

SOCIAL PIONEER REPORT

Report

Prepared for **NGN**
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06 September 2019
Project No: 900



BACKGROUND AND OBJECTIVES

IMPACT

FROM INSIGHT TO INFLUENCE

PROJECT BACKGROUND

Stakeholder vision and strategy

NGN have an aspiration to become the UK's most loved, admired and respected company. To achieve this, they make stakeholder engagement is an essential part of everything they do and a key driving factor behind their decisions. NGN seek to genuinely reflect stakeholders' values, preferences and ideas in their business planning cycle in a meaningful way.

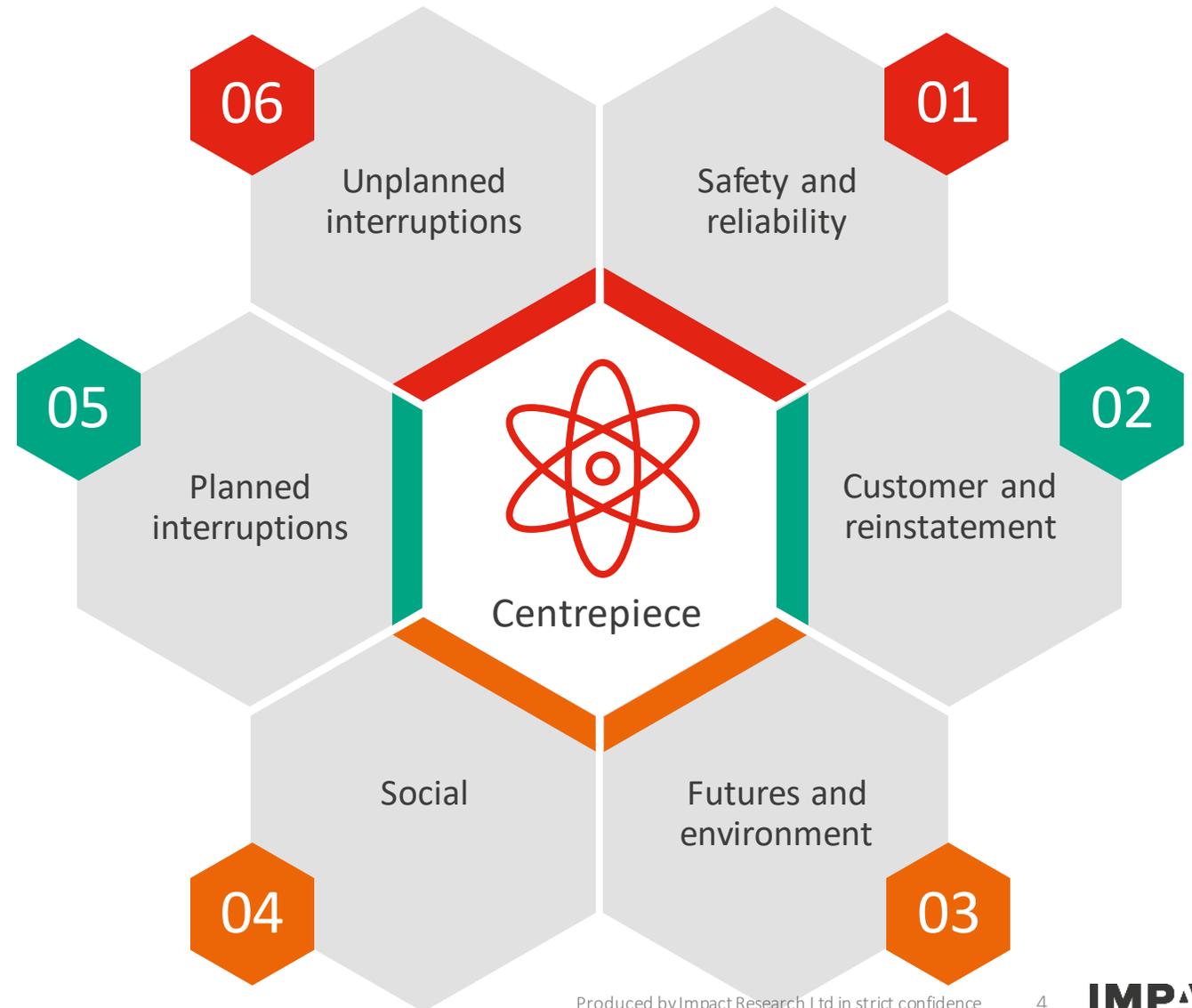
Stakeholder engagement guiding principles

Best practice stakeholder engagement techniques must be used to ensure that stakeholders' perceptions and needs are accurately captured and reflected in strategic business planning. This means engagement that is targeted at stakeholder interest, knowledge and purpose, from consultation to collaborative engagement.

The Pioneer surveys are a suite of surveys designed to gain meaningful quantitative data on NGN's key business topics to inform the Business Plan

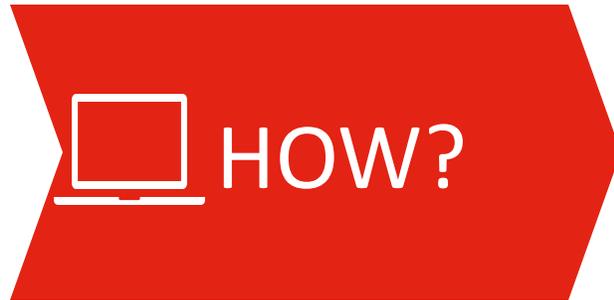
Stakeholders who responded to the Centrepiece survey were then segmented by interest groups and engaged in more detail on their areas of expertise in topic-specific Pioneer Surveys.

Numbers were further boosted by inviting stakeholders to take part in relevant Pioneer surveys via other channels including social media and letter drops to customers.



METHODOLOGY

A statistically robust methodology was used to establish the opinions of NGN's customers and stakeholders.



Online self-completion surveys advertised through:

- NGN website
- Social media
- Online panel

In addition, targeted telephone and face-to-face interviews were completed, using the same questionnaire.

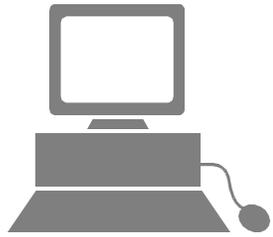


1,018 respondents in total. **786** customers and **232** stakeholders, completed this Pioneer survey.



Fieldwork took place between April and July 2019. Surveys took approximately 5-10 mins to complete.

WHO WE SURVEYED



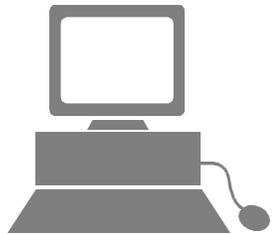
98.4%
online
(panel)



0.1%
telephone



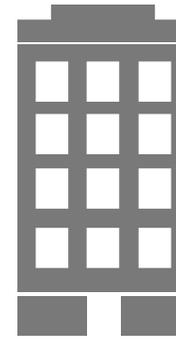
0.5%
face-to-
face



1%
online
(website)



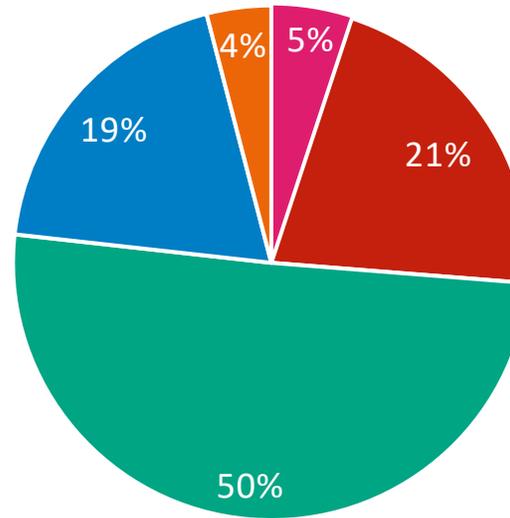
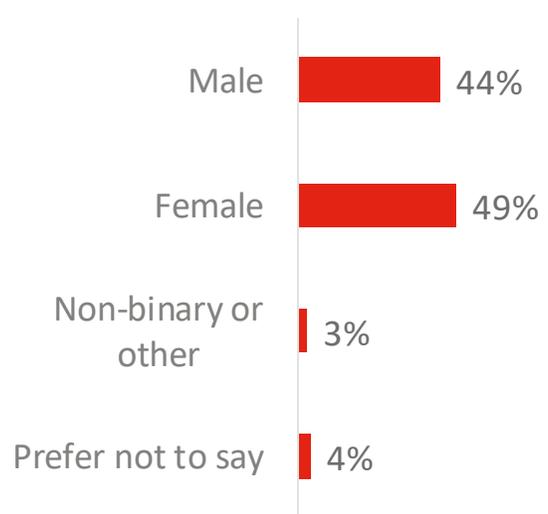
77%



23% stakeholder*

*includes:

- 10% local policy maker
- 9% NGN workforce and supply chain
- 2% National Policy Maker



■ 16-18 ■ 19-25 ■ 26-45
■ 46-65 ■ Over 65

54% ABC1
46% C2DE

The social grades (ABC1, C2DE) on this slide are a system of demographic classification used in the United Kingdom and are a standard for market research.

Chief income earner's occupation:
 A = Higher managerial, administrative or professional
 B = Intermediate managerial, administrative or professional
 C1 = Supervisory or clerical and junior managerial, administrative or professional
 C2 = Skilled manual workers
 D = Semi-skilled and unskilled manual workers
 E = State pensioners, casual and lowest grade workers, unemployed with state benefits only

20% Rural
80% Urban

SUPPORTING NGN'S VULNERABLE CUSTOMERS

IMPACT

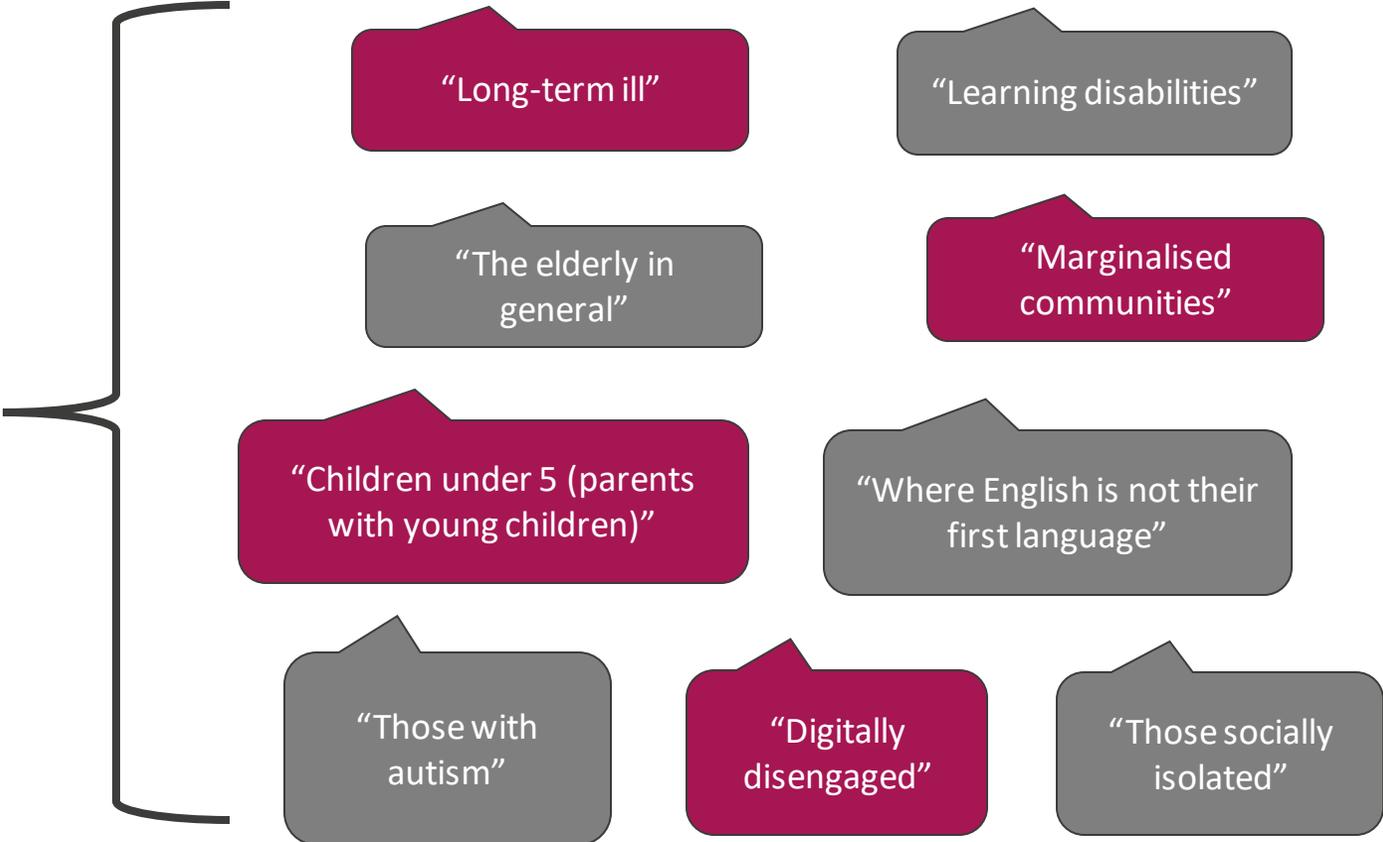
FROM INSIGHT TO INFLUENCE

Most customers and stakeholders believe NGN’s categorisation of vulnerable customers is all encompassing, while 5% have suggested additional vulnerabilities for NGN to consider/ do not feel the current categorisations capture them

NGN’s categories

- Financial hardship
- Mental wellbeing
- Physical challenges
- Rural vulnerability
- Temporary vulnerability

Other vulnerabilities



Customers and stakeholders largely support NGN supporting vulnerable customers, although stakeholders are less supportive for certain categories

Financial hardship

84% customers

87% stakeholders

Mental wellbeing

82% customers

77% stakeholders

Physical challenges

83% customers

65% stakeholders

Rural vulnerability

87% customers

71% stakeholders

Temporary vulnerability

90% customers

84% stakeholders

Q2 Thinking about the categories of vulnerability which we currently support, are there any, in your opinion, which should not be a focus for us? Percentage that support NGN focusing support on this vulnerability

Base: Customers (786), Stakeholders (230)

When reviewing NGN's current initiatives to support vulnerable customers, a small number of additional suggestions have been proposed by customers and stakeholders

"Homeless projects, getting young people off the streets especially in the winter months when it's cold and wet, I am seeing more people on the streets which is so hard to see, I try and buy the one's I see food and drink but big companies may be able to do more which would be great." Customer

"Sight impairment is the forgotten disability, but it's a disability which puts its sufferers in more danger from daily living than any other. I worked with this section of the community for over 25 years and now find myself diagnosed with the prospect of losing my sight. I know that this disability group is served by many locally based charities and perhaps you can begin to work with them to identify how you can meet the needs of this group. Ask your office colleagues to spend half an hour of their working day blindfolded to help you to understand what it is like to lose your sight." Customer

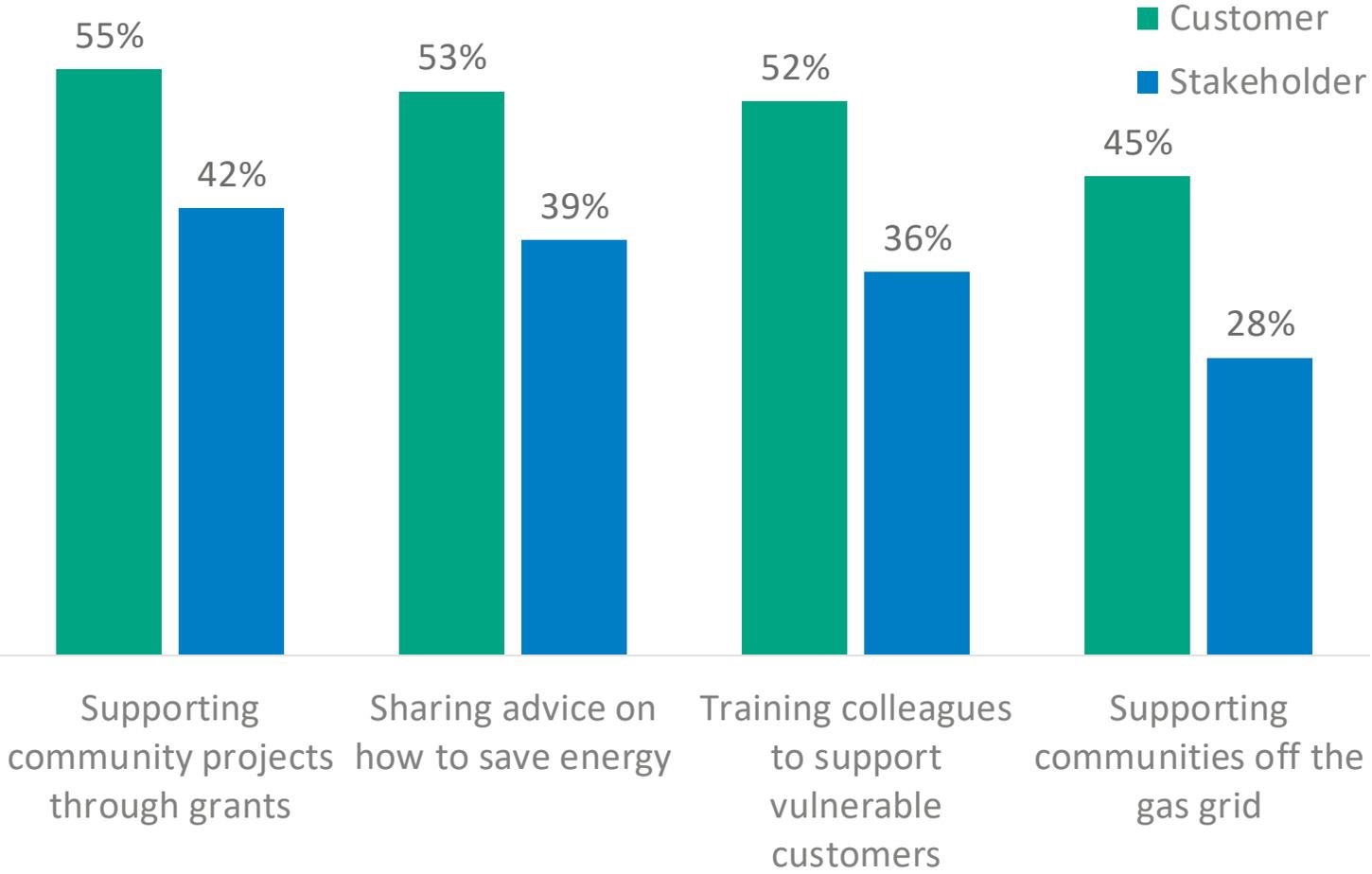
"Personal vulnerability care officer who takes day to day case with the vulnerability"
Customer

"First time gas central heating funding, energy efficiency advice and support, financial relief, engaging particular vulnerabilities e.g. Deaf" Stakeholder

"Ensuring all communities are connected to gas, my village still in 2019 does not have a mains gas supply even though my property is only 15 years old" Customer

"Disability awareness training to help vulnerable people with learning disabilities" Customer

Customers are more supportive of vulnerable customer initiatives than stakeholders.
 Non gas households are seen as least deserving of support



Amongst stakeholders, Local policy makers are more supportive of all initiatives than NGN workforce / supply chain

Q4 Thinking about the following areas, how much do you agree that we should continue to provide that kind of support to the community and customers in vulnerable situations? Please use a scale of 1-10, where 1 is do not agree at all, and 10 is completely agree. Showing top 3 box scores only, DK removed – 3%-8% for each statement.

Base: Customers (786), Stakeholders (230)

Stakeholders are less engaged in Vulnerable customer outcomes than customers.

Ensuring customers feel safe in their homes



58% customers

39% stakeholders

Providing an excellent customer experience



57% customers

39% stakeholders

Importance of vulnerable customer outcomes

Supporting the communities we serve



56% customers

42% stakeholders

Helping our customers to save money



51% customers

29% stakeholders

No notable differences by sub group

Q6 How important is it that each of the following outcomes for customers are delivered in the vulnerability strategy that we are developing? Please use a scale of 1 to 10 where 1 is not important and 10 is very important.

Showing top 3 box scores only
Base: Customers (786), Stakeholders (230)

EMPLOYEES' VOLUNTEERING SCHEME

IMPACT

FROM INSIGHT TO INFLUENCE

Three quarters of customers and nearly half of stakeholders agree with the employee volunteer scheme. They feel it helps the company integrate with the communities and improves staff morale.

In favour of employee volunteering scheme

74% of customers & 47% of stakeholders

“Volunteering helps the community and makes employees happier and more productive” Customer

“It is a fantastic opportunity for staff and a wonderful thing for you to do” Customer

“It is important that they are allowed to volunteer without financial penalty.” Customer

“This opportunity should be offered by all large employers. It contributes to the wellbeing of staff and benefits the community..” Stakeholder

“It will help keep employees connected to the community they work within and aware of the issues which affect people.” Stakeholder

“This is something that will bring closeness to communities and the volunteers” Customer

“I think this a great idea not many companies would entertain this and it shows you're a caring company” Customer

“Good opportunity for your staff to learn something & give back to the community.” Customer

Don't know 27%

Q7 Do you agree with this scheme where NGN employees are able to request paid time off to volunteer? Base: Customers (786), Stakeholders (230).

Q8 Why do you say that? Base: All that said “yes” at Q7. Customers (423), Stakeholders (80).

Most of those that disagree with the employee volunteer scheme did not have a reasoned answer for why they didn't support it. Others simply think it is not the employers' role to give paid time away from their core jobs.

Not in favour of employee volunteering scheme

26% of customers & 53% of stakeholders

"Its not voluntary if they're getting paid" Customer

"I am paying them to work nothing else" Customer

"Need specialist individuals." Customer

"They should do it in their own time." Customer

"Some of your workers will be unfit, unable or just unwilling to volunteer. Not all volunteer work is of equal worth. Instead, give your employees more free time and those who want to volunteer will." Customer

"Time off should be unpaid" Customer

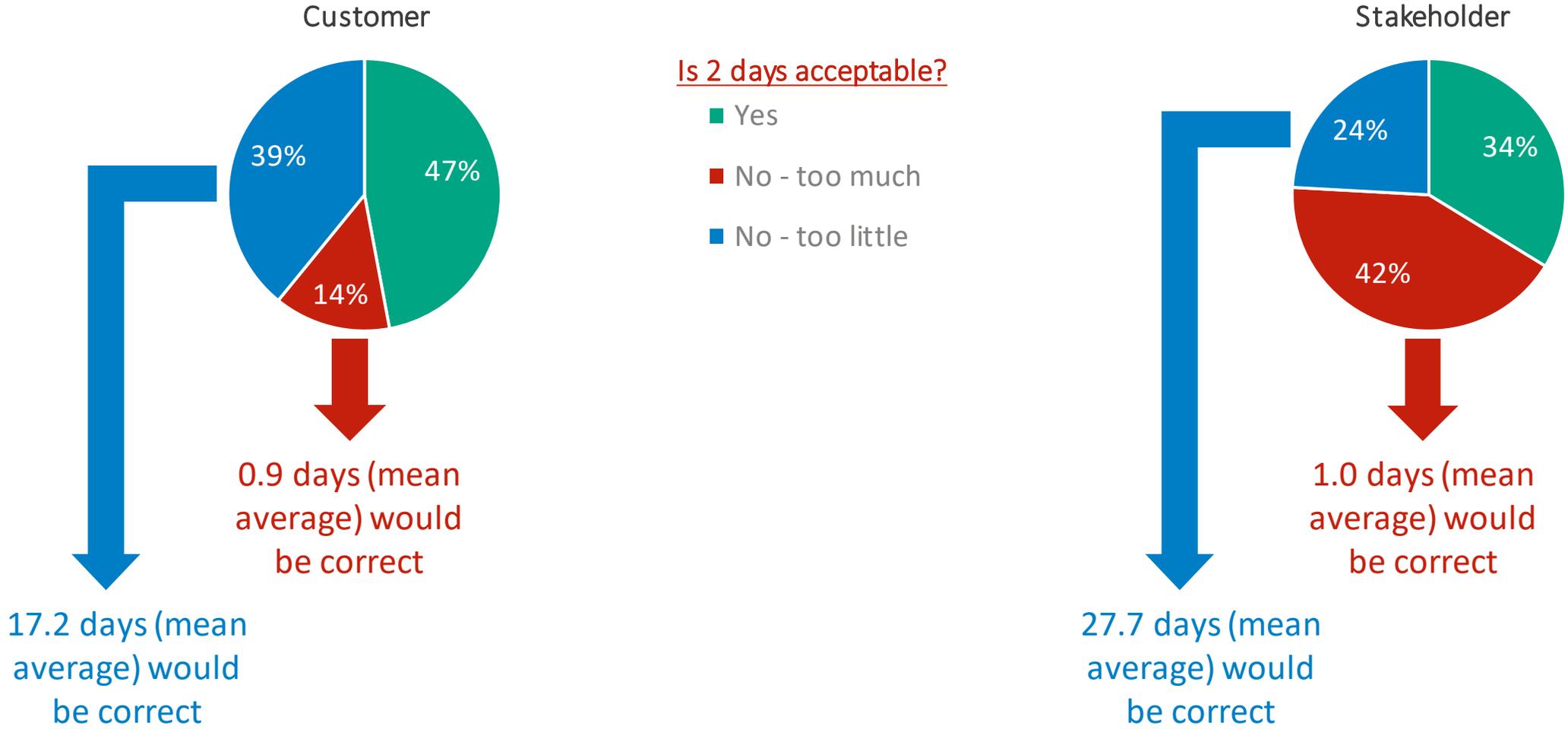
"I believe volunteering should be done in your own time & not at the expense of your employer." Customer

Don't know 27%

Q7 Do you agree with this scheme where NGN employees are able to request paid time off to volunteer? Base: Customers (786), Stakeholders (230).

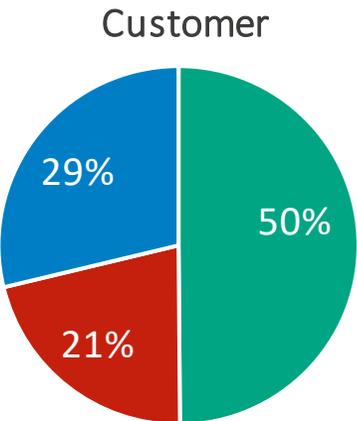
Q8 Why do you say that? Base: All that said "no" at Q7. Customers (151), Stakeholders (92).

Nearly half of customers and a third of stakeholders think 2 days of paid volunteering is about right. Customers are more likely to think 2 days is too little, while stakeholders are more likely to think it is too much.



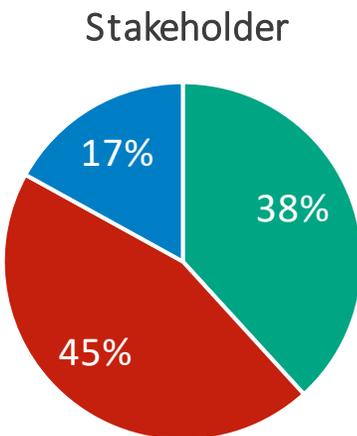
Q8 Currently colleagues can request up to two working days off a year. Is this an acceptable amount of days? Base: Customers (786), Stakeholders (230).
 Q9 What would be the correct number of days? Base: All that said "no – too much" at Q8. Customers (108), Stakeholders (96). All that said "no – too little" at Q8. Customers (306), Stakeholders (55).

Customers are more likely to prefer that employees can support any charity, whereas stakeholders would prefer only a selection of charities that align with NGN's objectives



Which charities?

- Support any charity
- Only support initiatives that align with our social objectives
- Don't know



Females are more likely to prefer supporting any charity (56%)

Allowing personal choice of charity may increase engagement, though charities would need to be vetted, and some think volunteering during working hours should be linked to the employer's aims.

Support any charity

"Gives them a chance to support something close to them" Customer

"You should have a personal choice who you volunteer for to make sure that you are passionate about the time you spend volunteering for them" Customer

"People should be able to support an organisation that means something to them, helping them to forge links and develop a relationship with the organisation they are volunteering for. Forcing someone to support a specific initiative may prevent people from engaging." Stakeholder

"It would widen your colleagues view of society & who might benefit from your schemes." Customer

"Volunteers need to be properly committed and to do this they need to believe in the cause." Stakeholder

Only support initiatives that align with our social objectives

"As an energy provider, environment should be a key focus for volunteers" Customer

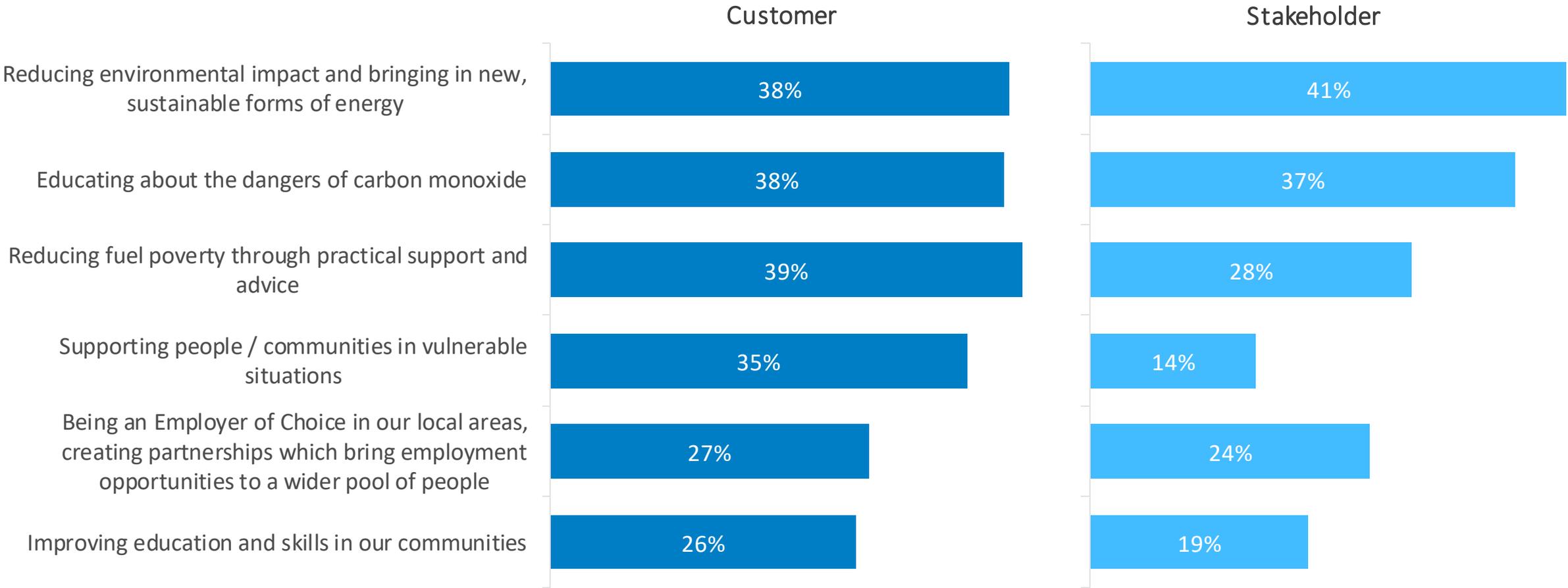
"Because they would learn more from interacting with relevant areas" Customer

"Some causes could well be objectionable." Customer

"From the business point of view it seems fair. Personal interests can be pursued in personal time." Customer

"You're giving them the time so should only be fair they support areas that you are supporting. But if you gave them a week a year you could split the time to cover both and tbh most charities probably fit into your areas." Customer

The environment, carbon monoxide, and reducing fuel poverty are seen as the most appropriate areas for employee volunteering



Older customers are more supportive of all areas than younger customers

Females are more supportive of environmental impact (44%) and vulnerable communities (42%) than males

ENERGY
EFFICIENCY
ADVICE

IMPACT

FROM INSIGHT TO INFLUENCE

More stakeholders than customers have received energy efficiency advice. Less than half of customers that received advice remember receiving it from NGN.

Customer

28% have received energy efficiency advice



40% from NGN



26% from other:



Over 65s (40%), vulnerable (38%) and fuel poor (37%) are more likely to have received advice

Stakeholder

35% have received energy efficiency advice



70% from NGN



15% from other:



Females (43%) and local policy makers (44%) are more likely to have received advice

Q11 Have you ever received any energy efficiency advice? Base: Customers (786), Stakeholders (230).

Q12 Who did you receive this advice from? Base: All that have received advice. Customers (223), Stakeholders (81).

Most did act on the energy advice they received, mostly by making behaviour changes such as not leaving appliances on standby and turning down thermostats

% Acted on energy advice they received

83% customers

80% stakeholders



Turning off at the plug / turning off lights

Adjusted / changed thermostat

Loft / wall insulation

Smart meter

Changed energy supplier

Energy efficient lighting

Quick fixes e.g. new water tank jacket, slow cooker

Solar panels

New boiler

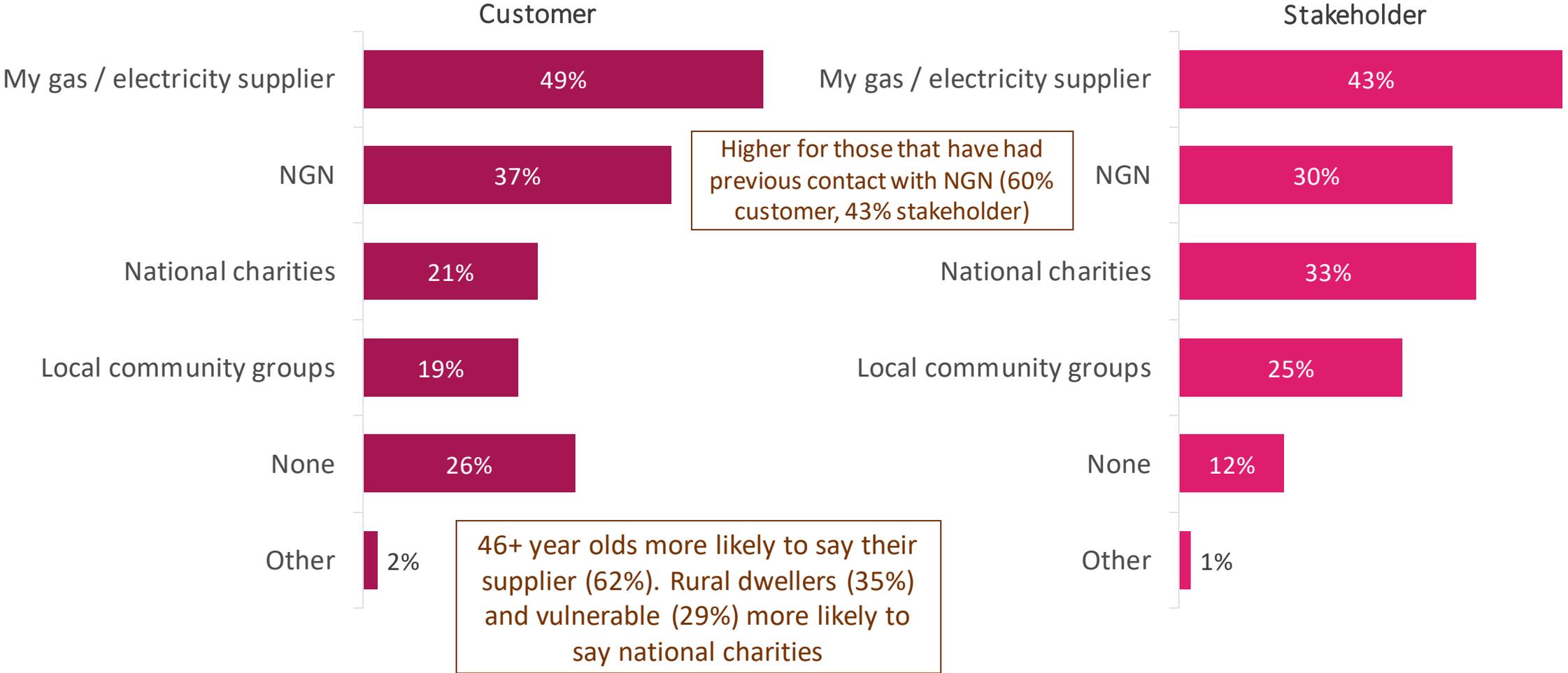
Draught proofing / curtain linings

6% Don't know

Q13 Have you acted upon the energy advice/guidance received? Base: All that have received advice. Customers (223), Stakeholders (81).

Q13 What changes have you made due to this advice? Base: All that have received advice and acted on it. Customers (173), Stakeholders (63).

Gas / electricity suppliers are seen as most appropriate for giving advice. Around a third see NGN as a provider of advice, particularly those more familiar with NGN



Q14 Which organisations do you feel are best placed to provide energy advice and guidance?
 Base: Customers (786), Stakeholders (230).

In-home personalised energy advice is the most popular role for NGN. Customers don't mind if this is in-house or outsourced and stakeholders prefer outsourced advice service

Fund energy efficiency partners to give personalised advice



28% customers

40% stakeholders

53% for business customers

Train staff to give in-home personalised advice



30% customers

18% stakeholders

What is NGN's role in educating customers?

Give general advice on the website



23% customers

29% stakeholders

45% for over 65s

Do nothing

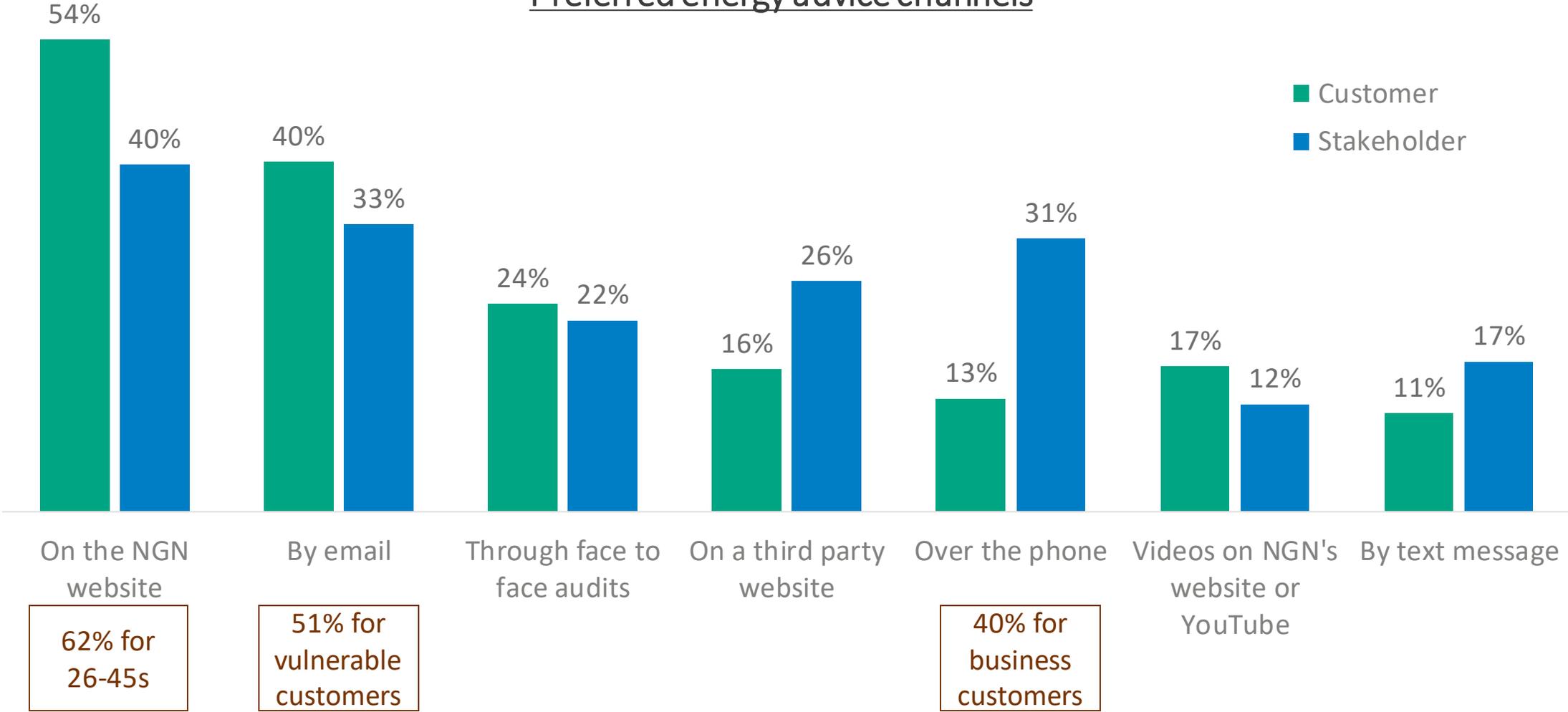


18% customers

12% stakeholders

NGN website and emails are the most popular advice channels. Stakeholders and business customers also appreciate phone contact.

Preferred energy advice channels



Q16 How would you like to receive or access energy efficiency information from us?
 Base: All that wanted advice from NGN at Q14. Customers (293), Stakeholders (63)

1 in 10 were able to recommend a partner for NGN's energy efficiency outreach programme

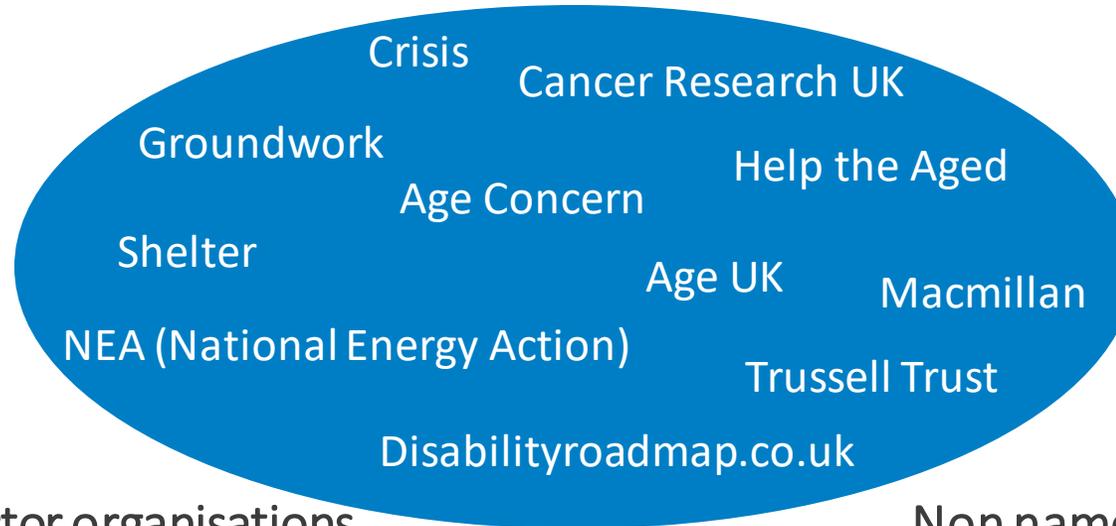
% recommended community partners

18% customers

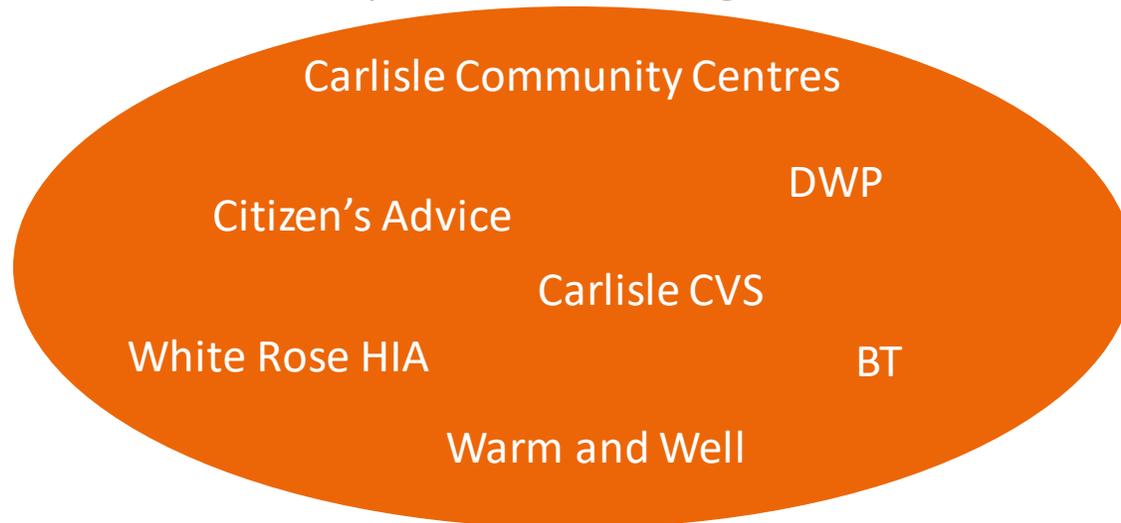
16% stakeholders

6% Don't know

Charities



Public/ private sector organisations



Non named organisations



Q17 Are there any community partners you think we should be working with to help customers with their energy efficiency?

Base: All that wanted advice from NGN or local community groups at Q14. Customers (365), Stakeholders (106)

Base: All that recommended community partners. Customers (37), Stakeholders (13)

CONCLUSIONS

IMPACT

FROM INSIGHT TO INFLUENCE

SUMMARY

Supporting NGN's vulnerable customers

Customers and stakeholders are supportive of NGN's efforts to help vulnerable groups (especially customers).

Community grants and energy efficiency advice are particularly valued initiatives.

British Gas and Citizens Advice are seen as leaders in this area.

Employees' volunteering scheme

Half of customers and a third of stakeholders agree with the scheme.

It is felt to strengthen ties with the local communities and benefit employees but some are cynical about offering paid "time off work".

The environment, carbon monoxide, and reducing fuel poverty are seen as the most appropriate areas.

Energy efficiency advice

Around a third have received advice, mostly from NGN.

Most acted on the advice, especially making small energy saving behaviour changes.

NGN is seen as an appropriate advisor, but this is driven by level of familiarity with NGN.

THANK YOU

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IMPACT
FROM INSIGHT TO INFLUENCE