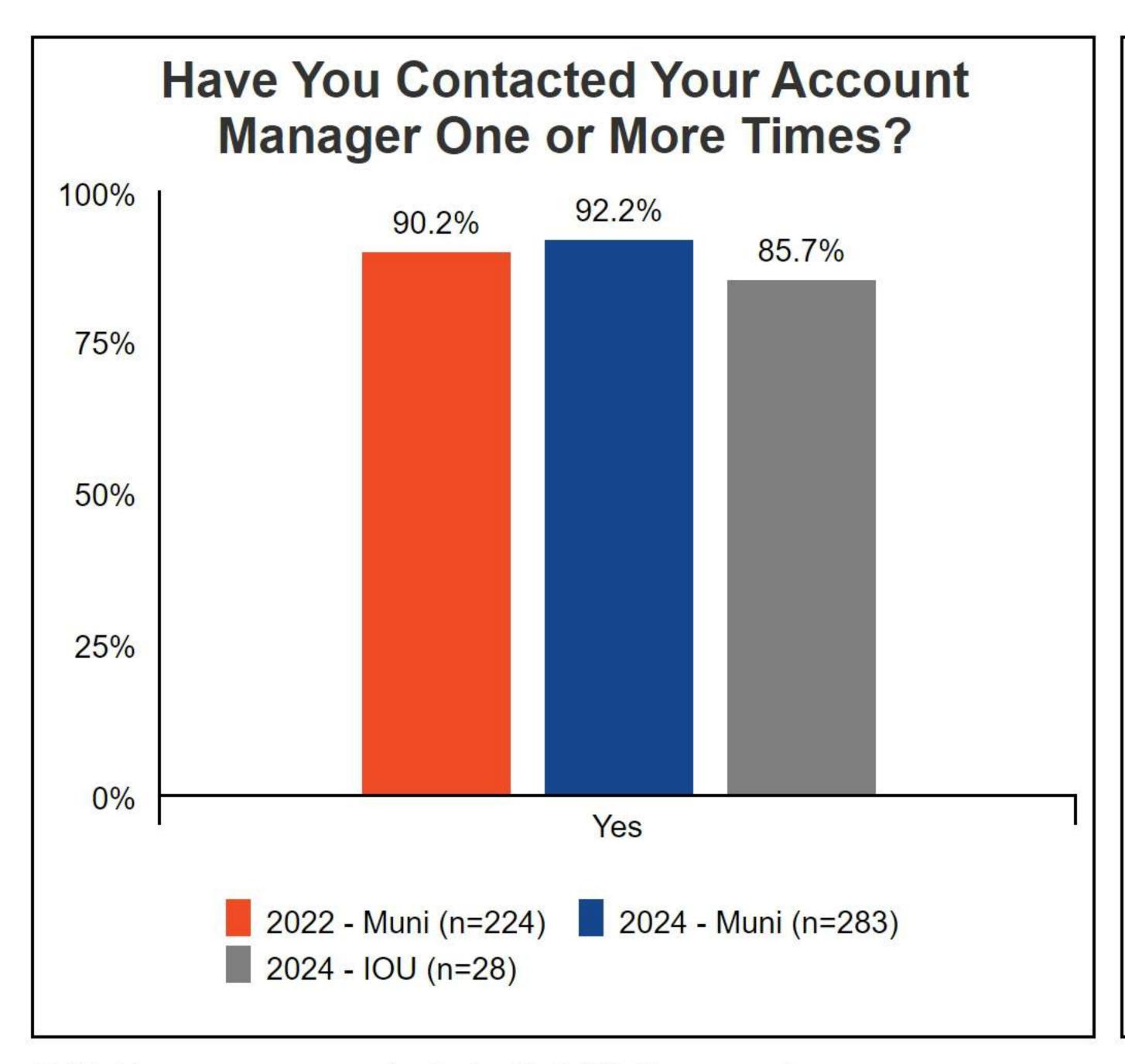




# Managed/Key Account Assessment

#### Key Accounts | Satisfaction

Significantly more muni respondents provided positive ratings across all key account manager characteristics in 2024 compared to 2022. Most notably, key account managers' performance regarding "acting as a source of information about emerging technologies and how they benefit you" and "providing money-saving advice" saw a 10.2 and 9.7 percentage point increase in positive ratings, respectively.



Key Account Manager Characteristic Ratings				
	Excellent (7-10)			
	2022	2024		
	Muni	Muni		
Easy to reach	79.2%	86.3%		
Promptly responds	79.2%	86.3%		
Provides money-saving advice	73.8%	83.5%		
Understands what your organization does and how electricity is involved in your business	76.1%	85.3%		
Acts as a source of information about emerging technologies and how they benefit you	74.4%	84.6%		
Performs as a "valued energy partner" for you	77.1%	85.5%		
		1		

Cell color indicates statistical significance at a 95% confidence level, denoting whether the data point is higher or lower than the previous iteration of the survey

84.6%

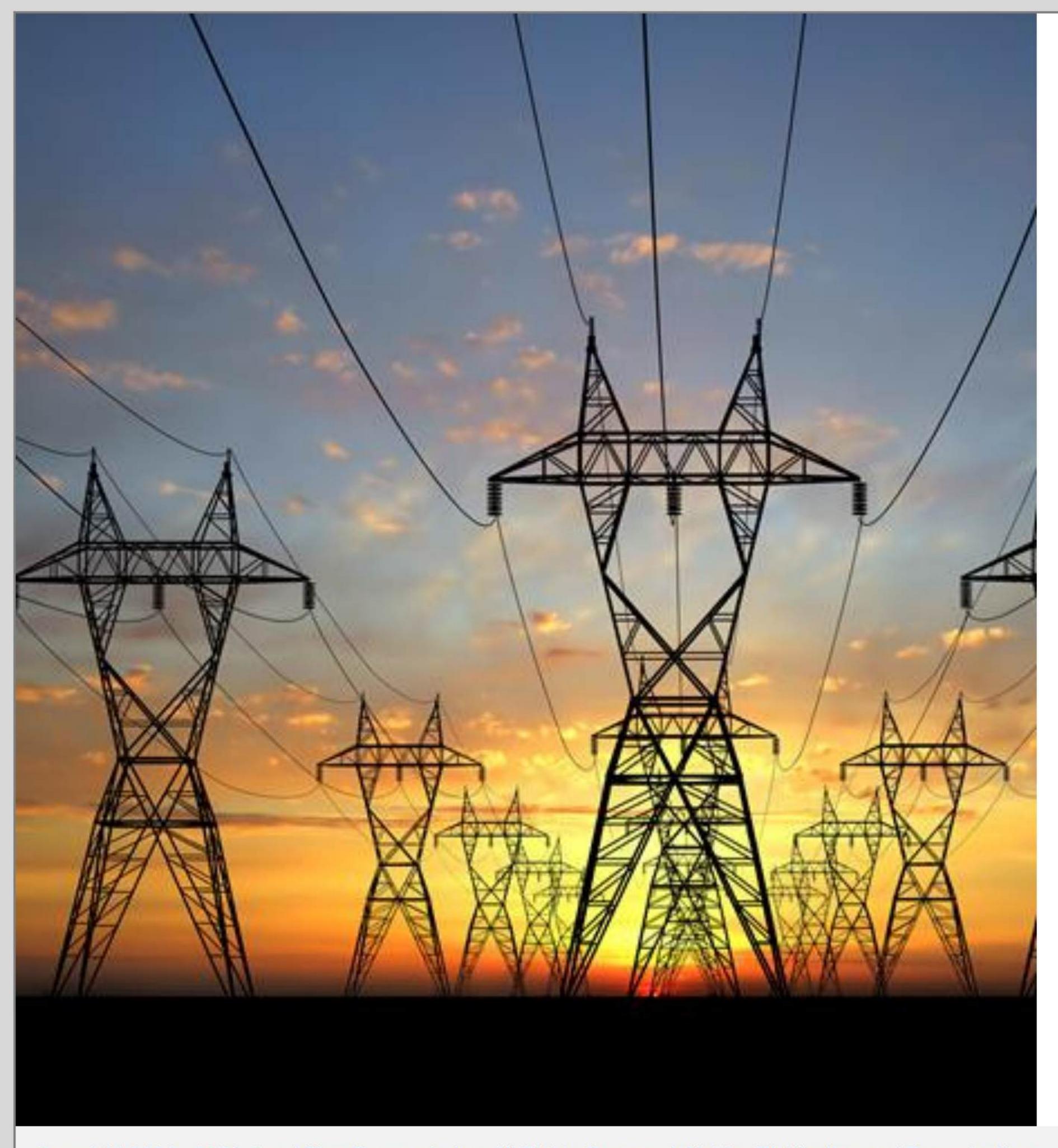
Overall Satisfaction with Key Account Manager

85.6%

Q17: Have you communicated with [utility]'s account manager one or more times, either in person, over the phone or through texting or email?

Q18: On a scale of zero to ten, where zero (0) is "poor" and ten (10) is "excellent," please rate your [utility] account advisor or manager on the following characteristics.

Q19: On a scale of zero to ten, where zero (0) is "poor" and ten (10) is "excellent," please rate your [utility] account advisor or manager on the overall job they do for your organization.

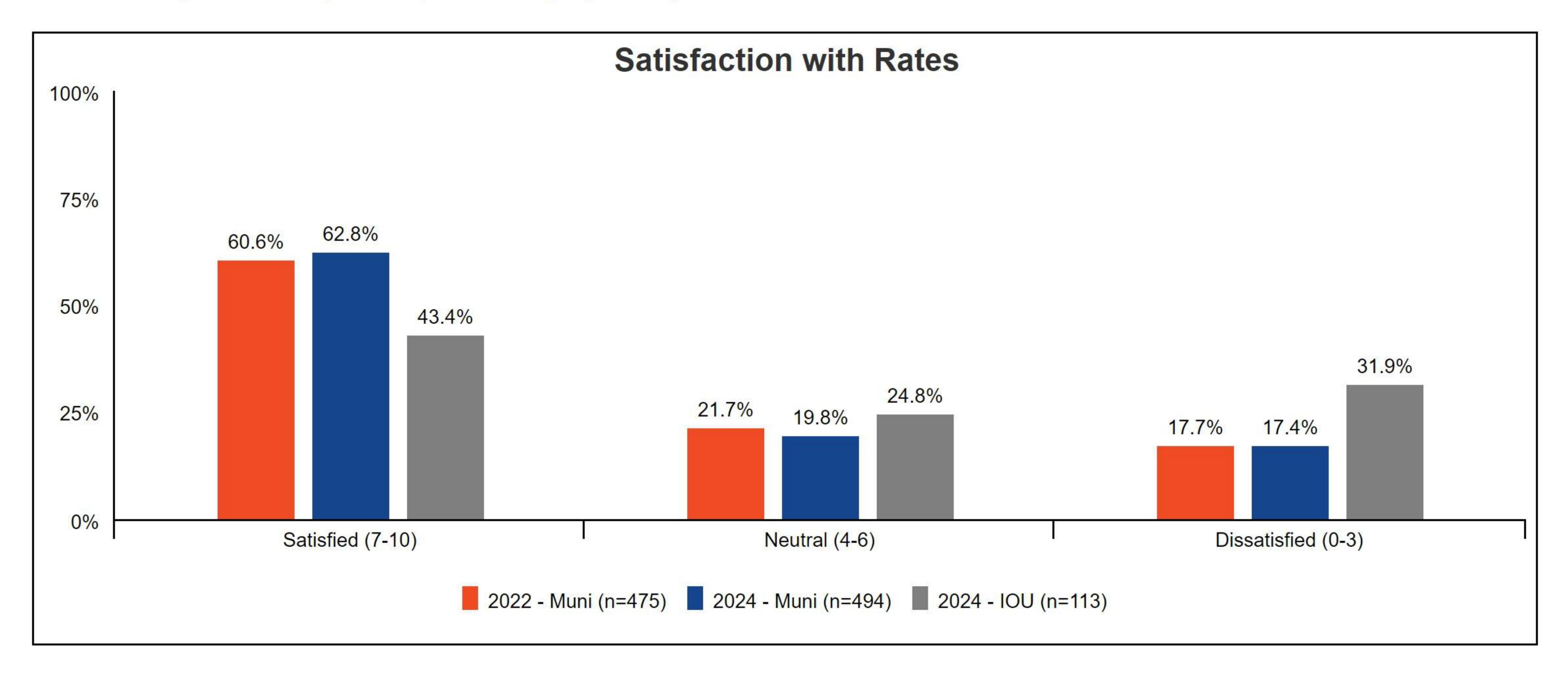




## Pricing

#### Pricing | Satisfaction with Rates

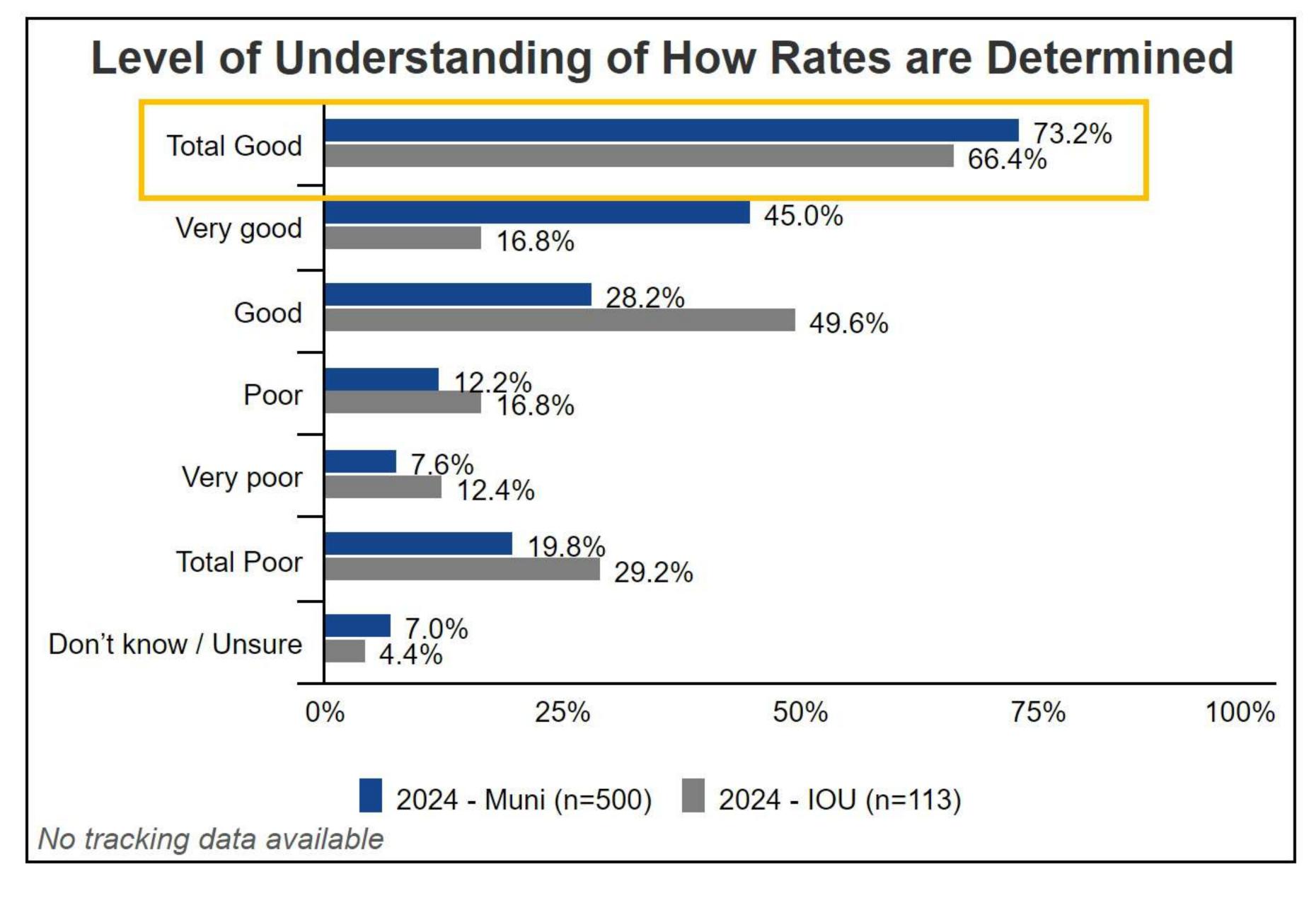
Over three-fifths of muni respondents indicated they are satisfied with the price they pay for electricity, while 17.4 indicated they are dissatisfied. Of note, significantly more muni respondents reported being satisfied with the price they pay for electricity compared to IOU respondents (+19.4 percentage points).

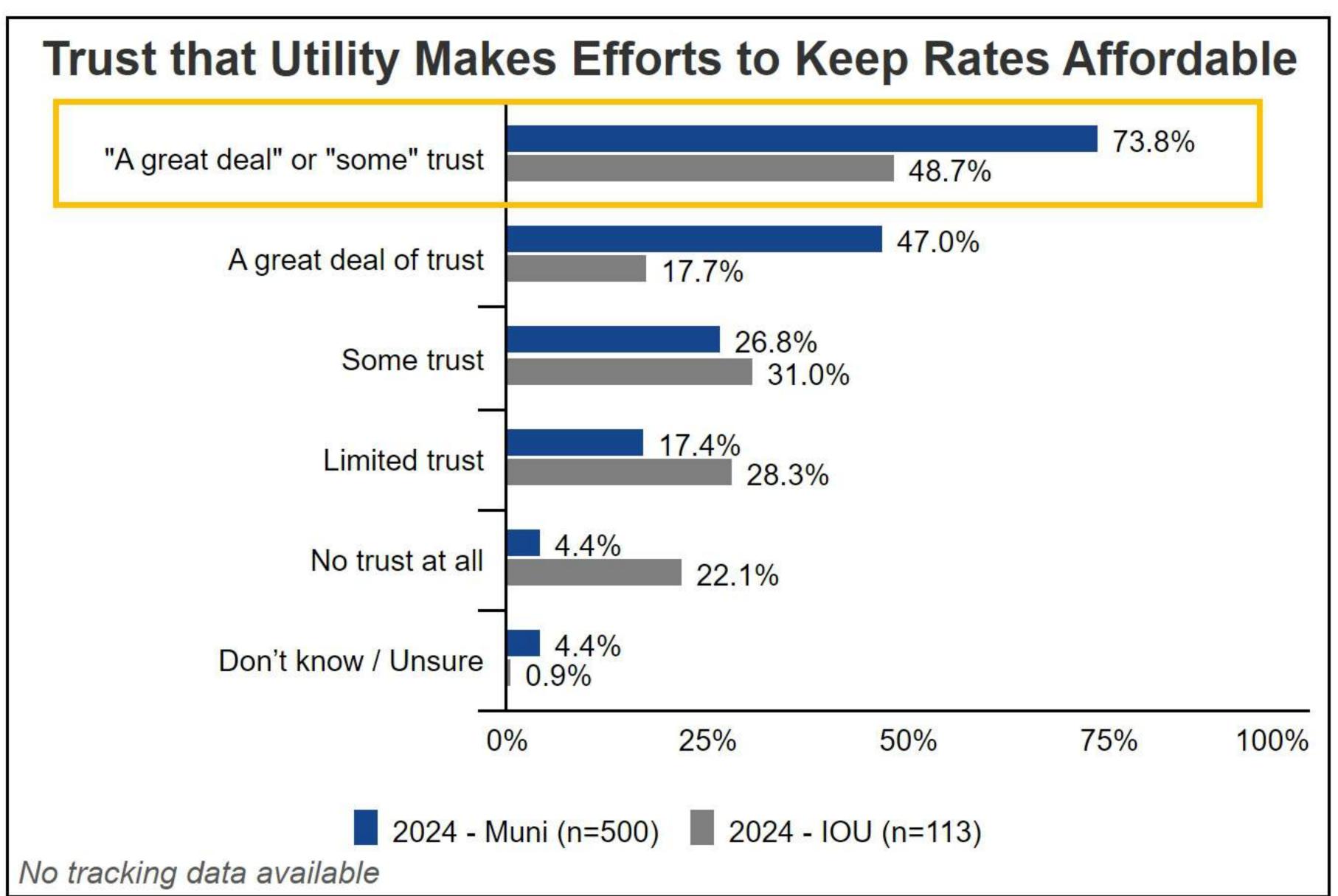


Q20: On a scale of zero to ten, where zero (0) is "very dissatisfied" and ten (10) is "very satisfied," please rate your satisfaction with [utility] on the price you pay for electricity.

#### Pricing | Understanding of Rates

Nearly three-quarters of muni respondents indicated they have a "very good" or "good" understanding of how their electric rates are determined, and a similar frequency of muni respondents indicated they have "a great deal" or "some" trust that their utility does all it can to keep its rates affordable. Of note, significantly more muni respondents reported having "a great deal" or "some" trust that their utility does all it can to keep rates affordable compared to IOU respondents (+25.1 percentage points).





Q21: How would you rate your level of understanding of how your utility's rates are determined?

Q22: How would you describe the level of trust you have that your utility does all it can to keep its rates affordable?

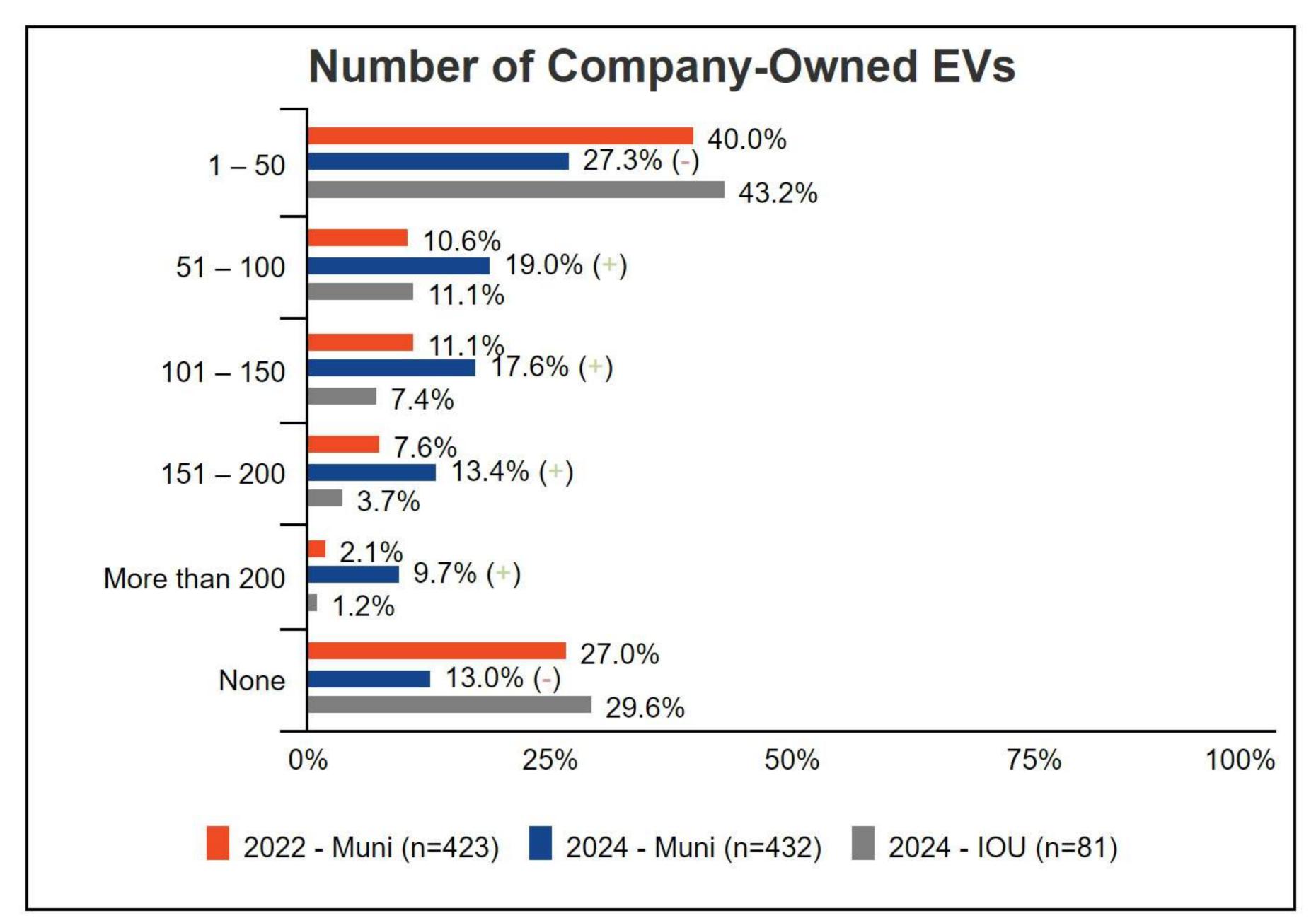


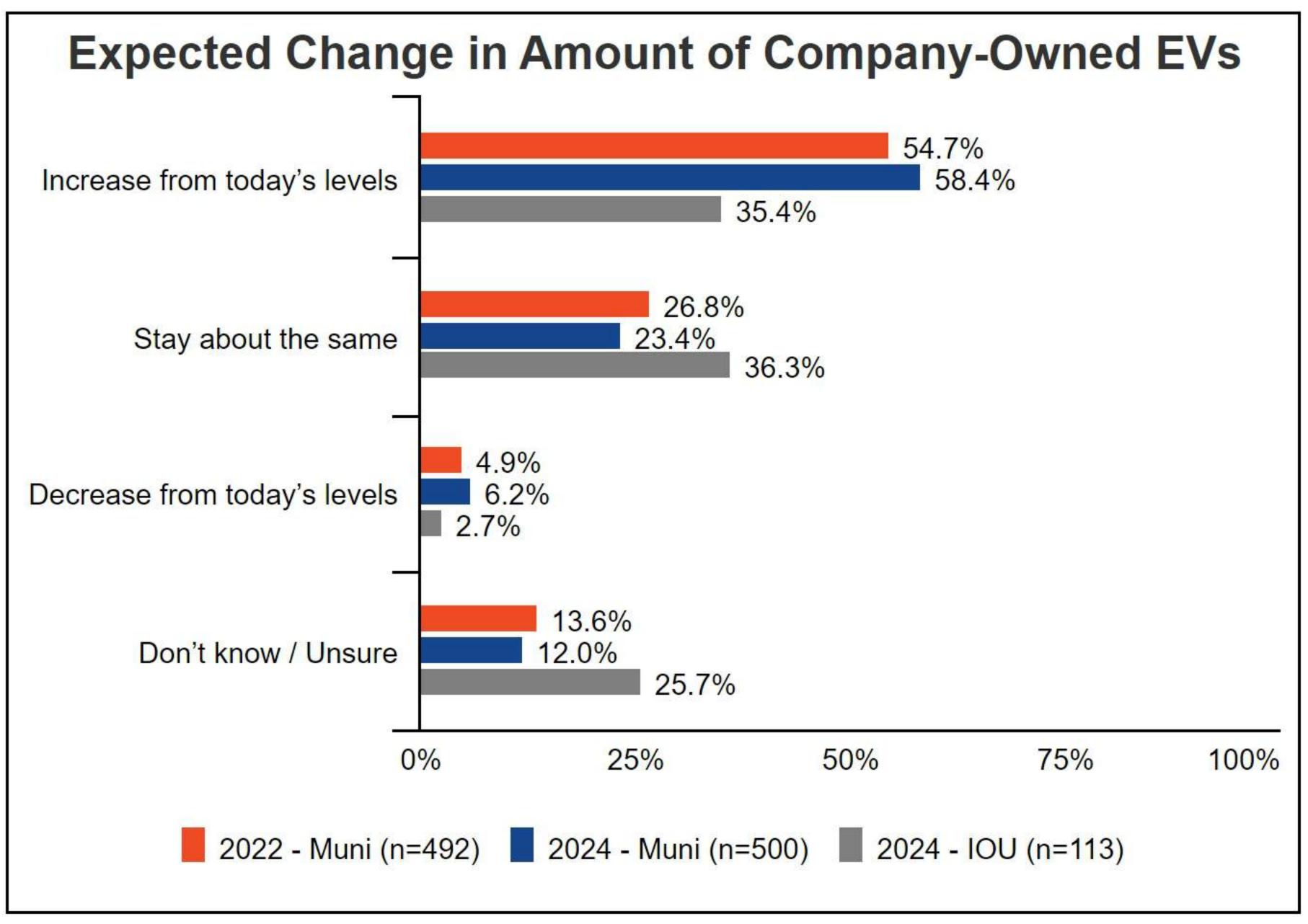


## Electric Vehicles & Chargers

#### Electric Vehicles | Fleet Size & Expected Change

Electric vehicle ownership increased significantly from 2022 to 2024, with significantly fewer muni respondents indicating they have no company-owned electric vehicles (-14.0 percentage points). Furthermore, electric vehicle fleet sizes are increasing, as significantly more muni respondents have 51 or more electric vehicles in 2024 (59.7% compared to 31.4% in 2022). This trend is expected to continue, as nearly three-fifths of muni respondents indicated they plan to expand their fleet of electric vehicles in the future.



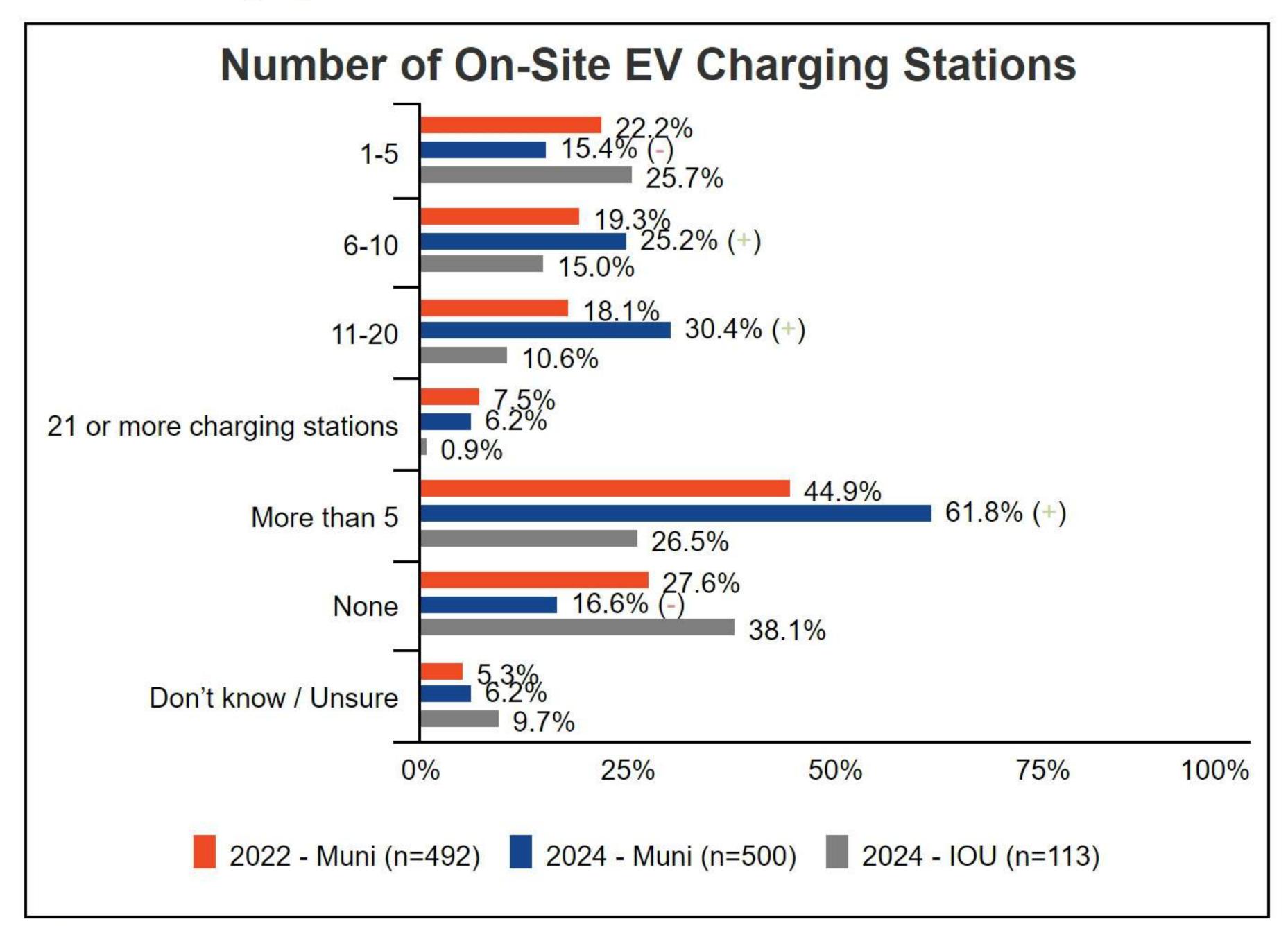


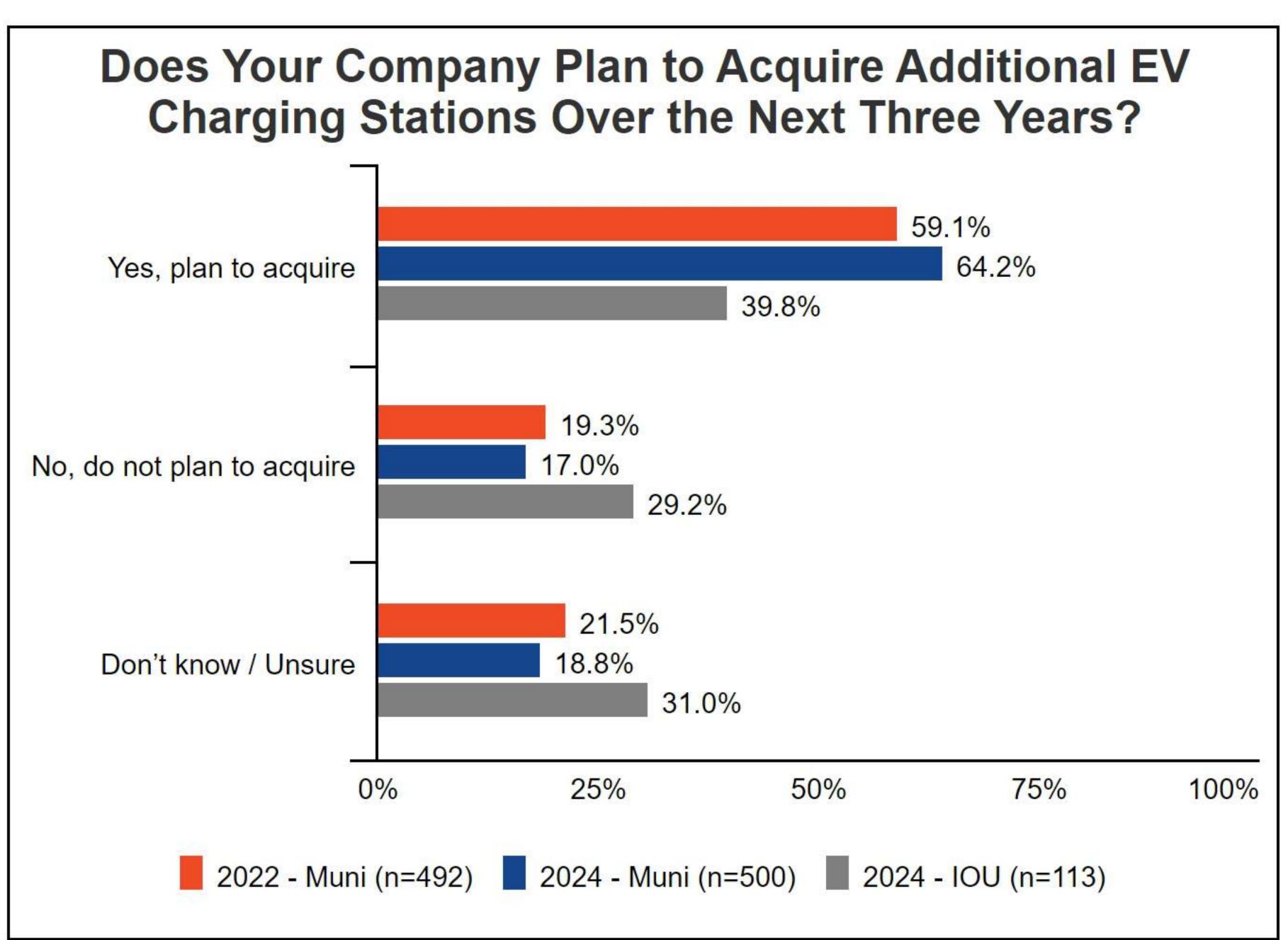
Q24: How many electric vehicles do you have, if any?

Q25: In the future, do you expect the number of electric vehicles (EVs) in your organization's fleet to...

#### Electric Vehicles | Charging Stations

Significantly more muni respondents have on-site electric vehicle charging stations, with significantly fewer muni respondents indicating they have no charging stations (-21.5 percentage points). Furthermore, the number of on-site charging stations per company is increasing, as significantly more muni respondents have six (6) or more charging stations in 2024 (61.8% compared to 44.9% in 2022). This trend is expected to continue, as nearly two-thirds of muni respondents indicated they plan to either acquire or install additional on-site electric vehicle charging stations.

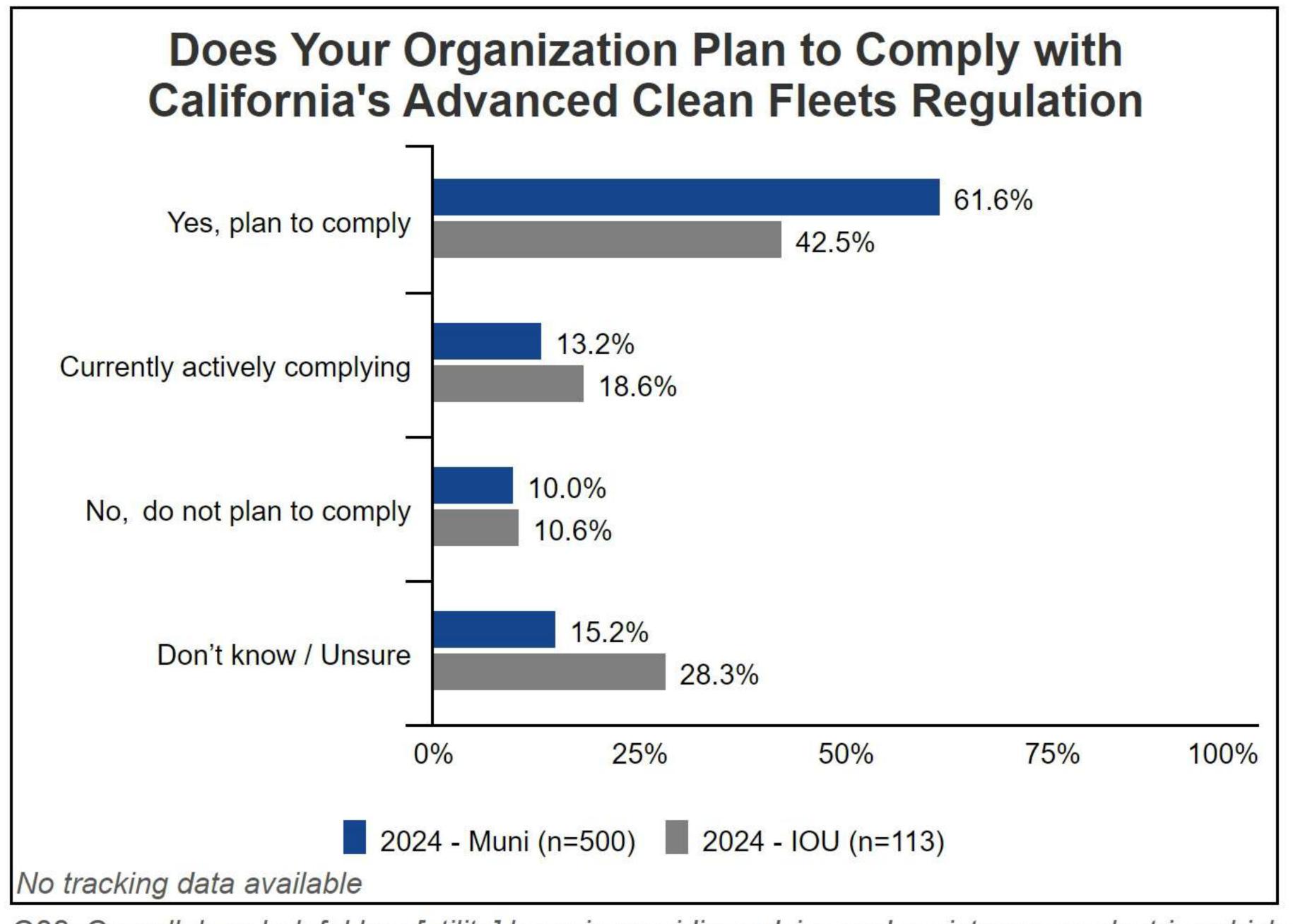


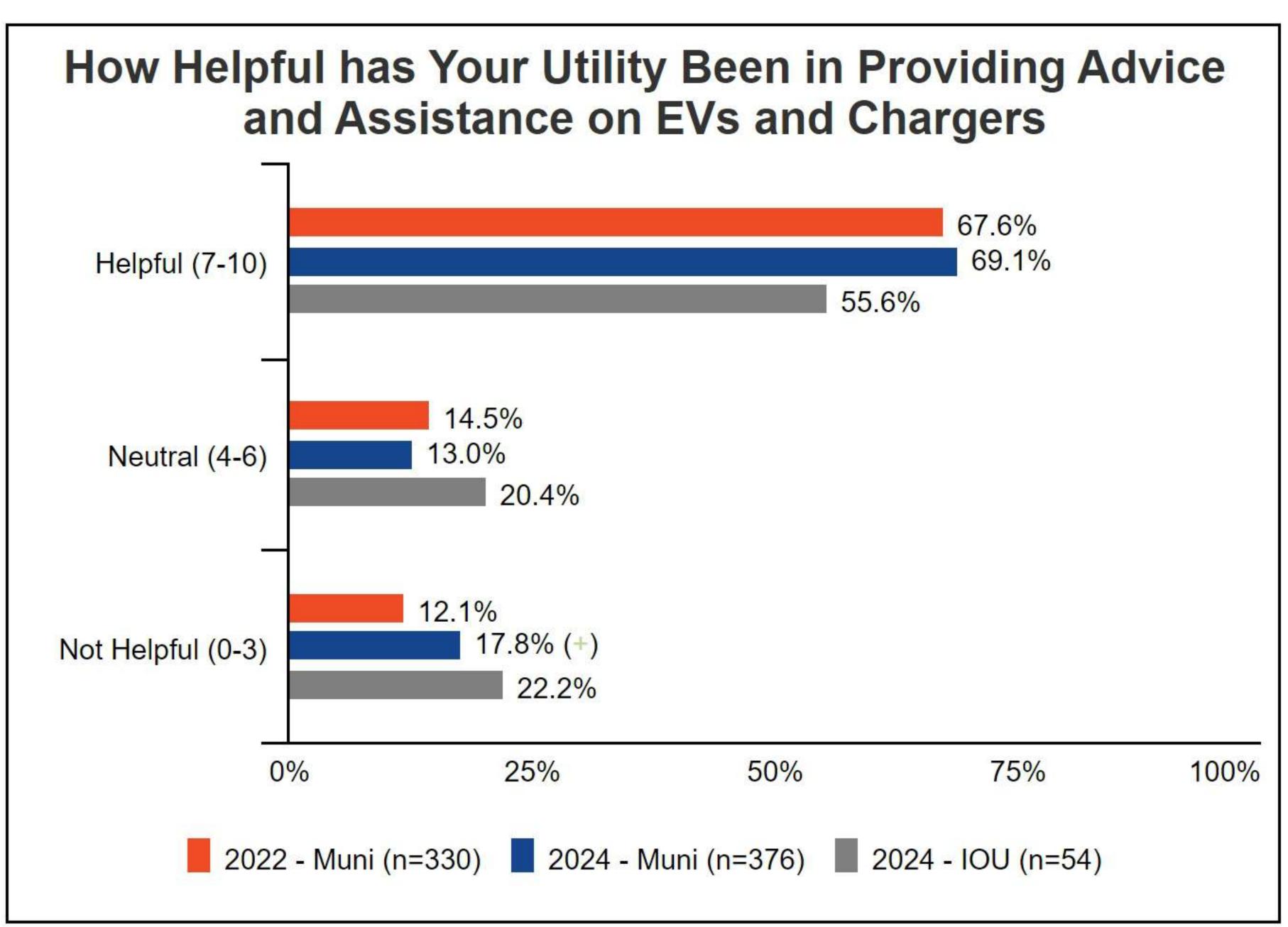


Q26: Does your organization have any electric vehicle charging stations on-site? if so, how many? Q27: Does your organization plan to acquire (additional) electric vehicle charging stations over the next three years?

#### Electric Vehicles | Helpfulness of Utility/Regulation Compliance

Over three-fifths of muni respondents indicated they plan to comply with California's Advanced Clean Fleets regulation, and 13.2% are currently complying. Additionally, over two-thirds of muni respondents indicated their utility has helped provide advice and assistance on electric vehicles and charging stations, significantly higher than the frequency of IOU respondents who reported the same (+13.5 percentage points).





Q28: Overall, how helpful has [utility] been in providing advice and assistance on electric vehicles and chargers where zero (0) is "not helpful" and ten (10) means "very helpful?"

Q29: Does your organization plan to comply with California's Advanced Clean Fleets Regulation focusing on zero-emission medium and heavy-duty vehicles?



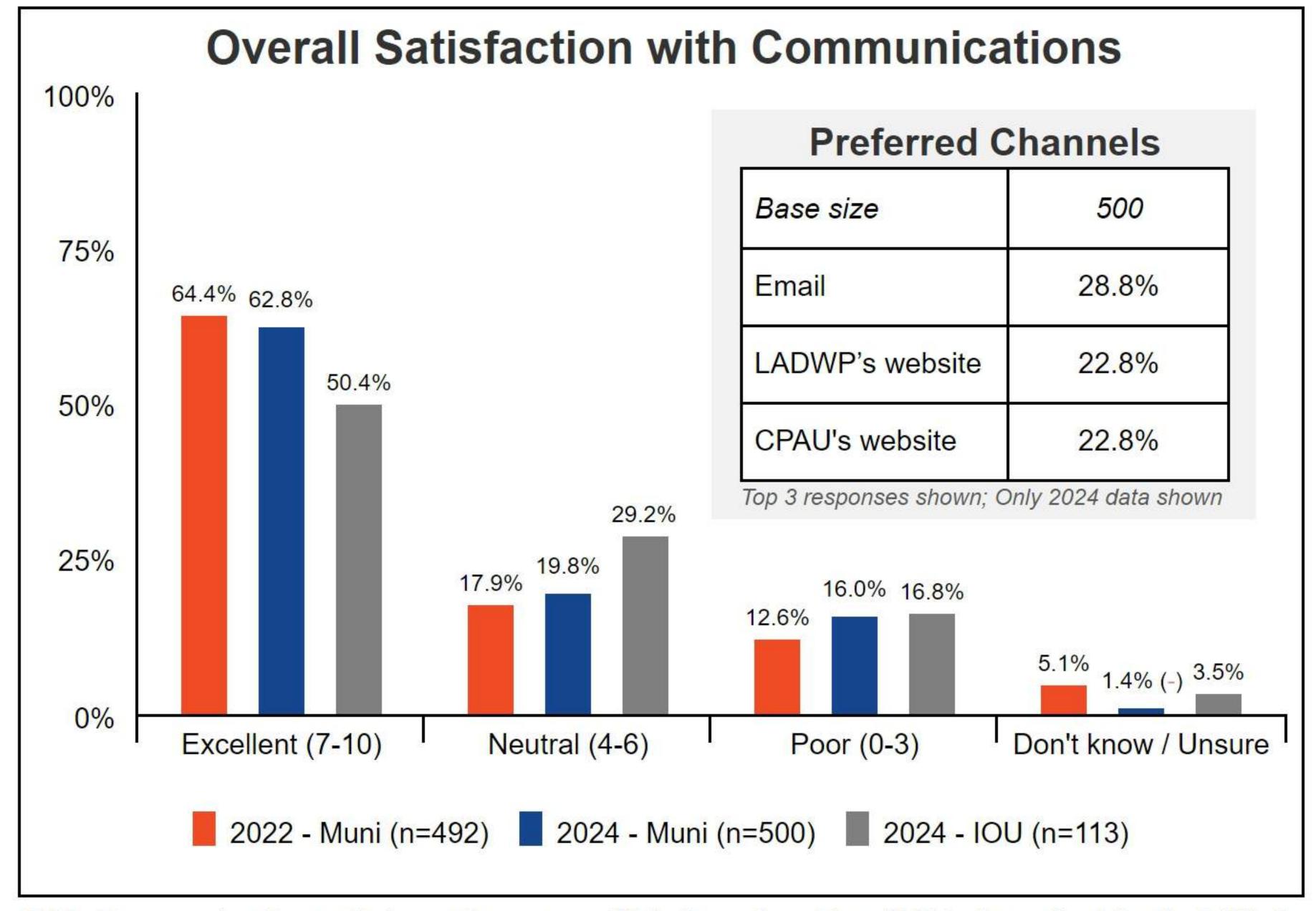


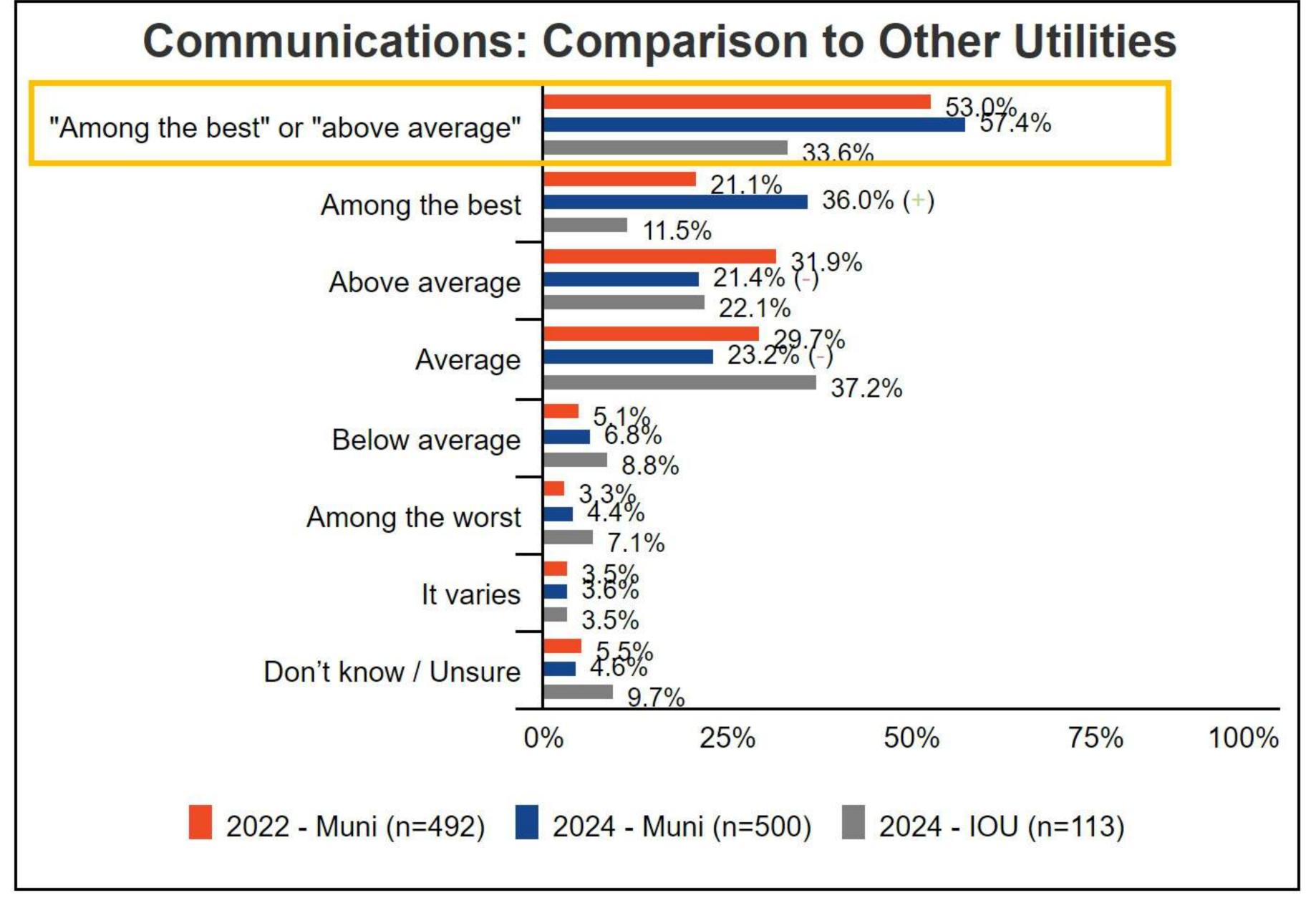
## Communications

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#### Communications | Satisfaction

Over three-fifths of muni respondents provided positive ratings for their overall satisfaction with communications coming from their utility. Furthermore, significantly more muni respondents indicated their electric utility is "among the best" in terms of communications received from other utilities in 2024 compared to 2022 (+14.9 percentage points). Additionally, more muni respondents indicated their utility's communication is "among the best" or "above average" compared to IOU respondents (+23.8 percentage points).

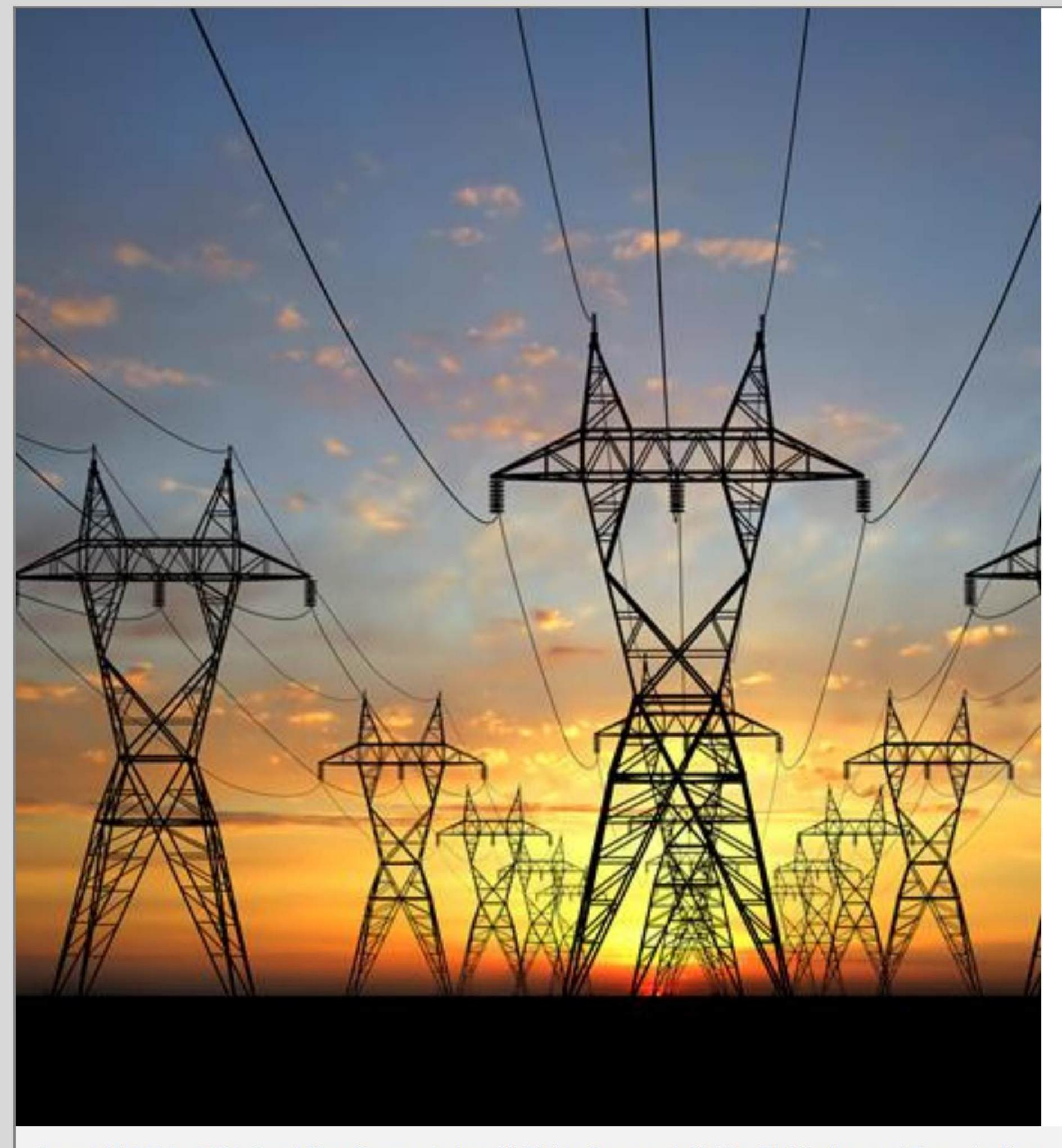




Q30: On a scale of zero to ten, where zero (0) is "poor" and ten (10) is "excellent," rate [utility]'s communication with business customers such as you on an overall basis.

Q31: Compared to other companies that your organization does business with, how does [utility]'s communications aimed at business customers compare?

Q32: Please indicate how you would prefer to receive information from [utility].

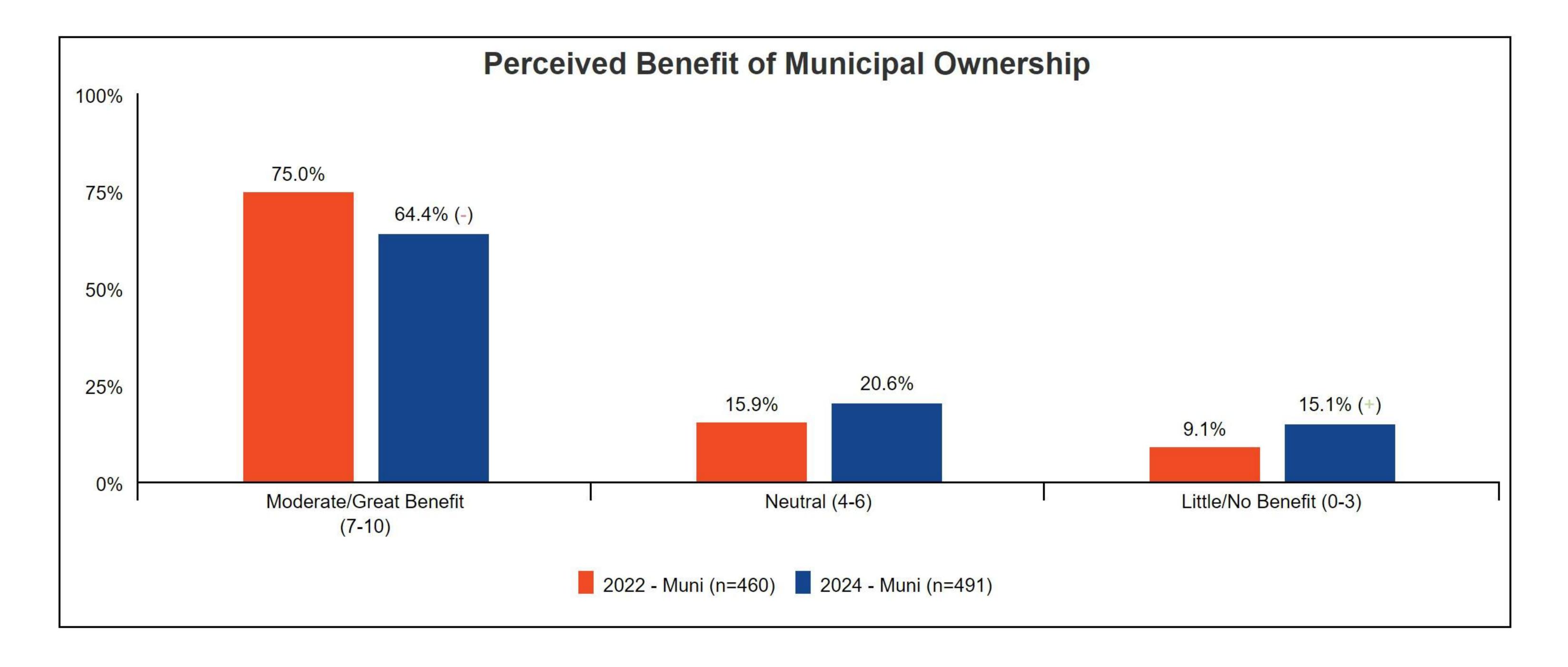




## Utility Preference

### Utility Preference | Benefit of Municipal Ownership

Nearly two-thirds of muni respondents reported that the local area benefits from having a community-owned municipal utility, a significant decrease from 2022 findings (-10.6 percentage points).



Q33: On a scale of zero to ten, where zero (0) is "no benefit" and ten (10) is "great benefit," how much benefit does the local area realize from having a community-owned municipal utility?



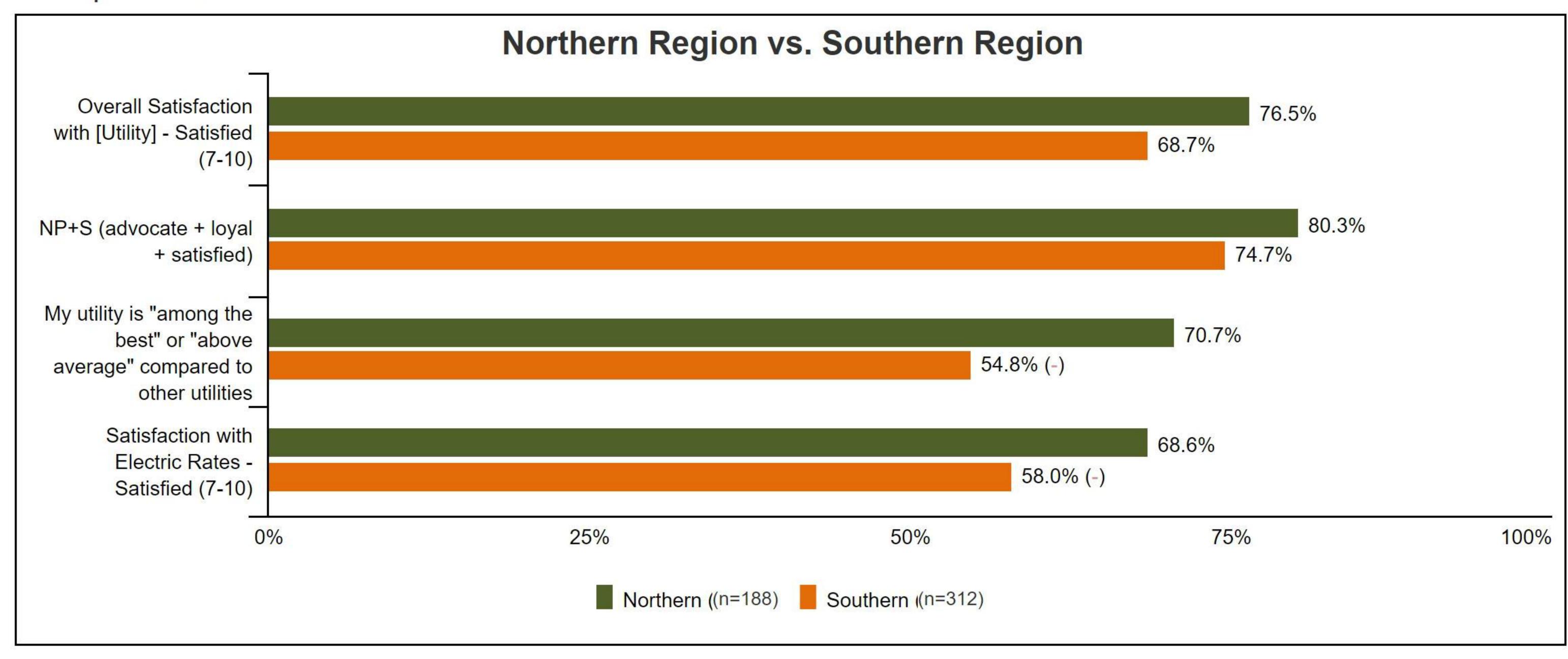


## A Closer Look

Regional Comparison
Company Size Comparison

#### A Closer Look | Regional Comparison

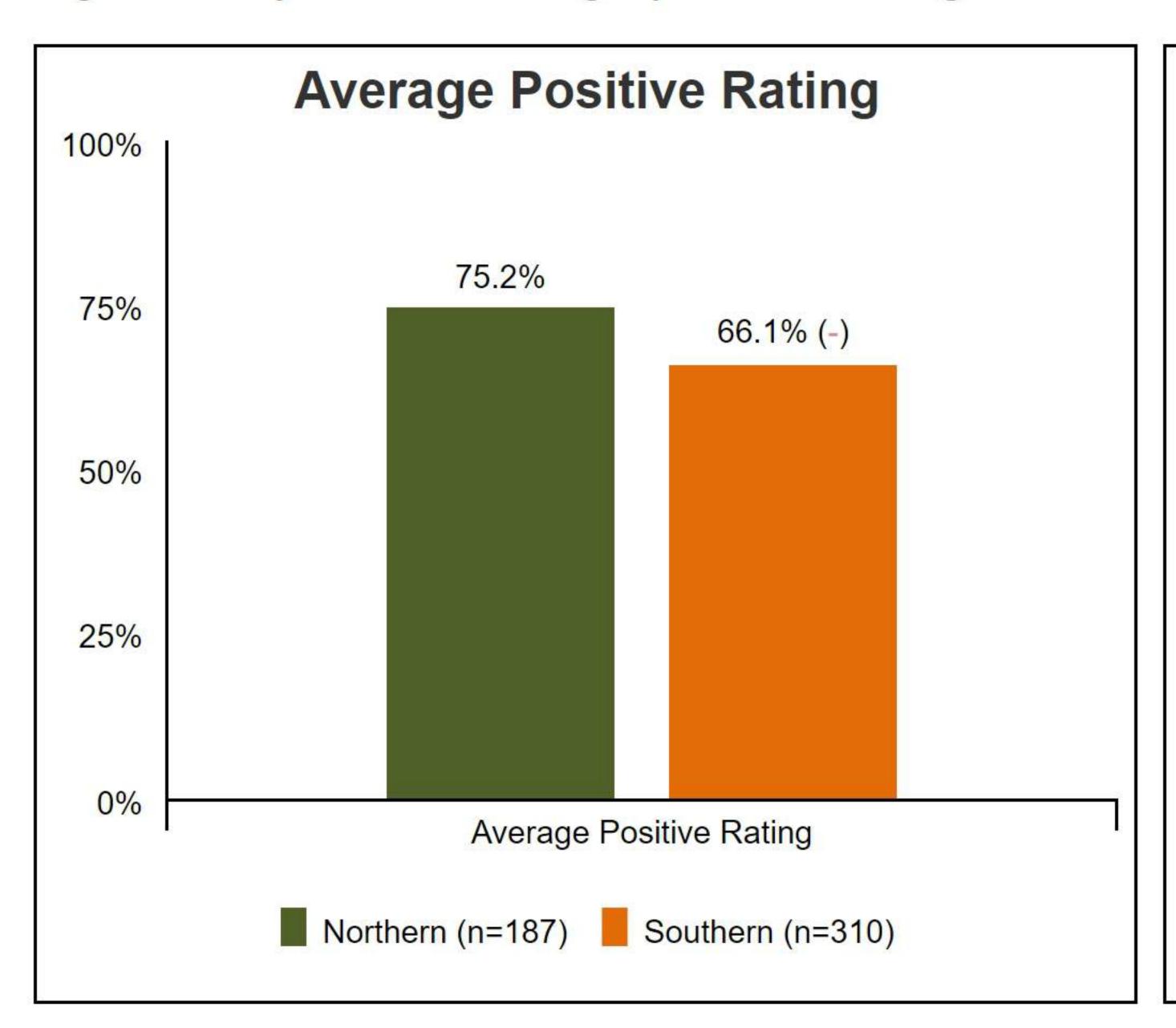
Slightly fewer Southern region muni respondents provided positive ratings for their overall satisfaction and indicated they were either "an advocate for their utility," "a loyal customer," or "a satisfied customer" compared to Northern region muni respondents. Furthermore, significantly fewer Southern region muni respondents indicated their utility is "among the best" or "above average" compared to other utilities, and fewer provided positive ratings for their satisfaction with their electric rates compared to Northern region muni respondents.



(+/-) indicates statistical significance at a 95% confidence level, denoting whether the data point is higher or lower than the compared subgroup

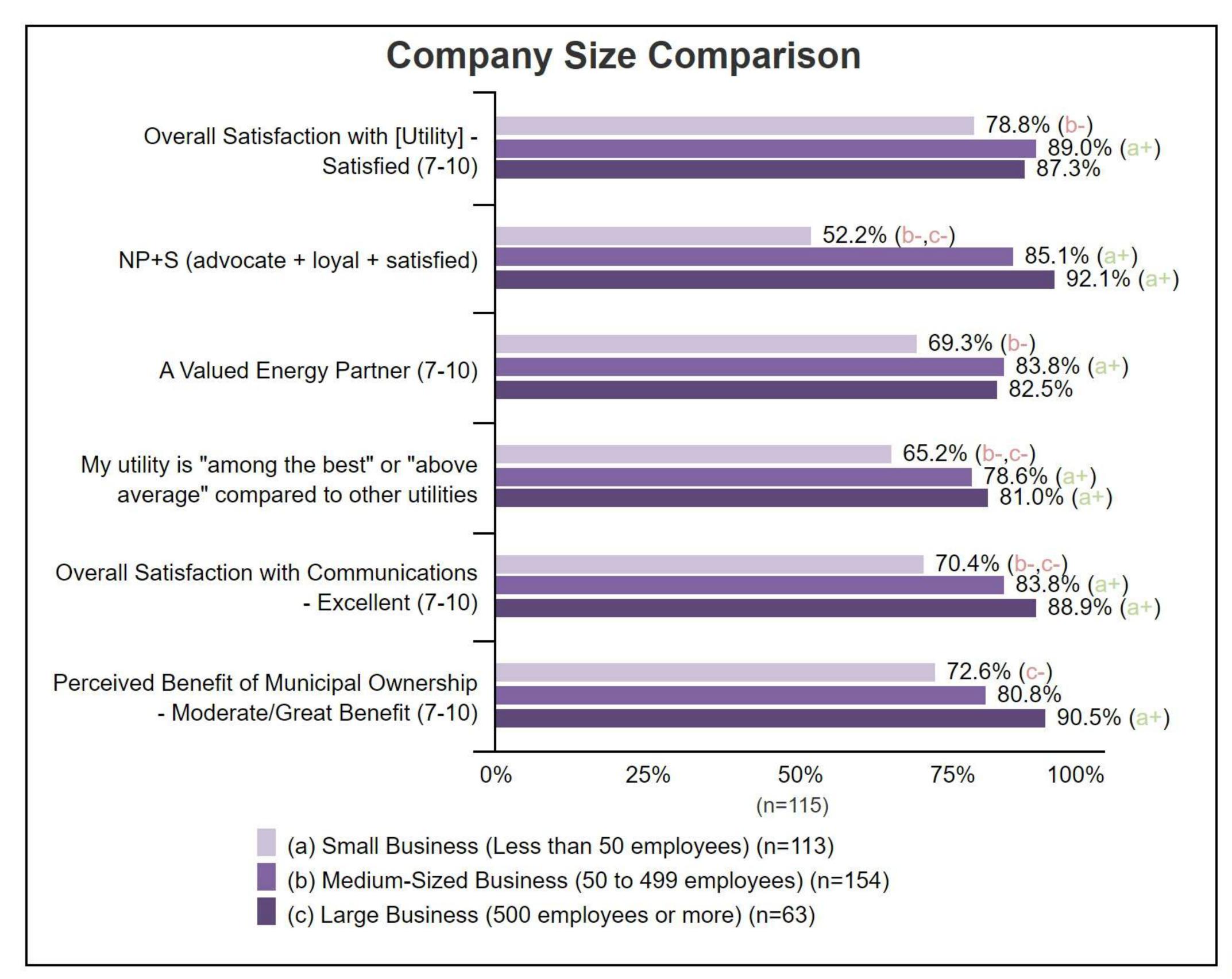
#### A Closer Look | Regional Comparison

Significantly fewer Southern region muni respondents provided positive ratings for their utility's ability to provide "timely information about restoration during an outage" compared to Northern region muni respondents (-13.9 percentage points). Further, slightly fewer Southern region muni respondents provided positive ratings for their utility's ability to provide "reliable electricity" (-7.5 percentage points) and "restore power quickly after an outage" (-5.8 percentage points). This resulted in a significantly lower average positive rating for the Southern region compared to the Northern region (-9.1 percentage points).



Exceller	nt (7-10)
Excellent (7-10)	
Northern	Southern
75.9%	68.4%
73.8%	68.0%
75.9%	62.0%
	75.9% 73.8%

#### A Closer Look | Company Size Comparison



The data suggests that fewer small businesses had a high level of satisfaction and a highly positive perception of their utility compared to medium and large businesses.

Most notably, significantly fewer small businesses indicated they are "an advocate for their utility," "a loyal customer," or "a satisfied customer" compared to medium and large businesses. Additionally, the perceived benefit of municipal ownership appears to increase as company size increases, with fewer small businesses seeing a benefit compared to large businesses.

(+/-) indicates statistical significance at a 95% confidence level, denoting whether the compared subgroup

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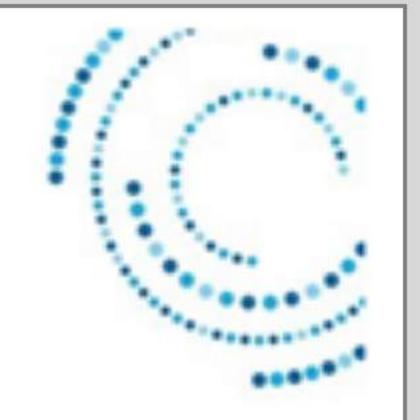
SECTION FOUR Considerations

Aggregate Data (Provided Separately)



#### Considerations





#### Continue to Guide Customers on Electrification

With most muni respondents planning to comply or actively comply with California's electrification mandates and regulations, and many planning to implement electrification projects in the near future, it is imperative that CMUA utilities continue to support their business and key account customers in these efforts. Over two-thirds of municipal respondents indicated that their utility had been helpful in providing advice and assistance on electric vehicles and charging stations. This suggests that CMUA utilities have been overall successful in aiding their business and key account customers in electrification, but there are still opportunities to provide additional support and resources to ensure utilities are able to adopt electric vehicles and charging stations in an efficient manner.

The data suggests a continued trend of electrification, with the majority of muni respondents indicating they are actively electrifying their building and fleet and an increased amount of muni respondents indicating they are expanding their electric vehicle fleet and charging station supply in the future. CMUA utilities should aim to maintain their role as a guide for their commercial customers and expand their resources to further support electrification, thereby improving already strong customer satisfaction.

#### Considerations





#### Small Businesses: Engaging and Building Stronger Relationships

The data found that fewer small businesses were highly satisfied overall with their utility, had a positive perception of their utility, saw their utility as a valued energy partner, were satisfied with their utility's communication, and viewed it as beneficial that their utility is a community-owned municipality compared to medium-sized and large businesses. Below are two recommended steps that CMUA Utilities should consider in their small business strategy that may help address the discrepancies listed above.



Improved Communication and Cooperation
When asked what their utility could do to improve the way it serves them, 41.7% of small businesses indicated "improved communication," 38.3% indicated "programs and rebates for efficiency and conservation," and 27.8% indicated "assistance with electric service improvements." Furthermore, 93.8% of small businesses that provided positive ratings for their utility's overall communication also provided positive ratings for their overall satisfaction, and 90.1% of small businesses that provided positive ratings for their utility's overall communication also viewed their utility as a valued energy partner. Therefore, CMUA Utilities should focus on improving communication with their small business accounts in order to build a partnership with them and increase their satisfaction.



Over two-thirds of small businesses (69.6%) plan to expand their fleet of electric vehicles in the future, and 64.3% plan to acquire additional on-site electric vehicle charging stations. This interest in fleet electrification presents an opportunity for CMUA Utilities to guide their small business accounts with their fleet electrification knowledge and by pushing any fleet electrification incentive/rebate programs, helping to build stronger relationships with small business accounts.

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