

# Shifting customer connections and perceptions

Findings from the 2024 State of the Utility Customer Survey

Jamie Wimberly, SVP, E Source



We know utilities.

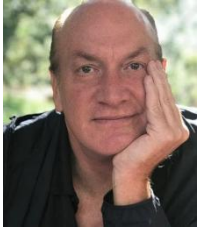
February 13, 2025

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# Agenda

- The Utility Customer Research Consortium
- Survey overview
- Detailed results
- Summary of 2024 findings

# Speakers



**Jamie Wimberly**

Senior Vice President,  
Utility Customer Strategy  
E Source

# The Utility Customer Research Consortium

# Roster of UCRC members



# UCRC Executive Leads

**ACI:** Chuck Layman, Director  
**AEP:** Stacey Gabbard, VP  
**Austin Energy:** Jerry Galvan, VP  
**Austin Energy:** Richard Genece, VP  
**Avista:** Latisha Hill, CCO  
**ComEd:** Melissa Washington, SVP  
**Continuum:** Rose Dean, Director  
**Exelon:** Morlon Bell-Izzard, CCO  
**Exelon:** Erica Borggren, VP  
**Exceleron:** Jeff Weiser, CEO  
**First Energy:** Steven Avila, VP  
**Grid X:** Scott Engstrom, CCO  
**JEA:** Charles Moreland, CCO  
**LADWP:** Estela Tieman, Asst. General Manager

**NiSource:** Kim Cooks, SVP  
**Northwestern:** Bobbi Schroepel, VP  
**Oncourse Home Solutions:** Phil Edens, CCO  
**Open Intelligence:** Hernando Parrott, President  
**PECO:** TBD  
**Pepco:** David Vosvick, VP  
**PG&E:** Marlene Murphy-Roach, Senior Director  
**Promise Pay:** Nicole Howard, SVP  
**Salt River Project:** Vanessa Kisicki, CCO  
**Seattle City Light:** Kathryn Aisenberg, Director  
**SMUD:** Brandy Bolden, CCO  
**TECO:** Karen Sparkman, VP  
**Tucson Electric Power:** Denise Taylor, Director  
**WE Energies:** Michelle Mattson, Director

# Overview of the UCRC

The Utility Customer Research Consortium (UCRC) is a blue-ribbon panel of executives working together to identify opportunities for improvement and innovation in customer service and care. The UCRC members represent large energy utilities and leading vendors from across the US. The current membership represents over 70 million customers.

The UCRC emphasizes peer-to-peer interaction and information sharing. The members meet annually to consider customer-facing challenges and opportunities, and to plan the UCRC research agenda. In addition, they interact regularly through online “spotlight” calls to investigate emerging customer-facing issues and solutions. Finally, the UCRC is committed to working with the members to conduct collaborative research and consumer surveys, and to develop other content to enrich the dialogue among members and to provide thought leadership in the utility sector.

The UCRC focuses on short-term tactical and operational challenges and develops a forward-looking strategic vision for future customer experience and engagement.

# The UCRC difference



**Peer group.** With more than 25 member utilities and growing, the UCRC has a track record of bringing together utility customer service executives and their teams to facilitate collaboration and information exchange.



**Focus.** The UCRC is unique in that we have always focused on both the tactical (first-contact resolution, process improvements, etc.) and the strategic (DILo video, Vision 2020 video, change management, etc.) issues that directly affect utility customer strategy and operations.



**History.** We have a 20-year history, representing extensive knowledge, research findings, and initiatives to draw from now and in the future.



**Forward looking.** The UCRC has proved useful in developing a forward-looking perspective, being consistently ahead of the curve regarding standards, customer experience, and operational improvements.



**Actionable.** The UCRC team consistently seeks opportunities to leverage the findings and recommendations from the research to address specific issues and objectives at individual member companies.



# Survey overview

# 2024 State of Utility Customer Overview

Is utility customer strategy at a crossroads of history?

## A pivotal moment

The utility sector is at a pivotal moment. While electrification and clean energy offer great promise, rising electricity prices are burdening more Americans.

## CSAT is down

The 2024 State of Utility Customer Survey highlights these tensions, showing a decline in customer satisfaction due to affordability issues and perceptions of cost-shifting.

## Trust is up

Customers still trust their utilities, with 40% likely to recommend them as a good workplace. However, 28% would choose a different provider, and 47% would go off-grid if possible.

# Research Methodology

The Russell Omnibus was conducted via the internet among 1,023 adults 18 years of age or older from October 4–7, 2024. Figures for gender, age, ethnicity, and geography were weighted where necessary to match their actual proportions in the population. The bases shown in this report are the unweighted bases.

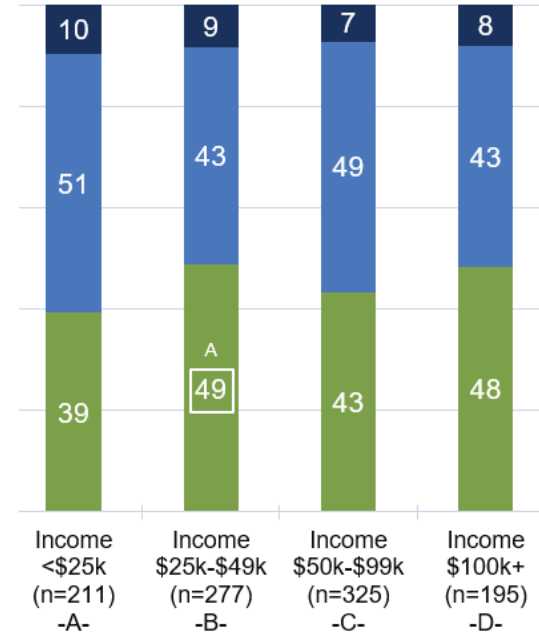
An invitation to participate in the study was sent by e-mail to panel members who have agreed to be contacted by Russell Research and interviewed over the Internet.

- Participating respondents were interviewed online at a secure Russell Research URL programmed for this study.
- Sample was provided to Russell Research from a leading sample provider.
- All research was carried out in compliance with all relevant legal and ethical requirements within the market and in compliance with ISO 20252:2019.

# The boxes tell a story

The following statistical notation is used throughout the report:

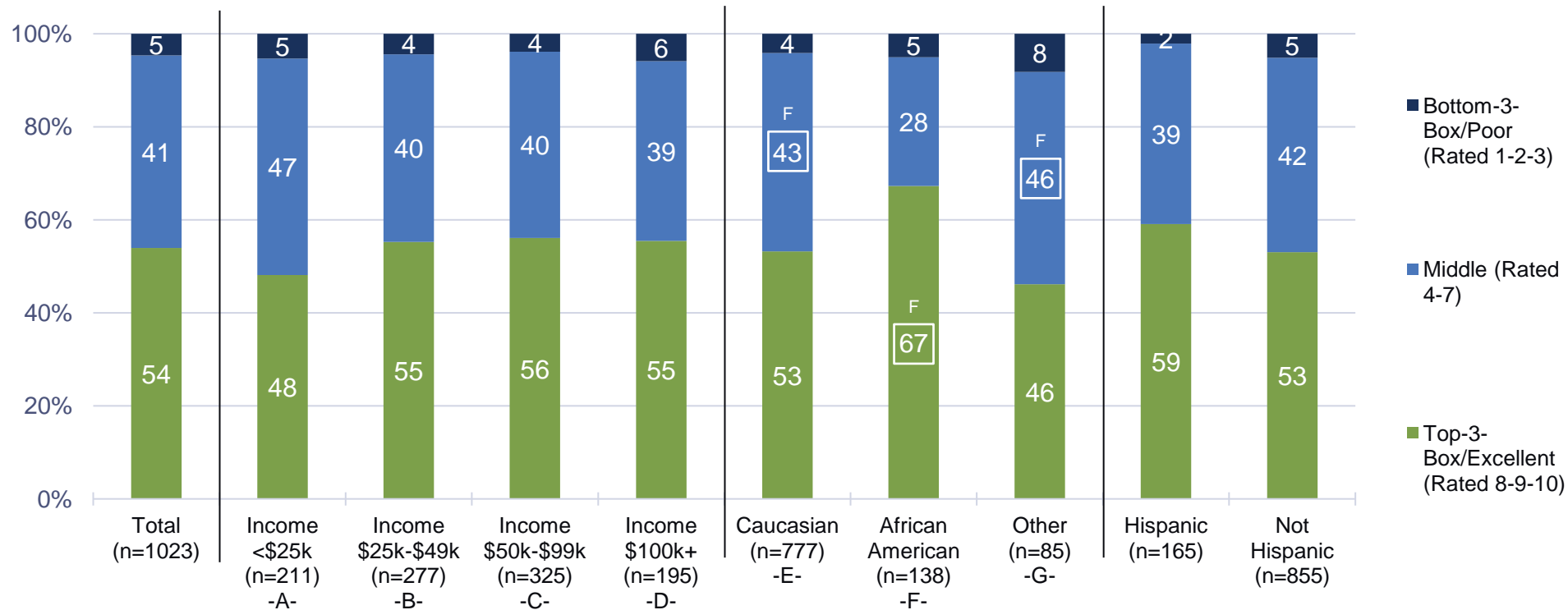
= Indicates figure is significantly higher than the other/indicated subgroup at a 95% confidence level



Example: Column B has a large difference with Column A

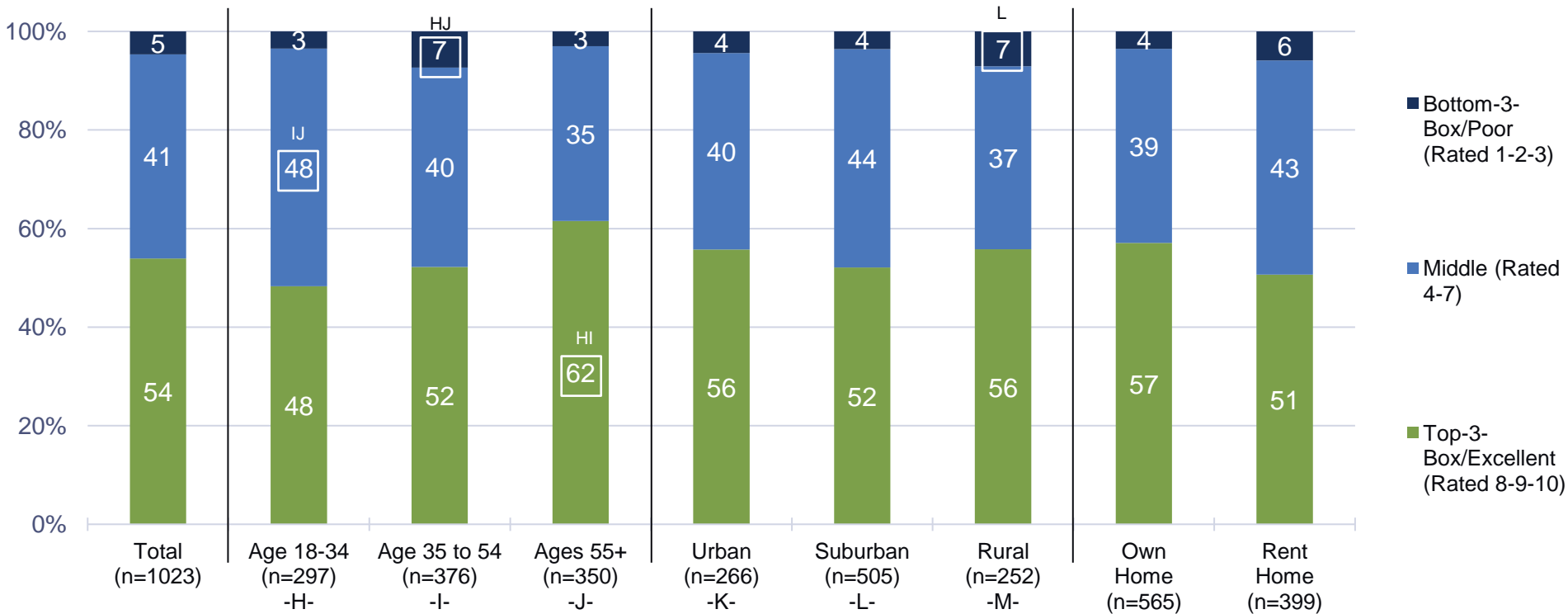
# Detailed results

# Rating of past-year electric utility customer service



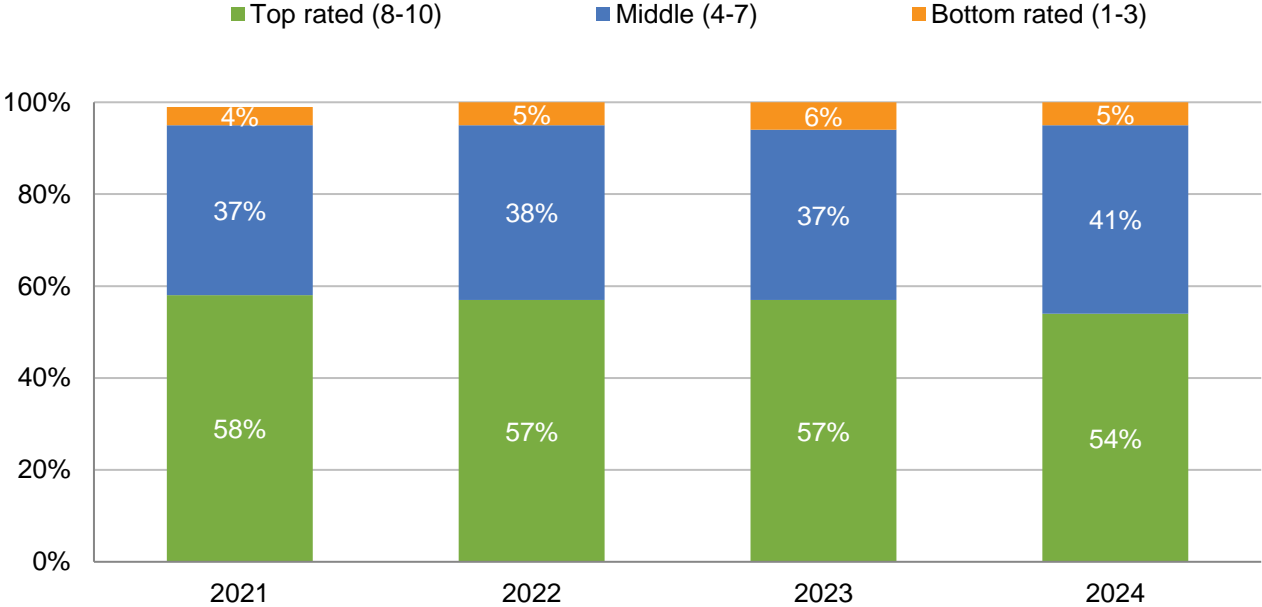
Base: Total Respondents. B1. Overall, how would you rate the customer service you have received from your local electric utility in the past year? (Rated Excellent to Poor)

# Rating of past year electric utility customer service (cont.)



Base: Total Respondents. B1. Overall, how would you rate the customer service you have received from your local electric utility in the past year? (Rated Excellent to Poor)

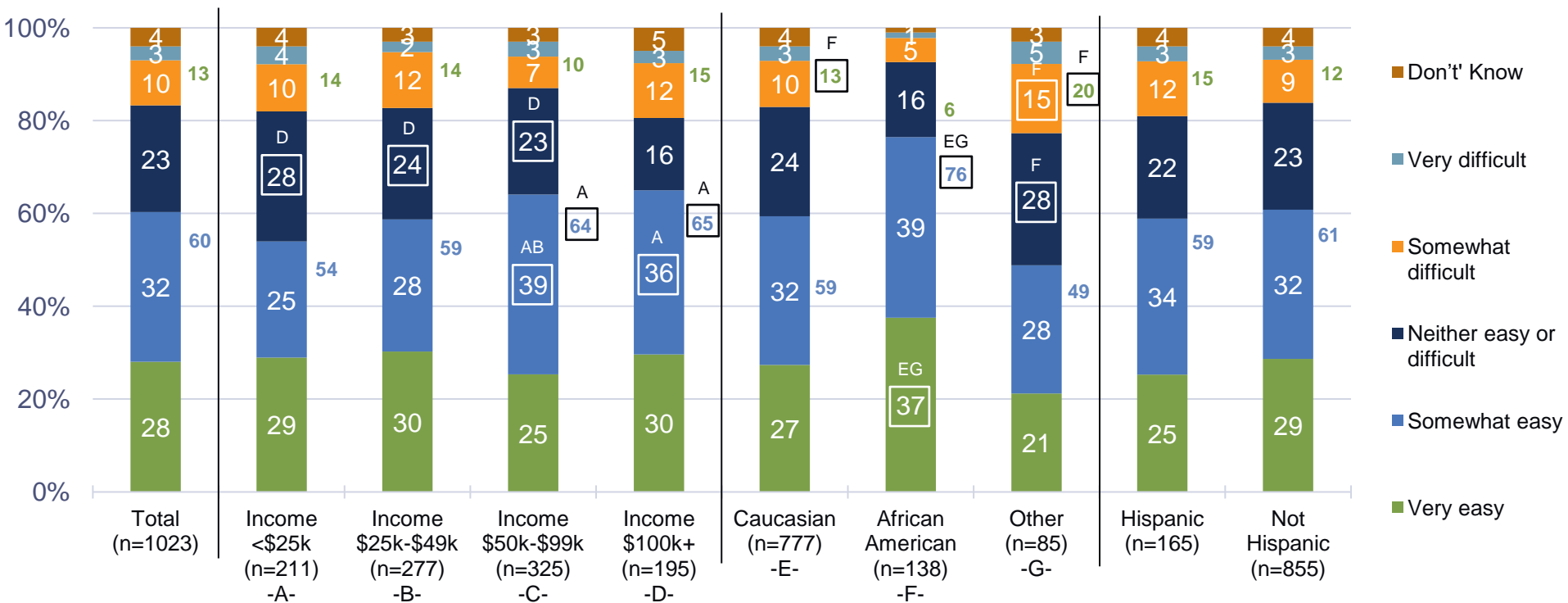
# Rating of customer service (2021–2024)



© E Source. **Question:** Overall, how would you rate the customer service you have received from your local electric utility in the past year?

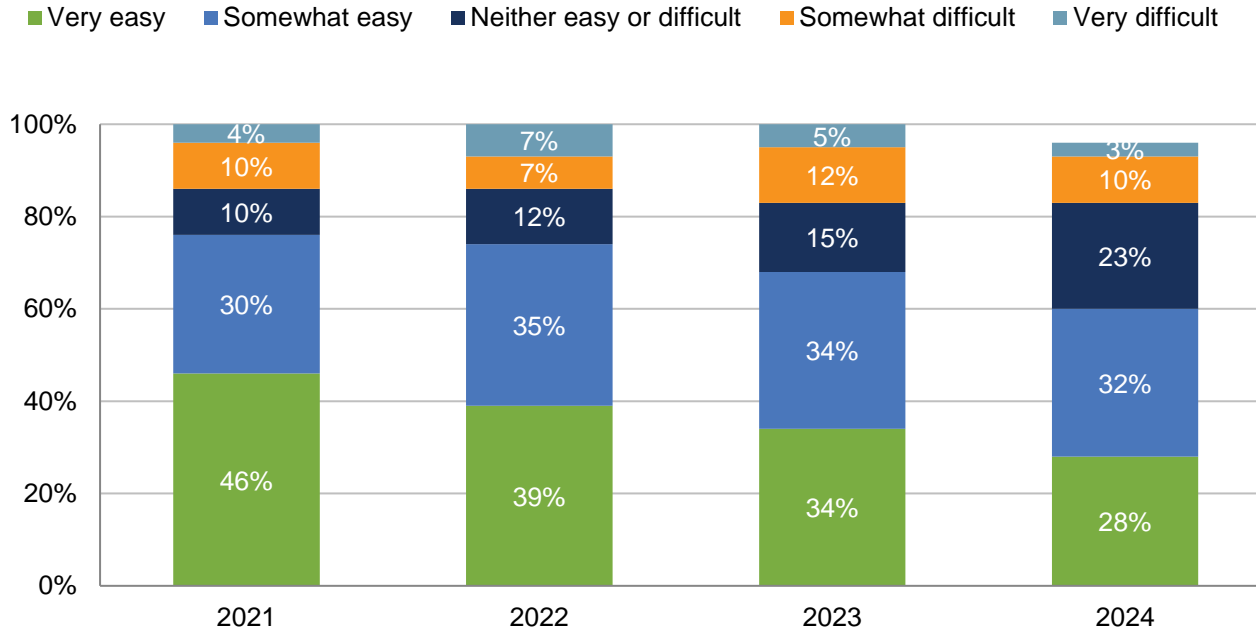


# Ease of interacting with electric utility



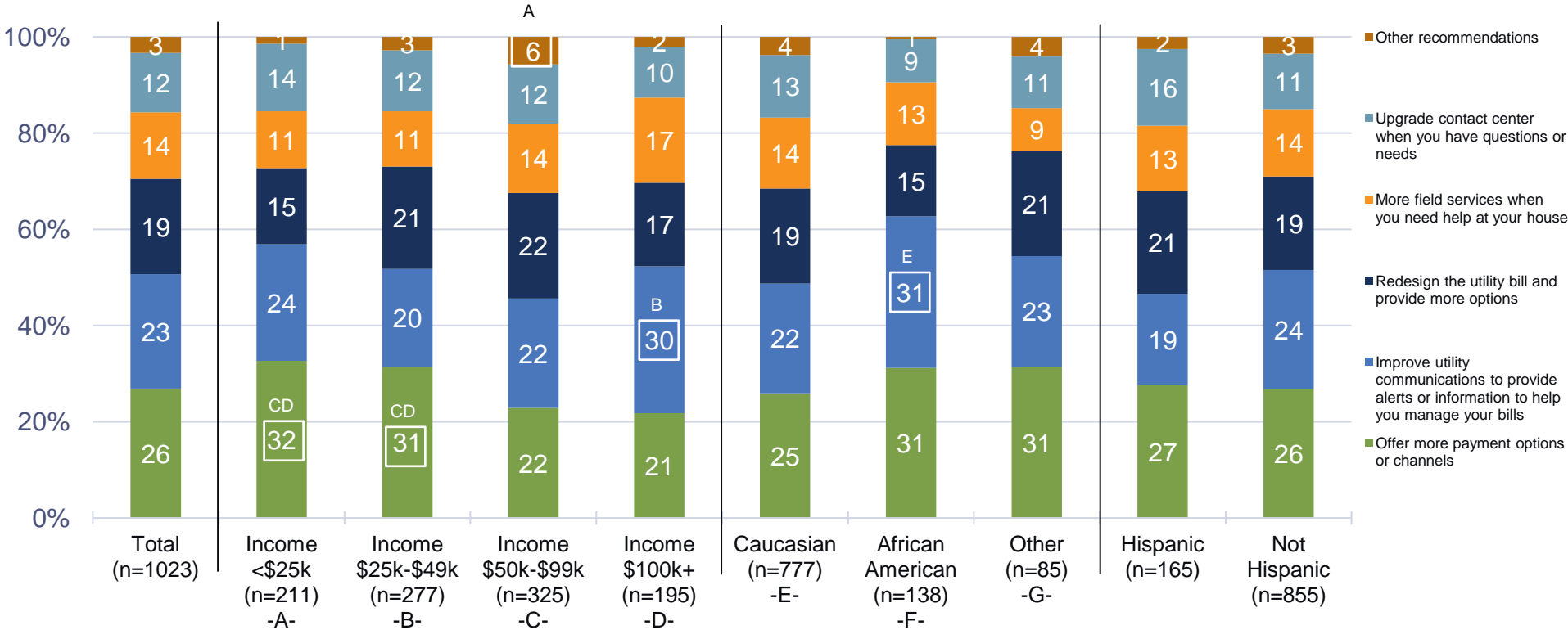
Base: Total Respondents. B6. How easy or difficult would you say it was to interact with your electric utility?

# Ease of interacting with electric utility (2021–2024)



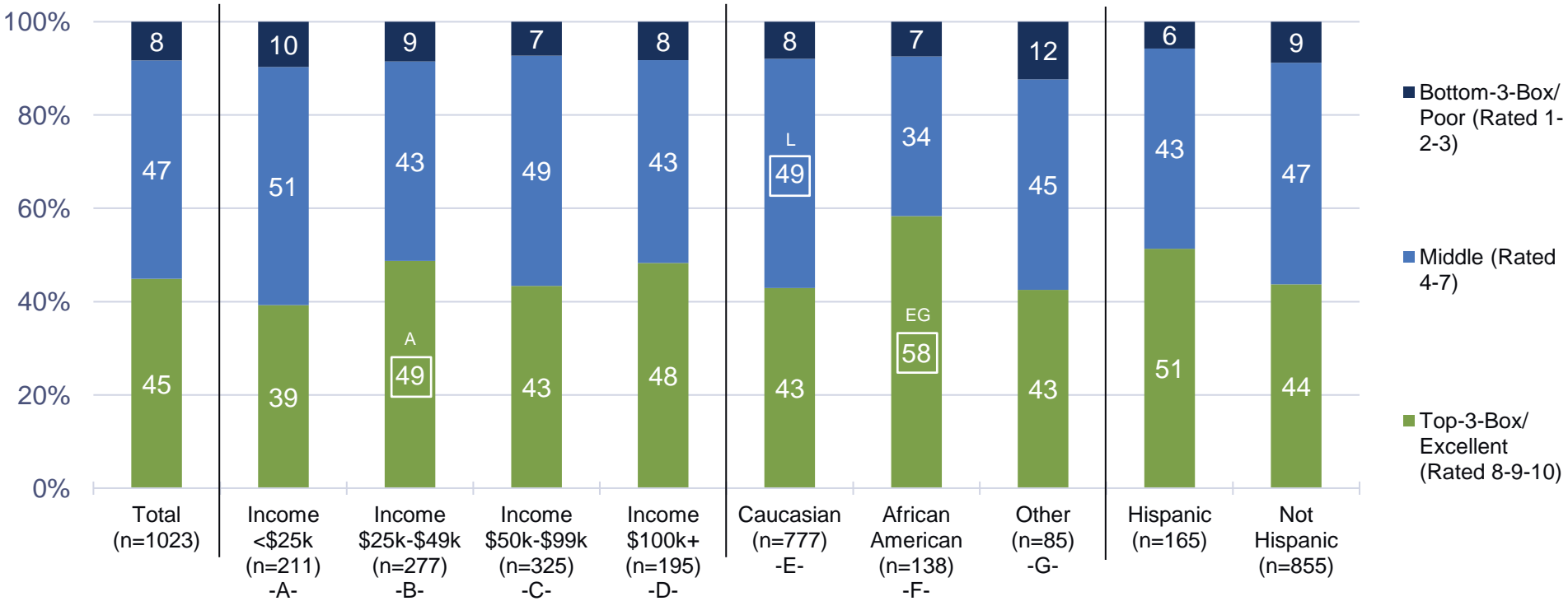
© E Source. **Question:** How easy or difficult would you say it was to interact with your electric utility? **Notes:** 2024 survey included a response option of “Don’t know” that accounts for about 4% of response data.

# Recommendation for main focus of utility executives



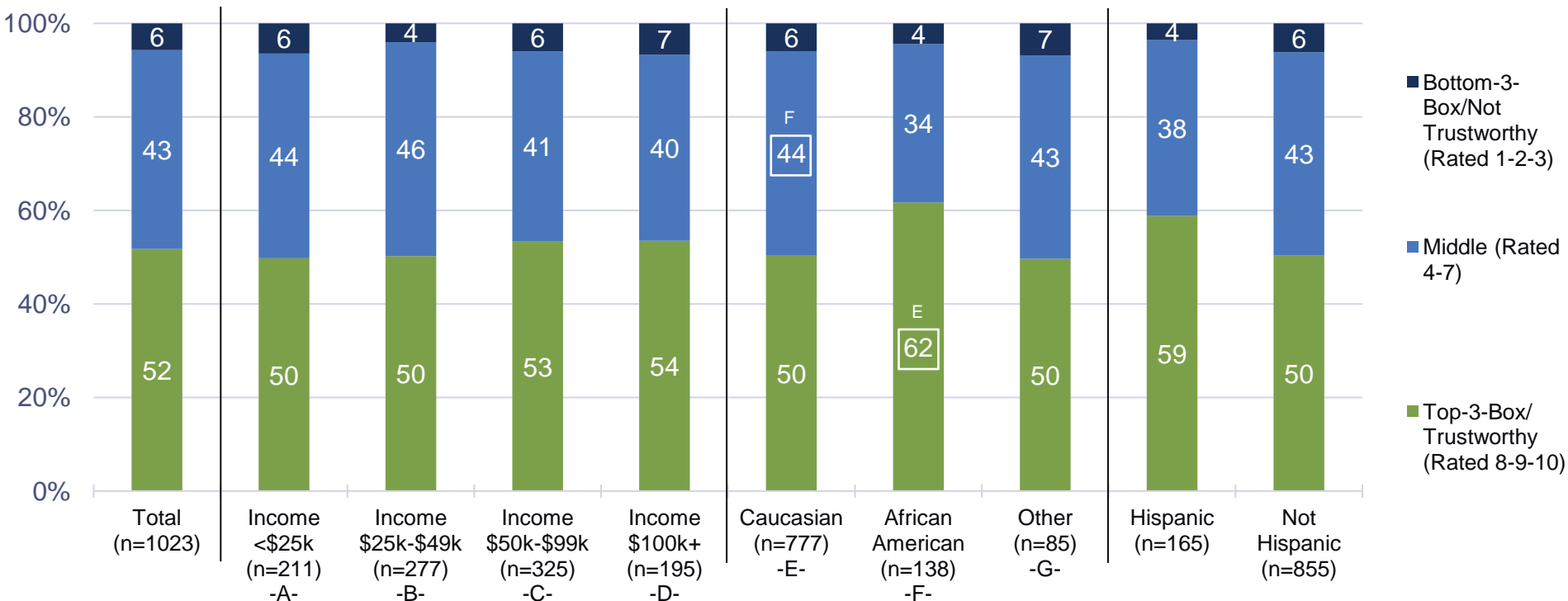
Base: Total Respondents. B4j. There are many different facets to how a utility operates to serve customers. If you could give a recommendation to the utility executive in charge of the utility's customer operations, what would you recommend that the utility focus on to better serve customers like yourself?

# Rating of utility's "caring about you"



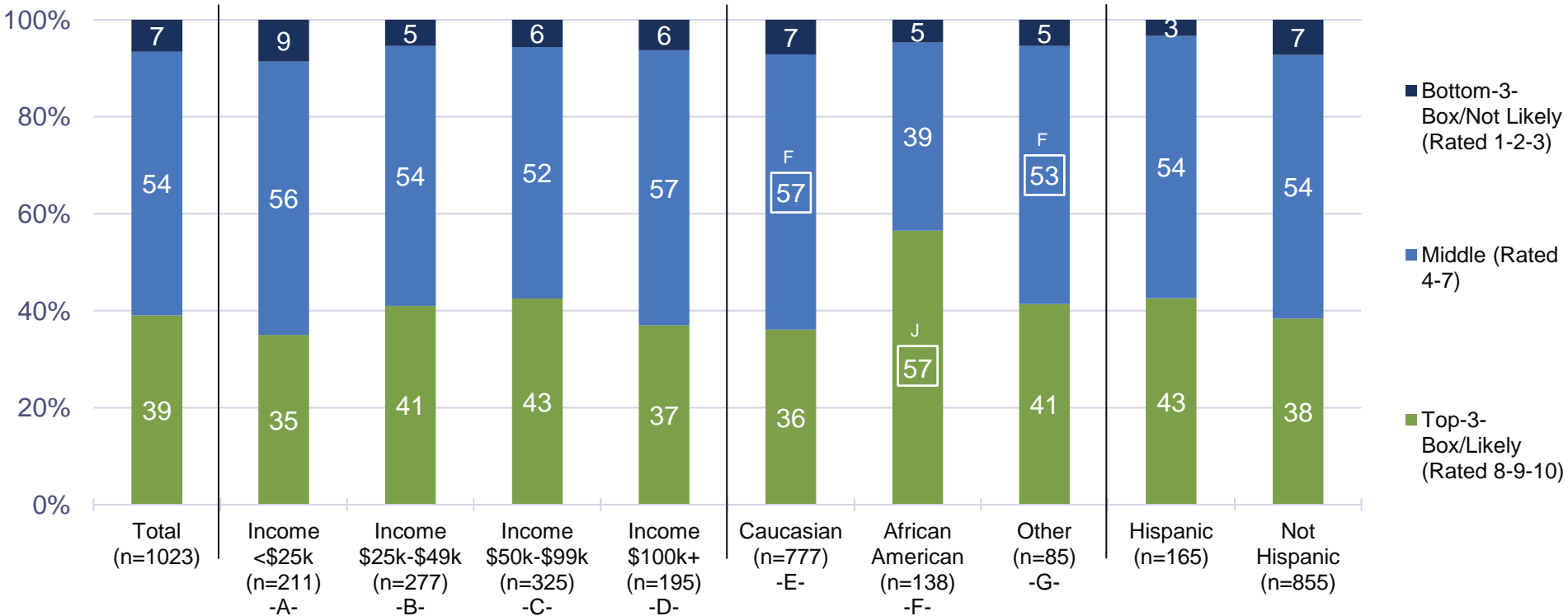
Base: Total Respondents. B3a. How would you rate your utility for caring about you as a customer with individual needs and preferences? (Rated Excellent to Poor)

# Rating of electric utility as a trusted energy adviser



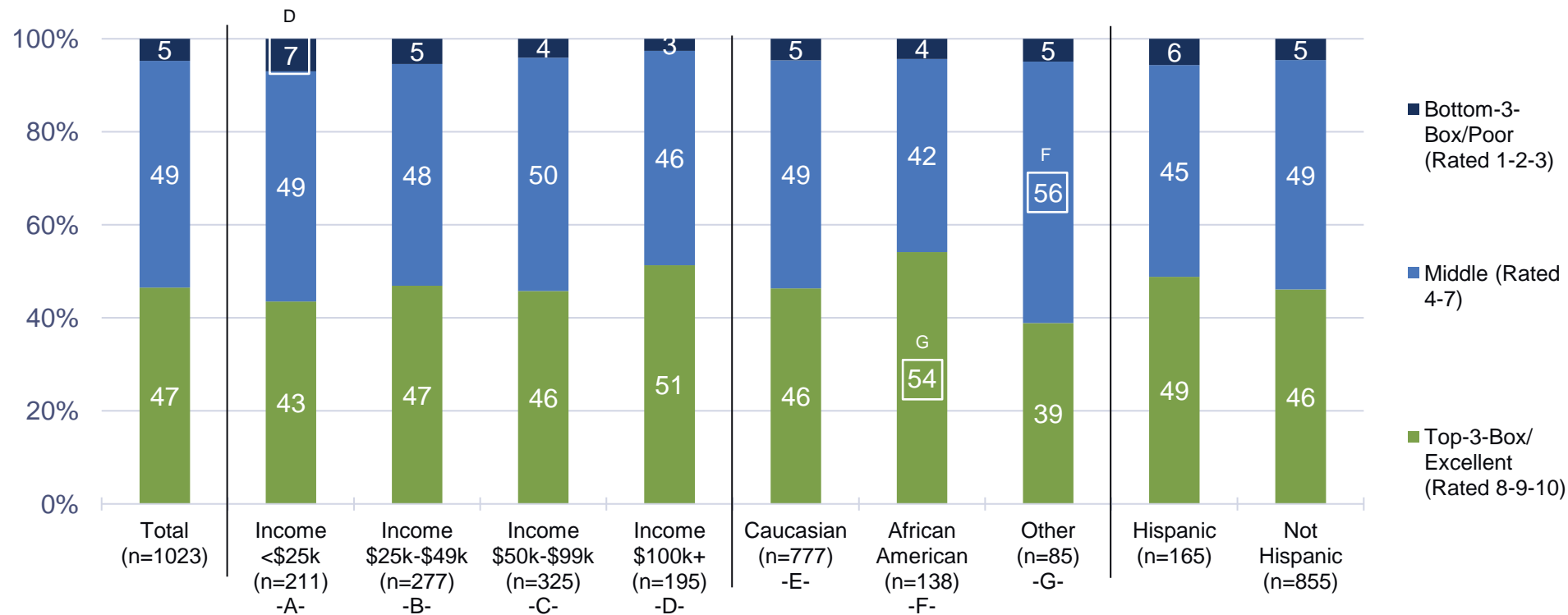
Base: Total Respondents. B3. How would you rate your electric utility as a trusted energy advisor? (Rated Extremely Trustworthy to Not Trustworthy At All)

# Likelihood to recommend entering local utility workforce



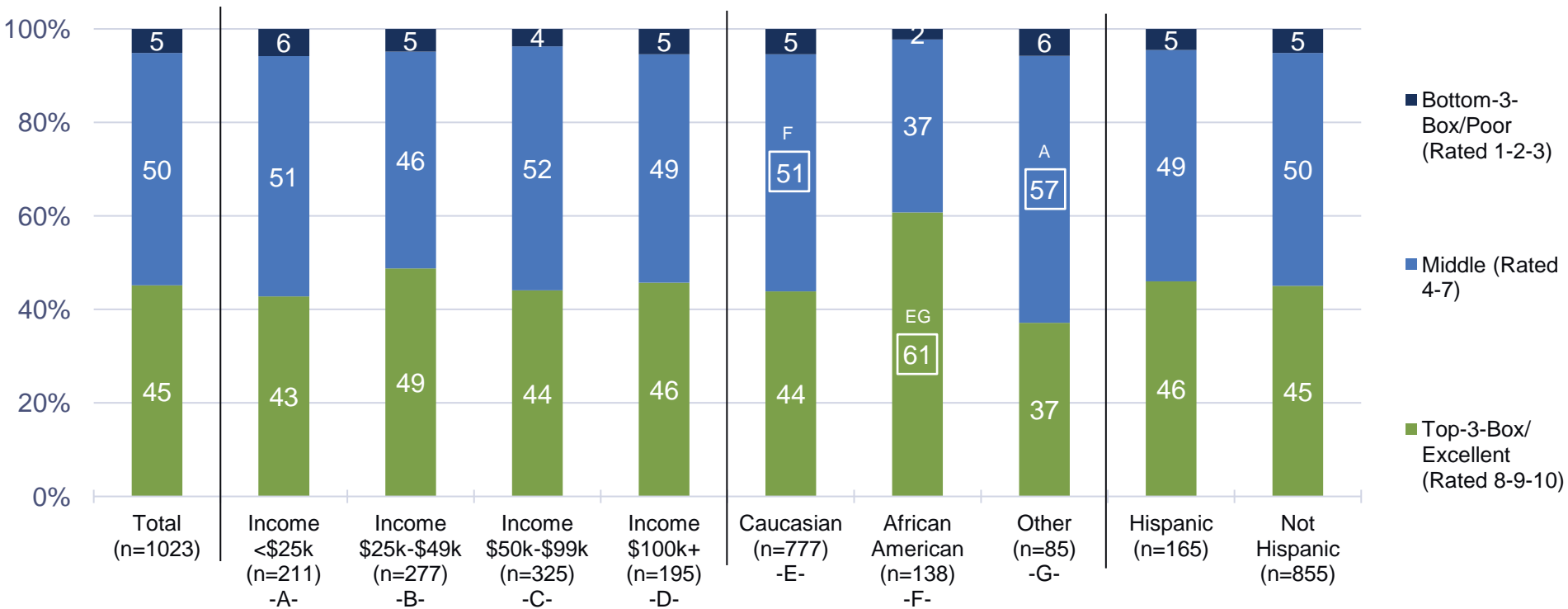
Base: Total Respondents. B17. For young people entering into the workforce, how likely would you be to recommend to them to think about working for their local electric utility? (Rated Extremely Likely to Not at All)

# Perception of utility's ability to serve customers online



Base: Total Respondents. B30.What is your perception of your utility's ability to serve you online in regard to digital payments, customer support online, or other needs? (Rated Excellent to Poor)

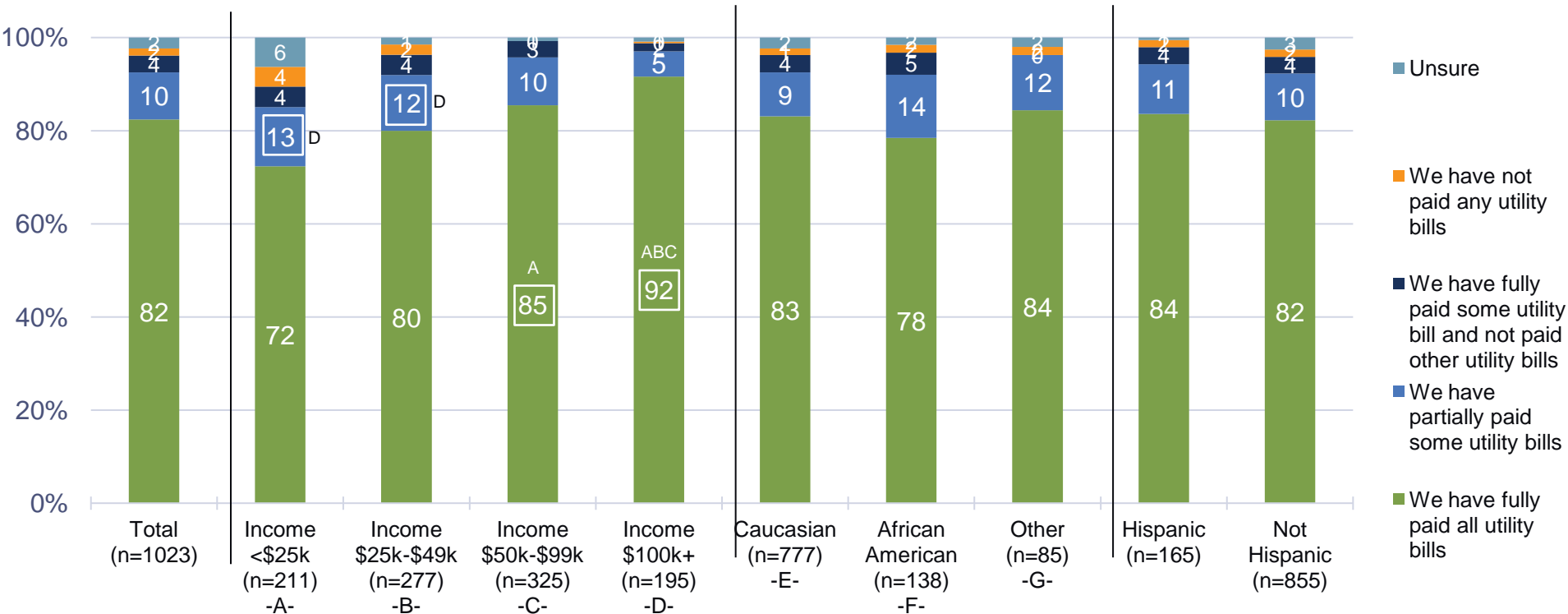
# Ability to protect personal accounts from cyber threats



Base: Total Respondents. B31. How would you rate your utility's ability to protect your personal account information from cybersecurity threats? (Rated Excellent to Poor)

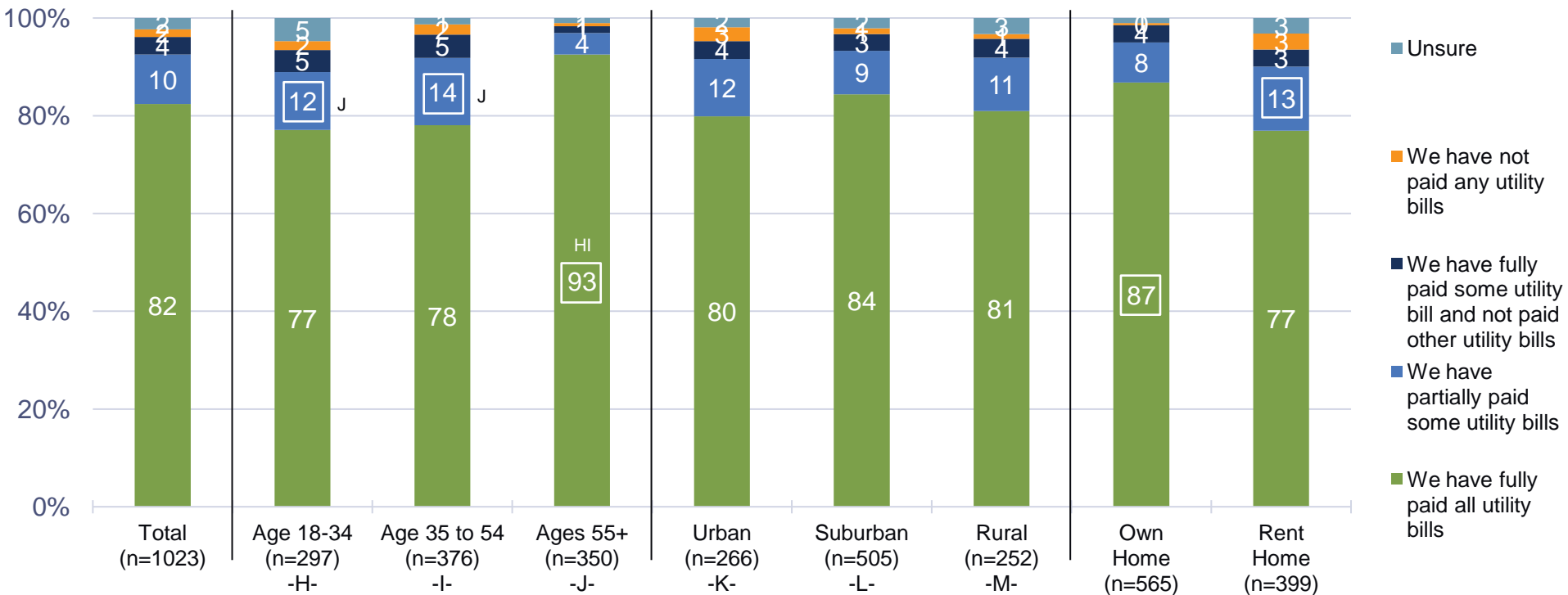


# Paid utility bills during past year



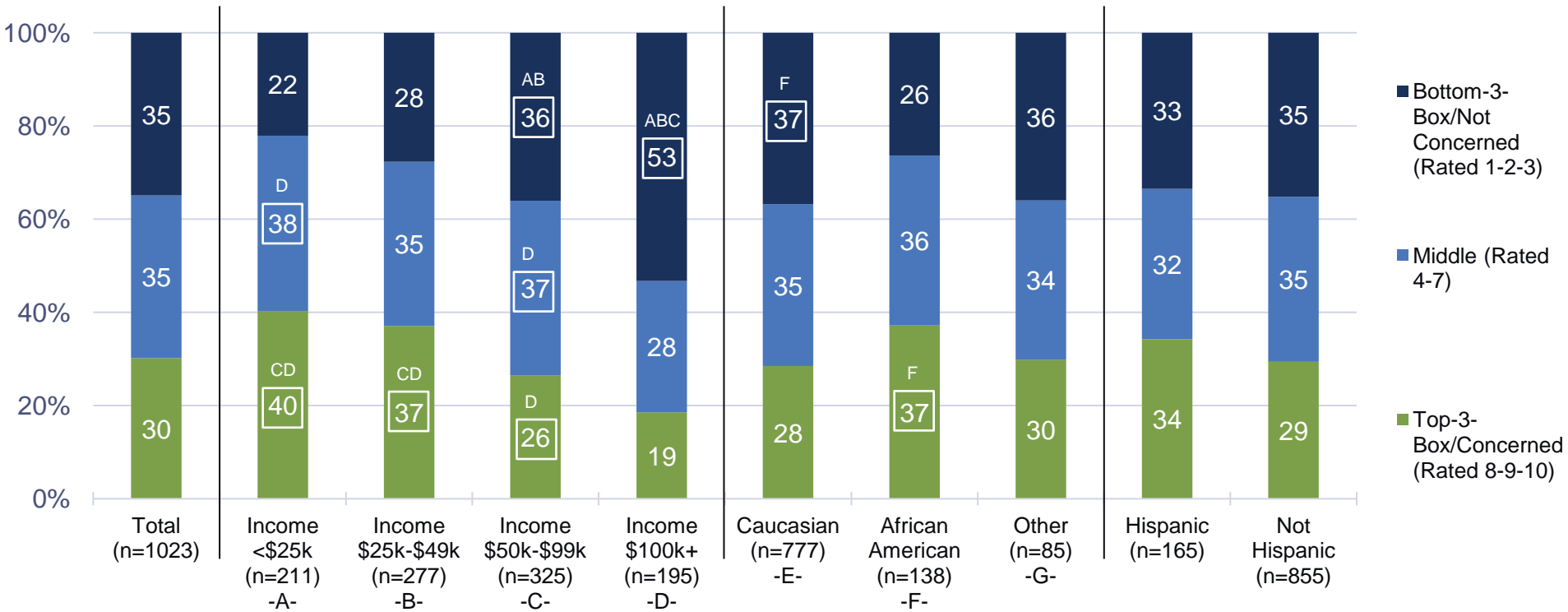
Base: Total Respondents. B4d. Which of the following best describes whether your household has paid utility bills during the past year?

# Paid utility bills during past year (cont'd.)



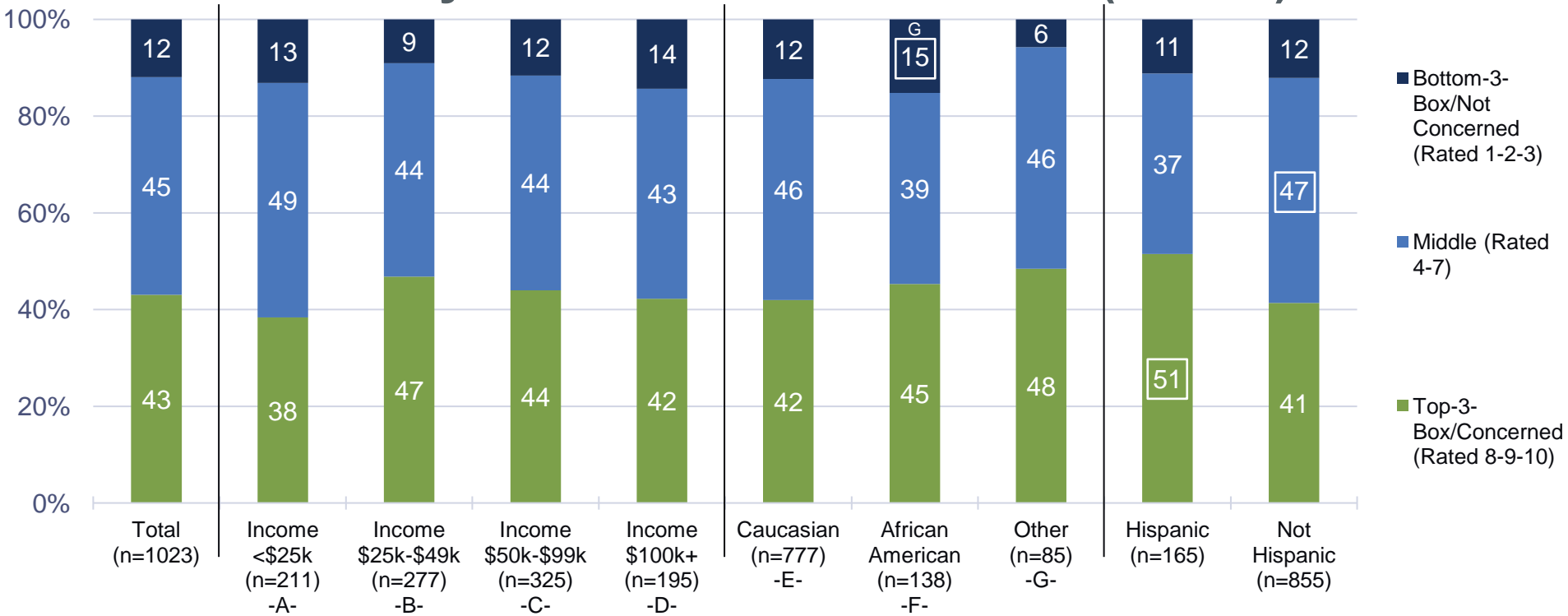
Base: Total Respondents. B4d. Which of the following best describes whether your household has paid utility bills during the past year?

# Concern about household's ability to stay current on utility bills over next 6 months



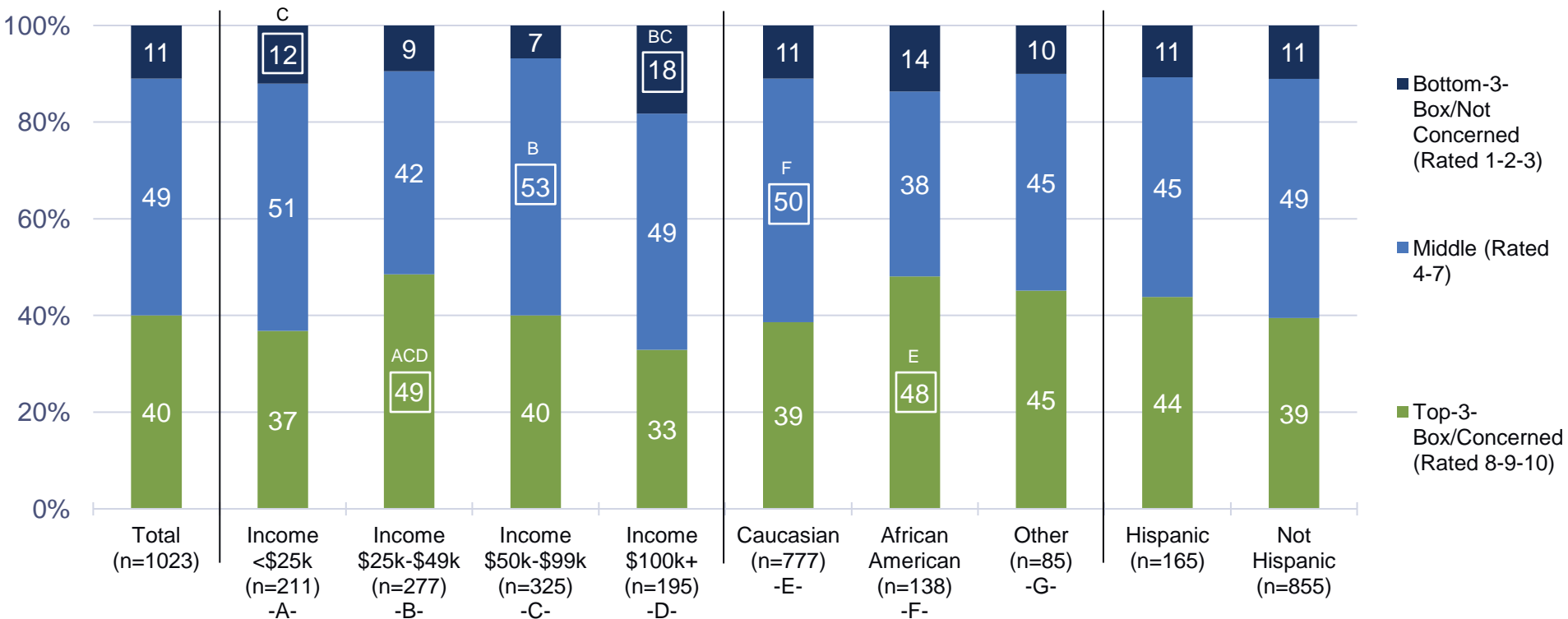
Base: Total Respondents. B4e. How concerned are you about your household's ability to stay current on utility bill payments over the next six months? (Rated Not Concerned at All to Extremely Concerned)

# Concern about household's ability to stay current on utility bills over next 6 months (cont'd)



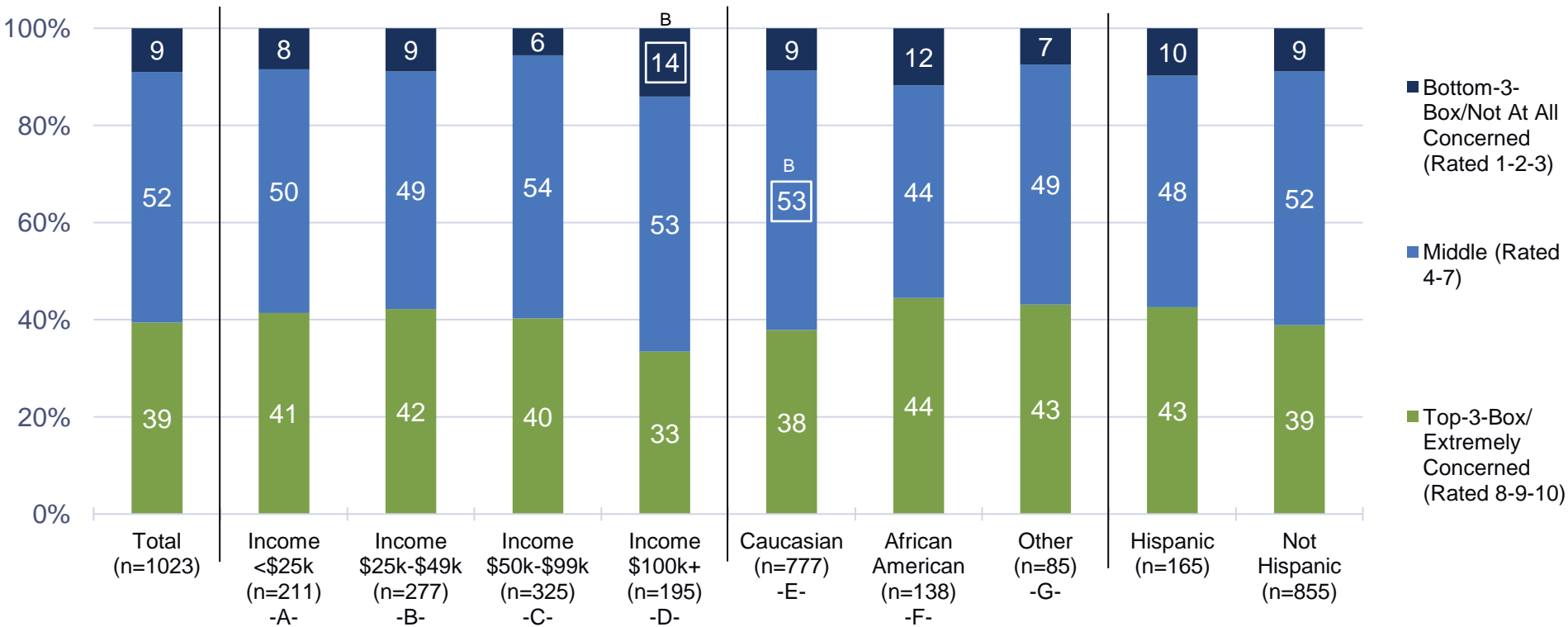
Base: Total Respondents. B8e. How concerned are you that your utility bill may be higher because of other customers not paying their utility bills? (Rated Not Concerned At All to Extremely Concerned)

# Concerns over costs shifted to bill for renewable energy and electric vehicles



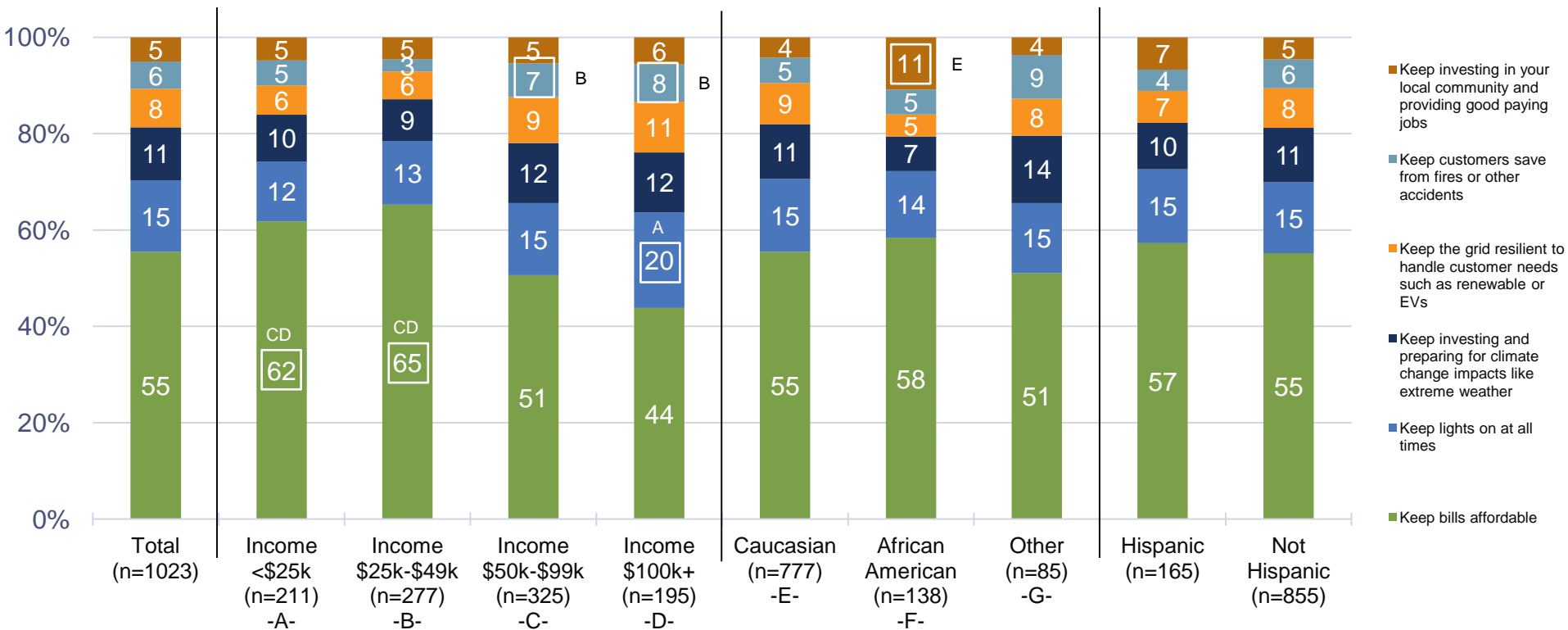
Base: Total Respondents. B21b. Let's say you either can't afford or simply don't desire renewable energy or electric vehicles. How concerned are you that costs are being shifted onto your bill to invest in and maintain infrastructure to support renewable energy and electric vehicles? (Rated Extremely Concerned to Not Concerned at All)

# Concern over data center energy costs leading to higher utility bills



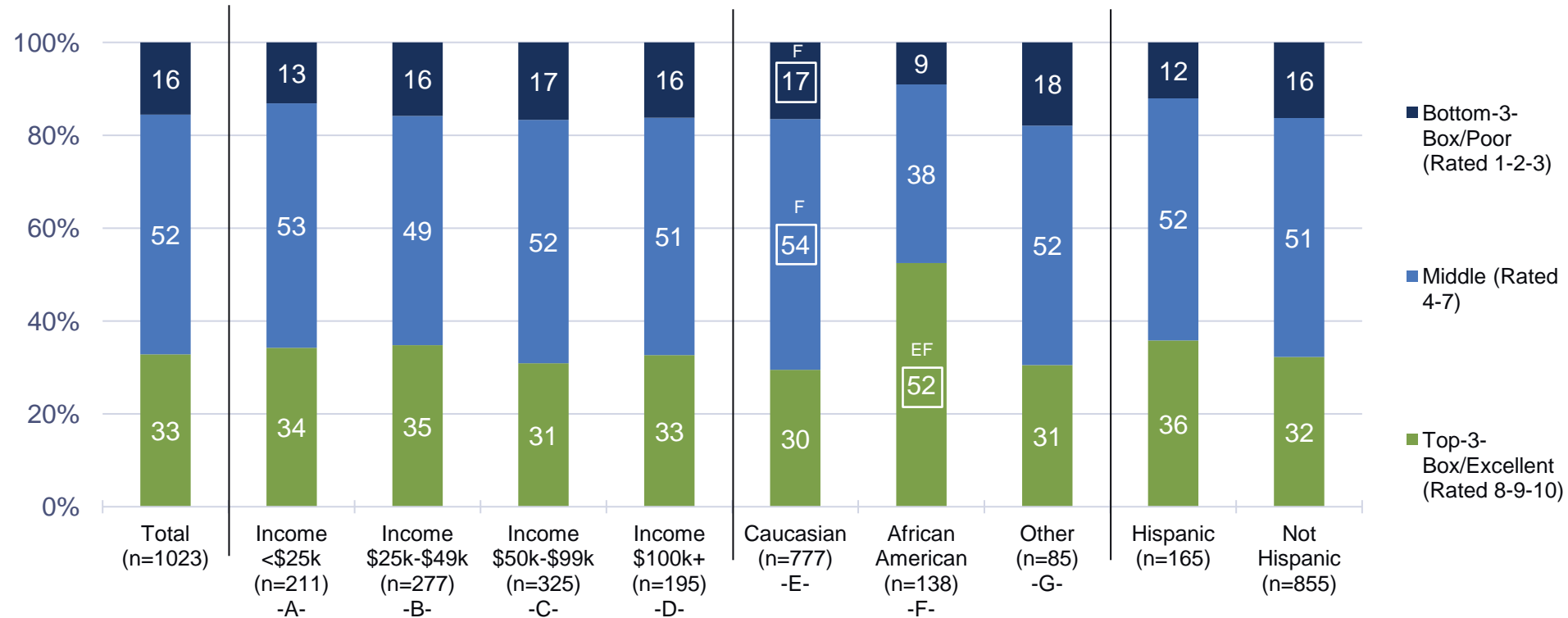
Base: Total Respondents. B21b. How concerned are you that costs are being shifted onto your bill to invest in and maintain infrastructure to support renewable energy and electric vehicles? (Rated Extremely Concerned to Not Concerned at All)

# What should be utility's top priority?



Base: Total Respondents. B4f. The utility has a lot of competing priorities in order to serve customers. From your perspective as a customer, what do you believe should be the utility's top priority to best serve you and your family?

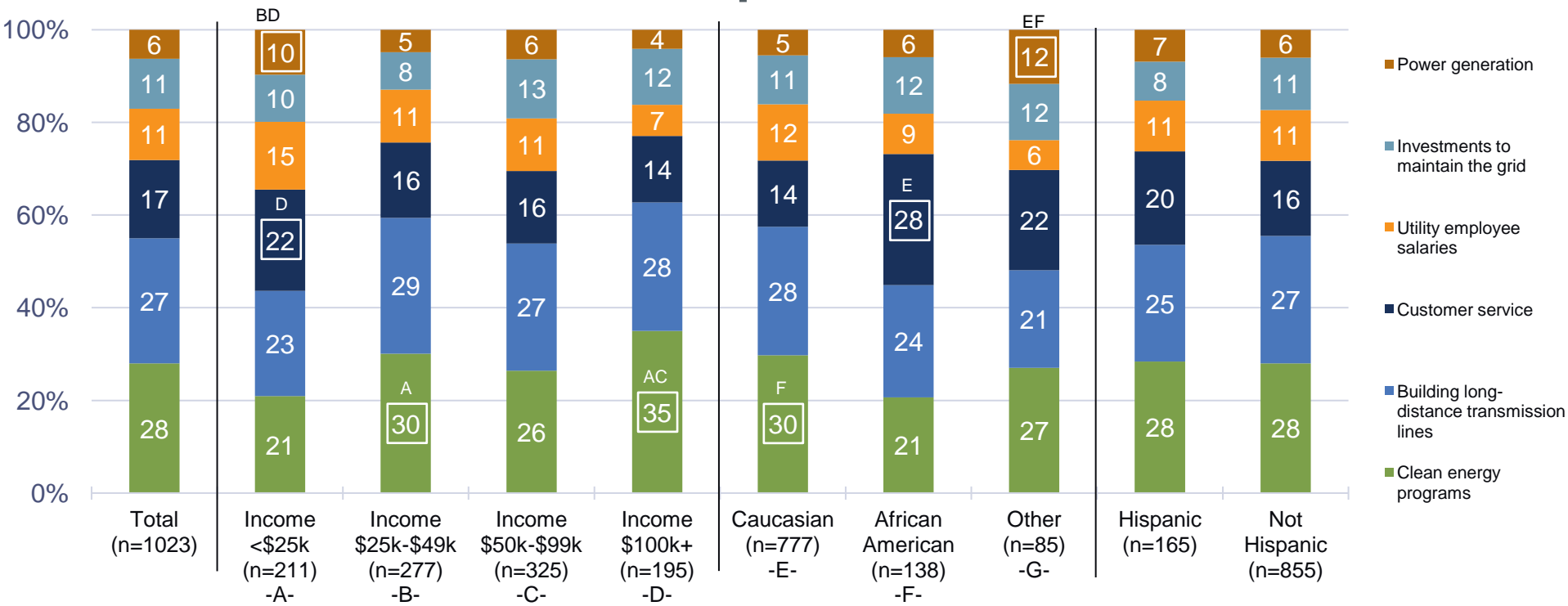
# Rating of utility management's operations related to keeping costs down



Base: Total Respondents. B4i. How would you rate your utility's performance managing their costs to keep your utility bills lower? (Rated Excellent to Poor)

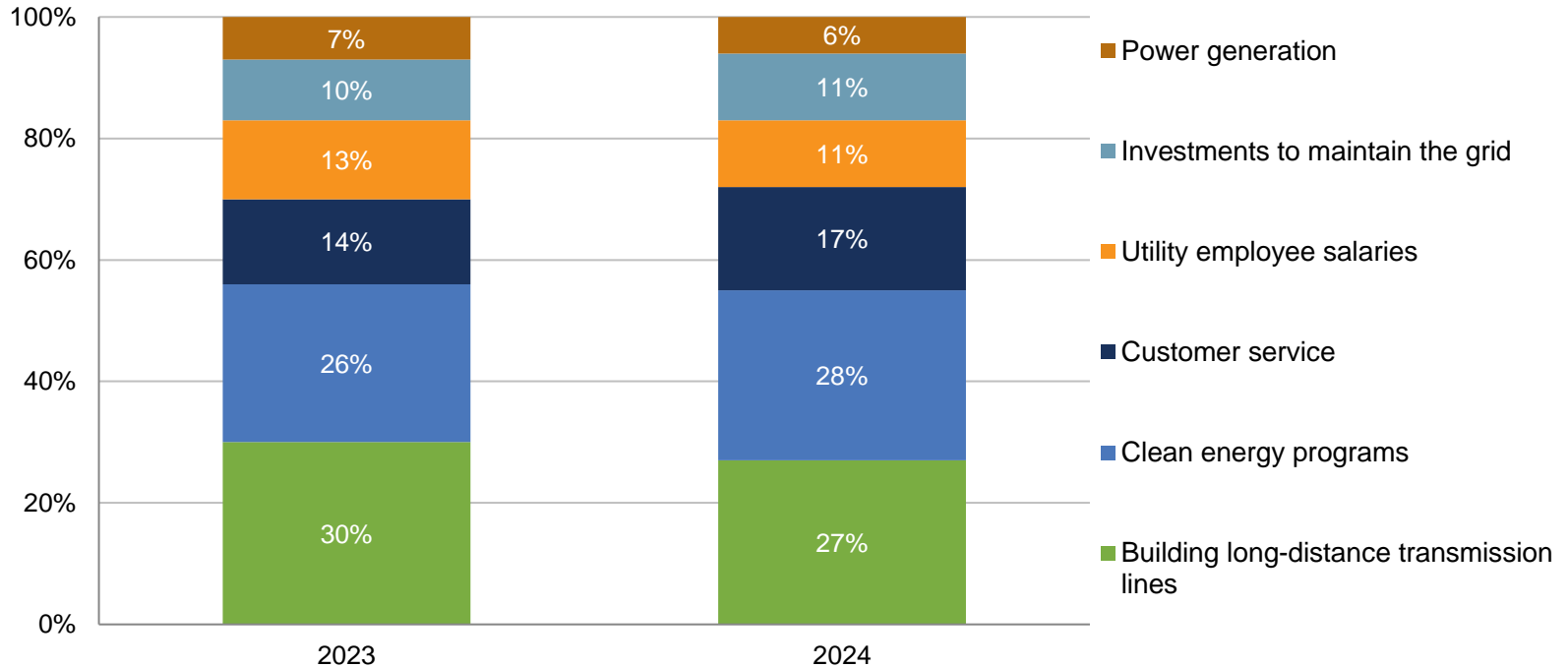


# Recommended cuts by utility to keep customer prices down



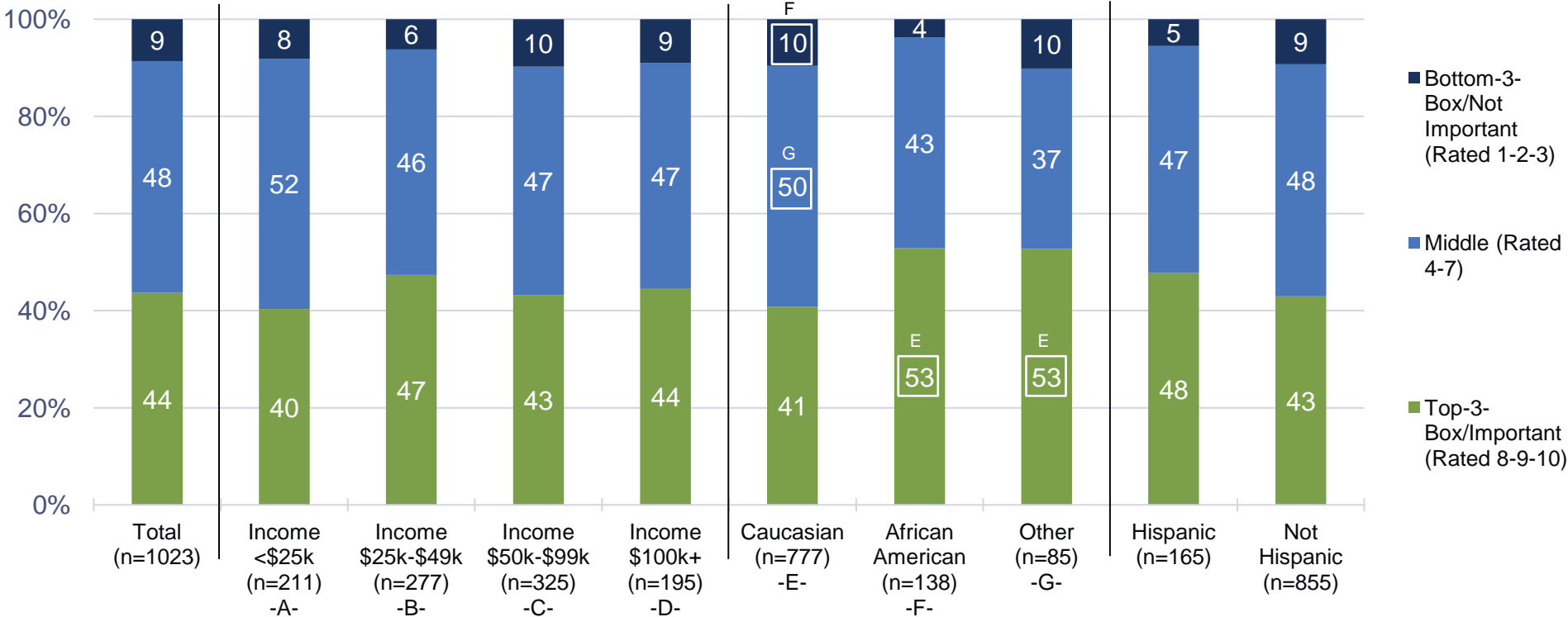
Base: Total Respondents. B16g. If a utility was forced to cut costs in order to keep prices down for customers, what do you recommend should be cut first?

# Recommended cuts (2023–2024)



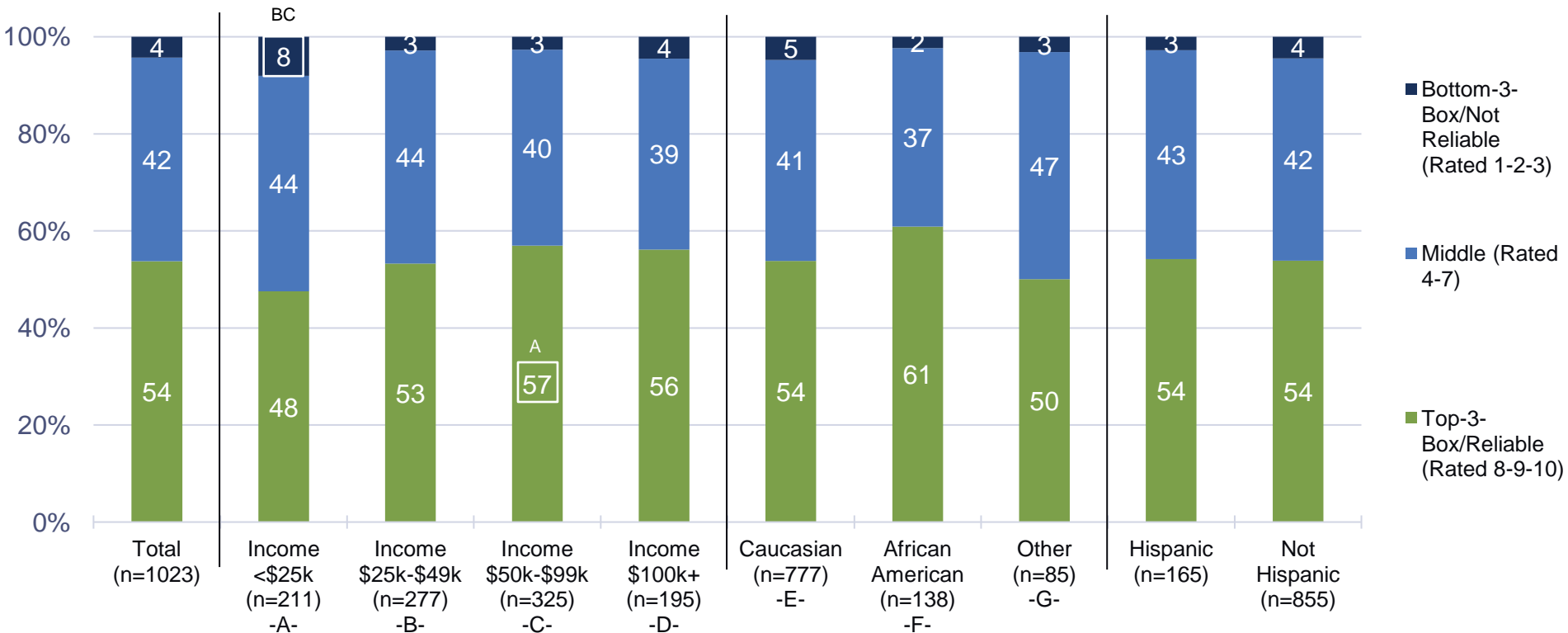
© E Source. **Question:** If a utility was forced to cut costs in order to keep prices down for customers, what do you recommend should be cut first?

# Importance that utility reduces emissions and supports environmentally friendly practices



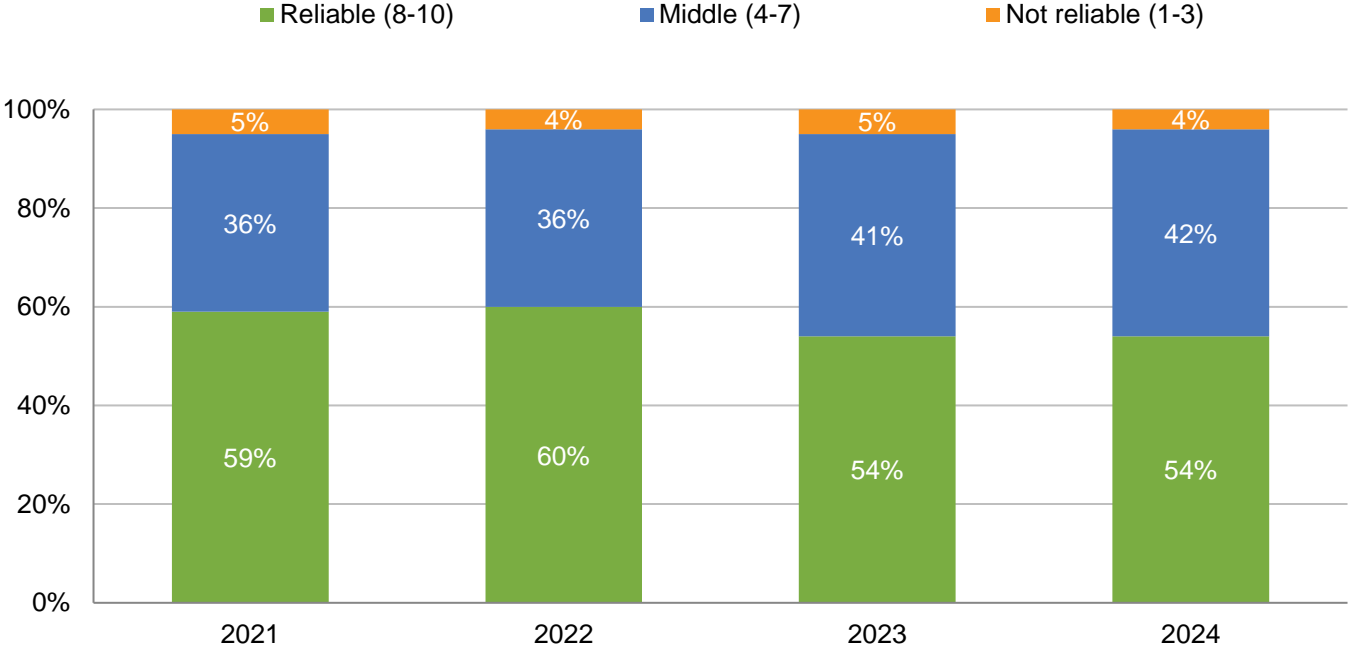
Base: Total Respondents. B18. How important is it to you that your local electric utility reduce emissions and support environment-friendly practices? (Rated Extremely Important to Not at All Important).

# Reliability rating of current utility's service



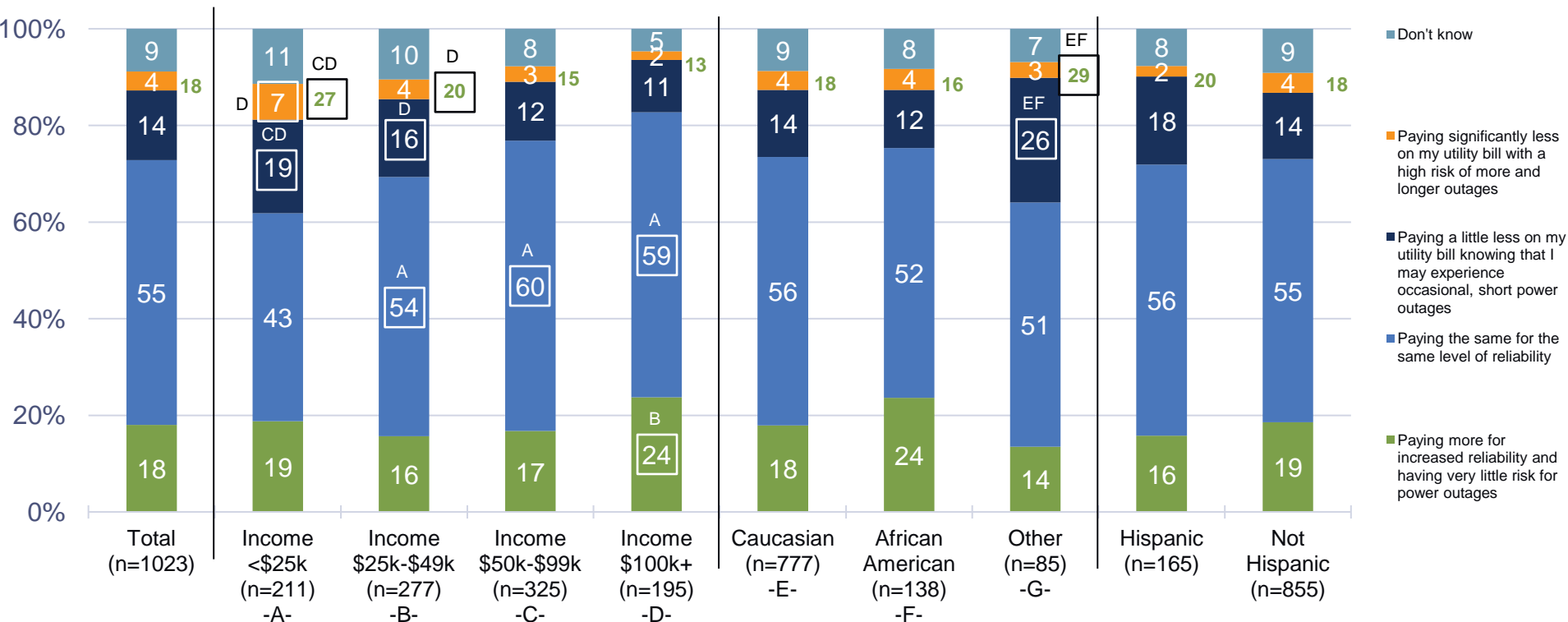
Base: Total Respondents. B9. How would you rate the current level of your utility's reliability to keep the lights on and with minimal to no disruptions of service to you? (Rated Extremely Reliable to Not Reliable at All)

# Reliability rating of utility service (2021–2024)



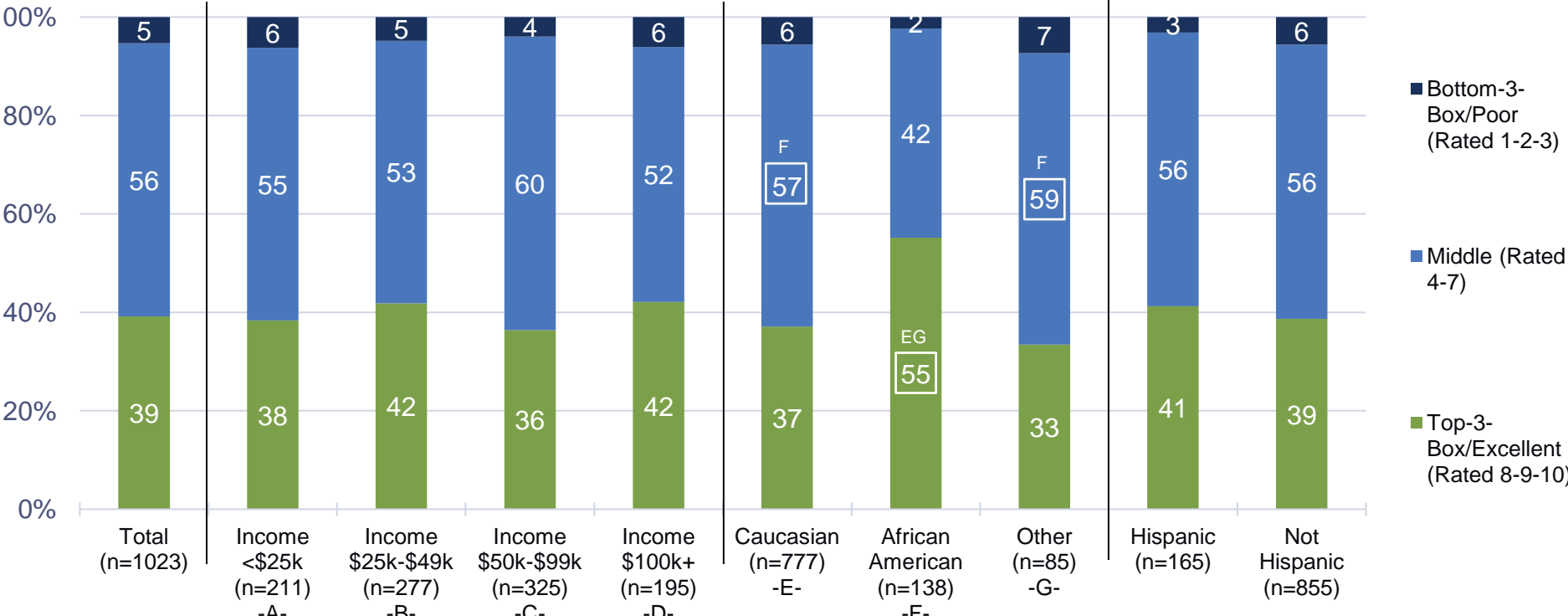
© E Source. **Question:** How would you rate the current level of your utility’s reliability to keep the lights on and with minimal to no disruptions of service to you?

# Most important: Reliability or spending?



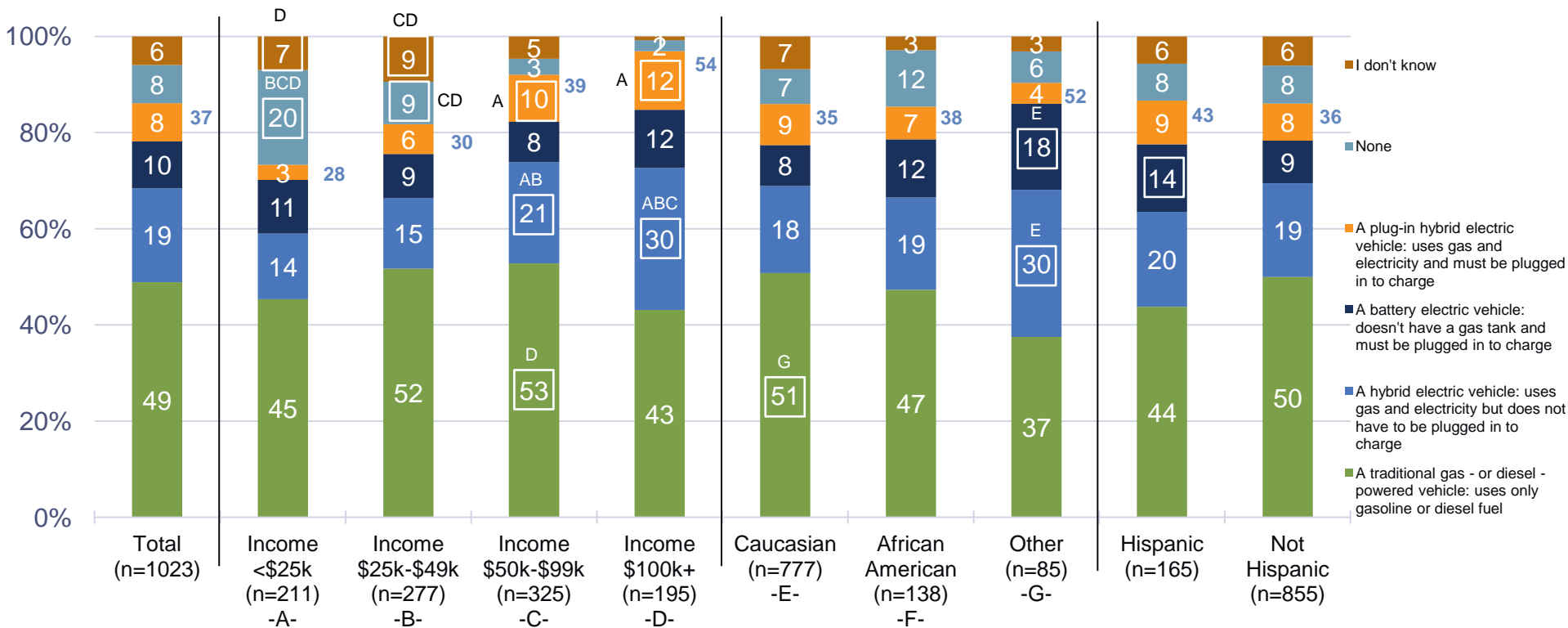
Base: Total Respondents. B16d. Keeping the lights on all the time requires a lot of investment, maintenance, and constant monitoring of the system by your utility and others. In short, what you pay for is not only energy, e.g., electricity, but all the expenses to maintain reliability and keep the lights on. As a customer paying the utility bill, what is most important to you?

# Overall rating of utility's planning and decisions for future



Base: Total Respondents. B16f. How would you rate your utility's strategic planning and investment decisions for the future in regard to generation, the grid and other capital investments made on the behalf of customers? (Rated Excellent to Poor)

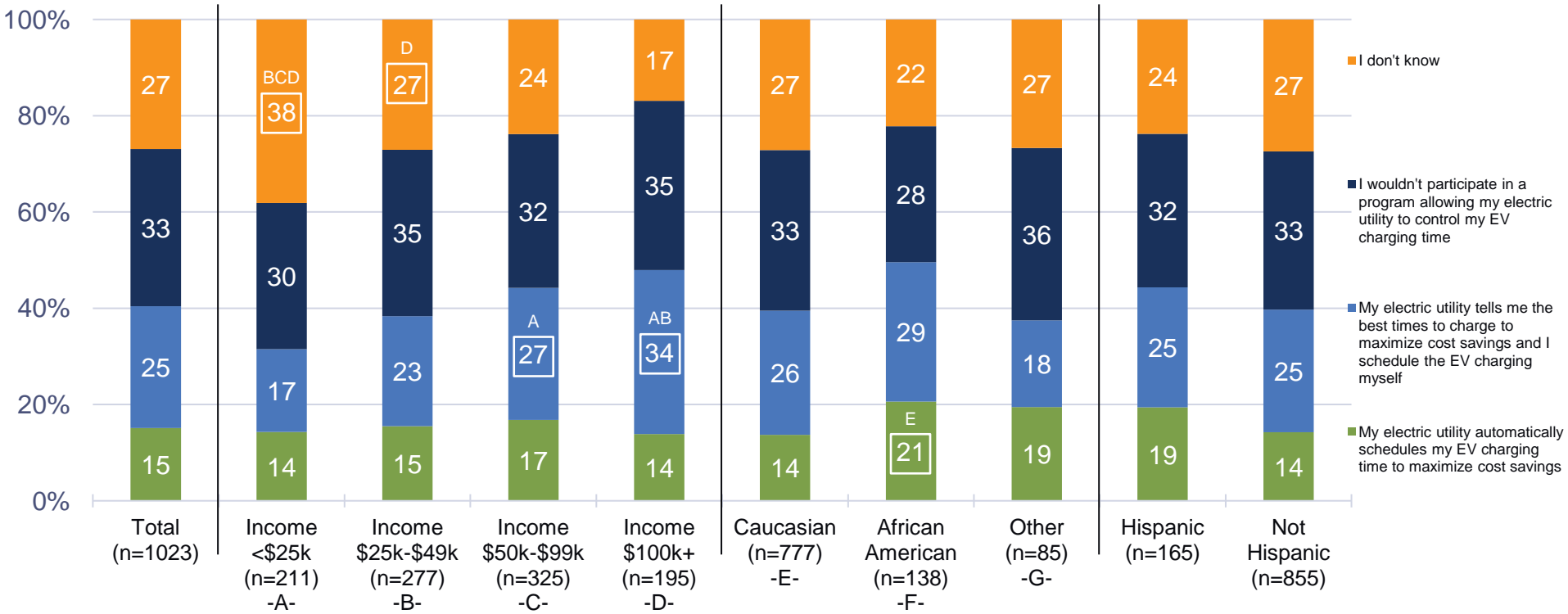
# Vehicle most likely to buy/lease next



Base: Total Respondents. B33. What type of vehicle are you most likely to buy or lease next? Please choose one.

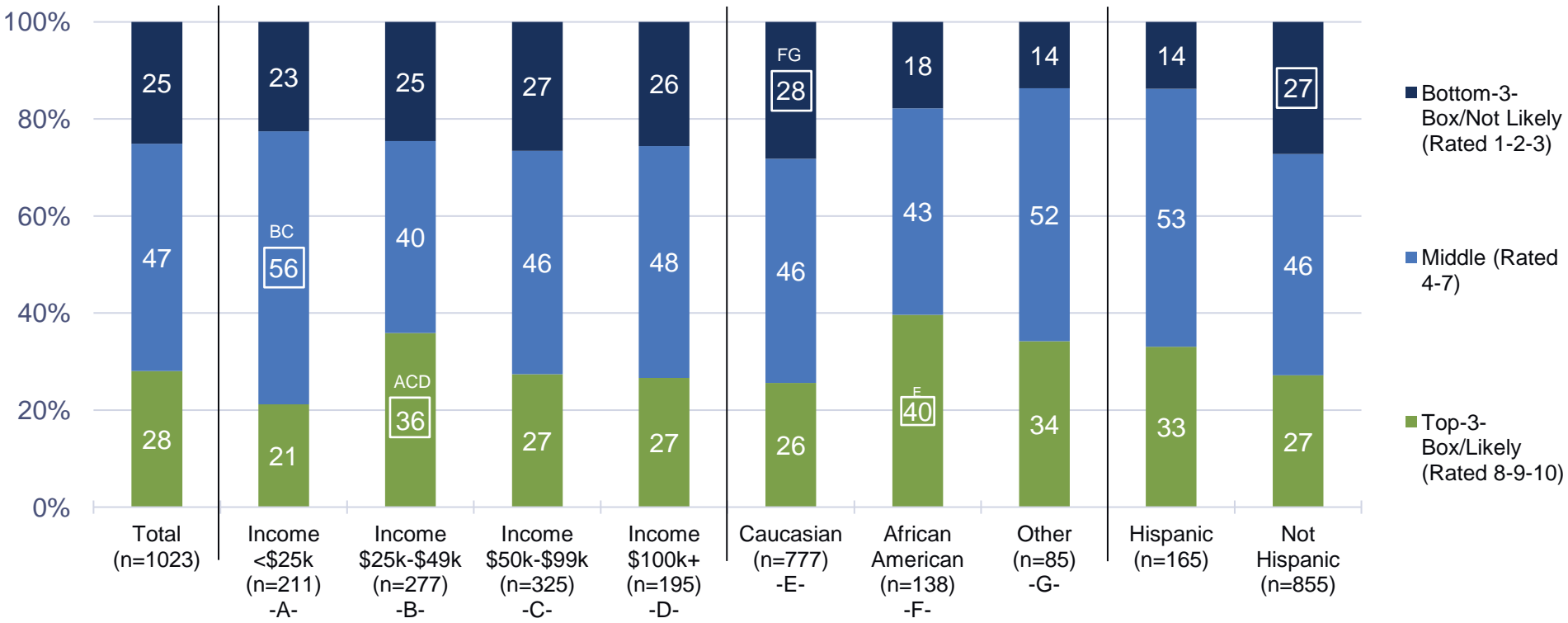


# Participation in EV program to control charging of EV vehicles



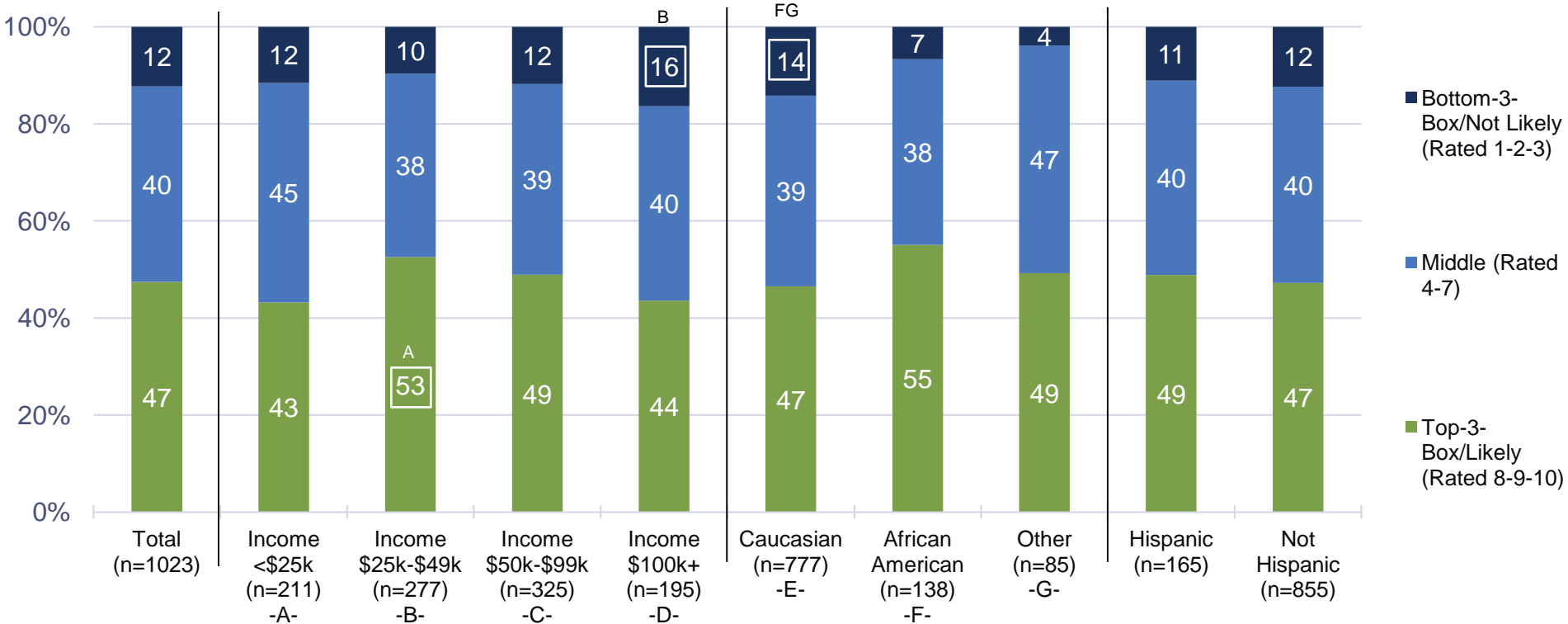
Base: Total Respondents. B36. If your electric utility offered a program that allowed them to control the charging of your electric vehicle, which of the following would make you more willing to participate in this type of program?

# Likelihood of choosing a different electric utility provider



Base: Total Respondents. B25. If you had the ability to choose a different provider than your electric utility, how likely would you be to choose a different provider? (Rated Extremely Likely to Not at all Likely)

# Likelihood of choosing to go off-grid



Base: Total Respondents. B29. Putting aside cost, let's say you could get off the grid entirely and generate all the power you need at your home without the utility or other provider. How likely would you be to choose to go off grid? (Rated Extremely Likely to Not at all Likely)

# Summary of 2024 findings

# Summary of 2024 Findings

- ✓ Utility customer service continues to be rated highly by most; however, there is a growing generational divide, with 62 percent of older customers rating the utility customer service favorably vs. 48 percent of younger customers.
- ✓ Ease of interacting with the utility has declined sharply, moving from 78 percent rating “very easy” or “somewhat easy” in 2021 to 60 percent in 2024.
- ✓ Most customers surveyed view their utility as a trusted energy advisor, and 45 percent strongly believe that the utility “cares about them.”
- ✓ About half of the respondents gave a high rating to their utility’s ability to serve them online. And about the same percentage strongly felt that their utility could protect them from cyber threats.

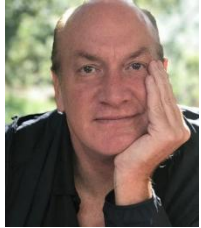
# Summary of 2024 findings (cont.)

- ✓ Like with affordability, there is a mixed view of the utility's ability to keep costs down, with only a third of the respondents giving their utility a favorable rating, respondents recommended cutting clean energy and transmission investments, and 55% believe that affordability should be the utility's top priority.
- ✓ Customer reliability ratings are on a downward trend. Most respondents do not want to pay more for increased reliability, preferring to pay the same for their current level of reliability.
- ✓ 44 percent of respondents strongly believe that the utility should reduce emissions and support environmentally-friendly policies. However, as noted above, most respondents also want cuts in clean energy and transmission investments that link clean energy to the grid.

# Summary of 2024 findings (cont.)

- ✓ Affordability remains a major issue for customers. One-third of respondents were concerned about their ability to stay current over the next six months. Perceptions of cost-shifting could compound those concerns. Respondents were very concerned over cost-shifting for clean energy, higher bills due to non-paying customers, and data centers.
- ✓ Good news on electrification. 37 percent of respondents anticipated that they would purchase some type of electric vehicle in the future, and 39 percent would participate in a utility EV program.
- ✓ Customer satisfaction is not customer loyalty. 28 percent of respondents would choose an alternative provider than their utility if they could. 47 percent of respondents would go completely off-grid if they could.

# Contact



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