Northern Gas Networks Business Plan Acceptability

Final Report

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Summary

- **This report presents findings of research with NGN's customers – current and future – and wider stakeholders to understand acceptability of NGN's draft RIIO2 business plan. 1,353 people took part in total (1,068 domestic customers, 108 non-domestic customers, 133 future customers and 44 other stakeholders)**
- **Informed acceptability of the plan is high and compares well when benchmarked**
  - When informed of the detail of the plan, nine in ten customers find it acceptable (92% of domestic customers, 88% of non-domestic and 96% of future customers). Acceptability is slightly lower, but still high, among stakeholders (80%)
  - This is very high when benchmarked against other utilities – coming in the top quartile in the context of water companies for PR19
  - Only 1% of domestic customers and 2% of non-domestic customers find the plan unacceptable. No future customers find it unacceptable. Fewer than one in ten stakeholders find it unacceptable (9%)
  - Acceptability does not vary significantly across the three bill reduction levels tested, ranging from 90%-93% for domestic customers and 85% to 89% for non-domestic
  - Environment and Reliability elements of the plan are commonly linked to high acceptability, suggesting these help to elevate acceptability to higher levels. Safety, while viewed as very important for NGN to focus on, is more of a hygiene factor – critical to do, but less likely to heighten acceptability - as it has a weaker link to high acceptability of the overall plan.
  - Of the very small number of customers dissatisfied with the plan, the reasons mostly relate to a desire for more ambition regarding the environmental targets, concern that the plan is not going beyond NGN's basic obligations or that the promises lack substance
- **A majority find NGN's proposed bill levels acceptable**
  - 78% of domestic customers find the proposed bill level acceptable when uninformed, while for non-domestic customers, bill acceptability is 82%
  - 83% of future customers find the proposed bill level acceptable, while for stakeholders it is 77%
- **Most customers find the plan affordable**
  - Three-quarters of customers say (when uninformed) they would find the proposed bill impact affordable (74% domestic and 77% non-domestic). Just 6% domestic and 5% non-domestic say it would be unaffordable
  - Future customers are less likely to find the proposed bill affordable; 67% say it is affordable and 10% believe it would be unaffordable
  - Over eight in ten of informed customers find the plan affordable (85% domestic and 83% non-domestic). Just 3% feel it would not be very affordable
  - Uninformed affordability does not differ significantly across the bill reduction range

- **The plan is seen to provide good value for money**
  - 84% domestic and non-domestic customers, and 85% of future customers, feel it provides good value for money
- **NGN's key promises are considered acceptable by a high majority (over 90% for customers and future customers and 80% for stakeholders)**
  - Main reasons for not being acceptable relate to concerns that reductions will not be passed on to the customer and that promises need to be followed through with action
- **Of NGN's 7 promise areas, safety is considered very important, rated in the top two priorities by all groups**
  - Value for money is also rated a high priority among current customers (top for non-domestic and second for domestic)
  - Safety is a strong priority among stakeholders, following by investment in the pipe network
  - Future customers place considerable emphasis on the environment; 42% believe it is the most important priority for NGN to focus on
- **Acceptability of performance commitments is high across all of the five performance areas**
  - For customers/future customers, acceptability is lowest for the Environment and protecting customers most in need (although still at least 80% for both). For stakeholders, safety receives the lowest acceptability score (77%)
  - Where deemed unacceptable, environmental commitments are either seen as not stretching or quick enough, or not NGN's responsibility/a priority for action
  - Similarly, customers finding the commitments for supporting the most in need unacceptable are divided between those wanting more ambition and those questioning if this is NGN's role
- **Trust in NGN to deliver against the proposed plan is high at over 80%. Of the remainder, most provide a neutral response and very few give a low rating on trust**
- **Overall a strong majority of customers support the plan, finding it matches their priorities for action**

Table 1: Summary results for acceptability, affordability and value for money of plan, and acceptability of key promises.

	Acceptability (uninformed)	Acceptability (informed)	Affordability (uninformed)	Affordability (informed)	Value for money	Acceptability of Promises
Domestic customers	78%	92%	74%	85%	84%	91%
Non-domestic customers	82%	88%	77%	83%	84%	92%
Future customers	83%	96%	67%	80%	85%	97%
All customer measure[1]	79%	92%	74%	84%	84%	92%
Stakeholders	77%	80%	N/A	N/A	73%	80%

[1] The 'all customer' measure presents the aggregated result for all 'customers', including domestic customers, non-domestic customers and future customers. It should be noted that this includes future customers for which it is not possible to devise an accurate sampling frame. There is no demographic profile of the population of potential future customers on which to base target quotas.

1 Introduction

1.1 Background

Northern Gas Networks (NGN) operates in a regulated environment and is currently 6 years into its existing 8-year business plan cycle. The next price control period (RIIO-GD2) commences in March 2021, before which NGN needs to formulate, test and submit its preferred plan outlining proposed investments/ improvements as well as the impact on customer bills.

NGN has undertaken a wide-ranging programme of stakeholder engagement to ensure that their RIIO-2 Business Plan (2021 – 2026) has been developed with the voice of the customer and wider stakeholders at its heart. This work has included a series of strategic stakeholder engagement projects such as workshops, surveys, public sessions, research to understand customer willingness to pay, roadshows, panels and other forms of targeted engagement.

This Acceptability research was commissioned with the intention of ensuring that NGN's draft Business Plan is in line with stakeholder priorities and expectations. The work also needed to explore whether customers and NGN's stakeholders found the bill impact(s) of the proposed plan affordable.

1.2 Objectives

Northern Gas Networks' (NGN) main aims from this research were to test the acceptability of their business plan and test affordability of proposed bill levels.

The research needed to test acceptability of an outline business plan among a range and representative spread of NGN's stakeholders (customers, future customers and wider stakeholders that may be affected by NGN's plans), including those who have been involved in the development of the draft plan through participation in NGN's 12-month stakeholder engagement process.

Furthermore, it aimed to ensure NGN's proposals, including proposed RIIO-GD2 outputs and outcomes, are supported by, and meet the requirements of, key stakeholders.

Detailed objectives were to:

- Test the level of overall acceptability of NGN's business plan
  - Where not acceptable, explore why
- Test acceptability of specific key elements of the plan:
  - acceptability of NGN's proposed 5 performance areas and the performance commitments within these

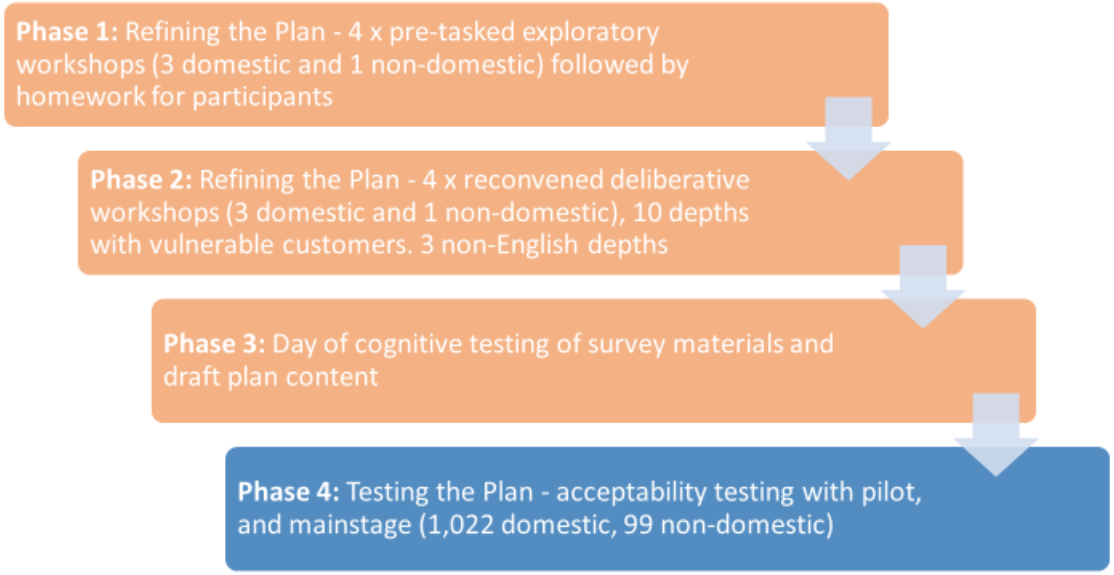
- Understand how customers perceived NGN in terms of trust and value for money having seen the plan and the bill impact
- Test the level of affordability of the bill impact to deliver the preferred business plan
  - if not considered affordable, explore why

2 METHODOLOGY

The research covered three types of participant; current customers (domestic and non-domestic), future customers aged 18-25 and wider stakeholders. To ensure the most appropriate methodology was used, a different approach was taken for each group. The remainder of this section provides details of the methodology used for each group.

2.1 Customers

To fulfil the study objectives, Accent devised a phased approach consisting of four key phases of work. This programme was designed to ensure a research process that was engaging and enjoyable for customers whilst providing the richness of insight and robustness of data required to show customer response to the proposed Business Plan. The phases of work are summarised below and outlined in greater detail throughout the remainder of this section:



Qualitative phase

The research began with a qualitative stage, involving a total of 55 customers, to help refine the plan and presentation of survey materials:

1. 4 reconvened workshops held in Hull (10 domestic customers and 9 non-domestic) and Carlisle (16 domestic customers)
   - All participants were set a pre-task prior to the first session to review information about NGN and brief introduction to the concept of the business plan
   - Session 1 (60 minutes): introduce NGN, an initial introduction to the plan and Q&A
   - Homework task to review business plan content and complete workbook

   - Session 2 (120 minutes): Customer exploration of the business plan to refine plan presentation and understand drivers of acceptability
2. 10 depth interviews (60 minutes) with customers experiencing a vulnerability; 5 in Stockton and 5 in Bradford
   - All participants pre-tasked to review information about NGN and introduction to the concept of the business plan
3. 3 in-home depth interviews (60 minutes) with non-English speakers (Urdu and Hindi) in Bradford
4. 1 day of cognitive testing (7 interviews) in Leeds to test comprehension of resulting questionnaire and supporting business plan materials

Quantitative phase

The quantitative approach taken was as follows.

Domestic customers
The survey targeted people responsible (either jointly or solely) for paying the household energy bill, living in a property in the NGN area with a mains gas supply, or who anticipate living in a property with a mains gas supply during the business plan period.

The sample was provided by a mixed-method approach; online panel sample supplemented by an in-home survey conducted by Computer Assisted Personal Interview (CAPI). The CAPI survey was included to ensure sufficient coverage of offline customers or those who would be less likely to be on a panel - notably customers more likely to be in a vulnerable position, such as those on low incomes, with a disability etc.

A pilot was completed between 16th – 17th July for the domestic customer sample. Following completion of the domestic customer pilot, and review of the data, the full fieldwork for customers was launched. As there were no substantial changes to the survey wording or information presented on the business plan, the pilot sample was combined with the main fieldwork sample and is included in the results presented in this report. Fieldwork dates and the number of domestic customers participating in the survey are set out in Table 2.

Table 2: Domestic customer survey fieldwork dates

	Online	CAPI	Total
Fieldwork dates	25 July - 07 August	24 July - 05 August	N/A
Sample size	910	112	**1,022**

To provide a representative sample of customers, quotas were applied. For the online survey, quotas were set on age, gender, social grade and urban/rural status. Sampling ensured that customers were drawn from across the NGN area.

For the CAPI survey, quotas were set on age, gender and social grade. The targets were set on the population of people aged over 16 who have never used the internet or have not done so within the last three months[2] (i.e. the 'offline' population). Screening

[22] https://www.ons.gov.uk/businessindustryandtrade/itandinternetindustry/datasets/internetusers

questions ensured that all CAPI participants had not used the internet (other than for sending emails) in the previous six-month period.

CAPI sample points were selected to include a range of urban, suburban and rural locations in geographical areas more likely to have higher proportions of vulnerable customers. The fieldwork period included a mix of weekday afternoons and evenings and weekends to maximise the number of householders being at home.

Table 3: Quota targets for domestic customer survey

Quota group (Online)		NE/Y&H Profile (%)	Achieved
Age	16-34	18	15
	35-64	55	53
	65+	27	32
SEG	ABC1	47	57
	C2DE	53	43
Gender	Male	49	47
	Female	51	53
Urban / Rural	Urban	82	83
	Rural	18	17

Quota group (CAPI)		Profile (%)	Achieved
Age	16-34	2	6
	35-64	19	30
	65+	79	64
CEG	A/B	7	7
	C1/C2	44	35
	D/E	49	57
Gender	Male	42	42
	Female	58	58

To account for any shortfalls in quotas, domestic customer data was weighted by age and social grade to the profile of the population in the Yorkshire and Humber and North Eastern regions, based on 2011 census data (as the closest approximate match for the NGN area). A full breakdown of the weighted and unweighted domestic customer sample is provided in Table 4.

Table 4: Domestic customer survey sample profile

Demographic characteristic		Unweighted (%)	Weighted (%)
Age	16-34	15	17
	35-64	53	56
	65+	33	26
SEG	ABC1	57	47
	C2DE	42	53
Gender	Male	47	45
	Female	53	55
Urban / Rural	Urban	83	83
	Rural	17	17

The acceptability testing research included a range of customers, including those experiencing a vulnerability. Provision was made for inclusion of harder to reach customers and those experiencing a vulnerability in the following ways:

- Qualitative stage:
  - 10 depth interviews with customers experiencing a range of vulnerabilities (including a mix of physical, illness/chronic condition, pregnancy or child under 12 months of age and temporary vulnerability)
  - 3 in-home depth interviews with non-English speakers (Urdu and Hindi)
- Domestic customer survey:
  - 11% of the survey sample was provided through an interviewer-administered face to face survey. This targeted offline customers (those without internet access or who had not accessed the internet in the previous six months), based on census data on internet usage.[3] This sample therefore included a higher proportion of customers those experiencing some form of vulnerability (48% compared to 43% of the online sample).
  - For customers who did not speak English well enough to do the interview, interviewers used translated postcards to provide more information about the survey and giving contact details for them to arrange an interview time when a family member could help translate. The postcards were translated into the most common non-English languages spoken in the region.[4]

Non-Domestic customers

The survey targeted individuals representing an organisation in the NGN area with a mains gas supply. The individual needed to be responsible (either jointly or solely) for decisions regarding the organisation's energy bill or for liaising with their energy provider(s). Only organisations with a separate business premises were in scope. Organisations operating from domestic premises were excluded as they would be considered a domestic customer.

A mixed method approach was taken comprising a telephone survey – via Computer Assisted Telephone Interview (CATI) - alongside an online survey. The telephone survey used purchased business sample of telephone contact details (from *Sample Answers*), while the online survey was conducted using a specialist business panel (*Dynata*).

As the non-Domestic questionnaire was very similar to the domestic version, the survey was soft launched before minor amendments were made to the interviewing process and logistics. Survey stimulus was sent to non-domestic participants via email.

Fieldwork dates and sample sizes are shown in

[3] https://www.ons.gov.uk/businessindustryandtrade/itandinternetindustry/datasets/internetusers

[4] Based on 2011 census data for the North East and Yorkshire and Humberside on main non-English language spoken among people who cannot speak English well or at all (Polish, Urdu, Bengali, Punjabi). https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/language/articles/detailedanalysisenglishlanguageproficiencyinenglandandwales/2013-08-30

Table 5: Non-domestic customer survey fieldwork dates

	CATI	Online	Total
Fieldwork dates	30 July to 15 August	26 July to 17 August	N/A
Sample size	50	49	**99**

To provide a representative sample of non-domestic customers, quota targets were set on industry sector and size of organisation. Quotas were set on the profile of organisations by postcode, based on the postcode areas covered by the NGN area (set out in Table 6).

Table 6: Quota targets for non-domestic customer survey

Sector	CATI Target (%)	CATI Achieved (%)	Total Achieved: CATI + Online (%)
Agriculture, Forestry and Fishing (code A)	2%	0%	0%
Mining and Quarrying (code B)	<1%	0%	0%
Manufacturing (code C)	10%	14%	15%
Energy of water service + supply	<1%	%	0%
Construction (code F)	13%	10%	13%
Wholesale and retail trade (code G)	20%	16%	12%
Transport and storage (code H)	3%	0%	0%
Hotels & catering, accommodation and food service activities (Code I)	5%	6%	7%
IT and Communication (code J)	5%	4%	10%
Finance and insurance activities (code K) (banking, insurance) and real estate activities (code L)	6%	6%	5%
Business services: Professional, scientific and technical activities (code M) and Admin and support services (code N)	19%	12%	12%
Government (code O), education (code P) (schools, universities) and health (hospitals, doctors, dentists) and social work (charities, nursing care, social work) (code Q)	7%	18%	12%
Arts, entertainment and recreation (code R)	3%	6%	4%
Other service activities (code S)	6%	8%	4%
Other (specify)	N/A	N/A	5%

The non-domestic sample aimed for a range of organisation sizes, with the achieved breakdown as set out in Table 7.

Table 7: Non-domestic customer survey sample structure (size)

Organisation size (number of employees)	CATI	Online	Total (%)
1-3	9	4	13 (13%)
4-49	25	16	41 (41%)
50-249	10	9	19 (19%)
250+	6	20	26 (26%)
Total	**50**	**49**	**99**

2.2 Future Customers

Qualitative phase

Future customers were first engaged using an online discussion board. This platform provided future customers with the opportunity to respond on material relating to NGN's business plan and specific actions contained within its Environmental Action Plan. It also allowed participants to see the responses of other future customers on these issues.

18 participants aged 18-25 undertook a series of tasks across a one-week period allowing them to indicate preferences for NGN's future activity and responses to planned activities set out in the business plan. The aim of the online discussion board was to understand future customers' priorities and test materials for the development of a quantitative survey stage. All participants lived in the NGN area but did not currently have responsibility for paying the gas bill but expected to do so in the RIIO-2 period.

Quantitative phase

The survey targeted people living in the region who are not current customers of NGN but are likely to be during the RIIO-2 period. All participants were aged 18+ and fell into one of the following categories:

- Has a gas supply and is not the energy bill-payer, but expects to be paying the gas bill in the next 5-year period
- Is the energy bill payer and does not have a gas supply but expects to live in a property with a gas supply in the next five years

Future customers were sampled using a specialist youth online panel (*Youthsight*).

The survey of future customers took place between 4th - 9th September.

Future customer sample profile

In total, 115 future customers aged 18-25 completed the acceptability testing survey. The profile of the future customer sample is set out in Table 8 and Table 9.

Table 8: Future customer types

Type of future customer	%
Live in student accommodation and energy bills are included within rent	26
Student and a parent/guardian pays the energy bill	20
Live with parent(s)/guardian(s) and they are responsible for paying the energy bill	50
Live in shared accommodation and someone else is responsible for paying the energy bill	2
Live in rented accommodation and energy bills are included within rent	2

Table 9: Demographic profile of future customers

Demographic group		%
SEG	ABC1	58
	C2DE	42
Gender	Male	41
	Female	57
	Other	2
Age	18-19	43
	20-21	26
	22-23	15
	24-25	16
Household in receipt of benefits	Yes	27
	No	62
	Prefer not to say	11
Someone in household has a disability	Yes	32
	No	61
	Prefer not to say	7
Rural / Urban	Rural	14
	Suburban / semi-rural	41
	Urban	43
	Don't know	3

2.3 Stakeholders

Quantitative phase

A survey was undertaken of NGN's stakeholders ('policy shapers' and 'placemakers') that have previously engaged with NGN, shown interest in engaging on the business plan, or that are likely to be impacted by delivery of the business plan.

Two online surveys were developed; a full version issued via NGN's stakeholder bulletin, and a shorter version developed for social media and promoted by social media channels such as LinkedIn.

The survey of stakeholders took place between 29th July - 6th September.

Stakeholder sample profile

No quotas were set as it was not possible to control completion rates by different stakeholder types. The profile of the stakeholder sample is set out in

Table 10: Stakeholder sample profile

Organisation Type	Number	%
Wider NGN workforce and supply chain	7	16
Business, Trade and Manufacturing Groups	6	14
Local Authority / LEP / Parish Council / Councillors	5	11
Charity / Third sector	4	9
Utility Infrastructure Provider	4	9
Education / Skills	3	7
Highway Authorities	2	5
Developers / Housing / Landlords	2	5
Other utilities / infrastructure	2	5
Health & Emergency Services Providers	1	2
Prefer not to say	4	9
Other (please write in)	4	9

2.4 Questionnaire

A separate questionnaire was developed for each audience – domestic customers, non-domestic customers, future customers and stakeholders (2 versions – full length and social media). Each of these questionnaires followed the same structure but used language and questions appropriate to the audience.

The questionnaire design followed guidance learnt from experience in the water sector, most recently during PR19:

1. 'Uninformed' as well as 'informed' questions were asked.
2. Respondents were asked to indicate how acceptable they found the business plan/bill impact put to them on a scale from 'very unacceptable' to 'very acceptable', plus a 'don't know' option, with the middle of the five-point scale being 'Neither acceptable nor unacceptable'. The middle option was considered important to allow people to express a neutral viewpoint.
   - A '*don't mind*' option was also included as previous research has shown that some customers take this more indifferent view, in distinction from a mid-point response. For clarity it was made clear to the participant that the response would be deemed to indicate acceptance of the plan. <u>However, all analysis in this report on acceptability excludes the '*don't mind*' response from figures referring to the proportion finding something acceptable – this only includes participants selecting 'very acceptable' or 'acceptable'.</u>
3. Bill impacts were shown in real terms, i.e. in current prices, making clear inflation was not included.

Measuring both 'uninformed' and 'informed' acceptability

The research also took in the views of uninformed and informed customers. It should be noted that the use of uninformed / informed refers to the same survey participants, but

at different points of the survey experience. Given the low levels of engagement with energy (particularly gas and electricity distribution) that has been observed across a number of years, the approach was based on the working hypothesis that the majority of randomly selected customers would be uninformed at the outset of the interview.

- **Uninformed acceptability:** A small number of questions were asked at the start of the main survey to access the uniformed response to the Business Plan (acceptability and affordability of the bill levels and acceptability of headline promises). Little information was provided to participants at this stage, but they were given some detail on which to base their initial response.
- **Informed acceptability:** For the remainder of the interview views around acceptability of the different elements of the plan were sought and then finally of the plan as a whole. This provided the informed level of acceptability. Participants were also asked about the affordability of the plan again to provide a more informed view of this in comparison to uninformed views.

The questionnaire comprised a 20-25 minute survey (full length; a shorter stakeholder version was used for social media), structured as follows:

- Screening
- Participants were then shown information about NGN's remit, current average bill level/breakdown and challenges faced by NGN.
- Immediately after this, participants were asked to comment on the following to provide a more uninformed response on acceptability and affordability:
  - the acceptability of the plan and planned bill impact
  - the affordability of the planned bill impact (not asked for stakeholders)
- After which they were shown NGN's current performance, and highlights of the Business Plan and key improvements under five headings: Safety, Reliability, Environment, Customer service and Supporting customers most in need. After each section participants were asked about the acceptability of each set of promises
- This was followed by a section on Performance Commitments to explore customers' and stakeholders' understanding of these and whether they support NGN's suggested targets. Six Performance Commitments (across the 5 outcome areas of the plan; reliability included planned and unplanned interruptions, with each customer seeing one of each) were shown – these were selected at random to ensure the full range of performance commitments were tested
- Once participants had been through these questions, they were again asked the acceptability and affordability questions to assess their informed response:
  - the acceptability of the plan and planned bill impact
  - the affordability of the planned bill impact

The full questionnaires are included in the appendices.

Three different levels of proposed bill levels were tested across the sample; 5% reduction, 7% reduction and 9% reduction. The bill level shown was randomised across each strand of the survey, ensuring that a broadly equal number of participants saw each bill level.

2.5 Use of quotes

Throughout the report, verbatim quotes are used to illustrate participants' views. It should be noted that these often focus on what further information customers and stakeholders need or they feel proposed initiatives could be improved. This is so that NGN is able to understand how the proposed plan can be improved for customers and stakeholders. The emphasis on potential improvements should not detract from the positive results and should be taken in the context of high levels of acceptability overall.

3 FINDINGS

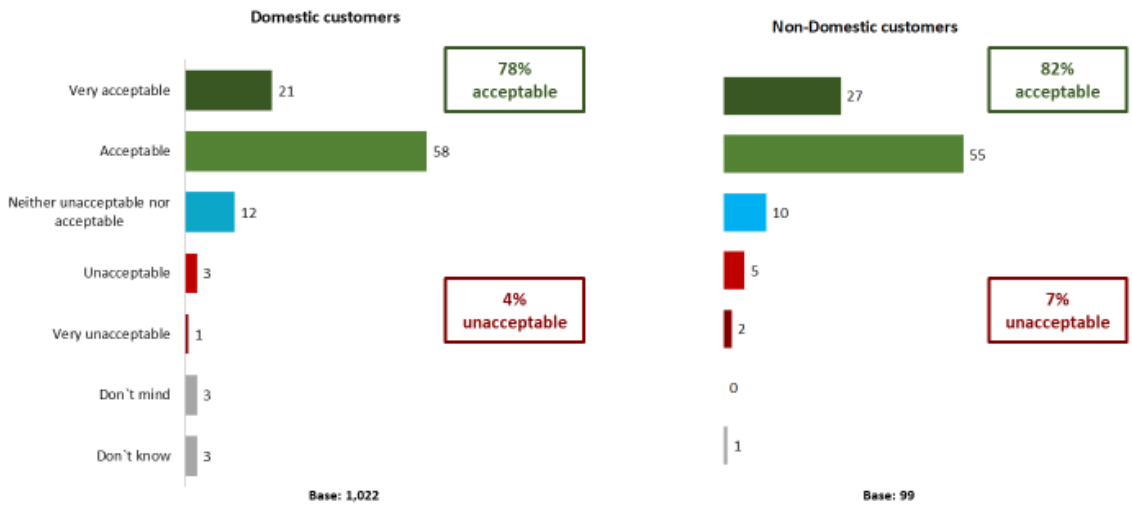
3.1 Introduction

This section of the report sets out the findings of the acceptability testing research. It begins with customers' and stakeholders' uninformed (spontaneous) views of how acceptable the business plan is, in terms of the proposed bill level, and how affordable proposed bill levels are. This is followed by informed views on acceptability and affordability, value for money offered by the plan, acceptability of current and future performance levels, and acceptability of the detailed performance commitments contained within the plan. Finally, it concludes with trust in NGN to deliver the plan.

3.2 Uninformed acceptability / affordability

A strong majority of customers find the proposed bill level acceptable (78% domestic and 82% non-domestic). Just 4% of domestic customers and 7% non-domestic customers say the proposed RIIO2 bill level is unacceptable.

Figure 1: Uninformed acceptability of bill level (*How acceptable do you find this level of bill for 2021 to 2026?)*



For future customers, acceptability is also high, at 83%, although fewer feel the bill level is very acceptable (8%). Just 2% find it unacceptable. Overall, this means the aggregated 'all customer' level of acceptability is 79% (4% unacceptable).

A strong majority of NGN's stakeholders also find the bill level acceptable (77%), with 5% saying it is unacceptable.

Acceptability is high across the range of bill reductions tested, ranging from 77% to 80% for domestic and 72% to 89% for non-domestic customers. For future customers, it ranges from 59% to 73%.[5]

Table 11: Uninformed acceptability of proposed bill level(s)

	Domestic customers		Non-domestic customers		Future customers	
Bill reduction	%	Base[6]	%	Base	%	Base
5%	77%	346	89%	36	68%	37
7%	78%	334	85%	27	73%	41
9%	80%	342	72%	36	59%	37

Acceptability is high across different kinds of domestic customers; there are no differences by age, income or social grade. Non-domestic customers in rural or suburban areas (73%) find it less acceptable than those in urban areas (88%), although this difference is not seen for domestic customers.

Lower social grade future customers are less likely to find the proposed bill acceptable than higher social grades (69% C2DE vs 93% ABC1). However, those in lower social grades are more likely to give a neutral opinion rather than feel the bill is unacceptable (only 2% do).

The main reasons behind domestic customers finding the bill level unacceptable relate to the bill being too expensive, regularly increasing prices and a desire for a greater reduction (answers below are responses given by at least 10% of participants, sample size = 40):

- Too expensive / more than I pay (26%)
- Prices keep rising / not value for money (21%)
- Want lower bills / a bigger reduction (18%)
- Bills high enough already (14%)
- Costs are profit driven / profit margins too high (13%)

Similarly, non-domestic customers find it unacceptable for cost reasons.

"A lot of money has been forked out for previous investments which is too high."

"Not much of a saving is it."

[5] It should be noted that there is no statistically significant difference between the levels of acceptability found for the three bill levels (5%, 7%, 9%) – sample sizes of the non-domestic subgroups shown each bill level ranged from 27 to 36 and for future customers from 37 to 41.

[6] Base size refers to the number of participants answering the question.

"It's time for energy companies to absorb some of the costs themselves rather than simply passing them on to their customers."

"Costs too much."

"Gas bills are too expensive."

"Because it's not enough."

"It's more for my organization."

(Non-domestic customers)

Non-domestic customers' reasons for finding the proposed bill amount neither acceptable nor unacceptable:

"Things change and no one has a crystal ball and I feel I'm being a bit on the fence. If they can keep it static, then that is good."

"It's too low a reduction over too long a period of time; doesn't affect the business' bottom line."

"It is a good concept I suppose."

"It's an average bill so I would like a personal bill to be able to judge further."

"Just the same as usual, energy companies charge whatever they want, and they all stick to around the same price."

"Firstly, I'd be worried that streamlining effectively meant laying people off and, frankly, we should be looking at renewables rather than gas."

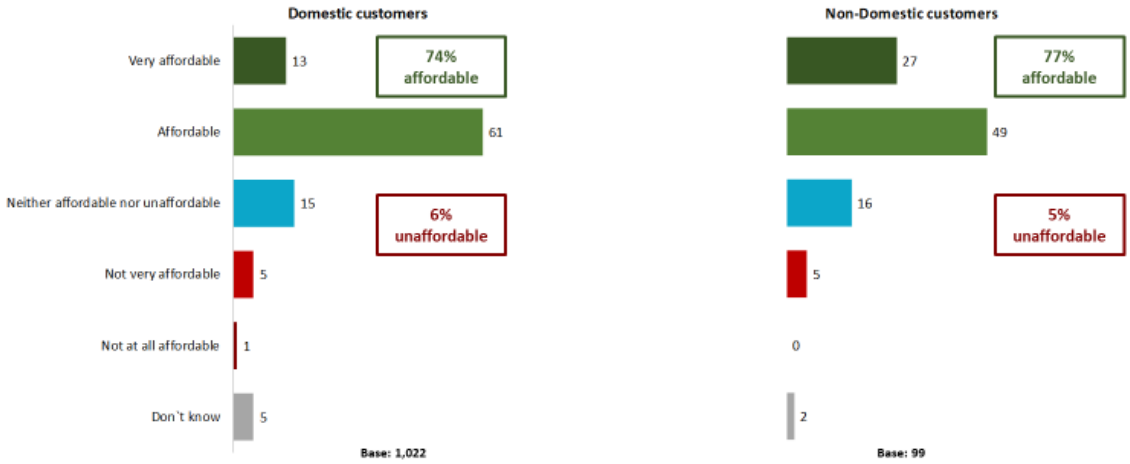
"The new pipelines will be new so therefore will not need renewing for years so maintenance costs will be down."

"The vast majority of money increases goes to the Government and wholesaler leaving network operator 17%."

(Non-domestic customers)

Three-quarters of customers say they would find the proposed bill impact affordable (74% domestic and 77% non-domestic). 6% of domestic customers and 5% of non-domestic customers say the bill would be not very or not at all affordable. Only 1% of domestic customers and no non-domestic customers say the bill level would be completely unaffordable.

Figure 2: Uninformed affordability (*And how affordable would this bill level be for you / your organisation?*)



Affordability declines with income, falling from 85% among households earning in excess of £52,000 a year to 58% earning £10,400 or less per annum. The proportion of this latter group saying the bill level would be unaffordable is 14%.

For domestic customers, the three different bill levels tested are all seen as equally affordable; 73% find the 5% reduction affordable and 75% find both the 7% and 9% reductions affordable. For non-domestic customers at least 70% of customers find each proposed bill level affordable (86% affordable for 5% reduction, 70% for the 7% reduction and 72% for the 9% reduction). Given sample sizes, the level of acceptability is not statistically significantly different between these three levels.

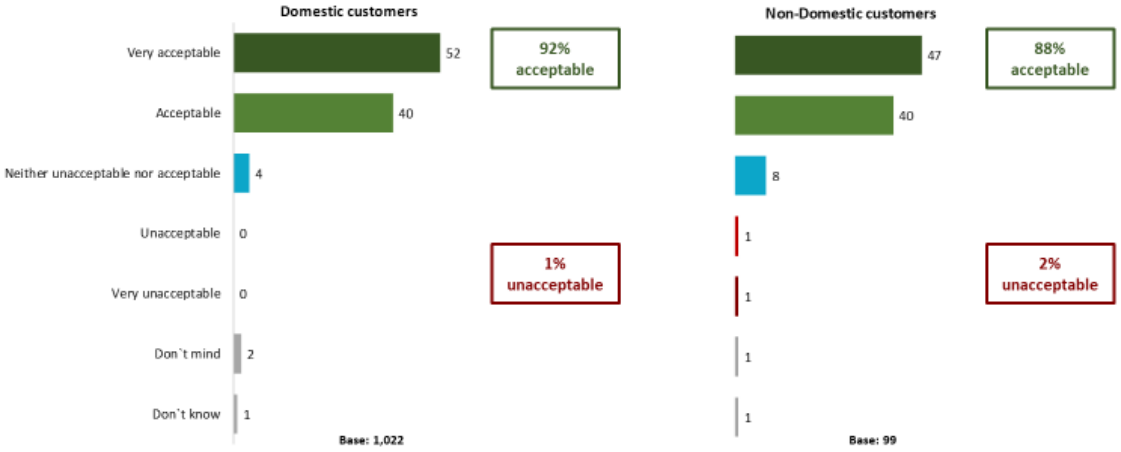
Affordability is lower among future customers, with 67% saying it would be affordable, and 10% not very affordable. 15% say it would be neither affordable nor unaffordable and 9% do not know whether it would be affordable. Affordability does not vary by income levels.

When all customer groups are combined, uninformed affordability is 74% (6% unaffordable).

3.3 Informed acceptability

Once customers are presented with greater detail on the plan, including the detailed performance commitments along with current NGN performance, acceptability increases further to nine in ten (92% of domestic and 88% of non-domestic customers). A very small proportion of customers find the plan unacceptable (1% of domestic customers and 2% of non-domestic).

Figure 3: Informed acceptability (*Now that you've learnt more about Northern Gas Networks` Business Plan for 2021- 2026 how acceptable do you think it is overall?)*



As with uninformed acceptability, levels of acceptability are consistent across the three bill reduction levels shown (90% - 93% for domestic and 85% to 89% for non-domestic).

Acceptability is also very high among future customers at 96%. No future customers say it is unacceptable.

When all customer groups are combined, informed acceptability is 92%.

Wider stakeholders are least likely to find the plan acceptable, but acceptability is still high (80%). 9% say the plan is unacceptable.

Benchmarking NGN's acceptability results

As indicated by Table 12, NGN's acceptability scores compare very favourably to other utility companies. As the sector where acceptability testing research is best developed, the water sector provides the most useful comparison. Across the 17 water companies in England and Wales submitting business plans for PR19, the average acceptability measured was 83% for real-term bill impacts and 77% for nominal bill impacts. NGN's acceptability score of 92% (bill impact presented in 'real terms') for domestic customers would place it around 4th (top quartile) in this list.

Table 12: PR19 Water company Business Plan acceptability scores[7]

	Acceptability of Plan, including proposed bill impact	
Company	**Real-terms**	**Nominal**
Affinity	79% (water only) / 75% (dual)	
Anglian	71%	
Bristol	93% (water only)	83% (water only)
Hafren Dyfrdwy	73%	56%
Northumbrian	91%	
Portsmouth	84% (water only) 86% (dual)	80% (water only)
SES	76%	
Severn Trent	85%	
SEW	82% (water only)	50% (water only)
South Staffs		74% (water only)
South West	88% (SW area) 92% Bournemouth	
Southern		79%
Thames	87%	82%
UU		76%
Welsh	93%	93%
Wessex		96% (water only)
Yorkshire	67%	
Average	**82.9%**	**76.9%**

3.3.1. Drivers of acceptability and unacceptability

To understand what drives acceptability of the plan, it is worth exploring the relationship between acceptability of the plan overall, and acceptability of the thematic promises contained within the plan as well as the detailed outputs it proposes. Given the high proportion of customers finding the plan acceptable, it is necessary to focus on customers who find the plan very acceptable. Differentiating between support for the plan and stronger support helps to identify whether there are particular aspects of the plan which elevate support to a higher level.

This analysis focuses on domestic customers, given the larger sample size for this group and therefore the greater ability to disaggregate between stronger and weaker support for the plan.

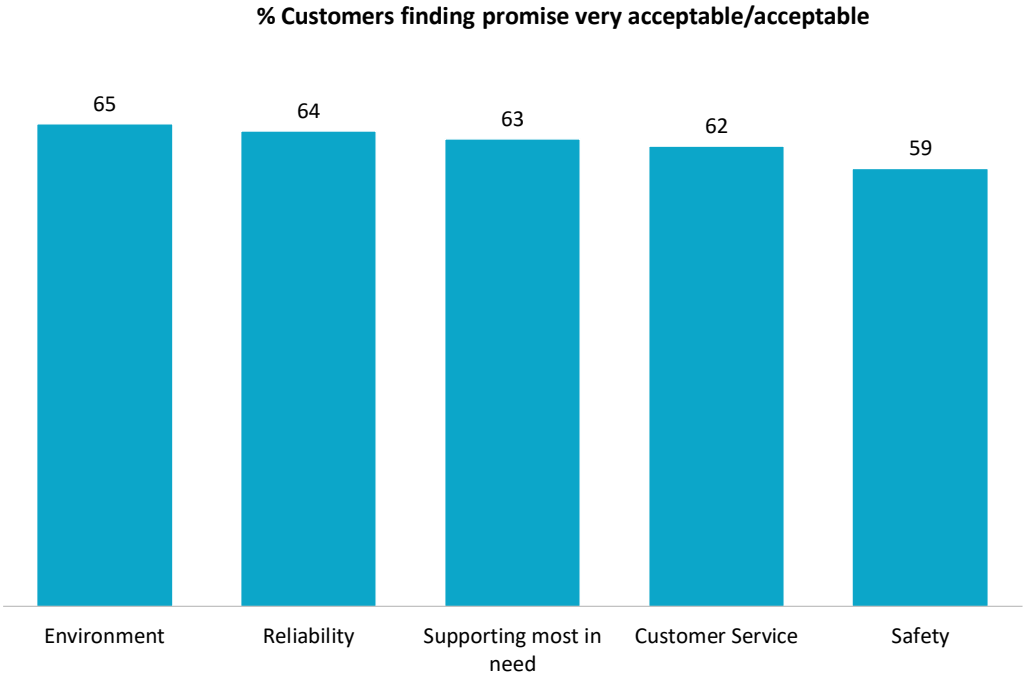
As indicated by Figure 4, Environment and Reliability are the performance areas which are more closely linked to high acceptability of the business plan. These are the performance areas receiving highest support among the group of domestic customers that find the plan very acceptable overall. Safety, on the other hand, has a weaker link to overall acceptability, suggesting it is more of a hygiene factor – viewed as absolutely

[7] Companies used a mix of approaches including presenting bill impacts in real and/or nominal terms Results are presented as set out in Ofwat's draft determinations. Source: Ofwat PR19 draft determinations https://www.ofwat.gov.uk/regulated-companies/price-review/2019-price-review/draft-determinations/.

central to what NGN does and a paramount requirement, but less likely to drive higher acceptability of the plan.

Full reporting of acceptability of the performance areas is covered in section 3.5.

Figure 4: Acceptability of promises among domestic customers finding the business plan very acceptable (*How acceptable do you find these promises?)*



This is supported by Table 13, which shows that outputs from the environment and reliability performance areas tend to receive highest support among customers who find the plan very acceptable overall. Supporting customers most in need is the area for which the proposed outputs tend to receive the lowest levels of support. However, it is important to note that acceptability is high across all performance areas and all performance commitments.

Full reporting of acceptability of the performance commitments is covered in section 3.6.

Table 13: Support for detailed outputs, ordered from most to least supported.

Output	% finding output very acceptable (all customers)	% finding output very acceptable (of customers finding BP very acceptable)	Performance area
Reducing Shrinkage and Leakage	93	100	Environment
Supply restoration following an unplanned interruption	94	99	Reliability
Delay to supply restoration overnight following an unplanned interruption	96	99	Reliability
Trained NGN engineers - Customer and Vulnerability Competency Framework	95	99	Most in need
Resolving complaints	95	99	Customer Service
Emergency response	95	98	Safety
Business carbon footprint	94	98	Environment
Use of recycled material	96	98	Environment
Amount of spoil to landfill	93	98	Environment
Emergency response standards - repair works, safety impact	90	97	Safety
Re-connecting appliances following an unplanned interruption	93	97	Reliability
Supply restoration following a planned interruption	92	97	Reliability
Notification in advance of planned interruptions	92	97	Reliability
Attending purge & relight jobs	88	97	Reliability
Major incidents	93	97	Reliability
Customer satisfaction with interruptions and connections	93	97	Customer Service
Raising awareness of carbon monoxide dangers	95	96	Most in need
Repair works, environment impact	93	95	Safety
Energy efficiency advice	90	95	Most in need
Raising awareness and reach of the Priority Services Register	92	94	Most in need
Alternative heating and cooking facilities during an unplanned interruption	89	93	Reliability
Reinstating customers` premises	91	93	Reliability
Community partnering fund	88	93	Most in need
Hardship fund	89	92	Most in need
Ongoing Public panel	90	92	Customer Service
Connecting fuel poor households	85	91	Most in need
Cyber	65	73	Safety

Of the very small number of customers dissatisfied with the plan, the reasons mostly relate to a desire for more ambition regarding the environmental targets, concern that the plan is not going beyond NGN's basic obligations or that the promises may lack substance.

"You don't seem to have grasped the urgency of a 100% transfer to renewables."

"Environmental reasons - move faster, be a persuader of your industry and government to move faster. You need to show you recognise the importance of climate change. The only reason I said the IT /cyber-attacks weren't good enough was because you didn't mention working with state actors etc but if you didn't for security reasons and are doing it then you are acceptable."

"These are things which they should be doing already and not in the years to come - we pay enough already, and bills go up every year, so they are not giving us anything."

"All you've done here is brag about how well you are doing. I've come across nothing out of the ordinary yet, just about what people who you employ carry out as a day's work and get paid for."

"As stated, never mind how you treat customers, you are by far the most expensive."

"It is all fancy words."

"Too woolly."

(Domestic customers)

"Profit is the number 1 factor in business - all other factors are of minor importance."

(Non-domestic customer)

Few stakeholders raise specific concerns about the plan. Those that do, relate to CO alarms, more stringent targets and greater focus on environmental impacts.

"CO alarms should not be supplied to the public without testing on installation and at least on an annual basis. The alarm manufacturers are fully aware of this as are the Trade Association but hide it due to the latent warrantee liabilities involved. However, two major alarm manufacturers AICO and Fire Angel now reference sensor inclusive testing in their manuals thanks to research carried out."

(Stakeholder - Business, Trade and Manufacturing Groups)

"I should like to argue for better targets in safety, customer satisfaction, payments for disruption. Low payments might mean you are not quite as concerned if there is disruption (especially if connected and then service drops). This could lead to tardiness etc".

(Stakeholder - Local Authority / LEP / Parish Council / Councillors)

"There is a climate emergency."

(Stakeholder - Charity / Third sector)

"The plan is not very ambitious - the environmental items I gave feedback on do not cover using natural gas driven vehicles in own fleet - reduces GHG emissions by 30% immediately (and they could at the same time be more efficient) and will be immensely cost effective given that you distribute the fuel yourselves; using hydrogen vehicles in the own fleet - not very cost effective just now, but innovative, future-proof and zero emissions; investment in energy poverty is too low and not ambitious enough, also does not tackle the real problem (energy inefficiency); leakage prevention: check for hydrogen compatibility before replacing pipes; reducing leakage by ~25% is not very ambitious - o.k., within 2026 range, but still, should be more like >50%, it's not like this comes as a surprise, you have known about the leakages for decades."

(Stakeholder - Education / Skills)

3.4 Affordability of the plan

Once customers have reviewed the business plan content, perceptions of affordability increase to 85% for domestic customers and 83% for non-domestic customers – both significant increases compared to customers' more spontaneous views. The proportion finding it unaffordable is very low at 3% for both domestic and non-domestic customers.

Figure 5: Informed affordability (*How affordable would this bill level be for you?)*

An even larger increase in perceived affordability is seen for future customers, increasing from 67% uninformed to 80% informed.

Table 14: Informed affordability of proposed bill level

	Domestic customers	Non-domestic customers	Future customers	All customer measure[8]
	%	%	%	%
Affordable (uninformed)	74%	77%	67%	74%
Affordable (informed)	85%	83%	80%	84%
Difference	+11	+6	+13	+10

Among domestic customers, the uplift in perceived affordability is most pronounced among lower income customers. Affordability of the plan for domestic customers earning less than £20,800 per annum increases by 14 percentage points, compared to an increase of just 6 percentage points for customers earning over £32,200.

Table 15: Informed affordability of proposed bill level – domestic customers by income

	Income				
	£10,400 or less	£10,401 - £20,800	£20,801 - £31,200	£31,201 - £52,000	£52,001+
Uninformed affordability	58%	70%	78%	84%	85%
Informed affordability	71%	84%	89%	90%	91%
Difference	+13	+14	+11	+6	+6

Domestic customers with some form of vulnerability are slightly less likely to feel the proposed bill would be affordable for them (82% vs 88% of those without a vulnerability).

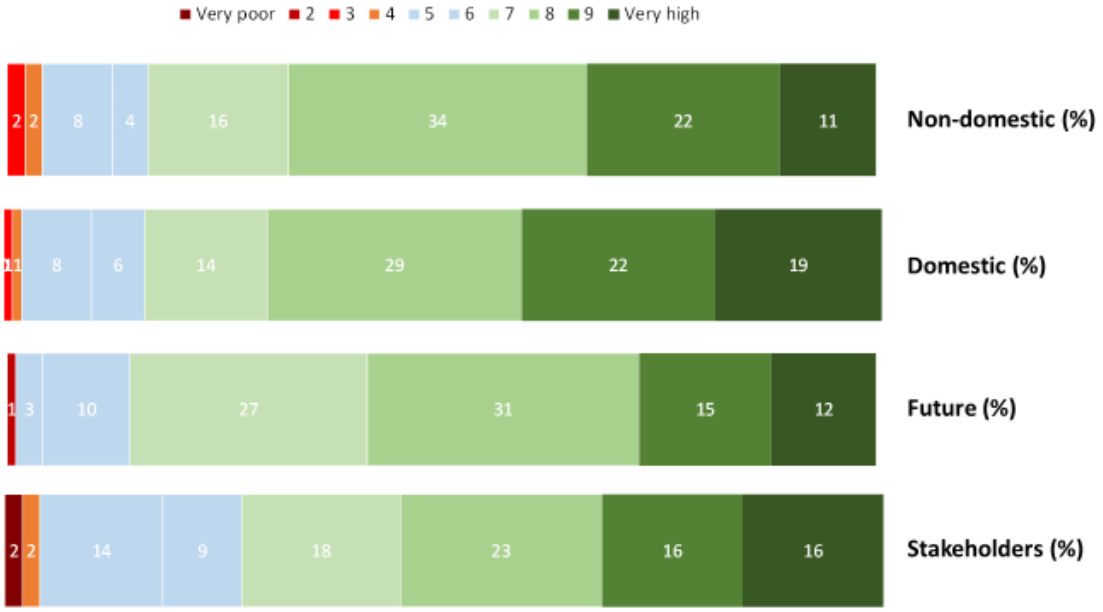
[8] The 'all customer' measure presents the aggregated result for all 'customers', including domestic customers, non-domestic customers and future customers.

Value for money

84% of both domestic customers and non-domestic customers feel that NGN's plans offer good value for money (scoring 7-10 out of 10). 2% of domestic customers and 4% of non-domestic customers feel it offers poor value for money (score 1-4).

A similar level of future customers (85%) also find the plan provides value for money. Three quarters (73%) of stakeholders believe it represents value for money, with 5% saying it is poor value for money.

Figure 6: Informed value for money (*How would you rate Northern Gas Networks` business plans and bills for 2021-2026 in terms of delivering value for money*?)

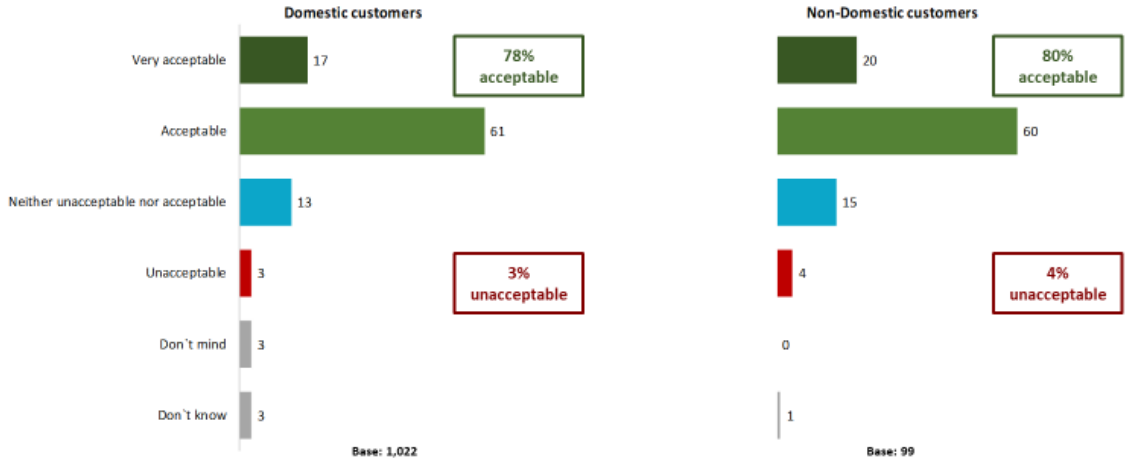


All subgroups of customers provide a high value for money rating, with the exception of digitally excluded domestic customers (71% vs. 85% who use the internet). Value for money ratings are the same across the three bill reduction levels tested.

3.5 Acceptability of current performance and promises

Customers were presented with information on NGN's current performance, against 52 performance measures. Around eight in ten customers find the current performance acceptable and only 3% of domestic and 4% of non-domestic customers find it unacceptable.

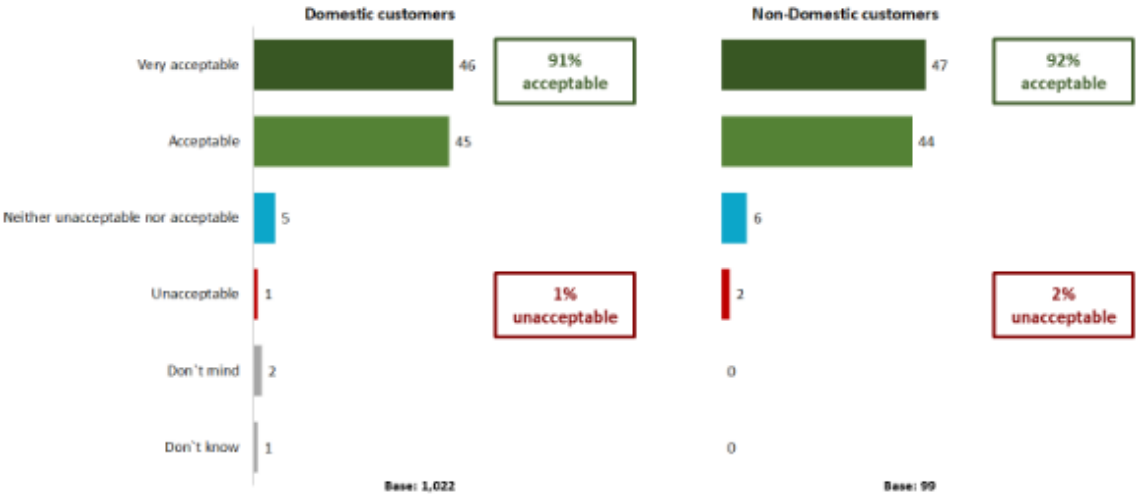
Figure 7: Acceptability of current performance (*How acceptable do you find Northern Gas Network's current performance to date?*)



Future customers and stakeholders also rate current performance highly; 85% of future customers believe current performance is acceptable and just 2% feel it is unacceptable. 82% of stakeholders find the current performance acceptable, while 7% find it unacceptable.

Customers were presented with the key promises set out in the Business Plan and around nine in ten find them acceptable. Only 1% of domestic and 2% of non-domestic customers find them unacceptable.

Figure 8: Acceptability of promises (*How acceptable do you find Northern Gas Network's promises?*)



Acceptability of the promises is even higher for future customers (97% and 1% unacceptable) but slightly lower for stakeholders (80% and 11% unacceptable).

When all customer groups are combined, acceptability of the promises is 92% (1% unacceptable).

Of domestic customers finding the promises acceptable, the most common reasons are that they are a comprehensive list covering the most important issues that NGN should be focusing on (46%) and that they focus on the customer (20%).

Non-domestic customers and future customers also support the promises for similar reasons. Future customers in particular support action that protects the environment – positive action in this area is seen to reflect well on the company brand.

"They are investing in pipes, people and reducing bills which is what we want."

"It covers most areas, obviously reducing bills, supporting people who need it, and improving the environment."

"There's a broad range of different things they're trying to achieve, and provided they do achieve these targets, it's an acceptable proposal."

(Non-domestic customers)

"The majority of the targets are targets that I find important. Addressing carbon monoxide and helping save the environment are the most important in my opinion."

"They are proposing to look after the customers and make the service better and keeping customers forefront of their mind by reducing their bills."

"I am I big believer in the movements being made to protect the environment, so I like this change. Saving money is always a benefit and the response times (if accurate) would create a sense of reliability and increase safety."

"The promises are all about improving reliability, decreasing bills, and giving extra compensation if things go wrong - these are very attractive promises. I also think it is essential to address the decreasing carbon footprint (as NGN have done) in their promises, as a lot of people are opting for companies that are more environmentally friendly."

"Many of the goals feel like they are actually actively helping the customer, like informing them of when they are entitled to compensation, rather than having an attitude that it would lose money to help the customer as many companies do."

"I would say that it's very acceptable, but I don't think enough emphasis has been placed on the environmental side of things. It seems low down in the priority list and is not as clear as the other promises, with less statistics. Surely the environment is the MOST important thing at thing point. But otherwise the points are very reassuring."[9]

(Future customers)

For stakeholders, the promises are perceived as a good balance that reflect stakeholders' main priorities. Some call for more ambition and greater focus on their area of interest before they can say the promises are very acceptable.

Very acceptable:

"It's a comprehensive list and addresses my key areas of concern: cost, service and the environment. Working in street works, I am also particularly pleased with number 3."

(Stakeholder - Highway Authorities)

"NGN have gone beyond their legal requirement for compensation and are a forward looking and modern company willing to change for the betterment of their customers and stakeholders."

(Stakeholder - Wider NGN workforce and supply chain)

"Clear commitment to low carbon future and to investment in network. I wonder if need to establish a systems approach to low carbon energy provision which considers utility provision as a whole but UK structure makes this more difficult."

(Stakeholder - Local Authority / LEP / Parish Council / Councillors)

Acceptable:

"A good balance of areas of focus that take into account immediate customer concerns such as price, service and care as well as being considerate about the environment and planning for the future."

(Stakeholder)

"I think all the promises are excellent and make sense, but It would be nice to see a promise about supporting the communities NGN serves."

(Stakeholder)

[9] It is unclear whether this customer interpreted the numbering of promises as an indication of importance (the promises were not in order of importance).

"I believe that the majority of the statements are positive and achievable. My only concern is the phrase 'strive to achieve 100 %' Until you can say you 'will' I cannot in good faith say very acceptable."

(Stakeholder)

"It's a broad spread of promises across a range of key areas and focuses on returning value to all and interposition yourself as a responsible and credible business in the region. It feels very achievable and it might be nice to see a bit more ambition in pushing yourselves to return even more value."

(Stakeholder)

Of the small proportion of customers/future customers not finding these acceptable, they relate to concerns that reductions will not be passed on to the customer, that promises need to be followed through with action, more ambition required on the environment and that the promises should be basic elements of the service not requiring a 'promise'.

"How can they reduce the bills and make those guarantees?"

"I'm still waiting for all these promises to materialise."

(Domestic customers)

"Because I don't know if any reduction will be passed on to me by the supplier."

"Anybody can make a promise. It's keeping that promise over time that is the key."

"These points are all things that should be routine requirements."

(Non-domestic customers)

"Purely for the fact you should and could be far more radical in attempting to go carbon free."

(Future customer)

The few stakeholders who do not find the promises acceptable cite concerns relating to testing of CO alarms, short-termism, insufficient focus on the environment or rural areas and scepticism towards safety performance.

"Carbon Monoxide Alarms MUST be sensor inclusively tested to ensure that they are still sensing gas. If you supply CO alarms to the public, you have a duty to ensure that they are working properly. The guidance of CO alarm manufacturers trade associations is biased with a vested interest."

(Stakeholder - Business, Trade and Manufacturing Group)

"Looks very short term. Insufficient attention to resilience to future scenarios (net zero CO2, sociodemographic change, extreme weather, distributed generation/storage/multi-vector decision making)."

(Stakeholder - Other)

"The current climate crisis and extinction event makes your minuscule greenwash phraseology look ludicrous."

(Stakeholder - Charity / Third sector)

"Should offer the service to more rural areas."

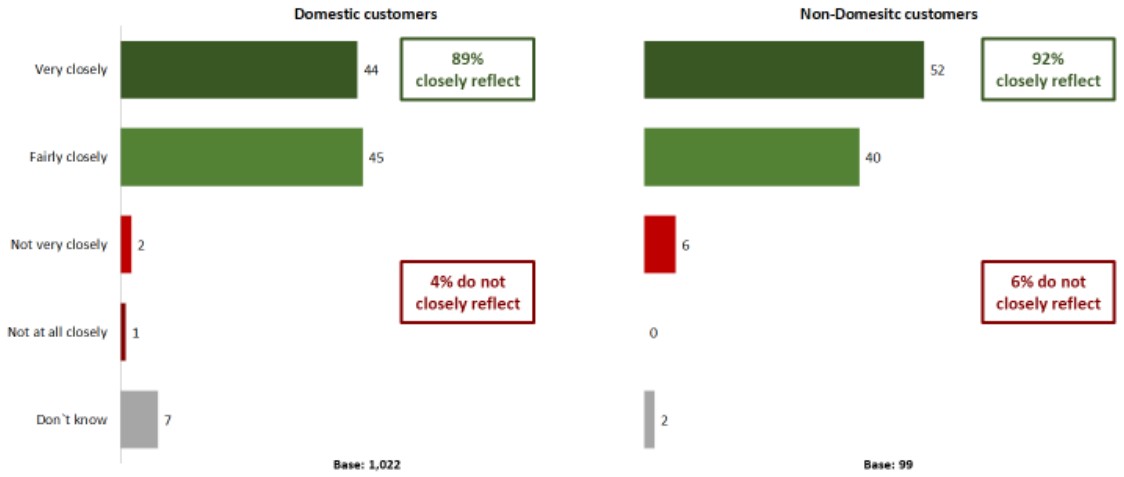
(Stakeholder - Developers / Housing / Landlords)

"I don't believe you. Did you have any responsibility for the massive gas explosion in or on the Wirral in the last couple of years. Or others across the North West?"

(Stakeholder - Local Authority / LEP / Parish Council / Councillors)

Customers strongly feel these promises reflect what they view to be most important for NGN to deliver. Around half of customers feel they reflect their priorities very closely.

Figure 9: ***How well do these promises reflect your views of what Northern Gas Networks should be delivering to customers?***



Future customers are similarly supporting, with 45% saying they reflect their priorities very closely and 50% fairly closely.

Nine in ten stakeholders feel they reflect their priorities very closely (50%) or fairly closely (39%).

The main ways in which domestic customers feel the promises could be improved are:

- Lower prices (31%)
- Keep to/act on promises (22%)
- None (17%)
- Better service (general)/ more innovation (9%)
- More help required for vulnerable/disabled/those on benefits (6%)
- Radical action needed on environment - move away from fossil fuels (4%)
- Better customer service - listen to needs (4%)
- More professional approach to upgrading infrastructure/reducing leaks (4%)
- Don't know (18%)

Sample size: 35 customers feeling the promises do not reflect their own views very closely or at all.

Similarly, non-domestic customers also call for reduced prices and for NGN to follow through on these promises and act on its word.

"Just do what you say as most companies still don't live up to them."

(Non-domestic customer)

Stakeholder views on how the promises could be improved:

"Wake up and recognise the scale of change that will happen and the timescale it will happen in."

(Stakeholder - Charity / Third sector)

"Invest in zero-carbon technologies (biogas, synthetic natural gas), invest in end user efficiency, invest in using the natural gas network for renewable electricity storage (power to gas), supply natural gas as a transport fuel."

(Stakeholder - Education / Skills)

"Don't ignore rural areas."

(Stakeholder - Developers / Housing / Landlords)

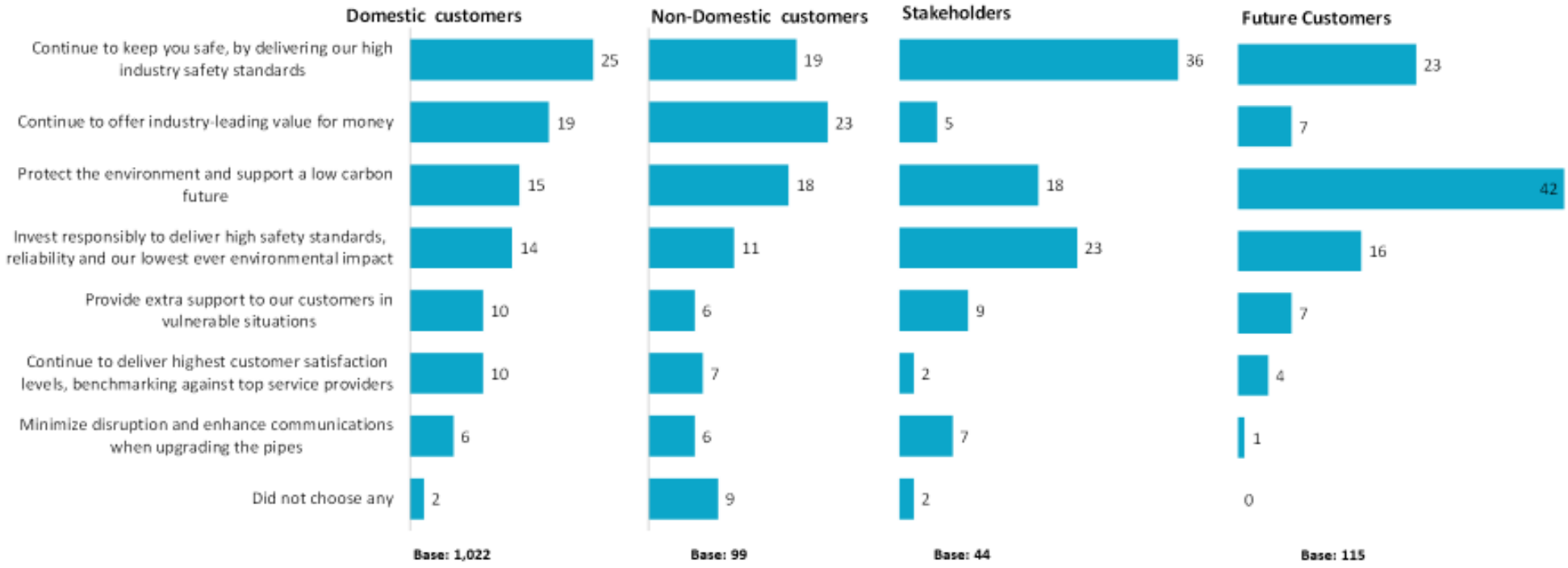
As indicated in Figure 10, Safety is deemed to be one of the most important priorities for NGN to focus on, being rated in the top two priorities by all groups (and top for domestic customers and stakeholders).

- Domestic customers prioritise safety first (25% rating the top priority), followed by value for money (19%)
- Non-domestic customers prioritise value for money (23%), slightly ahead of safety (19%) and the environment (18%)

- Stakeholders prioritise safety first and foremost (36%), followed by investing in future infrastructure (23%) and the environment (18%)
- Future customers are most likely to prioritise the environment (42%) and then safety (23%)

Customer satisfaction, minimising disruption and supporting the most in need are considered the lowest priorities, with each being selected by one in ten or fewer as the top priority.

Figure 10: Areas selected as the top priority for NGN to focus on (*Having learnt about Northern Gas Networks' seven key promises, which of these do you consider to be the highest priorities for NGN to focus on?*)



3.6 Acceptability of performance commitments

Customers and stakeholders were shown details of NGN's key promises in each of its five main performance areas; safety, reliability, supporting customers most in need, customer service and protecting the environment. Acceptability is high across all of the five areas.

Customers – current and future - find the reliability promises most acceptable, and least so for protecting customers most in need. Stakeholders also find the promises around reliability the most acceptable but find safety least acceptable. The environment promises receive the highest level of unacceptable scores (14%).

Table 16: Acceptability of performance areas (ranking of performance area included in brackets)

Performance area	Domestic customers		Non-Domestic customers		Future customers		Stakeholders	
	Acceptable	Unacceptable	Acceptable	Unacceptable	Acceptable	Unacceptable	Acceptable	Unacceptable
Reliability	89% (1)	1%	90% (1)	1%	94% (1)	0%	84% (1)	2%
Customer service	87% (2)	0%	88% (3)	2%	91% (=3)	1%	82% (2)	5%
Safety	86% (3)	1%	89% (2)	3%	92% (2)	0%	77% (5)	9%
Environment	85% (=4)	1%	82% (4)	4%	91% (=3)	3%	80% (=3)	14%
Supporting the most in need	85% (=4)	2%	80% (5)	3%	85% (5)	0%	80% (=3)	5%

The following section presents the results for the individual outputs presented to customers, including the proportion of customers that understand the proposed output and, of those who understand it, whether they support it or not.

Reliability

We will invest in our infrastructure, working 24 hours a day to keep the network running smoothly and minimising any impact on you when there are interruptions, by:

Improving what we do now	New approaches we will introduce
• Making a further £500m investment to replace old iron pipes with modern plastic alternatives • Providing a longer notice period before any planned interruptions – seven days instead of five; • Continuing to make a compensation payment if we don't get the customer back on gas the same day following an unplanned interruption – a voluntary standard; and • Paying over and above the statutory compensation payment levels for both planned and unplanned interruptions	• Using newly developed techniques to detect leaks faster, such as acoustic cameras and sniffer dogs; and • Introducing new voluntary standards and compensation payments if we don't reconnect a customer's appliances within set timescales for both planned and unplanned interruptions. • Providing a suite of extra customer support during large gas interruption incidents.

Just 1% of domestic customers and non-domestic find these promises unacceptable, mainly due to:

- The cost/too expensive
- Needing more information or finding it too soon to tell
- Not believing the promises will be delivered.

Some future customers want more information on the environmental impact of using plastic pipes.

"Is there an alternative or more eco-friendly to the plastic pipes? I would like more information on this, as environmental issues seem to be at the centre of NGN."

(Future Customer, Female)

"I'd be interested to know the advantages of plastic pipes given their environmental impact."

(Future Customer, Male)

"There's a focus on improving the environmental impact, however they're replacing old pipes with plastic pipes...if there is an alternative piping material to plastic I would strongly suggest using it to reduce the environmental impact further - 37,000km of plastic pipes is an awful lot of plastic."

(Future Customer, Male)

The 2% of stakeholders that find the promises unacceptable do so for the following reasons.

> **"Put focus on improving reliability performance. But when interruptions occur, provide clear communication, explain customers what, why and when. But do not pay money for service interruptions. Use that money to improve your network."**
>
> (Stakeholder - Gas Control Equipment supplier)

Customer (current and future) and stakeholder support for the detailed reliability outputs is presented in Table 17.

Table 17: Customer support for the detailed reliability outputs

	Domestic					Non-Domestic					Stakeholders					Future customer				
Output	Base	Under-stand	Support			Base	Under-stand	Support			Base	Under-stand	Support			Base	Under-stand	Support		
			Yes	No	DK			Yes	No	DK			Yes	No	DK			Yes	No	DK
Unplanned interruptions																				
Delay to supply restoration overnight following an unplanned interruption	263	96%	96%	2%	3%	22	95%	86%	5%	10%	16	100%	81%	13%	6%	31	100%	97%	0%	3%
Supply restoration following an unplanned interruption	227	94%	94%	1%	5%	25	100%	88%	8%	4%	16	94%	93%	0%	7%	30	93%	89%	0%	11%
Re-connecting appliances following an unplanned interruption	249	95%	93%	2%	5%	28	96%	100%	0%	0%	16	100%	81%	13%	6%	26	92%	83%	4%	13%

	Domestic					Non-Domestic					Stakeholders					Future customer				
Output	Base	Under-stand	Support			Base	Under-stand	Support			Base	Under-stand	Support			Base	Under-stand	Support		
			Yes	No	DK			Yes	No	DK			Yes	No	DK			Yes	No	DK
Alternative heating and cooking facilities during an unplanned interruption	273	97%	89%	2%	9%	24	100%	96%	4%	0%	16	100%	81%	6%	13%	28	93%	96%	0%	4%
Planned interruptions																				
Major incident response	232	96%	93%	2%	4%	23	100%	100%	0%	0%	16	94%	80%	13%	7%	21	90%	84%	16%	0%
Notification in advance of planned interruptions	195	98%	92%	2%	6%	18	100%	94%	6%	0%	16	94%	87%	0%	13%	20	95%	89%	0%	11%
Supply restoration following a planned interruption	158	96%	92%	4%	4%	17	100%	88%	12%	0%	16	94%	87%	0%	13%	12	100%	92%	0%	8%

	Domestic					Non-Domestic					Stakeholders					Future customer				
Output	Base	Under-stand	Support			Base	Under-stand	Support			Base	Under-stand	Support			Base	Under-stand	Support		
			Yes	No	DK			Yes	No	DK			Yes	No	DK			Yes	No	DK
Reinstating the condition of customers' premises after a planned interruption	206	95%	91%	3%	5%	19	100%	68%	21%	11%	16	94%	80%	13%	7%	35	97%	91%	9%	0%
Time slot for attending purge & relight jobs	231	97%	88%	2%	10%	22	100%	86%	5%	9%	16	94%	87%	7%	7%	27	96%	81%	8%	12%

Customer Service

We will continue to enhance customer experience and maintain our position as the UK's best performing Gas Distributor for customer satisfaction, by:

Improving what we do now	New approaches we will introduce
• Maintaining our industry leading customer satisfaction performance; • Providing outstanding service to all our customers at each step of their journey with us. If we fail, we pay; • Aiming to resolve compaints within an hour, even on weekends – above the statuatory requirements; • Producing an annual, publicly available report of outcomes and benefits delivered to customers; and • Continuing our independent board to scrutinise how well we are responding to customer needs	• Offering customers 2-hour appointment slots for engineering visits if they are not home, and an engineer tracking option to check they are on time; • Holding quarterly meeting of our Customer Panel to provide customer input to and scrutiny of our decision making, supported by an independent board and annual reporting; and • Providing a key account service and time-bound standards for Market Services customer (gas shippers, gas suppliers and Independent gas producers) to resolve their queries

Less than 1% of domestic customers and 2% of non-domestic customers find these promises unacceptable, mainly due to:

- Current service levels not being good enough
- Call centres being abroad (it should be noted that NGN call centres are not overseas)
- Wanting greater emphasis on lowering energy costs

The 5% of stakeholders that find the promises unacceptable do so for the following reasons.

"They do not make notice of Government targets to reduce gas installation of heating appliances.

(Stakeholder - Local Authority / LEP / Parish Council / Councillors)

"Depending on our role within the company (as field engineers) for them (customers) to track us (this is currently done by our line managers/supervisors) then I don't see why a customer needs to know an address I went to before them (possibly on an escape) as does this not contravene GDPR??."

(Stakeholder - Wider NGN workforce and supply chain)

Customer (current and future) and stakeholder support for the detailed customer service outputs is presented in Table 18Table 17.

Table 18: Customer support for the detailed customer service outputs

	Domestic					Non-Domestic					Stakeholders					Future customer				
Output	Base	Understand	Support			Base	Understand	Support			Base	Under-stand	Support			Base	Under-stand	Support		
			Yes	No	DK			Yes	No	DK			Yes	No	DK			Yes	No	DK
Resolving complaints	326	97%	95%	1%	4%	40	98%	90%	3%	8%	16	94%	100%	0%	0%	40	98%	87%	8%	5%
Customer satisfaction with interruptions and connections	362	95%	93%	1%	5%	31	100%	94%	6%	0%	16	94%	93%	7%	0%	41	93%	92%	0%	8%
Ongoing Public panel	334	96%	90%	1%	9%	28	100%	100%	0%	0%	16	94%	100%	0%	0%	34	94%	81%	3%	16%

Safety

We will invest in our network to make it safer and less prone to leaks and continue to improve our industry-leading emergency response and repair service, by:

Improving what we do now	New approaches we will introduce
• Increase the percentage of repairs we complete within 12 hours; • Continuing with the current target of attending 97% of all gas escapes within 1 and 2 hour emergency response standards; • Raising awareness of carbon monoxide (CO) dangers by continuing to train our engineers to give safety advice during daily customer contacts, training 100 community partners per year in CO safety and reaching 100,000 customers via initiatives; and • We will increase expenditure on our cyber resilience programme to improve NGN's ability to prepare for, respond to and recover from cyber attacks	• Providing free carbon monoxide detectors to all new domestic connections to the network

1% of domestic customers and 3% of non-domestic customers find these promises unacceptable, mainly due to:

- CO detectors should be provided to all customers
- CO detectors should not be provided/to new customers (e.g. older properties are more at risk)
- Expectation that promises will not be kept (profit motive conflicts)

Some future customers want more detail on why cyber is a priority.

> **"More information does need to be provided to customers about how exactly they wish to spend money on protecting the company from cyber-attacks. I am not sure if this proposal is entirely necessary except to protect customers' data which should already be a big priority."**
>
> (Future customer, Female)

The 9% of stakeholders that find the promises unacceptable do so for the following reasons.

"You cannot supply CO alarms without knowing that they are working on installation or during the warrantee period for the alarm. They should be sensor inclusively tested on installation and at least annually thereafter."

(Stakeholder - Business, Trade and Manufacturing Groups)

"These promises are weak and lily-livered."

(Stakeholder - Local Authority / LEP / Parish Council / Councillors)

"What about offering a new supply to rural areas without gas?"

(Stakeholder - Developers / Housing / Landlords)

"We should provide all low income and also vulnerable customers these [CO alarms], instead of supplying them only to the new connections!"

(Stakeholder - Wider NGN workforce and supply chain)

Customer (current and future) and stakeholder support for the detailed safety outputs is presented in Table 19Table 17.

The Cyber and IT Resilience performance commitment receives the lowest level of support (65% domestic; 79% non-domestic; 63% stakeholders and 77% future customers) across the safety area but also from across all performance areas. However, it should be noted that the wording for this performance commitment was on whether customers and stakeholders deem it to be *sufficient*, rather than a measure of support.

There is nothing to suggest this output is particularly rejected by customers or stakeholders. The proportion of customer that feel it is not sufficient is relatively low (4% domestic, 5% future, 0% non-domestic and 13% of stakeholders). Rather, high proportions give a 'don't know' response, suggesting that they feel unable to comment on this particular initiative. This performance commitment may need clearer articulation to help customers understand what it will involve and will deliver. Some future customers in particular, question what particular cyber threats NGN might face.

A higher proportion of stakeholders (13%) feel the initiative is insufficient but none of the open text responses explaining why the safety promises are unacceptable make reference to cyber security (concerns are more related to CO alarms).

Table 19: Customer support for the detailed safety outputs

	Domestic					Non-Domestic					Stakeholders					Future customer				
Output	Base	Under-stand	Support			Base	Under-stand	Support			Base	Under-stand	Support			Base	Under-stand	Support		
			Yes	No	DK			Yes	No	DK			Yes	No	DK			Yes	No	DK
Emergency response standards	268	94%	95%	1%	4%	19	100%	89%	11%	0%	16	100%	75%	19%	6%	32	92%	93%	3%	3%
Repair works, environment impact	248	87%	93%	3%	4%	29	100%	83%	10%	7%	16	94%	73%	20%	7%	33	85%	79%	7%	14%
Emergency response standards – repair works, safety impact	257	89%	90%	2%	7%	27	100%	89%	7%	4%	16	100%	69%	25%	6%	26	88%	83%	4%	13%
Cyber and IT Resilience[10]	249	84%	65%	4%	31%	24	100%	79%	0%	21%	16	100%	63%	13%	25%	24	92%	77%	5%	18%

[10] Customers were asked if they felt what was being proposed for cyber was sufficient.

Environment

We wil reduce our environmental impact to its lowest ever levels, while putting the foundations in place for a sustainable low carbon future, by:

Improving what we do now	New approaches we will introduce
• Continuing our strong performance levels on reducing the amount of gas that is lost from our network, aiming to reduce gas loss by a further 23% (on top of the 23% reduction forecast for 2013-2021); • Reducing our Business carbon footprint by 25% compared to 2017/18, by reducing mileage and improving energy efficiency of existing sites; • Increasing use of recycled materials in refilling excavated roadworks so that 97.5% of all material is from recycled sources; and • Reducing the amount of excavated material sent to landfill to less than 0.1% of all material disposed of	• Preparing an Environmental Action Plan for 2012-26, outlining how we will reduce the environmental impacts of our business, decarbonise the energy network and facilitate the transition to a flexible, sustainable, low carbon energy system; • Exploring afforable, greener energy solutions, including developing hydrogen as a low cost, low carbon future fuel; and • Setting a definite end to unburned methane flowing to the atmosphere from gas escapes by introducing time-bound permanent repair standards

1% of domestic customers and 4% of non-domestic customers find these promises unacceptable, mainly due to:

- Not doing enough - need higher targets/shorter timeframes
- Promises haven't materialised
- Gas focus of the business incompatible with environmental improvement
- Need to be more definite - radical action/change required
- Prices too high – lower energy costs are more important than environment
- Not NGN's responsibility - should be wholesaler's
- Zero leaks required
- No evidence global warming is real
- More and quicker action is needed by NGN

The 14% of stakeholders that find the promises unacceptable do so for the following reasons.

"How are you delivering hydrogen? Is this adding more cost, more carbon?

(Stakeholder - Business, Trade and Manufacturing Groups)

"Insufficient effort to meet the challenges of climate change."

(Stakeholder - Other)

"Nowhere approaching a proportionate response; need to do much more much faster."

(Stakeholder - Charity / Third sector)

"I find the measures weak in view of the large steps we need to take towards de-carbonisation; gas leaks should be a priority, as well as developing biogas schemes and waste gasification to explore and exploit the full renewable methane potential; hydrogen has to come from renewable sources - the government scheme to source steam methane reforming hydrogen from natural gas to decarbonise the gas grids is utter rubbish; you will need a proper plan to integrate power-to-gas technologies into your grids, also including synthetic methane."

(Stakeholder - Education / Skills)

Future customers that feel the environment promises are unacceptable seek more stretching targets and quicker action.

"Change is far too slow. There is not time. I am willing to accept many disruptions and costs if it means not causing further global environmental disaster. That will ruin my barely begun life."

"Should be actively seeking to do more."

"Could be doing more."

(Future customers)

Customer (current and future) and stakeholder support for the detailed environment outputs is presented in Table 20Table 17.

Table 20: Customer support for the detailed environment outputs

	Domestic					Non-Domestic					Stakeholders					Future customer				
Output	Base	Understand	Support			Base	Understand	Support			Base	Under-stand	Support			Base	Under-stand	Support		
			Yes	No	DK			Yes	No	DK			Yes	No	DK			Yes	No	DK
Use of recycled material	235	97%	96%	2%	1%	21	100%	100%	0%	0%	28	96%	96%	4%	0%	16	88%	93%	0%	7%
Business carbon footprint	271	96%	94%	1%	4%	30	97%	97%	0%	3%	28	96%	93%	7%	0%	20	100%	95%	0%	5%
Reducing Shrinkage and Leakage	246	94%	93%	3%	4%	28	100%	96%	4%	0%	28	96%	89%	7%	4%	21	100%	95%	0%	5%
Amount of spoil to landfill	270	97%	93%	1%	6%	20	95%	95%	5%	0%	28	96%	96%	4%	0%	17	100%	88%	0%	12%

Supporting customers most in need

We offer far-reaching extra support to customers who need it, by:

Improving what we do now	New approaches we will introduce
• Connecting at least 1,000 fuel poor households to the gas network each year, saving them £350 per year on their energy bills; • Offering face to face meetings to customers on our Priority Service Register when there are planned works to understand how we can further help them; • Providing a £50,000 fund each year that community organisations can use to develop community schemes; and • Notifying all customers experiencing a vulnerability 15 working days prior to the start of planned work	• Introducing a hardship fund of £30,000 per year, using strict criteria to help customers most in need of financial support; • Introducing a dedicated 24/7 support hotline, for any customer on the Priority Services Register, or who might identify themselves as vulnerable; and • Training all our customer-facing staff to spot and act on vulnerability as part of our Customer and Vulnerability Competency Framework

2% of domestic customers and 3% of non-domestic customers find these promises unacceptable, mainly due to:

- Don't want to subsidise other people - they should pay for/support themselves
- £30,000 isn't enough
- Target is too ambitious - need to see plan in action
- Insufficient financial support for vulnerable customers
- Not NGN's responsibility - up to Government/supplier
- Not believable
- We need lower energy prices, not promises

The 5% of stakeholders that find the promises unacceptable do so for the following reasons.

"More effort on behalf of customers rather than garnering profit for shareholders."

(Stakeholder - Local Authority / LEP / Parish Council / Councillors)

"15 + 30 grand is far too low to target energy poverty whereas on the other side you give such households a £350 a year discount?"

(Stakeholder - Education / Skills)

Customer (current and future) and stakeholder support for the detailed outputs for supporting customers most in need is presented in Table 21Table 17.

Table 21: Customer support for the detailed customers in need outputs

	Domestic					Non-Domestic					Stakeholders					Future customer				
Output	Base	Under-stand	Support			Base	Under-stand	Support			Base	Under-stand	Support			Base	Under-stand	Support		
			Yes	No	DK			Yes	No	DK			Yes	No	DK			Yes	No	DK
Raising awareness of carbon monoxide dangers	127	91%	95%	1%	4%	13	100%	100%	0%	0%	17	100%	82%	18%	0%	15	100%	93%	0%	7%
Trained NGN engineers – Customer and Vulnerability Competency Framework	160	97%	95%	0%	5%	11	100%	100%	0%	0%	17	100%	94%	6%	0%	21	95%	90%	0%	10%

	Domestic					Non-Domestic					Stakeholders					Future customer				
Output	Base	Under-stand	Support			Base	Under-stand	Support			Base	Under-stand	Support			Base	Under-stand	Support		
			Yes	No	DK			Yes	No	DK			Yes	No	DK			Yes	No	DK
Raising awareness and reach of the Priority Services Register	154	94%	92%	4%	5%	11	100%	91%	0%	9%	17	100%	94%	6%	0%	20	95%	100%	0%	0%
Energy efficiency advice	141	96%	90%	1%	9%	18	100%	94%	6%	0%	17	100%	94%	6%	0%	9	100%	89%	11%	0%
Hardship fund	134	97%	89%	4%	8%	15	93%	79%	14%	7%	17	100%	82%	12%	6%	13	100%	85%	0%	15%
Community partnering fund	164	92%	88%	3%	9%	16	100%	88%	6%	6%	17	100%	94%	6%	0%	19	95%	94%	6%	0%

	Domestic					Non-Domestic					Stakeholders					Future customer				
Output	Base	Under-stand	Support			Base	Under-stand	Support			Base	Under-stand	Support			Base	Under-stand	Support		
			Yes	No	DK			Yes	No	DK			Yes	No	DK			Yes	No	DK
Connecting fuel poor households	142	92%	85%	4%	11%	15	93%	71%	21%	7%	17	100%	94%	6%	0%	18	94%	88%	6%	6%

3.7 Detailed environmental action plan

This section covers future customer views towards specific actions contained within NGN's Environmental Action Plan. These findings are taken from an online discussion board with future customers.

These environmental actions were not fully developed when the acceptability survey commenced for current customers and stakeholders and were therefore not tested with those groups.

Reducing the impact of NGN's vehicle fleet

NGN is committing to:

- *100% of its company cars and at least 15% of its commercial vehicle fleet being ultra-low emission or hybrid by the end of 2026.*
- *Ensuring that 100% of its diesel commercial vehicle fleet meet the latest emission standards (Euro 6 or cleaner) by 2026*
- *Installation of electric vehicle charging infrastructure across all of its offices and depots*

Future customers recognise the important role of reducing the environmental impact of NGN's fleet and widely support the initiative. They see it as important for an energy company to take the lead on reducing environmental impact.

"It's a great start in reducing the company's carbon footprint. I think it is the kind of action NGN should be taking as any little done to reduce the impact on the environment is good."

(Future customer, Female)

"I think that it is important for companies, particularly those that work in supplying means of power, set the standard for the use of greener alternatives in everyday life… Any positive actions towards greener energy use and the means for the expansion of this are suitable levels of action and provide a benchmark to push even further forwards in the future. Starting small also allows for targets to be met realistically."

(Future **customer**, Male)

While it is viewed as forward thinking there is, however, a desire for quicker action and greater ambition in tackling this element of NGN's environmental impact.

"I think it is a good start, but I'd like to see more than 15% as no doubt it is their commercial vehicle fleet which contributes the most to emissions. I think it is definitely the kind of action they should be taking as it is leading the way in a more sustainable future."

(Future customer, Female)

"With all environmental protection initiatives, the more, the sooner, the better, but I think this plan strikes the right balance between ambitious and achievable."

(Future customer, Female)

"I would like more action to be taken if possible, as protecting the environment is more important than profit. You could aim for a percentage of electric cars instead of just hybrid."

(Future customer, Male)

Tree-planting programme

Northern Gas Networks will self-fund the planting of 40,000 trees in its area as part of the Northern Forest.

In recognition of the benefits that tree planting can deliver to improving air quality, in health and wellbeing, flood risk management and absorbing carbon from the atmosphere, NGN commit to the planting of 40,000 trees in the designated Northern Forest areas in its network area between 2021-2026. A significant proportion of these trees will be planted in urban areas. NGN commit to funding this from its own sources (i.e. through shareholder funding rather than via money paid by customers through their gas bills).

The tree-planting programme receives overwhelming support from future customers and is considered an exciting initiative. Future customers consider it a positive step to balance the negative environmental impact of the company – something NGN is perceived to have a responsibility to do as a company profiting from a finite natural resource. The focus on the local region is also liked.

The fact that it is funded through shareholders rather than via bills is particularly welcomed and reflects well on the company image. This also shows that the action is being carried out with the right motives.

"I think this is a very good initiative, and I think it will be well-received that NGN is using shareholder funding to do it, as it makes it feel like the initiative comes from genuine concern for the environment rather than a PR stunt."

(Future customer, Female)

"I think this is a brilliant initiative! This is one thing which really has been needed for years but is overlooked by other environmental issues […] This initiative makes me have faith in this company as they are willing to use funding from their own sources."

(Future customer, Female)

"This initiative impresses me more than the previous, it's really focused on giving back whilst highlighting the beauty of the Northern environment and its landscape […] It makes me think that NGN really care about the community and our land. I'd love to know specifically where and what kinds of tree."

(Future customer, Female)

Future customers also show an appetite to know more of the details, such as which specific locations would benefit and how they are identified and selected.

"This is a really excellent initiative. It really shows that NGN want to improve life for everyone as I think most urban areas are probably in desperate need of more vegetation. It is also really great how they are committing to the funding, and they are willing to lose out in the short term to improve their reputation and the environment in the long term. I would maybe just want to know that they are working together with councils to place them in areas they will be appreciated and looked after."

(Future customer, Male)

Other Environmental Actions

A number of other initiatives contained within the environmental action plan were also presented to future customers (Figure 11).

Figure 11: NGN Environmental actions

- Self-fund the planting of 40,000 trees in the NGN network area as part of the Northern Forest
- 100% of NGN company cars will be ultra low emission or hybrid, with electric vehicle charging infrastructure installed across all offices and depots
- Renewal of NGN's commercial vehicle fleet with newer, more efficient vans, with at least 15% being ultra low emission vehicles
- Reduce gas loss across NGN's network by 27% between 2021-2026
- Increase the scale of renewable energy generation on NGN sites threefold to deliver an overall 10% reduction in total electricity consumption via on-site renewables
- Purchase of 100% renewable electricity for our metered electricity consumption and source a proportion of our shrinkage gas from green gas sources
- Reduce Business Carbon Footprint by 25% from 2017/18 levels by the end of 2026

Seeing this action plan makes future customers positive and hopeful about the future of their region. it shows that NGN is taking a lead on carbon reduction that future customers feel others could follow.

The plans are also felt to be transparent and realistic in terms of what can be achieved in the RIIO-2 timescale.

"I think all these steps are a positive step forward in having a cleaner, greener environment. My hopes have increased knowing that companies are actively seeking to improve the environment and reduce their impact."

(Future customer, Female)

"I think all these plans are excellent with a reasonable time scale. Not many companies are this open on how they plan on being more sustainable and creating a cleaner Britain. NGN are setting realistic targets which other companies should follow as they are currently setting a great example. I have high hopes that NGN will help protect our rich Northern environment."

(Future customer, Male)

"As someone who cares for the environment and wants to see more companies making effort to reduce climate change, I like to see that this company has a clear idea of how they want to do so. they have created a clear outline of what they want to achieve and when they want to achieve this target by."

(Future customer, Female)

However, while realistic, some future customers want NGN to go further and set targets that go above and beyond those set out in the plan. Some also feel that NGN could use its position to positively influence others in the sector that also have significant environmental impacts.

"It is good to see a large company making positive pledges, but I'd like to see more done in the timescale of 2026. Action needs to start to be taken now. I'm still pessimistic in my hopes for the environment. While I think these plans will help, they are nowhere near enough to protect the environment. A pledge to pressure gas suppliers to develop cleaner alternatives."

(Future customer, Male)

Overall, future customers are positive about the future of gas in their region having seen NGN's plans.

"[I feel] Much more positive than I did initially. I now know the ethos of NGN and what they hope to achieve, including how dedicated they are in tackling climate change and keeping the standards of the Northern Environment high. They are making great moves in terms of caring for the customer."

(Future customer, Female)

"Feel like it has a strong future with a company that is actually committed and accountable to deliver improvements to the environment and customers' lives. I

hope these changes and additions will have a really positive impact on the North. Thank you to committing to these proposals and being so open about the changes you want to make. I hope you stick to all of these and also have an impact on other companies who should be reflecting on their environmental impact and their customers."

(Future customer, Male)

"I feel positive, hopeful and optimistic about these proposals for the future. I hope that all these aims are met. My final message would be one of encouragement. Everything I have seen and heard so far has given me a positive view of NGN so well done to all and keep it up!"

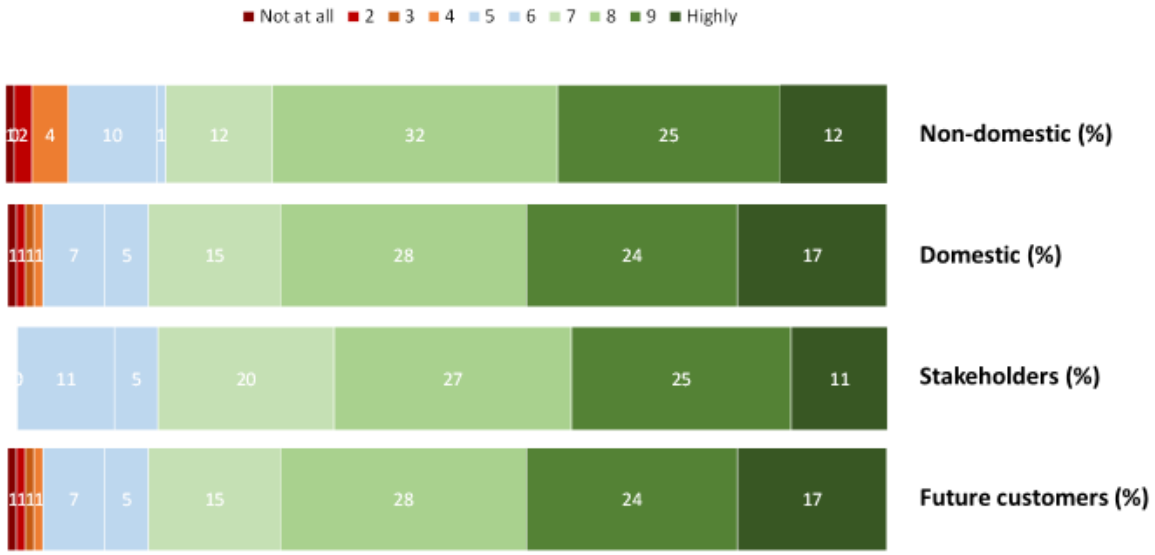
(Future customer, Female)

3.8 Trust in NGN to deliver

Trust in NGN to deliver the plan is strong; 85% of domestic customers trust NGN to deliver it; 12% give a neutral response and just 3% have a limited amount of trust. For non-domestic customers, 82% trust, 11% give a neutral response and 7% have a limited amount of trust.

88% of future customer trust NGN to deliver and only 2% lack trust (the remainder are neutral). Stakeholders are also very positive; 84% trust NGN will deliver and the remaining 16% are neutral.

Figure 12: Trust in NGN to deliver (*Having learnt more about the draft Business Plan how strongly would you say you trust Northern Gas Networks to deliver the plan?*)



Of domestic customers lacking trust in NGN (scoring 0-4), the most common reasons given include:

- Plan not achievable or realistic in timescale (24%)

- Private companies focus on profits/shareholders/bonuses (20%)
- Could be empty words/hype (17%)
- Not (entirely) reliable/trustworthy (17%)
- Bills too high/should be reduced (13%)
- Don't want costs to increase (10%)
- Haven't been able to deliver service/targets to date (9%)

Non-domestic customers also list the profit motive as a barrier to delivering environmental or customer-focused targets, as well as negative perceptions of energy companies delivering against promises.

The small proportion of future customers lacking trust in NGN to deliver the plan, tend to be sceptical, either that price reductions will be possible or that the targets can be met.

"Companies often make promises they don't keep."

"One thing saying it, another thing putting it into action."

"Because it seems a little too good to be true."

"Because gas networks are costing more due to Brexit."

"These are ambitious targets and I'm not sure if they are obtainable."

(Future customers scoring 3-5 out of 10)

No stakeholders give a trust score of less than 5. Those scoring 5 give the following reasons.

"Too many outside factors that could have detrimental influences."

(Stakeholder - Developers / Housing / Landlords)

"I would like to know more HOW you propose to deliver on promises - not just stating promises."

(Stakeholder - Business, Trade and Manufacturing Groups)

"The plan is not very ambitious so that I have my doubts as to the performance of NGN"

(Stakeholder - Education / Skills)

But many stakeholders place trust in NGN due to its past performance and their experience of previous delivery.

"Having worked with NGN for the past 16 years, I would trust them to deliver on their promises."

(Stakeholder - Utility Infrastructure Provider)

"I highly trust that they will deliver the business plan. Some aspects of it are ambitious."

(Stakeholder - Community Interest Company)

"It appears that NGN has a strong history of delivering against its priorities and has set realistic but measurable future promises."

(Stakeholder - Health & Emergency Services Providers)

Appendix A

Survey questionnaire

Survey questionnaires can be found in a separate file titled ‘NGN RIIO-2 Business Plan Acceptability Testing Questionnaires’.