

nationalgrid

January 24, 2006

Honorable Jaclyn A. Brillling
Secretary
New York State Public Service Commission
Three Empire Plaza
Albany, New York 12223-1350

RE: Case 99-G-0336 – Niagara Mohawk Power Company d/b/a National Grid – Gas Rates and Restructuring – Compliance Filing

Dear Secretary Brillling:

National Grid is transmitting the enclosed research report for the tracking survey on customer awareness and understanding of gas competitive opportunities that is referred to in Section V.E.6. of the Gas Settlement Agreement. This research was conducted in October 2005 by Opinion Dynamics Corporation. Opinion Dynamics interviewed 809 residential customers and 751 commercial customers, a total of 1,560 interviews. This sample size meets the requirements for statistical significance outlined in the Settlement Agreement.

The 2005 combined awareness index is 75.9%, compared to the 2004 index of 79.4% and the 2000 baseline index of 53.6%. This is a 3.5 percentage point decrease from the 2004 results, but still represents a 22.3 percentage point increase over the 2000 baseline.

The 2005 combined understanding index is 49.6%, compared to the 2004 index of 59.8% and the 2000 baseline index of 27.5%. This is a 10.2 percentage point decline from 2004, but represents a 22.1 percentage point increase over the 2000 baseline.

The following attachments are also enclosed:

- Attachment 1: Active Parties List-Case 99-G-0336 & Case 01-M-0075
- Attachment 2a: Residential Questionnaire
- Attachment 2b: Commercial Questionnaire
- Attachment 3: Detailed Findings Report
- Attachment 4: Tables showing the calculation of the residential and commercial customer awareness index, the residential and commercial understanding index, and the incentive factors by rate year

Data files (4) in Excel format (two raw data files, one file of Residential customer "verbatim" comments and one file of Commercial customer "verbatim" comments) will be electronically served on Active Parties List in Case 99-G-0336 & Case 01-M-0075

National Grid is confident that this survey provides a fair and accurate measurement of the current level of customer awareness and understanding of gas competitive opportunities. If you have any questions about the survey findings or the data please feel free to contact me at 315-428-6882.

Sincerely,



Arthur W. Hamlin
Director, Program & Policy Administration
Attachments

RECEIVED
PUBLIC SERVICE
COMMISSION
EXEC-FILES-ALBANY

2006 JAN 26 PM 2:00

Reports
99-G-0336
G+W
OGC
OHADR

300 Erie Blvd
Syracuse, NY 13202
315-428-6882

Xc: Signatory parties in Case 99-G-0336 (modified for known changes)

Joseph T. Ash – National Grid
Michael Kelleher – National Grid
Denise Gerbsch – PSC
Robert Visalli – PSC
Lyle VanVranken - PSC
Julie Niedzialkowski – PSC
Ronald Cerniglia – PSC
Rose Hamm – PSC
William Mills – PSC
Robert Hoaglund – National Grid
Carlos Gavilondo - National Grid
Lee Klosowski - National Grid
Kathleen Yetman – National Grid
Michelle Baker – National Grid
Donna Mimas – National Grid

**CASE 99-G-0336 - Petition of Niagara Mohawk Power Corporation
for Approval of a Gas Multi-Year Rate and
Restructuring Proposal.**

**ACTIVE PARTY LIST
NIAGARA MOHAWK POWER CORPORATION
CASE 99-G-0336**

**(As of September 18, 2000)
(Modified for known changes)**

JANE C. ASSAF, ESQ.
NEW YORK STATE DEPARTMENT
OF PUBLIC SERVICE
3 Empire State Plaza
Albany, NY 12223-1350
Tel: (518) 474-4535
Fax: (518) 486-5710
E-Mail: jca@dps.state.ny.us

PAUL AGRESTA, ESQ.
NEW YORK STATE DEPARTMENT
OF PUBLIC SERVICE
3 Empire State Plaza
Albany, NY 12223-1350
Tel: (518) 486-2653
Fax: (518) 473-7081
E-Mail: pya@dps.state.ny.us

TIMOTHY P. SHEEHAN
ADAMS, DAYTER & SHEEHAN, LLP
39 North Pearl Street
Albany, New York 12207
Tel: (518) 463-3385
Fax: (518) 463-3440
E-mail: tsheehan@msn.com
**(for Niagara Mohawk Power
Corporation)**

FRANK J. MILLER
~~**HUBER LAWRENCE & ABELL**~~
~~605 Third Avenue~~
~~New York, NY 10021~~
Tel: (212) ~~682-6200~~ 424-8164
Fax: (212) ~~661-5759~~ 649-0460
E-Mail: fmill@huberlaw.com
**(For New York State
Electric & Gas)**

Le BocuF, Lamb, Grace & MacPae LLP
125 West 55th Street
New York, NY 10019-5389

FMiller@LLgm.com

MICHAEL B. MAGER, ESQ.
ROBERT M. LOUGHNEY, ESQ.
COUCH WHITE, LLP
540 Broadway, P.O. Box 22222
Albany, NY 12201-2222
Tel: (518) 426-4600
Fax: (518) 426-0376
E-Mail: mmager@couchwhite.com
(For Multiple Intervenors)

ROBERT J. HOBDAV
MANAGING DIRECTOR, OPERATIONS
ENERGETIX, INC.
755 Brooks Avenue
Rochester, NY 14619
Tel: (716) 724-8743
Fax: (716) 724-8241
E-Mail: rhobday@energetix.net

MARK O. MARINI, MANAGER
REGULATORY AFFAIRS
ROCHESTER GAS AND ELECTRIC
CORPORATION
89 East Avenue
Rochester, NY 14649
Tel: (716) 771-4692
Fax: (716) 724-8818
E-Mail: Mark_Marini@rge.com

STANLEY W. WIDGER, JR.
NIXON, HARGRAVE, DEVANS
& DOYLE LLP
Clinton Square
P.O. Box 1051
Rochester, NY 14603-1529
Tel: (716) 263-1529
Fax: (716) 263-1600
E-Mail: swidger@nhdd.com
**(For Rochester Gas and
Electric Corporation)**

BILL MALCOLM, MANAGER
STATE REGULATORY RELATIONS
ANR PIPELINE COMPANY
 500 Renaissance Center
 Detroit, MI 48243
 Tel: (313) 496-5117
 Fax: (313) 496-5046
 E-Mail:
 bill.malcolm@coastalcorp.com

GORDON PENNINGTON, ESQ.
ANR PIPELINE COMPANY
 2000 M Street, N.W.
 Suite 300
 Washington, DC 20036
 Tel: (202) 331-4615
 Fax: (202) 331-4617

MICHAEL W. REVILLE
NATIONAL FUEL GAS
DISTRIBUTION CORP.
 10 Lafayette Square, 17th Fl.
 Buffalo, NY 14203
 Tel: (716) 857-7313
 Fax: (716) 857-7687
 E-Mail: RevilleM@NatFuel.com

THOMAS F. WITHKA
VICE PRESIDENT NATURAL GAS/
INTEGRATED ENERGY MARKETING
BRIAN HABACIVCH
MANAGER NATURAL GAS/
INTEGRATED ENERGY MARKETING
SPRAGUE ENERGY CORP.
 Two International Dr., Ste. 2
 Portsmouth, NH 03801-6809
 Tel: (603) 431-1000
 Fax: (603) 430-5320
 E-Mail:
 tfwithka@spragueenergy.com
 brianh@spragueenergy.com

SUSAN W. GINSBERG
DIRECTOR, REGULATORY AFFAIRS
ENGAGE ENERGY US, L.P.
 2000 M Street, NW, Ste. 300
 Washington, DC 20036
 Tel: (202) 331-4665
 Fax: (202) 331-4673
 E-Mail:
 susan.ginsberg@coastalcorp.com

GINGER RICHMAN
ASSISTANT VICE PRESIDENT
ENGAGE ENERGY US, L.P.
 500 Greenway Plaza
 Houston, TX 77046-0995
 Tel: (713) 877-3534
 Fax: (713) 297-1956
 E-Mail: ginger.richman@
 engageenergy.com

JO-ANNE RAFFA
NYSEG SOLUTIONS, INC.
 2 Court Street
 Binghamton, NY 13901
 Tel: (607) 721-1712
 Fax: (607) 721-1719
 E-Mail: jraffa@nge.com

USHER FOGEL
~~ROLAND, FOGEL, KOBLENZ &~~
~~PETROCCIONE, LLP~~
~~1 Columbia Place~~
~~Albany, NY 12207~~
 Tel: (518) 434-8112
 Fax: (518) 434-3232
 E-mail: ufogel@aol.com
 (For Agway Energy Services,
 Inc.)

*Small Customer
 Marketer Coalition
 557 Central Avenue
 Cedarhurst, NY
 11516*

DAVID L. PRESTEMON, ESQ.
NAEC, INC.
 126 N. Salina Street
 Suite 400
 Syracuse, NY 13202
 Tel: (315) 234-5340
 Fax: (315) 423-0964
 E-Mail: dprestemon@
 naecyork.com

SUE MONTGOMERY COREY
ENERGY ADVOCATE
NYS COMMUNITY ACTION ASSOC.
 754 Fourth Avenue
 Troy, NY 12182
 Tel: (518) 238-1955
 Fax: (518) 238-1839

EDWIN R. FRANK, PRESIDENT
EFFECTIVE TECHNOLOGIES, INC.
P.O. Box 208
Poestenkill, NY 12140
Tel: (518) 283-3911
Fax: (518) 283-3545

JANE QUIN
CONSOLIDATED EDISON COMPANY OF
NEW YORK, INC.

4 Irving Place
New York, NY 10003
Tel: (212) 460-2571
Fax: (212) 677-5849

DENNIS SUGUMELE, P.E.
DOMINION TRANSMISSION, INC.
780 Cross Keys Office Park
Fairport, NY 14450
Tel: (716) 223-5606
Fax: (716) 223-0277
E-mail: ~~sugumele@dom.com~~

Dennis Sugumele

MICHAEL WHITEMAN, ESQ.
TIMOTHY P. MORRISON, ESQ.
WHITEMAN OSTERMAN & HANNA
One Commerce Plaza
Albany, NY 12260
Tel: (518) 487-7600
Fax: (518) 487-7777
E-mail: mw@woh.com
tpm@woh.com
(for Dominion Transmission,
Inc.)

WILLIAM P. SAVIERS, JR., ESQ.
DOMINION TRANSMISSION, INC.
445 West Main Street
Clarksburg, WV 26302
Tel: (304) 623-8340
Fax: (304) 623-8305
E-mail: william_p_saviers@
dom.com

JAMES F. WARDEN, JR.
NEW YORK STATE CONSUMER
PROTECTION BOARD
5 Empire State Plaza
Suite 2101
Albany, NY 12223-1556
Tel: (518) 474-5016
Fax: (518) 473-7482
E-mail: wardenj@consumer.
state.ny.us

JEFFREY B. DUROCHER, ESQ.
READ AND LANIADO, LLP
25 Eagle Street
Albany, NY 12207-1901
Tel: (518) 465-9313
Fax: (518) 465-9315
(for Shell Energy Services
Company, LLC)

STEVEN ADAMS
NEW YORK STATE ELECTRIC &
GAS CORPORATION
4500 Vestal Parkway East
Binghamton, NY 13902-3607
Tel: (607) 729-2551
Fax: (607) 762-8045
E-mail: sradams@nyseg.com

WILLIAM M. MARINELLI
NIAGARA MOHAWK POWER
CORPORATION
300 Erie Boulevard West
Syracuse, NY 13202
Tel: (315) 428-5915
Fax: (315) 428-5916
E-mail: marinelliw@nimo.com

SUSAN COVINO
ENRON CORPORATION
P.O. Box 453
10 Hoagland Drive
Belle Mead, NJ 08502
Tel: (908) 359-7658
Fax: (908) 359-0896
E-mail: scovino@enron.com

~~TIMOTHY MERRILL~~~~ENSEARCH ENERGY SERVICES~~~~680 Andersen Drive~~~~Foster Plaza Bldg. 10~~~~Suite 200~~~~Pittsburgh, PA 15220~~~~Tel: (412) 920-0935~~~~Fax: (412) 920-0822~~~~E-mail: twmerrill@~~~~worldnet.att.net~~

Jodi Larison

87 Clinton Ave.

S. Nyack, NY

10960

FRANK RISHE

ENRON CORP.

343 Thornall Street

Edison, NJ 08837

Tel: (732) 548-1234X223

Fax: (732) 549-5701

E-mail: frische@enron.com

CHERIE BROADRICK

RELIANT ENERGY

1111 Louisiana

No. 4207A

Houston, Texas 77002

Tel: (713) 207-7754

Fax: (713) 207-9819

E-mail: cheriebroadrick@
reliantenergy.com

DARRYL STREED

NORTH AMERICAN ENERGY

P.O. Box 400

20 West Third Street

Suite 10

Jamestown, NY 14702

Tel: (716) 664-2297

Fax: (716) 664-2476

E-mail: dstreed@

naenergy.com

ANTHONY J. CASTELLANO

CON EDISON ENERGY

701 Westchester Avenue

Suite 201 West

White Plains, NY 10604

Tel: (914) 993-2117

Fax: (914) 993-2111

E-mail: castellanoa@
conedenergy.com

REBECCA BACHELDER

ALENERGY MARKETING COMPANY

95 Sawyer Road

Waltham, MA 02453

Tel: (781) 906-2264

Fax: (781) 906-2002

MARTHA DUGGAN

STATOIL ENERGY

2800 Eisenhower Avenue

Alexandria, VA 22314

Tel: (703) 317-2257

Fax: (703) 317-2306

E-mail: mduggan@

statoilenergy.com

JOANNE S. SWIGGER

COLUMBIA BENERGY

121 Hillpointe Drive

Suite 100

Canonsburg, PA 15317

Tel: (724) 873-1300

Fax: (724) 873-1388

E-mail: jswogge@columbia
energy.com

**CASE 01-M-0075
PROPOSED MERGER
NIAGARA MOHAWK AND NATIONAL GRID
ACTIVE PARTY LIST
(As of January 13, 2003)**

LITIGATION JUDGE:

JOEL A. LINSIDER
NYS DEPARTMENT OF
PUBLIC SERVICE
3 Empire State Plaza
Albany, NY 12223-1350
Tel: (518) 474-8711
Fax: (518) 473-3263
Email: joel_linsider@
dps.state.ny.us

SETTLEMENT JUDGE:

ROBERT GARLIN
NYS DEPARTMENT OF
PUBLIC SERVICE
3 Empire State Plaza
Albany, NY 12223-1350
Tel: (518) 474-0739
Fax: (518) 473-3263
Email: robert_garlin@
dps.state.ny.us

ACTIVE PARTIES:

GLORIA KAVANAH, ESQ.
NIAGARA MOHAWK POWER
CORPORATION
111 Washington Avenue,
Suite 301
Albany, NY 12210
Phone: (518) 433-5221
Fax: (518) 433-5220
Email: kavanahg@
NiagaraMohawk.com

WILLIAM MARINELLI
LISA GAYLE BRADLEY, ESQ.
NIAGARA MOHAWK POWER
CORPORATION
300 Erie Blvd. West
Syracuse, NY 13202
Phone:
(315) 428-5915 (Marinelli)
(315) 428-3421 (Bradley)
Fax:
(315) 428-5916 (Marinelli)
(315) 428-6149 (Bradley)
Email: marinellim@
niagaramohawk.com
bradleyl@
niagaramohawk.com

STEVEN AGRESTA, ESQ.
SWIDLER BERLIN SHEREFF
FRIEDMAN, LLP
3000 K Street, N.W. Suite 300
Washington, DC 20007
Phone: (202) 424-7501
Fax: (202) 424-7692
Email: SJAgresta@Swidlaw.com
(For Niagara Mohawk)

THOMAS ROBINSON, ESQ.
NATIONAL GRID USA
25 Research Drive
Westborough, MA 01582
Phone: (508) 389-2877
Fax: (508) 389-2463
Email: thomas.robinson@
us.ngrid.com

JANE ASSAF, ESQ.
NYS DEPARTMENT OF
PUBLIC SERVICE
3 Empire State Plaza
Albany, NY 12223-1350
Phone: (518) 474-4535
Fax: (518) 486-5710
Email: jane_assaf@
dps.state.ny.us

NEW YORK POWER AUTHORITY
123 Main Street
White Plains, NY 10601

JOSEPH J. CARLINE, ESQ.
Phone: (914) 390-8009
Fax: (914) 390-8040
Email: joseph.carline@
nypa.gov

LINDA C. PAYNE
Phone: (914) 390-8107
Fax: (914) 390-8154
Email: linda.payne@
nypa.gov

JOSEPH F. CLEARY, ESQ.
6311 Sturbridge Court
Sarasota, FL 34238
Phone: (941) 925-2530
Fax:
Email: jcleary@gte.net

NATALIE PATISAW
JIM TRIPP, ESQ.
ENVIRONMENTAL DEFENSE
257 Park Avenue South
New York, NY 10010
Phone: (212) 616-1251
Fax: (212) 505-2375
Email: Jim_Tripp@
environmentaldefense.org
natalie_patasaw@
environmentaldefense.org

DAVID R. WOOLEY, ESQ.
YOUNG, SOMMER, LLC
5 Palisades Drive
Albany, NY 12205
Phone: (518) 438-9907 Ext. 238
Fax: (518) 438-9914
Email: dwooley@igc.org
(for American Wind Energy and
Association for
Environmental Defense)

ROBERT M. LOUGHNEY, ESQ.
MICHAEL B. MAGER, ESQ.
COUCH WHITE, LLP
540 Broadway
P. O. Box 22222
Albany, NY 12201-2222
Phone: (518) 426-4600
Fax: (518) 426-0376
Email: rloughney@
couchwhite.com
mmager@couchwhite.com
(For Multiple Intervenors)

STEVEN R. PINCUS, ESQ.
NIAGARA MOHAWK ENERGY
507 Plum Street
Syracuse, NY 13204
Phone: (315) 460-3363
Fax: (315) 460-3338
Email: PincusSR@NMEnergy.com

MARTHA DUGGAN
AMERADA HESS CORPORATION
~~2800 Eisenhower Avenue~~
~~3rd Floor~~
~~Alexandria, VA 22314~~
Phone: ~~(703) 317-2257~~
Fax: ~~(703) 317-2306~~
Email: mduggan@hess.com

1 Hess Plz.
Wood Bridge, NJ
07095-1229

MICHAEL J. SANTARCANGELO
DIRECTOR OF ENERGY POLICY
GEORGE M. KAZANJIAN
ASSISTANT COUNSEL
NYS DEPARTMENT OF ECONOMIC
DEVELOPMENT
30 South Pearl Street
Albany, NY 12245
Phone: (518) 292-5275
Fax: (518) 292-5804
(Santarcangelo)
Phone: (518) 292-5120
Fax: (518) 292-5807
(Kazanjan)
Email: msantarcangelo@
empire.state.ny.us
gkazanjan@
empire.state.ny.us

NICHOLAS J. PRIOLETTI, JR.
ENTRUST, LLC
499 Col. Eileen Collins Blvd.
North Syracuse, NY 13212
Phone: (315) 454-0892
Fax: (315) 234-5159
Email: nprioletti@
en-trust.com

KATHLEEN A. SULLIVAN, ESQ.
ENRON CORP.
1400 Smith Street
Suite 4718b
Houston, TX 77251-1188
Phone: (713) 354-7304
Fax: (713) 646-8160
Email: kathleen.sullivan@
enron.com

MATTHEW J. PICARDY, ESQ.
DYNERGY, INC.
101 Merrimac Street
2nd Floor
Boston, MA 02114
Phone: (617) 854-8212
Fax: (617) 854-8282
Email: mapi@dynergy.com

MELISSA L. LAUDERDALE, ESQ.
BRUNENKANT & HASKELL, LP
805 15th Street, N.W.
Suite 1101
Washington, DC 20005
Phone: (202) 408-0700
Fax: (202) 408-5959
Email: lauderdale@bh-law.com
(For Dynergy)

RICHARD W. GOLDEN
ASSISANT ATTORNEY GENERAL
NYS OFFICE OF ATTORNEY
GENERAL
120 Broadway
New York, NY 10271
Phone: (212) 416-8340
Fax: (212) 416-8877
Email: richard.golden@
oag.state.ny.us

JEFFREY B. DUROCHER, ESQ.
READ AND LANIADO, LLP
25 Eagle Street
Albany, NY 12207
Phone: (518) 465-9313
Fax: (518) 465-9315
Email: JBD@readlaniado.com
(For New York Energy Service
Providers Association
(NESPA))

WILLIAM R. GREEN
ENERGY ENTERPRISES, INC.
3401 Rochester Road
P. O. Box 687
Lakeville, NY 14480
Phone: (716) 346-2200
Fax: (716) 346-5214
Email: EeiBill@aol.com

CARL VAN KRALINGEN
SENECA HYDRO ACQUISITON
CORP AND BARBARA
WATERPOWER PRODUCTS, LTD.
239 Barrick Road
Port Colborne
Ontario L3K 5Z5, Canada
Phone: (905) 835-5661
Fax: (905) 835-1733
Email: carl@itcanada.com

ELINOR DUCAT
TANNERY ISLAND POWER
COMPANY
20785 Saint Lawrence Park Rd.
Alexander Bay, NY 13607
Phone: (800) 606-4707
Fax: (315) 482-6421
Email: Timber@gisco.net

JOHN M. SKORUPSKI
HYDRO POWER, INC.
3205 State Route 7
Johnsville, NY 12094-2717
Phone: (518) 663-7612
Fax: Same as phone number
Email: none

PAUL V. NOLAN, ESQ.

5515 N. 17th Street
Arlington, VA 22205
Phone: (703) 534-5509
Fax: (703) 538-5257
Email: pvnvvn@aol.com

SARA L. MILLER**REGULATORY WATCH, INC.**

P. O. Box 815
Albany, NY 12201
Phone: (518) 426-5126
Fax: (518) 427-8227
Email: smiller@
regulatorywatch.com

(For Energy Enterprises,
Inc., et al., Sandy Hollow
Power Company, Bellows
Tower Hydro, Inc., and
Fourth Branch Associates
(Mechanicville))

PAUL C. PREBLE, President
SANDY HOLLOW POWER COMPANY

~~683 Route 3A~~ *P.O. Box 1317*
~~Bow, NH 03504~~ *Wolfeboro, NH 03894-1317*
Phone: (603) ~~224-2010~~ *569-2709*
Fax:
Email: *sandyhollow@metrocast.net*

FRANK O. CHRISTIE**BELLOWS TOWER HYDRO, INC.**

2328 NYS Route 11B
North Bangor, NY 12966
Phone (989) 832-9082
Fax: Same as Phone
Email: chris-eng@
worldnet.att.net

JAMES A. BESHA, P.E.**FOURTH BRANCH ASSOCIATES
(MECHANICVILLE)**

455 New Karner Road
Albany, NY 12205
Phone: (518) 456-7712
Fax: (518) 456-8451
Email: jim@
albanyengineering.com

USHER FOGEL, ESQ.**ATTORNEY AT LAW**

557 Central Avenue, Suite 4A
Cedarhurst, NY 11516
Tel: (516) 374-8400 x108
Fax: (516) 374-2600
Cell: (516) 967-3242
Email: ufogel@aol.com
(For Small Customer Marketer
Coalition)

KATHERINE KENNEDY, ESQ.**NATURAL RESOURCES DEFENSE
COUNCIL**

40 West 20th Street
New York, NY 10011
Phone: (212) 727-4463
Fax: (212) 727-1773
Email: kkennedy@nrdc.org

RICHARD J. KODA**KODA CONSULTING, INC.**

409 Main Street
Ridgefield, CT 06877-4511
Phone: (203) 438-9045
Fax: (203) 438-7854
Email: rjkoda@javanet.com
(For IBEW, Local 97)

CHRIS WENTLENT**AES WESTOVER**

720 Riverside Drive
Johnson City, NY 13790
Phone: (607) 729-6950 x4421
Fax: (607) 729-0540
Email: cwentlent@aesc.com

CHUCK SJOBERG**TOM JESIKIEWICZ****AES SOMERSET**

7725 Lake Road
Barker, NY 14012
Phone: (716) 795-9501
Fax: (716) 795-3654
Email: csjoberg@aesc.com
tjesikiewicz@aesc.com

BEN WILES**PUBLIC UTILITY LAW PROJECT**

90 State Street, Suite 601
Albany, NY 12207-1715
Phone: (518) 449-3375
Fax: (518) 449-1769
Email: info@pulp.tc

RUBEN S. BROWN**THE E CUBED COMPANY, L.L.C.**

215 E. 79th Street
New York, NY 10021
Phone: (212) 585-1459
Fax: (212) 585-3852
Email: rsbrown@ecubedLLC.com

ROBERT A. WEISHAAR, JR.**McNEES, WALLACE & NURICK**

1200 G Street, N.W.
Suite 800
Washington, DC 20005
Phone: (202) 434-8991
Fax: (202) 347-0988
Email: rweishaa@mwnc.com
(For NYPA Industrial
Intervenors)

ROBERT J. HOBDAV**ENERGETIX, INC.**

755 Brooks Avenue
Rochester, NY 14619
Phone: (716) 724-8743
Fax: (716) 724-8241
Email: rhobday@energetix.net

Eric J. Wilen

~~**CATHY A. HUGHTON-DELZER**~~**NEW YORK STATE ELECTRIC &
GAS CORPORATION**

Corporate Drive
Kirkwood Industrial Park
P. O. Box 5224
Binghamton, NY 13902-5224
Phone: (607) 762-7009
Fax: (607) 762-8645
Email: ~~cahughton@delzer-~~ ejwilen@
nyseg.com

FRANK J. MILLER, ESQ.**HUBER LAWRENCE & ABELL**

605 Third Avenue
27th Floor
New York, NY 10158
Phone: (212) 682-6200
Fax: (212) 661-5759
Email: fmiller@huberlaw.com
(For New York State Electric
& Gas Corporation)

**ROCHESTER GAS & ELECTRIC
CORPORATION**

89 East Avenue
Rochester, NY 14649

THOMAS YURIK

Phone: (716) 771-2116
Fax: (716) 724-8405
Email: tom_yurik@rge.com

MARK O. MARINI

Phone: (716) 771-4692
Fax: (716) 724-8818
Email: mark_marini@rge.com

KAREN GEORGENSON GACH**NIXON PEOBODY, LLP**

Omni Plaza - Suite 900
30 South Pearl Street
Albany, NY 12207
Phone: (518) 427-2703
Fax: (518) 427-2666
Email:
kgach@nixonpeabody.com

JEFFREY C. STRAVINO, ESQ.**HODGSON RUSS LLP**

One M&T Plaza, Suite 2000
Buffalo, NY 14203-2391
Phone: (716) 848-1394
Fax: (716) 849-0349
Email: jstravin@
hodgsonruss.com
(For Advantage Energy, Inc.)

GLENN HAAKE**INDEPENDENT POWER PRODUCERS
OF NEW YORK, INC.**~~291 Hudson Avenue~~ 19 Dove St #302

Albany, NY 12210-1389

Phone: (518) 436-3749

Fax: (518) 436-0369

Email: glenn@ippny.org

DAVID B. JOHNSON, ESQ.**CRAIG M. INDYKE, ESQ.****READ AND LANIADO, LLP**

25 Eagle Street

Albany, NY 12207

Phone: (518) 465-9313

Fax: (518) 465-9315

Email: dbj@capital.net

cmi@readlaniado.com

**(For Independent Power
Producers of New York, Inc.)****KEITH J. ROLAND****ROLAND, FOGEL, KOBLLENZ &
PETROCCIONE, LLP**

One Columbia Place

Albany, NY 12207

Phone: (518) 434-8112

Fax: (518) 434-3232

Email: rfkc12207@aol.com

**(For County of Oswego
Industrial Development
Agency)****JAMES F. FAIRMAN, ESQ.****WHITFIELD RUSSELL ASSOCIATES**

1225 Eye Street NW, Suite 850

Washington, DC 20005

Phone: (202) 371-8200

Fax: (202) 371-2520

Email: wrussell@wrassoc.com

**(For Alliance for Municipal
Power)****JO-ANNE M. RAFFA****NYSEG SOLUTIONS, INC.**

2 Court Street

Binghamton, NY 13901

Phone: (607) 721-1712

Fax: (607) 721-1717

Email: jaffa@nge.com

JAMES F. WARDEN, JR.**NYS CONSUMER PROTECTION BOARD**

5 Empire State Plaza,

Suite 2101

Albany, NY 12223-1556

Phone: (518) 474-5016

Fax: (518) 473-7482

Email: wardenj@
consumer.state.ny.us**DAVID W. KOPLAS, ESQ.****LepCorp, INC.**

403 Main Street, Suite 630

P.O. Box 39

Buffalo, NY 14205-0039

Phone: (716) 842-1710,

Ext.212

Fax: (716) 842-1705

Email: dkoplas@localnet.com

KEYSPAN ENERGY

One MetroTech Center

Brooklyn, NY 11201-3850

NANCY C. CIANFLONE

Phone: (718) 403-2505

Fax: (718) 596-7802

Email: ncianflone@
keyspanenergy.com**CATHERINE L. NESSER, ESQ.**

Phone: (718) 403-3073

Fax: (718) 403-2698

Email: cnesser@
keyspanenergy.com

**WALTER W. HAASE
MICHAEL B. DARROCH
BOARD OF PUBLIC UTILITIES**

P. O. Box 700
Jamestown, NY 14702-0700
Phone: (716) 661-1670
Fax: (716) 661-1675
Email: whaase@
jamestownbpu.com
mdarroch@
jamestownbpu.com

**JEFFREY C. GENZER, ESQ.
ELI D. EILBOTT, ESQ.
DUNCAN, WEINBERG, GENZER &
PEMBROKE, P.C.**
1615 M Street, NW, Suite 800
Washington, DC 20036
Phone: (202) 467-6370
Fax: (202) 467-6379
Email: jcg@dwgp.com
ede@dwgp.com
(For the Board of Public
Utilities of the City of
Jamestown, New York)

**JOSHUA A. SABO, ESQ.
DONAHUE, SABO, VARNEY &
ARMSTRONG, P.C.**
One Winners Circle
P. O. Box 15056
Albany, NY 12212-5056
Phone: (518) 458-8922
Fax: (518) 438-4349
Email: jsabo@dsvalaw.com
(For City of Cohoes)

**SAM M. LANIADO
READ AND LANIADO, LLP**
25 Eagle Street
Albany, NY 12207-1901
Phone: (518) 465-9313
Fax: (518) 465-9315
Email: SML@readlaniado.com
(For Constellation Power
Source, Inc.)

**CELESTE A. SMITH, ESQ.
CONSOLIDATED EDISON COMPANY
OF NEW YORK, INC.**

4 Irving Place, Room 1815-S
New York, NY 10003
Phone: (212) 460-2020
Fax: (212) 677-5850
Email: smithce@coned.com

**MARK ZITO
NIAGARA POWER COALITION**
c/o Niagara Falls School
District
607 Walnut Avenue
Niagara Falls, NY 14301
Phone: (716) 286-4109
Fax: (716) 286-4283
Email:

**KERIN DUMPHREY
NIAGARA POWER COALITION**
c/o Niagara Wheatfield CSD
6700 Schultz Street
Niagara Falls, NY 14304
Phone: (716) 215-3024
Fax: (716) 215-3030
Email: kdumphrey@wzrd.com

**CAROL A. SMOOTS, ESQ.
ILIA LEVITINE, ESQ.
McKENNA & CUNEO, L.L.P.**
1900 K Street, N.W.
Washington, DC 20006
Phone: (202) 496-7500
Fax: (202) 496-7756
Email: carol_smoots@
mckennacuneo.com
ilia_levitine@
mckennacuneo.com
(For Niagara Power Coalition)

MICHAEL W. REVILLE, ESQ.
NATIONAL FUEL GAS
DISTRIBUTION CORPORATION
10 Lafayette Square
Buffalo, NY 14203
Phone: (716) 857-7313
Fax: (716) 857-7687
Email: Revillem@natfuel.com
MICHAEL W. GANG

JOHN H. ISOM
MORGAN, LEWIS & BOCKIUS, LLP
1 Commerce Square
417 Walnut Street
Harrisburg, PA 17101
Phone: (717) 237-4000
Fax: (717) 237-4004
Email: jisom@morganlewis.com
mgang@morganlewis.com
(For National Fuel Gas
Distribution Corporation)

ROBERT A. MULLANE
MUNICIPAL ELECTRIC UTILITIES
ASSOCIATION OF NEW YORK
STATE
445 Electronics Parkway
Suite 207
Liverpool, NY 13088
Phone: (315) 453-7851
Fax: (315) 453-7849
Email: info@meua.org

THOMAS L. RUDEBUSCH
DUNCAN, WEINBERG, GENZER &
PEMBROKE, P.C.
1615 M Street, N.W.
Suite 800
Washington, DC 20036
Phone: (202) 467-6370
Fax: (202) 467-6379
Email: tlr@dwgp.com
(For Municipal Electric
Utilities of New York State)

MICHAEL B. MAGER, ESQ.
COUCH WHITE, LLP
540 Broadway
P.O. Box 22222
Albany, NY 12201-2222
Phone: (518) 426-4600
Fax: (518) 426-0376
Email: mmager@couchwhite.com
(For Ski Resorts Coalition)

CRAIG G. GOODMAN, ESQ.
NATIONAL ENERGY MARKETERS
ASSOCIATION
3333 K Street, N.W., Suite
425
Washington, DC 20007
Phone: (202) 333-3288
Fax: (202) 333-3266
Email: cgoodman@
energymarketers.com

PAUL S. ECKHOFF
CHITTENDEN FALLS HYDRO POWER,
INC.
P. O. Box 158
Stuyvesant Falls, NY 12174
Phone: (518) 828-4684
Fax: (518) 822-0132
Email: pilsje@capital.net

ROBIN R. HOPE
NIAGARA MOHAWK ENERGY, INC.
507 Plum Street
Syracuse, NY 13204
Phone: (315) 460-3059
Fax: (315) 460-3022
Email: hoperr@nmenergy.com

BRENT ALDEFER
COMMUNITY ENERGY, INC.
150 Strafford Avenue
Suite 110
Wayne, PA 19087
Phone: (610) 254-9800
Fax: (610) 254-9781
Email: brent.aldefer@
newwindenergy.com

FLOYD J. HITCHCOCK

7 Rugby Road
East Greenbush, NY 12061
Phone: (518) 477-8115
Fax: Same as phone
Email: jhitch11@msn.com

BRIAN WILLEMSSEN

R.L. KISTLER, INC.

300 Buell Road
Rochester, NY 14624
Phone: (716) 436-1940
Fax: (716) 436-6606
Email: bwillemsen@
rlkistler.com

STEVEN D. AUGHEY, CEM

GERSTER TRANE ENERGY SERVICES

45 Earhart Drive
Suite 103
Buffalo, NY 14221
Phone: (716) 626-1260
Fax: (716) 626-7539
Email: sdaughey@trane.com

JANE ORK

BUFFALO SEWER AUTHORITY

90 West Ferry Street
Buffalo, NY 14213
Phone: (716) 883-1820 x. 237
Fax: (716) 883-3789
Email: jane@
sa.ci.buffalo.ny.us

SARA O'NEILL

AES NewEnergy, Inc.

551 Fifth Avenue
Suite 400
New York, NY 10176
Phone: (212) 883-5880
Fax: (212) 883-5888
Email: sara.oneill@
aesmail.com

**Niagara Mohawk Gas Retail Competition
Customer Outreach and Education Research Questionnaire
Residential Gas Awareness & Understanding Questionnaire**

Introduction

S1. Hello, this is _____ calling on behalf of Niagara Mohawk.
May I speak with the person in your household who is responsible for
energy decisions?

1. Yes
2. Not available (Schedule Call Back)
3. Refused (Thank & Terminate)
4. Not responsible for bill (Renter) (Thanks and Terminate)
5. No gas service in area (Thank and Terminate)
6. Not a Niagara Mohawk customer (Thank and Terminate)
7. Business (Switch to Business Survey)

Intro My name is _____ from Opinion Dynamics, a national
market research firm. Niagara Mohawk, a National Grid Company, is sponsoring
this research to help them understand how to better serve their natural gas
customers.

CallBack When would be the best time to call back?

1. Refused
2. Set Appointment
3. Call back after
4. Call back any time

Customer Awareness

Q1. Do you know if Niagara Mohawk customers have a choice of natural gas
suppliers?

1. Yes
2. No
3. Don't Know (Do Not Read)
4. Refused (Do Not Read)

Q2. How IMPORTANT do you think it is that customers be able to choose their natural gas supplier? Would you say that it is: Extremely Important, Somewhat Important, Neither Important nor Unimportant, Somewhat Unimportant or Not at all Important.

1. Extremely Important
2. Somewhat Important
3. Neither Important nor Unimportant
4. Somewhat Unimportant
5. Not at all Important
6. Don't Know (Do Not Read)
7. Refused (Do Not Read)

Q3. How INTERESTED are you in being able to choose your household's natural gas supplier? Would you say that you are Extremely Interested, Somewhat Interested, Neither Interested nor Disinterested, Somewhat Disinterested, Very Disinterested?

1. Extremely Interested
2. Somewhat Interested
3. Neither Interested nor Disinterested
4. Somewhat Disinterested
5. Very Disinterested
6. Don't Know (Do Not Read)
7. Refused (Do Not Read)

Customer Understanding

(Programmer Instructions: IF Q1=2, 3 or 4 skip to Q6)

Q4. How well do you think you UNDERSTAND how to choose a natural gas supplier? Would you say: Extremely Well, Somewhat Well, Neither Well nor Not Well, Not Well, or Not at all Well?

1. Extremely Well
2. Somewhat Well
3. Neither Well nor Not Well
4. Not Well
5. Not at all Well
6. Don't Know (Do Not Read)
7. Refused (Do Not Read)

Diagnostics for Customer Understanding

Q5. I am now going to read some general statements about Niagara Mohawk. Please tell me if you Strongly Agree, Somewhat Agree, Neither Agree nor Disagree, Somewhat Disagree or Strongly Disagree with each of these statements. (ROTATE ORDER)

1. Strongly Agree
2. Somewhat Agree
3. Neither Agree nor Disagree
4. Somewhat Disagree
5. Strongly Disagree
6. Don't Know/ No Opinion
7. Refused

(COLLECT DATA FOR ENTIRE SET AND THEN READ PROGRAMMED RESPONSES FOR THE ONES THAT APPLY)

- a. Niagara Mohawk supports customer's having a choice of suppliers.

IF RESPONDENT SAYS 4 or 5 THEN READ: "Niagara Mohawk does support customer's having a choice of natural gas suppliers."

- b. If I switch to another natural gas supplier, the safety and reliability of my gas service will be the responsibility of my new supplier.

IF RESPONDENT SAYS 1 or 2 THEN READ: "If you switch to another natural gas supplier, Niagara Mohawk will continue to be responsible for the safety and reliability of your gas service."

- c. If I switch to another natural gas supplier, Niagara Mohawk will no longer respond to my gas emergencies.

IF RESPONDENT SAYS 1 or 2 THEN READ: "If you switch to another natural gas supplier, Niagara Mohawk will continue to respond to your gas emergencies."

- d. If I switch to another natural gas supplier, Niagara Mohawk will continue to be responsible for delivering natural gas to my home.

IF RESPONDENT SAYS 4 or 5 THEN READ: "If you switch to another natural gas supplier, Niagara Mohawk will continue to be responsible for delivering natural gas to your home."

- e. ***[question accidentally omitted in 2002 to be reintroduced in 2003] If I switch to another natural gas supplier, I should call the new supplier in the event of a gas leak or other emergency.***

IF RESPONDENT SAYS 1 or 2 THEN READ: "If you switch to another natural gas supplier, you should continue to call Niagara Mohawk in the event of a gas leak or other emergency.

- f. If I switch to another natural gas supplier, I can switch back to Niagara Mohawk for my gas supply at any time.

IF RESPONDENT SAYS 5 THEN READ: "If you switch to another natural gas supplier, Niagara Mohawk will take you back at any time.

- g. If I switch to another supplier and they run out of gas, Niagara Mohawk will then supply gas to my business.

IF RESPONDENT SAYS 4 or 5 THEN READ: "If your new supplier runs out of gas, Niagara Mohawk will supply gas to your business."

Communications
(All Respondents)

Q6a. Have you seen anything from Niagara Mohawk that explains how customers choose their natural gas supplier?

1. Yes
2. No
3. Don't Know (Do Not Read)
4. Refused (Do Not Read)

Q6b. Have you seen anything from an ALTERNATE SUPPLIER about switching natural gas suppliers?

1. Yes
2. No
3. Don't Know (Do Not Read)
4. Refused (Do Not Read)

Q6c. Of the following, which are the best ways for Niagara Mohawk to let you know about choices and opportunities for switching suppliers? (READ CHOICES, ALLOW MULTIPLE RESPONSES, ROTATE ORDER).

1. Local Television
2. Cable TV
3. Newspaper
4. Radio
5. Direct Mail
6. Internet
7. Utility Bill Insert
8. Town Meeting
9. Community Event
10. Business or Professional Association Meeting
11. Trade Ally
12. Account Representative
13. None of the above
14. Don't Know (Do Not Read)
15. Refused (Do Not Read)

Q6_o. Are there any other ways that you can think of?

_____ Probe and Be Specific

Q7. Is there anything about choosing a natural gas supplier that you would like more information on from Niagara Mohawk?

Customer Switching Tendencies

Q8a. With Niagara Mohawk customers now able to choose natural gas suppliers how likely are you to actively search for a new supplier – other than Niagara Mohawk? Would you say you are Very Likely, Somewhat Likely, Neither Likely or Unlikely, Somewhat Unlikely, Not at all Likely?

1. Very Likely
2. Somewhat Likely
3. Neither Likely nor Unlikely
4. Somewhat Unlikely
5. Not at all Likely
6. Don't Know (Do Not Read)
7. Refused (Do Not Read)
8. Actively searching now (Do Not Read)
9. Have searched in the past (Do Not Read)
10. Have already switched suppliers (Do Not Read)

Q8b. Please tell me what factor would be most important for you when choosing one natural gas supplier over another. (DO NOT READ. MULTIPLE CHOICES ALLOWED)

1. Better rates/prices
2. Better overall service
3. Increased reliability
4. Customer Service
5. Reputation
6. Location of Company
7. Good advertising or marketing campaign
8. Special promotional offers
9. Don't like current supplier
10. Just want to try a new or different company
11. Other (specify _____)
12. Don't Know (Do Not Read)
13. Refused (Do Not Read)

(IF ONLY ONE RESPONSE IN Q8B, INSERT ANSWER IN Q8C and SKIP Q8C.)

Q8c. For those choices you just mentioned, which ONE factor would be the MOST important to you?

IF Q8A=10, SKIP TO Q10, OTHERWISE CONTINUE

Q9. Your natural gas supplier is currently Niagara Mohawk. Please tell me why you have not switched to a different natural gas supplier? (DO NOT READ CHOICES. ALLOW MULTIPLE CHOICES)

1. Rates or prices
2. Overall Service
3. Reliability
4. I Like Niagara Mohawk
5. Customer Service of Niagara Mohawk
6. Customer Service of other suppliers
7. Safety Record of Niagara Mohawk
8. Concern for Safety Record of other suppliers
9. Reputation of Niagara Mohawk
10. Reputation of other suppliers
11. Niagara Mohawk is a local company
12. Trust Niagara Mohawk
13. Don't trust other suppliers
14. Don't want to switch
15. Don't Know (Do Not Read)
16. Refused (Do Not Read)
17. Other (specify _____)
18. Not Applicable

Q10. How much savings would a natural gas supplier have to offer before you would consider switching?

1. _____-%
2. None – price wouldn't be a deciding factor
3. Won't switch for any price
4. Don't Know (Do Not Read)
5. Refused (Do Not Read)

Satisfaction with Niagara Mohawk

Q11. Overall, how satisfied are you with Niagara Mohawk? Would you say that you are Very Satisfied, Somewhat Satisfied, Neither Satisfied nor Dissatisfied, Somewhat Dissatisfied, Not at all Satisfied.

1. Very Satisfied
2. Somewhat Satisfied
3. Neither Satisfied nor Dissatisfied
4. Somewhat Dissatisfied
5. Not at all Satisfied
6. Don't Know (Do Not Read)
7. Refused (Do Not Read)

Demographics

Finally, I would like to ask you a few brief questions for classification purposes only. This information will be used in total only and you will not be identified with any of this data.

Q14. Do you own or rent this residence?

- 1 Own
- 2 Rent
- 3 Don't know/Refused (Do Not Read)

Q15. What was the last year of school you completed? (READ CHOICES IF NECESSARY)

- 1 8th grad or less
- 2 Some High School
- 3 High School Graduate
- 4 Trade or Technical School
- 5 Some College
- 6 4-Year College Degree
- 7 Some Graduate Courses
- 8 Advanced Degree
- 9 Don't know/Refused (Do Not Read)

Q16. In which age category may I place you? (READ CHOICES IF NECESSARY)

- 1 Under 20
- 2 20's
- 3 30's
- 4 40's
- 5 50's
- 6 60's
- 7 70 or Older
- 8 Don't know/Refused (Do Not Read)

Q17. Which of the following best describes your household income. Please stop me at the correct range.... (READ CHOICES)

- 1 Less than \$20,000
- 2 \$20,000-\$39,999
- 3 \$40,000-\$59,999
- 4 \$60,000-\$79,999
- 5 \$80,000 -\$99,999
- 6 \$100,000 - \$119,999
- 7 \$120,000 – 139,999
- 8 \$140,000 - \$159,999
- 9 \$160,000 - \$179,999
- 10 \$180,000 - \$199,000
- 11 \$200,000 or more
- 12 Refused (Do Not Read)

On behalf of Niagara Mohawk, I would like to thank you for your cooperation.
(INTERVIEWER: SELECT GENDER OF RESPONDENT)

1. Male
2. Female

Niagara Mohawk Gas Retail Competition
Customer Outreach and Education Research Questionnaire
Commercial Gas Awareness & Understanding Questionnaire

Introduction

S1. Hello, this is _____ calling on behalf of Niagara Mohawk.
May I speak with the person who is responsible for energy decisions for
your business?

1. Yes
2. Not available (Schedule Call Back)
3. Refused (Thank & Terminate)
4. Not responsible for bill (Renter) (Thanks and Terminate)
5. No gas service in area (Thank and Terminate)
6. Not a Niagara Mohawk customer (Thank and Terminate)
7. Residence (Switch to Residential Survey)

Intro My name is _____ from Opinion Dynamics, a national
market research firm. Niagara Mohawk, a National Grid Company, is sponsoring
this research to help them understand how to better serve their natural gas
customers.

S2. Which of the following best describes your role in making company energy
use decisions?

1. I am the final decision maker
2. I am one of the final decision makers
3. I have no role in decision making (Schedule Call Back)
4. Refused at this time (Schedule Call Back)
5. Energy decisions are made at corporate level (Collect Referral
Name and Number)
6. Don't Know/Refused (Thank and Terminate)

CallBack When would be the best time to call back?

1. Refused
2. Set Appointment
3. Call back after
4. Call back any time

Customer Awareness

Q1. Do you know if Niagara Mohawk customers have a choice of natural gas suppliers?

1. Yes
2. No
3. Don't Know (Do Not Read)
4. Refused (Do Not Read)

Q2. How IMPORTANT do you think it is that business customers be able to choose their natural gas supplier? Would you say that it is: Extremely Important, Somewhat Important, Neither Important nor Unimportant, Somewhat Unimportant or Not at all Important.

1. Extremely Important
2. Somewhat Important
3. Neither Important nor Unimportant
4. Somewhat Unimportant
5. Not at all Important
6. Don't Know (Do Not Read)
7. Refused (Do Not Read)

Q3. How INTERESTED are you in being able to choose your company's natural gas supplier? Would you say that you are Extremely Interested, Somewhat Interested, Neither Interested nor Disinterested, Somewhat Disinterested, Very Disinterested?

1. Extremely Interested
2. Somewhat Interested
3. Neither Interested nor Disinterested
4. Somewhat Disinterested
5. Very Disinterested
6. Don't Know (Do Not Read)
7. Refused (Do Not Read)

Customer Understanding

(PROGRAMMER NOTE: IF Q1=2, 3 or 4 THEN SKIP TO Q6a)

Q4. How well do you think you UNDERSTAND how to choose a natural gas supplier? Would you say: Extremely Well, Somewhat Well, Neither Well nor Not Well, Not Well, or Not at all Well?

1. Extremely Well
2. Somewhat Well
3. Neither Well nor Not Well
4. Not Well
5. Not at all Well
6. Don't Know (Do Not Read)
7. Refused (Do Not Read)

Diagnostics for Customer Understanding

Q5. I am now going to read some general statements about Niagara Mohawk. Please tell me if you Strongly Agree, Somewhat Agree, Neither Agree nor Disagree, Somewhat Disagree or Strongly Disagree with each of these statements. (ROTATE ORDER)

1. Strongly Agree
2. Somewhat Agree
3. Neither Agree nor Disagree
4. Somewhat Disagree
5. Strongly Disagree
6. Don't Know/ No Opinion
7. Refused

(COLLECT DATA FOR ENTIRE SET AND THEN READ PROGRAMMED RESPONSES FOR THE ONES THAT APPLY)

a. Niagara Mohawk supports customer's having a choice of suppliers.

IF RESPONDENT SAYS 4 or 5 THEN READ: "Niagara Mohawk does support customer's having a choice of natural gas suppliers."

b. If I switch to another natural gas supplier, the safety and reliability of my gas service will be the responsibility of my new supplier.

IF RESPONDENT SAYS 1 or 2 THEN READ: "If you switch to another natural gas supplier, Niagara Mohawk will continue to be responsible for the safety and reliability of your gas service."

- c. If I switch to another natural gas supplier, Niagara Mohawk will no longer respond to my gas emergencies.

IF RESPONDENT SAYS 1 or 2 THEN READ: "If you switch to another natural gas supplier, Niagara Mohawk will continue to respond to your gas emergencies."

- d. If I switch to another natural gas supplier, Niagara Mohawk will continue to be responsible for delivering natural gas to my business.

IF RESPONDENT SAYS 4 or 5 THEN READ: "If you switch to another natural gas supplier, Niagara Mohawk will continue to be responsible for delivering natural gas to your business."

- e. [question accidentally omitted in 2002 to be reintroduced in 2003] If I switch to another natural gas supplier, I should call the new supplier in the event of a gas leak or other emergency.

IF RESPONDENT SAYS 1 or 2 THEN READ: "If you switch to another natural gas supplier, you should continue to call Niagara Mohawk in the event of a gas leak or other emergency."

- f. If I switch to another natural gas supplier, I can switch back to Niagara Mohawk for my gas supply at any time.

IF RESPONDENT SAYS 5 THEN READ: "If you switch to another natural gas supplier, Niagara Mohawk will take you back at any time."

- g. If I switch to another supplier and they run out of gas, Niagara Mohawk will then supply gas to my business.

IF RESPONDENT SAYS 4 or 5 THEN READ: "If your new supplier runs out of gas, Niagara Mohawk will supply gas to your business."

Communications
(All Respondents)

Q6a. Have you seen anything from Niagara Mohawk that explains how customers choose their natural gas supplier?

1. Yes
2. No
3. Don't Know (Do Not Read)
4. Refused (Do Not Read)

Q6b. Have you seen anything from an ALTERNATE SUPPLIER about switching natural gas suppliers?

1. Yes
2. No
3. Don't Know (Do Not Read)
4. Refused (Do Not Read)

Q6c. Of the following, which are the best ways for Niagara Mohawk to let you know about choices and opportunities for switching suppliers? (READ CHOICES, ALLOW MULTIPLE RESPONSES, ROTATE ORDER).

1. Local Television
2. Cable TV
3. Newspaper
4. Radio
5. Direct Mail
6. Internet
7. Utility Bill Insert
8. Town Meeting
9. Community Event
10. Business or Professional Association Meeting
11. Trade Ally
12. Account Representative
13. None of the above
14. Don't Know (Do Not Read)
15. Refused (Do Not Read)

Q6_o. Are there any other ways that you can think of?

_____ Probe and Be Specific

Q7. Is there anything about choosing a natural gas supplier that you would like more information on from Niagara Mohawk?

Customer Switching Tendencies

Q8a. With Niagara Mohawk customers now able to choose natural gas suppliers how likely are you to actively search for a new supplier – other than Niagara Mohawk? Would you say you are Very Likely, Somewhat Likely, Neither Likely or Unlikely, Somewhat Unlikely, Not at all Likely?

1. Very Likely
2. Somewhat Likely
3. Neither Likely nor Unlikely
4. Somewhat Unlikely
5. Not at all Likely
6. Don't Know (Do Not Read)
7. Refused (Do Not Read)
8. Actively searching now (Do Not Read)
9. Have searched in the past (Do Not Read)
10. Have already switched suppliers (Do Not Read)

Q8b. Please tell me what factor would be most important for you when choosing one natural gas supplier over another. (DO NOT READ. MULTIPLE CHOICES ALLOWED)

1. Better rates/prices
2. Better overall service
3. Increased reliability
4. Customer Service
5. Reputation
6. Location of Company
7. Good advertising or marketing campaign
8. Special promotional offers
9. Don't like current supplier
10. Just want to try a new or different company
11. Other (specify _____)
12. Don't Know (Do Not Read)
13. Refused (Do Not Read)

(IF ONLY ONE RESPONSE IN Q8B, INSERT ANSWER IN Q8C and SKIP Q8C.)

Q8c. For those choices you just mentioned, which ONE factor would be the MOST important to you?

IF Q8A=10, SKIP TO Q10, OTHERWISE CONTINUE

Q9. Your natural gas supplier is currently Niagara Mohawk. Please tell me why you have not switched to a different natural gas supplier? (DO NOT READ CHOICES. ALLOW MULTIPLE CHOICES)

1. Rates or prices
2. Overall Service
3. Reliability
4. I Like Niagara Mohawk
5. Customer Service of Niagara Mohawk
6. Customer Service of other suppliers
7. Safety Record of Niagara Mohawk
8. Concern for Safety Record of other suppliers
9. Reputation of Niagara Mohawk
10. Reputation of other suppliers
11. Niagara Mohawk is a local company
12. Trust Niagara Mohawk
13. Don't trust other suppliers
14. Don't want to switch
15. Don't Know (Do Not Read)
16. Refused (Do Not Read)
17. Other (specify _____)
18. Not Applicable

Q10. How much savings would a natural gas supplier have to offer before you would consider switching?

1. _____-%
2. None – price wouldn't be a deciding factor
3. Won't switch for any price
4. Don't Know (Do Not Read)
5. Refused (Do Not Read)

Satisfaction with Niagara Mohawk

Q11. Overall, how satisfied are you with Niagara Mohawk? Would you say that you are Very Satisfied, Somewhat Satisfied, Neither Satisfied nor Dissatisfied, Somewhat Dissatisfied, Not at all Satisfied.

1. Very Satisfied
2. Somewhat Satisfied
3. Neither Satisfied nor Dissatisfied
4. Somewhat Dissatisfied
5. Not at all Satisfied
6. Don't Know (Do Not Read)
7. Refused (Do Not Read)

Demographics

Finally, I would like to ask you a few brief questions for classification purposes only. This information will be used in total only and your company will not be identified with any of this data.

Q12. What is the primary business of your company?

1. Retail
2. Food/Restaurant/Tavern
3. Manufacturing/Production
4. Packaging/Mail/Delivery
5. Recreation/Amusement
6. Finance/Insurance/Real Estate
7. Communications
8. Hotel/Motel/Landlord
9. Education/Government/Healthcare
10. Stone/Clay/Glass
11. Metals/Primary/Fabricating
12. Brewery/Bottler
13. Service/Repair
14. Chemicals/Rubber/Plastics
15. Paper & Allied Products
16. Farm
17. Religious Institution
18. Professional (Dr/CPA/Legal)
19. Sales or Sales Co. (not retail)
20. Other (specify _____)
21. Don't Know/Refused (Do Not Read)

Q13. What primary job responsibility do you have in the company?

1. Owner/Partner
2. Business Manager/Manager/Assistant Manager
3. Executive
4. Foreman
5. Other (specify _____)
6. Don't Know/Refused (Do Not Read)

Q14. How many employees, full plus part-time does your company employ at this location? (READ CHOICES)

1. 1-5
2. 6-10
3. 11-20
4. 21-35
5. 36-50
6. 51-99
7. 100-199
8. 200 or more
9. Don't Know/Refused (Do Not Read)

Q15. Does this company have more than one site in New York State?

1. Yes
2. No
3. Don't Know/Refused (Do Not Read)

Q16. Is your company revenue at this site...(READ CHOICES)

1. below \$500,000
2. Between \$500,001 and \$1 million
3. Between \$1,000,001 and \$5 million
4. Between \$5,000,001 and \$25 million
5. Between \$25,000,001 and \$50 million
6. Between \$50,000,001 and \$100 million
7. Greater than \$100 million
8. Don't know/Refused (Do Not Read)

On behalf of Niagara Mohawk, I would like to thank you for your cooperation.
(INTERVIEWER: SELECT GENDER OF RESPONDENT)

1. Male
2. Female

National Grid

Natural Gas Retail Competition Survey

2005 Tracking Survey

November 2005

Introduction

Introduction

Objective

- Measure current level of customer awareness and understanding of the competitive market for natural gas
 - Segmented by customer class (residential and commercial)
 - Segmented by geographic location

Methodology

- Telephone interviewing by Opinion Dynamic Corporation. Completed 809 residential surveys, 751 commercial surveys.
- Two phase telephone survey to customers
 - Baseline survey was completed in October 2000.
 - Four follow-up surveys to track changes in awareness and understanding and measure effectiveness of National Grid's outreach and education efforts were completed in October 2001, November 2002, October 2003, February 2005, and October 2005 (current).

Survey Methodology

- A proportional sampling methodology was used to develop and allocate the sample required to achieve overall results with a sampling error of +/- 3.5% for each of the Residential and Commercial classes. The overall sampling error is accurate at the 95% confidence level.
- The proportional sample design was based on actual customer distributions within the 5 NMPC Gas Operating Regions and resulted in the following interviews by Region:

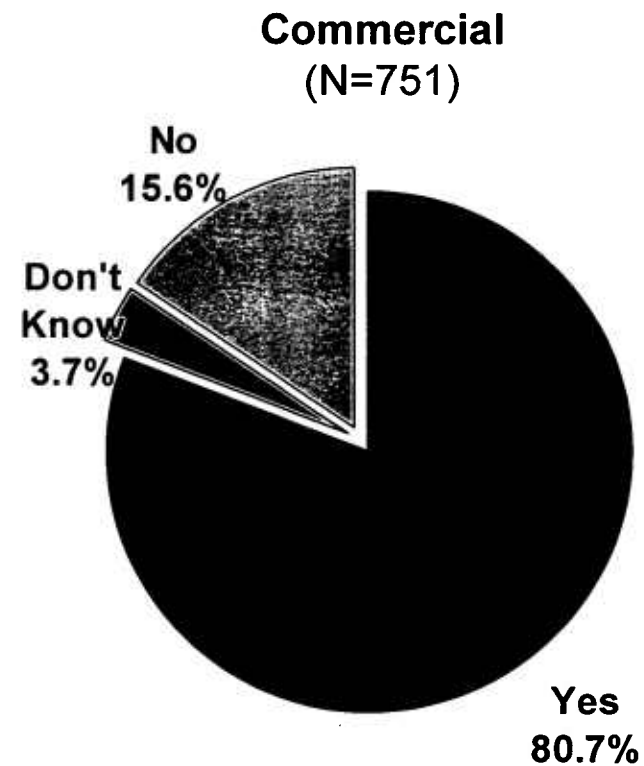
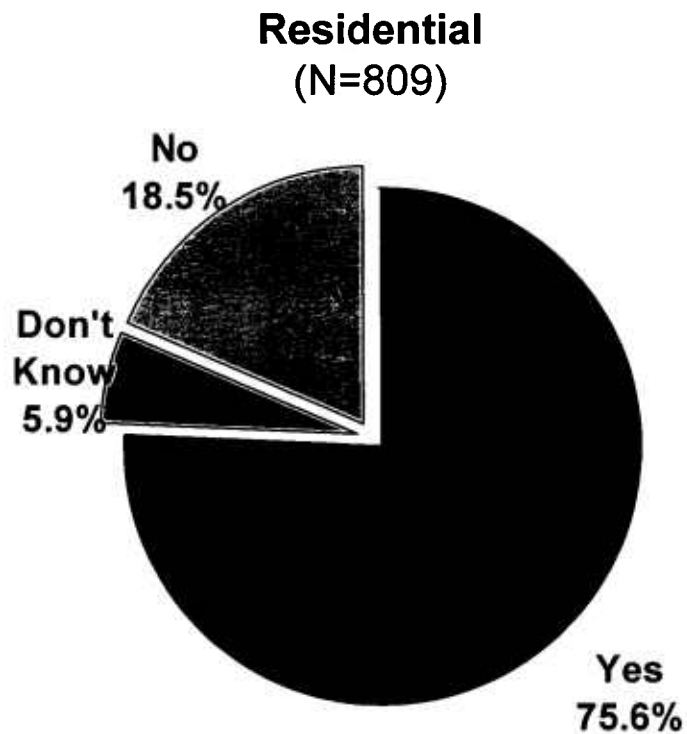
	<u>Residential (n=809)</u>	<u>Commercial (n=751)</u>
– Central	268	214
– Mohawk	120	117
– Northern	24	38
– Capital	300	281
– Northeast	97	101

- Interviewing was conducted in November 2005 by Opinion Dynamics interviewers using CATI software. The interviews were approximately 10 minutes long.

Awareness, Importance and Interest in Retail Competition

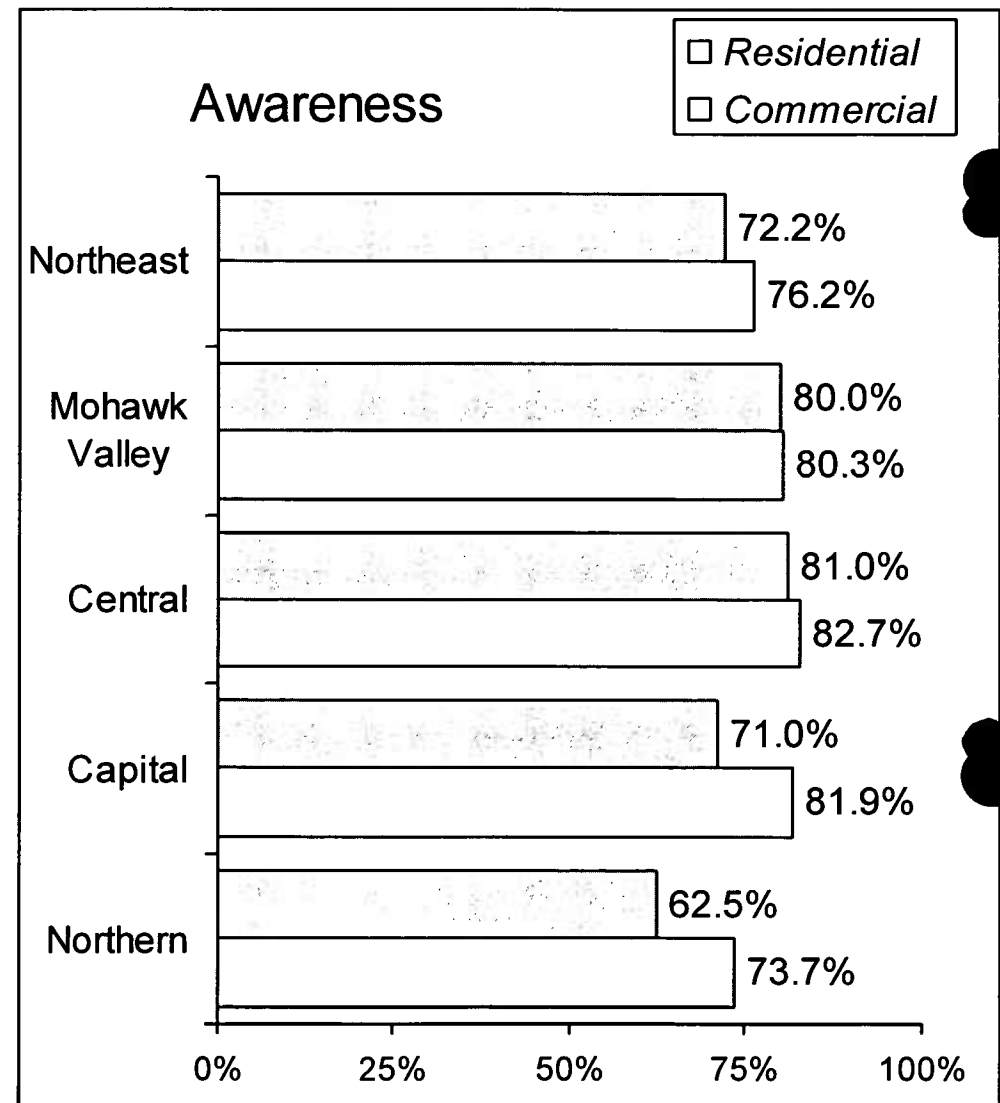
Q1. Awareness

- A majority of both residential and commercial respondents are aware of competition in the natural gas industry.



Q1. Awareness by Geographical Region

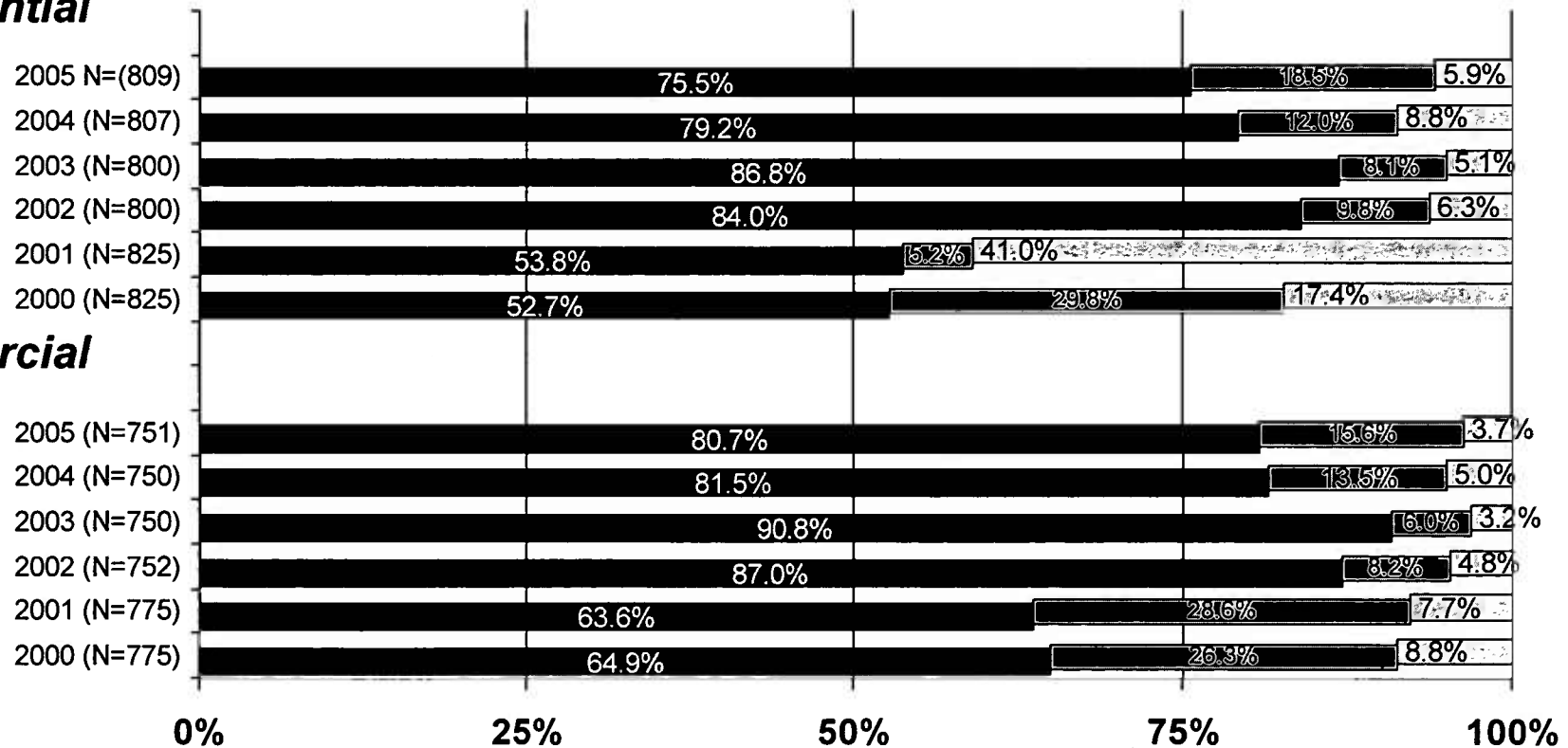
- Central Region residential respondents reported the highest awareness of retail competition among regions.
- Central Region commercial respondents reported the highest awareness among regions.
- In all regions commercial respondents reported higher awareness of supplier choice than residential respondents.
- The largest differences between residential and commercial respondents are in the Capital (10.9 percentage points) and Northern (11.2 points) regions.



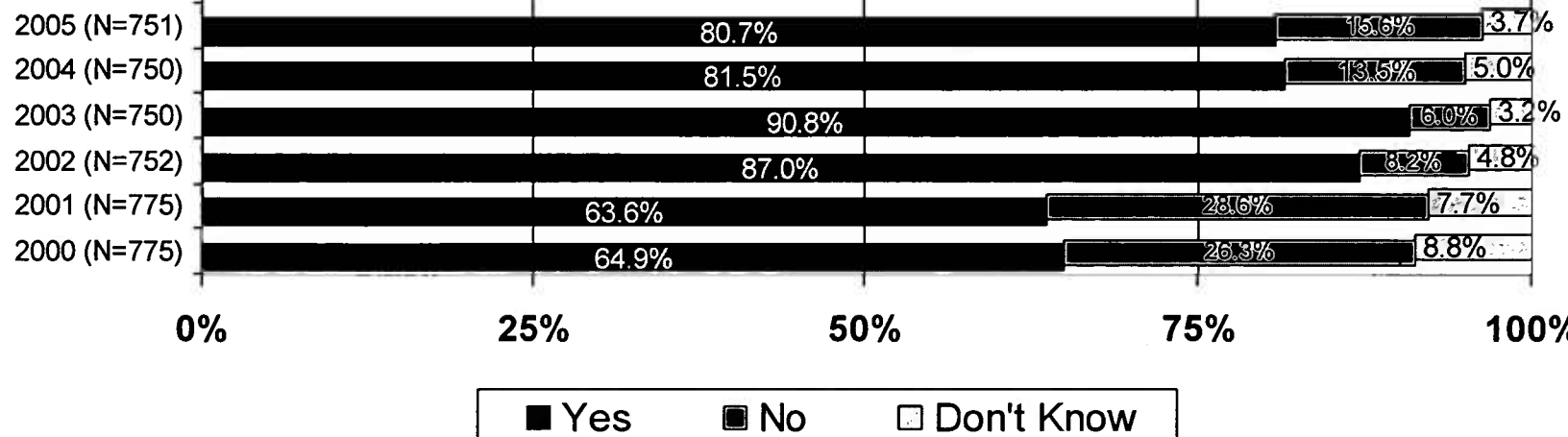
Q1. Awareness 2000-2005

- Awareness of natural gas retail competition decreased slightly between 2004 and 2005. The percent of commercial respondents aware dropped from 81.5% to 80.7%. The percent of residential respondents aware dropped from 79.2% to 75.5%.

Residential

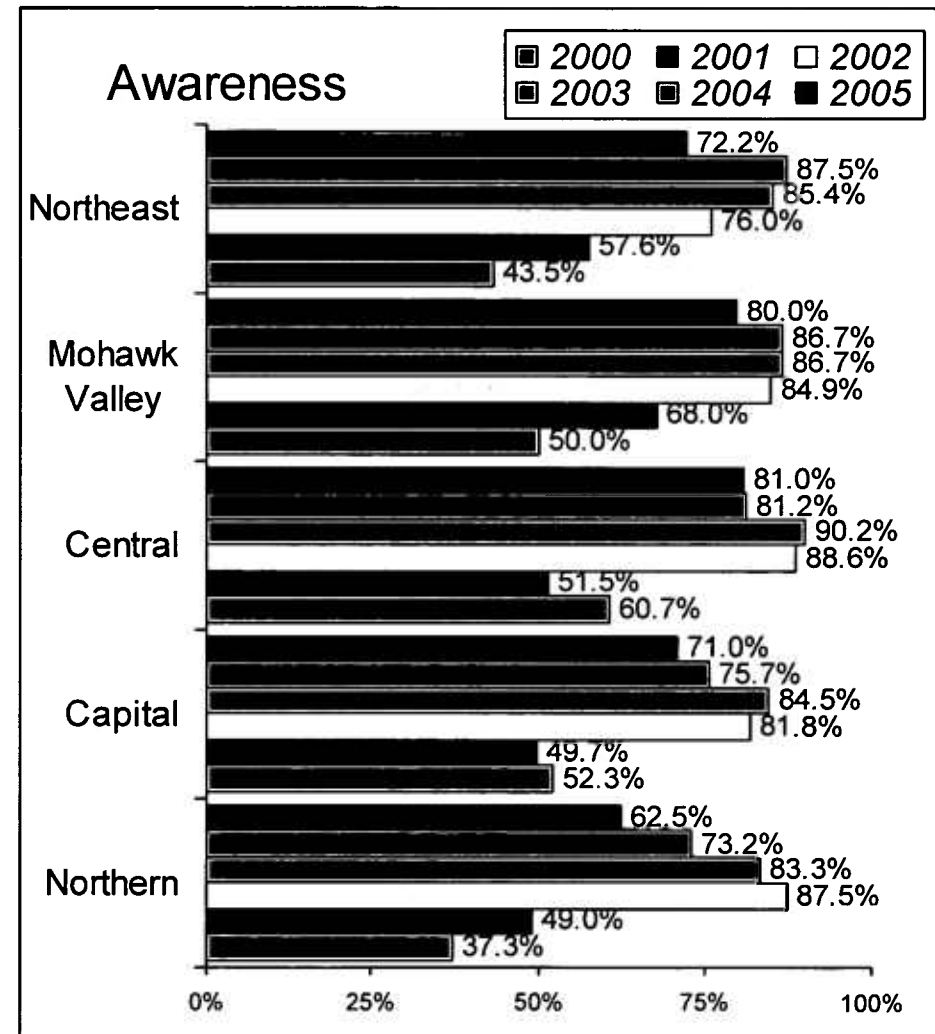


Commercial



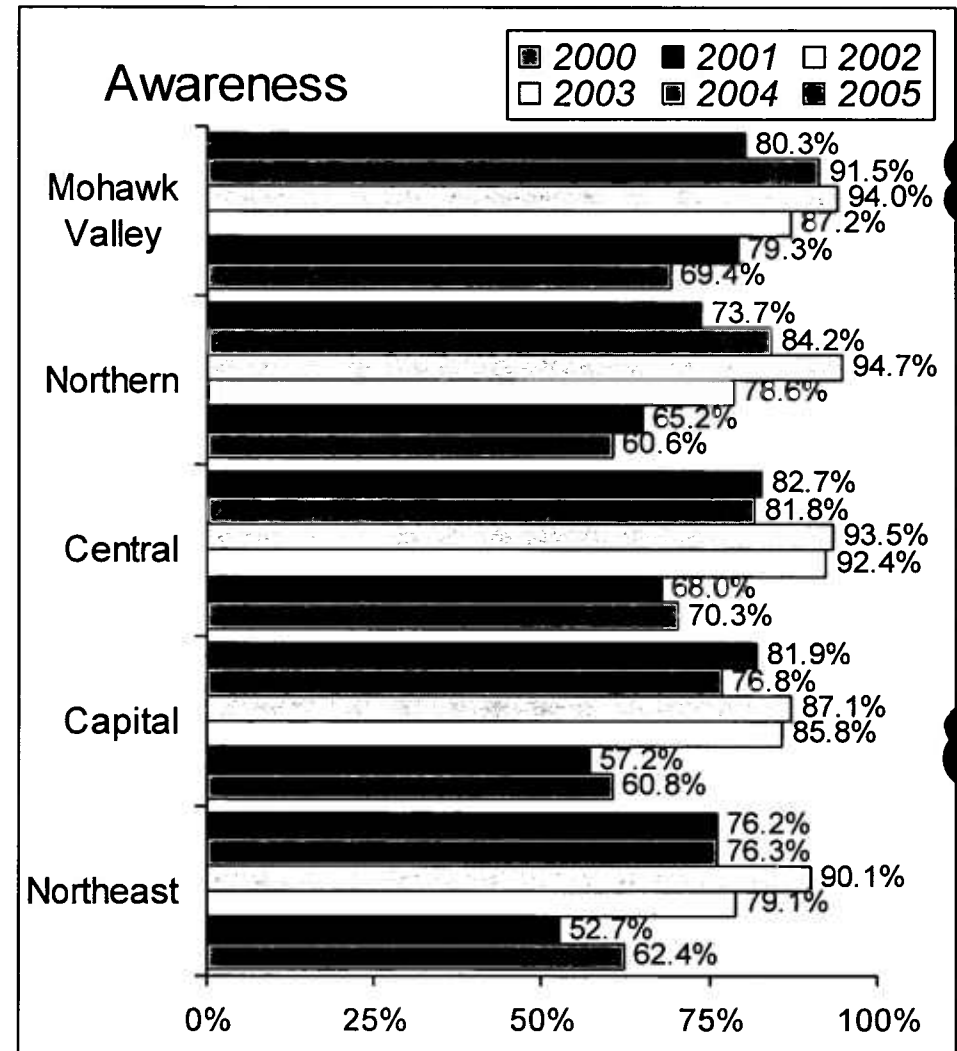
Q1. Residential Awareness by Geographical Region 2000-2005

- Awareness among residential respondents declined in all regions between 2004 and 2005. However, awareness remains higher than levels observed in 2000 and 2001 in all regions.
- The Northeast region's level of awareness declined the most by 15.3 percentage points between 2004 and 2005.



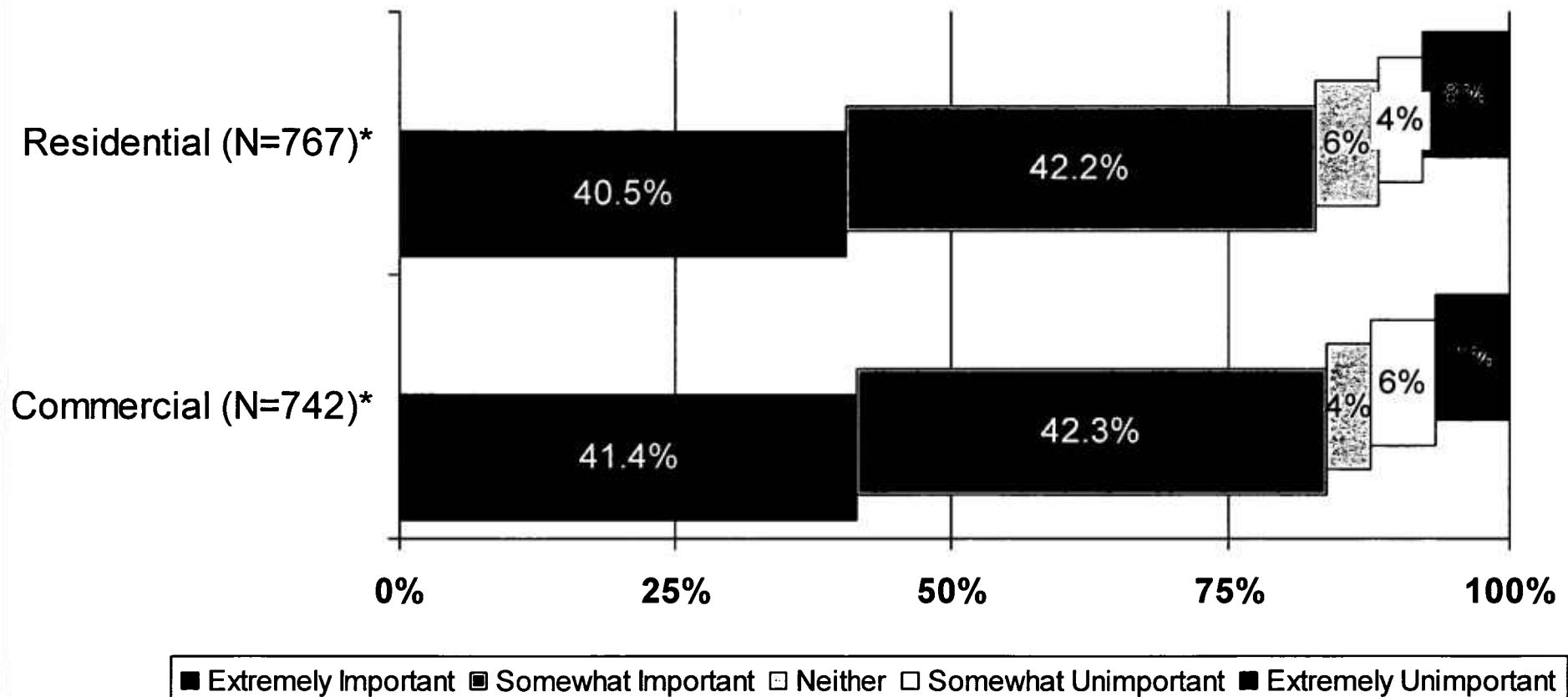
Q1. Commercial Awareness by Geographical Region 2000-2005

- Commercial respondent awareness of natural gas retail competition declined in all but the Central region where it increased by 0.9 percentage points and in the Capital region where it increased 5.1 percentage points between 2004 and 2005.
- The largest declines in awareness occurred in the Mohawk Valley (-11.2 points) and Northern (-10.5 points) regions.



Q2. Importance of Choice

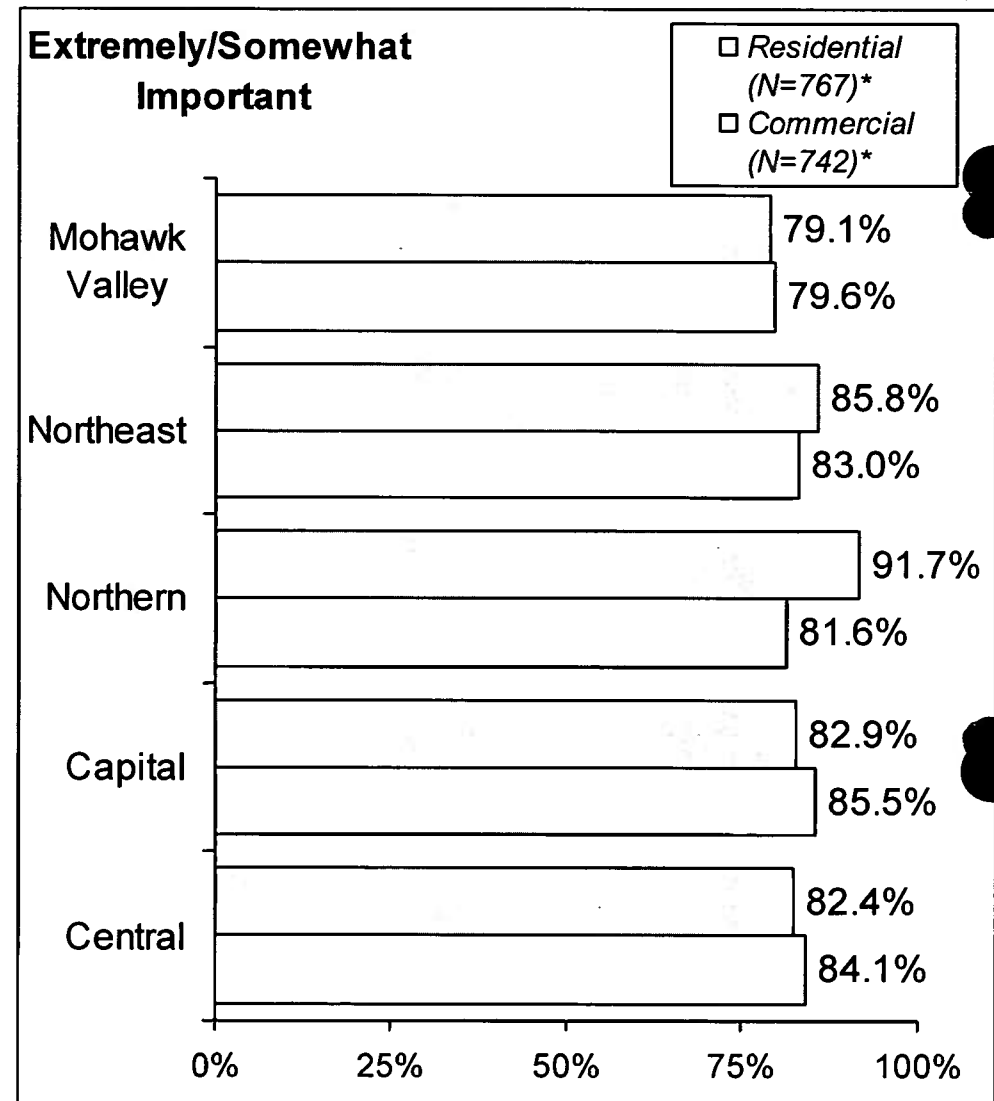
- Both residential (40.5% “extremely important”) and commercial (41.4%) respondents consider choice important.



* Only valid responses were used.

Q2. Importance of Choice by Region

- The largest difference in ratings between the two segments is in Northern region (10.1 percentage points). In most other regions, ratings are fairly similar.



* Only valid responses were used.

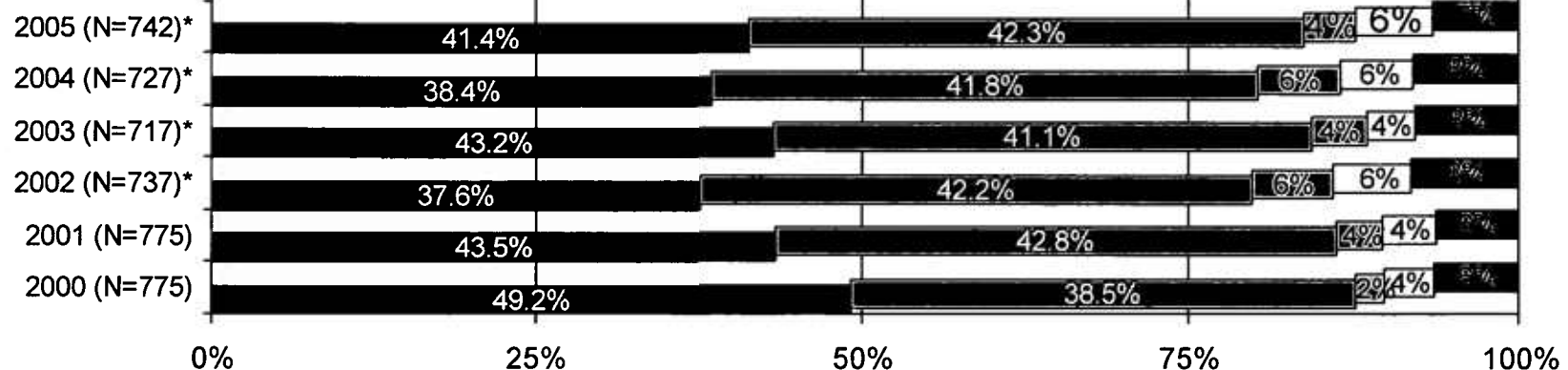
Q2. Importance 2000-2005

- The importance of choice has decreased among residential respondents this year (-12.9 percentage points; "extremely important") and increased among commercial respondents (+3.0 points).

Residential



Commercial

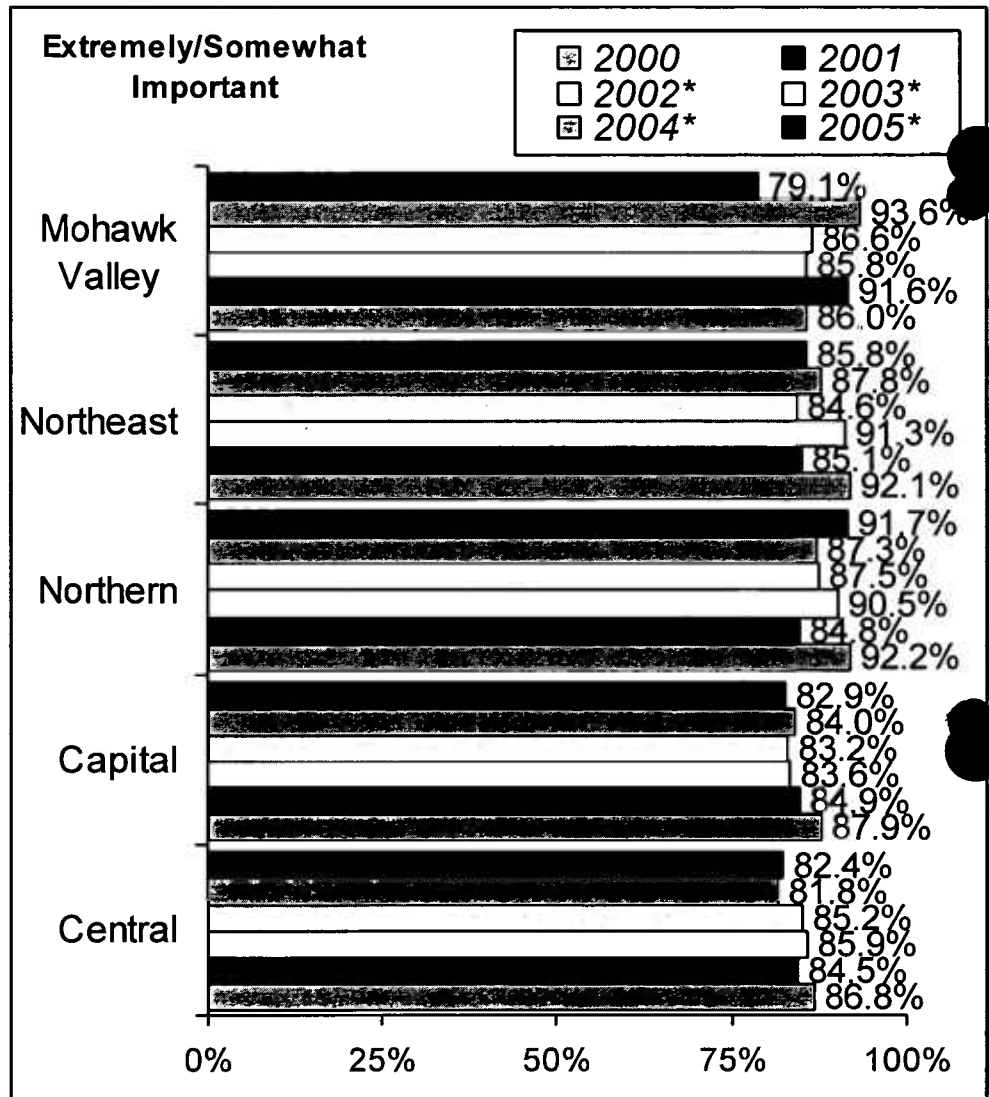


■ Extremely Important ■ Somewhat Important ■ Neither □ Somewhat Unimportant ■ Not at all Important

* Only valid responses were used.

Q2. Residential Importance by Geographical Region 2000-2005

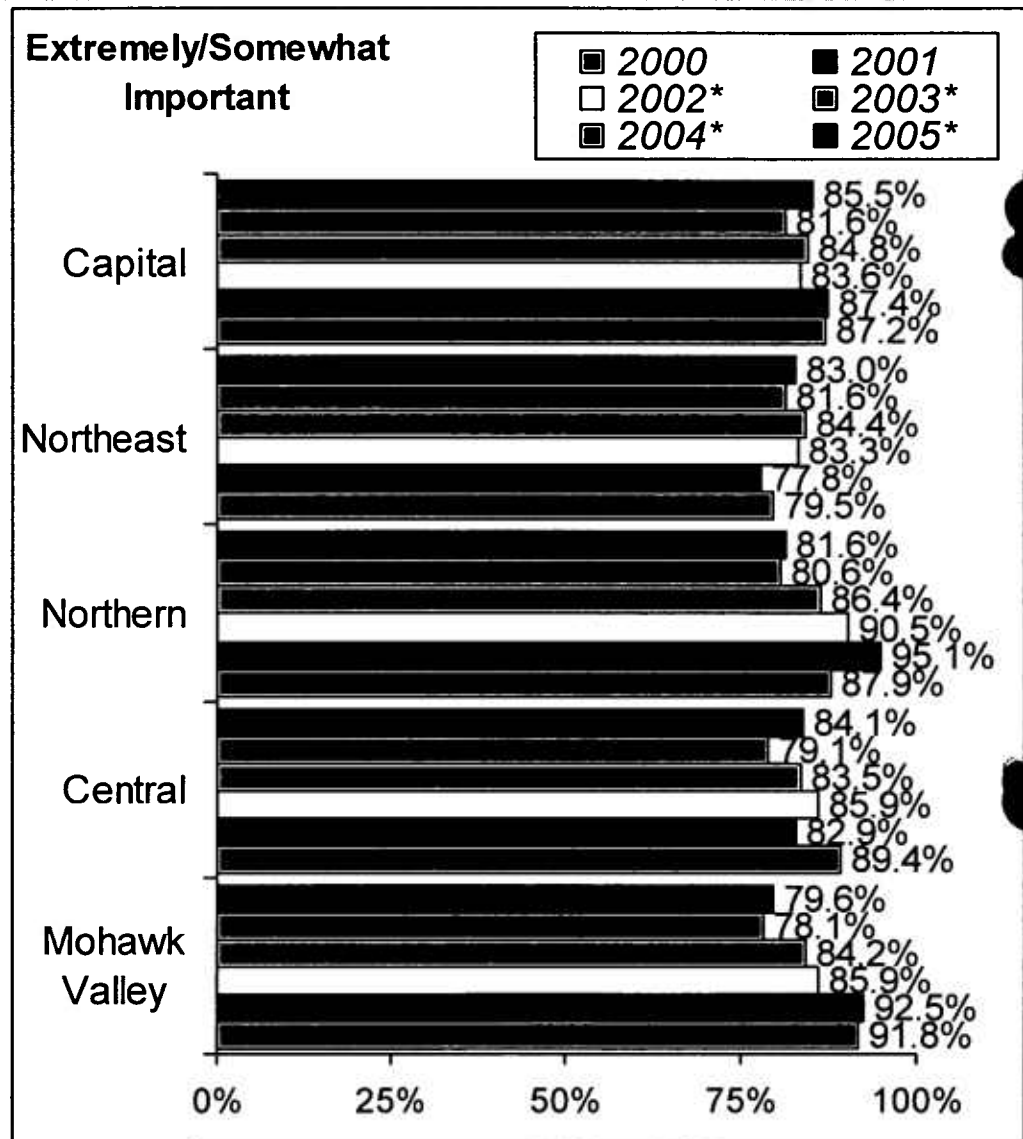
- The importance of choice is highest among residents in the Northern region (91.7% rate “extremely” or “somewhat important”) and lowest in the Mohawk Valley region (79.1%).
- Compared to 2004, importance has decreased in the Mohawk Valley, Northeast and Capital regions.



* Only valid responses were used.

Q2. Commercial Importance by Geographical Region 2000-2005

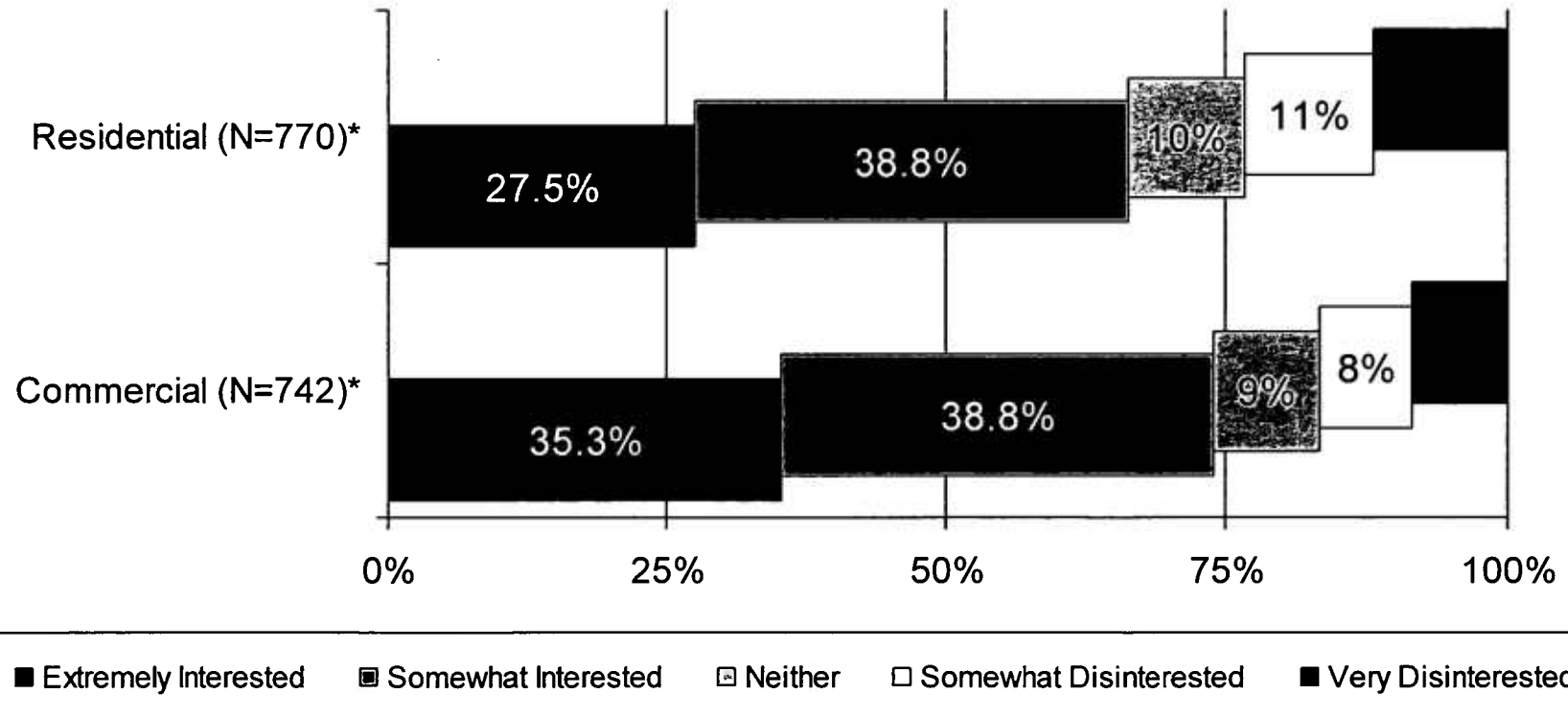
- Choice is very important to the majority of commercial respondents in each region. There is not much difference by geographic area.
- The importance of choice has increased in all regions compared to 2004.



* Only valid responses were used.

Q3. Interest in Choice

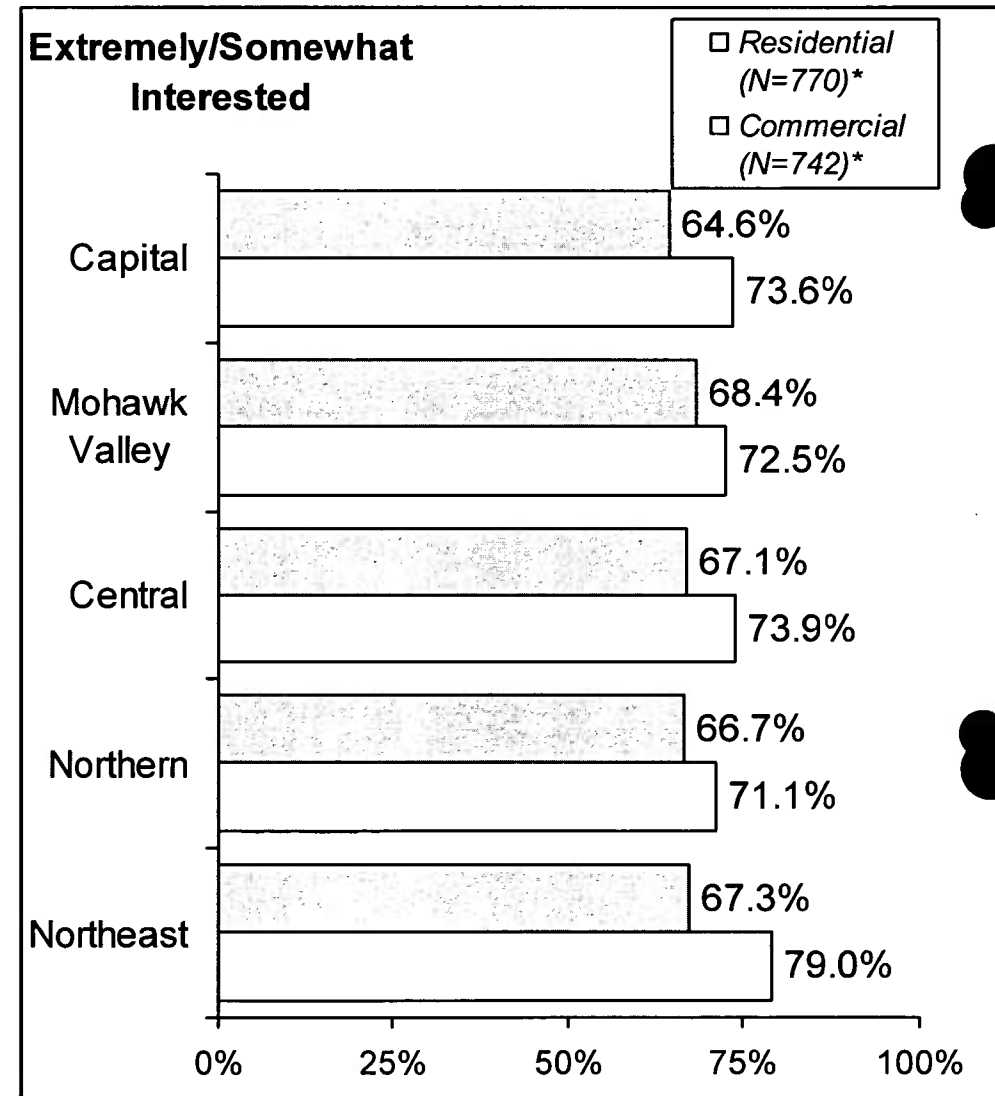
- More than one-fourth of residential (27.5%) and one-third commercial (35.3%) respondents are extremely interested in natural gas retail competition.



* Only valid responses were used.

Q3. Interest in Choice by Region

- Among residential respondents, the Mohawk Valley region is the most interested (68.4%) and the Capital region is the least interested (64.6%) in choice.
- Commercial respondents in the Northeast (79.0%) region are the most interested in choice and the least interested are in the Northern region (71.1%).
- In all regions, commercial respondents express more interest in choice than residential respondents.

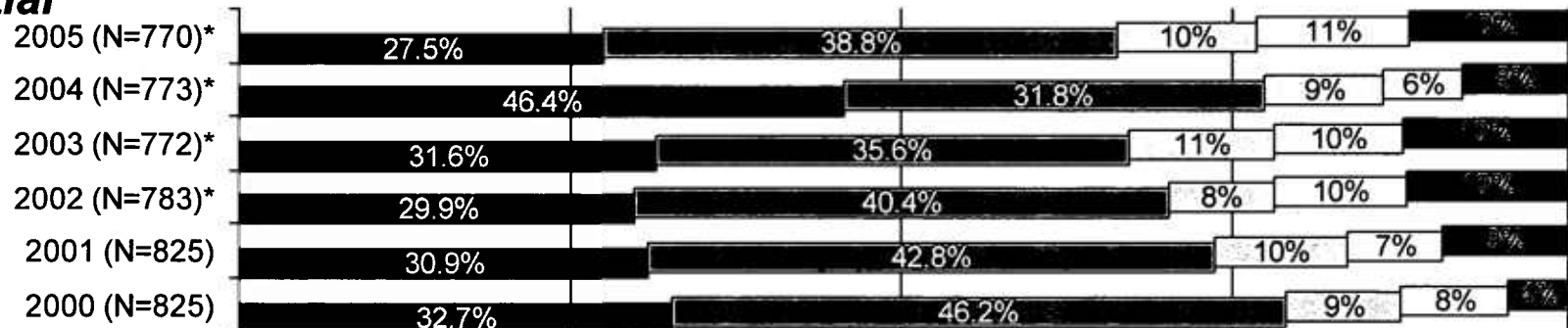


* Only valid responses were used.

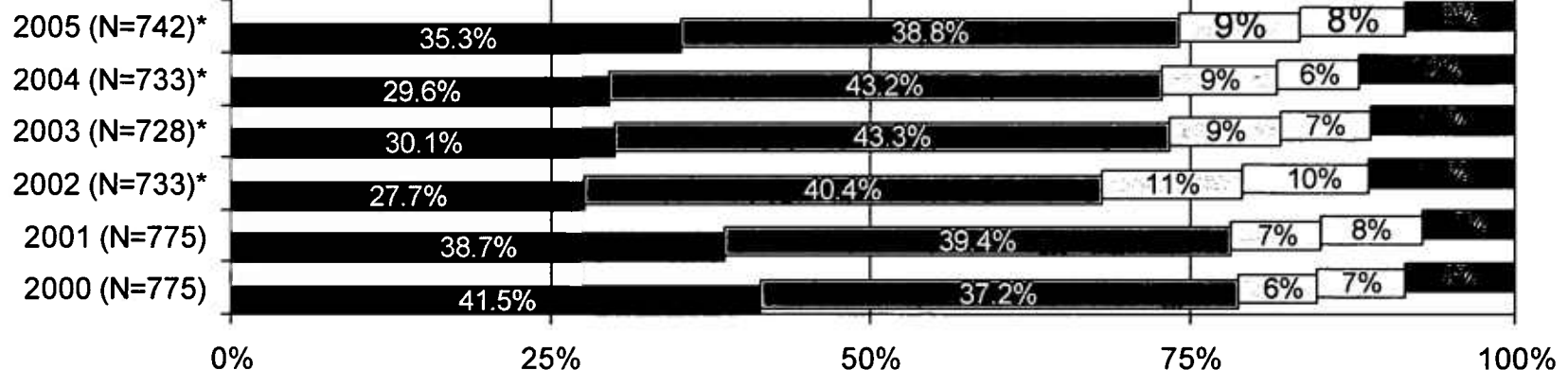
Q3. Interest in Choice 2000-2005

- Interest in choice has decreased among Residential respondents this year (-18.9 percentage points; "extremely interested"). Interest among Commercial customers, however, has increased this year (+5.7 points)

Residential



Commercial

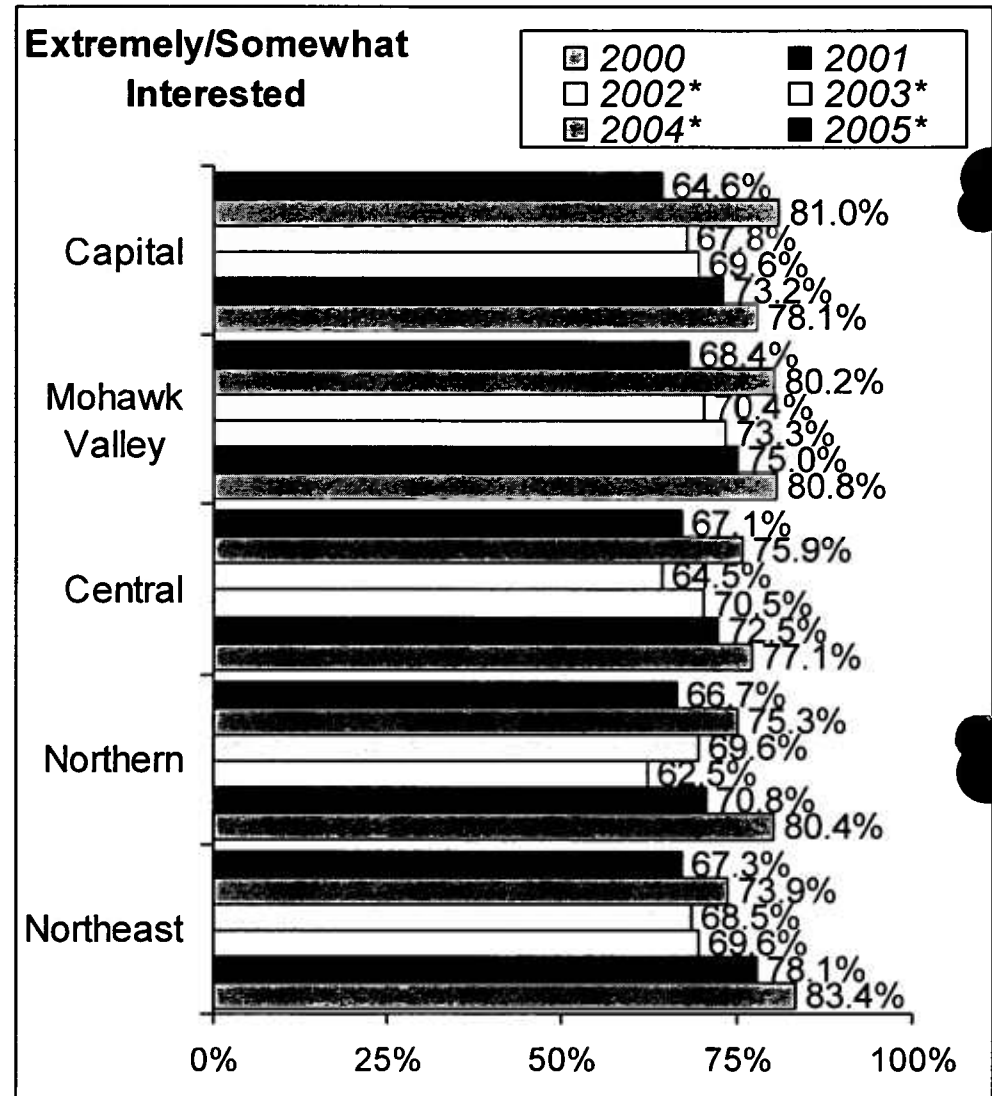


☒ Extremely Interest
 ☒ Somewhat Interested
 ☐ Neither
 ☐ Somewhat Disinterested
 ☒ Very Disinterested

* Only valid responses were used.

Q3. Residential Interest by Geographical Region 2000-2005

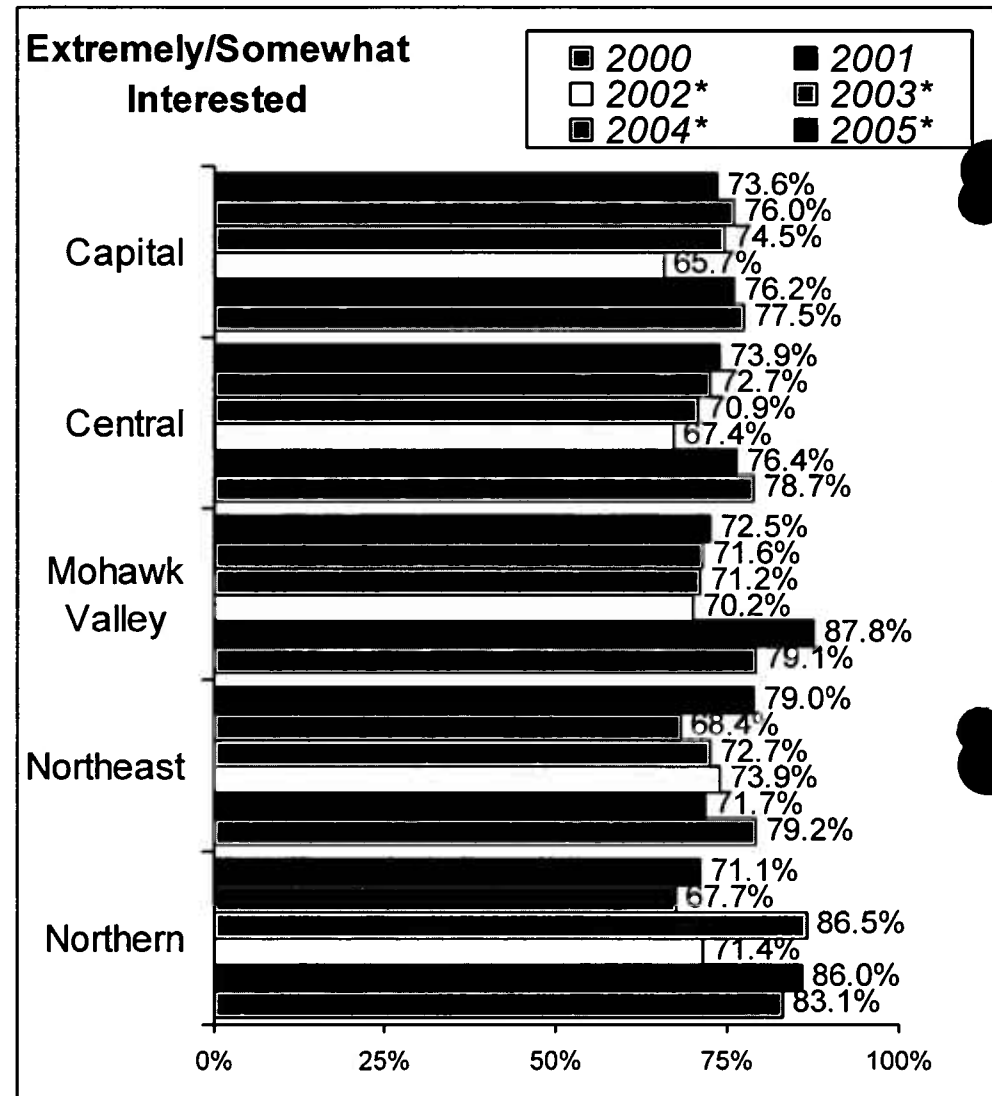
- Residential interest decreased in all regions compared to 2004. The largest decrease was in the Capital region (-16.4 percentage points).
- The 2005 ratings are fairly similar across regions with the Mohawk Valley region with the highest level of interest (68.4%).
- All regions continue to fall short of 2000 levels.



* Only valid responses were used.

Q3. Commercial Interest by Geographical Region 2000-2005

- The Northeast region has the highest percentage of commercial customers (79.0%) who are "somewhat" or "very interested" in retail competition in 2005.
- Interest in choice increased this year in all regions except Capital region (-2.4 points).

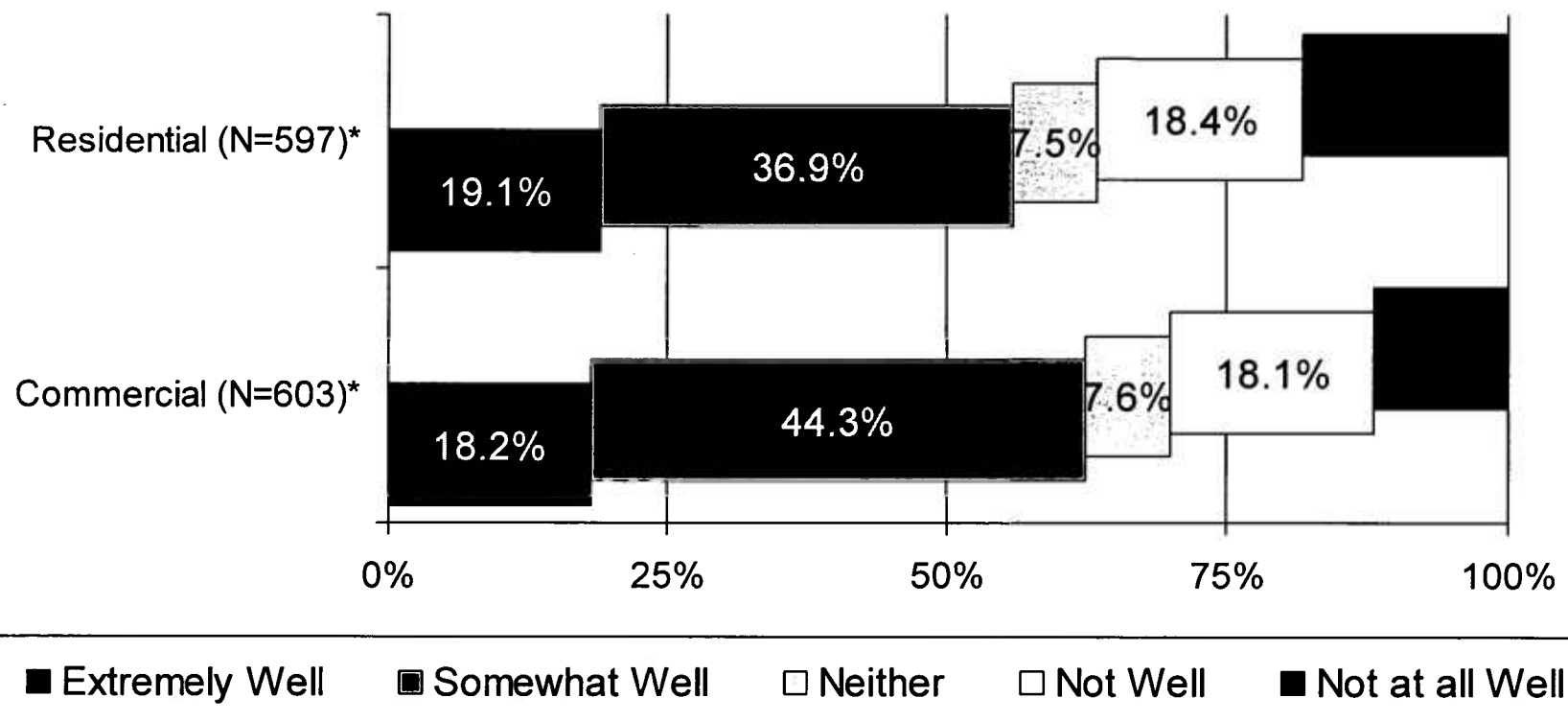


* Only valid responses were used.

Understanding of Retail Competition

Q4. Understand How to Switch Suppliers

- Only one in five residential (19.1%) and commercial (18.2%) respondents claim to understand how to switch natural gas suppliers "extremely well." *(The results below are based only on the respondents that answered yes to question #1 (yes, they are aware of competition)).*

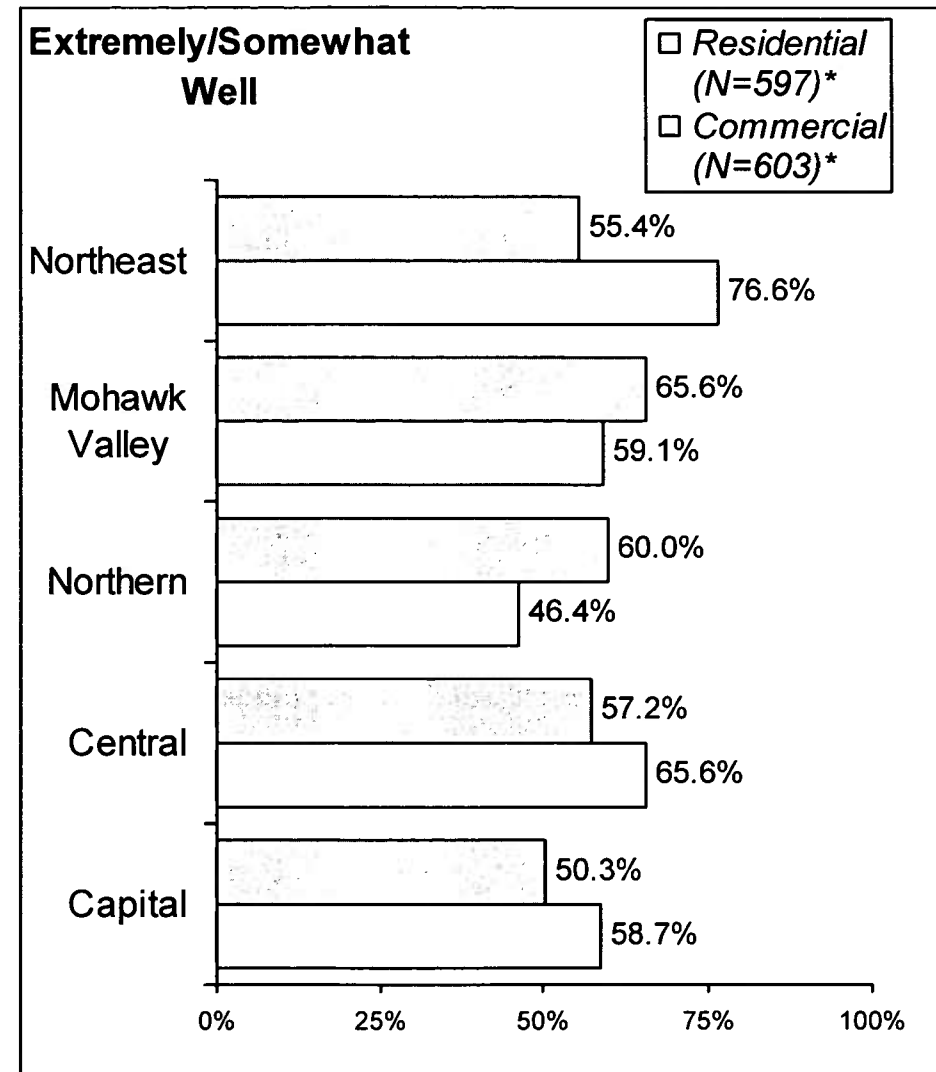


* Only valid responses were used.

Q4. Understand How to Switch Suppliers by Region

*Based on customers
Aware of Retail Competition*

- The Mohawk Valley region has the highest percent of residential (65.6%) respondents who understand “extremely” or “somewhat well” how to switch natural gas suppliers.
- The Northeast region has the highest percent of commercial respondents (76.6%) who understand “extremely” or “somewhat well” how to switch natural gas suppliers.

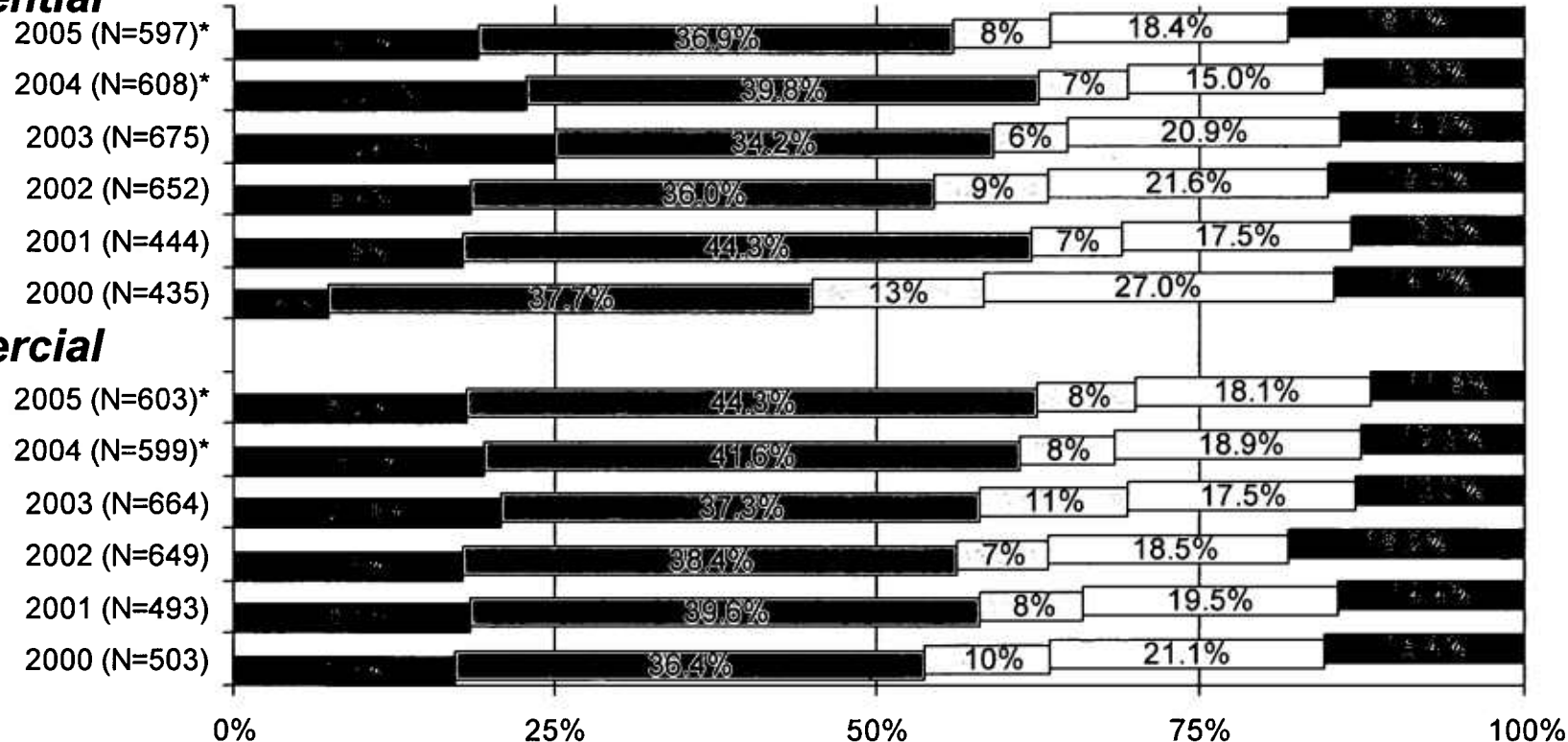


* Only valid responses were used.

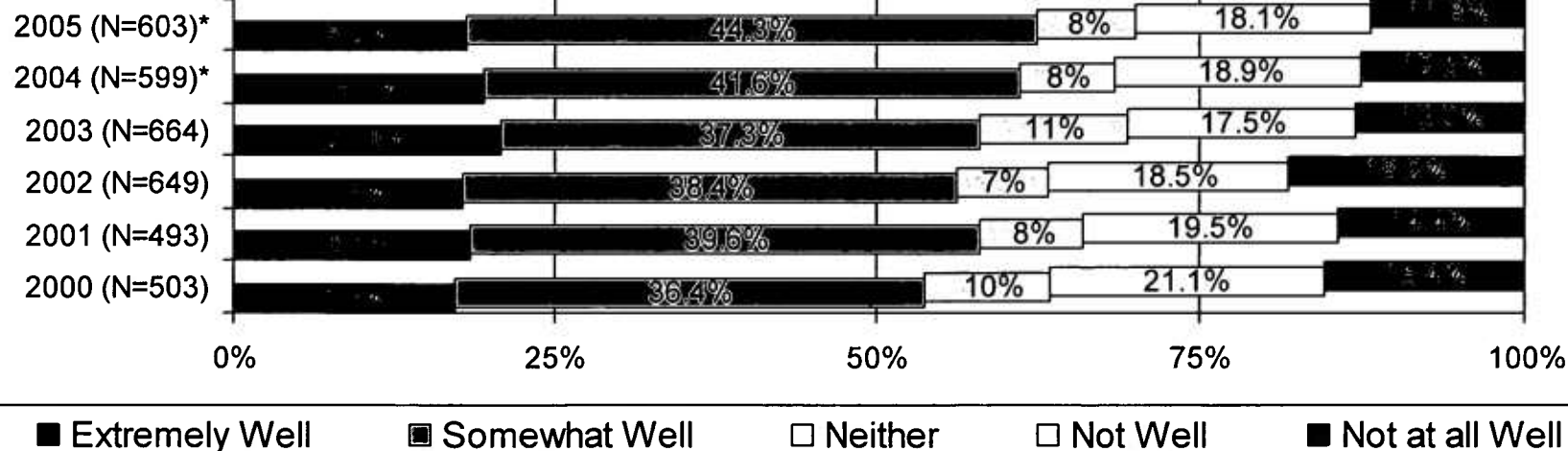
Q4. Understand How to Switch Suppliers 2000-2005

- The percentage of respondents that understating how to switch natural gas suppliers extremely well has decreased among Residential (-3.6 points) and Commercial (-1.3 points) respondents this year.

Residential

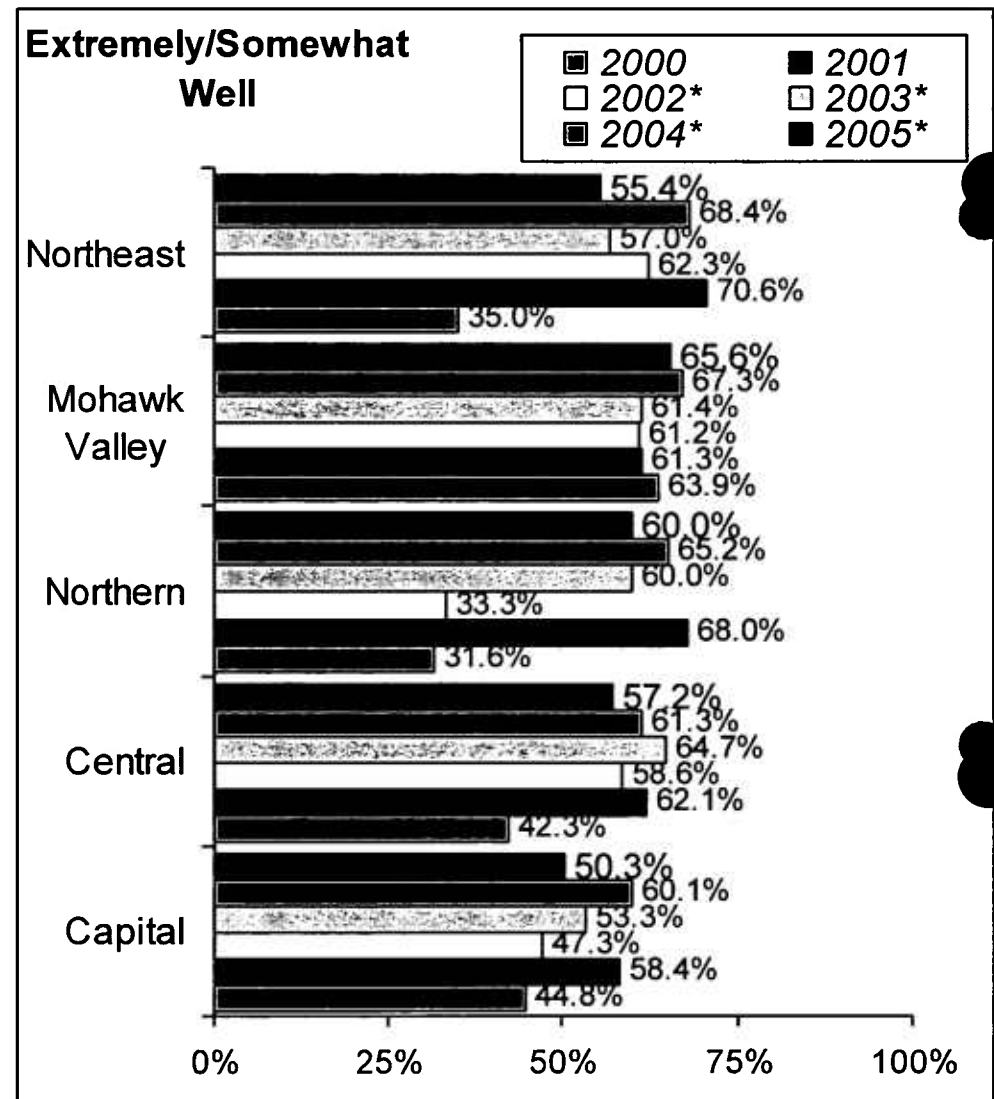


Commercial



Q4. Residential Understand Choice by Geographical Region 2000-2005

- Residential Understanding decreased in all regions between 2004 and 2005 (understand “Extremely” or “Somewhat” well).
- The largest declines in awareness occurred in the Northeast (-13 points) and Capital (-9.8 points) regions.

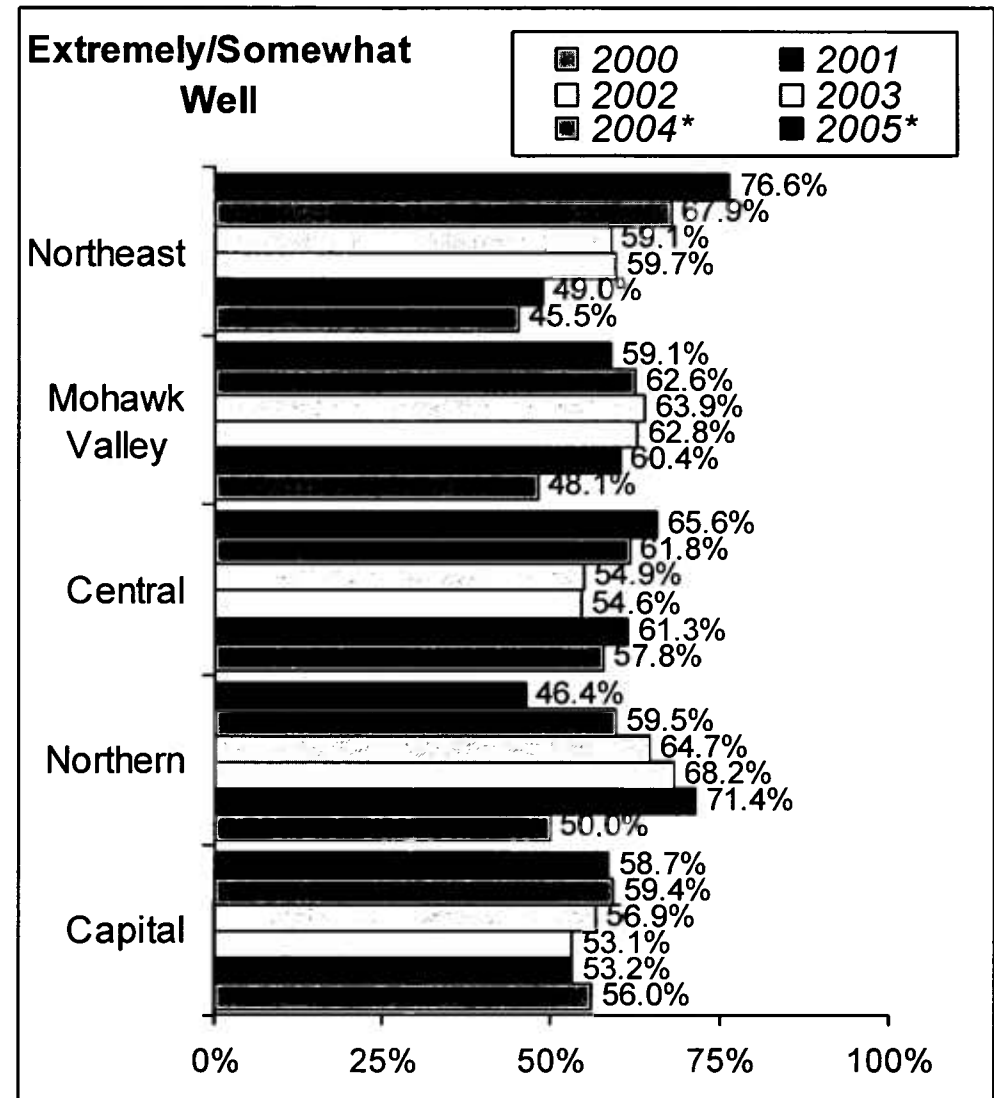


* Only valid responses were used.

**These percents are based only upon the respondents that are aware of competition.

Q4. Commercial Understand Choice by Geographical Region 2000-2004

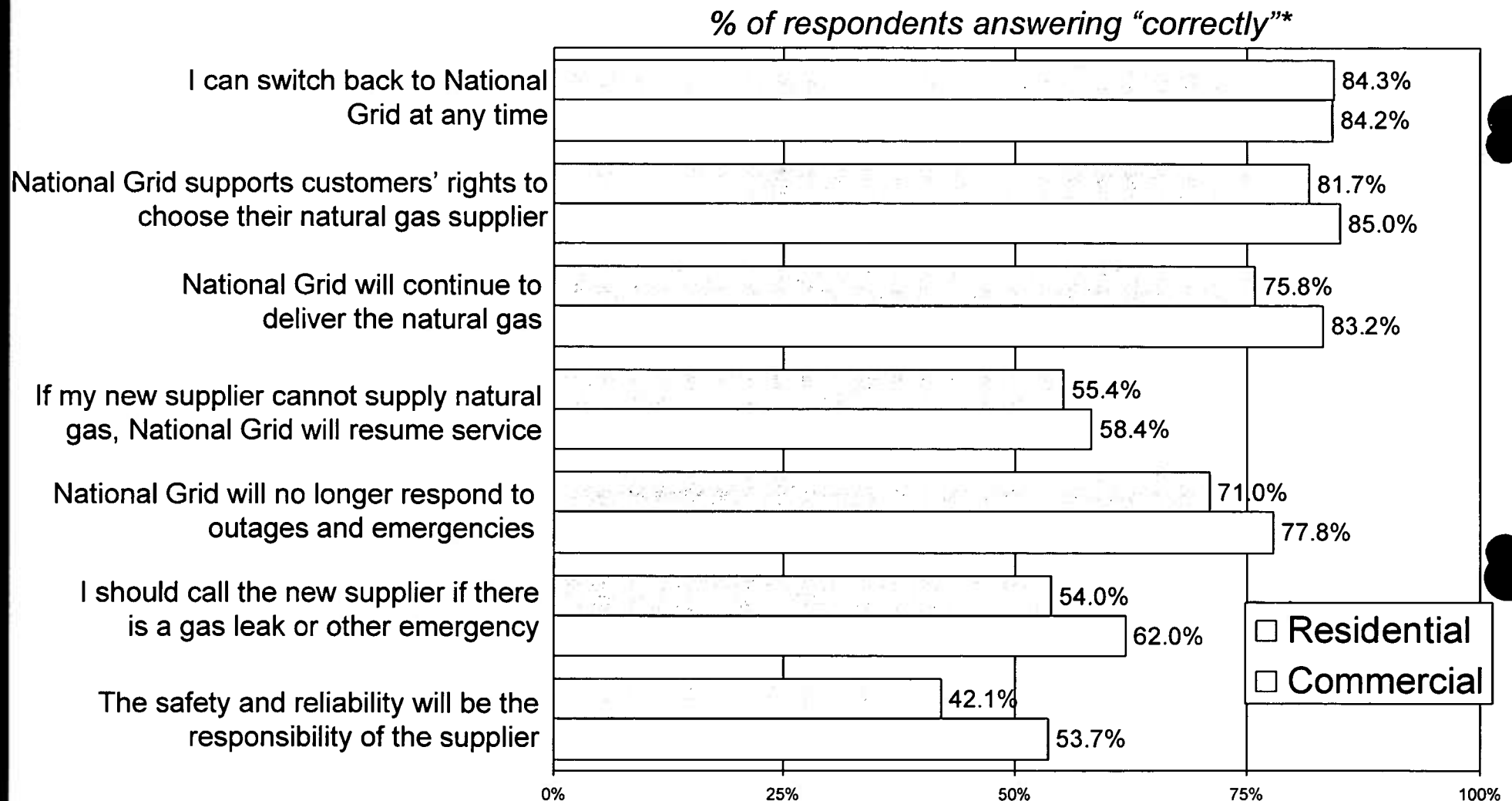
- Another strong increase this year in understanding in the Northeast region (+8.7 percentage points) makes the Northeast region the highest in terms of understanding among its commercial customers.
- Understanding in the Northern region continues to decline. This is the fourth decline in a row; every year since 2001.



* Only valid responses were used.

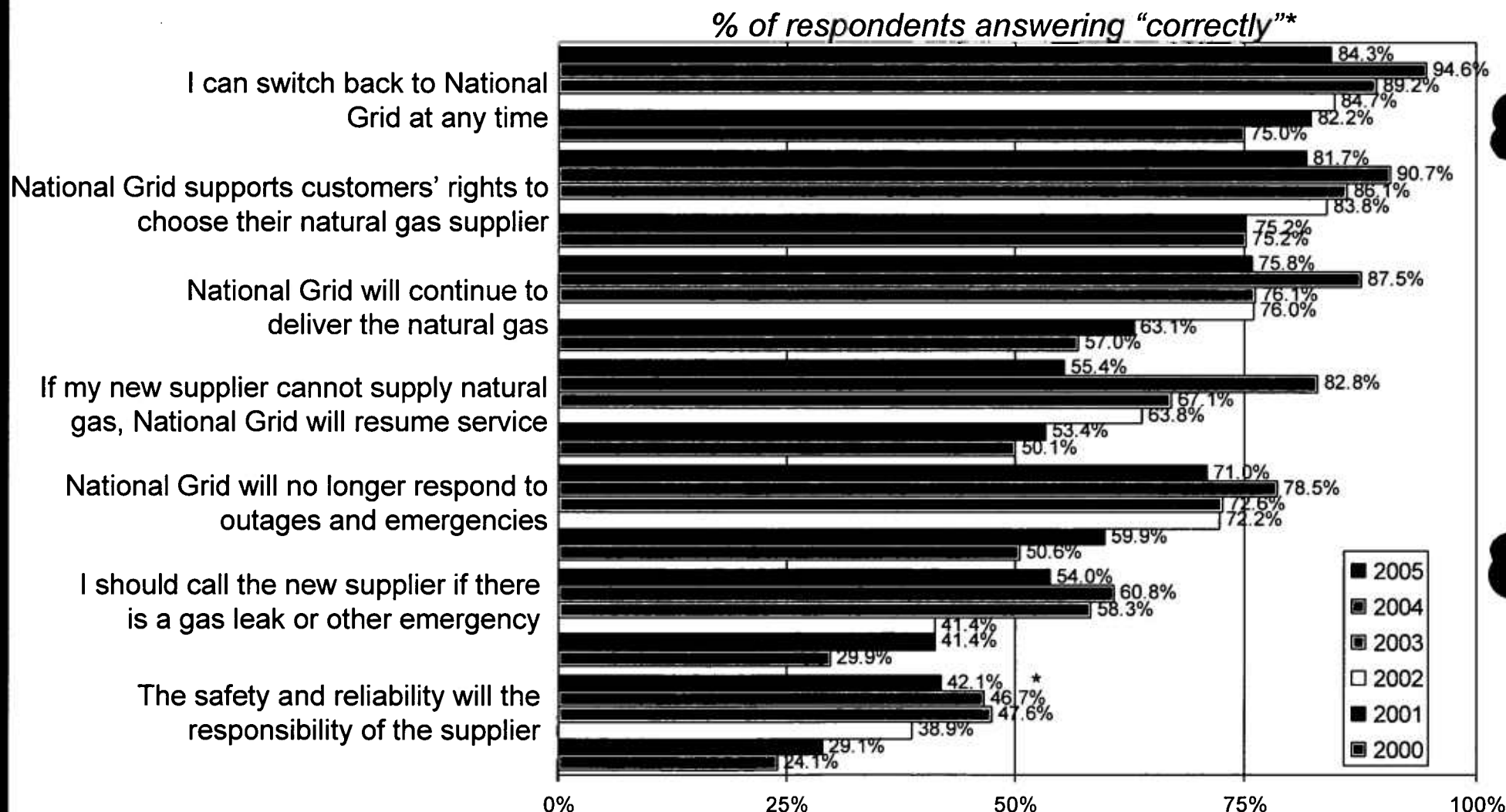
**These percents are based only upon the respondents that are aware of competition.

Q5. Understanding Retail Competition



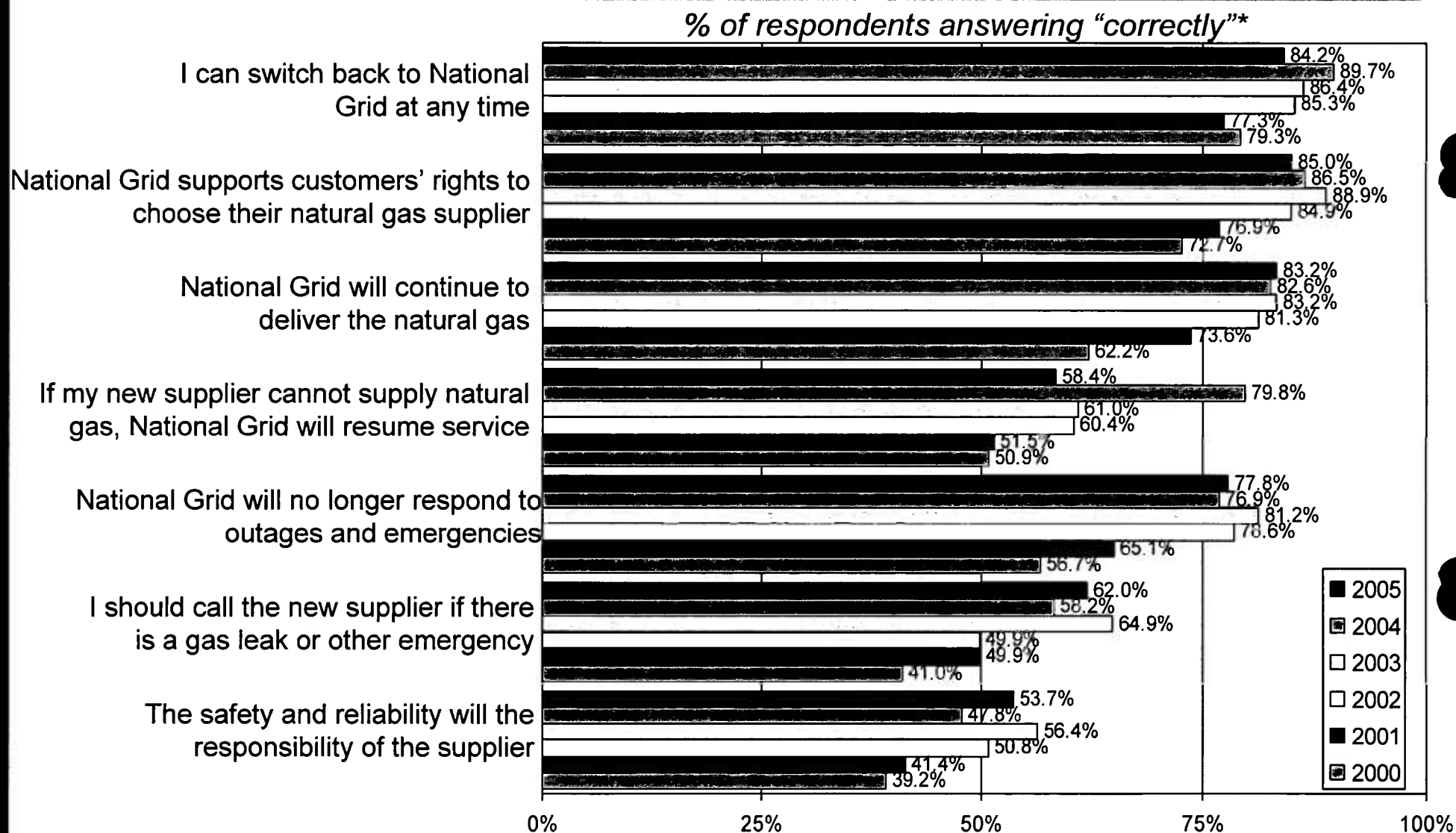
*These percents are based only upon the respondents that are aware of competition.

Q5. Understanding Retail Competition - Residential



*These percents are based only upon the respondents that are aware of competition.

Q5. Understanding Retail Competition - Commercial



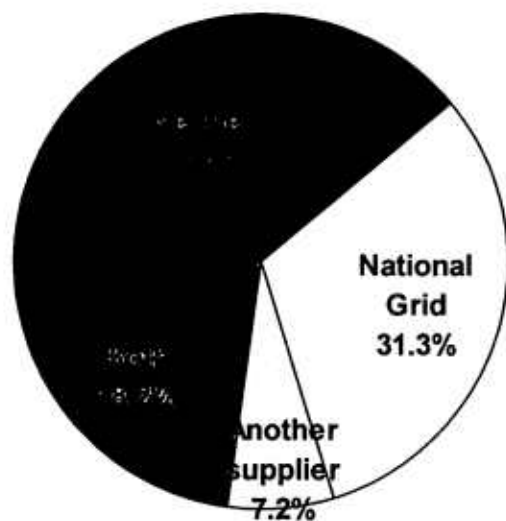
*These percents are based only upon the respondents that are aware of competition.

Retail Competition Communications

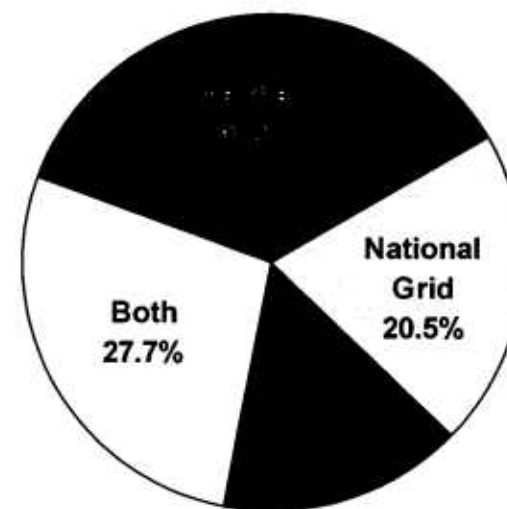
Q6a-b. Have you heard or read anything from....about switching your natural gas supplier

- 31.3% of residential respondents have heard about retail competition from National Grid. 7.2% of residential respondents have heard from other natural gas suppliers.
- 20.5% of commercial respondents have heard about retail competition from National Grid. 15.8% of commercial respondents have heard from another natural gas supplier.

Residential

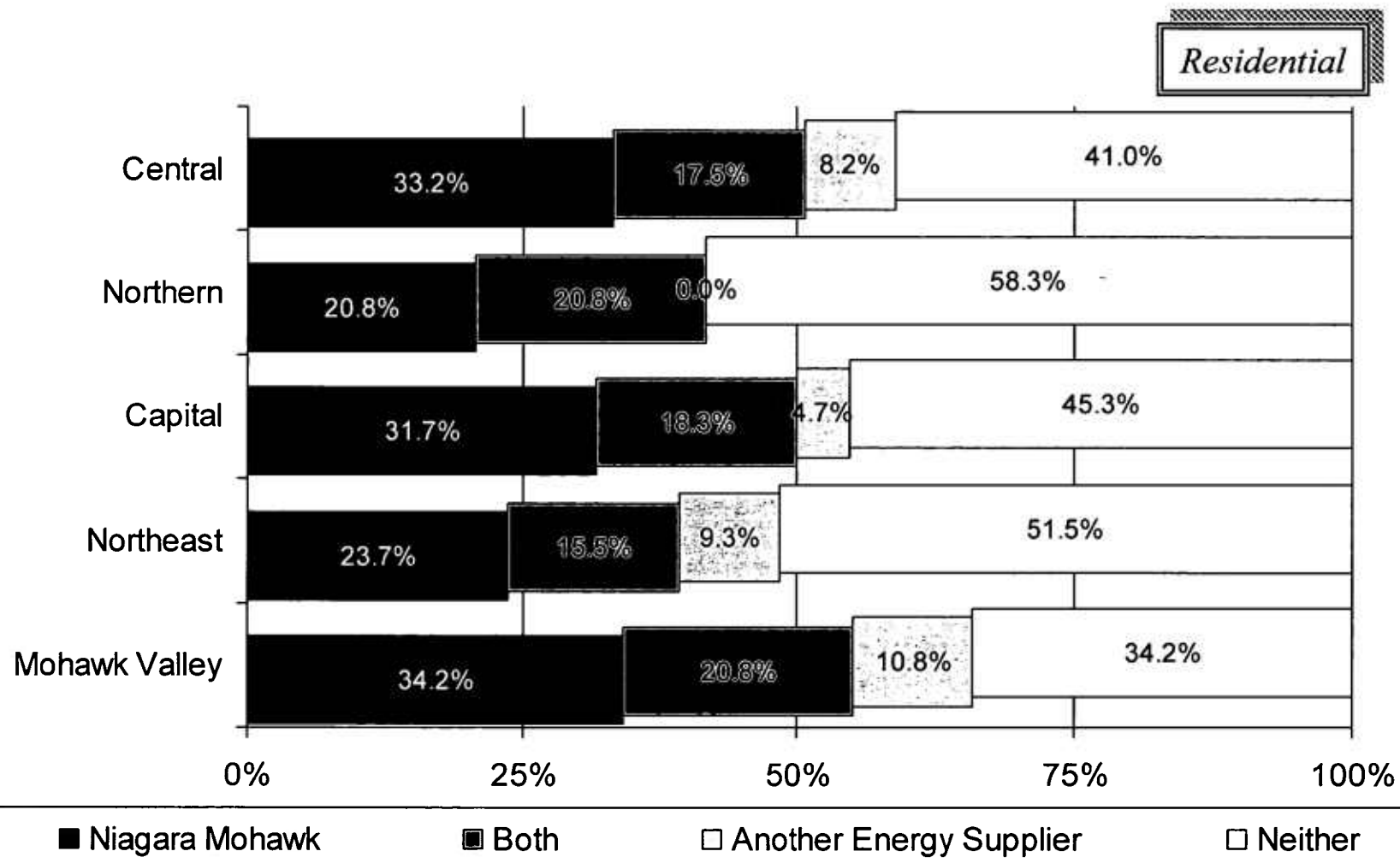


Commercial



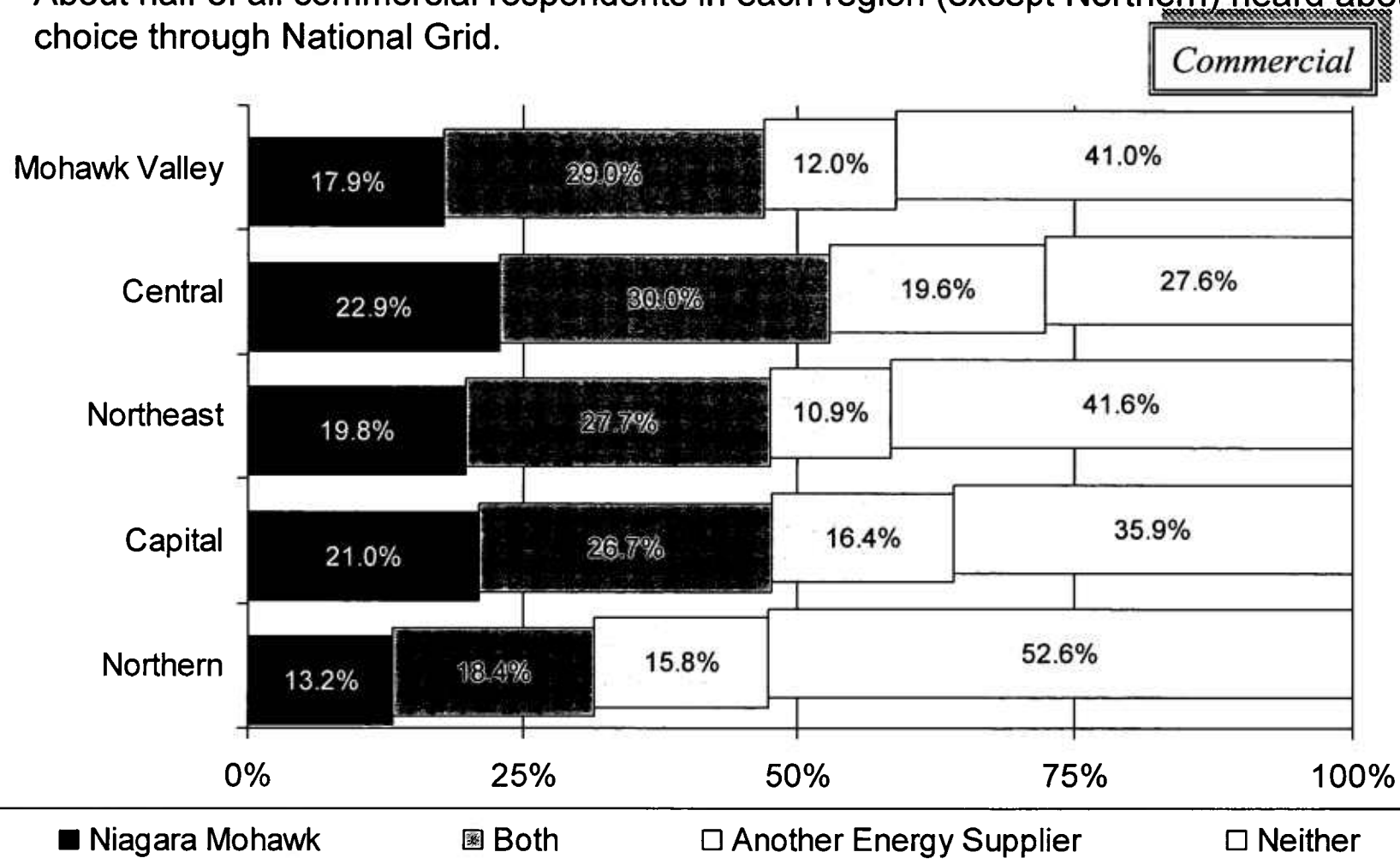
Q6a-b. Have you heard or read anything from....about switching your natural gas supplier - by Region

- In three regions at least half the residents have heard about competition from National Grid.



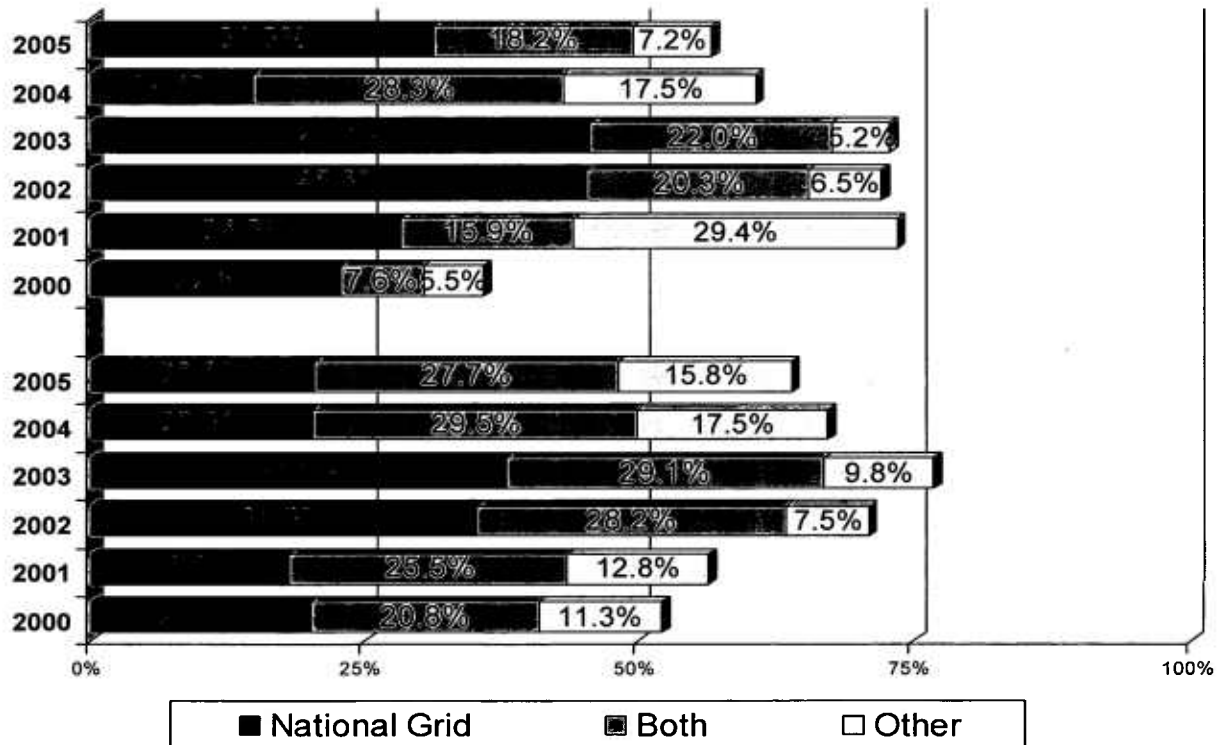
Q6a-b. Have you heard or read anything from....about switching your natural gas supplier - by Region

- About half of all commercial respondents in each region (except Northern) heard about choice through National Grid.



Q6a-b. Have you heard or read anything from....about switching your natural gas supplier 2000-2005

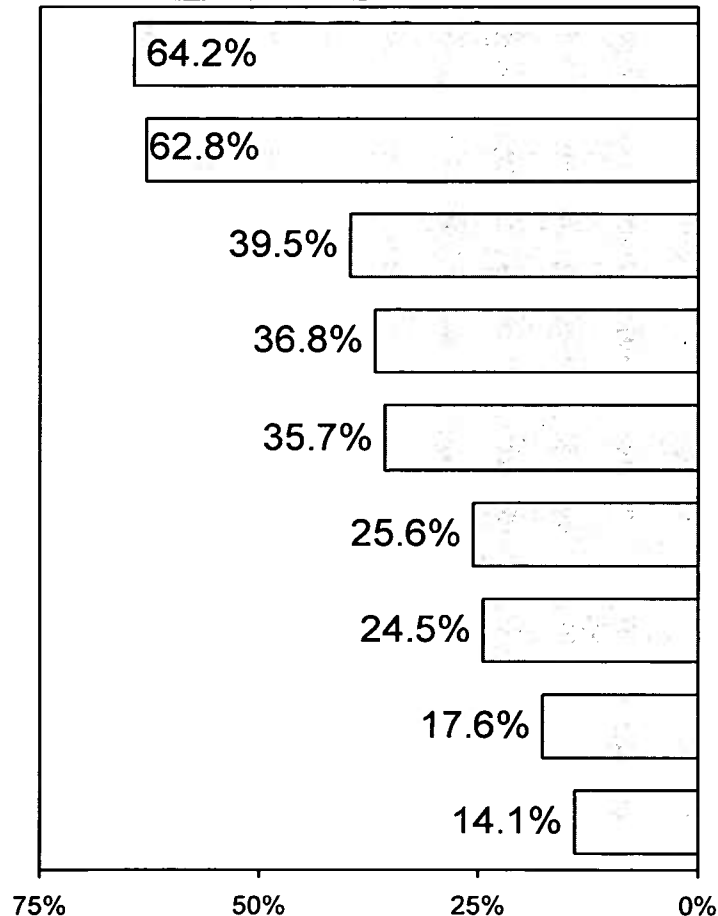
Residential



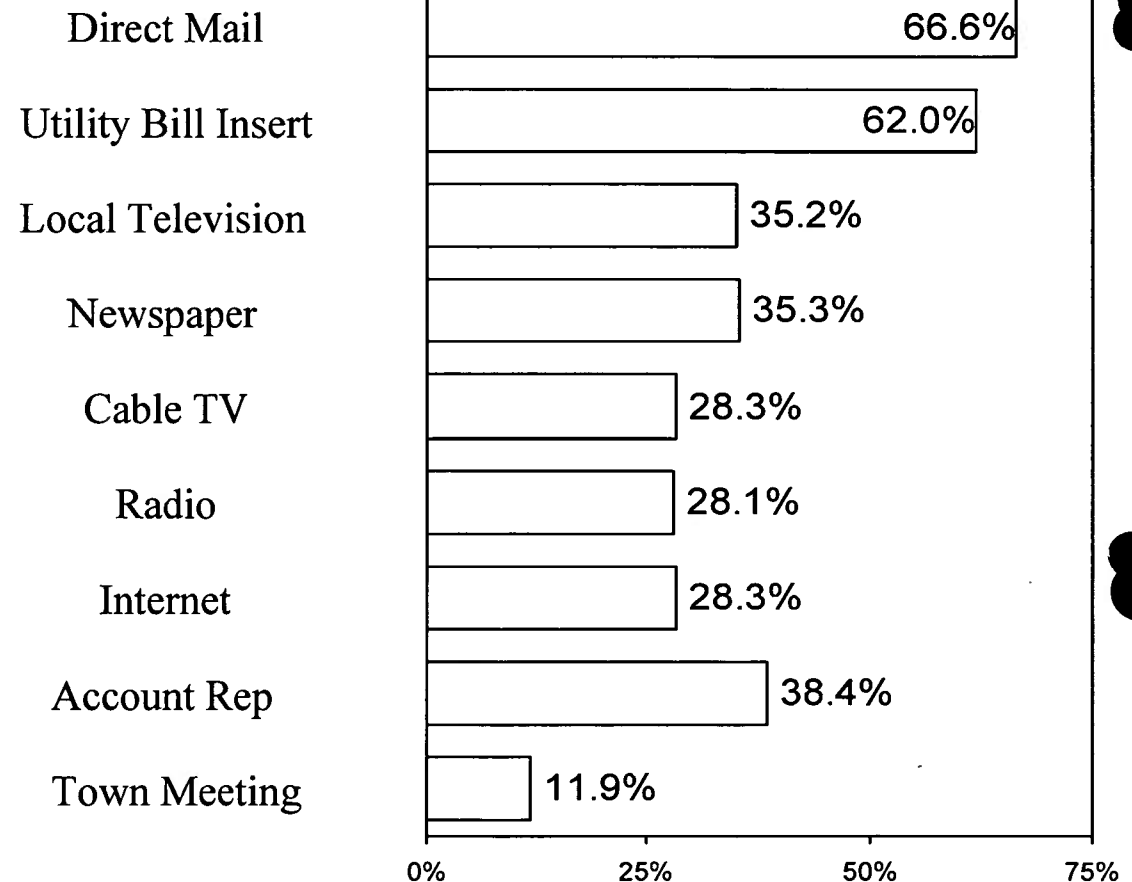
Q6c-o. What are the best ways for National Grid to let you know about switching suppliers?

- Direct mail is the preferred method of obtaining information about switching natural gas suppliers for the largest proportions of both residential (64.2%) and commercial (66.6%) respondents.*

Residential (N=801)

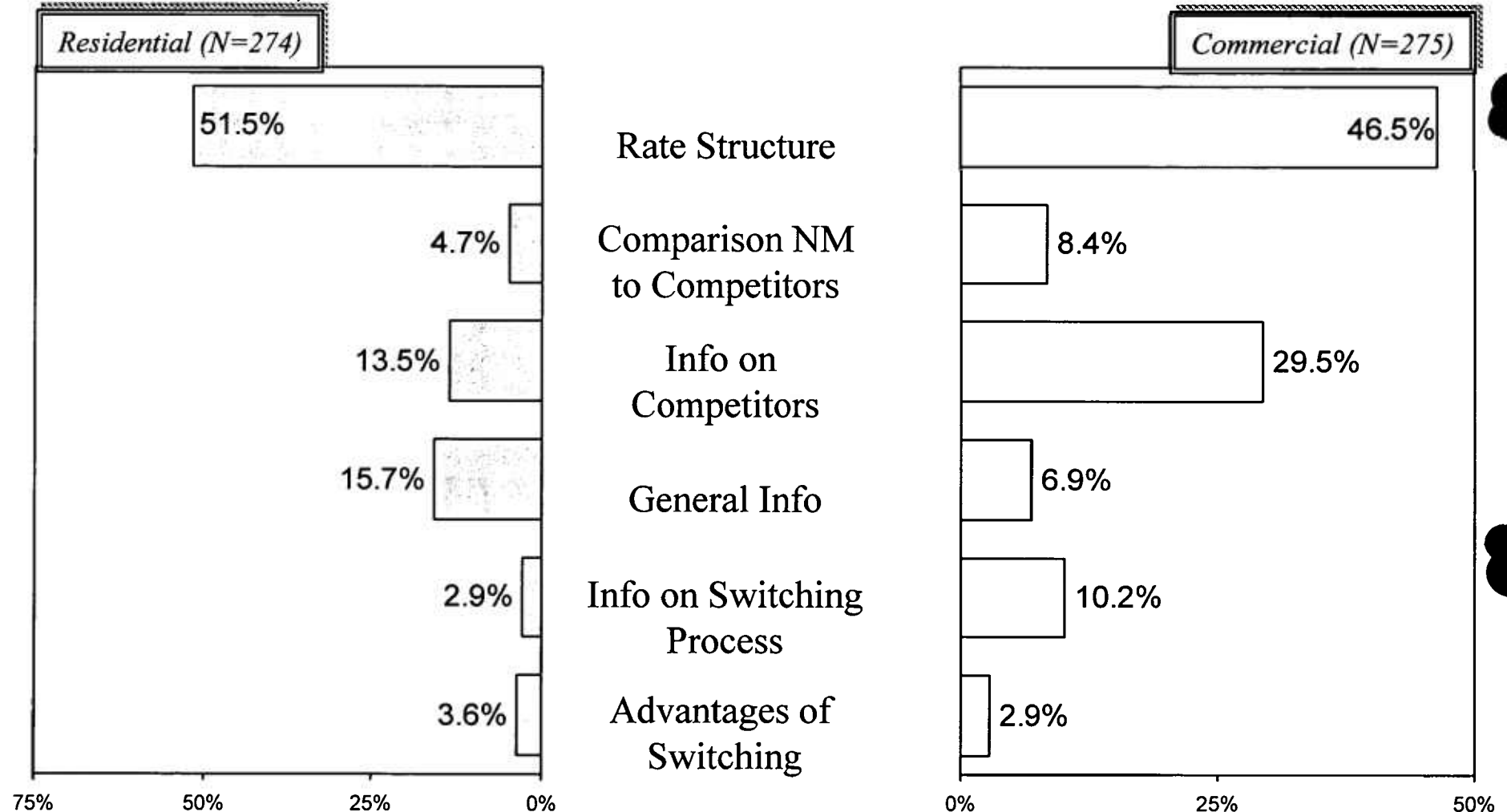


Commercial (N=745)



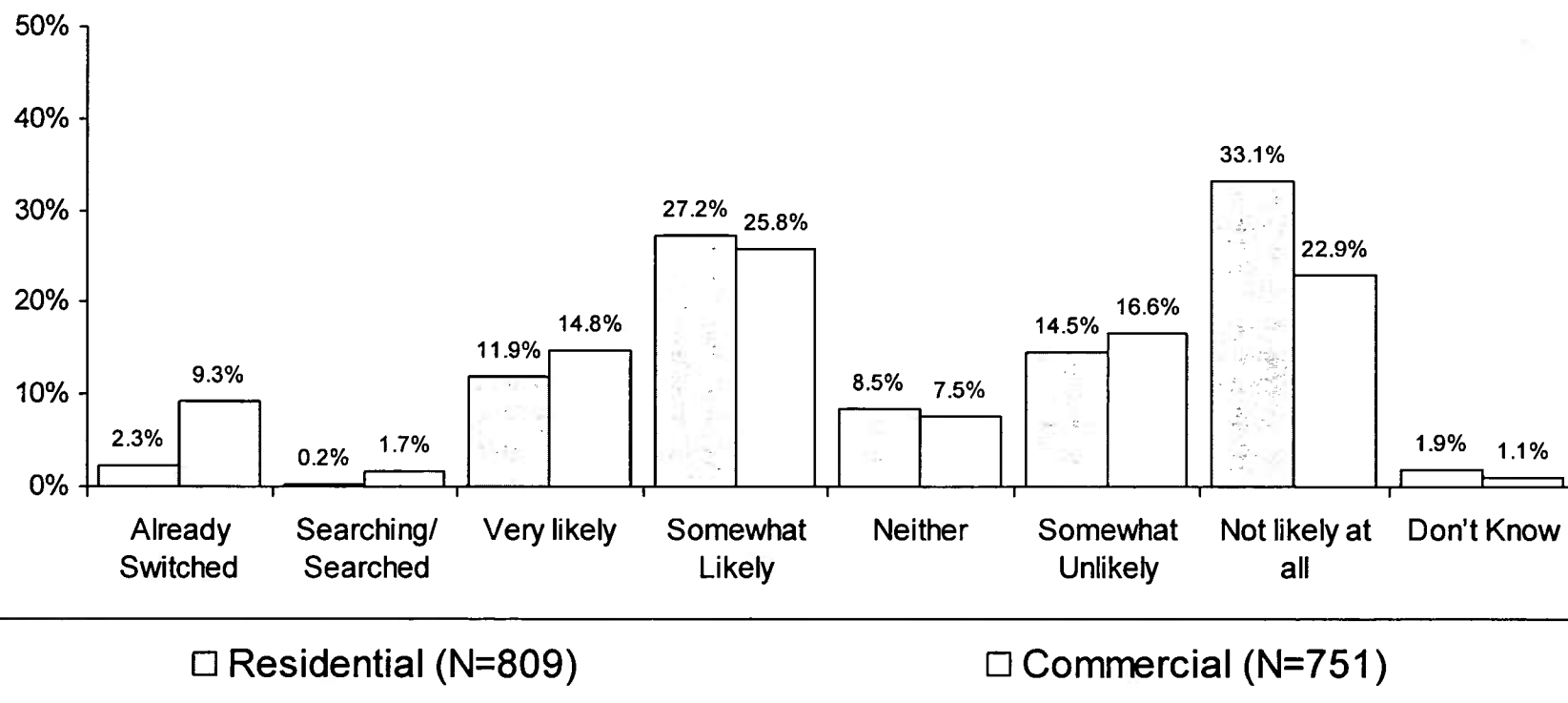
Q7. Is there anything about choosing a supplier that you would like more information on?

- The largest proportions of customers would like to learn more about the rate structure (51.5% residential; 46.5% commercial).*



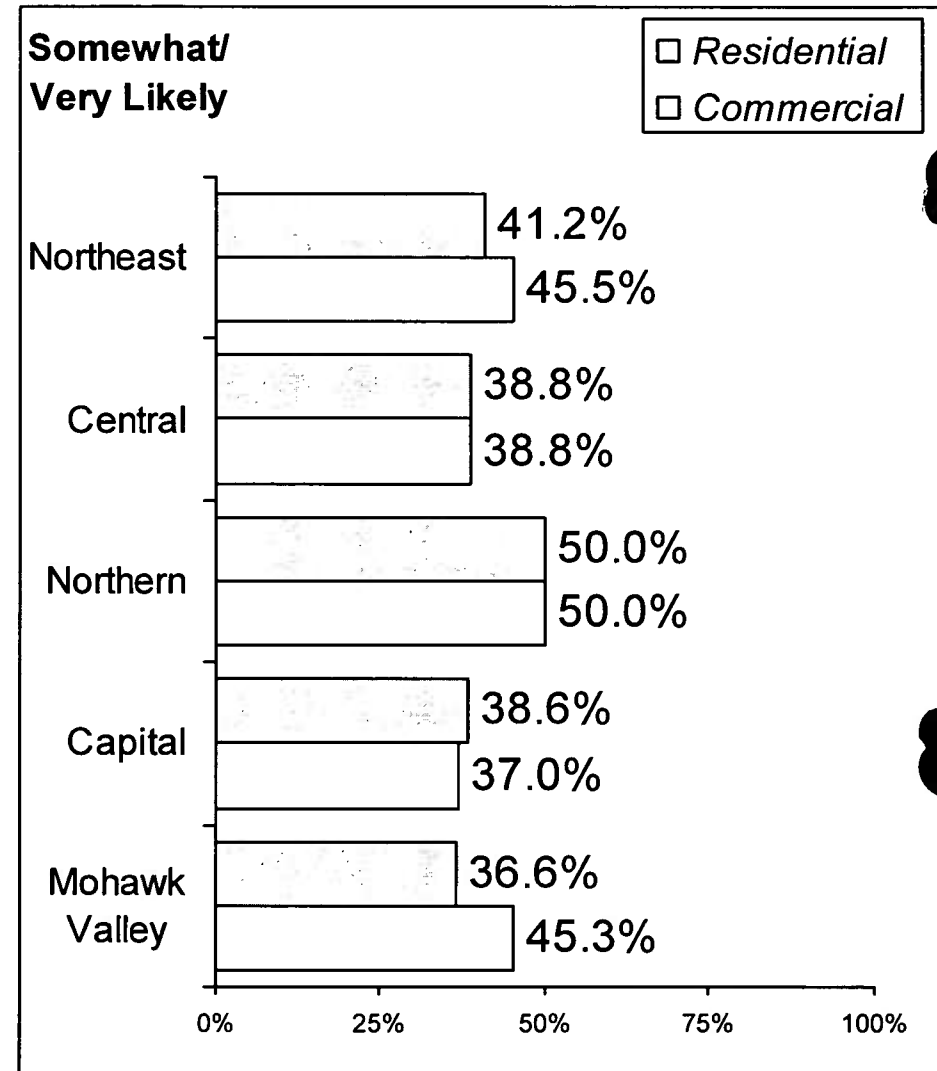
Q8. Likelihood To Search For Another Supplier

- 47.6% of residential and 39.5% of commercial respondents say they are “somewhat unlikely” or “not at all likely” to switch natural gas suppliers.



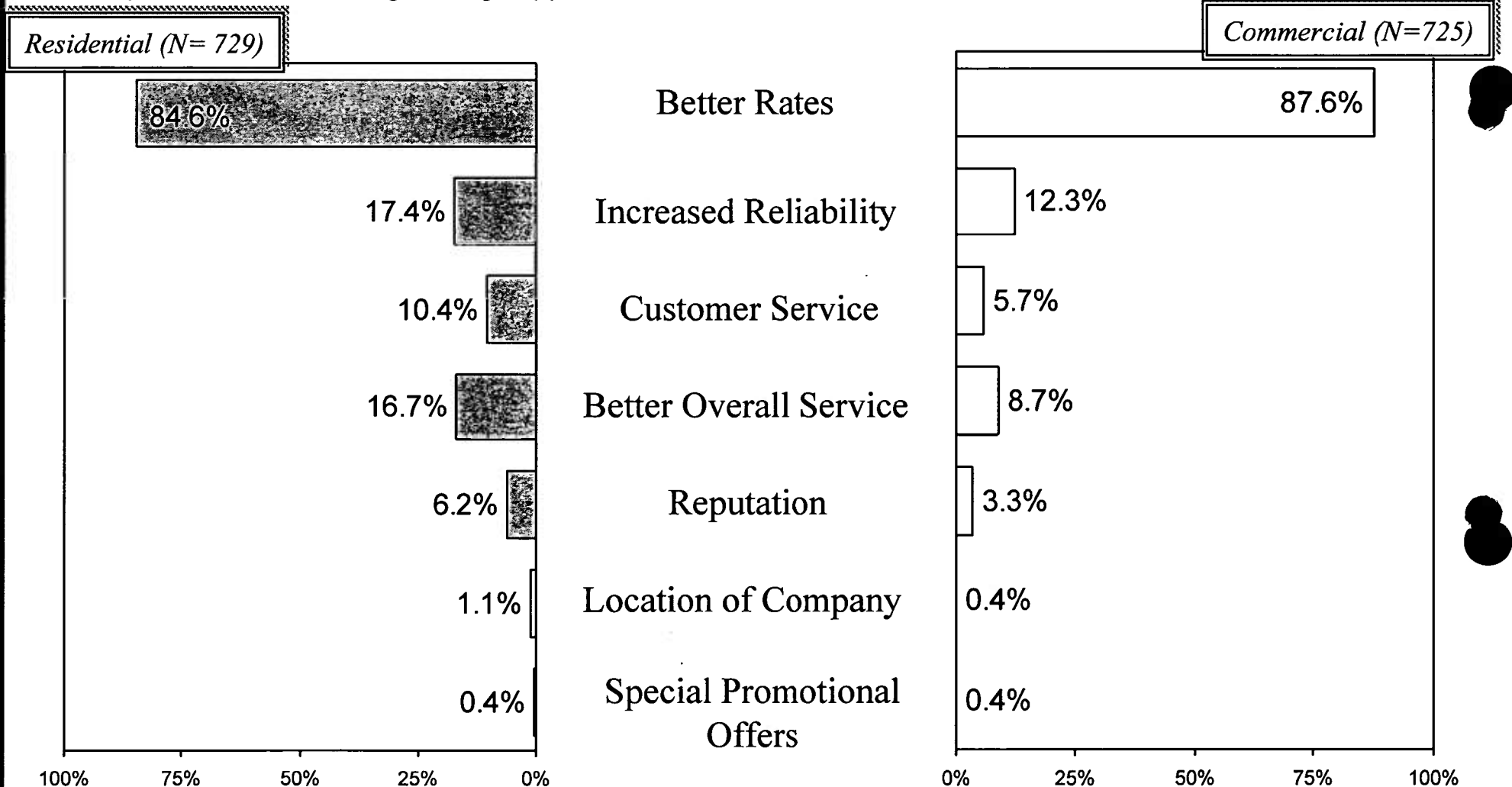
Q8. Likelihood To Search For Another Supplier by Region

- Residential and Commercial customers in the Northern region (50.0%) are much more likely than others to investigate other suppliers.



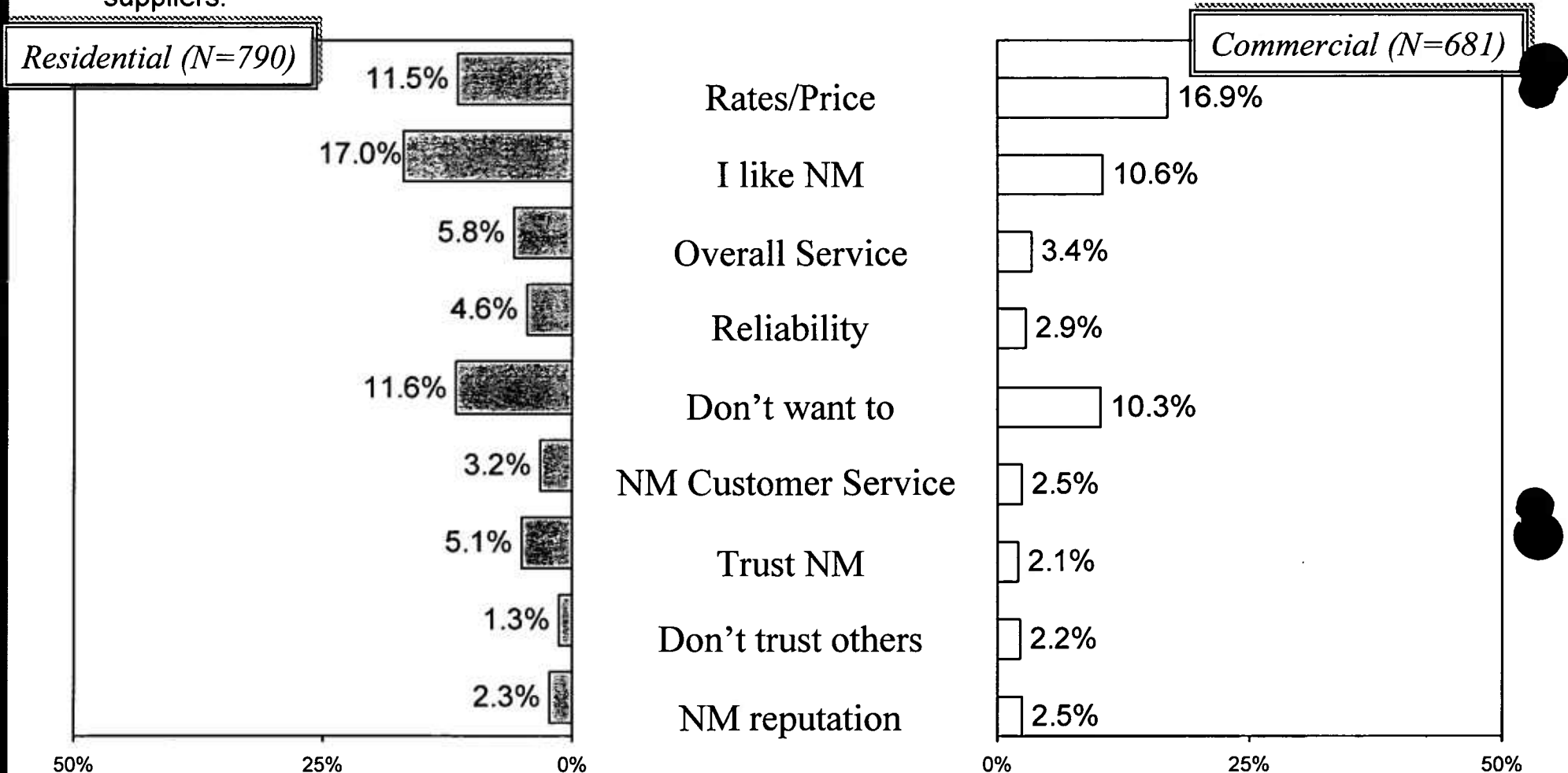
Q8b. What factors are most important to you in choosing one natural gas supplier over another?

- The majority of both residential (84.6%) and commercial (87.6%) respondents claim that better rates would be important when deciding among suppliers.*



Q9. Reasons NOT To Switch Suppliers

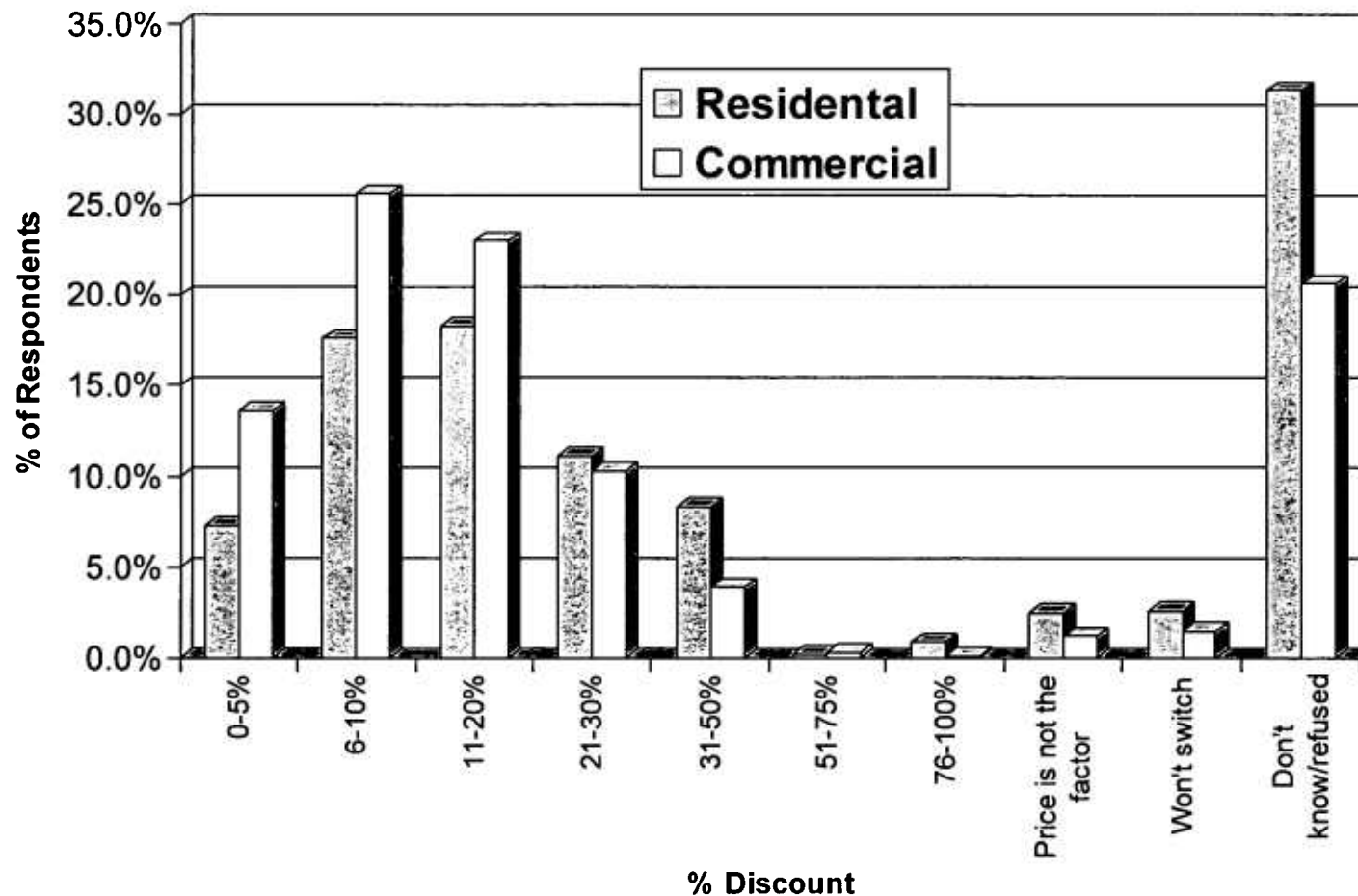
- The largest numbers of residential (17.0%) customers have not switched because they like National Grid. Price is the primary reason why the largest numbers of commercial (16.9%) customers have not switched suppliers.*



*Based on NM customers who have not already switched suppliers.

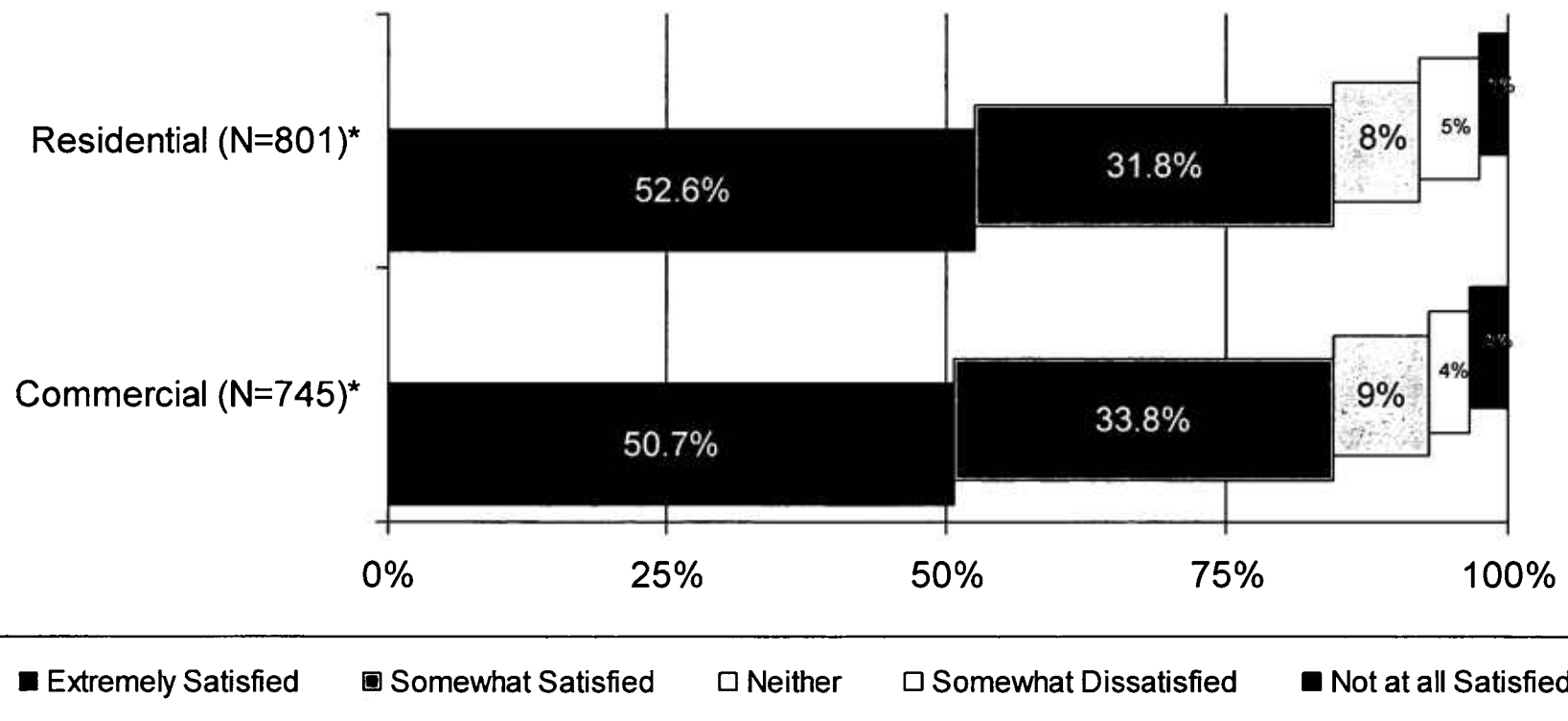
Q10. Amount of Savings Required to Switch

- Commercial customers are more willing to switch suppliers for a smaller discount, compared to residential customers..



Q11. Satisfaction with National Grid

- Most residential (84.4%) and commercial (84.5%) respondents are “somewhat” or “extremely satisfied” with National Grid.

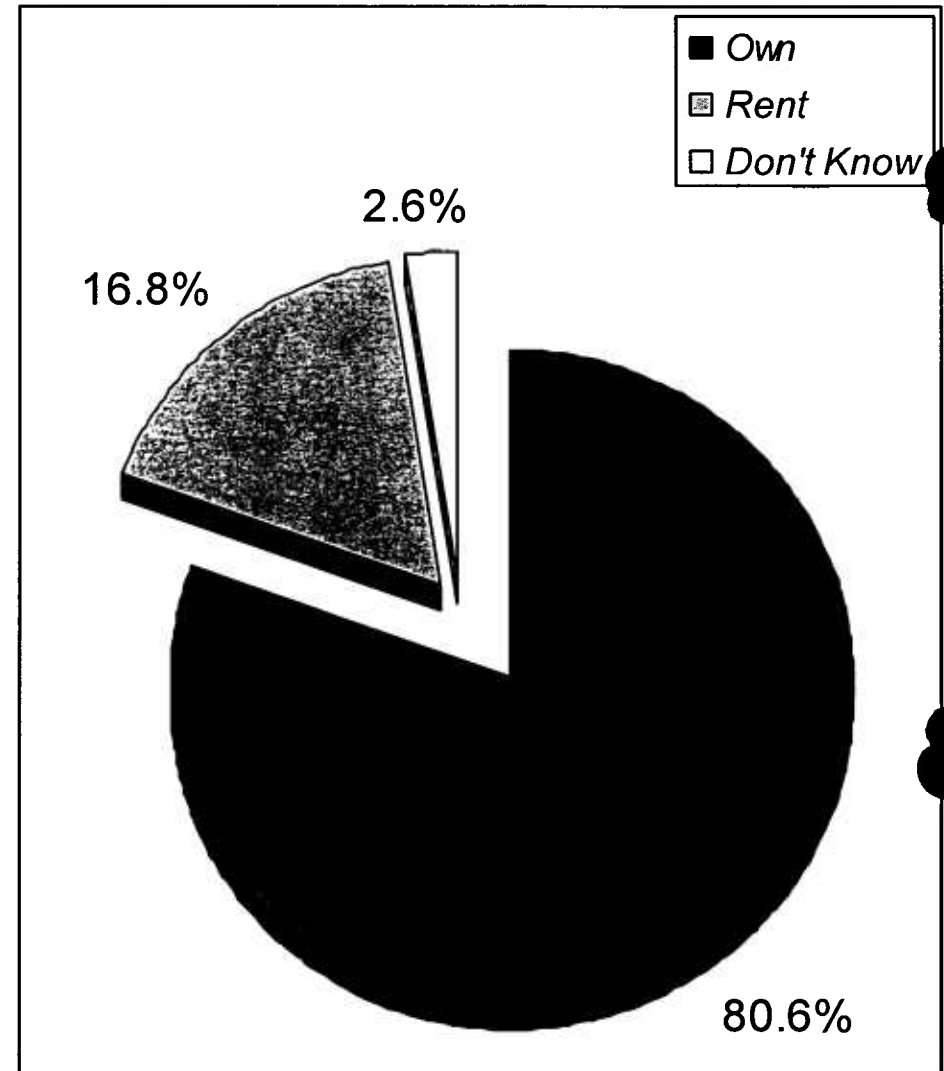


* Only valid responses were used.

Residential Respondent Profile

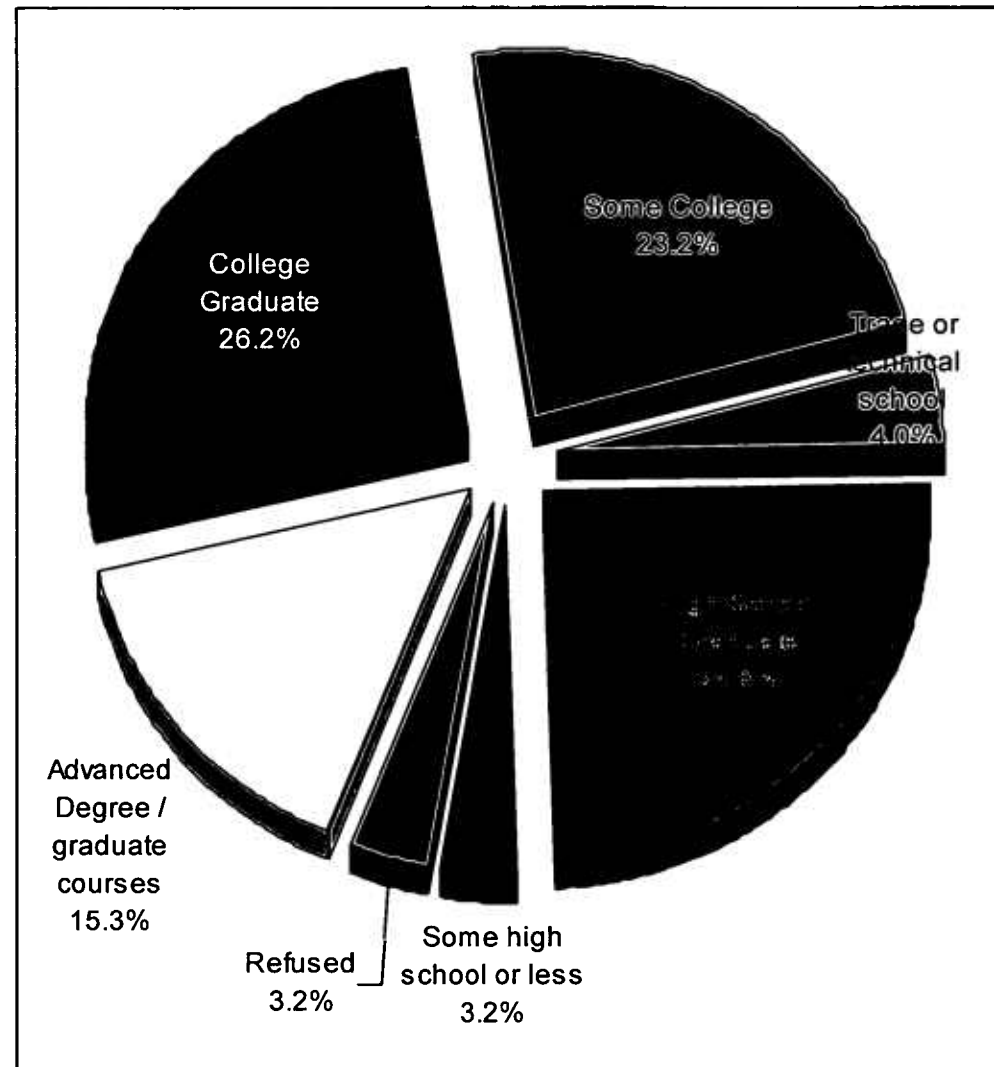
Residence

- The majority of residential customers (80.6%) own their own home.



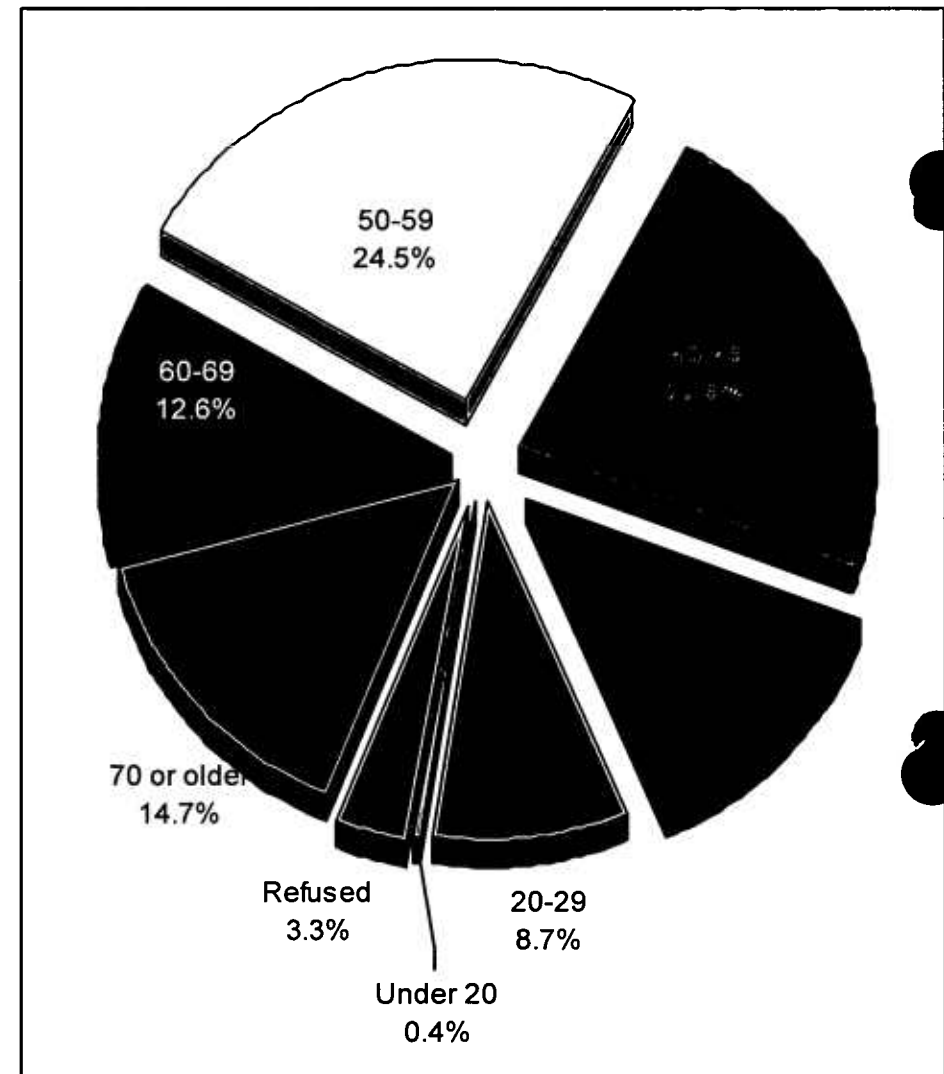
Education

- More than one-third (41.5%) have a college degree or higher education.



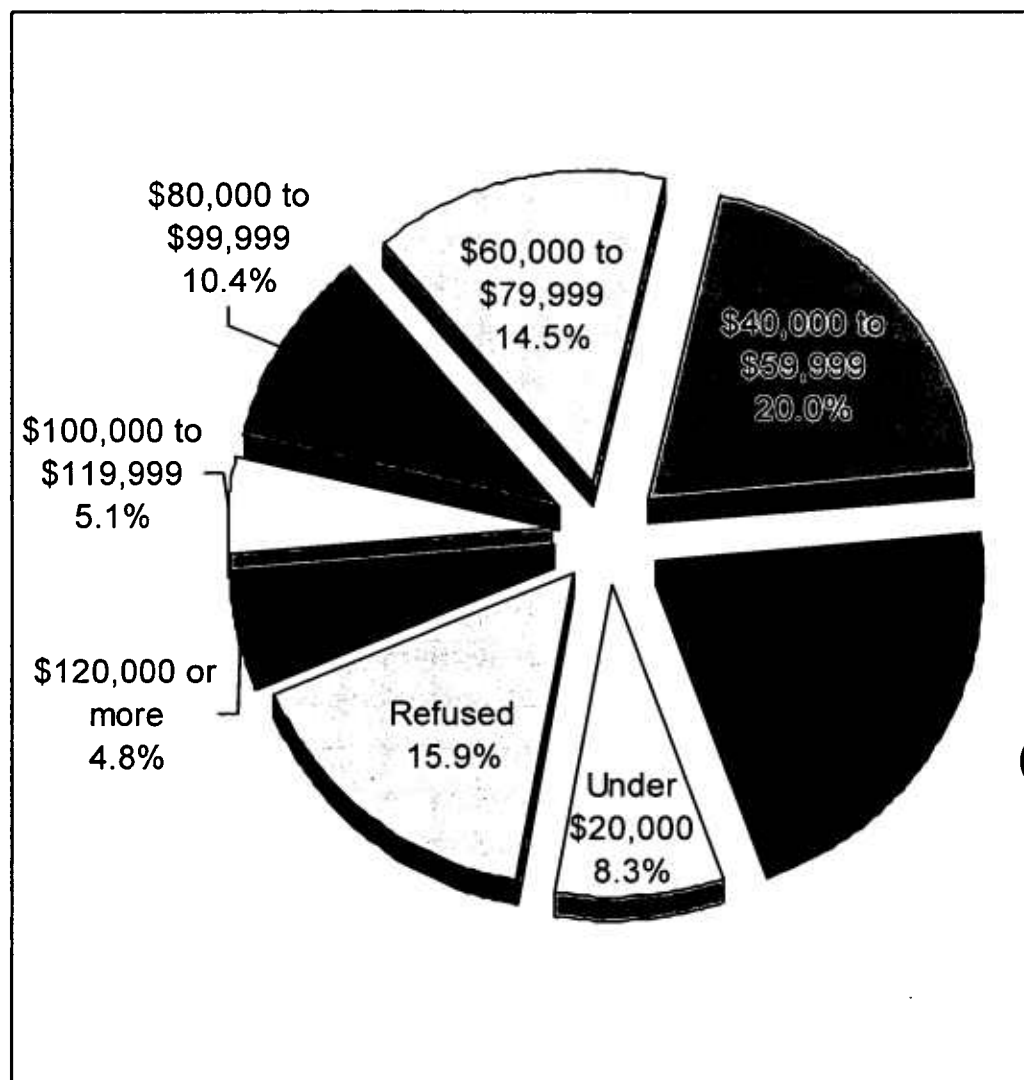
Age

- Many residential respondents are in older age groups. Over half (51.8%) are age 50 or older.



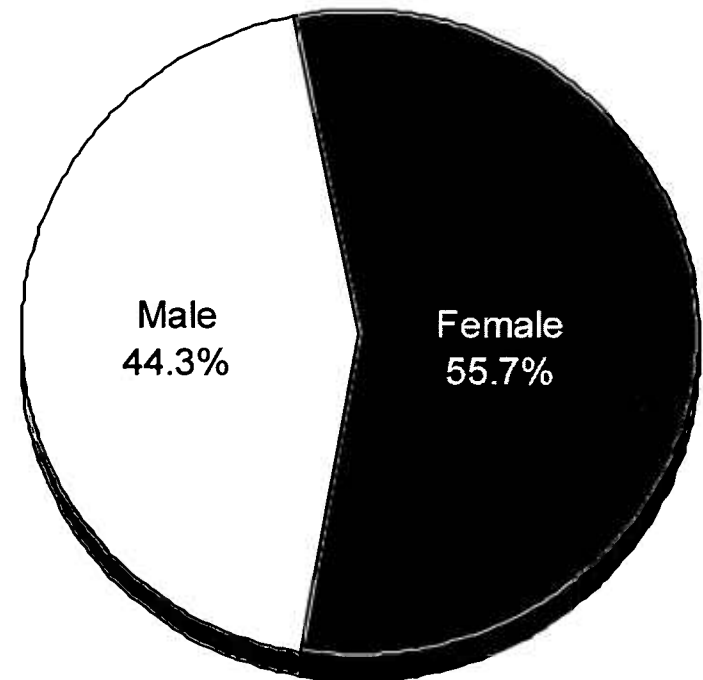
Income

- About half of the residents surveyed (49.3%) have a household income under \$60,000.



Gender

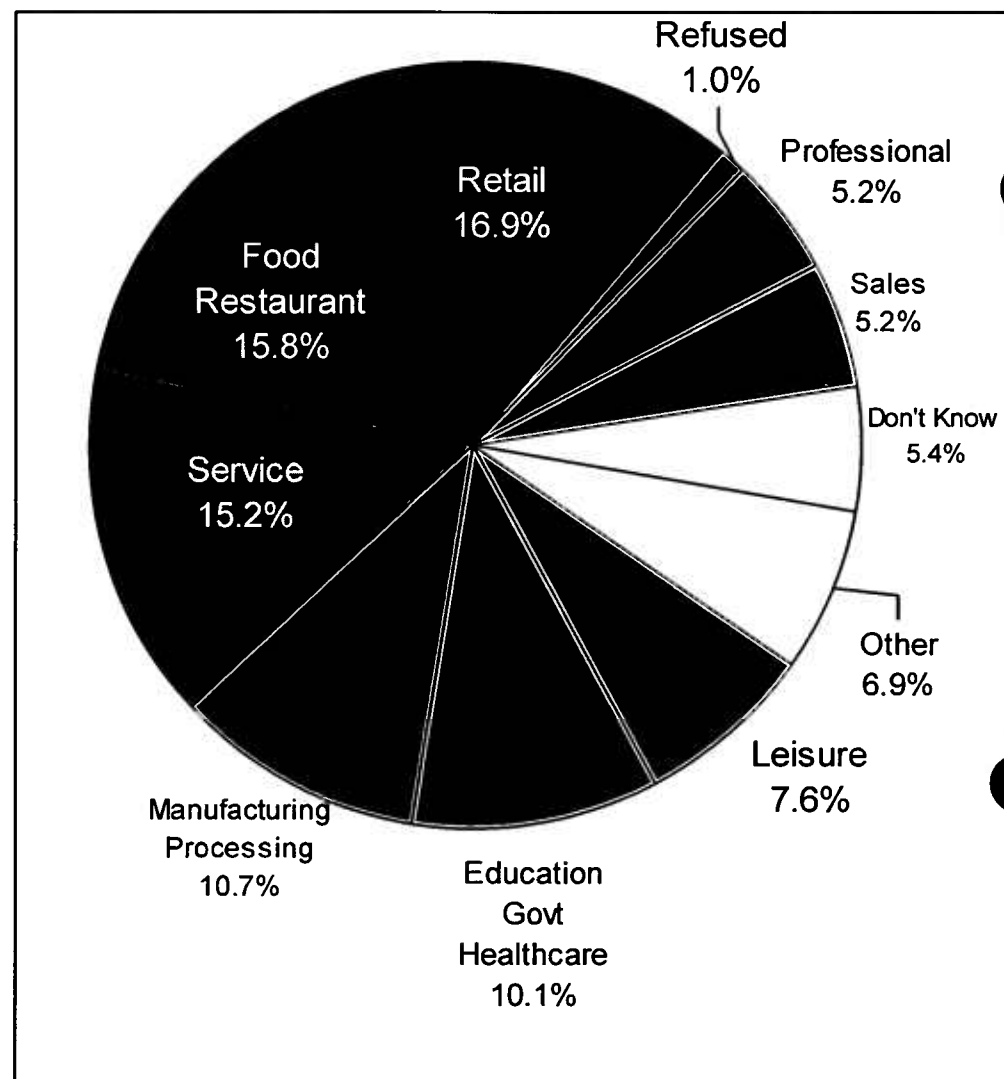
- Most residential respondents (55.7%) are female.



Commercial Respondent Profile

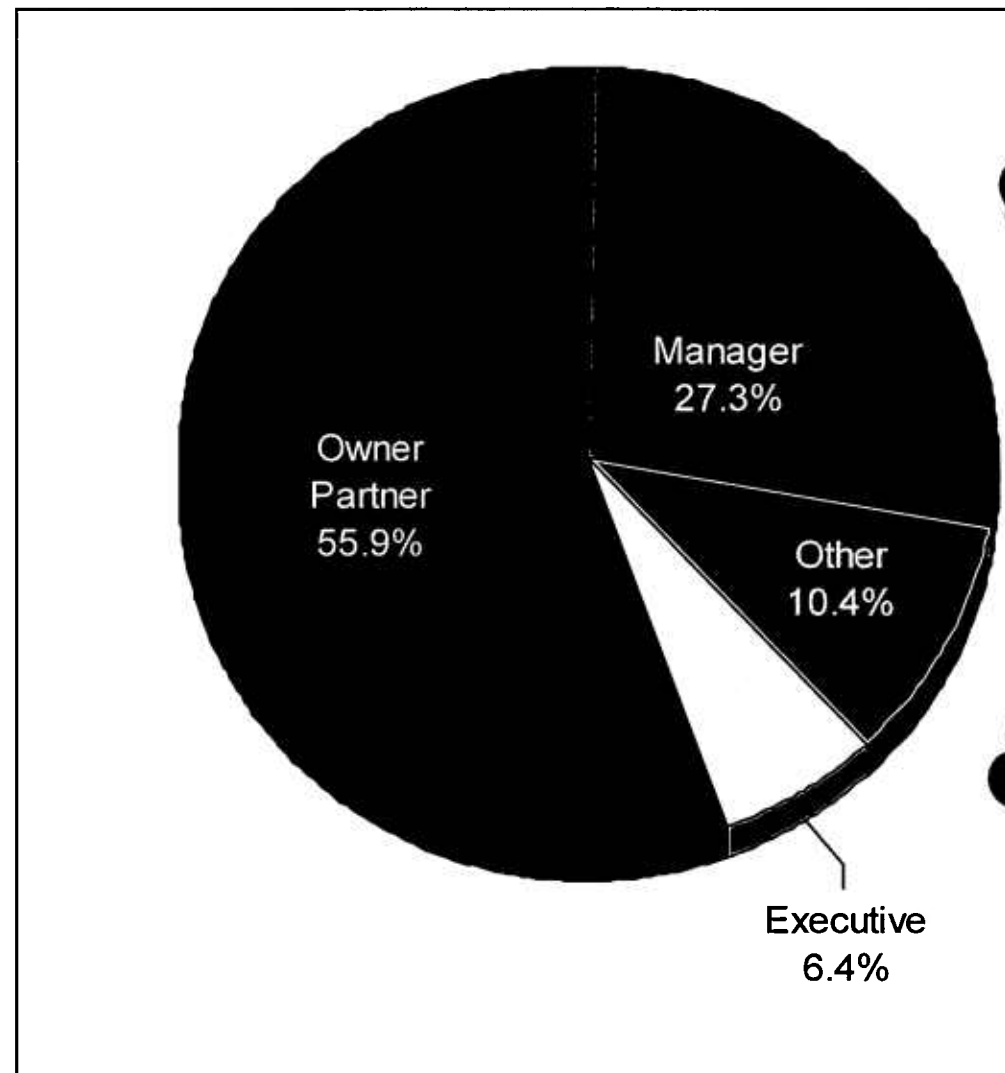
Industry Classification

- The most frequently mentioned industry classifications were retail (16.9%), food related (15.8%) and service (15.2%).



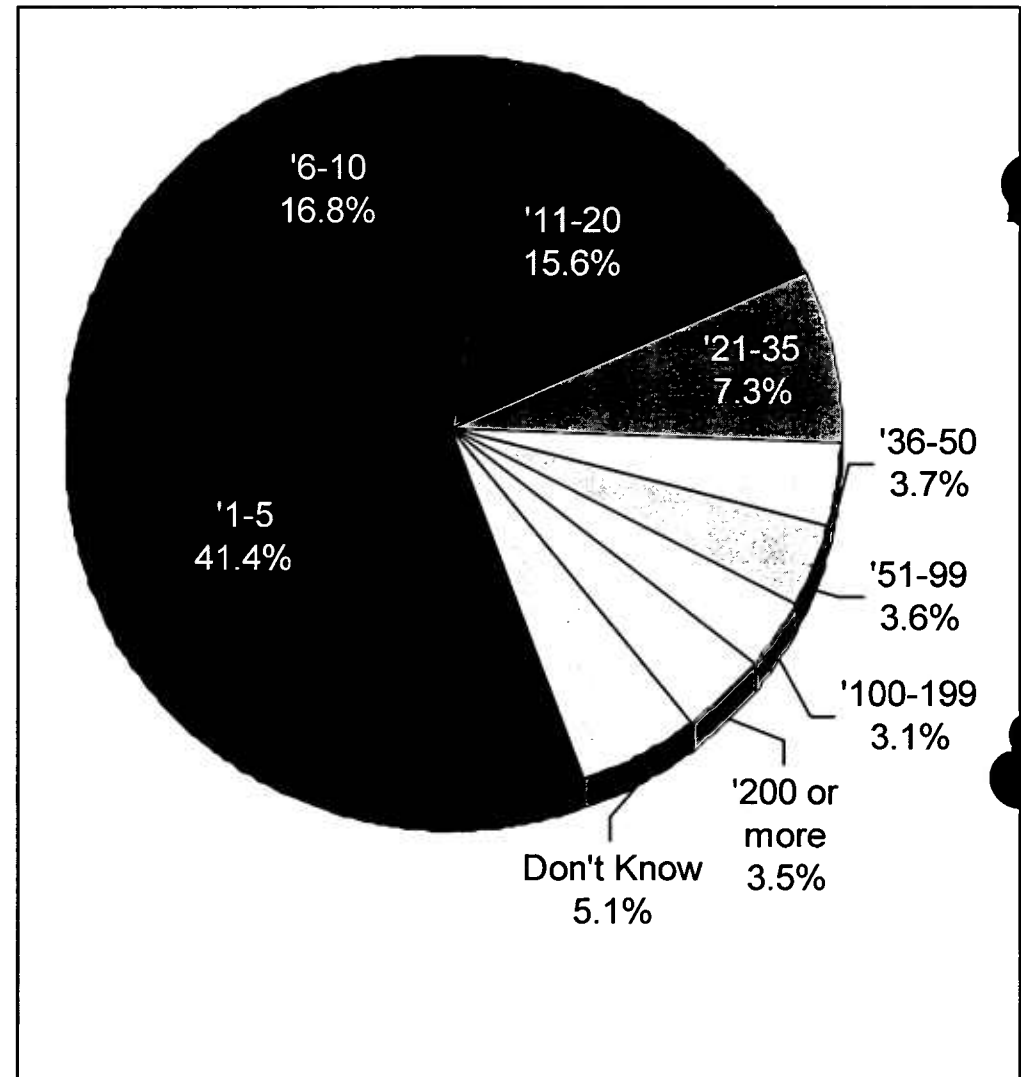
Job Title

- More than half of the respondents are business owners.



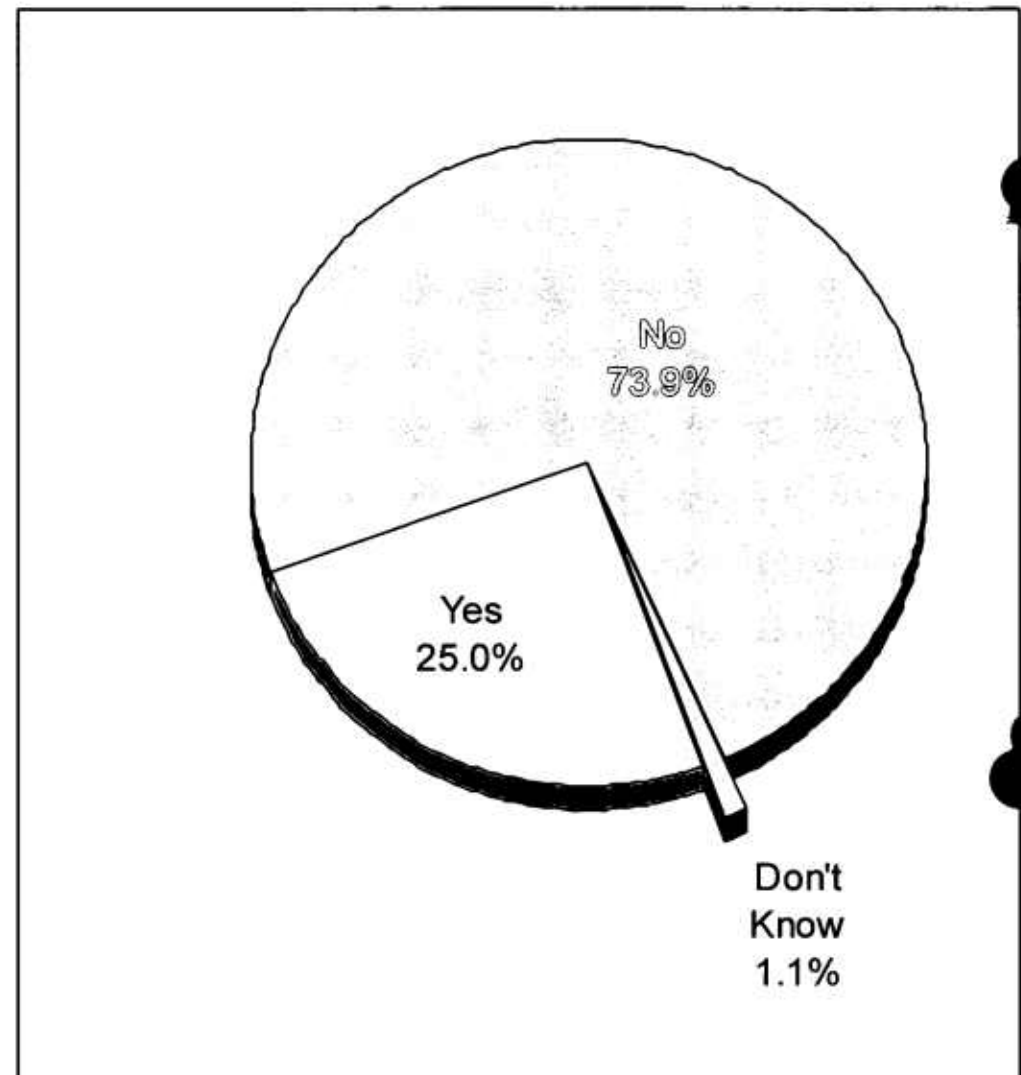
Business Size

- Most respondents reported smaller size business with almost three quarters reporting under 20 employees.



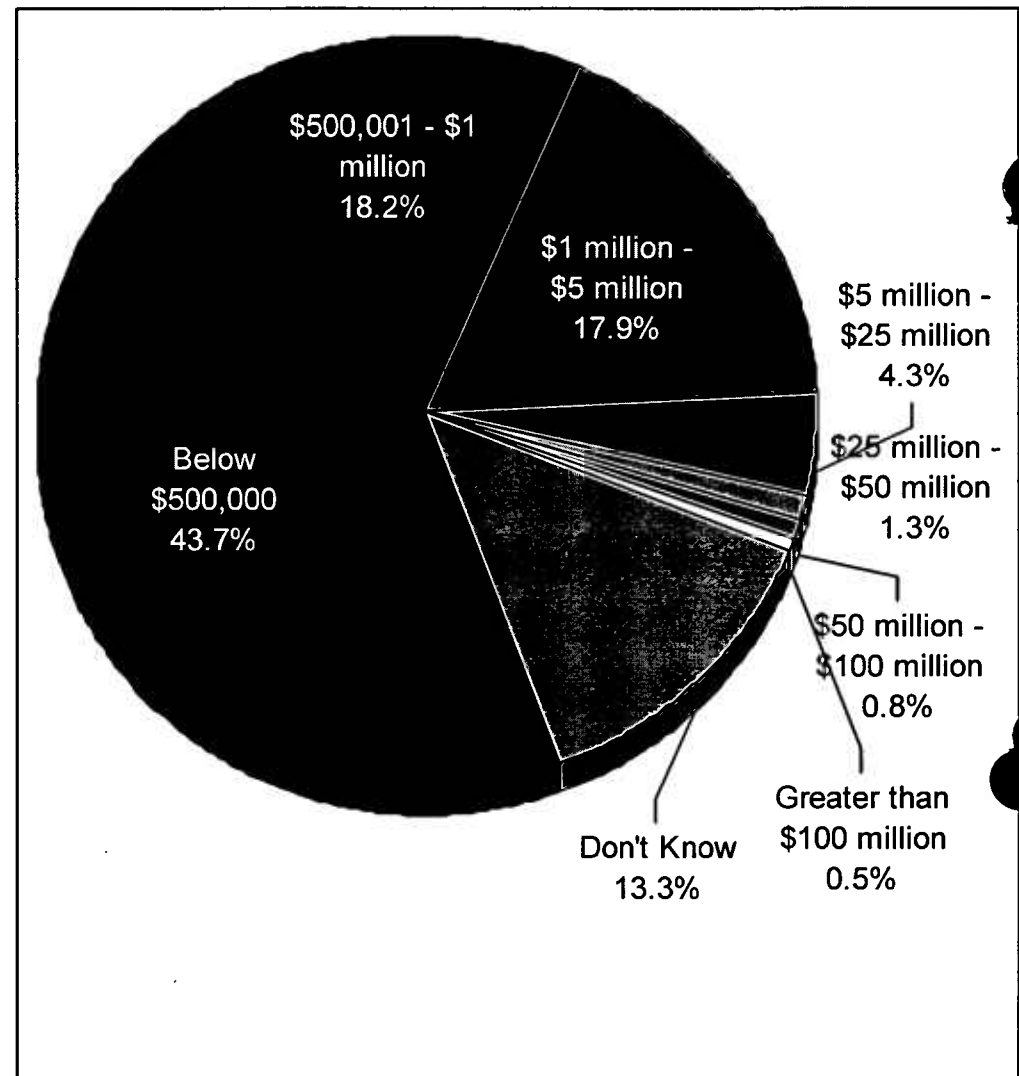
Multiple Locations

- Almost three quarters of respondents reported they do not have multiple locations within New York State.



Business Income

- More than three fifths of the commercial respondents are relatively smaller in size regarding income level, reporting below \$1 million.



Gender

- Most commercial respondents (62.7%) are male.

