



2011 Residential Customer Satisfaction Study ~ New Hampshire ~

Prepared by Interviewing Service of America, Inc.

January 2012

Table of Contents

	<u>Page</u>
Objectives, Background & Methodology, Demographic Profile	3
Detailed Findings:	
1. Overall Satisfaction	7
2. Perceptions of National Grid	14
3. Social Responsibility Issues	19
4. Contact with National Grid	24
5. Reliability: Outages & Power Quality	30
6. Rates & Billing	36
7. Internet	40
8. Communications with Customers	45
Conclusions & Recommendations	51
Appendix	56

Objectives

Background & Methodology

Respondent Demographic Profile

Project Objectives

- ◆ Evaluate current levels of satisfaction with National Grid among New Hampshire residents
- ◆ Compare trends in New Hampshire Residential customer satisfaction over time (back to 2003 where available)

Background & Methodology

- ◆ This study has been conducted annually since 1997 for New Hampshire.
- ◆ Residential customers were randomly selected for participation in the survey. The survey sample is representative of the National Grid residential customer base in New Hampshire.
- ◆ Base counts throughout this report refer to total responding, eliminating those with no opinion or “don’t know” responses, or who are not asked the question due to a skip pattern.
- ◆ Sampling Error
 - ◆ As is the case in all survey samples, there is an element of sampling error that is known and measurable when making projections to the universe of all National Grid residential customers. Sampling error varies inversely with the size of the sample.
 - ◆ With a sample size of 1,000 and a 90% level of confidence, the range of error for proportions observed in this survey is +/- 2.53 percentage points.

Respondent Demographic Profile - 2011 Survey

Main Heat Source for Home		New Hampshire		
	<u>2009</u>	<u>2010</u>	<u>2011</u>	
Oil	61%	59%	60%	
Natural Gas	3	2	1	
Electric	7	6	6	
Propane	18	19	18	
Wood	8	11	12	
Other/incl with rent	3	3	3	
	100%	100%	100%	

Home Ownership		New Hampshire		
	<u>2009</u>	<u>2010</u>	<u>2011</u>	
Rent	13%	12%	10%	
Own	87	88	90	
Refused/DK	0	0	0	
	100%	100%	100%	

Gender		New Hampshire		
	<u>2009</u>	<u>2010</u>	<u>2011</u>	
Male	42%	44%	43%	
Female	58	56	57	
	100%	100%	100%	

Total Household Income		New Hampshire		
	<u>2009</u>	<u>2010</u>	<u>2011</u>	
Under \$20,000	10%	14%	8%	
\$20,000-\$39,999	18	17	19	
\$40,000-\$74,999	31	29	28	
\$75,000-\$125,000	28	25	29	
Over \$125,000	13	15	16	
	100%	100%	100%	

Type of Home		New Hampshire		
	<u>2009</u>	<u>2010</u>	<u>2011</u>	
Single	86%	87%	89%	
Multi-family/Apartment	14	13	11	
Other	0	0	0	
Refused/DK	0	0	0	
	100%	100%	100%	

Air Conditioning		New Hampshire		
	<u>2009</u>	<u>2010</u>	<u>2011</u>	
% w/ Central Air Conditioning*	18%	18%	20%	
No room or window units*	45	46	45	
1 room or window unit*	21	20	21	
2 room or window units*	19	19	20	
3+ room or window units*	15	15	14	
* Multiple Responses Allowed				

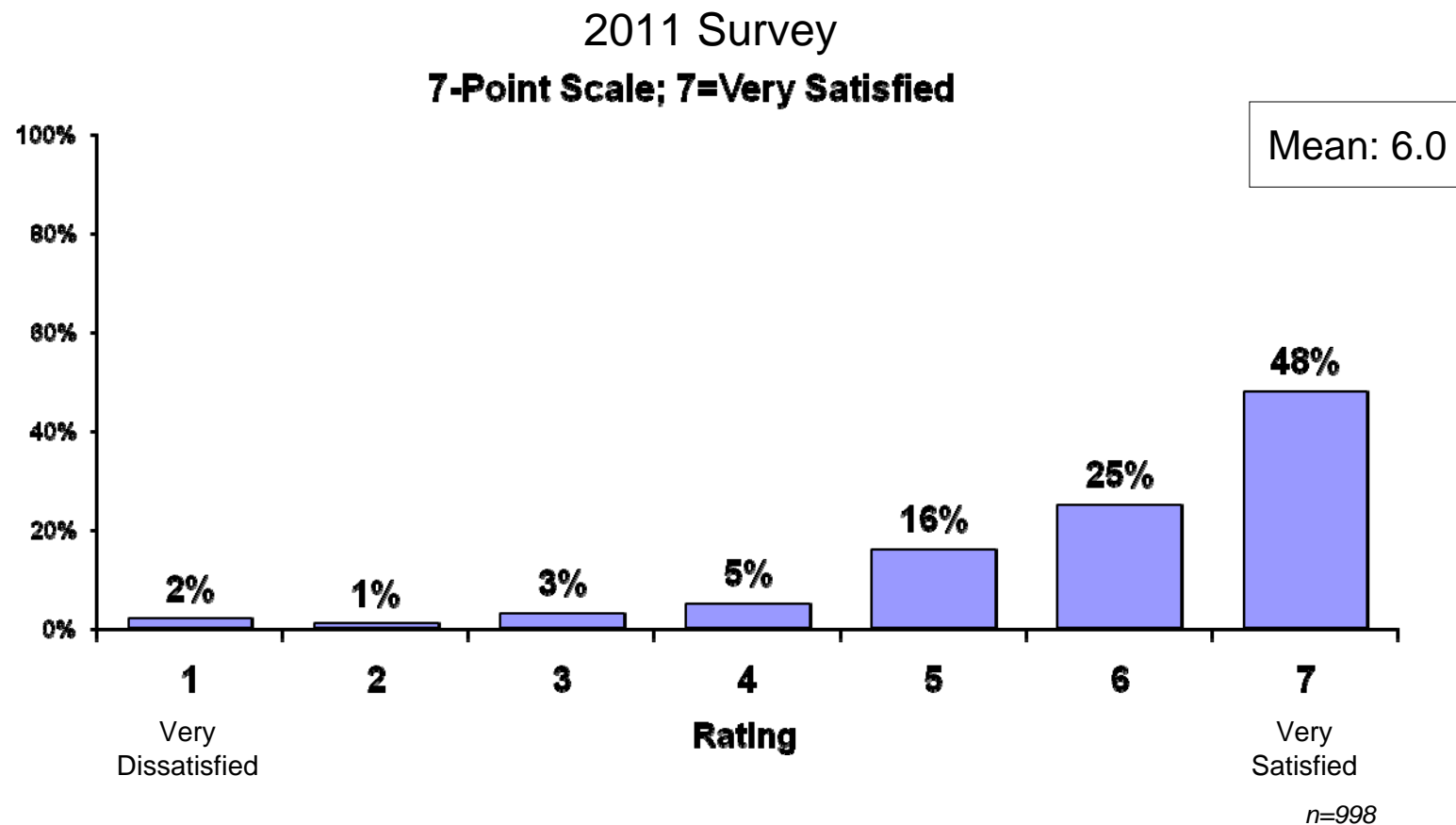
2009 n=1000
2010 n=1000
2011 n=1000

Detailed Findings

1. Overall Satisfaction

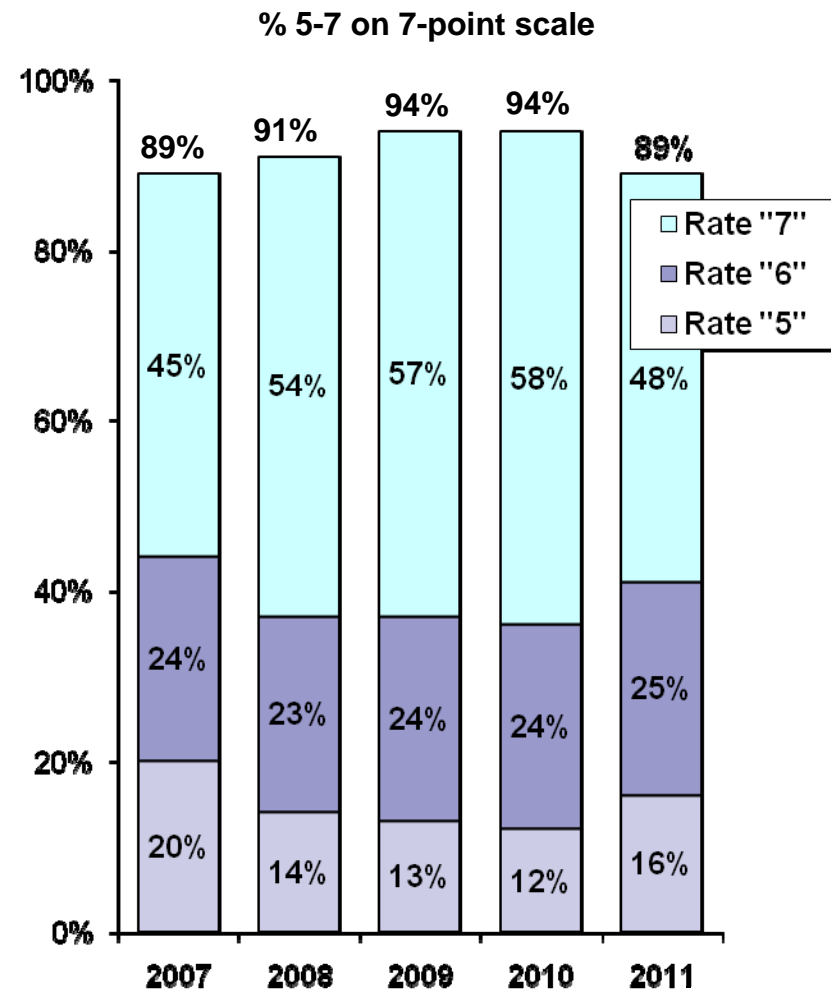
Overall Satisfaction with National Grid is Fairly High

- Most residents give a rating of “5” or higher (89% rate 5-7); few give low ratings.



Overall Satisfaction with National Grid is at the Lowest Level Since 2007

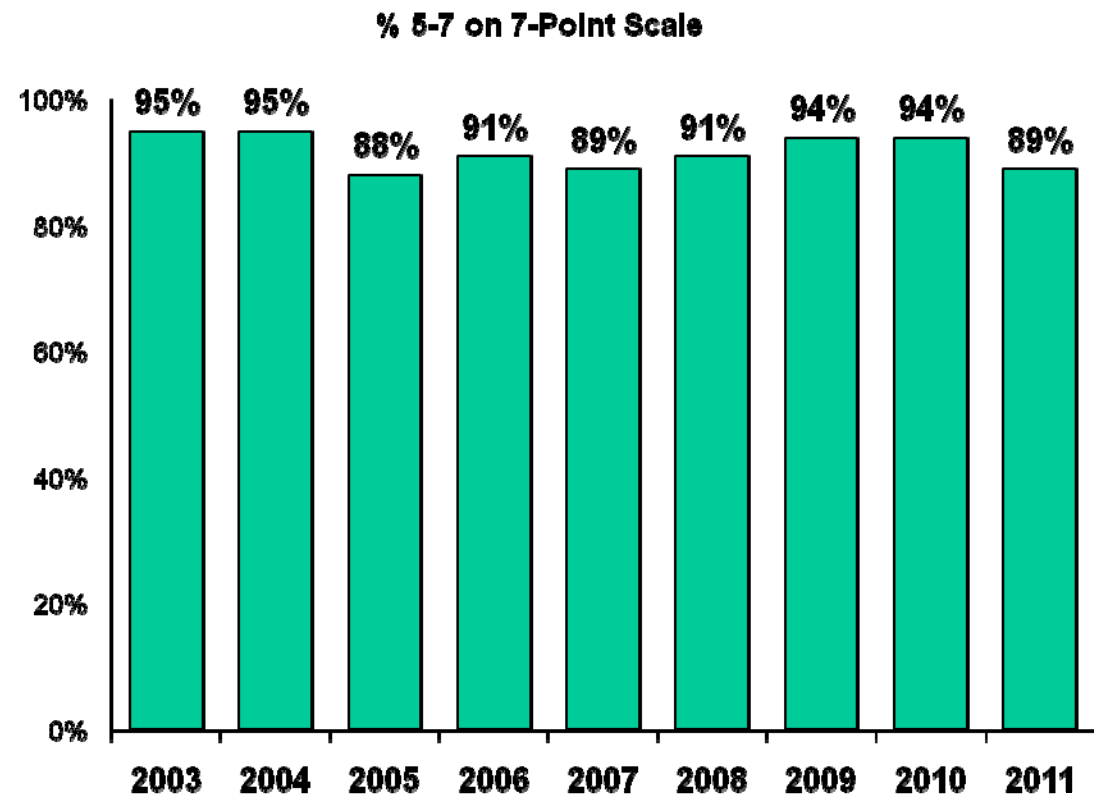
- Overall satisfaction with National Grid decreased compared to last year; the top three box rating (5-7) decreased five points this year (from 94% to 89%).
- In addition, 10 percentage points fewer give the highest rating ("7") this year.



2007 n=1134; 2008 n=994; 2009 n=996; 2010 n=996; 2011 n=998

Overall Satisfaction with National Grid Ties 2007 Rating

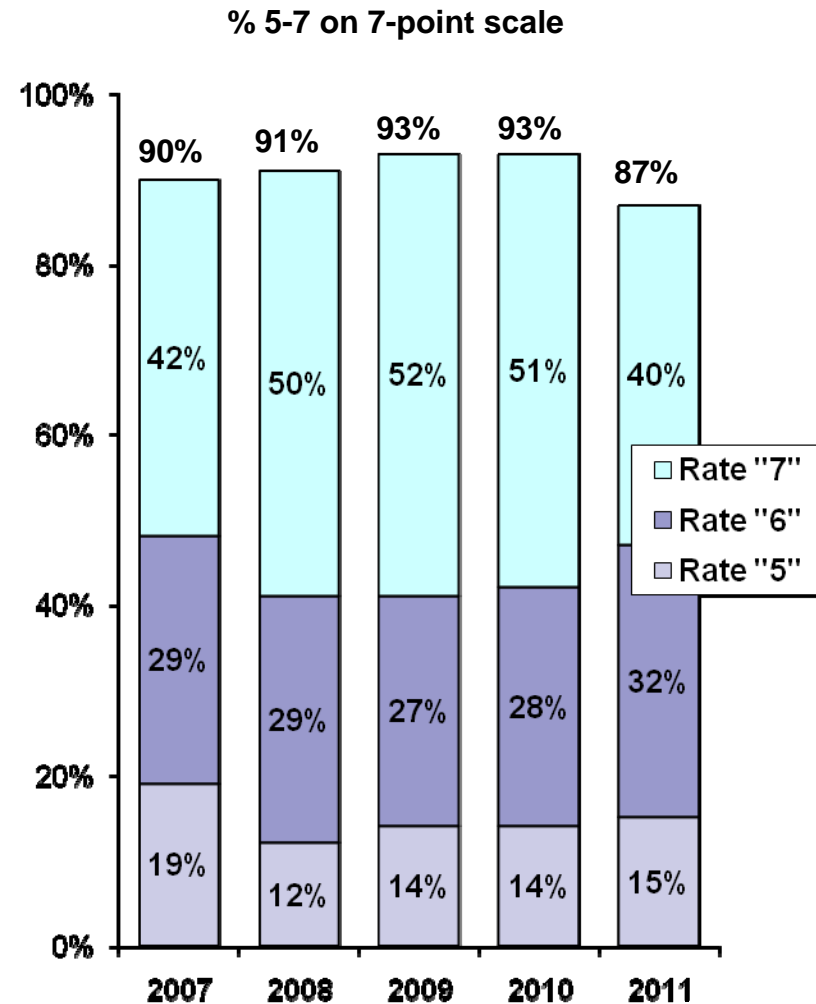
- Overall satisfaction for NH residents is 89% (rate 5-7).
- Compared to the past nine years, satisfaction was lower in only one year - 2005.



Base: 2011 n=998

Satisfaction Excluding Price has Decreased Dramatically

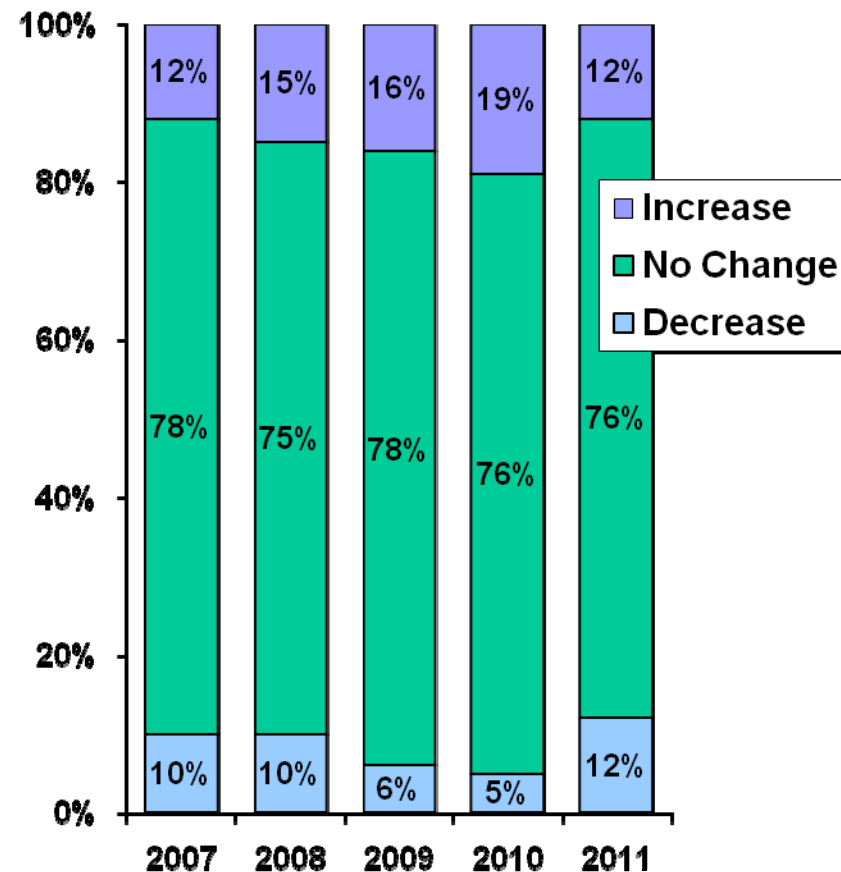
- A second measure of satisfaction, overall satisfaction excluding price, dropped six points this year from 93% to 87%.
- In 2011, only 40% give the highest rating ("7") compared to half or more giving the highest rating in the past three years.
- In addition, the top three box rating is at its lowest level (87%) since this has been measured.



Base: 2011 n=1000

Fewer Claim their Satisfaction has Increased; More Say It Decreased

- Similar to results from all previous surveys, most NH residents this year (76%) say their satisfaction has remained the same as the prior year.
- However, fewer claim to have experienced an increase in satisfaction in 2011 (from 19% down to 12%) while more have experienced a decrease (from 5% up to 12%).

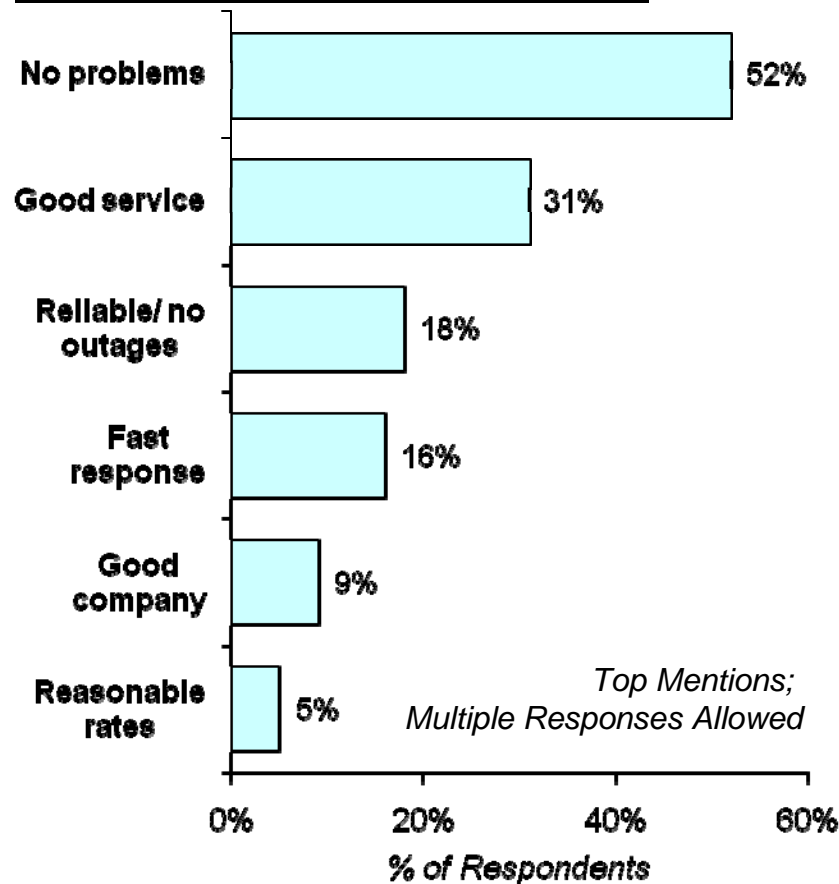


Base: 2011 n=1000

Lack of Problems Contribute to Satisfaction; Power Outages Create Dissatisfaction

2011 Survey

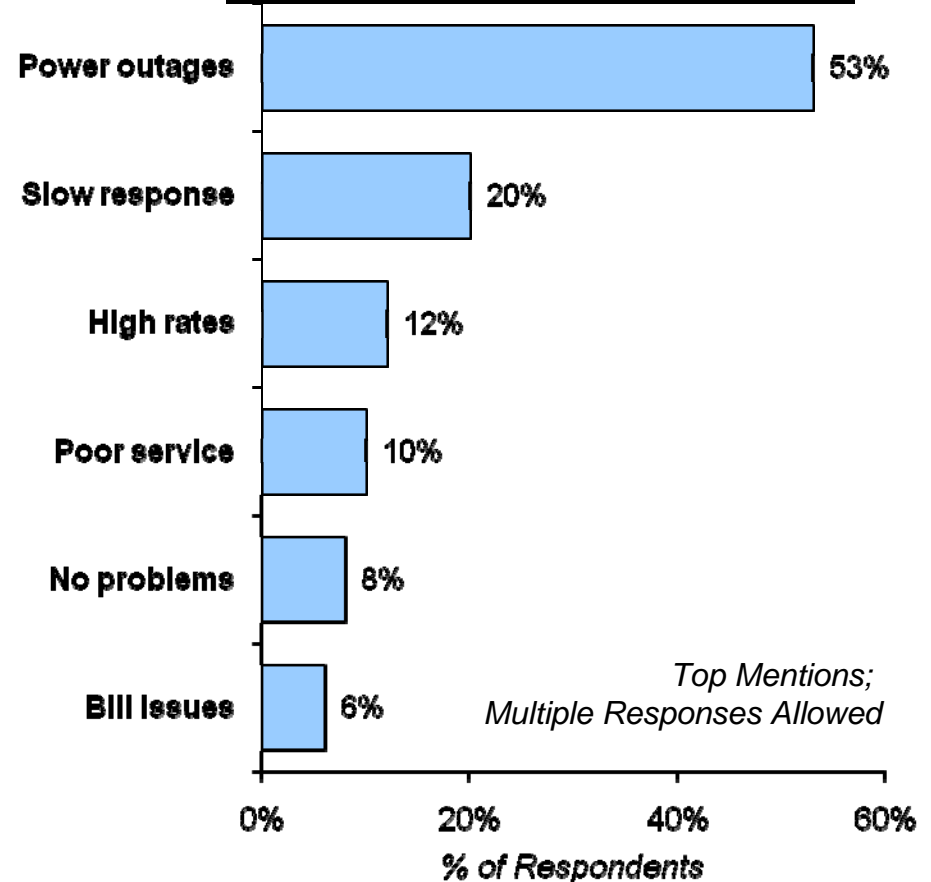
More Satisfied Customers Cite:



More Satisfied=6-7 on 7-Point Scale

n=725

Less Satisfied Customers Cite:



Less Satisfied=1-5 on 7-Point Scale

n=265

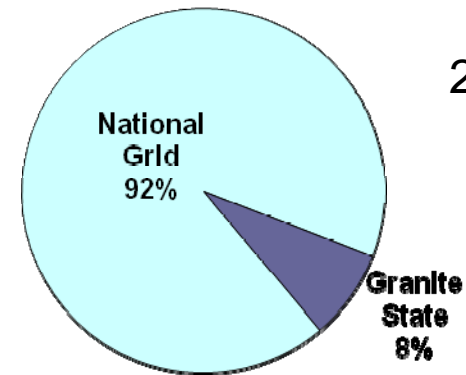
Detailed Findings

2. Perceptions of National Grid

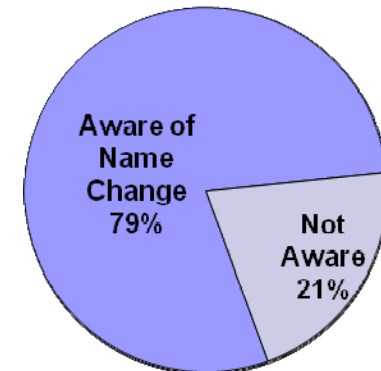
Awareness of National Grid as Electric Company is High

- Nearly all survey respondents are aware of National Grid as their electric company (92%).
 - Most of those who named Granite State as their electric company (79%) are aware that the name has been changed.

Base=Aware of Utility Name; n=1000



2011 Survey

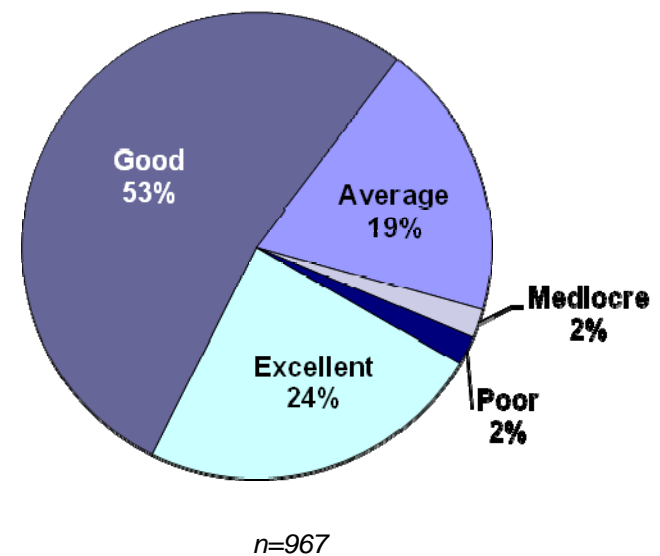


Base=Named Granite State as Local Utility; n=76

National Grid has a Strong Reputation as a Company

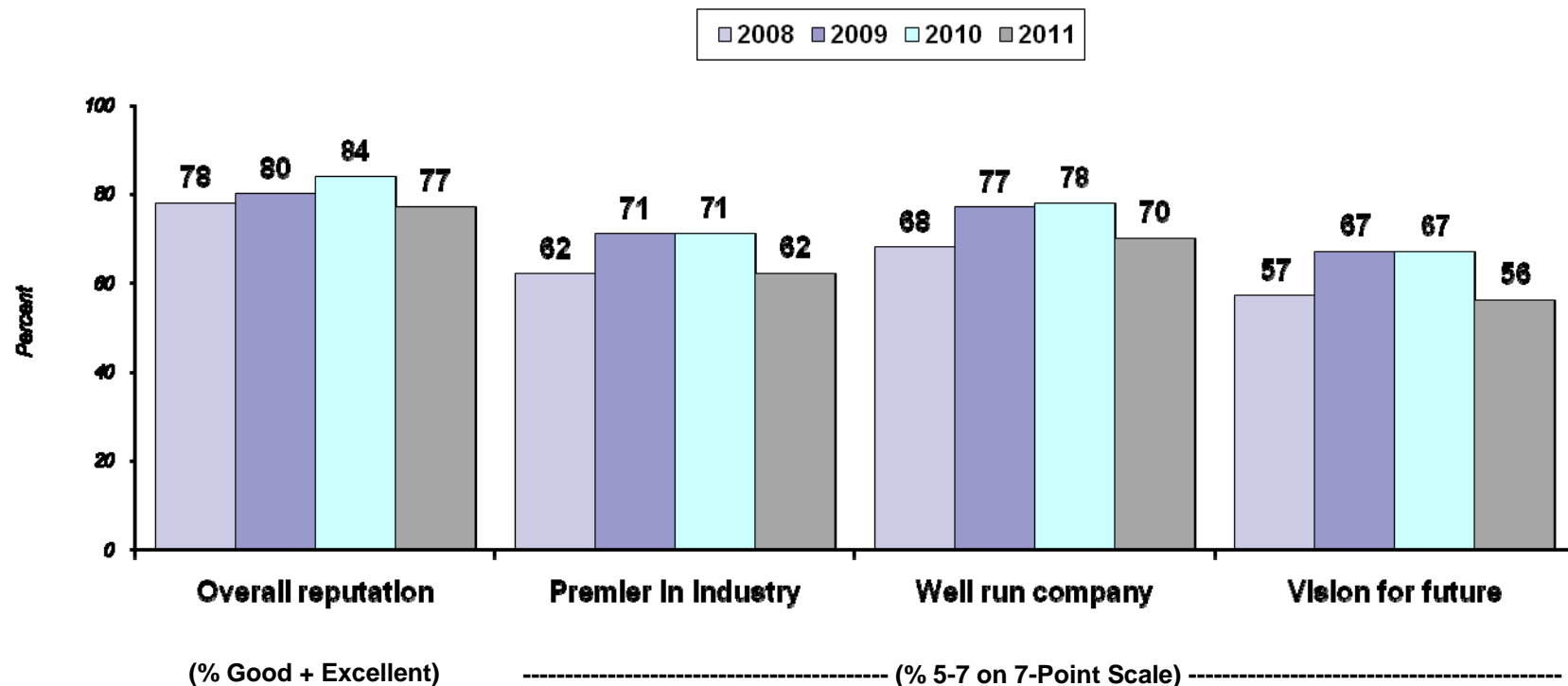
- Three in four NH residents consider National Grid an excellent or good company (77%).

2011 Survey



Perceptions of Business Aspects - Trended

- Perceptions of all the business aspects shown below decreased in 2011.
- The largest decline (-11 points) is for vision for the future; the smallest decline (-7 points) concerns the company's overall reputation.



Differences Between Highly Satisfied vs. Less Satisfied Customers Regarding Perceptions of Performance on Business Aspects

- Highly satisfied and less satisfied customers have widely differing perceptions of National Grid in terms of performance on all four of the business aspects measured in the survey.
- Overall reputation has the largest gap between the two segments (36 points).

2011 Survey (20+ point differences circled)	Highly Satisfied <u>Overall</u> (% 6-7)	Less Satisfied <u>Overall</u> (% 1-5)	Percentage Point Difference
(Base)	(729)	(269)	
Vision for the future (% 5-7)	62%	39%	23
Being a well run company (% 5-7)	78	47	31
Being premier in its industry (% 5-7)	71	40	31
Overall reputation (% 5-7)	85	49	36

Detailed Findings

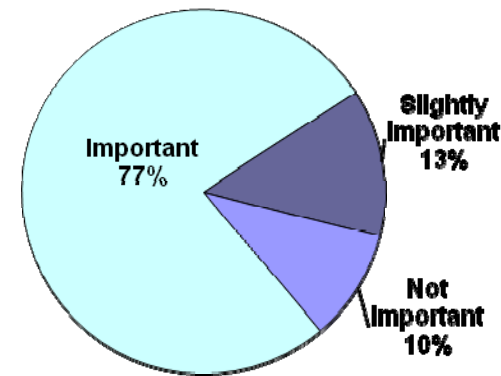
3. Social Responsibility Issues

Utilities are Expected to Play a Role in Minimizing Global Climate Change

- Most NH residents believe that global climate change is important (77%) and that utilities have an important role in minimizing the impact (90%).

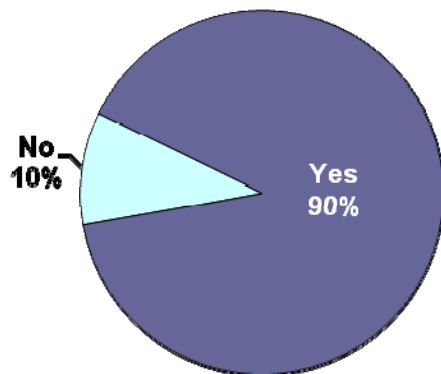
Issue of Global Climate Change is...

2011
Survey



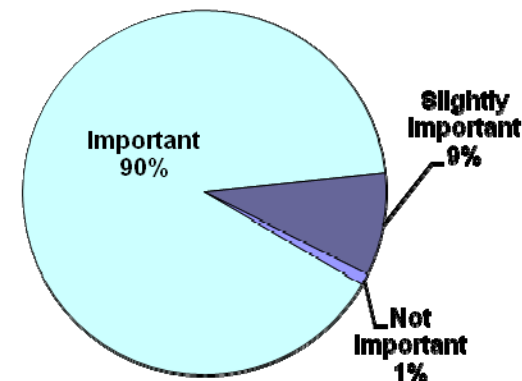
n=977

Do Electric & Gas Companies Have a Role
in Minimizing Impact of Global Climate Change?



n=955

Is this Role...?



Base=Believe Companies Have a Role; n=858

Greenhouse Gas Control is a Key Issue

- ◆ Nearly all respondents agree that utilities should take responsibility regarding greenhouse gases.

87% Agree:

Electric & gas companies should reduce the release of natural gas, a potent greenhouse gas, from their gas distribution and transmission systems.

n=848

88% Agree:

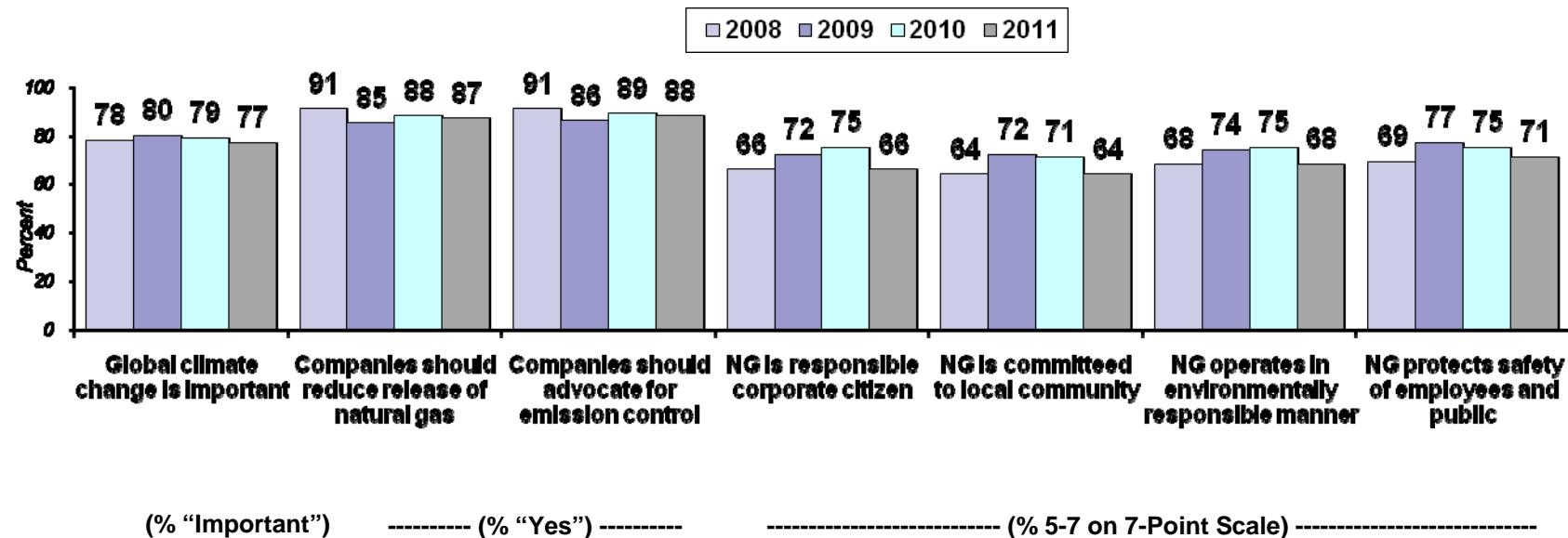
Electric & gas companies should advocate for the implementation of greenhouse gas emission control programs on a regional and national basis.

n=881

2011 Survey

Social Responsibility Aspects - Trended

- All social responsibility aspects decreased this year.
 - The largest decline (-9 points) concerns National Grid being a responsible corporate citizen.
 - The smallest decreases (only -1 point) are for reducing the release of natural gas and for advocating for emission control.



Differences Between Highly Satisfied vs. Less Satisfied Customers Regarding Social Responsibility Aspects

- Perceptions of National Grid regarding social responsibility differ substantially between customers who are highly satisfied overall and those who are less satisfied.
- The largest difference relates to National Grid's commitment to the local community: a gap of 33 points between those highly satisfied and those less satisfied.

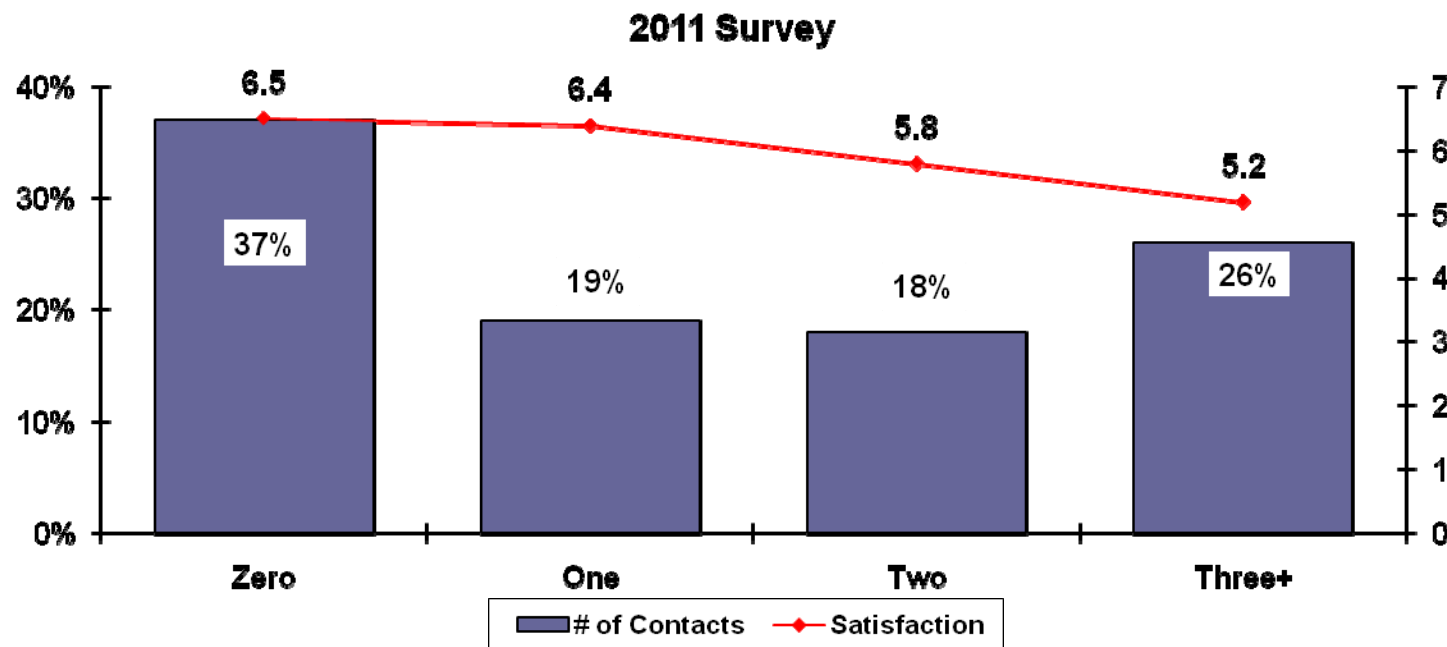
2011 Survey (20+ point differences circled)	Highly Satisfied <u>Overall</u> (% 6-7)	Less Satisfied <u>Overall</u> (% 1-5)	Percentage Point Difference
(Base)	(729)	(269)	
Being a responsible corporate citizen (% 5-7)	74%	45%	29
Commitment to the local community (% 5-7)	73	40	33
Operating in an environmentally responsible manner (% 5-7)	74	50	24
Protecting the safety of employees and the public (% 5-7)	78	54	24

Detailed Findings

4. Contact with National Grid

Overall Satisfaction Declines as the Number of Contacts Increases

- ◆ Nearly two in three NH customers (63%) have had some contact with National Grid (or attempted to contact National Grid) in the past 12 months.
- ◆ Those with no contact (mean 6.5) are much more satisfied than those who have had contact (mean 5.2-6.4), demonstrating that contacts correlate to satisfaction.



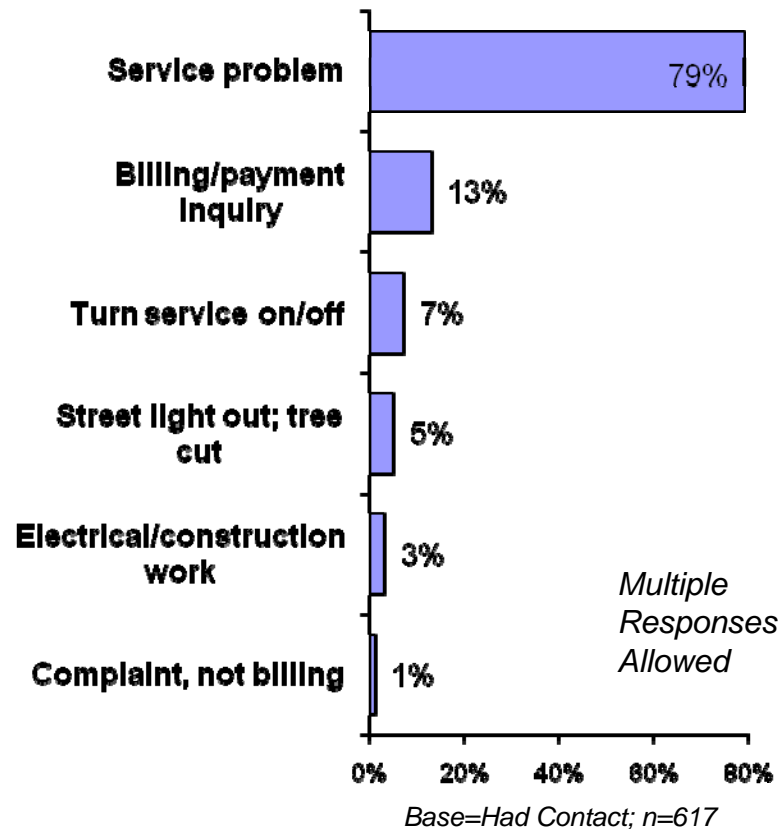
n=985

Most Customers Contacted the CCC for Service Problems

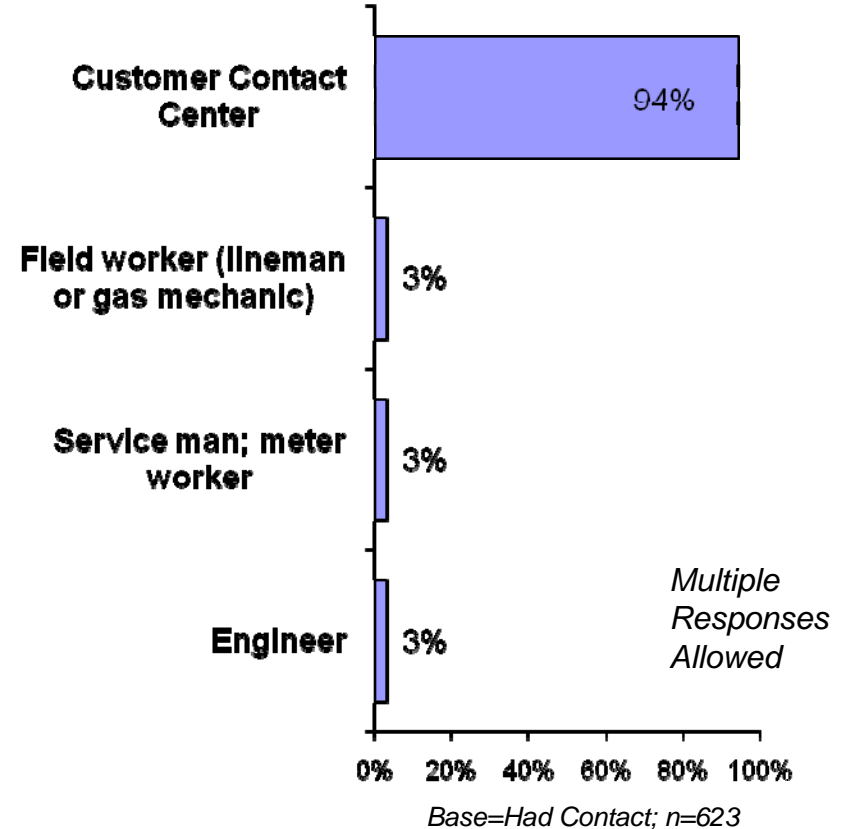
- A service problem is the most common reason to contact National Grid (79%) and the Customer Contact Center (phone center) is the place where most residents make contact (94%).

2011 Survey

Reasons for Contact



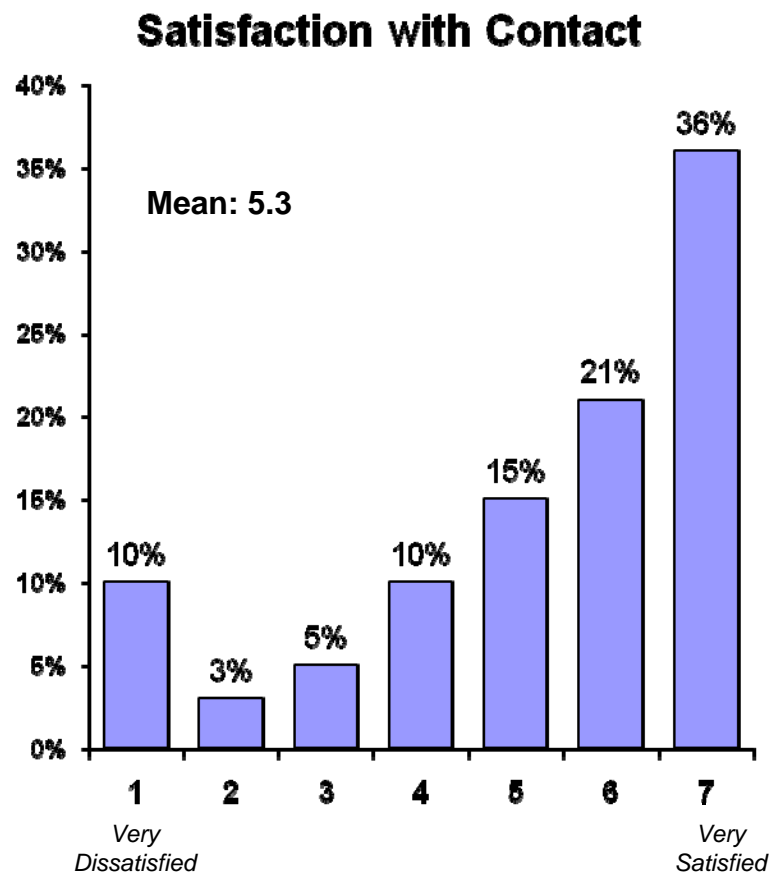
Where/Who Contacted



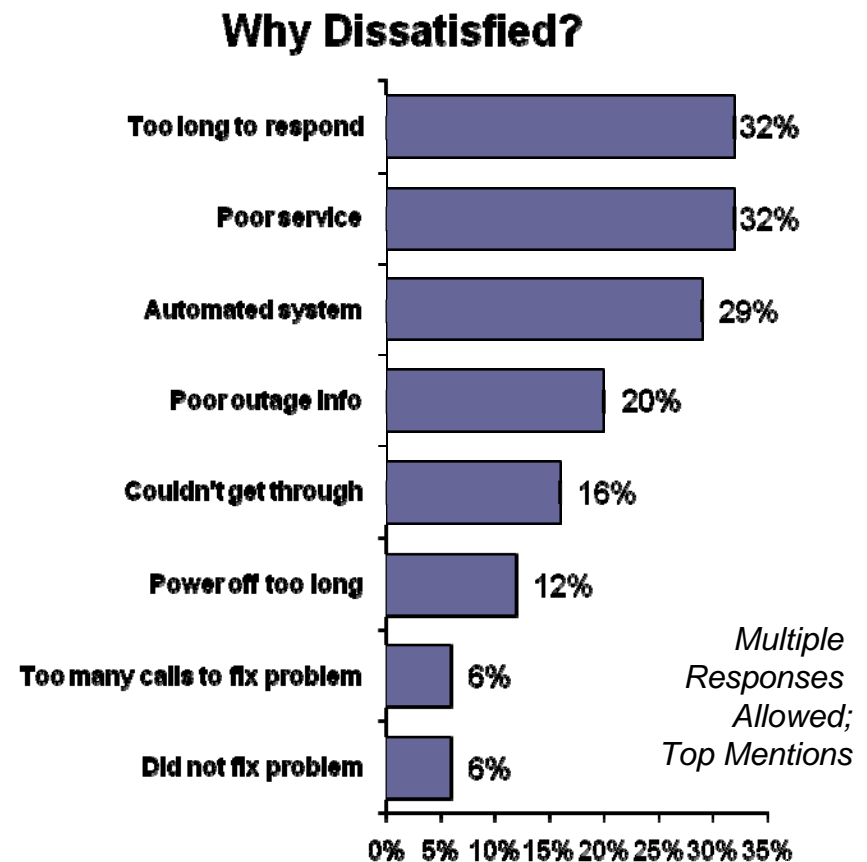
Service Levels Correlate to Satisfaction with Contact

- Most customers are satisfied with their most recent contact (57% rate 6-7); those who are not satisfied mention the length of time it took to obtain a response (32%) and generally poor service (32%) as issues.

2011 Survey



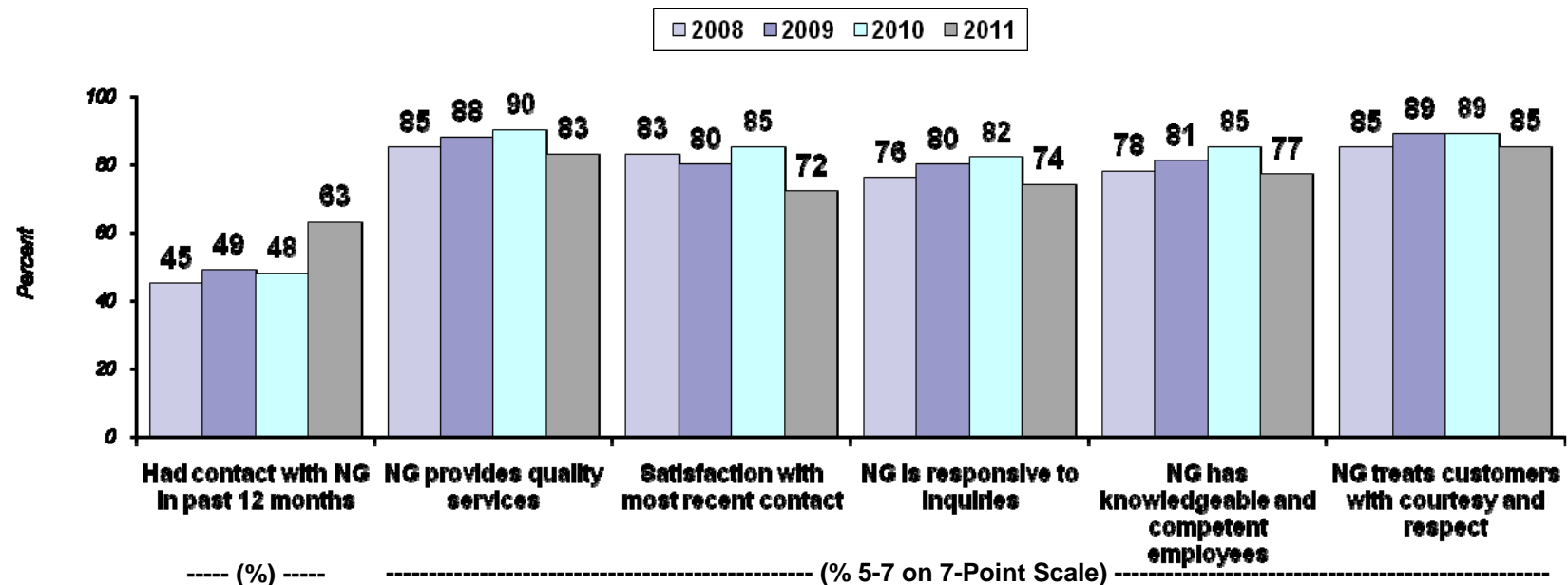
Base=Had Contact; n=607



Base=Had Contact and Sat=1-5; n=113

Contacts - Trended

- A much higher proportion of customers this year (63%) than last year (48%) had contact with National Grid.
- All the ratings related to contacts decreased this year; the largest drop is 13 points for satisfaction with most recent contact and the smallest drop (only 4 points) concerns treating customers with courtesy and respect.



Differences Between Highly Satisfied vs. Less Satisfied Customers Regarding Contacts

- Perceptions of National Grid in terms of providing good customer service have a major impact on overall satisfaction. Highly satisfied and less satisfied customers give very different ratings.
- The largest gaps are for providing quality service (42 point gap) and satisfaction with most recent contact (40 point gap)

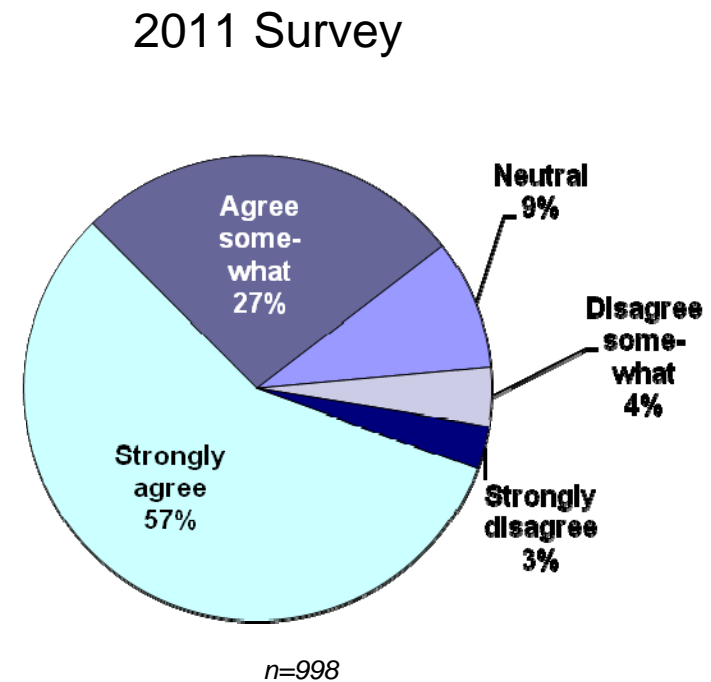
2011 Survey (20+ point differences circled)	Highly Satisfied Overall (% 6-7)	Less Satisfied Overall (% 1-5)	Percentage Point Difference
(Base)	(729)	(269)	
High satisfaction (% 5-7) with most recent contact	86%	46%	40
NG provides quality services to customers (% 5-7)	94	52	42
NG is responsive to your inquiries (% 5-7)	83	49	34
NG has knowledgeable and competent employees (% 5-7)	83	62	21
Contacted NG 3+ times in past 12 months	17	50	33
Contacted NG 0 times in past 12 months	44	17	27
Treat you with courtesy and respect (% 5-7)	90	73	17
Mean number of contacts in past 12 months	2.2	4.4	-

Detailed Findings

5. Reliability: Outages & Power Quality

National Grid Provides Reliable Service

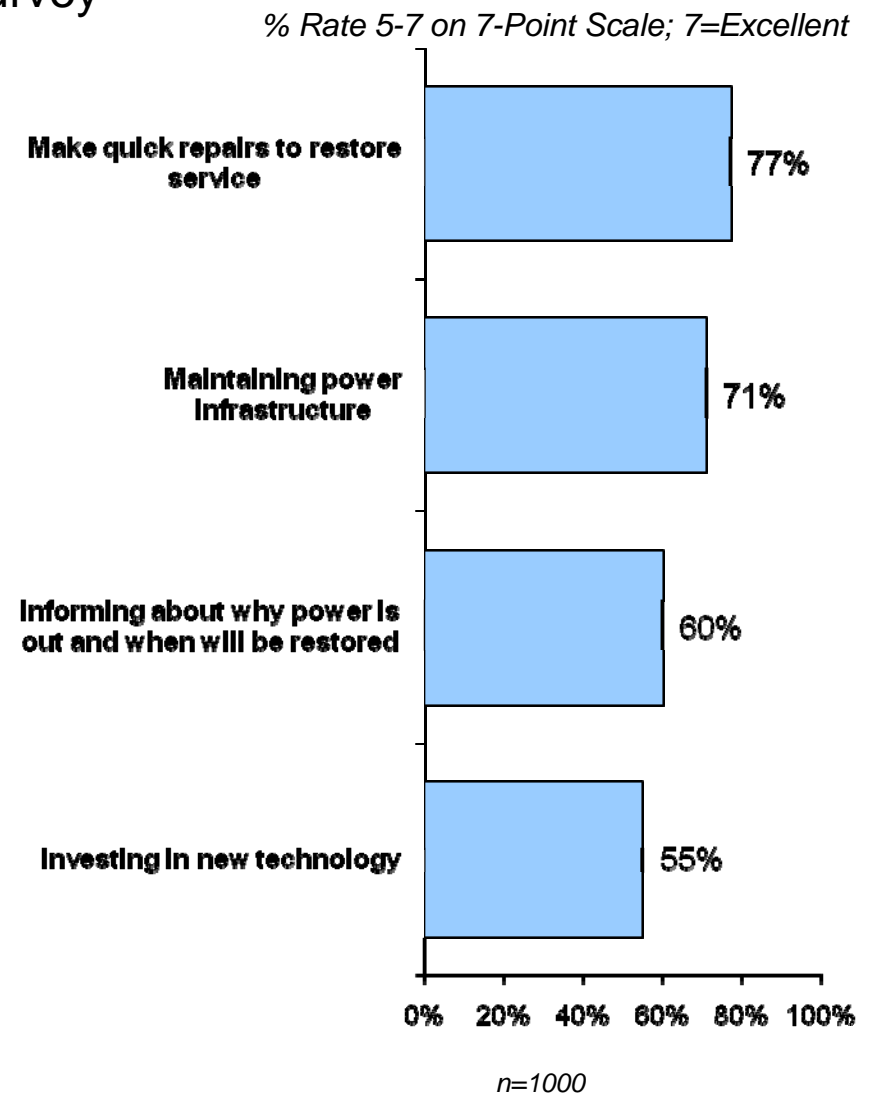
- Most customers agree (84% strongly + somewhat agree) that National Grid provides reliable electric service.



NH Residents Give National Grid High Marks on Making Quick Repairs

2011 Survey

- A majority of survey respondents give high ratings to National Grid's performance on all four reliability aspects.
- Lowest rated is the extent to which National Grid invests in new technology (55% rate 5-7).

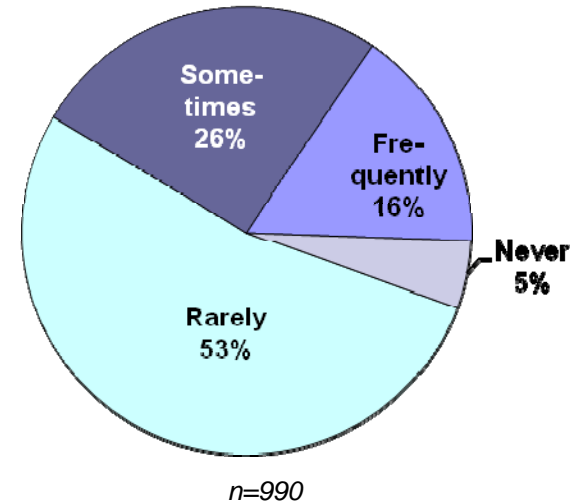


NH Residents Are Tolerant of More Outages Than They Experience

- Most residents have experienced few, if any, power outages.
- NH residents are tolerant of three outages per year.

2011 Survey

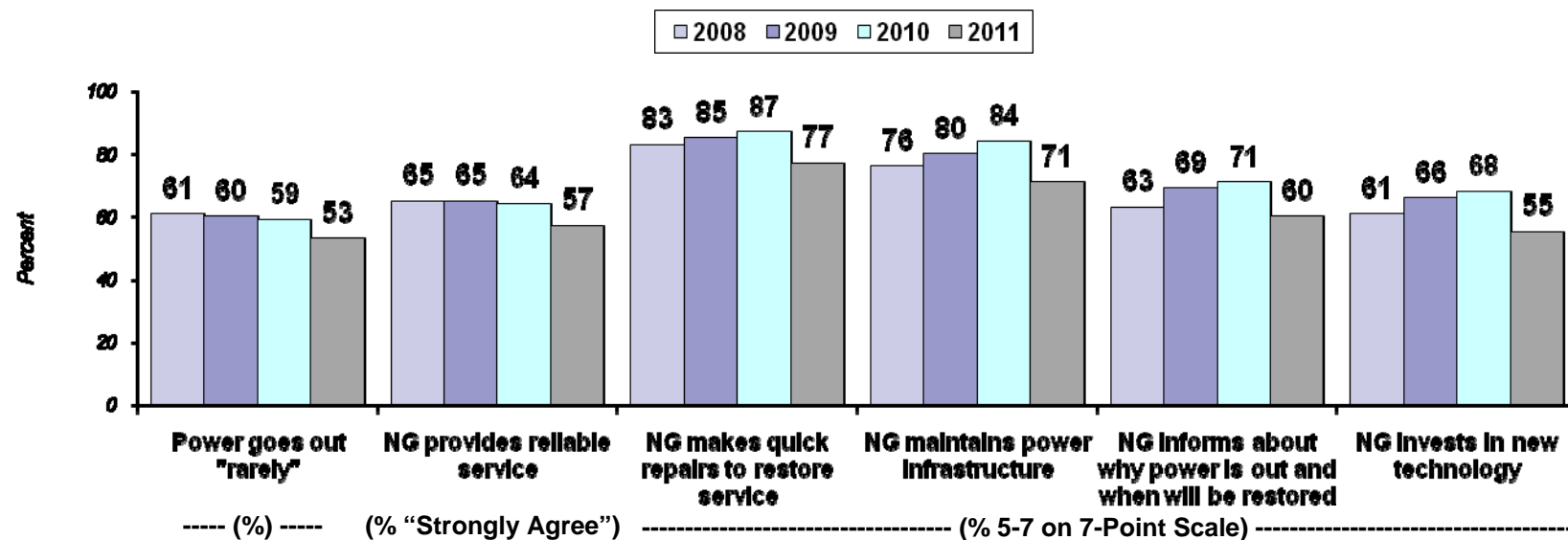
Power Goes Out...



An average of 3.0 outages are tolerable over a 12-month period

Reliability - Trended

- Trends regarding reliability were mostly positive for the past three years but all have decreased this year.
- The largest decreases relate to National Grid maintaining the power infrastructure (-13 points) and investing in new technology (-13 points).
- The smallest decrease is related to the power going out rarely (-6 points).



Differences Between Highly Satisfied vs. Less Satisfied Customers Regarding Reliability

- Highly satisfied customers are much more likely to give National Grid high ratings on all aspects of power reliability, particularly relating to service restoration and maintaining the power infrastructure.

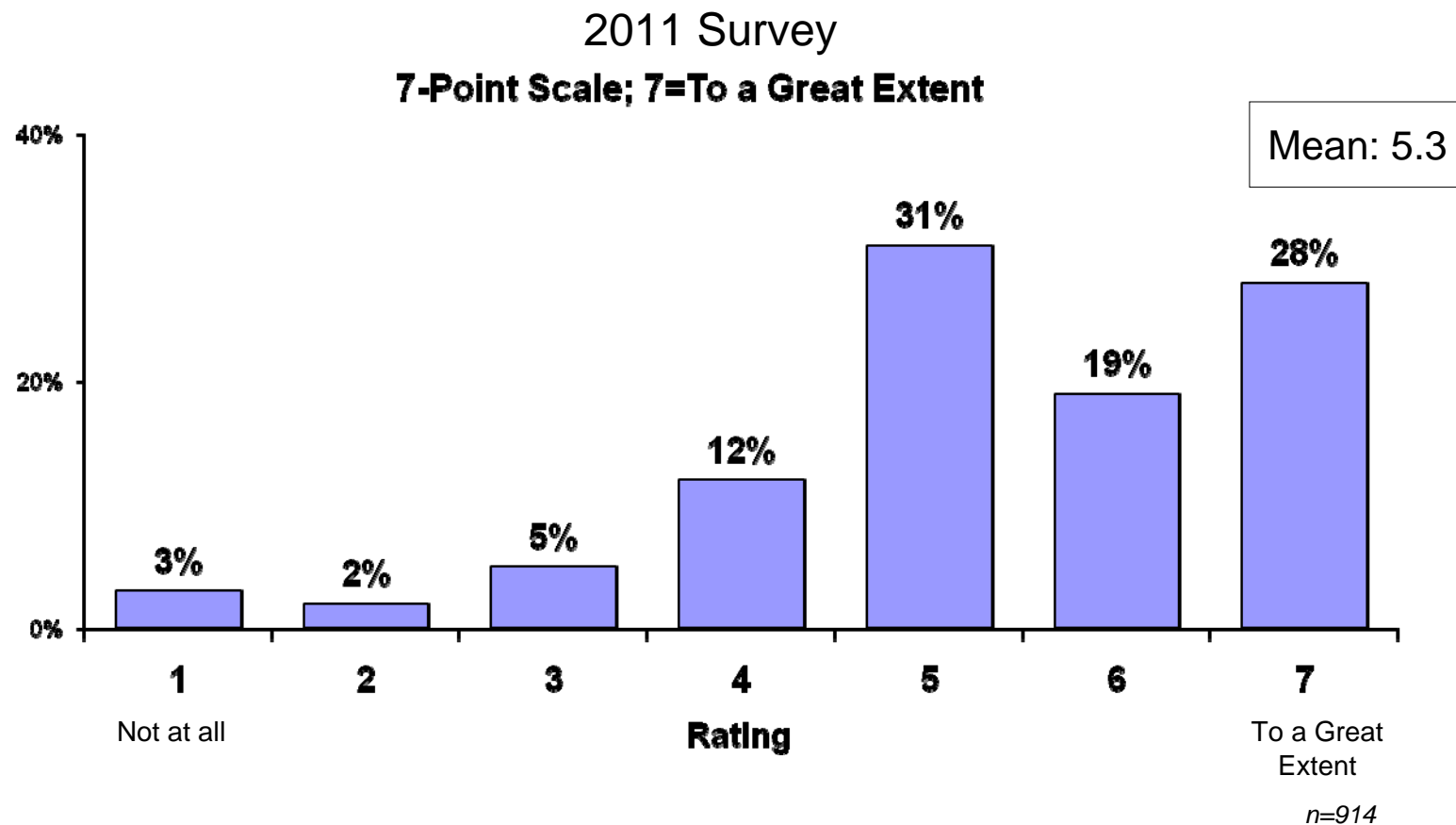
2011 Survey (20+ point differences circled)	Highly Satisfied <u>Overall</u> (% 6-7)	Less Satisfied <u>Overall</u> (% 1-5)	Percentage Point Difference
(Base)	(729)	(269)	
Strongly agree/agree that NG provides reliable service	70%	24%	46
NG adequately maintains power infrastructure (% 5-7)	82	38	44
Informs why power is out and when will be restored (% 5-7)	72	27	45
Cite "power outages" as reason for low satisfaction rating	8	53	45
NG makes quick repairs to restore service (% 5-7)	89	46	43
NG invests in new technology to ensure uninterrupted power (% 5-7)	64	27	37
Power goes out "rarely"	64	24	40
Power goes out "frequently"	7	38	31

Detailed Findings

6. Rates & Billing

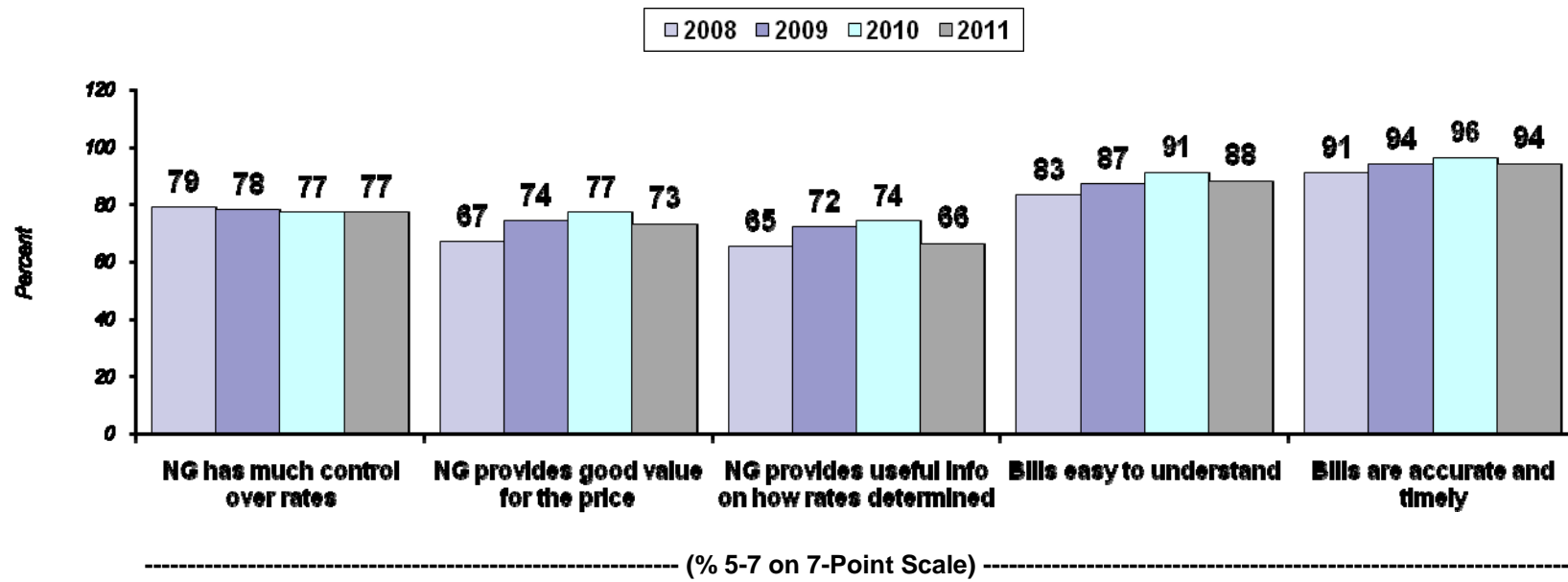
Perceptions are that National Grid has Some Control over Rates

- Three-fourths of NH residents (78%) believe that National Grid has a great deal of control over rates (rate 5-7).



Rates and Billing - Trended

- Positive three year trends were evident relative to most of the rates/billing aspects. However, that trend is now reversed.
- The largest year to year decrease (-8 points) relates to National Grid providing useful information on how rates are determined. The other declines are between two and four percentage points.
- The only aspect without a change this year is the perception of how much control National Grid has over rates (no change at 77%).



Differences between Highly Satisfied vs. Less Satisfied Customers Regarding Rates and Billing

- Perceptions of rates and billing aspects vary between highly satisfied and less satisfied NH residents. Perceptions about the value provided by National Grid and information on how rates are determined are key differentiating factors.

2011 Survey (20+ point differences circled)	Highly Satisfied <u>Overall</u> (% 6-7)	Less Satisfied <u>Overall</u> (% 1-5)	Percentage Point Difference
(Base)	(729)	(269)	
NG provides a good value for the price (% 5-7)	82%	46%	36
Useful info on how rates are determined (% 5-7)	74	45	29
Bills are easy to understand (% 5-7)	92	76	16
Cite "high rates" as reason for low satisfaction rating	4	12	8
Bills are accurate and timely (% 5-7)	96	87	9
Contacted for billing/payment inquiry	13	15	2
Believe that NG has control over rates (% 5-7)	80	71	9

Detailed Findings

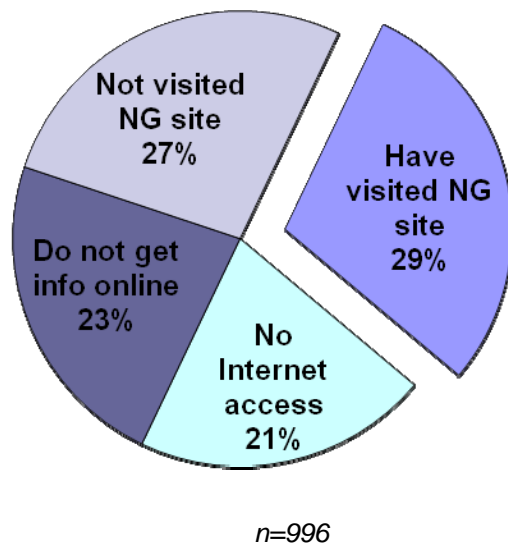
7. Internet

A Small Number of Customers Go to the Web Site to Pay a Bill

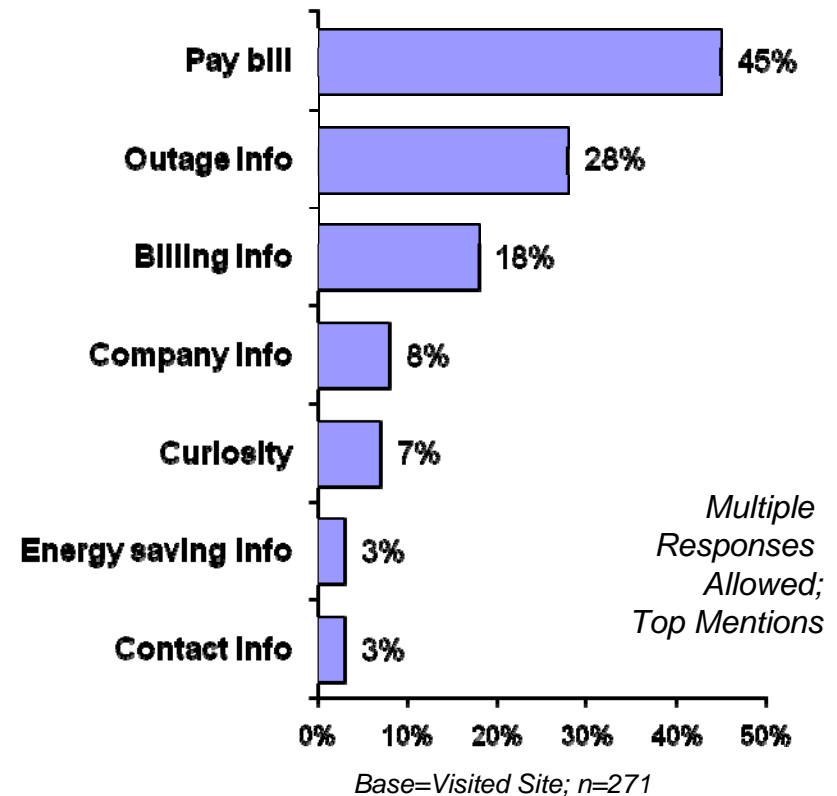
- Three in ten NH residents have visited the National Grid Web site (29%); most of these visitors went there to pay a bill (45%).

2011 Survey

Internet Use



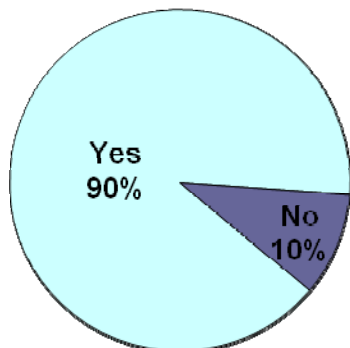
Why Visit Site?



The Web Site Provides a Satisfactory Experience for Most Visitors

- Most customers (90%) found what they were looking for at the National Grid Web site, and most consider the site useful (81% rate 5-7).
- Three in five (60%) say they would consider using the site to pay their bill.

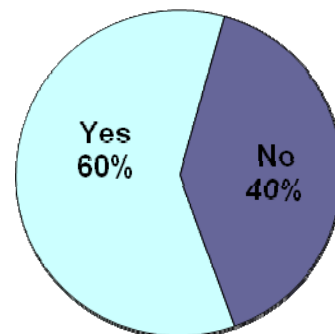
Find What Looking For?



Base=Visited Site; n=271

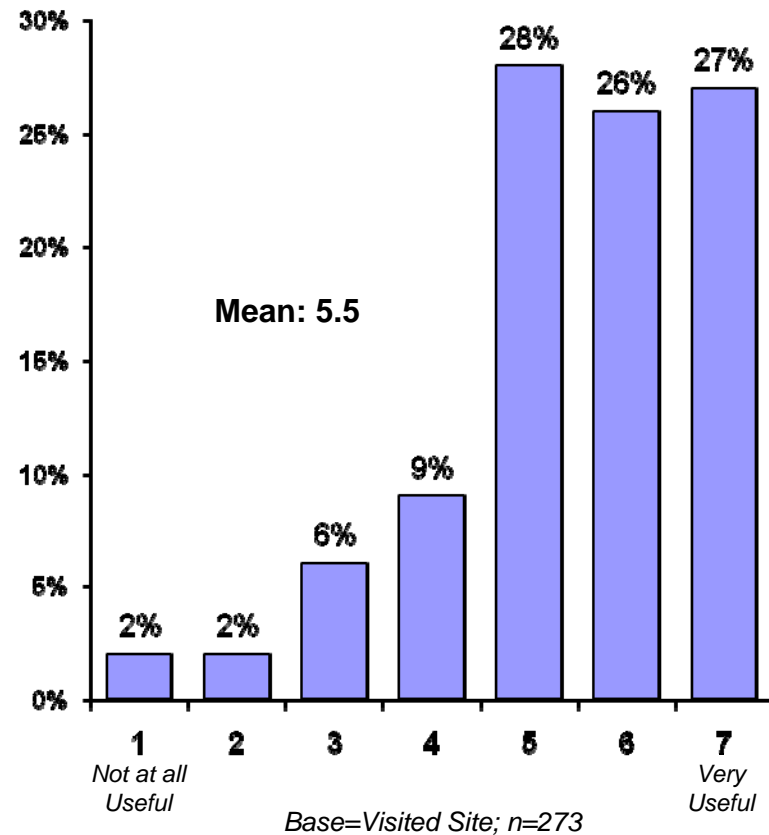
2011 Survey

Consider Paying Bill at Site?



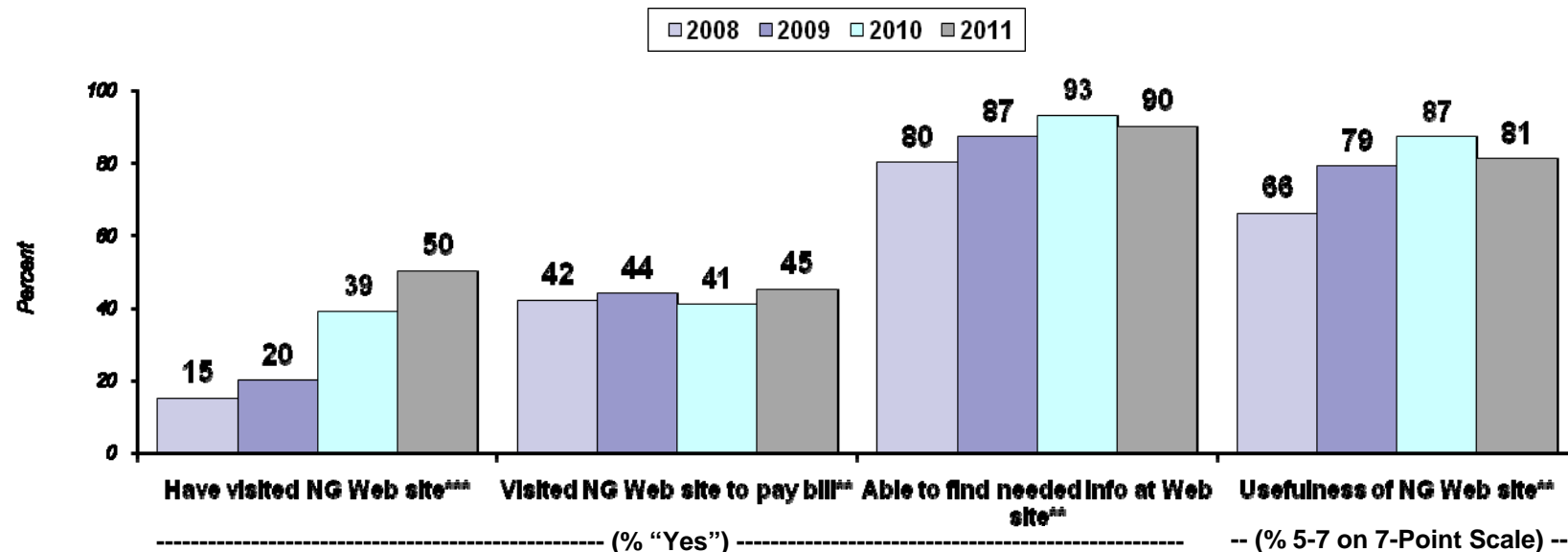
Base=Use Internet for Biz; n=546

Usefulness of Web Site



Internet - Trended

- Two Internet-related measurements have increased this year compared to last year and two decreased.
- More customers are visiting the site (+11 points) and are visiting to pay a bill (+4 points).
- Unfortunately, fewer visitors are finding the information they need (-3 points) and considerably fewer (-6 points) give the highest usefulness ratings for the site.



Base=Visited NG Web site *Base=Get info online

Differences Between Highly Satisfied vs. Less Satisfied Customers Regarding the Internet

- There are relatively small differences between highly satisfied and less satisfied customers regarding aspects of the NG Web site; most Internet-related aspects are not strong differentiators and therefore do not have a great deal of impact upon satisfaction.
- However, highly satisfied customers consider the National Grid Web site somewhat more useful (21 point gap) than less satisfied customers.

2011 Survey (20+ point differences circled)	Highly Satisfied Overall (% 6-7)	Less Satisfied Overall (% 1-5)	Percentage Point Difference
(Total Base)	(568)	(216)	
Overall usefulness of NG Web site (% 5-7)**	88%	67%	21
Visited Web site to pay a bill**	47	40	7
Visited NG Web site***	48	56	8
Have Internet access	79	83	4
Able to find needed information at the NG Web site**	95	80	15
Would use Web site to pay bill online**	61	59	2
Get information/do business online*	70	72	2

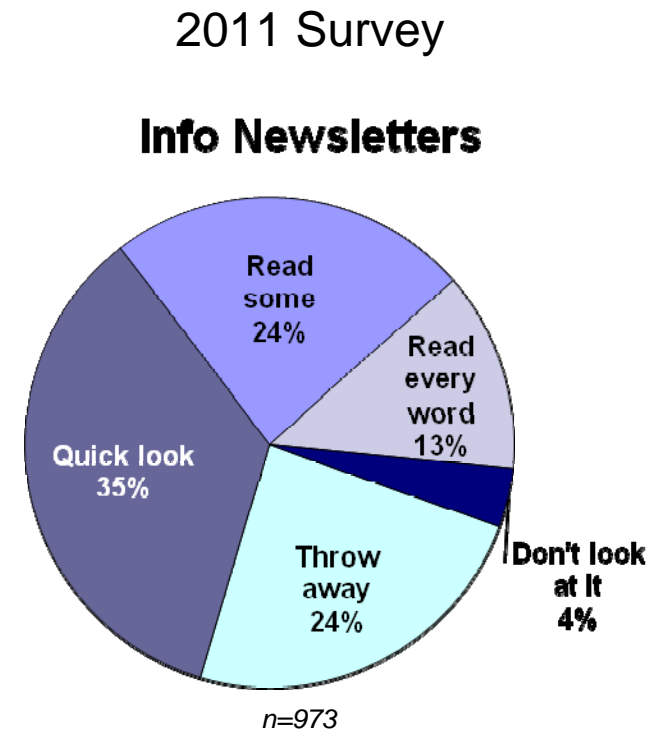
*Base=Have Internet access **Base=Visited NG Web site ***Base=Get info online

Detailed Findings

8. Communications with Customers

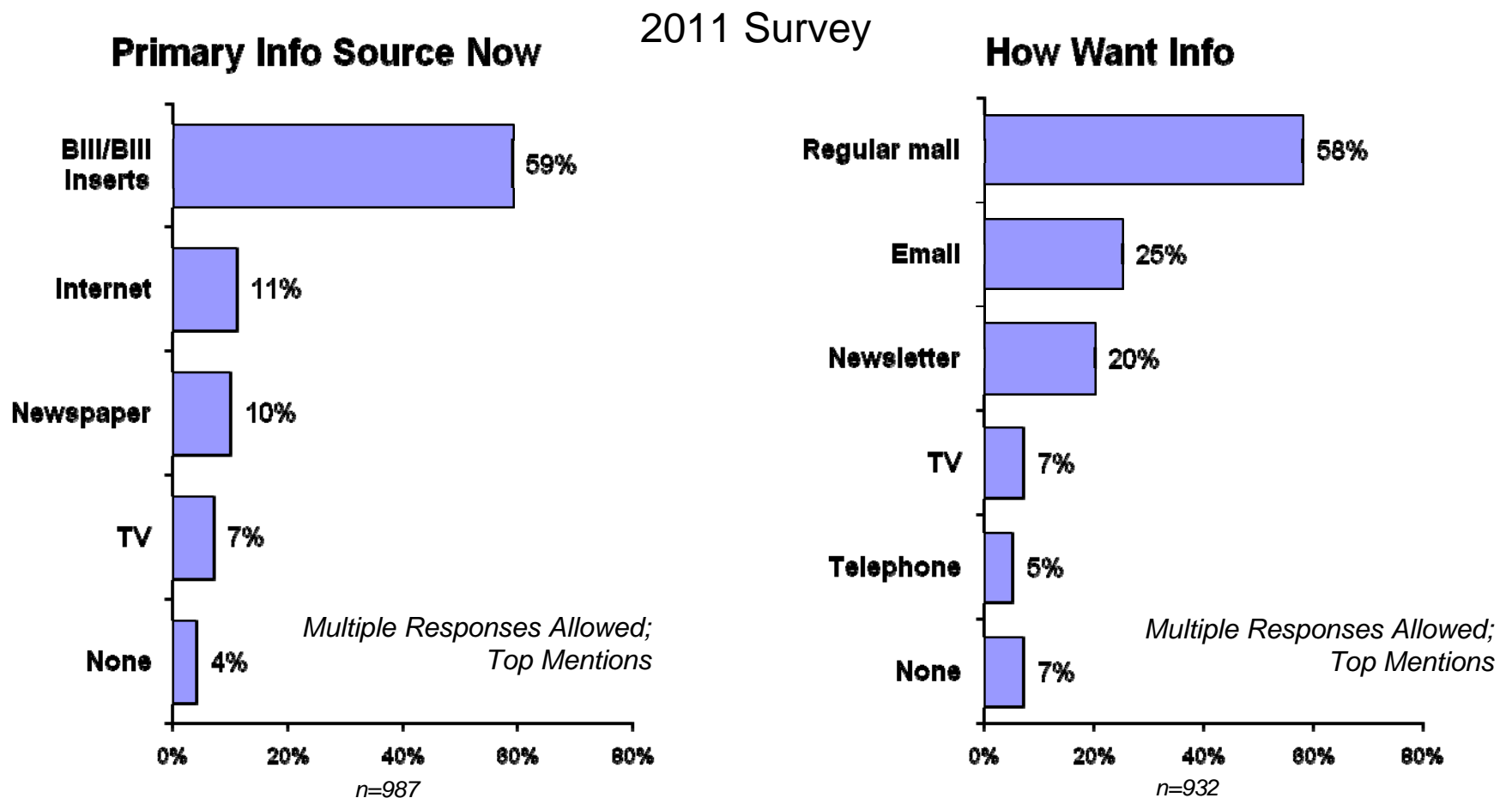
Most Residents Read Some Portion of the Newsletter

- Approximately one in three residents read the newsletter (37% read some + read every word) and another one in three take a quick look (35%).



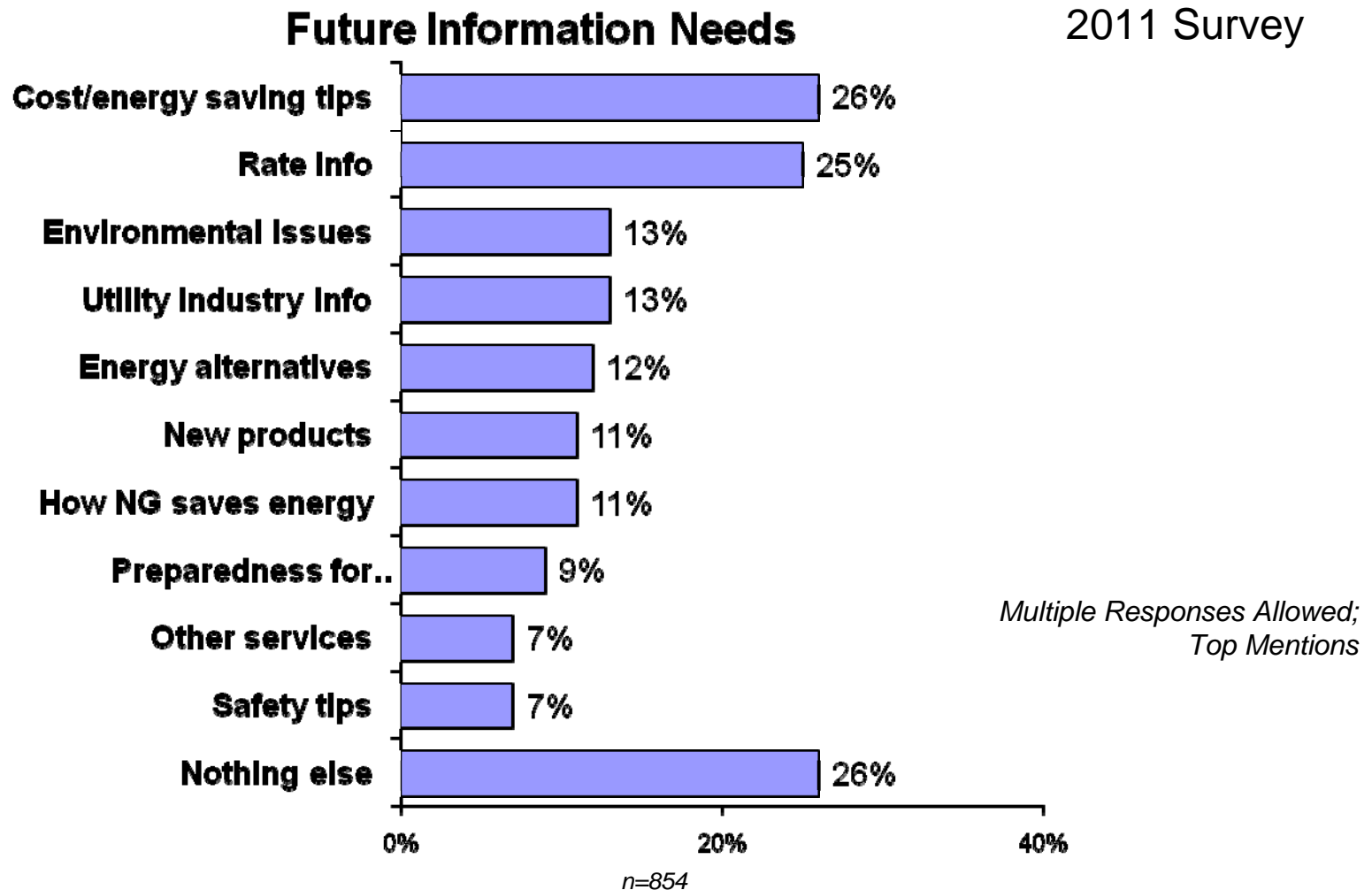
The Mail is the Preferred Method of Communication

- Most people currently look to their bill inserts for information (59%) and would like to continue receiving information through the mail (58%).



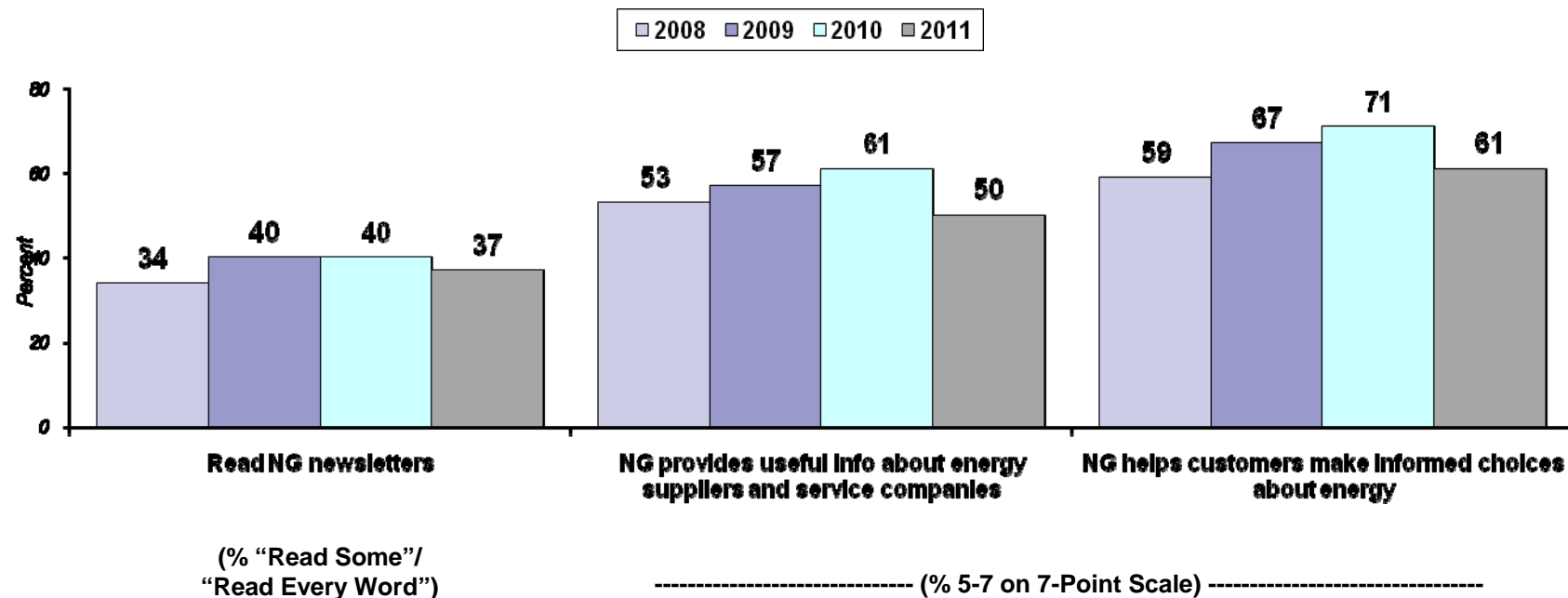
NH Residents Want More Cost Saving Tips and Rate Information

- NH residents want more info on cost/energy saving tips (26%) and rates (25%).



Communications - Trended

- All communication trends are negative compared to the 2010 survey: fewer customers are reading the newsletter (37%; -3 points); fewer are finding useful information about energy suppliers/service companies (50%; -11 points), and fewer believe the company is helping them to make more informed choices about energy (61%; -10 points).



Differences between Highly Satisfied vs. Less Satisfied Customers Regarding Communications

- There is considerable differentiation between the two satisfaction segments regarding the information communicated by National Grid.

2011 Survey (20+ point differences circled)	Highly Satisfied Overall (% 6-7)	Less Satisfied Overall (% 1-5)	Percentage Point Difference
(Base)	(729)	(269)	
NG helps you make informed choices regarding energy (% 5-7)	69%	39%	30
NG provides useful info about different energy suppliers and energy service companies (% 5-7)	56	33	23

Conclusions & Recommendations

Overall Satisfaction is High but has Dropped This Year, Concurrent with Changes in Perceptions

- Overall satisfaction is high in New Hampshire (48% very satisfied; highest rating of “7”) and although this proportion had improved each year from 2008 through 2010, satisfaction declined this year.
 - The proportion of NH residents giving the highest satisfaction rating (“7”) increased from 45% in 2007 to 58% in 2010. This year it dropped 10 points to 48%.
 - Similarly, top box ratings (% rate 5-7) rose from 89% in 2007 to 94% in 2010, but dropped five points to 89% currently.
- Satisfaction is driven by a lack of problems (52% of highly satisfied customers give this as a reason for their high rating).
 - Several also cite good service (31%) and reliability (no outages; 18%) as contributing to their satisfaction level.
 - Power outages are the leading reason for dissatisfaction (53%) followed by slow response time (20%).
- Perceptions of National Grid remain quite positive (77% say it is an excellent or good company). Yet, this is down from 83% last year.
 - After some improvements in ratings over the past two years, much smaller proportions of respondents this year describe National Grid as having vision for the future (56%, -11 points), as premier in the industry (62%, -9 points) and as a well-run company (70%, -8 points).
- ❖ Recent power outages due to two extreme weather occurrences experienced by New Hampshire residents are the likely reason for their lower satisfaction ratings this year. Intensify efforts to provide excellent service. Communicate positive results and service improvements in order to reposition National Grid among customers whose impressions of the utility may have been tarnished by recent and lengthy outage experiences.

Satisfaction with Interactions is Highly Impacted by Communications During Power Outages, Many of Which Occurred in Late 2011

- The number of contacts increased substantially in this year's survey with 63% of residents saying they contacted the utility, an increase of 15 percentage points over 2010; this increase is concurrent with recent severe weather which caused widespread power outages.
 - Issues such as outages prompt customers to contact National Grid. Although most customers agree that National Grid provides **reliable** electric service (84%), most contacts with National Grid in 2011 were for **service problems** (79%).
- Although interactions remain satisfactory for many (36% "very satisfied" with most recent contact), this measurement decreased by ten points compared to last year's survey (72% rate 5-7 compared to 85% in 2010).
 - **Taking too long to respond** (32%) and **poor service** in general (32%) cause dissatisfaction with the most recent contact for many NH customers. Others had problems with the **automated phone system** (29%), **poor outage information** (20%), and an **inability to get through** (16%).
 - The single differentiating variable that shows the widest discrepancy between highly satisfied and less satisfied customers in NH is (lack of) **information why power is out and when it will be restored** (45 point gap). The two other aspects with large differences between highly satisfied and less satisfied customers are: NG **adequately maintains the power infrastructure** (44 point gap) and NG **makes quick repairs to restore service** (43 point gap).
 - One of the lowest rated aspects in the 2011 survey is agreement that National Grid invests in new technology to **provide uninterrupted power** (55%).
- ❖ The number and extent of severe weather-related power outages in New Hampshire was historically extreme in 2011. More residents than ever before had a need to contact National Grid. Customers are reacting in the survey to their experiences, some of which were not satisfactory. It is important to maintain a high level of communications, including providing in-person assistance and updated restoration information, during emergencies. Continue to plan for extreme situations like that experienced in 2011 and implement changes that will provide more satisfactory communications for customers who contact National Grid.

Customers Want More Information and Want It Delivered with Their Bill

- Customers want more information on rates and energy alternatives.
 - Most of the NH residents surveyed continue to believe that National Grid **has control over rates** (77% in 2011 and 2010).
 - In addition, most believe that National Grid provides useful information about **how rates are determined** (66%), yet this proportion has decreased since the last survey (-8 points).
 - Only half of surveyed customers agree that National Grid provides **useful information** about energy suppliers and service companies (50%; -11 points). This is the lowest-rated variable in the survey this year.
 - Another relatively low rated attribute is that National Grid **helps customers make informed choices** about energy (61%).
 - One in four would like even **more information** about cost/energy saving tips (26%) and rates (25%).
- The primary source of information among NH residents is on the bill or on bill inserts (59%).
 - Far fewer turn to other sources such as the **Internet** (11%) or **newspapers** (10%).
 - Residents say they prefer to receive information through the **mail** (58%), rather than by email (25%) or through a newsletter (20%).
 - The National Grid **newsletters** are losing readership; only 37% read at least some of the newsletters and this has dropped from 2010 (-3 points).
- ❖ Provide more rate-related information to customers, particularly how rates are determined and information about suppliers and service companies. Conduct additional research to determine what else is important to customers that they would like to hear about from National Grid.
- ❖ Deliver information to customers along with their bill; do not rely on newsletters because readership is very low.

More Customers are Using the Web Site but are Finding it Less Useful and Negative Perceptions Remain About National Grid's Future

- Three in ten survey respondents have visited the National Grid Web site (29%, +9 points over 2010) but overall usefulness of the site is rated high by fewer residents this year (81%, -7 points). This proportion has decreased dramatically after two previous yearly improvements (+13 points in 2009, +9 points in 2010).
 - While almost all visitors say they were able to find the information they were looking for (90%), they were not visiting the site for information. Instead, the most common reason to visit the site was to pay a bill (45%).
- ❖ Continue to update and modify the Web site to ensure that all visitors are able to pay their bill quickly and easily. Consider conducting additional research (usability) to understand where customers encounter problems interacting with the site.
- Several of the lowest-rated variables in this year's survey are perceptions of National Grid:
 - Being premier in its industry (62%)
 - Commitment to the local community (64%)
 - Being a responsible corporate citizen (66%)
- ❖ Address perceptions of National Grid and the future of technology in communications with customers. Continue attempts to position National Grid as an energy leader and publicize community activities.

Appendix

~Summary Tables~

Differences Between Highly Satisfied vs. Less Satisfied Customers - 2011 Survey

2011 Survey Top 3 Box Ratings (% 5-7) (20+ point differences circled)	Highly Satisfied <u>Overall</u> (% 6-7 OA Sat)	Less Satisfied <u>Overall</u> (% 1-5 OA Sat)	Percentage Point Difference
Informs why power is out and when will be restored	72%	27%	45
NG adequately maintains power infrastructure	82	38	44
NG makes quick repairs to restore service	89	46	43
NG provides quality services to customers	94	52	42
High satisfaction with most recent contact	86	46	40
NG invests in new technology to ensure uninterrupted power	64	27	37
NG provides a good value for the price	82	46	36
Overall reputation	85	49	34
NG is responsive to your inquiries	83	49	34
Commitment to the local community	73	40	33
Being premier in its industry	71	40	31
Being a well run company	78	47	31
NG helps you make informed choices regarding energy	69	39	30
Useful info on how rates are determined	74	45	29
Being a responsible corporate citizen	74	45	29
Operating in an environmentally responsible manner	74	50	24
Protecting the safety of employees and the public	78	54	24
Vision for the future	62	39	23
NG provides useful info about different energy suppliers	56	33	23
Overall usefulness of NG Web site	88	67	21
NG has knowledgeable and competent employees	83	62	21
Treat you with courtesy and respect	90	73	17
Bills are easy to understand	92	76	16
Believe that NG has control over rates	80	71	9
Bills are accurate and timely	96	87	9

Trended Differences

Top 3 Box Ratings (% 5-7)	2009 Survey	2010 Survey	Percentage Point Difference (2009-2010)	2011 Survey	Percentage Point Difference (2010-2011)
Believe that NG has control over rates	78%	77%	-1	77%	0
Bills are accurate and timely	94	96	2	94	-2
Bills are easy to understand	87	91	4	88	-3
NG provides a good value for the price	74	77	3	73	-4
Protecting the safety of employees and the public	77	75	-2	71	-4
Treat you with courtesy and respect	89	89	0	85	-4
NG is responsive to your inquiries	80	82	2	74	-6
Overall reputation (good + excellent)	80	84	4	77	-7
NG provides quality services to customers	88	90	2	83	-7
Commitment to the local community	72	71	-1	64	-7
Operating in an environmentally responsible manner	74	75	1	68	-7
NG has knowledgeable and competent employees	81	85	4	77	-8
Useful info on how rates are determined	72	74	2	66	-8
Being a well run company	77	78	1	70	-8
Overall usefulness of NG Web site	79	88	9	81	-9
Being a responsible corporate citizen	72	75	3	66	-9
Vision for the future	67	67	0	56	-9
Being premier in its industry	71	71	0	62	-9
NG helps you make informed choices regarding energy	67	71	4	61	-10
NG makes quick repairs to restore service	85	87	2	77	-10
NG provides useful info about different energy suppliers	57	61	4	50	-11
Informs why power is out and when will be restored	69	71	2	60	-11
High satisfaction with most recent contact	80	85	5	72	-13
NG adequately maintains power infrastructure	80	84	4	71	-13
NG invests in new technology to ensure uninterrupted power	66	68	2	55	-13