

LMI Customer Pulse Survey: Fraud, stigma, access, and race in energy assistance programs

Summary and findings | June 2026



E Source

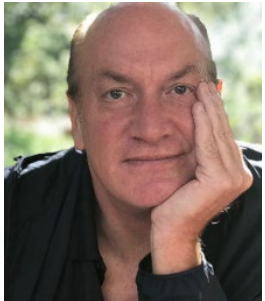


Ben Nathan

Director,

Affordability and Equity

E Source



Jamie Wimberly

Senior Vice President,

Utility Customer Strategy

E Source

The big picture

- Utility bills are a major and growing source of financial strain for low- and moderate-income (LMI) households—driving stress, forcing trade-offs and sacrifices, and creating arrears and disconnection risk. While more households are turning to energy assistance offerings to help keep the lights on, program uptake is lagging in many service territories.
- Assistance program success is just as much about process as it is program design: customers face many “administrative” hurdles to obtain assistance, including lacking awareness, unclear eligibility, and burdensome application requirements. But there’s more going on than just administrative and process challenges. There are more “hidden” barriers to program uptake: customers’ perceptions of fraud, access, stigma, and race when it comes to utilities and assistance.
- There’s an emotional wrapper around these processes for customers, which is also experienced by the utility customer service representatives and local agencies who help them. Fraud concerns are driving the fearful narrative: there’s a broader perception by society that being poor means you’re trying to deceive or steal, which creates more barriers for assistance programs.
- As part of the E Source 2026 Q2 LMI Pulse Survey, we asked LMI customers about their perceptions of the role fraud, access, stigma, and race play in the uptake of energy assistance offerings.

Inexperienced LMI assistance journey

Brenda has never applied for assistance before; her shutoff triggers her trying to navigate a complex set of assistance programs.

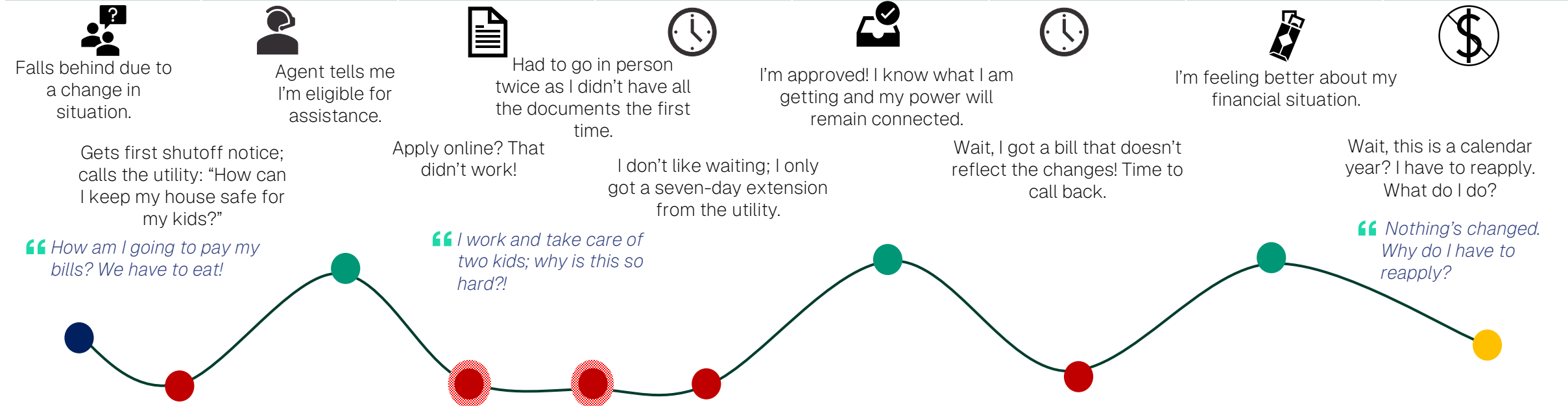
- Brenda
- Age: 36
- Busy, considerate, practical, straightforward



My biggest frustration was that I just didn't know what my next step was going to be.

Inexperienced LMI assistance journey

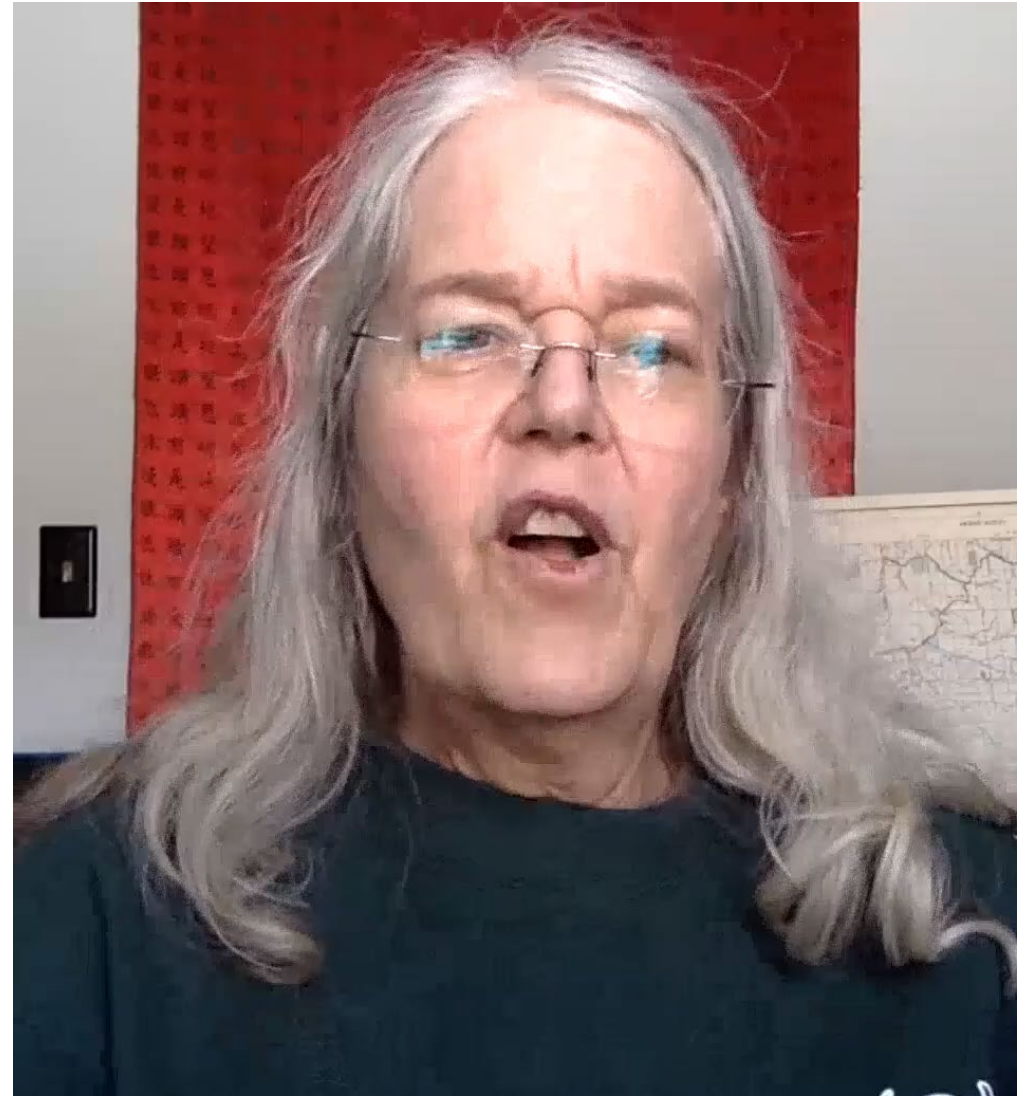
Finding help		Going through the process		Gaining access		Program is active	
Need	Becoming aware	Application	Waiting for approval	Approval	Waiting for benefits to start	Receiving benefits	Current year's benefits end



CX insights	Feeling anxious and stressed	Feeling anxious and frustrated	Feeling relief and confusion	Feeling grateful yet concerned
	Inexperienced customers are often triggered by sudden changes (medical, repair, job change, etc.).	Verification for assistance takes time and potentially money as customers have to take time away from work to provide all their information.	Receiving the approval notice sometimes conflicts with billing dates; when a customer doesn't know their status, they call back to the utility!	Depending on when the customer applies for assistance, they may need to reapply immediately; Brenda didn't know what she was supposed to do.

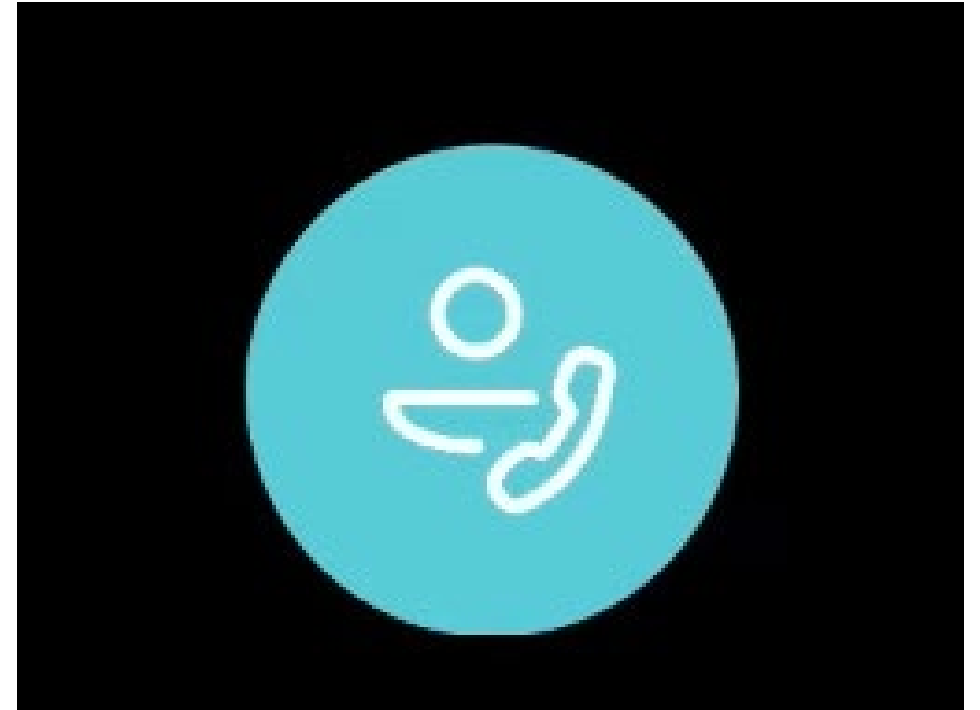
Didn't think I qualified ...

“I've always known ... I was too proud to apply and I didn't think I qualified ... I'm on disability and I have teachers retirement ... puts me over a lot of things just by like \$100 ... I make too much money to qualify for so many things ... so I just didn't apply ... my cousin Carol said just go down there and apply, you never know ... she said show them all your health care bills ... I think that's what helped offset that \$100 more that I make to show that I'm spending thousands of dollars out of pocket on healthcare.”



What I'll remember most ...

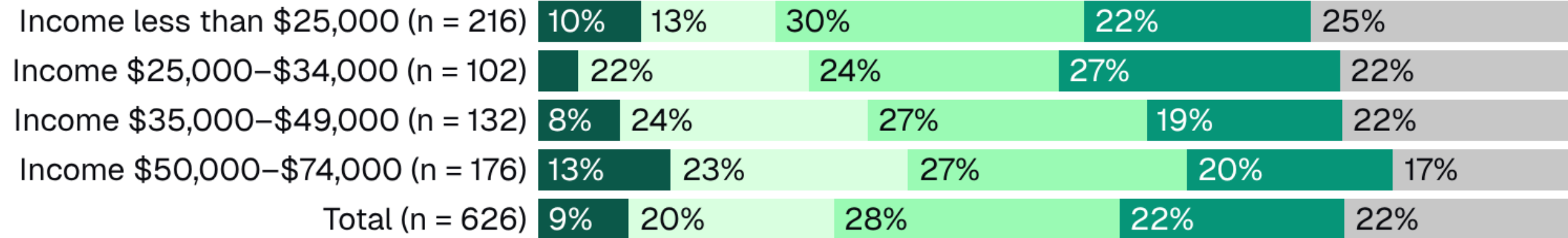
“The lady didn't make me feel like I was some stupid poor person ... she made me feel like I was just as good as her and everybody else ... that's a big thing for people on low-income ... people always look down on you ... I'll remember her voice until the day I pass away ... she made me feel important.”



Self-consciousness of asking for utility bill assistance

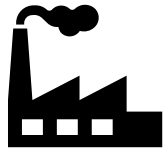
As income increases, so does self-consciousness in asking the utility for help.

Extremely self-conscious
 Very self-conscious
 Somewhat self-conscious
 A little self-conscious
 Not at all self-conscious

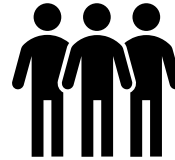


© E Source (2026 Q1 LMI Customer Pulse Survey). **Base:** Customers with household incomes of less than \$75,000 who pay utility bills (n = 626). **Question L12:** If you needed to apply for a program that provides financial assistance with utility bills, how self-conscious would you feel asking your utility for help? **Note:** Percentages may not add to 100 due to rounding.

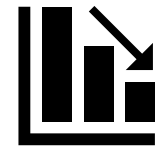
Utilities addressing issues like equity, social justice, and poverty



Fifteen percent of LMI customers surveyed in 2023 rated their local utility **negatively**, in terms of their past decisions and investments' impacts on their communities.



Forty-four percent thought it was their utility's responsibility to do their part in addressing larger issues like equity, social justice, and poverty.



Twenty-three percent reported low satisfaction with their utility's efforts to address these issues.

© E Source (2023 LMI Customer Pulse Survey). **Base:** 604 low- and moderate-income utility customers nationwide (<\$50,000 household income).

Detailed Findings



Research methodology

■ Online survey with 613 adults age 18+ who have an annual household income of <\$75k from May 1–5, 2026.

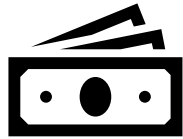
■ Results were weighted to match actual proportions in the population.

■ Bases shown in this report are the unweighted bases.

■ The survey was fielded by Russell Research; sample was provided by an external sample provider.

■ All research was conducted in compliance with all relevant legal and ethical requirements.

Confidence in telling the difference between legitimate and scam energy assistance offers



Twenty-one percent of LMI utility customers surveyed were not at all or not very confident they could tell the difference between legitimate and scam energy assistance offers.



The lowest-earning customers (<\$25,000 annual household income) had the least confidence.

Customers age 35+ were less confident than customers age 18–34.



Black customers were more confident than white customers.

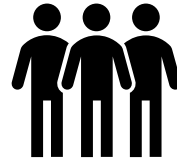
Urban customers were more confident than suburban and rural customers.

© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L1:** How confident are you that you can tell the difference between a legitimate financial energy assistance program and a scam or fraudulent offer? **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Trust utility to provide accurate energy assistance program information



Nineteen percent of LMI utility customers surveyed said they do not trust at all or trust very little their utility to provide accurate energy assistance program information.



Customers age 35–54 reported mistrust at a higher rate compared to other age groups.

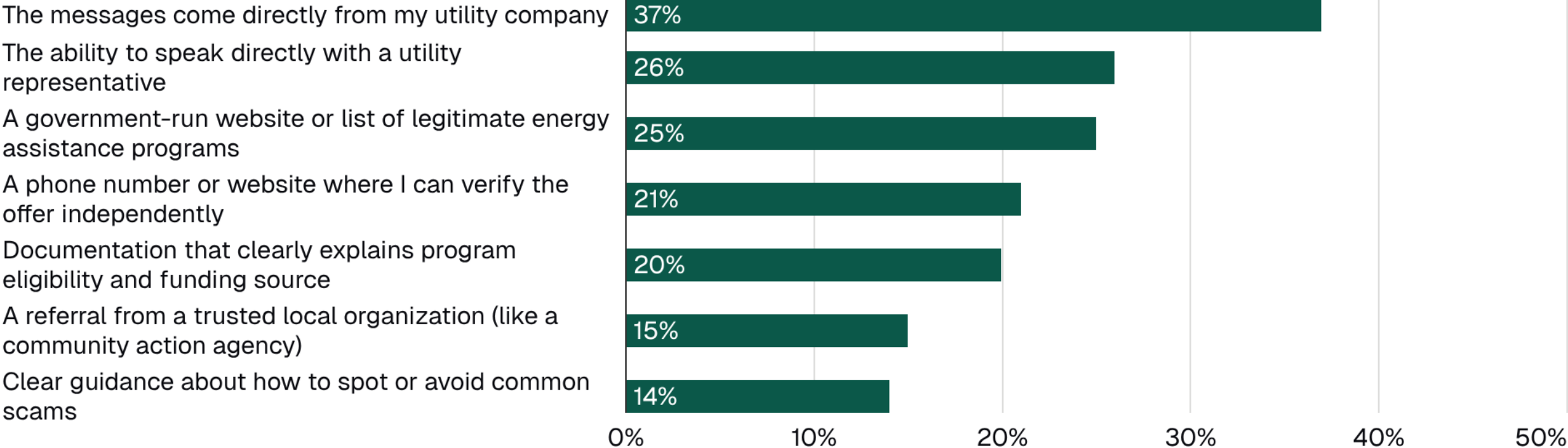


Urban customers reported mistrust at a higher rate than suburban customers.

© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L2:** How much do you trust your electric or gas utility company to provide accurate information about financial energy assistance programs? **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Factors that help LMI customers trust financial energy assistance offers

LMI customers most commonly said they'd trust a financial assistance offer if it came directly from the utility.

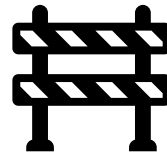


© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L3:** What would most help you trust that an offer for financial energy assistance is legitimate and not a scam? Choose up to two. **Notes:** LMI = low- and moderate-income. Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data. Responses for “None of these” and “Don’t know” are not shown; each were selected by 5% of respondents.

Application & enrollment for energy assistance programs is easy for people like you to apply



Nineteen percent of LMI utility customers surveyed disagreed that the application and enrollment process for energy assistance programs is designed to make it easy for them to apply.



White customers were less likely than Black customers to agree that the application process is designed to make it easy to apply.



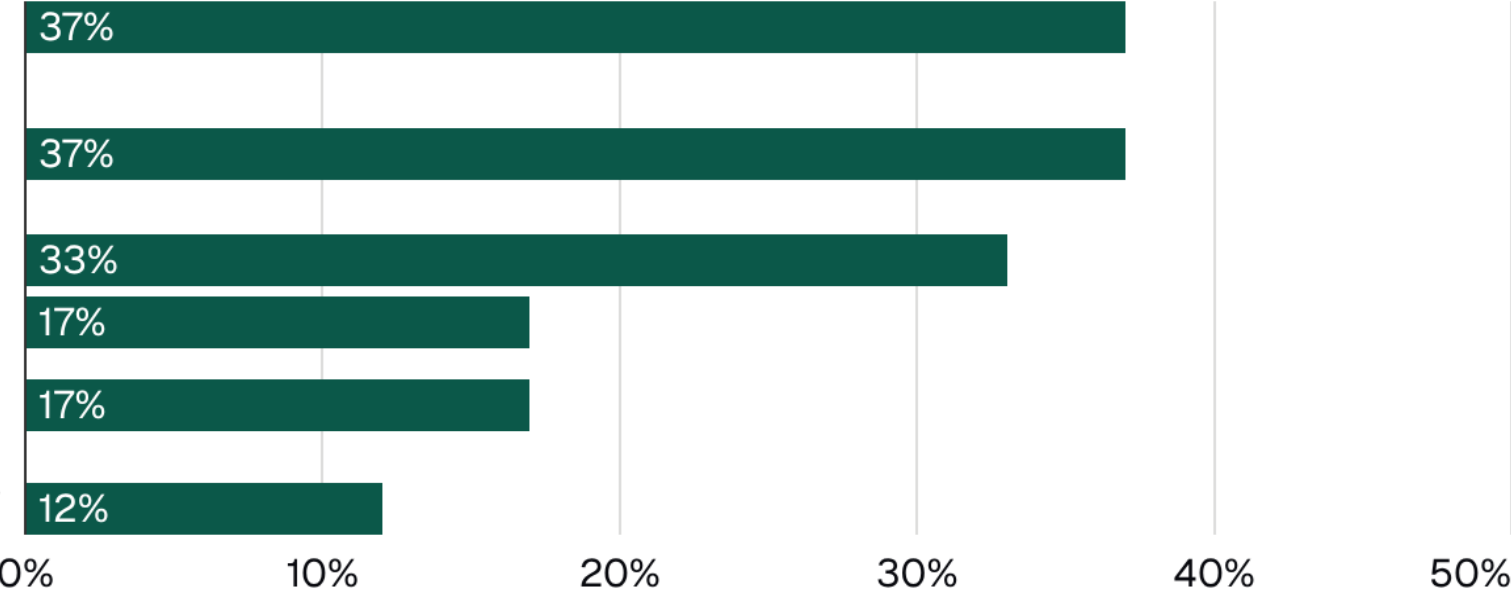
Customers age 55+ were less likely to agree than those age 18–34.
Homeowners were less likely to agree than renters.

© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L4:** To what extent do you agree or disagree that the application and enrollment process for financial energy assistance programs—like documentation requirements and application forms—is designed to make it easy for people like you to apply? **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Ways utilities could improve the financial energy assistance application process

LMI customers most commonly said utilities could improve the application process by providing staff guidance, automatically qualifying eligible customers, and simplifying required documentation.

- Utility staff who can guide customers through the application step by step
- Automatically qualifying customers who already receive or qualify for other non-energy assistance programs
- Shorter applications with fewer required documents
- A private online application
- Allowing customers to self-report income for eligibility
- Using neutral, respectful language in program names and materials

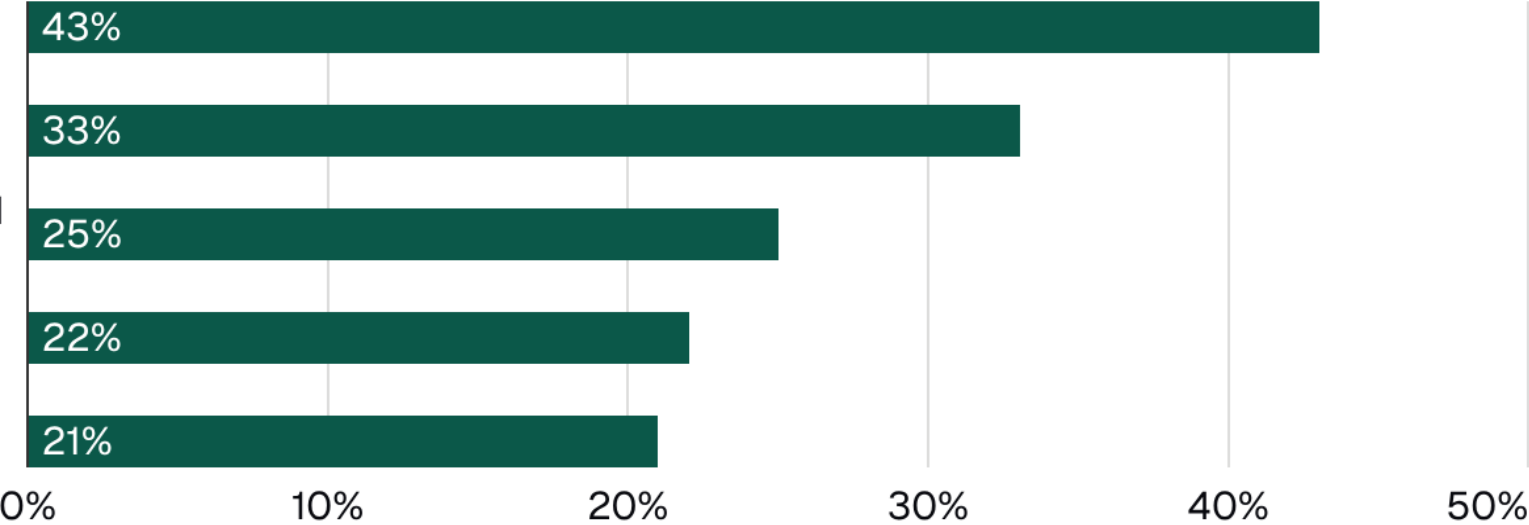


© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L5:** Thinking generally about people who might need help with their energy bills, what are the top things your electric or gas utility could do to improve the financial energy assistance application process? Choose up to two. **Notes:** LMI = low- and moderate-income. Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data. Responses for “Other” (1%) and “Don’t know” (10%) are not shown.

Messaging that makes LMI customers comfortable applying for financial energy assistance

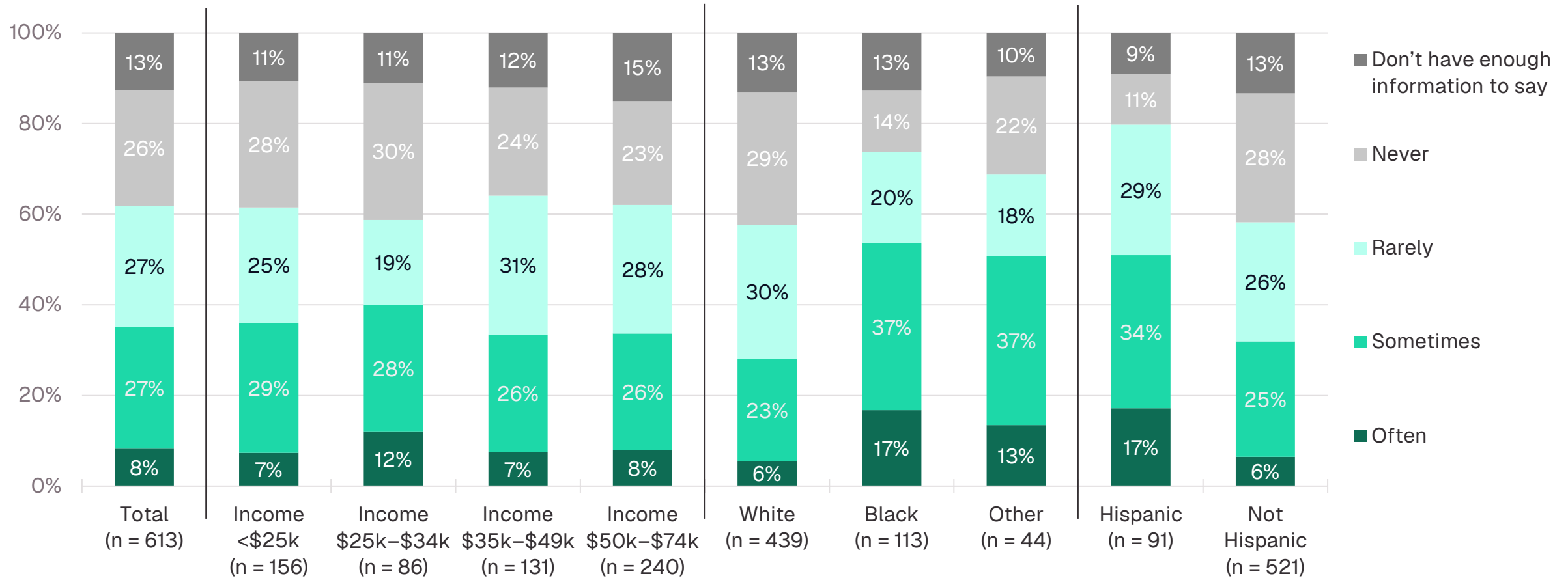
LMI customers most commonly said messages focused on saving energy and lowering bills or emphasizing that affordable energy is a universal right would make them most comfortable applying for assistance.

- Messages that focus on saving energy and lowering monthly bills
- Messages that emphasize affordable energy as something everyone deserves
- Messages that show the program is commonly used by a wide range of working households
- Programs and messages that use neutral, everyday language instead of terms like “assistance” or “aid”
- Messages that explain how the utility benefits from bills getting paid on time



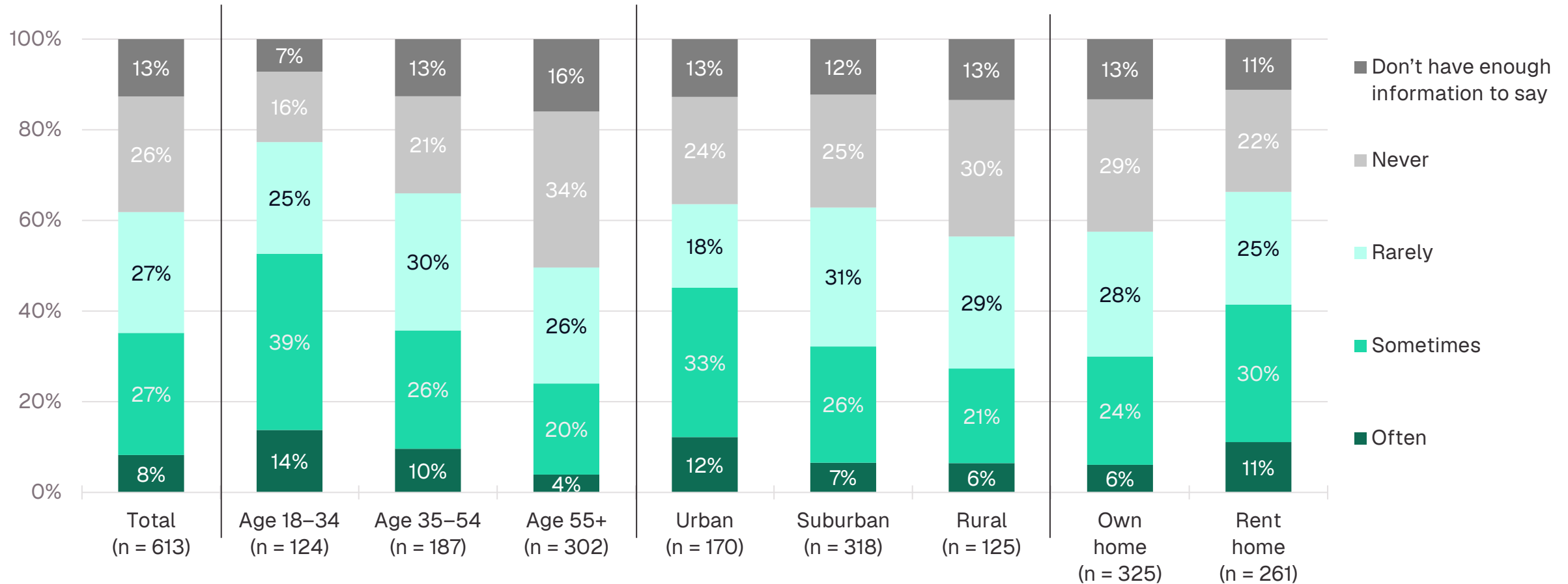
© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L6:** Which types of messaging would make you feel most comfortable applying for financial energy assistance? Choose up to two. **Notes:** LMI = low- and moderate-income. Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data. Responses for “None of these” (5%) and “Don’t know” (10%) are not shown.

Frequency you see messages that assistance programs are used by certain racial or ethnic groups



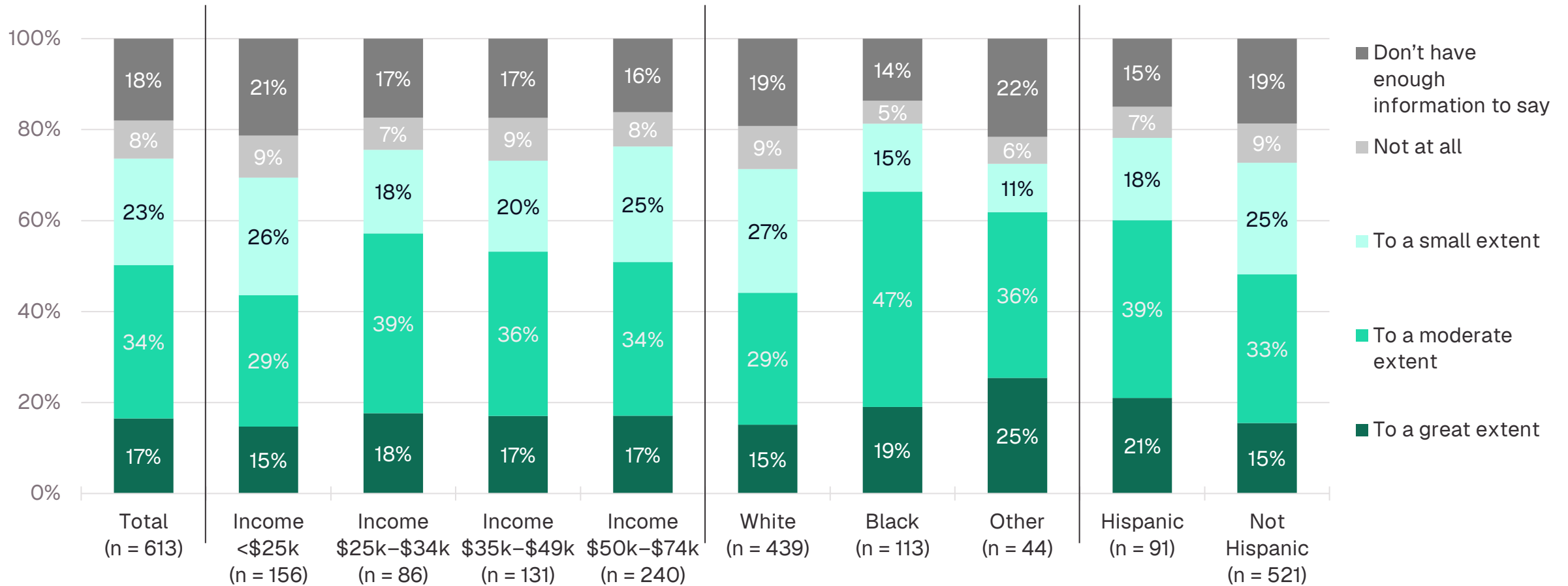
© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L7:** How often, if at all, do you come across messages, commentary, or conversations suggesting that financial energy assistance or other public benefits are mainly used by certain racial or ethnic groups? **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Frequency you see messages that assistance programs are used by certain racial or ethnic groups (continued)



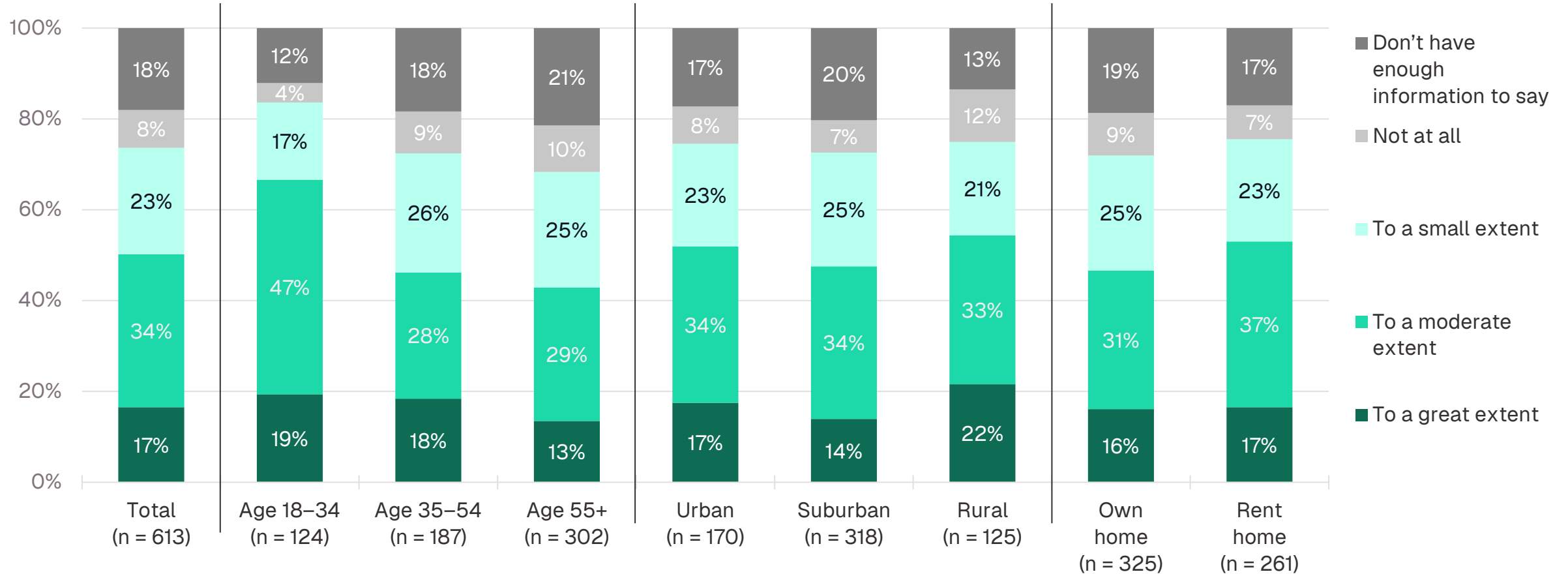
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Feeling that these messages could discourage enrollment in assistance programs



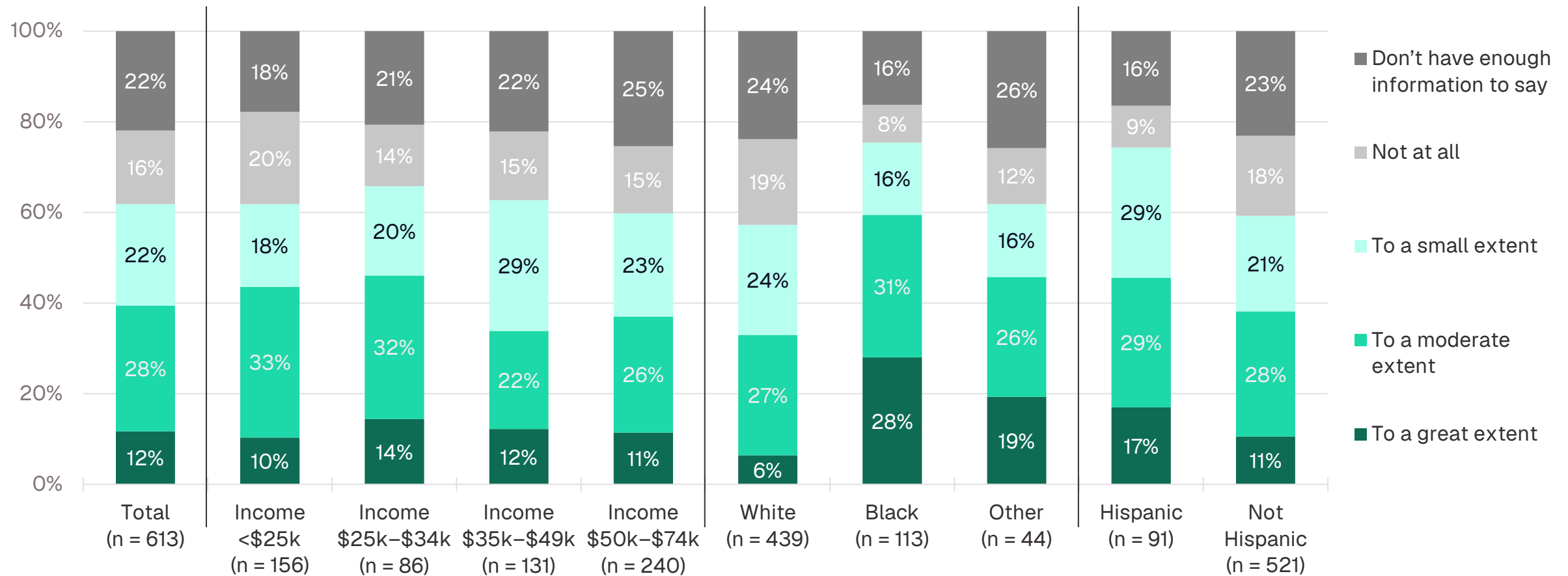
© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L8:** To what extent do you think messages or perceptions like these could discourage some eligible people from applying for financial energy assistance? **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Feeling that these messages could discourage enrollment in assistance programs (continued)



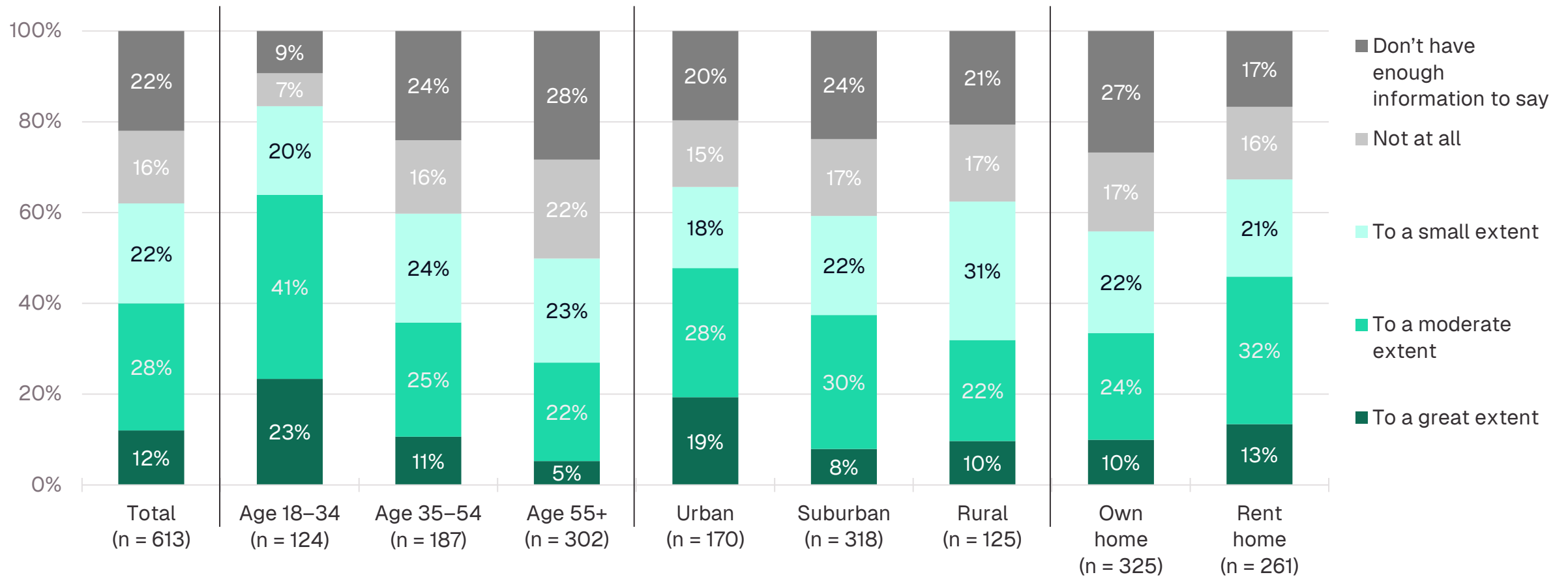
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Feeling that discrimination based on race and ethnicity exists in utility sector



© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L9:** Based on what you've seen or heard, to what extent do you think discrimination based on race or ethnicity exists in the utility sector (like how different neighborhoods in your area are treated when it comes to utility investment and service)? **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Feeling that discrimination based on race and ethnicity exists in utility sector (continued)



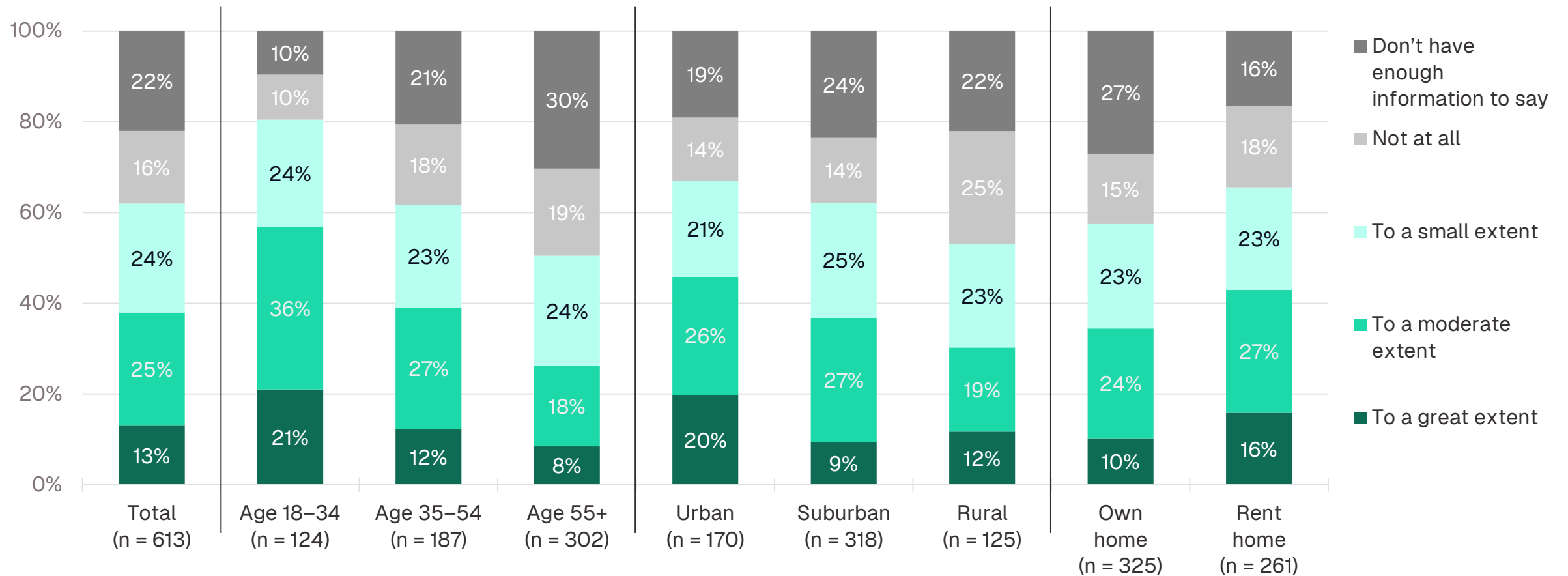
© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L9:** Based on what you've seen or heard, to what extent do you think discrimination based on race or ethnicity exists in the utility sector (like how different neighborhoods in your area are treated when it comes to utility investment and service)? **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Feeling that utilities make different decisions based on race/ethnicity of neighborhoods



© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L10:** To what extent do you think your electric or gas utility makes different decisions across neighborhoods based on racial or ethnic make-up when it comes to major infrastructure or large energy users (such as choosing where power plants or large power consumers, like data centers, warehouses, and factories are located)? **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Feeling that utilities make different decisions based on race/ethnicity of neighborhoods (continued)



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Recommendations

Utilities should place greater consideration of these barriers when designing their assistance offerings, especially their customer engagement, marketing and communications, and enrollment processes.

In designing and improving these offerings, utilities should ask themselves:

- **How might we increase awareness and make it easier for customers, especially those in arrears or before they miss a payment, to find and apply for energy assistance?** *Proactive multichannel, multilingual outreach; clear, benefit-focused messaging; and guided, multi-platform applications.*
- **How might we enable struggling customers to access other energy affordability offerings and wraparound assistance?** *Integrated offerings with single access points and categorical eligibility.*
- **How might we clarify or avoid eligibility requirements, and develop a streamlined process to get customers the help they need?** *Clear eligibility criteria, self-attestation, categorical eligibility, and simplified applications.*
- **How might we address the hidden barriers of stigma, fraud, and race in customers' perceptions of utilities and assistance offerings?** *Build trust through testimonials and referrals; transparent and standardized, respectful service; and adopt an equity lens for program qualification.*

Recent and upcoming activities

- [Q1 LMI Pulse Survey: The affordability crisis in the utility sector](#) (April 22)
- [How utilities can expand savings in weatherization programs](#) (May 1)
- [Affordability strategy virtual workshop](#) (May 12)
- [Affordability and arrears: What the data says, and what to do about it](#) (June 11)
- [Improving and streamlining the bill assistance journey](#) (June 22)
- [Alternative security deposits and credit innovations for income-qualified customers](#) (July 30)
- Q3 LMI Pulse Survey (fielding in August, reporting findings in September)

2026 Equity in a Clean Energy Economy executive workshop

[Register here](#)

August 19

Chicago Marriott Suites O'Hare

Executive council members will gather for a full day of networking, roundtable discussions, and research presentations.





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Sheraton Denver Downtown
1550 Court Pl, Denver, CO 80202

Contacts at E Source



Ben Nathan

Director, Affordability and Equity

ben_nathan@esource.com



Jamie Wimberly

Senior Vice President, Utility Customer Strategy

jamie_wimberly@esource.com

Appendix

Research methodology

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■ Results were weighted to match actual proportions in the population.

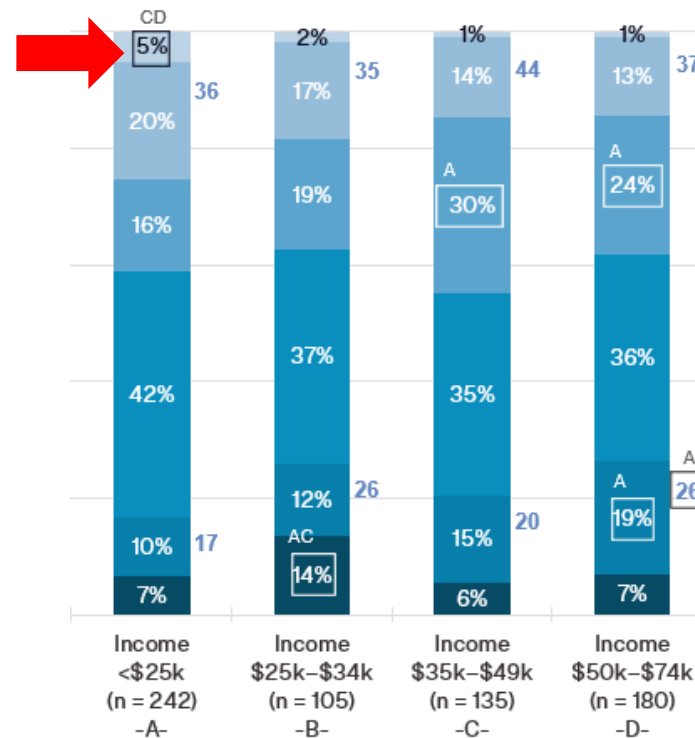
■ Bases shown in this report are the unweighted bases.

■ The survey was fielded by Russell Research; sample was provided by an external sample provider.

■ All research was conducted in compliance with all relevant legal and ethical requirements.

Statistical significance

A box around a number indicates that this figure is significantly higher than the other/indicated subgroup (the letters next to the boxes correspond to the letters at the bottom of the columns) at a 95% confidence level. Using less technical terms, one could say that the statistical significance of a result tells us something about the degree to which the result is “true.”



Key findings: Scams and trust

- 20% of respondents were not at all or not very confident they can tell the difference between legitimate and scam energy assistance offers. A similar proportion don't trust that their utility company can provide accurate information about these types of programs.
 - Those over the age of 35 and those living in non-urban areas have significantly less confidence than their counterparts that they will be able to tell a legitimate offer from a fraudulent one.
- When asked to choose methods would help them trust that an energy assistance offer is legitimate, the two most selected options were related to hearing directly from their utility. More than one-third (37%) selected “the messages come directly from my utility company” and about a quarter (26%) selected “the ability to speak directly with a utility representative.”
 - Younger customers were more likely than older customers to say they wanted clear guidance about how to spot or avoid common scams.
 - Older customers were more likely than younger customers to want to hear directly from their utility. We saw a similar dynamic when comparing renters and homeowners.

Key findings: Access

- One in five respondents disagreed that the application and enrollment process for energy assistance programs was designed to make it easy to apply.
 - White customers were less likely than Black customers to agree.
 - Customers age 55+ were less likely to agree than those age 18–34.
 - Homeowners were less likely to agree than renters.
- When asked to choose methods that could help improve the application process, the top suggestions were “utility staff who can guide customers through the application step by step” (37%), “automatically qualifying customers who already receive or qualify for other non-energy assistance programs” (37%), and “shorter applications with fewer required documents” (33%).
 - Those making less than \$25,000 per year were more likely to select “allowing customers to self-report income for eligibility” than those making \$50,000–\$75,000 per year.
 - Younger customers were more likely than older customers to select “allowing customers to self-report income for eligibility” and “using neutral, respectful language in program names and materials.”
 - Older customers were more likely than younger customers to select “a utility staff who can guide them through the application step by step.”

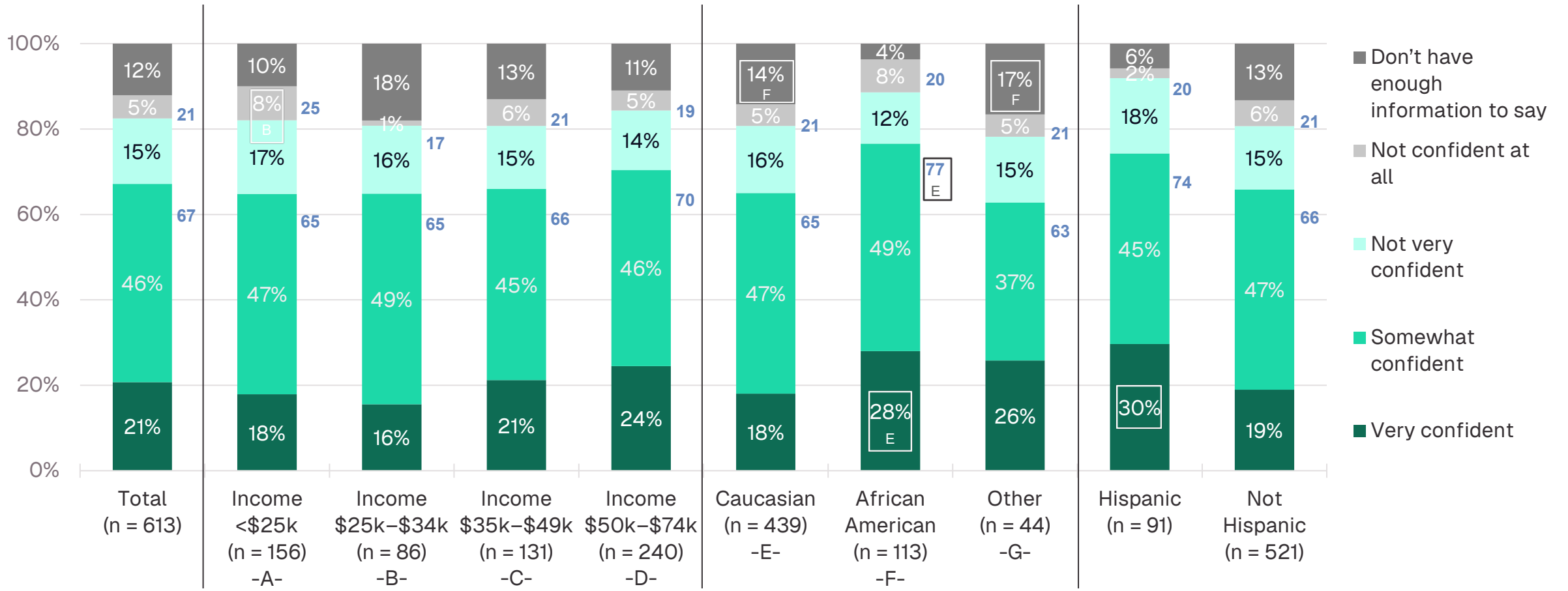
Key findings: Stigma and race

- When asked to choose types of messaging that would make them feel most comfortable applying for energy assistance, the most commonly selected were:
 - Messages that focus on saving energy and lowering monthly bills (43%)
 - Messages that emphasize affordable energy as something everyone deserves (33%)
 - Messages that show the program is commonly used by a wide range of working households (25%)
- In terms of messaging, commentary, or conversations related to energy assistance and other public benefits being used mainly by certain racial or ethnic groups, few said they have seen or heard these types of messages often and just over a quarter reported sometimes.
 - Black and Hispanic customers were more likely to say they often see these messages compared to white customers and those identifying as not Hispanic.
- Fifty percent of respondents reported thinking that perceptions that energy assistance or other public benefits are mainly used by certain racial or ethnic groups could discourage eligible people from applying for them.
 - Black customers were more likely to think this way when compared to white customers; we saw a similar pattern when comparing responses between younger customers and older customers.

Key findings: Race and discrimination

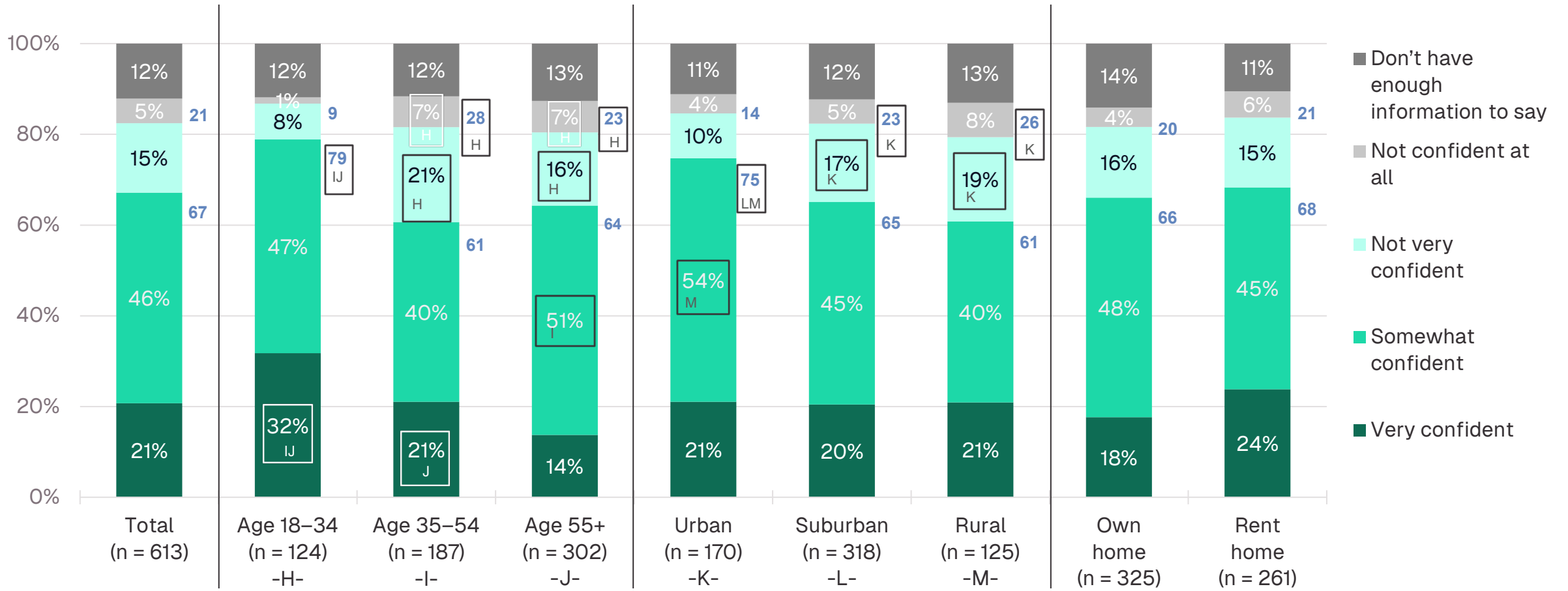
- Thirty-nine percent of respondents think discrimination based on race or ethnicity exists in the utility sector (like how different neighborhoods in your area are treated when it comes to utility investment and service).
 - Black customers were more likely to think this way than white customers; we saw a similar pattern when comparing younger and older respondents, those living in urban areas versus others, and renters versus homeowners.
- Thirty-eight percent of respondents think their utility makes different decisions across neighborhoods based on racial or ethnic make-up when it comes to major infrastructure or large energy users (like choosing where power plants or large power consumers, like data centers, warehouses, and factories are located).
 - Black customers reported thinking this at a higher rate than white customers; we saw similar patterns when comparing responses from younger, urban, and renter customers compared to their counterparts.

Confidence telling difference between legitimate and scam energy assistance offers



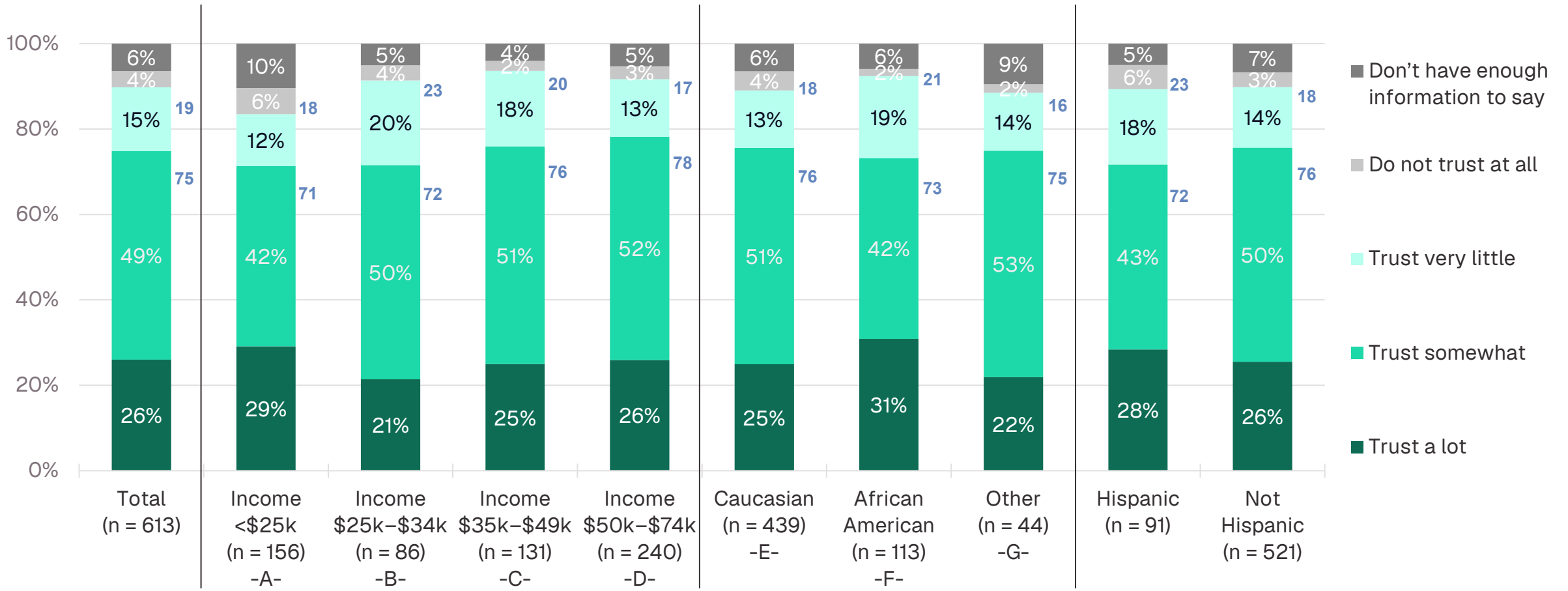
© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L1:** How confident are you that you can tell the difference between a legitimate financial energy assistance program and a scam or fraudulent offer? **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Confidence telling difference between legitimate and scam energy assistance offers (continued)



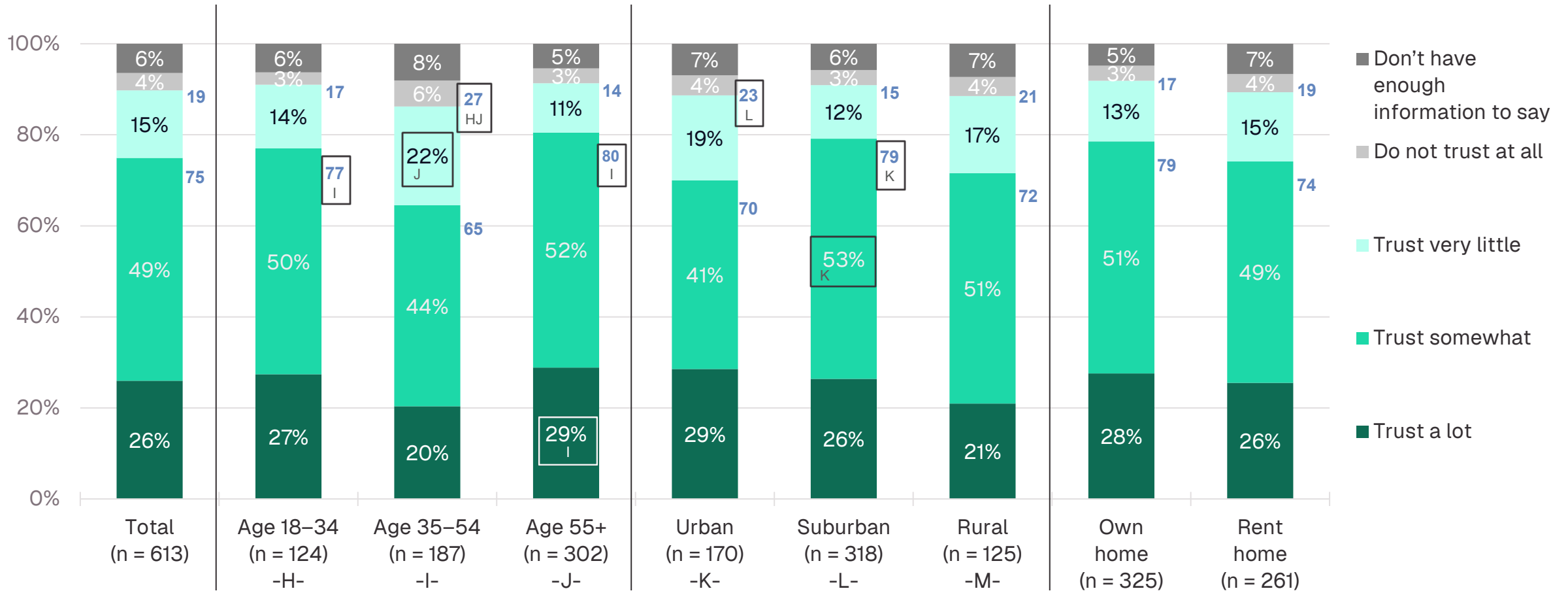
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Trust utility to provide accurate energy assistance program information



© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L2:** How much do you trust your electric or gas utility company to provide accurate information about financial energy assistance programs? **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Trust utility to provide accurate energy assistance program information (continued)



© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L2:** How much do you trust your electric or gas utility company to provide accurate information about financial energy assistance programs? **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

What would most help you trust that an offer for financial energy assistance is legitimate and not a scam?

	Total	Household income				Race			Ethnicity	
		Income <\$25k -A-	Income \$25k-\$34k -B-	Income \$35k-\$49k -C-	Income \$50k-\$74k -D-	Caucasian -E-	African American -F-	Other -G-	Hispanic	Not Hispanic
Total respondents	(613)	(156)	(86)	(131)	(240)	(439)	(113)	(44)	(91)	(521)
	%	%	%	%	%	%	%	%	%	%
The messages come directly from my utility company	37	31	32	43 ^A	40	40	32	26	34	38
The ability to speak directly with a utility representative	26	24	26	32	24	25	24	36	28	25
A government-run website or list of legitimate energy assistance programs	25	22	29	20	29	26	27	23	27	25
A phone number or website where I can verify the offer independently	21	19	18	21	23	20	25	22	25	20
Documentation that clearly explains program eligibility and funding source	20	29 ^{CD}	19	18	16	20	23	22	24	20
A referral from a trusted local organization (like a community action agency)	15	13	20	10	17	15	14	17	10	16
Clear guidance about how to spot or avoid common scams	14	17	17	13	11	11	18	13	18	13
None of these would help me trust that the offer is not a scam	5	6	3	4	5	5	5	2	6	5
Don't know	5	5	6	5	5	5	5	8	2	6

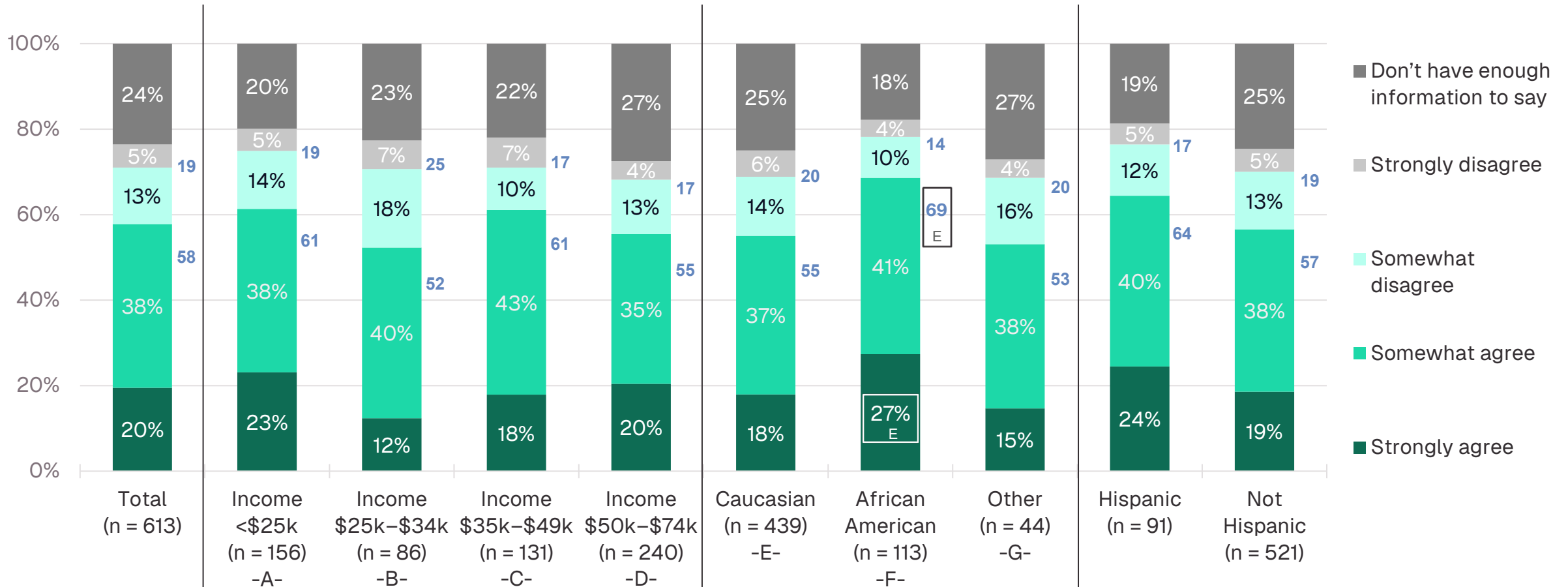
© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L3:** What would most help you trust that an offer for financial energy assistance is legitimate and not a scam? Choose up to two. **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

What would most help you trust that an offer for financial energy assistance is legitimate and not a scam? (continued)

	Total	Age			Type of community			Home ownership	
		Age 18–34 -H-	Age 35–54 -I-	Age 55+ -J-	Urban -K-	Suburban -L-	Rural -M-	Own home	Rent home
Total respondents	(613)	(124)	(187)	(302)	(170)	(318)	(125)	(325)	(261)
	%	%	%	%	%	%	%	%	%
The messages come directly from my utility company	37	32	31	45 ^{HI}	32	41	36	43	32
The ability to speak directly with a utility representative	26	19	26	29 ^H	24	25	29	29	21
A government-run website or list of legitimate energy assistance programs	25	22	27	26	28	24	24	22	27
A phone number or website where I can verify the offer independently	21	26	17	20	18	24	17	18	25
Documentation that clearly explains program eligibility and funding source	20	25	20	18	22	19	22	19	23
A referral from a trusted local organization (like a community action agency)	15	17	13	15	13	17	13	17	14
Clear guidance about how to spot or avoid common scams	14	25 ^J	16 ^J	5	15	15	10	10	18
None of these would help me trust that the offer is not a scam	5	2	9 ^{HJ}	4	7 ^L	3	7	5	5
Don't know	5	7	6	4	7	4	6	6	4

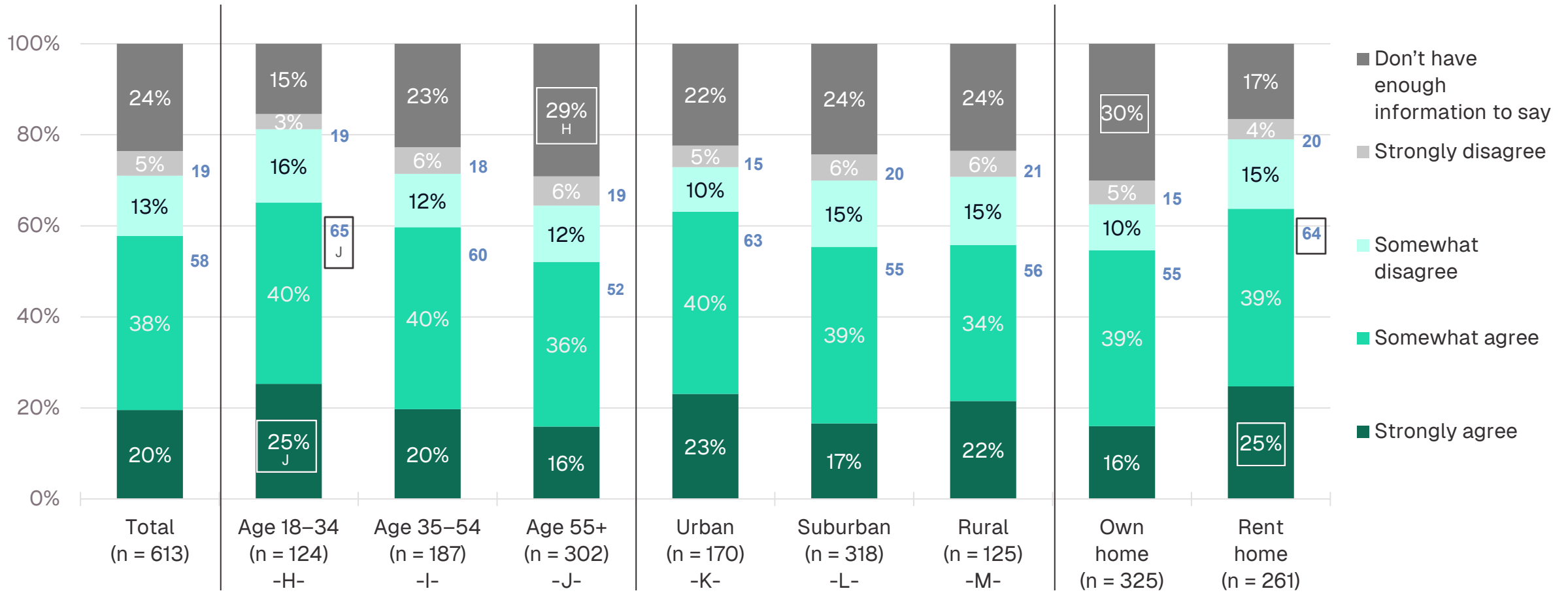
© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L3:** What would most help you trust that an offer for financial energy assistance is legitimate and not a scam? Choose up to two. **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Application & enrollment for energy assistance programs is easy for people like you to apply



© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L4:** To what extent do you agree or disagree that the application and enrollment process for financial energy assistance programs—like documentation requirements and application forms—is designed to make it easy for people like you to apply? **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Application & enrollment for energy assistance programs is easy for people like you to apply (continued)



© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L4:** To what extent do you agree or disagree that the application and enrollment process for financial energy assistance programs—like documentation requirements and application forms—is designed to make it easy for people like you to apply? **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

What are the top things your utility could do to improve the energy assistance application process?

	Total	Household income				Race			Ethnicity	
		Income <\$25k -A-	Income \$25k-\$34k -B-	Income \$35k-\$49k -C-	Income \$50k-\$74k -D-	Caucasian -E-	African American -F-	Other -G-	Hispanic	Not Hispanic
Total respondents	(613)	(156)	(86)	(131)	(240)	(439)	(113)	(44)	(91)	(521)
	%	%	%	%	%	%	%	%	%	%
Utility staff who can guide customers through the application step by step	37	32	42	38	39	39	31	39	36	38
Automatically qualifying customers who already receive or qualify for other non-energy assistance programs	37	41	28	36	38	37	35	40	43	36
Shorter applications with fewer required documents	33	30	41	32	33	33	35	31	36	32
A private online application	17	17	12	21	17	17	15	21	19	17
Allowing customers to self-report income for eligibility	17	23 ^D	14	17	13	15	26 ^{EG}	11	14	17
Using neutral, respectful language in program names and materials	12	10	13	17	11	12	13	8	14	12
Other	1	1	1	-	1	1	1	-	-	1
Don't know	10	11	11	6	11	10	8	11	5	11

© E Source (2026 Q2 LMI Customer Pulse Survey) **Base:** Total respondents with annual household incomes of less than \$75K (n = 613). **Question L5:** Thinking generally about people who might need help with their energy bills, what are the top things your electric or gas utility could do to improve the financial energy assistance application process? Choose up to two. **Notes:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

What are the top things your utility could do to improve the energy assistance application process? (continued)

	Total	Age			Type of community			Home ownership	
		Age 18–34 -H-	Age 35–54 -I-	Age 55+ -J-	Urban -K-	Suburban -L-	Rural -M-	Own home	Rent home
Total respondents	(613)	(124)	(187)	(302)	(170)	(318)	(125)	(325)	(261)
	%	%	%	%	%	%	%	%	%
Utility staff who can guide customers through the application step by step	37	34	30	44 ^{HI}	31	41	37	42	32
Automatically qualifying customers who already receive or qualify for other non-energy assistance programs	37	34	36	39	38	38	33	39	35
Shorter applications with fewer required documents	33	30	37	33	36	32	30	31	38
A private online application	17	21	17	16	13	17	23 ^K	17	18
Allowing customers to self-report income for eligibility	17	21 ^J	20 ^J	11	20	15	16	16	17
Using neutral, respectful language in program names and materials	12	21 ^{IJ}	11	8	13	13	10	10	13
Other	1	1	1	0	-	1	2	1	1
Don't know	10	5	13 ^H	11 ^H	11	9	11	11	8

© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L5:** Thinking generally about people who might need help with their energy bills, what are the top things your electric or gas utility could do to improve the financial energy assistance application process? Choose up to two. **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Which types of messaging would make you feel most comfortable applying for energy assistance?

	Total	Household income				Race			Ethnicity	
		Income <\$25k -A-	Income \$25k-\$34k -B-	Income \$35k-\$49k -C-	Income \$50k-\$74k -D-	Caucasian -E-	African American -F-	Other -G-	Hispanic	Not Hispanic
Total respondents	(613)	(156)	(86)	(131)	(240)	(439)	(113)	(44)	(91)	(521)
	%	%	%	%	%	%	%	%	%	%
Messages that focus on saving energy and lowering monthly bills	43	41	46	48	42	43	41	45	40	44
Messages that emphasize affordable energy as something everyone deserves	33	35	33	25	36 ^C	33	36	38	37	32
Messages that show the program is commonly used by a wide range of working households	25	29	25	24	23	25	27	20	27	25
Programs and messages that use neutral, everyday language instead of terms like “assistance” or “aid”	22	17	21	26	24	20	31 ^E	23	35	20
Messages that explain how the utility benefits from bills getting paid on time	21	24	18	21	20	19	29 ^E	26	19	22
None of these	5	7	8	4	4	7	2	2	3	6
Don't know	10	7	11	11	11	12 ^F	4	8	7	10

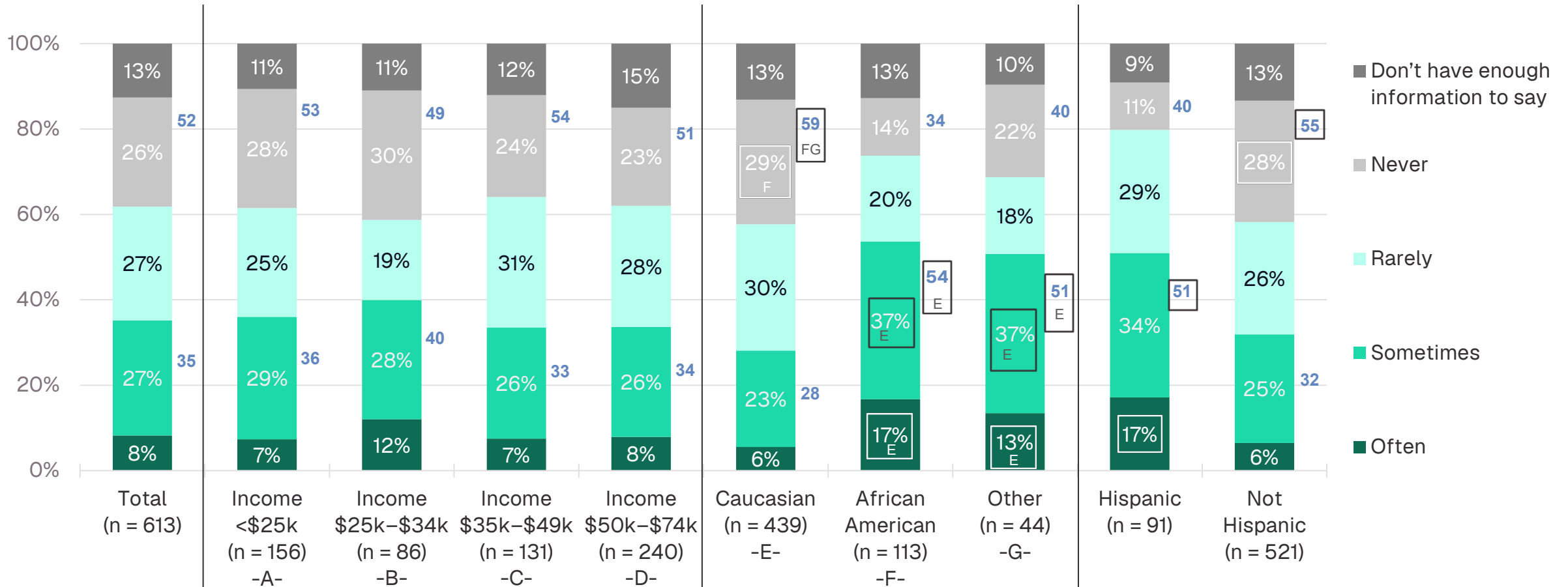
© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L6:** Which types of messaging would make you feel most comfortable applying for financial energy assistance? Choose up to two. **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Which types of messaging would make you feel most comfortable applying for energy assistance? (continued)

	Total	Age			Type of community			Home ownership	
		Age 18–34 -H-	Age 35–54 -I-	Age 55+ -J-	Urban -K-	Suburban -L-	Rural -M-	Own home	Rent home
Total respondents	(613)	(124)	(187)	(302)	(170)	(318)	(125)	(325)	(261)
	%	%	%	%	%	%	%	%	%
Messages that focus on saving energy and lowering monthly bills	43	43	43	44	37	48 ^K	41	44	41
Messages that emphasize affordable energy as something everyone deserves	33	40 ^J	33	29	41 ^M	32	23	30	36
Messages that show the program is commonly used by a wide range of working households	25	26	27	24	23	25	29	26	25
Programs and messages that use neutral, everyday language instead of terms like “assistance” or “aid”	22	26	22	20	20	23	23	22	24
Messages that explain how the utility benefits from bills getting paid on time	21	23	26 ^J	16	27	20	17	18	25
None of these	5	3	5	7	3	6	8	6	4
Don’t know	10	5	11	13 ^H	9	10	12	11	8

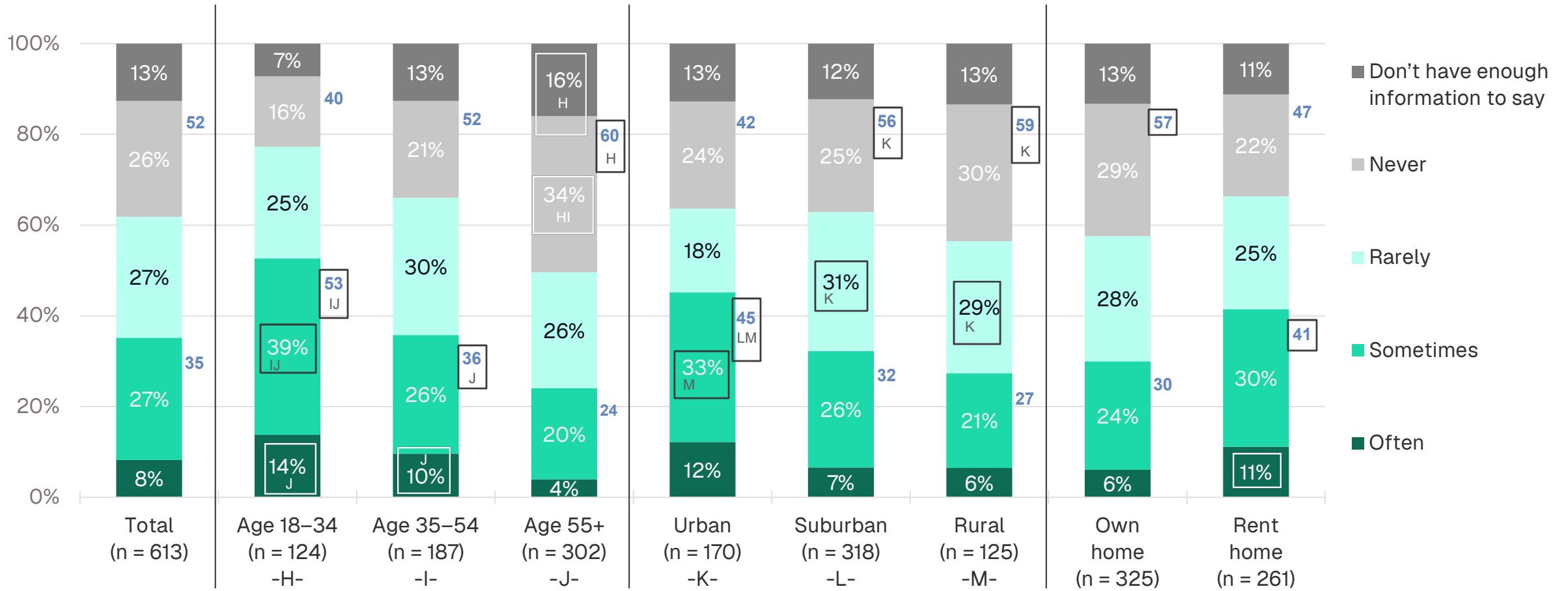
© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L6:** Which types of messaging would make you feel most comfortable applying for financial energy assistance? Choose up to two. **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Frequency you see messages that assistance programs are used by certain racial or ethnic groups



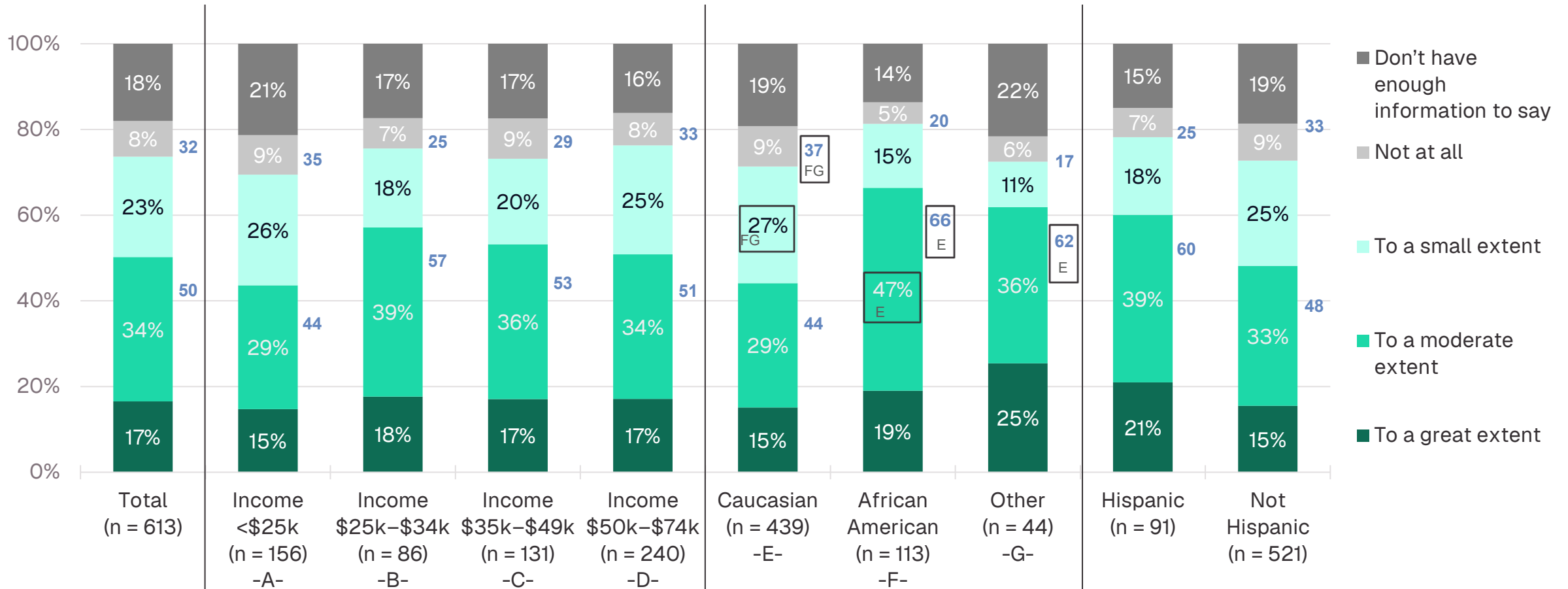
© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L7:** How often, if at all, do you come across messages, commentary, or conversations suggesting that financial energy assistance or other public benefits are mainly used by certain racial or ethnic groups? **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Frequency you see messages that assistance programs are used by certain racial or ethnic groups (continued)



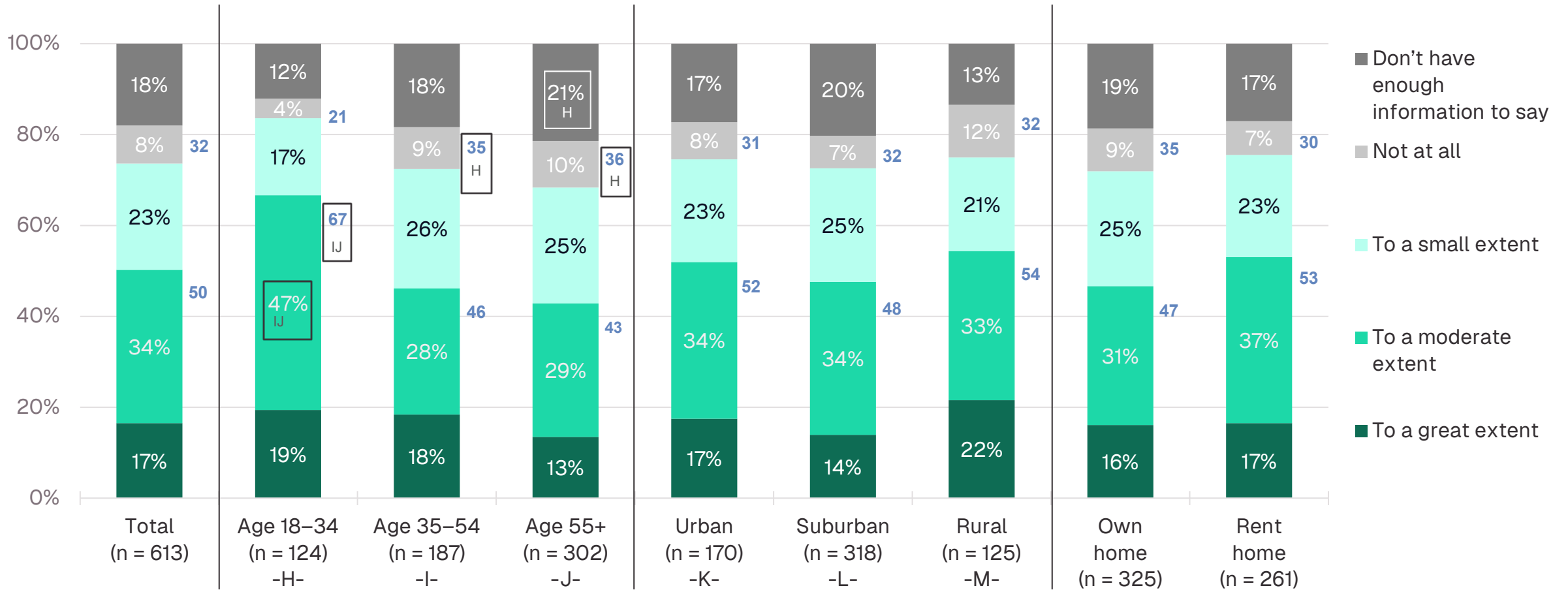
© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L7:** How often, if at all, do you come across messages, commentary, or conversations suggesting that financial energy assistance or other public benefits are mainly used by certain racial or ethnic groups? **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Feeling that these messages could discourage enrollment in assistance programs



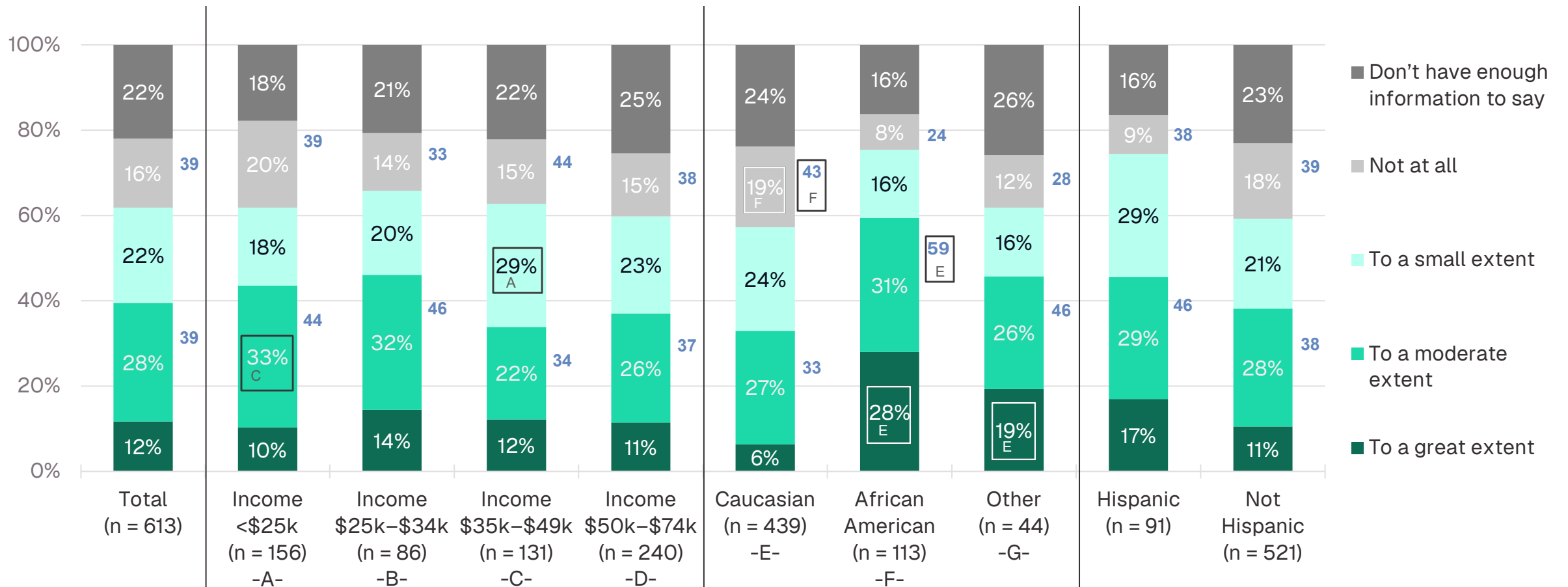
© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L8:** To what extent do you think messages or perceptions like these could discourage some eligible people from applying for financial energy assistance? **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Feeling that these messages could discourage enrollment in assistance programs (continued)



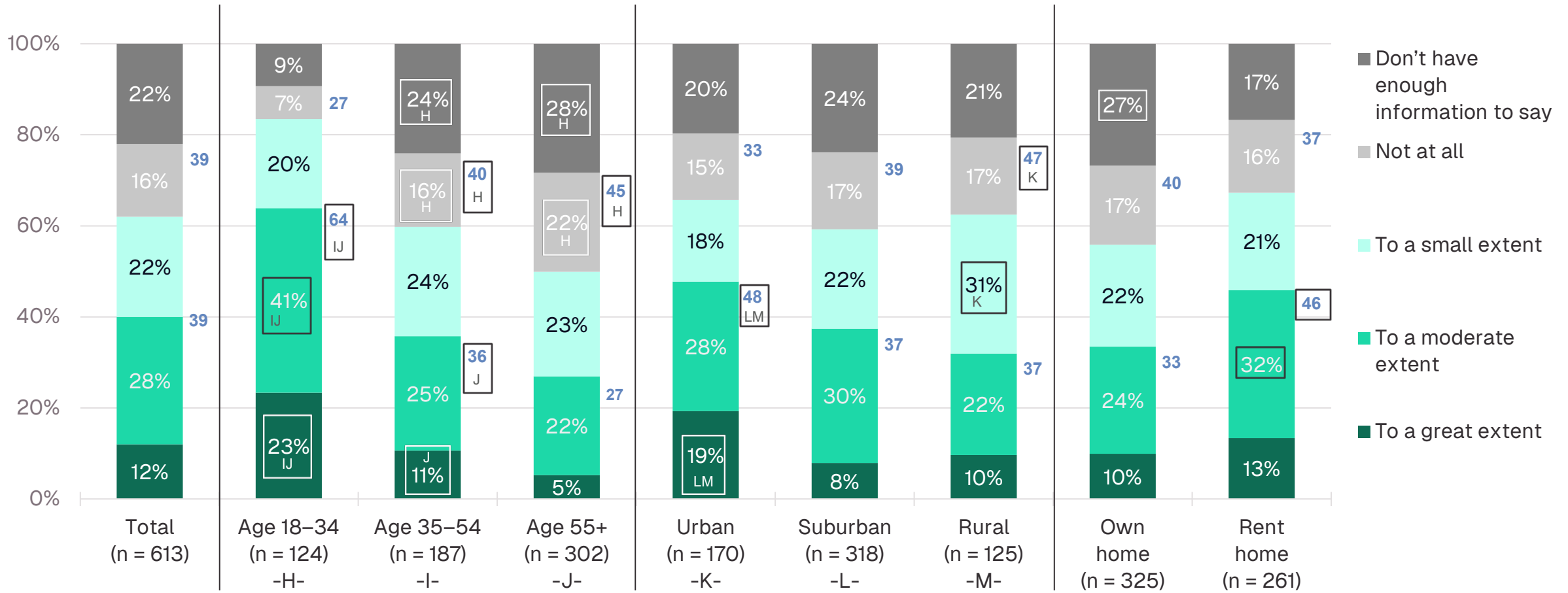
© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L8:** To what extent do you think messages or perceptions like these could discourage some eligible people from applying for financial energy assistance? **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Feeling that discrimination based on race or ethnicity exists in utility sector



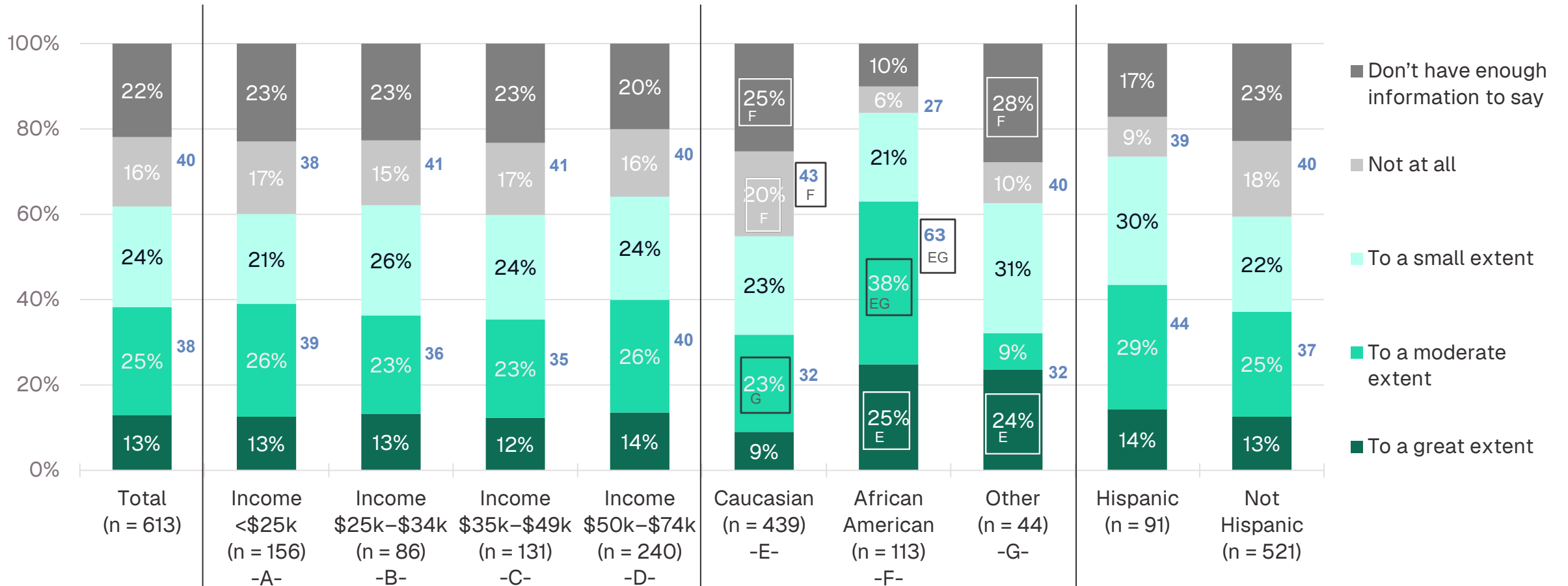
© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L9:** Based on what you've seen or heard, to what extent do you think discrimination based on race or ethnicity exists in the utility sector (like how different neighborhoods in your area are treated when it comes to utility investment and service)? **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Feeling that discrimination based on race or ethnicity exists in utility sector (continued)



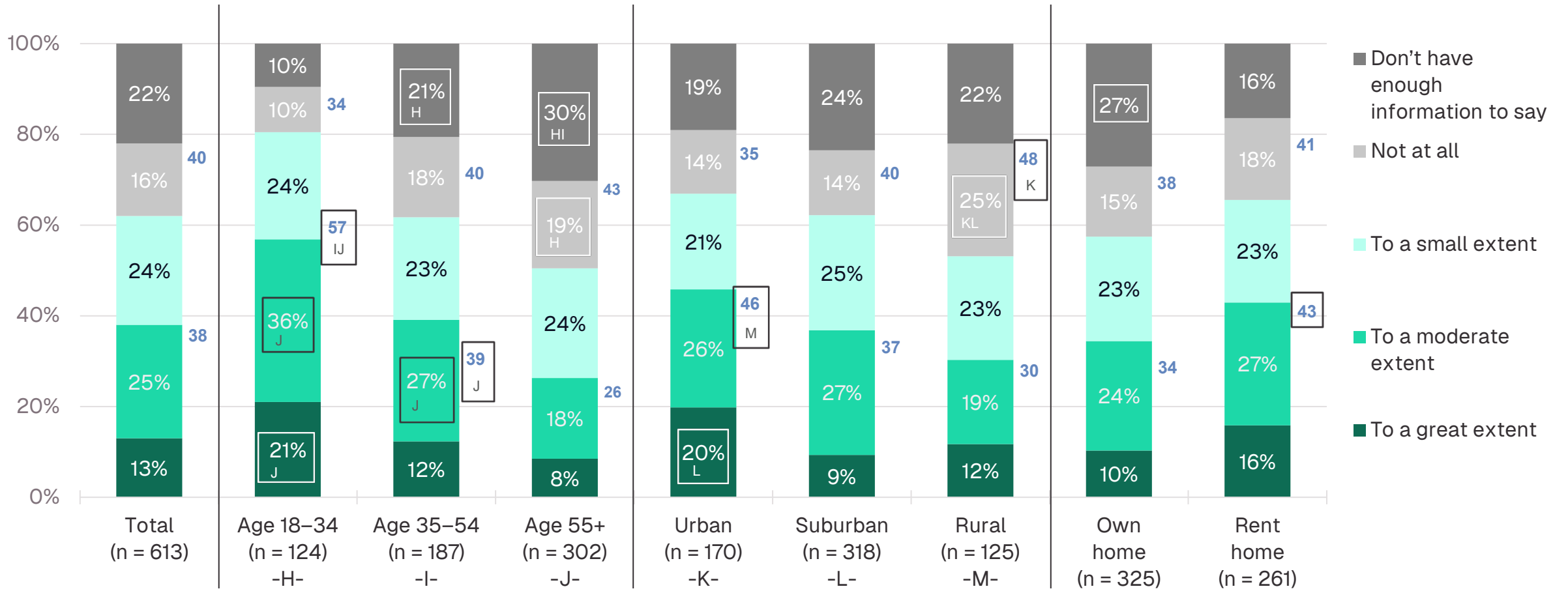
© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L9:** Based on what you've seen or heard, to what extent do you think discrimination based on race or ethnicity exists in the utility sector (like how different neighborhoods in your area are treated when it comes to utility investment and service)? **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Feeling that utilities make different decisions based on race or ethnicity of neighborhoods



© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L10:** To what extent do you think your electric or gas utility makes different decisions across neighborhoods based on racial or ethnic make-up when it comes to major infrastructure or large energy users (such as choosing where power plants or large power consumers, like data centers, warehouses, and factories are located)? **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.

Feeling that utilities make different decisions based on race/ethnicity of neighborhoods (continued)



© E Source (2026 Q2 LMI Customer Pulse Survey). **Base:** Total respondents with annual household incomes of less than \$75,000 (n = 613). **Question L10:** To what extent do you think your electric or gas utility makes different decisions across neighborhoods based on racial or ethnic make-up when it comes to major infrastructure or large energy users (such as choosing where power plants or large power consumers, like data centers, warehouses, and factories are located)? **Note:** Percentages shown in the chart reflect weighted data; sample sizes (n) are based on unweighted data.