
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) <i>(20+ point differences circled)</i>	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