

National Grid

2007 Residential Customer
Satisfaction Study – New Hampshire
January 2008

Colwell & Salmon Communications, Inc.

Project Objectives

- ◆ Evaluate current levels of satisfaction with National Grid
 - ◆ Segment satisfaction levels by company, region/district, and division

- ◆ Compare trends in Residential customer satisfaction over time (back to 2003 where available)

- ◆ Assess customer perceptions regarding:
 - ◆ Awareness of National Grid name
 - ◆ Overall satisfaction
 - ◆ Perceptions of National Grid
 - ◆ Contact with National Grid
 - ◆ The National Grid Web site
 - ◆ Pricing and billing
 - ◆ Power outages

Background & Methodology

- ◆ This study has been conducted annually since 1997 for New England and since 2003 for New York. Although some changes have been made over time, basic satisfaction questions remain unchanged and are shown longitudinally in this report.

- ◆ Colwell & Salmon Communications, Inc. conducted a telephone survey among residential customers from November 27, 2007 to January 21, 2008. The total number of completed surveys in each region are:
 - ◆ 2,940 New England
 - ◆ 1,400 New York

- ◆ Residential customers were randomly selected for participation in the survey. The survey sample is representative of the National Grid residential customer base in New England and New York.

- ◆ Base counts throughout 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.

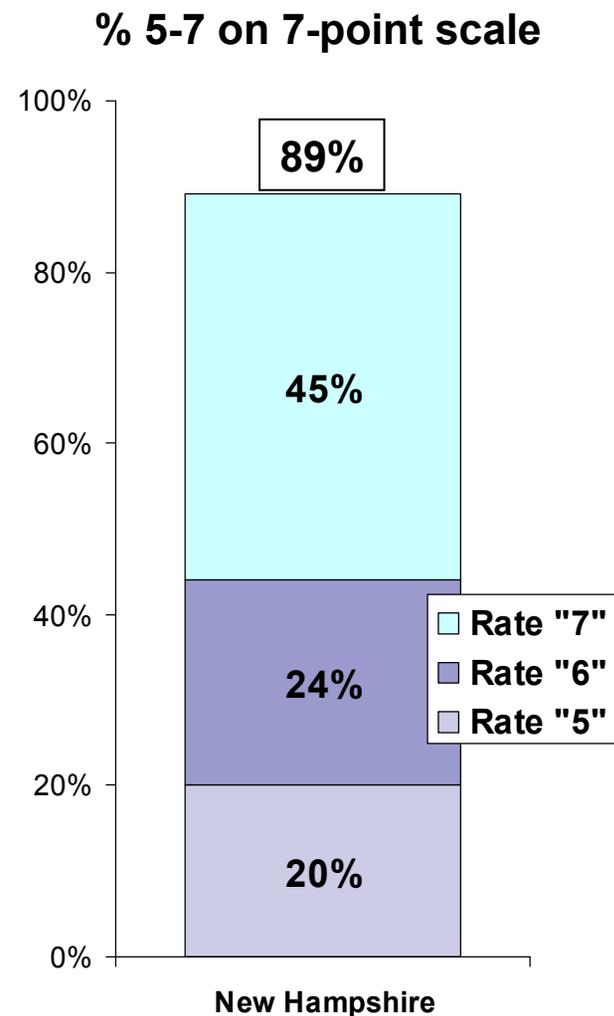
Residential Methodology - Sampling Error - 2007 Survey

- 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. The table below shows sample sizes and corresponding ranges of error (at a 90% level of confidence) for each segment included in this analysis.

	<u># of Resp</u>	<u>Range of Error (+/- ppts)</u>		<u># of Resp</u>	<u>Range of Error (+/- ppts)</u>
Total Sample	4340	1.1			
New Engl Companies Overall	2940	1.4	New York Companies Overall	1400	2.1
MA	1201	2.3	Frontier	200	5.8
Central	201	5.8	Western	200	5.8
Southeast	200	5.8	Central	200	5.8
South Shore	200	5.8	Mohawk Valley	200	5.8
Western	200	5.8	Northern	200	5.8
North Shore	200	5.8	N'east	200	5.8
Merrimack Valley	200	5.8	Capital	200	5.8
RI	401	4.1			
Capital	201	5.8			
Coastal	200	5.8			
NH	1143	2.4			
Nantucket	195	5.9			

Overall Satisfaction with National Grid by Company - 2007 NEW HAMPSHIRE

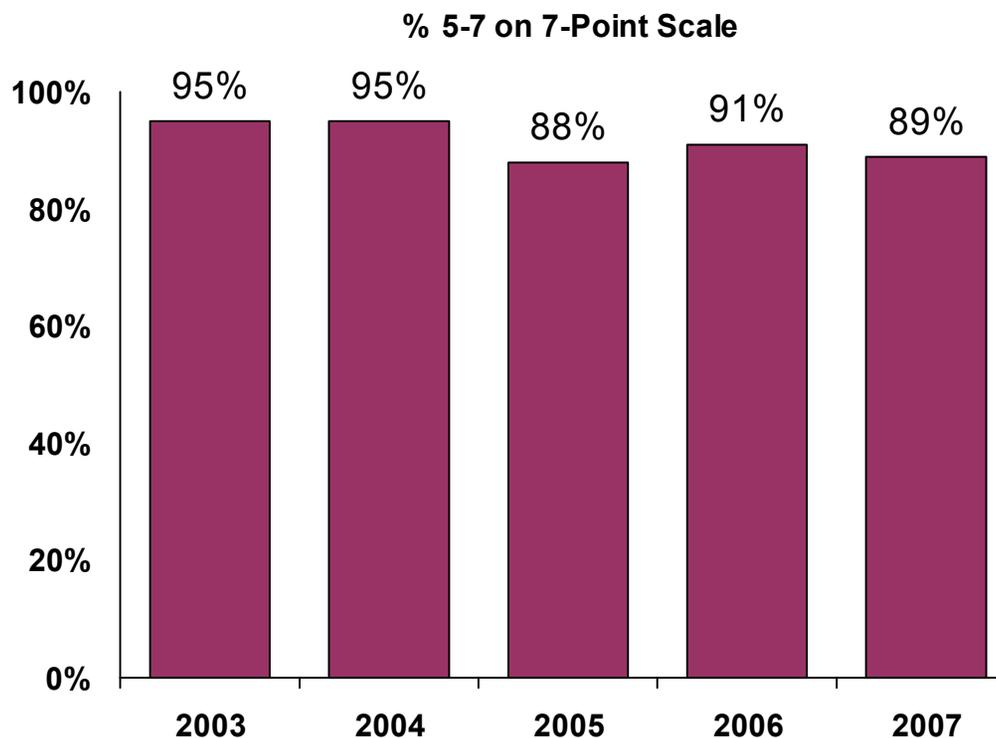
- Overall satisfaction with national Grid is very high among NH residents. Nearly all (89%) give high ratings (5-7) with almost half (45%) giving the highest rating of all ("7").



2007 Base: New Hampshire=1134

Overall Satisfaction with National Grid by Company - Trended NEW HAMPSHIRE

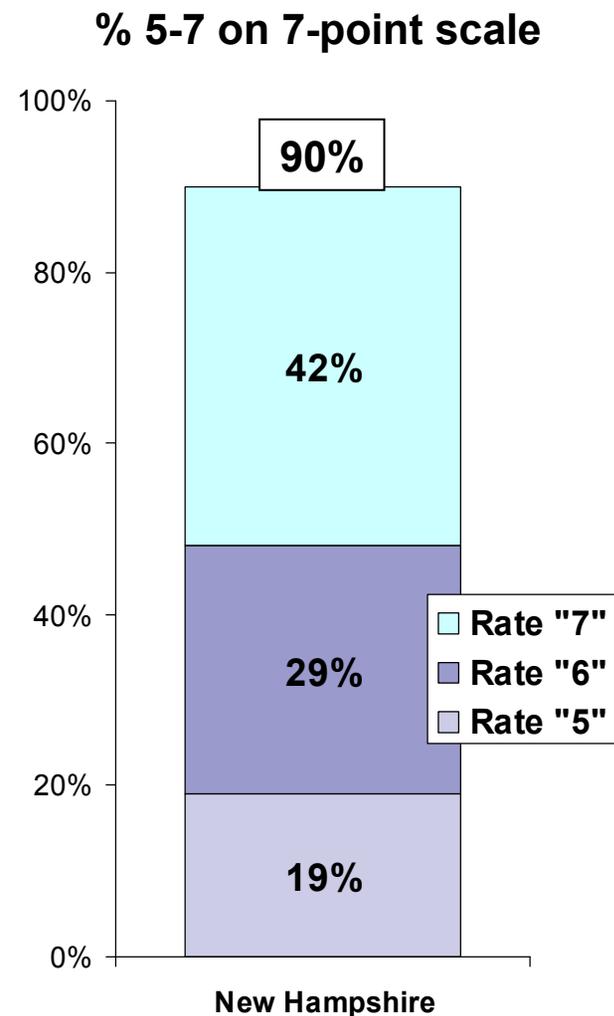
- Overall satisfaction for NH residents is very high. Almost nine in ten customers (89%) give the highest satisfaction ratings (5-7).
- However, overall satisfaction declined slightly in 2007 for NH customers.



2007 Base: NH=1134

Satisfaction Excluding Price by Company - 2007 NEW HAMPSHIRE

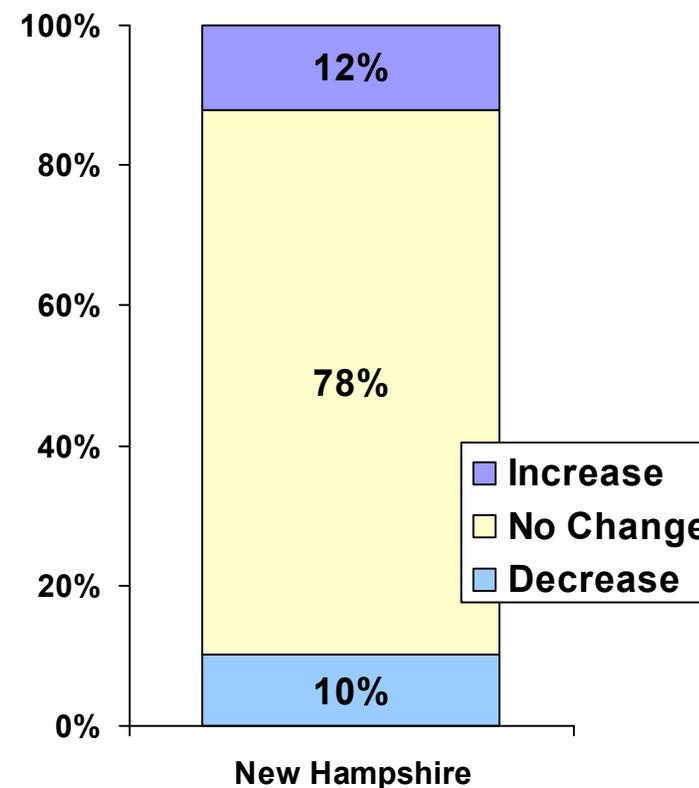
- Overall satisfaction, excluding price, was measured for the first time in the 2007 survey.
- A strong majority of NH residents are highly satisfied (90%).
- Many give a rating of "7" (42%).



2007 Base: New Hampshire=1125

Satisfaction Increased Over Past Year by Company - 2007 NEW HAMPSHIRE

- When asked how their level of satisfaction changed over the past year, the largest number of NH residents say they experienced no change in their level of satisfaction (78%).
- Slightly more say they experienced an increase (12%) than a decrease (10%) in overall satisfaction with National Grid.



2007 Base: NH=1075