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WHAT MATTERS MOST TO UTILITY CUSTOMERS?

What 1,300 customers say about cost, service and trust



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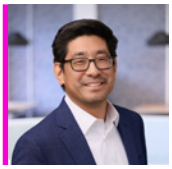
PERCEPTION IS NOT A SOFT METRIC. IT'S THE CUSTOMER'S REALITY.

Customers judge utilities through a small number of recurring and high-consequence experiences. The bill, the payment journey, the outage, the restoration, the service interaction, and the digital channel all shape whether the utility feels easy to deal with, fair, responsive, and trustworthy.

This research will help utility leaders decide where to act first. Its value comes from connecting perception to operational performance, then using that connection to reduce customer effort, improve resolution, lower cost to serve, and build trust.

The results provide a common external reference point. The variation across utilities is equally important: It shows where customer experience is a meaningful differentiator and where leaders can look for practical improvement opportunities.



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Customer satisfaction is rarely driven by a single interaction. Instead, it is shaped by a combination of experiences—from reliability and outage restoration to customer service, digital tools, billing, and brand perceptions. Looking at these elements together provides a richer understanding of where utilities excel and where improvements will have the greatest impact.

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EXECUTIVE SUMMARY

Customers judge utilities through everyday moments and high consequence events.

West Monroe surveyed 1,300 people across the United States in order to gain actionable insight into the underlying drivers of utility customer experience. The survey results yielded color about the moments that impact how a customer feels about their utility—these moments include receiving and paying a bill, asking for help, navigating a digital channel, losing power, and waiting for service to return.

The survey points to four priority areas in which utilities should consider action. The practical question is where to act first. We suggest that utilities use these findings as guidance to further identify challenges in meeting the moments that matter the most for their customers, as well as focusing investment on the changes most likely to improve customer outcomes.

PRIORITY	WHAT CUSTOMERS TOLD US	WHY IT MATTERS
Affordability frames adoption and trust	**47% worry about paying their utility bill each month**. ***74%*** identify as very environmentally conscious, but only ***42%*** are willing to pay more for clean energy.	Customers may support the destination while questioning the cost. Clean-energy and affordability programs need a clear value story, practical choices, and visible household impact.
Resolution matters more than contact volume	**18% contacted customer service multiple times in the past year.** Overall satisfaction falls from **34%** after one contact to **20%** after two and **18%** after three or more.	Recurring contacts are a signal of unresolved need and avoidable cost. The opportunity is to fix upstream defects and improve first-contact resolution.
Restoration is a distinct customer journey	**63% experienced at least one outage.** Overall satisfaction reaches ***63%*** when customers rate outage restoration as outstanding, compared with ***10%*** for a neutral restoration experience.	Reliability is foundational, but the response after an interruption shapes whether customers feel the utility is capable and responsive.
Digital and human service are connected	**73% visited a utility website or app in the past year.** Website and mobile-app ease of use both average ***53%***, with wide variation across utilities.	Digital friction does not stay digital. It often becomes a call, a repeat contact, or a broader judgment about how easy the utility is to deal with.

These findings are most useful when put into action: Identify the moments that matter, benchmark cost and quality, bring Voice of the Customer into problem definition, assign cross-functional ownership, and measure whether changes improve customer outcomes and cost to serve.

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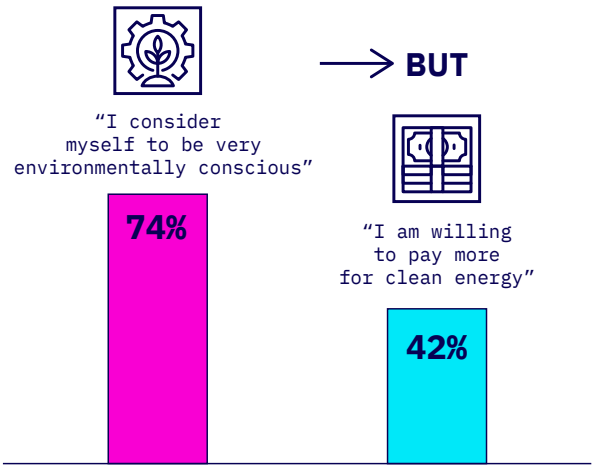
AFFORDABLE & CLEAN ENERGY

Customers support a cleaner future—but not at any price.

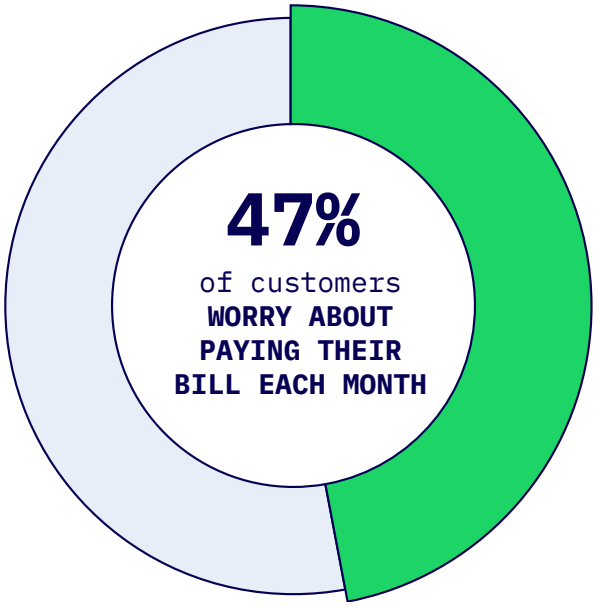
74% consider themselves very environmentally conscious. Just 42% say they are willing to pay more for clean energy.

The gap between what customers believe and what they are prepared to fund is the central challenge for clean-energy adoption.



Agreement Statements on Energy Costs & Supply

Environmental concern is high, but financial pressure is equally real. 47% of customers worry about paying their utility bill each month (as high as 58% in some utilities), creating a difficult tension: Customers may support the destination while resisting the cost of getting there.



Environmental concern alone will not guarantee participation in clean-energy programs. Adoption will depend on making the case both rationally and emotionally.

- **Rational benefits:** value, affordability, control and practical household impact
- **Emotional benefits:** stewardship, community responsibility and a cleaner future

The right balance will differ by market. The need to make clean energy feel both worthwhile and attainable is universal.

Clean-energy adoption needs a value story as well as a values story.

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OUTAGES

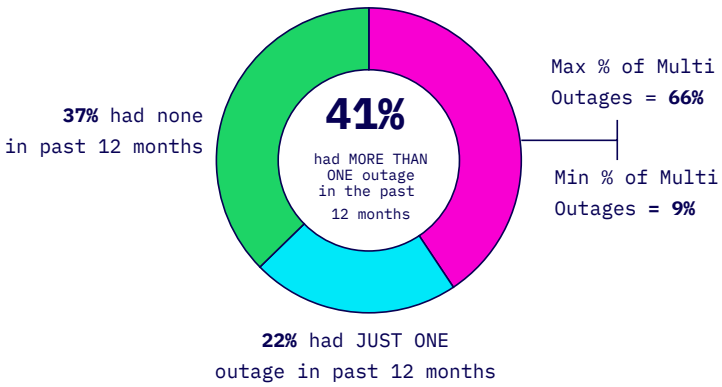
Especially in this age of high reliance on technology, service interruptions are even more costly to customers.

Nearly two-thirds of households experienced at least one outage in the past 12 months. Four in ten experienced more than one.

Because outages are lived directly by customers, they can quickly turn a technical performance issue into a judgment about whether the utility is reliable, responsive, capable, and caring.

The share of customers experiencing multiple outages varies widely by utility, from 9% to 66%. This range suggests that the outage experience can be a meaningful differentiator in how customers perceive their utility.

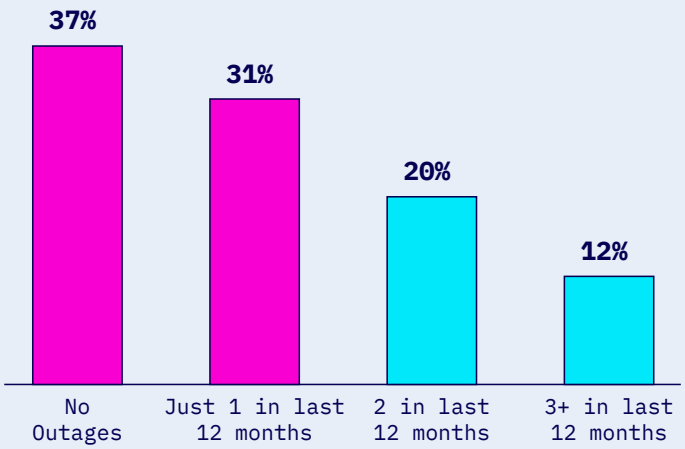
63% have experienced AT LEAST ONE OUTAGE in the past 12 months



An outage not only reflects the health of the system. It also reflects the health of the customer relationship.

A single interruption may be forgiven. A pattern becomes a perception.

Overall Satisfaction with the Utility by Outage Frequency



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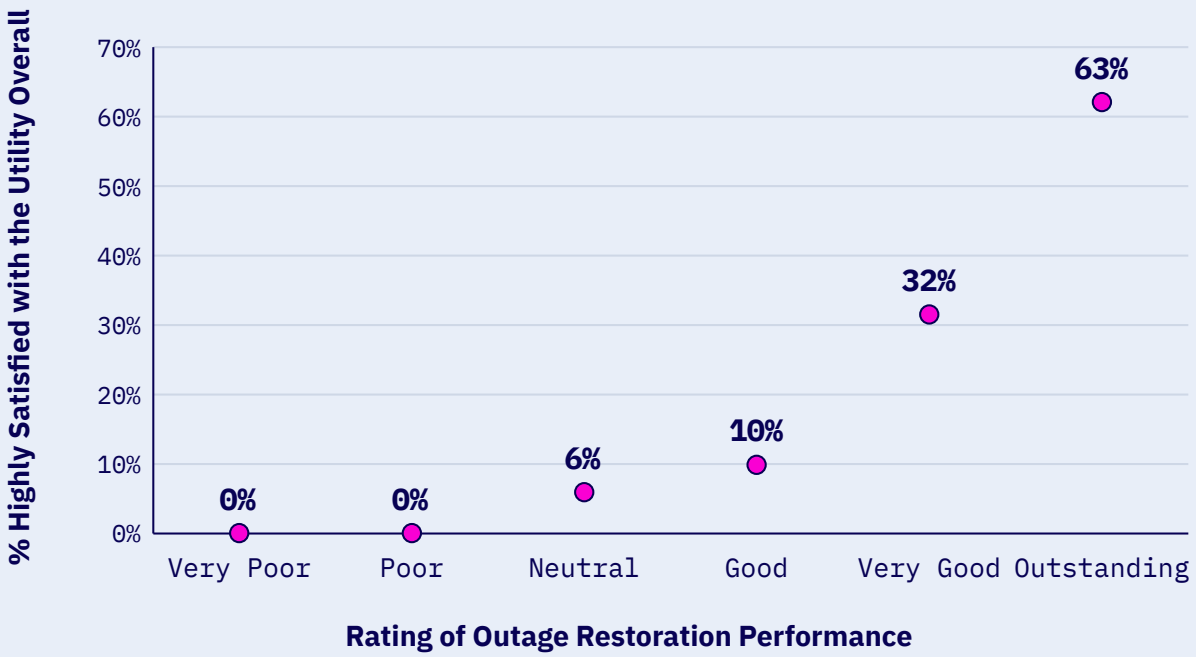
OUTAGE RESTORATION

The outage restoration process is an opportunity to impact the customer relationship, both positively or negatively.

Service restoration includes more than restoring power.

A utility can improve the outage restoration experience even when it cannot reduce the duration or frequency of outages. A poor restoration process leaves little room for customers to feel satisfied with the utility. In contrast, improvements in a customer's outage restoration performance increases the likelihood that a customer will rate the utility very high in terms of satisfaction.





Reliability matters. But once power has been interrupted, restoration becomes the moment when utilities either earn trust back or lose more of it.

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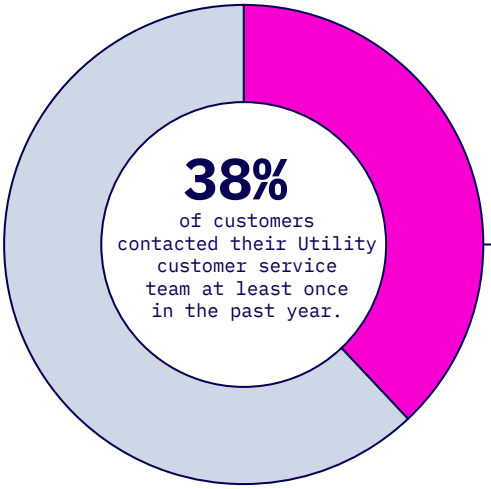
CUSTOMER SERVICE

Customer service acts as the safety net for moments that matter.

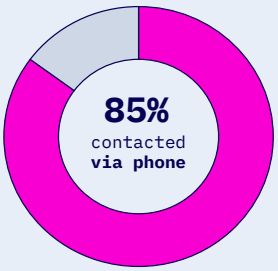


Max 60% of customers contact

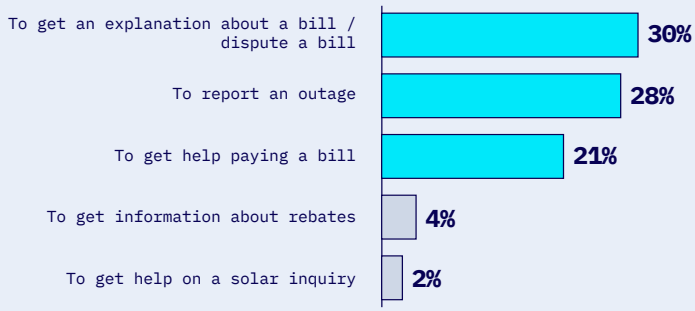
Min 30% of customers contact

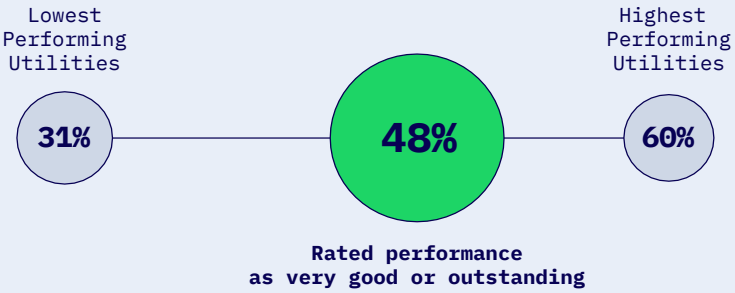


Phone remains the dominant channel for the moments customers care about most: understanding or disputing a bill, reporting an outage, and getting help paying a bill.



Contacted customer service about...





Among customers who contacted customer service, 48% rated the performance as very good or outstanding. However, results vary by utility, ranging from 31% to 60%.

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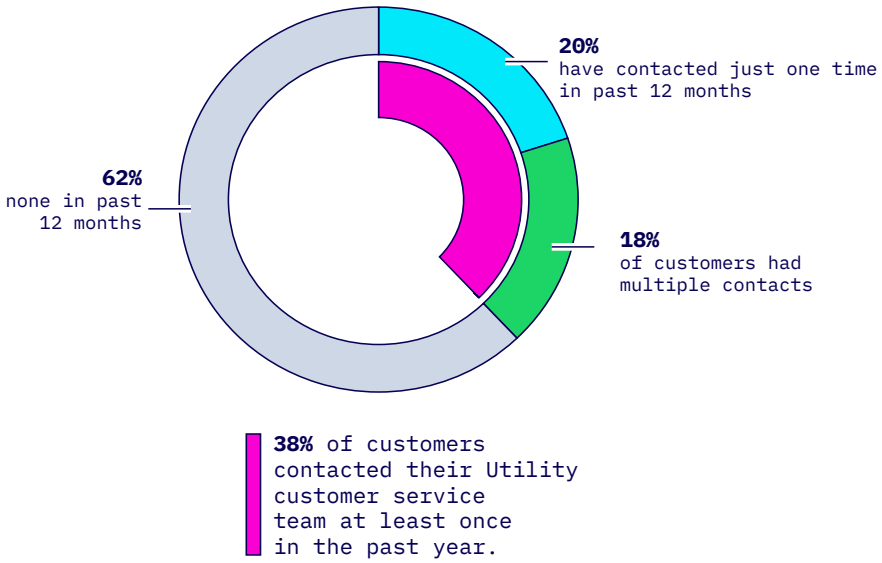
ONE CONTACT CAN HELP. REPEATED CONTACTS CAN HURT.

20% of customers contacted customer service exactly once, while **18%** contacted customer service more than once.

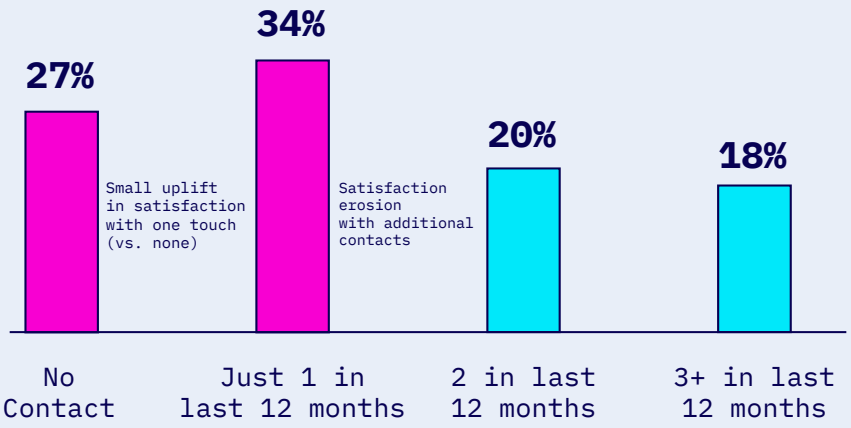
The data suggests that a single interaction can be successful—and may even lift satisfaction.



One additional interaction tells a different story. Repeated contact is often a sign that the customer's need has not been resolved cleanly, eroding satisfaction overall.

The goal as always is not simply to answer the customer. It's to resolve the need.

Overall Satisfaction with the Utility by Customer Service Contacts



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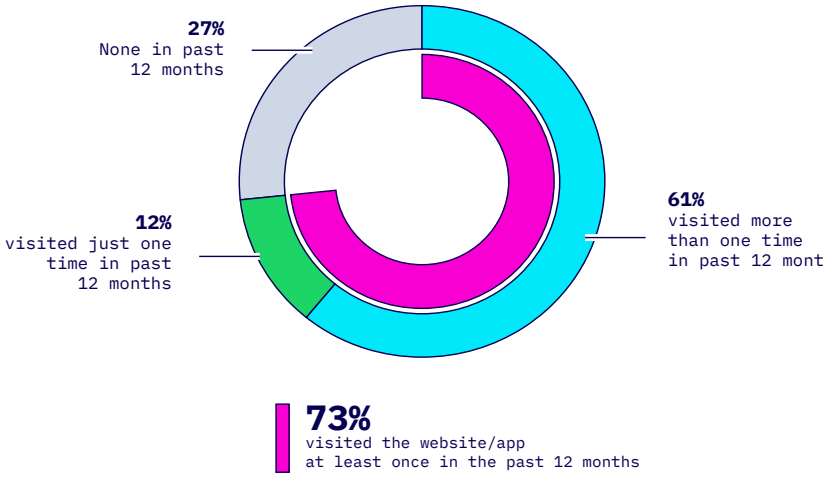
DIGITAL

Digital channels shape the service relationship.

73%

of customers visited a utility website or app at least once in the past year

Although many customers continue to contact their utility by phone, they also tend to interact with their utility digitally. Digital channels are now part of how customers pay, seek information, manage services, and decide whether their utility is easy to deal with.



Every digital interaction either reduces effort or creates more of it.

Yet the experience varies.

Website ease of use is rated very good or outstanding by **53%** of customers, with utility results ranging from **36%** to **66%**.

Mobile-app ease of use also averages **53%**, with results ranging from **28%** to **70%**.

A digital channel that creates friction becomes a core customer service problem, and ultimately a brand and reputation problem.

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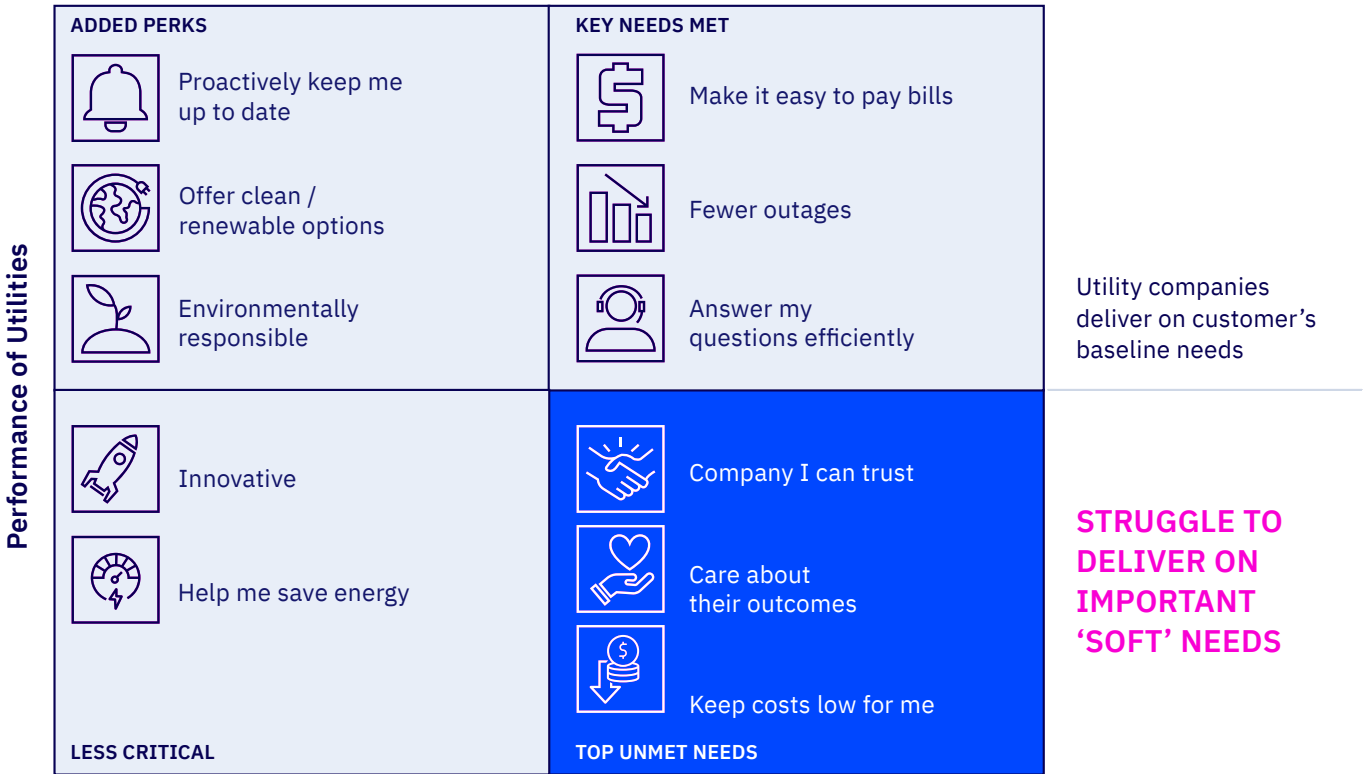
IMPORTANCE AND PERFORMANCE

Utilities deliver the transaction. Customers still want the relationship.

Functional needs are generally being met. Trust and care remain harder to deliver.

Importance to Customer vs. Perceived Performance



When we compare what customers say with how well they believe their utility performs, a clear pattern emerges. Utilities perform relatively well on baseline needs such as paying bills, maintaining supply and answering questions. However, utilities struggle more to deliver on affordability and softer emotional outcomes of trust and care.

These are not "soft" in the sense of being optional. Trust and care shape how customers interpret every hard metric.

They influence whether a bill feels fair, whether an outage feels managed, whether a service interaction feels respectful and whether a clean-energy proposal feels credible.

A critical measure of performance is how customers feel.

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BEYOND THE METRICS

Additional affordability resources

Affordability is a persistent concern for utility customers. These resources offer a broader framework and practical actions for addressing it.

MEETING THE MOMENT ON CUSTOMER AFFORDABILITY: A PRACTICAL GUIDE FOR UTILITIES

A guide to embedding affordability across utility strategy, operations, investments and customer experience.

CUSTOMER AFFORDABILITY IN ACTION: WHAT UTILITIES CAN DO NOW AND WHAT COMES NEXT

Ten actions utilities can take to improve affordability in the near term and over time.

To learn more about this research or discuss how your utility compares to the benchmark, please contact:



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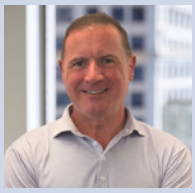

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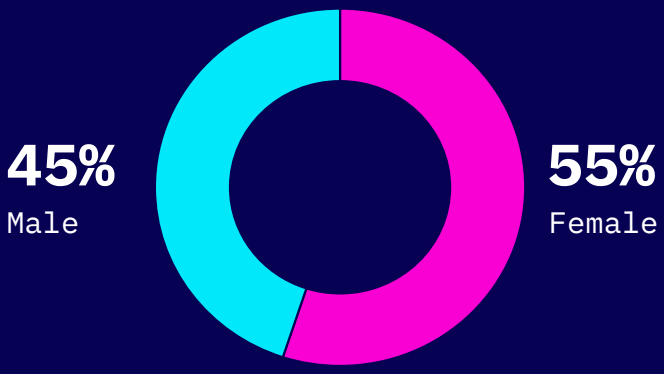
METHODOLOGY

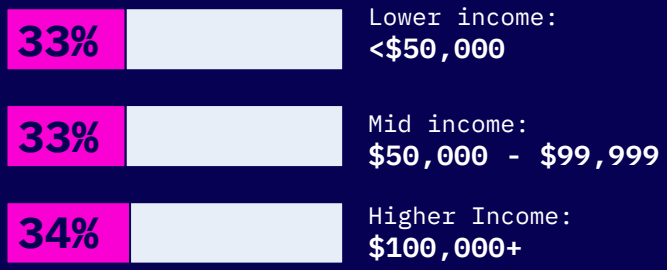
10-minute online survey among 1,300 residential utility customers, conducted in April 2026.

The study benchmarks customer perceptions of affordability, clean energy, outages, restoration, customer service, digital experience and trust.

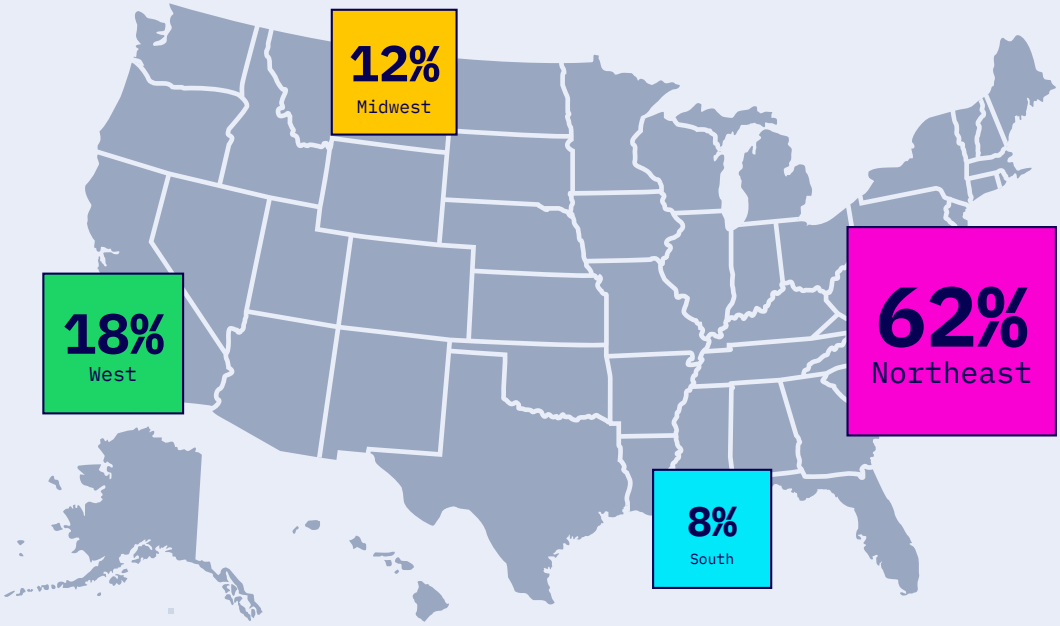
GENDER



What is your total annual household income (before taxes)?



REGION



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