Northern Gas Network

Customer Perceptions Research

Wave 4 – 2024
Fieldwork: January 2024 – Report February 2024

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Feb 2024

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Background & objectives

Background

Northern Gas Networks (NGN), operating within a regulated environment, is currently in the third year of its five-year business plan (2021-2026). To assess the impact of external events and market changes on stakeholder perceptions, NGN has partnered with Accent to conduct ongoing research.

Building on an initial baseline study conducted by Accent in December 2020-January 2021, subsequent waves of research were carried out in December 2021-January 2022 (Wave 2) and December 2022-January 2023 (Wave 3). These studies tracked evolving customer attitudes and preferences.

The next wave of research, scheduled for December 2023-January 2024 (Wave 4), will not only monitor ongoing changes but also provide crucial insights for shaping NGN's business plan submissions for the upcoming Riio-3 period (2026-2031).

Objectives

Main objectives/ what we covered:

- Awareness of NGN
- Customer priorities
- Sustainability commitments
- Energy use/ future of energy Hydrogen
- Vulnerability support & recruitment
- Dealing with complaints
- Safety maintenance

Contents

Research methodology

1,403 CUSTOMERS

- 1,167 **domestic** customers
- 236 **business** customers

A DUAL APPROACH was used to provide the sample of NGN customers:

- Online panel using Dynata (n=1,303)
- Face-to-face interviewing at customer's doorstep (n=100) to capture the views of those underrepresented on panels (i.e. minority groups, older) - £5 cash incentive was offered for those completed the survey
- Domestic weighting can be found in the demographic breakdown in the appendix.
- Fieldwork wave & label: Jan 21: wave 1, Jan 22: wave 2, Jan 23: Wave 3, Jan 24: wave 4.

NGN DEMOGRAPHIC CLASSIFICATION

This year we added several new demographic classification questions that align with NGN's customers' classification. This changes the previous age band and weighting had to be adjust accordingly.

DIGITALLY DISENGAGED

7% of the domestic customers were digitally disengaged (DD). DD participants were either without access to the internet, had low confidence in using the internet or had not used the internet in the previous 6 months

DOMESTIC CUSTOMER: aged 16+ living in the NGN network with a mains gas supply to their property. Responsible (jointly or solely) for the household's energy bill

The domestic data is weighted by age and social grade profile of the Household Reference Person in the North East and Yorkshire and Humberside regions

BUSINESS CUSTOMER: works for an organisation in the NGN network and is responsible for managing the organisation's energy bills

All charts show percentages. Percentages may not total 100 due to rounding. Significant at 95% confidence level.
Total data shown is unweighted, domestic data is weighted, business data is unweighted

2023 – The cost-of-living crisis continues

REUTERS

King Charles to quietly mark death of late mother, Queen Elizabeth

By Michael Holden

Analysis

UK households face battle to regain former living standards even if inflation eases

Phillip Inman

Workers on average incomes are missing out on wage rises as energy bills increase

- UK inflation remains unchanged at 4% as food prices fall
- Which goods and services have changed most in price?

Revealed: record number of households in UK depending on food banks

Almost 90% of food banks see increased demand, as organisers fear having to cut support or turn people away

NHS in acute condition: the crisis facing the UK's hospitals

News > UK > Home News

Nationwide hikes mortgage rates as swaps rise

The building society said that its mortgage rates would rise by up to 0.25 percentage points from Tuesday, although some will rise by much less

PA Reporters • 12 hours ago • Comments

Ireland and Spain among EU nations striking a different note on Gaza war

Ashifa Kassam

In taking alternative direction to likes of US and UK, group has played a role in shifting perspectives on the conflict

- Middle East crisis - live updates

Climate change + Add to myFT

Europe's Climate Leaders 2023: interactive listing

For the continent's carbon emitters, the heat is on — but some are doing better than others in reducing their footprint

GOV.UK | Help for Households

Energy saving tips | Energy bills | Household costs | Childcare costs | Income support | Travel costs

Home

Help with your energy bills

Accent

Key takeaways

Awarenes

- Overall awareness of NGN increased slightly, but most domestic customers still know little about them.
- Business customers have consistently higher awareness than domestic.

Priorities

- Keeping bills low remains the top priority for all customers, especially older, low-income, and digitally disengaged.
- Concerns about paying energy bills have decreased overall but remain high for vulnerable customers.
- Access to affordable energy solutions is the top desired sustainability commitment.

Energy Usage

- Three in five customers choose to use less energy, mostly driven by vulnerable groups.
- Awareness of future heating technologies varies, with heat pumps most well-known.
- Positive perception of hydrogen declined, with concerns about safety and cost increasing.
- Customers want a say in deciding future heating systems and sources.

Vulnerability &

- Medical dependence on energy is seen as the most important aspect of vulnerability.
- Non-financial benefits and well-being approach are key factors for attracting employees.

Customer

- Permanent resolution of complaints is preferred, even if it takes longer.
- Regular updates within 2-5 days are desired.
- Frequency of maintenance remained unaffected by the cost-of-living crisis.

IF YOU ONLY HAVE ONE MINUTE

- Affordability remains paramount for customers, especially vulnerable groups.
- Hydrogen perception needs improvement through addressing safety and cost concerns.
- Customer involvement in future energy decisions is desired.
- Focusing on well-being and non-financial benefits can attract employees.

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Recommendations

- **Prioritise affordability and clear communication:** Focus on keeping bills low and promoting energy saving methods, especially for vulnerable customers. Communicate transparently about costs and future energy options.
- **Communication about hydrogen cautiously:** Acknowledge declining positive perception and address safety/cost concerns through education and collaboration.
- **Empower customers in the energy transition:** Give them a voice in choosing future heating systems and inform them about options through trusted sources.
- **Emphasise well-being in employee recruitment:** Highlight non-financial benefits and commitment to well-being to attract and retain talent.
- **Improve complaint resolution:** While prompt updates are valued, prioritise permanent solutions, even if it takes longer.
- **Remember:** Building trust and transparency will be key for NGN to navigate the evolving energy landscape and meet customer expectations.

Key Summary – Total

Awareness of NGN

Jan 2021	Jan 2022	Jan 2023	Jan 2024
66%	62%	67%	70%

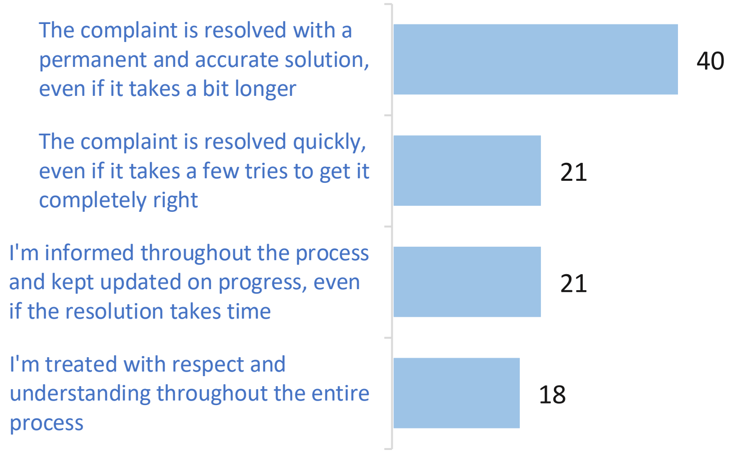
Difficulty paying bills

Domestic	Wave 1	Wave 2	Wave 3	Wave 4
Pay without any difficulty	**66%**	**53%**	**44%**	**49%**
Pay with difficulty	**33%**	**46%**	**55%**	**48%**

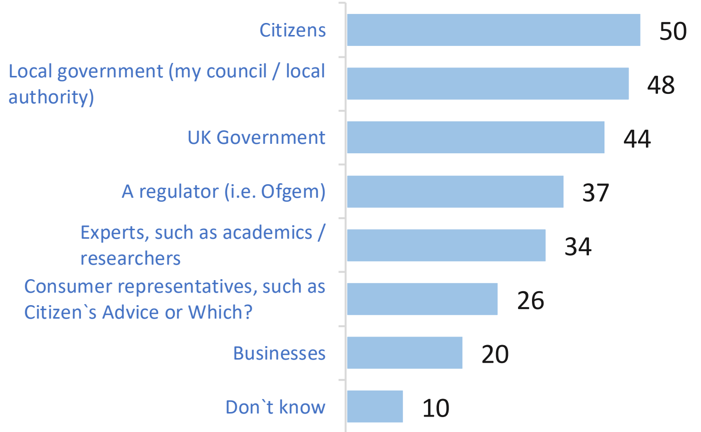
Concerns about energy spend

Domestic	Wave 1	Wave 2	Wave 3	Wave 4
I am concerned about the amount of money we spend on energy	**68%**	**85%**	**90%**	**88%**

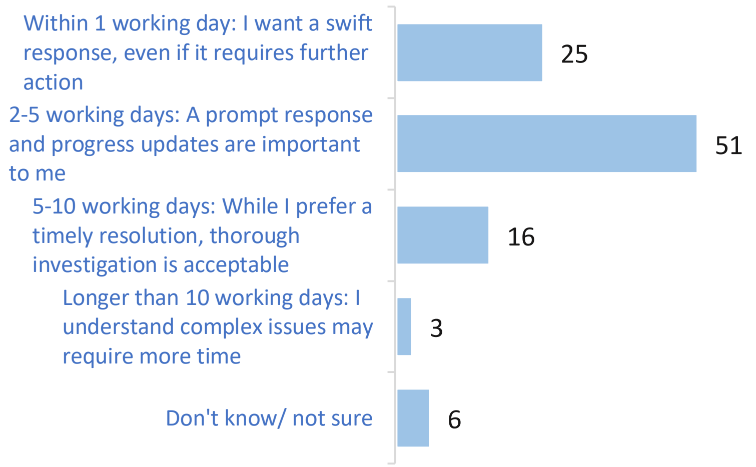
Complaint perception



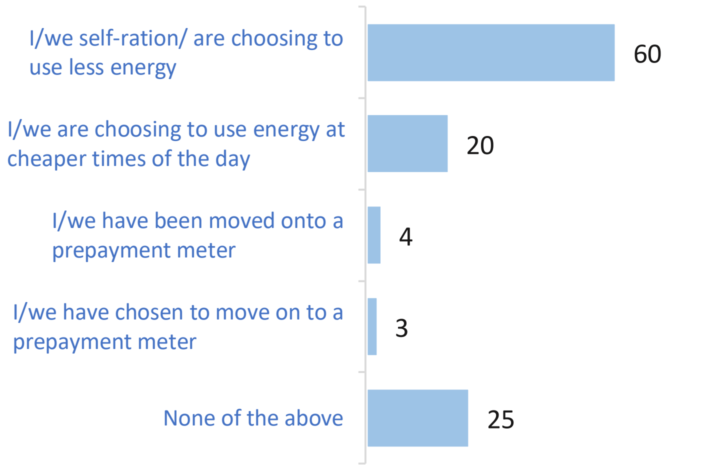
Who should be involved in deciding which areas continue to have a gas supply wave 4



Complaint Timeframe



Customers' situation



All charts show percentages. Percentages may not total 100 due to rounding. Significant at 95% confidence level

Awareness of NGN

Overall awareness increased slightly across all groups

Most of NGN's Domestic customers know 'nothing' or at best 'a little' about NGN

Business sample continues to have more awareness of NGN than domestic

Tracking question(s)

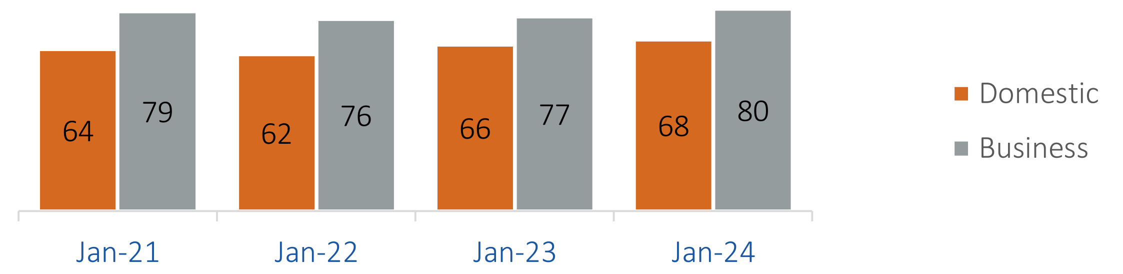
Awareness & knowledge of NGN

Awareness of NGN increased BY 3ppt to 70% (non-sig). Business sample continued to have a better awareness and knowledge of the company

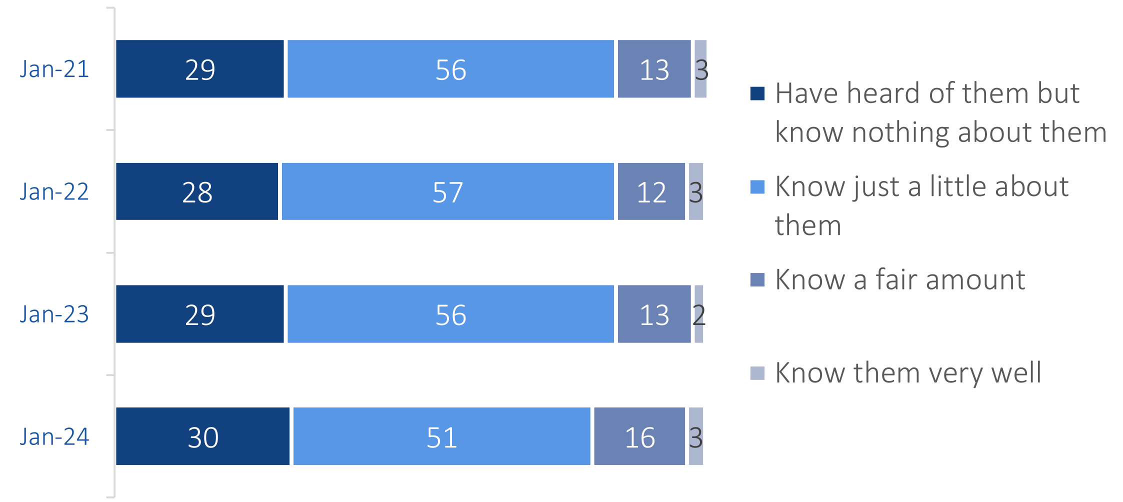
Awareness of NGN overall

66%	62%	67%	70%
Jan 2021	Jan 2022	Jan 2023	Jan 2024

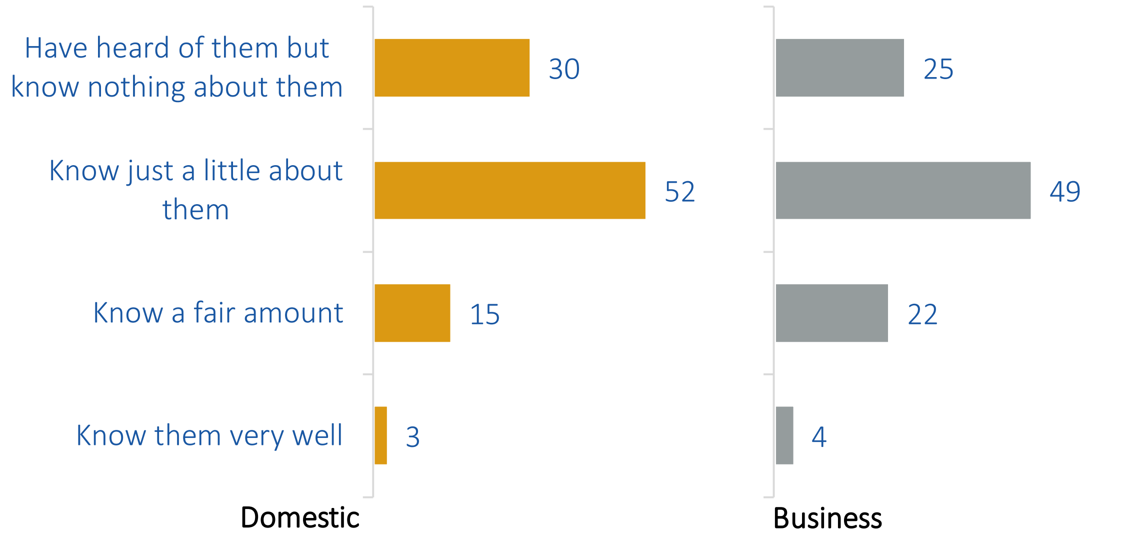
Awareness of NGN - Domestic vs Business



Knowledge of NGN overall



Knowledge of NGN - Domestic vs Business

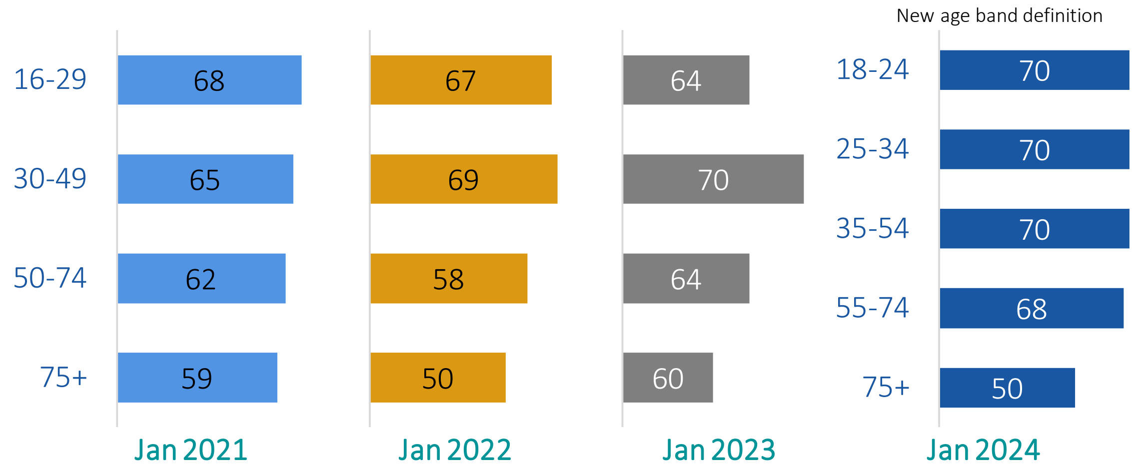


Q23. Had you previously heard of Northern Gas Networks? + Q24. How well do you feel you know NGN and the services it is responsible for? (Both questions are tracking questions) (wave 1 = 1,411; Domestic: 1,148; Business 263) (wave 2 = 1,124; Domestic 952, Business: 172) (wave 3= 1,355, Domestic 1,100, Business 255, wave 4: 1,403, Domestic: 1,167, Business: 236)

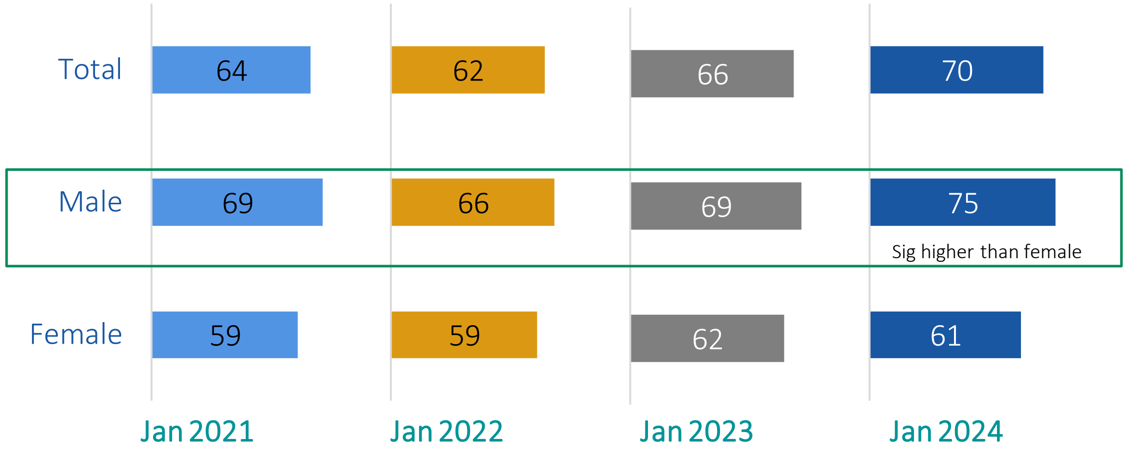
Awareness & knowledge of NGN (Domestic only)

Awareness of NGN in subgroups remained similar to the last wave, with little significant differences apart from gender.

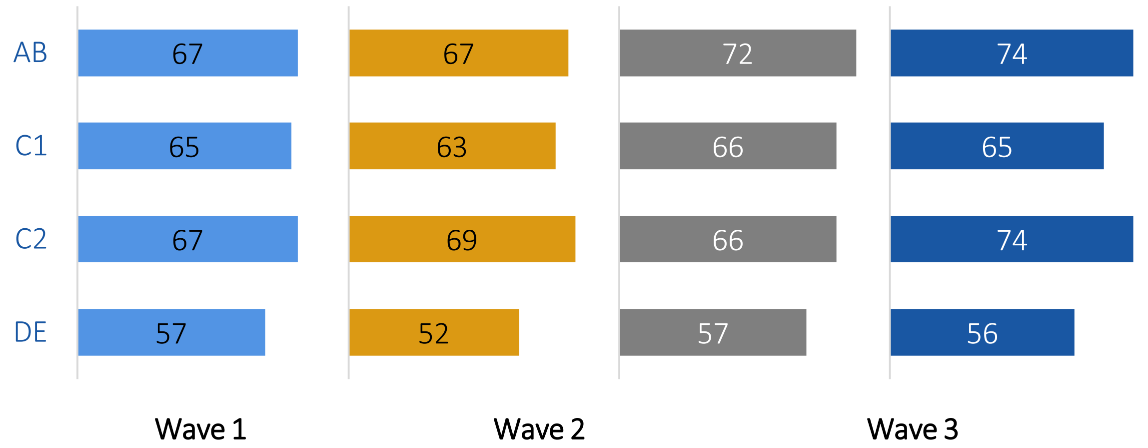
Awareness of NGN by age



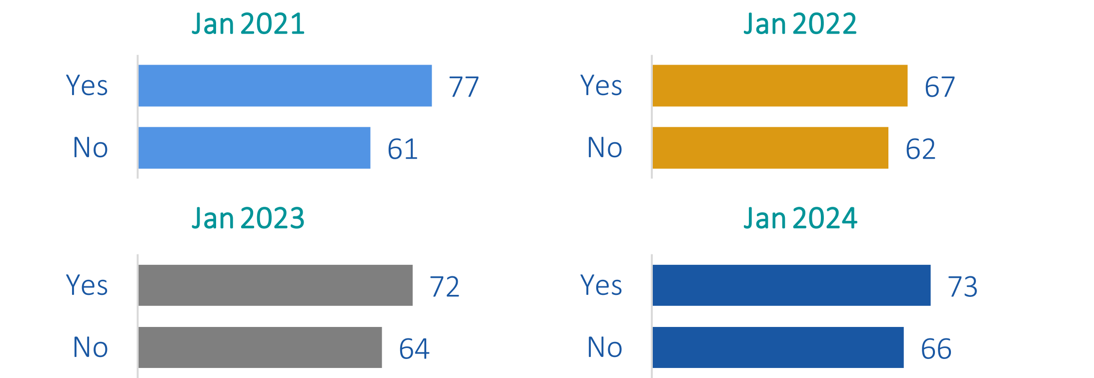
Awareness of NGN by gender



Awareness of NGN by SEG



Awareness of NGN by PSR status



Q23. Had you previously heard of Northern Gas Networks? DOMESTIC only (wave 1 Domestic: 1,148; wave 2 Domestic 952; wave 3: Domestic 1,100, wave 4: Domestic: 1,167)

Customer priorities

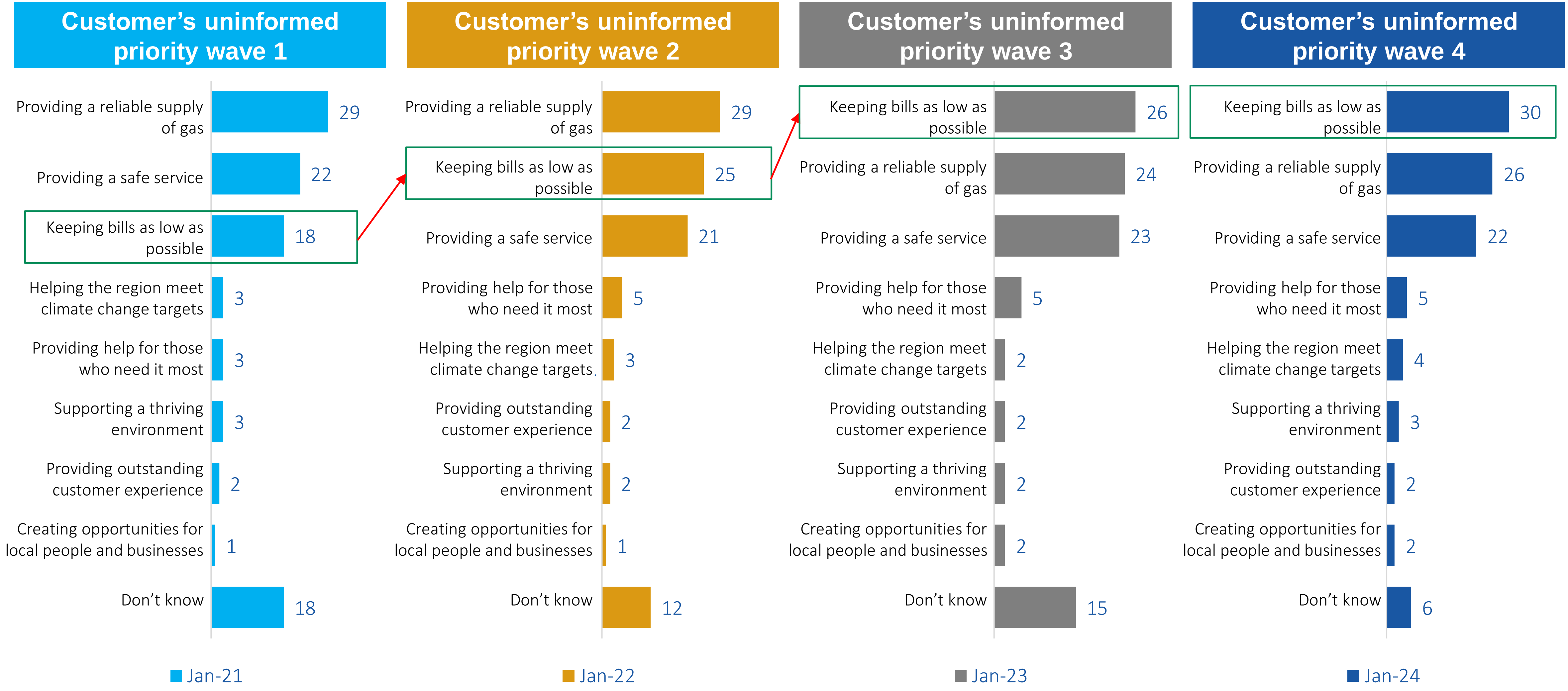
Lowest bill as possible continued to be front of mind when customers were asked about priorities for NGN to focus on

For social commitments, *"Faster, cheaper and more efficient gas connection"* is top commitment for both domestic and business participants.

Customers' uninformed priorities - Overall

Keeping bills as low as possible continued to be top priority for the second year running.

Tracking question(s)



Q26. Please rank the following from 1-8 (where 1 is the most important) to indicate which you feel are the most important for NGN to focus on (wave 1 = 1,411; Domestic: 1,148; Business 263) (wave 2 = 1,124; Domestic 952, Business: 172, wave 3= 1,355, Domestic 1,100, Business 255, wave 4: 1,403, Domestic: 1,167, Business: 236)

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Tracking question(s)

Customers' uninformed priorities by subgroup

Older customers, those in DE or those digitally disengaged are significantly more likely to pick ***keeping bills low*** as their top priority. Little significant differences by hydrogen awareness & perception.

Customers' uninformed priority wave 4 (Jan 24) - Domestic

	Age				
	18-24	25-34	35-54	55-74	75+
Keeping bills as low as possible	27	28	31	30	33
Providing a reliable supply of gas	14	13	26	32	37
Providing a safe service	13	25	18	29	13
Providing help for those who need it most	7	8	7	2	5
Helping the region meet climate change targets	7	3	6	2	2
Supporting a thriving environment	10	3	3	1	3
Providing outstanding customer experience	2	3	2	1	4
Creating opportunities for local people and businesses	4	5	1	1	
Don't know	17	13	6	1	2

	Hydrogen awareness		Pro-hydrogen	
	Yes	No	Yes	No
Keeping bills as low as possible	28	32	25	37
Providing a reliable supply of gas	26	24	26	24
Providing a safe service	27	20	25	18
Providing help for those who need it most	5	8	7	8
Helping the region meet climate change targets	3	4	4	5
Providing outstanding customer experience	3	3	4	
Supporting a thriving environment	1	3	2	4
Creating opportunities for local people and businesses	2	2	2	2
Don't know	5	4	6	2

	SEG			
	AB	C1	C2	DE
Keeping bills as low as possible	21	28	33	42
Providing a reliable supply of gas	31	26	25	18
Providing a safe service	25	26	21	19
Providing help for those who need it most	4	4	6	7
Helping the region meet climate change targets	4	3	6	2
Supporting a thriving environment	5	3	2	1
Providing outstanding customer experience	2	2	1	2
Creating opportunities for local people and businesses	2	3	1	1
Don't know	7	5	6	8

	Digital status		Bills	
	Digitally disengaged	Online	Pay without difficulty	Constant struggle / fall behind
Keeping bills as low as possible	50	29	25	35
Providing a reliable supply of gas	19	26	30	19
Providing a safe service	12	23	26	16
Providing help for those who need it most	10	5	4	8
Helping the region meet climate change targets	2	4	4	4
Providing outstanding customer experience		3	3	2
Supporting a thriving environment	4	2	2	3
Creating opportunities for local people and businesses		2	2	2
Don't know	4	6	4	11

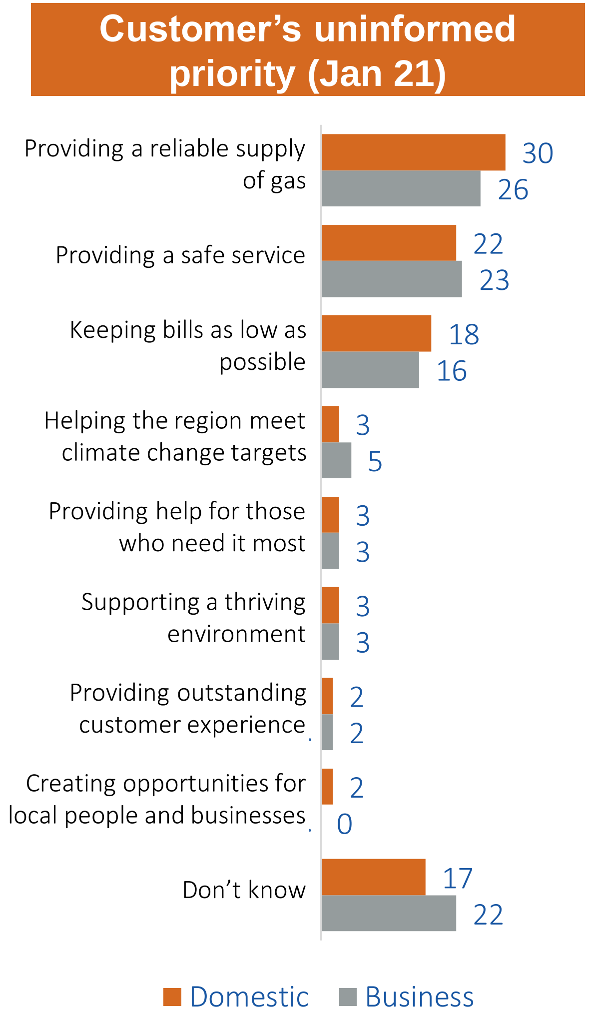
Sig higher/lower than at least one attribute in the same category at 95% confidence levels

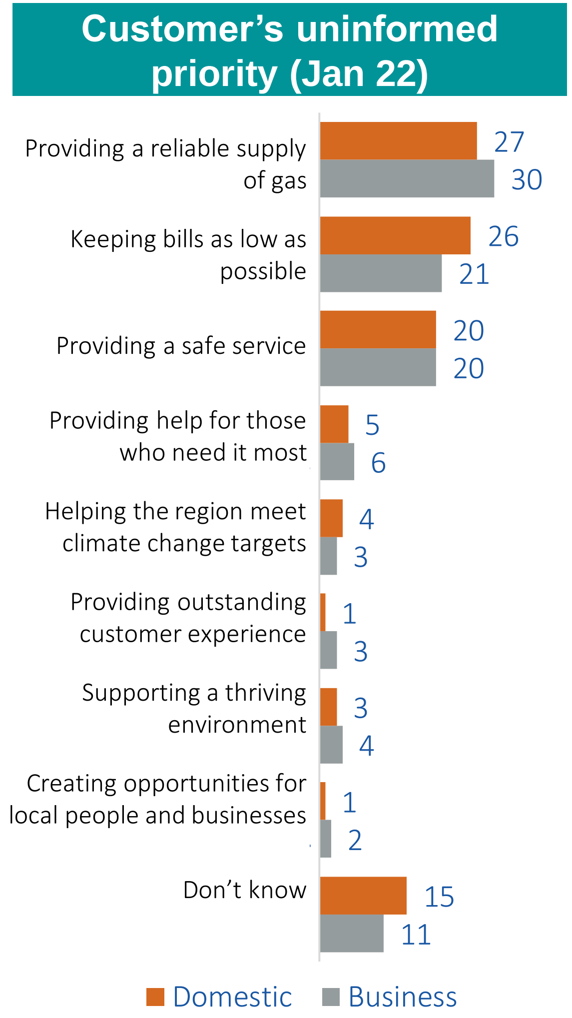
Q26. Please rank the following from 1-8 (where 1 is the most important) to indicate which you feel are the most important for NGN to focus on (wave 4: Domestic: 1,167)

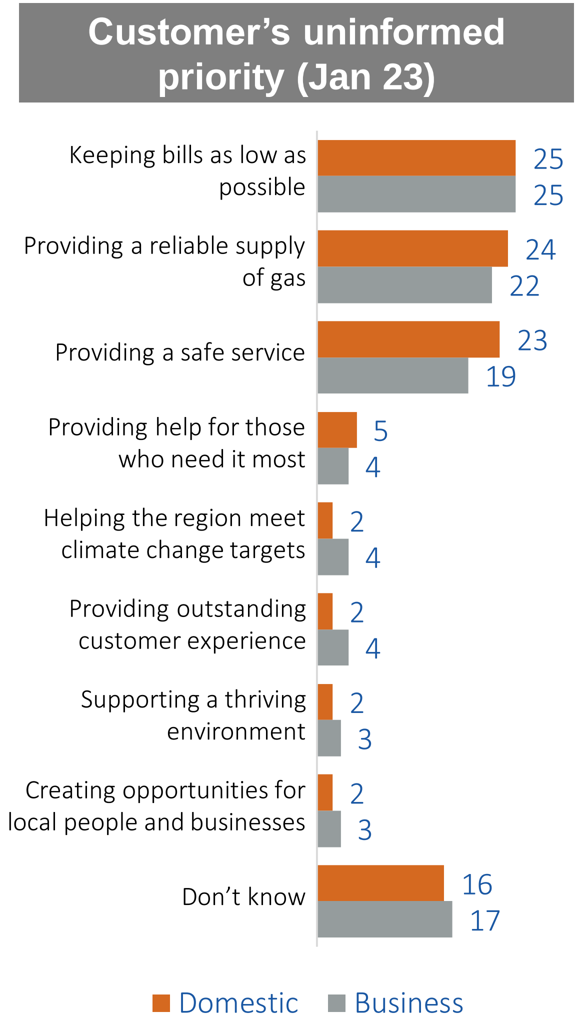
Customers' uninformed priority - by Business and Domestic

Keeping bills low was the top uninformed priority for both business and domestic customers in wave 4, 30% of each group voting this as most important for NGN to focus on.

Tracking question(s)







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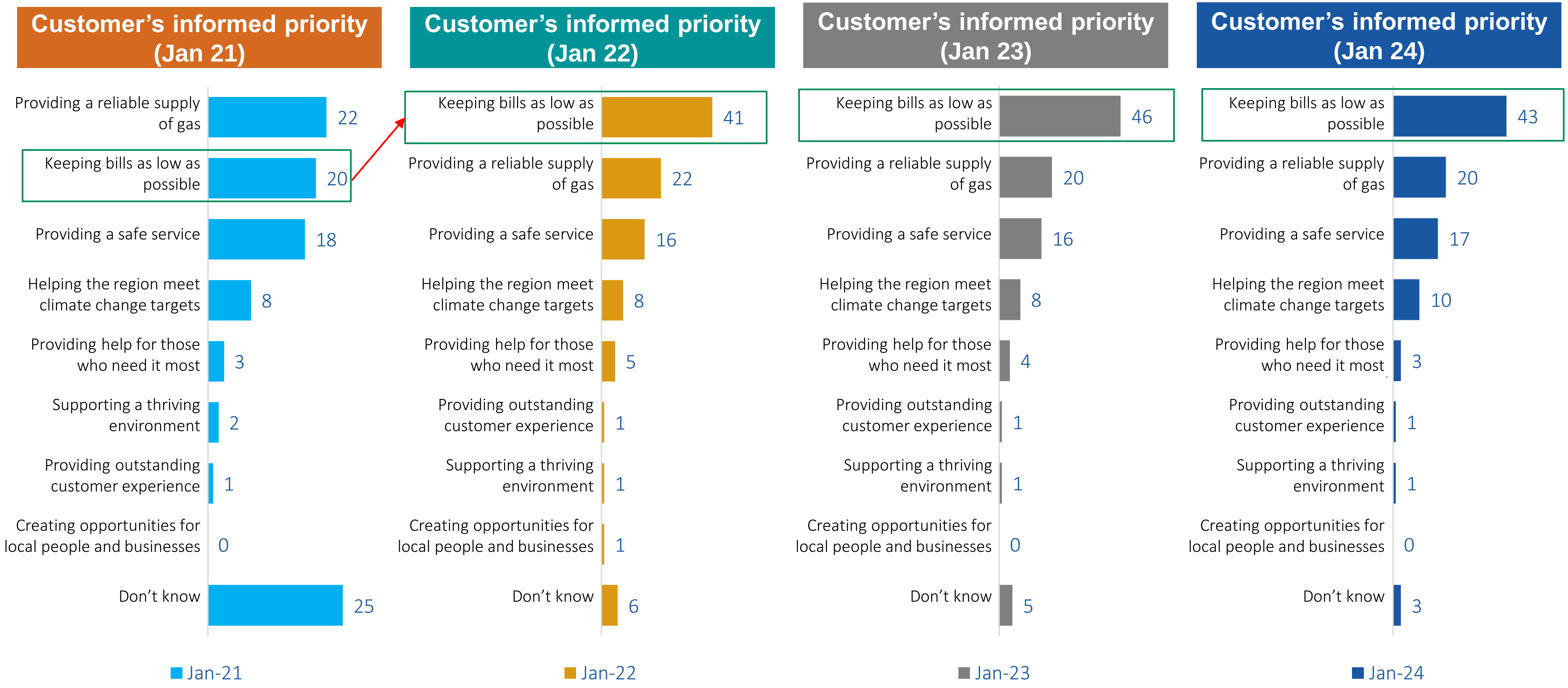
Customers' informed priority - Overall

For the last 3 years, informed priorities saw ***keeping bills as low as possible*** remained at the top of the priority list.

Tracking question(s)



Q48. We would like you to take another look at the business areas we showed you earlier, having learned more about NGN. Please rank them from 1-7 (where 1 is the most important) to indicate which you feel are the most important for NGN to focus on from 2021 to 2026. (wave 1 = 1,411; Domestic: 1,148; Business 263) (wave 2 = 1,124; Domestic 952, Business: 172, wave 3= 1,355, Domestic 1,100, Business 255, wave 4: 1,403, Domestic: 1,167, Business: 236)

Accent

Tracking question(s)

Customers' informed priorities by subgroup

While cost remained the top priority for most, younger customers placed more emphasis on environmental factors, while older customers prioritised a reliable gas supply. Customers who consistently paid their bills without difficulty were more likely to value reliability and safety over other factors.

Customers' informed priority wave 4 (Jan 24) - Domestic

	Age				
	18-24	25-34	35-54	55-74	75+
Keeping bills as low as possible	34	48	43	42	47
Providing a reliable supply of gas	9	15	17	28	24
Providing a safe service	12	15	17	21	14
Helping the region meet climate change targets	23	15	10	5	9
Providing help for those who need it most	9	3	6	2	1
Providing outstanding customer experience	1	2	1	0	3
Supporting a thriving environment	4	1	0	1	2
Creating opportunities for local people and businesses			0	0	
Don't know	9	2	4	2	1

	PSR		On benefit	
	On PSR	Not on PSR	Yes	No
Keeping bills as low as possible	44	43	44	43
Providing a reliable supply of gas	22	20	15	22
Providing a safe service	18	17	17	18
Helping the region meet climate change targets	10	10	12	10
Providing help for those who need it most	2	4	5	3
Providing outstanding customer experience	1	1	1	1
Supporting a thriving environment	1	1	1	1
Creating opportunities for local people and businesses		0		0
Don't know	2	3	4	2

	SEG			
	AB	C1	C2	DE
Keeping bills as low as possible	35	41	43	57
Providing a reliable supply of gas	26	21	23	11
Providing a safe service	21	17	12	17
Helping the region meet climate change targets	10	11	14	5
Providing help for those who need it most	4	3	4	4
Providing outstanding customer experience	2	1	1	1
Supporting a thriving environment	1	2	0	0
Creating opportunities for local people and businesses		0	0	
Don't know	1	4	2	6

	Digital status		Bills	
	Digitally disengaged	Online	Pay without difficulty	Constant struggle / fall behind
Keeping bills as low as possible	52	42	36	50
Providing a reliable supply of gas	17	21	26	11
Providing a safe service	17	17	20	12
Helping the region meet climate change targets	7	11	9	16
Providing help for those who need it most	3	3	3	6
Providing outstanding customer experience	2	1	1	4
Supporting a thriving environment	1	1	1	
Creating opportunities for local people and businesses		0	0	
Don't know		3	2	2

Sig higher/lower than at least one attribute in the same category at 95% confidence levels

Q48. We would like you to take another look at the business areas we showed you earlier, having learned more about NGN. Please rank them from 1-7 (where 1 is the most important) to indicate which you feel are the most important for NGN to focus on from 2021 to 2026.

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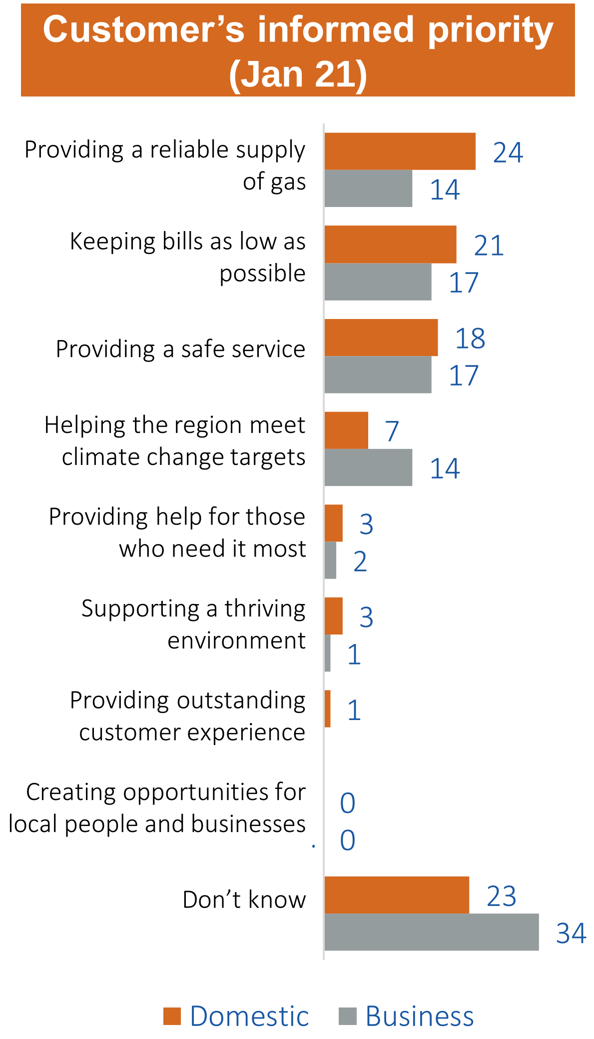
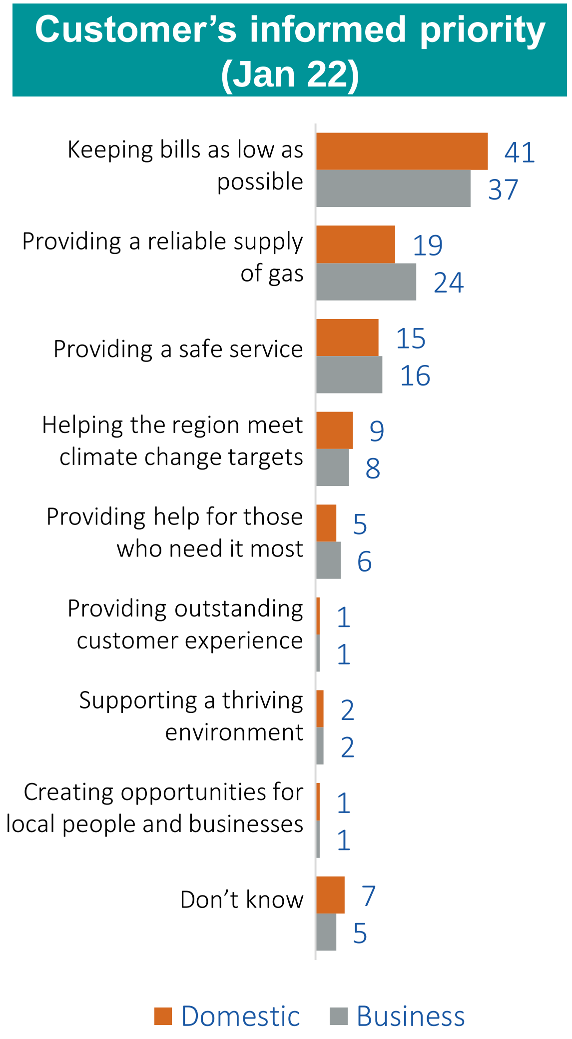
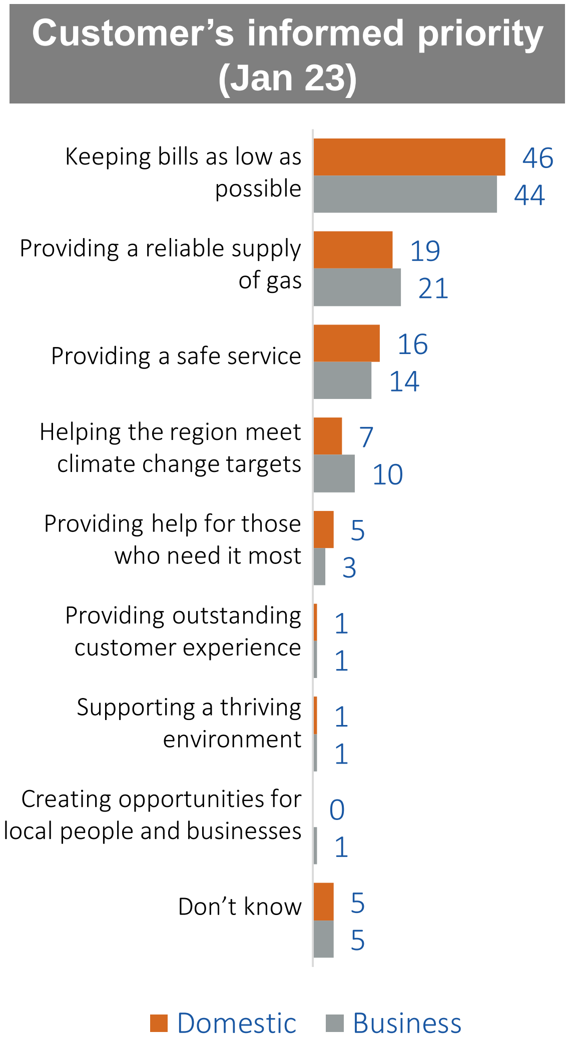
Customers' informed priority - by Business and Domestic

Keeping bills as low as possible remained the top informed priority for both the Domestic and Business sample, followed by ***Providing a reliable supply of gas***

Tracking question(s)







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Tracking question(s)

Comparing customers’ informed priority - Overall

Similar to previous waves, concerns about ***keeping bills as low as possible*** in January 2024 went up significantly once customers found out more about NGN.

Uninformed vs Informed priority (Jan 21)

Uninformed vs Informed priority (Jan 22)

Uninformed vs Informed priority (Jan 23)

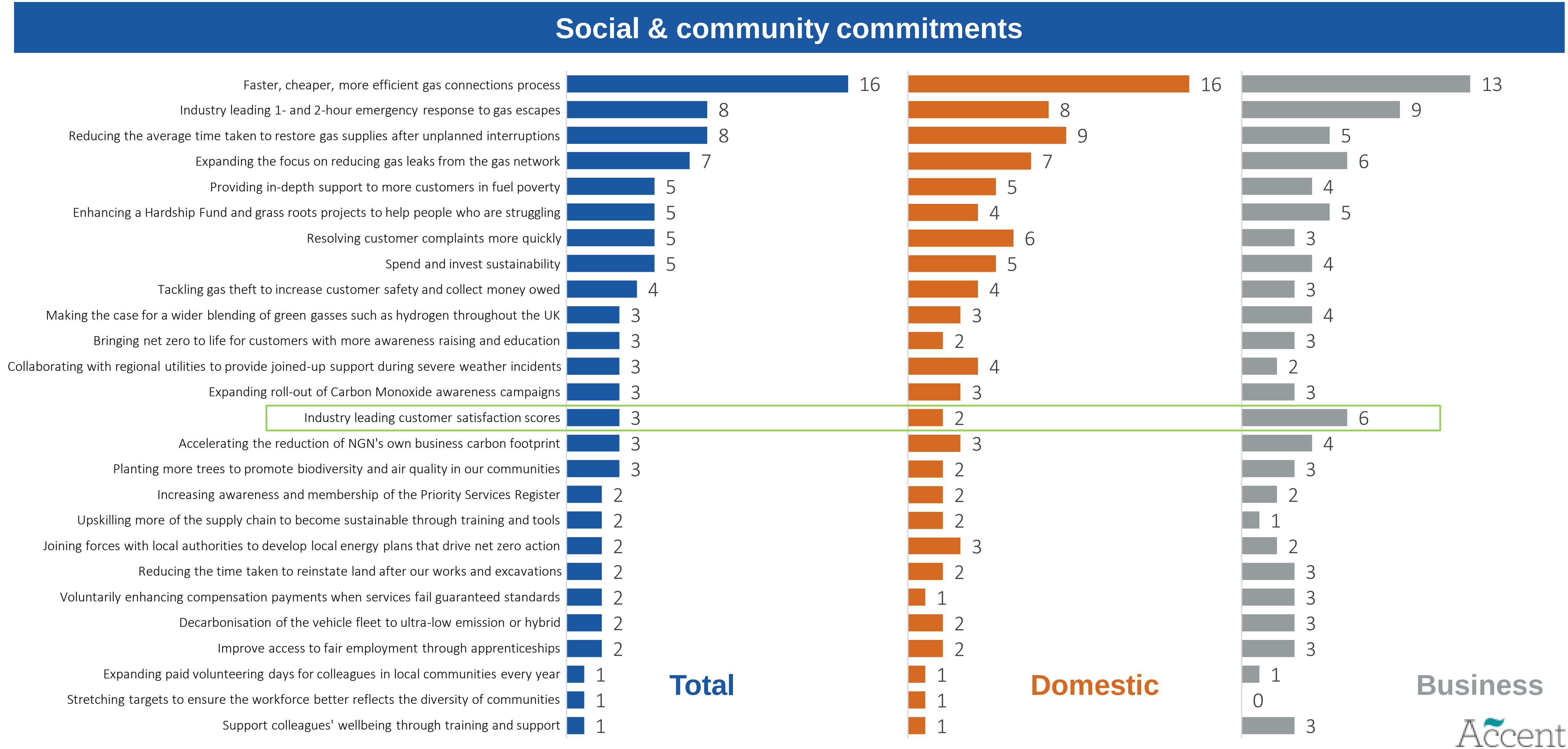
Uninformed vs Informed priority (Jan 24)

Q26. Please rank the following from 1-8 (where 1 is the most important) to indicate which you feel are the most important for NGN to focus on (wave 1: 1,411, wave 2: 1,124, wave 3: 1,355, wave 4: 1,403) Q48. We would like you to take another look at the business areas we showed you earlier, having learned more about NGN. Please rank them from 1-7 (where 1 is the most important) to indicate which you feel are the most important for NGN to focus on from 2021 to 2026. (wave 1: 1,411, wave 2: 1,124, wave 3: 1,355, wave 4: 1,403)

Social commitments

Faster, cheaper and more efficient gas connection is top community commitment for both Domestic and business participants. Business customers were more likely to pick ***industry leading customer satisfaction score*** as an area for NGN to focus on

New question(s)



Q26b. Please rank the following to indicate which you feel are the most important for NGN to focus on: wave 4: 1,403, Domestic: 1,167, Business: 236 New question in wave 4

New question(s)

Social commitments - Domestic

Within the domestic sample and among top commitments, little significant differences can be seen among age, gender and social grades. Those struggle financially were significantly more likely to pick ***reducing the average time taken to restore gas supply after unplanned interruptions***

Social & community commitments - Domestic

Customers who are digitally engaged, use a pre-payment meter, and are not white are more likely to prefer a *"Faster, cheaper, and more efficient gas connections process."*

Faster connections: Offer multilingual online/app applications for non-white, digitally engaged customers to streamline processes.

Customers who pay their bills without difficulty and are not financially struggling are more likely to prefer a *"Reduction in the average time taken to restore gas supplies after unplanned interruptions."*

Reduced outage disruptions: Analyse challenges faced by financially secure customers during outages for targeted solutions (e.g., location, communication).

Customers who are 75 years old or older and in the ABC1 social class are more likely to prefer *"Industry-leading 1- and 2-hour emergency response to gas escapes."*

Rapid emergency response: Tailor communication to inform older (75+) and affluent (ABC1) customers about existing rapid response times.

Customers who are digitally disengaged, use a pre-payment meter, and receive benefits are more likely to prefer *"Providing in-depth support to more customers in fuel poverty."*

Fuel poverty support: Partner with organisations to reach digitally disengaged, pre-payment meter users, those on benefits and deliver fuel poverty support information.

Q26b. Please rank the following to indicate which you feel are the most important for NGN to focus on: Domestic: 1,167 New question in wave 4

Energy use and concerns

Worries about paying energy bills continued to be high across the board

However, concerns about how much customers spend on energy had decreased

For vulnerable customers, especially those who struggled financially, saving energy continued to be the trend

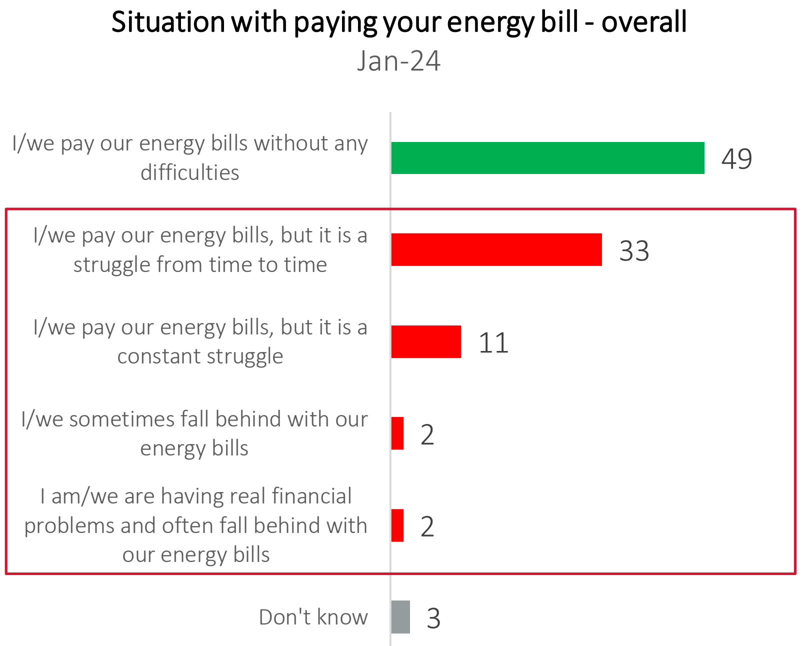
Tracking question(s)

Paying energy bills

In wave 4 (Jan 2024), the proportion of domestic customers who reported paying their energy bills without difficulty increased significantly from 44% to 49%. While nearly half of the participants still said they paid with difficulty, this increase is a positive trend.

Situation with paying your energy bill - overall

Overall	Jan 21	Jan 22	Jan 23	Jan 24
Pay without any difficulties	67%	58%	48%	49%
Pay with difficulties	30%	40%	50%	48%



Domestic

Domestic	Jan 21	Jan 22	Jan 23	Jan 24
Pay without any difficulties	66%	53%	44%	49%
Pay with difficulties	33%	46%	55%	51%

Business

Business	Jan 21	Jan 22	Jan 23	Jan 24
Pay without any difficulties	69%	58%	48%	49%
Pay with difficulties	19%	35%	43%	41%

Q55. Which one of the following statements best describes your situation with paying your energy bill? (Tracking question) (wave 1 = 1,411; Domestic: 1,148; Business 263) (wave 2 = 1,124; Domestic 952, Business: 172; wave 3= 1,355, Domestic 1,100, Business 255, wave 4: 1,403, Domestic: 1,167, Business: 236)

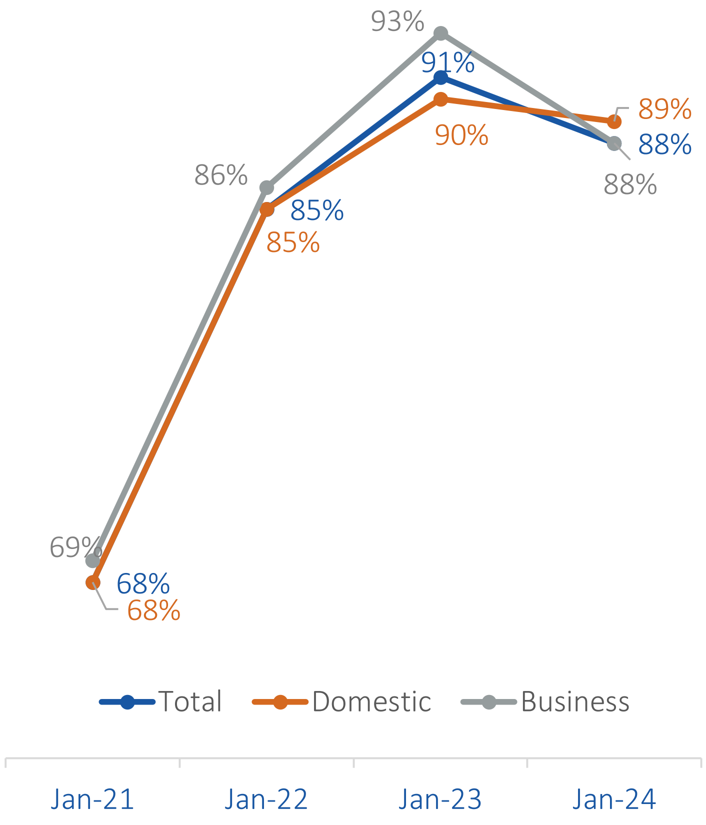
Concerned about energy usage & cost

While the proportion of customers reported being concerned about energy cost was still high, there had been a reduction in the percentage that worried about energy and how much energy they consumed

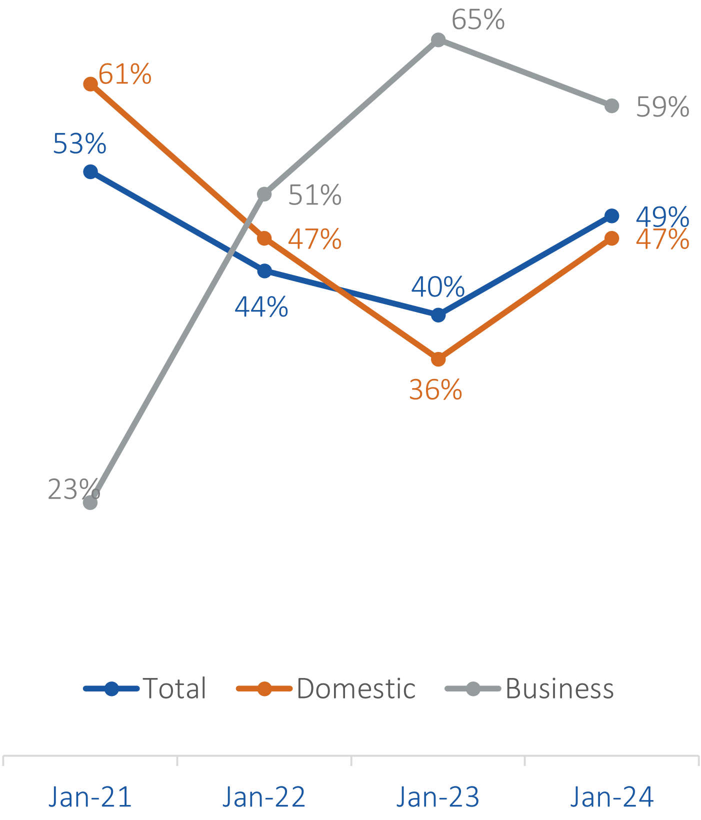
Tracking question(s)

Agreement about energy usage and cost - Top 2 box agreement

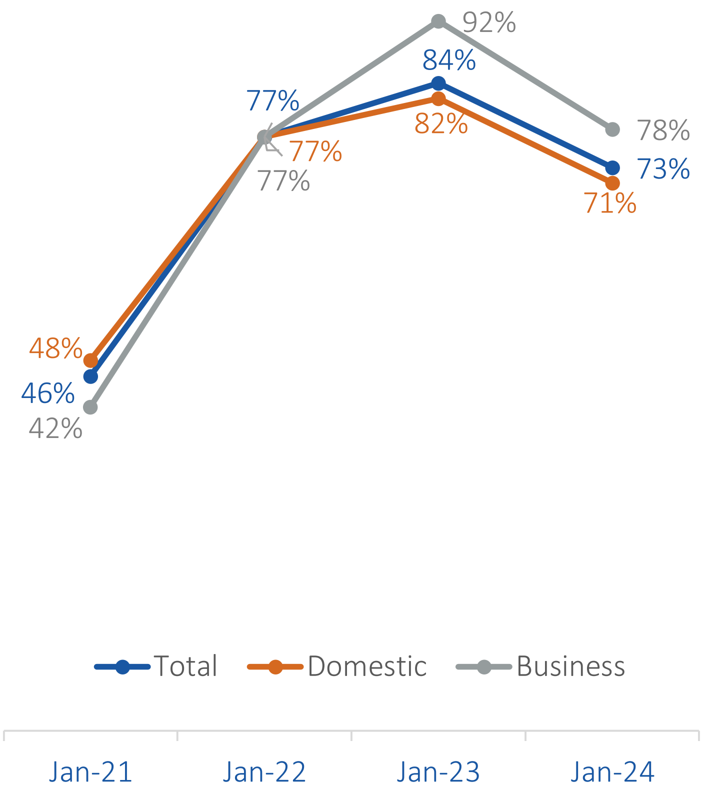
I am concerned about the amount of money we spend on energy



Our household/business uses more energy now than we did last year



I am more worried now about the energy that I use now than last year

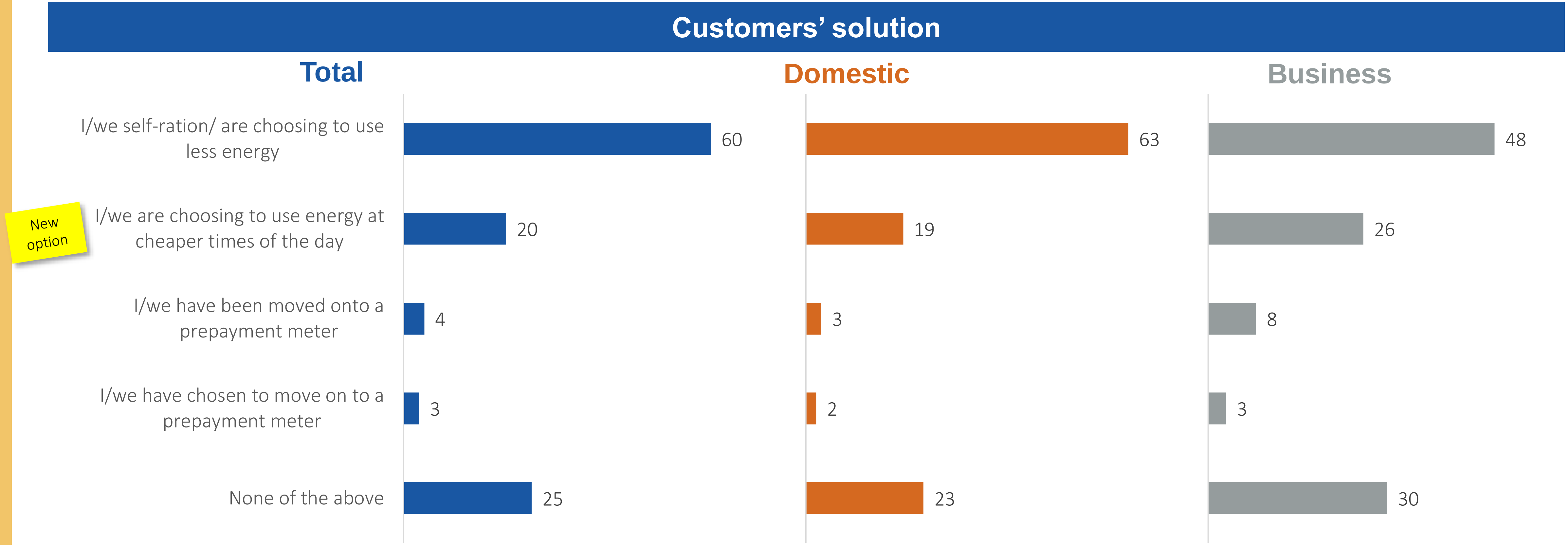


Q27r1. How much do you agree or disagree with the following statements? (Tracking question) (wave 1 = 1,411; Domestic: 1,148; Business 263) (wave 2 = 1,124; Domestic 952, Business: 172) wave 3= 1,355, Domestic 1,100, Business 255, wave 4: 1,403, Domestic: 1,167, Business: 236)

Impact of energy crisis

Overall, 3 out of 5 reported choosing to use less energy – followed by 20% reported they use energy at cheaper times of the day.

New question(s)



Q55a. Do any of the following apply to you? wave 4: 1,403, Domestic: 1,167, Business: 236 New question in wave 3 – added option in wave 4

Impact of energy crisis - in subgroups

Vulnerable customers such as those who struggled to pay their bills and those in lower social grades were significantly more likely to have altered their energy usage & method to save money

New question

Customers' solution

		Age					SEG				Gender	
	Domestic	18-24	25-34	35-54	55-74	75+	AB	C1	C2	DE	Male	Female
I/we self-ration/ are choosing to use less energy	63	49	59	60	69	63	58	63	60	70	58	66
New option I/we are choosing to use energy at cheaper times of the day	19	32	22	21	15	11	20	22	17	16	18	20
I/we have been moved onto a prepayment meter	3	6	5	3	1	2	3	1	2	5	2	4
I/we have chosen to move on to a prepayment meter	2	3	5	3	1	1	2	2	3	3	2	2
None of the above	23	23	21	22	24	34	28	22	22	21	28	20

	Digital status		Bills			Financial hardship		Way to pay			Ethnicity		On benefit	
	Digitally disengaged	Online	Pay without difficulty	Struggle from time to time	Constant struggle / fall behind	Yes	No	Pre-payment meter	Direct Debit	Credit	White	Non-White	Yes	No
I/we self-ration/ are choosing to use less energy	63	60	55	66	68	66	55	61	61	58	63	58	65	58
New option I/we are choosing to use energy at cheaper times of the day	6	21	16	28	20	25	16	16	21	23	18	30	22	19
I/we have been moved onto a prepayment meter	6	4	1	4	10	6	1	17	2	3	3	3	5	3
I/we have chosen to move on to a prepayment meter	2	3	1	2	8	4	1	13	1		2	6	5	2
None of the above	29	24	33	14	12	14	33	13	25	24	24	17	19	27

Sig higher/lower than at least one attribute in the same category at 95% confidence levels

Q55a. Do any of the following apply to you? wave 3= 1,355, Domestic 1,100, Business 255 New question in wave 3 – added option in wave 4

Sustainability Commitments

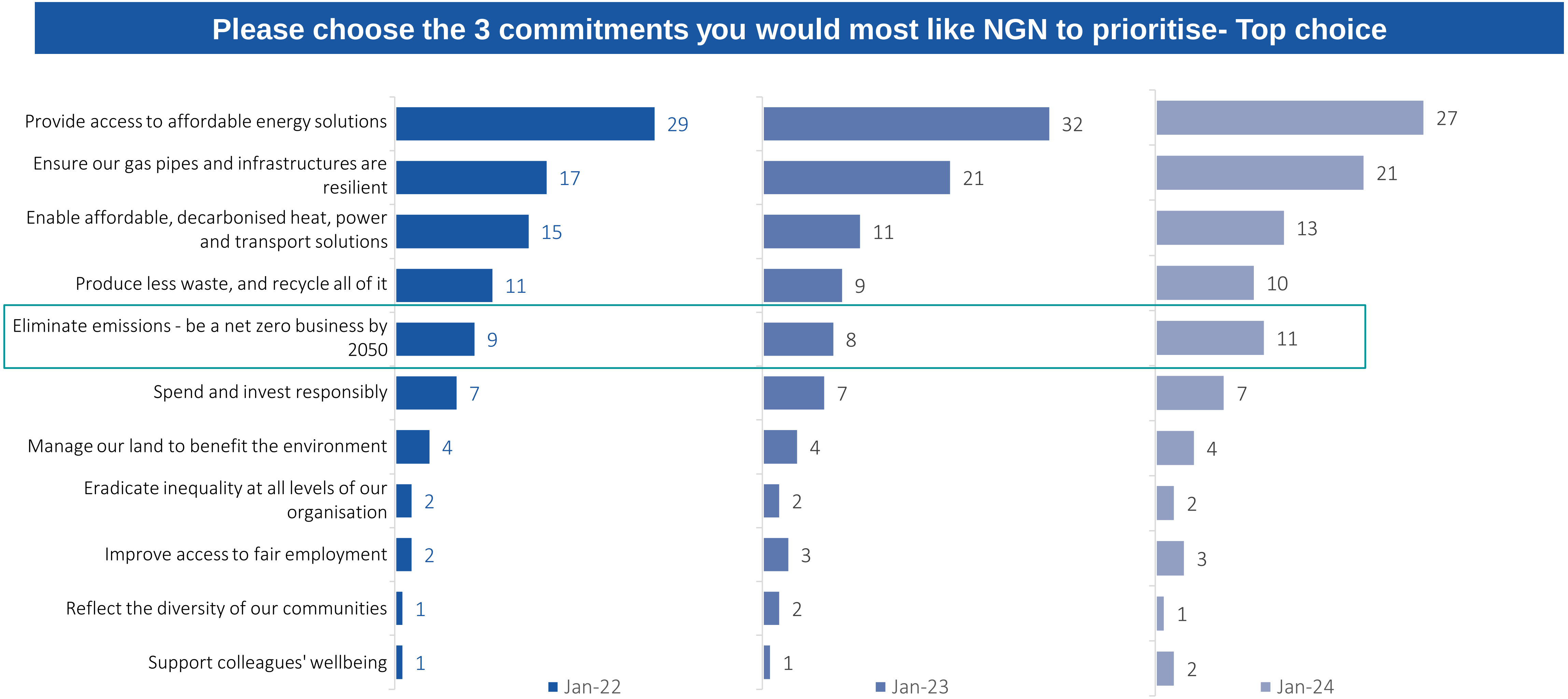
Access to affordable energy solutions was the top priority commitment for both business and domestic customers, especially those who struggled financially

Waste reduction, recycling performance, and actions to promote low-carbon energy were topics customers would like NGN to communicate about

NGN's sustainability commitments - Overall

While *Access to affordable energy solutions* remained the top priority last year, slightly more focus had been shifted to Net Zero this wave

Tracking question(s)



Q30a1. Please look at the list of commitments and choose the 3 commitments you would most like NGN to prioritise: First commitment) (wave 2 = 1,124; Domestic 952, Business: 172, wave 3= 1,355, Domestic 1,100, Business 255, wave 4: 1,403, Domestic: 1,167, Business: 236) New question in wave 2

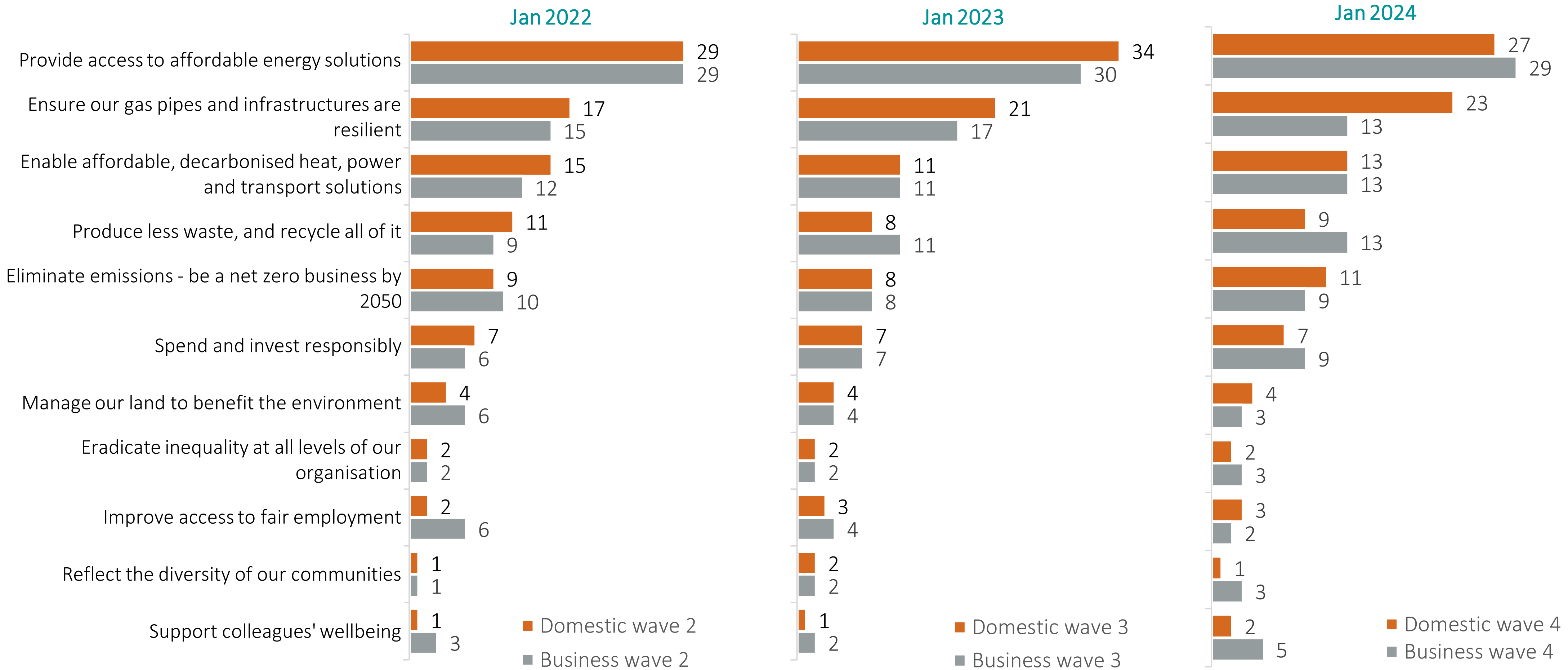
Accent

NGN's sustainability commitments - by Business and Domestic

Environmental commitments were relatively similar for both domestic and business customers, however business participants were more likely to pick *access to affordable energy solutions* while domestic customers preferred *resilient infrastructure*

Tracking question(s)

Please choose the 3 commitments you would most like NGN to prioritise- Top choice



Q30a1. Please look at the list of commitments and choose the 3 commitments you would most like NGN to prioritise: First commitment) (wave 2 = 1,124; Domestic 952, Business: 172, wave 3= 1,355, Domestic 1,100, Business 255, wave 4: 1,403, Domestic: 1,167, Business: 236) New question in wave 2

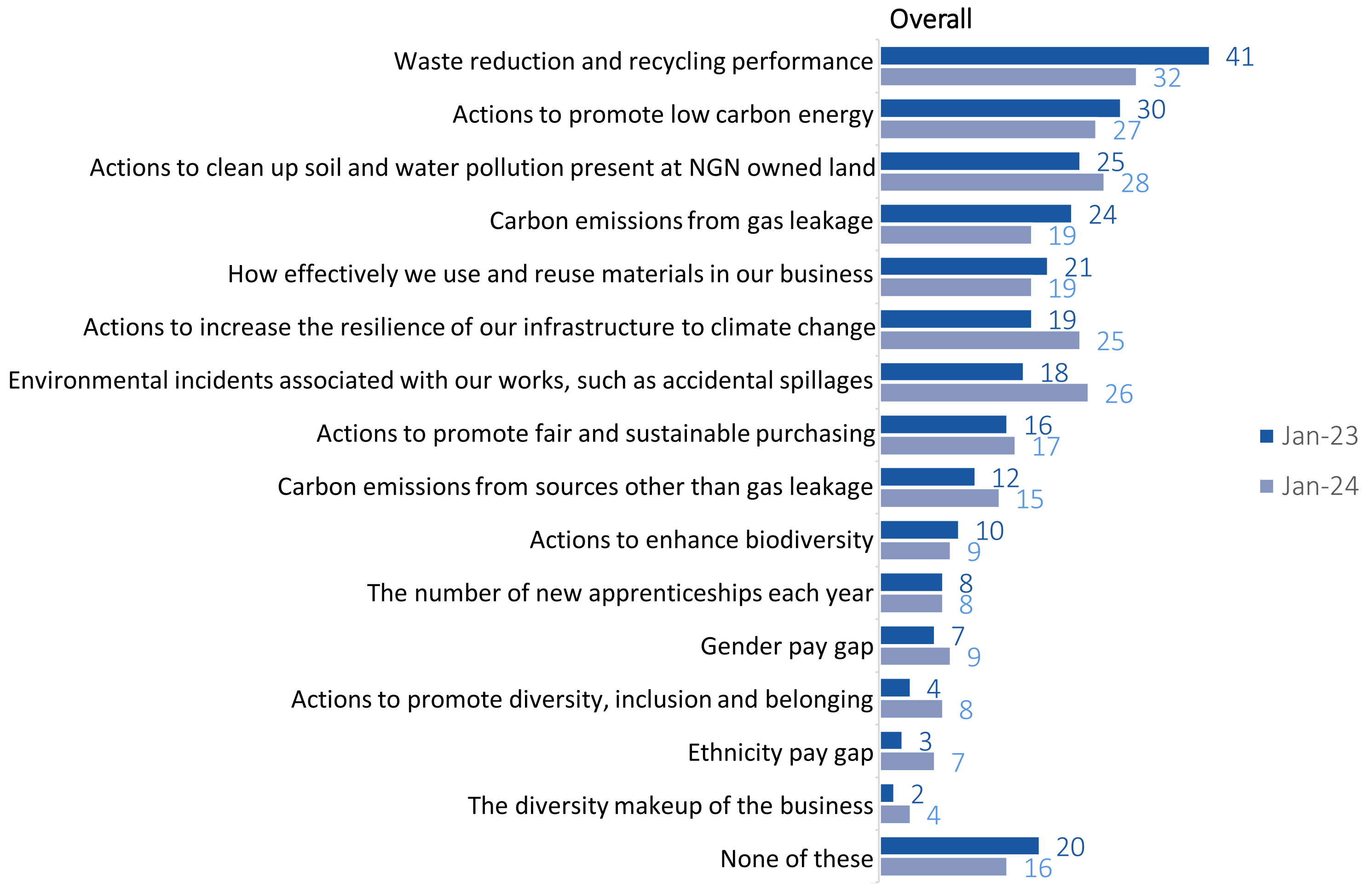
Accent

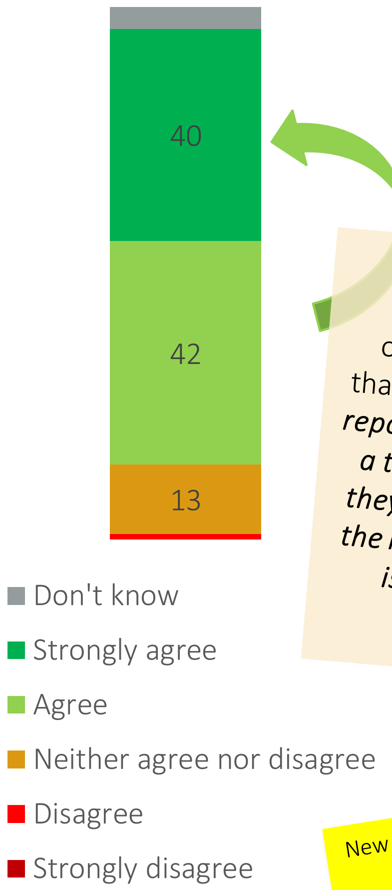
Information on NGN's sustainability commitments

While there had been a decline, waste reduction and recycling performance remained the top choice, followed by actions to promote low carbon energy. Little differences can be seen among the domestic and business sample

Tracking question(s)

Information customers like to know about Northern Gas Networks' sustainable performance





82%
of all participants agreed that *"Company sustainability reports need to be checked by a third-party expert before they are published to ensure the information they contain is correct as possible"*

New question in wave 4

Q33a. What information would you as a customer like to know about Northern Gas Networks` sustainable performance each year? (wave 3= 1,355, Domestic 1,100, Business 255, wave 4: 1,403, Domestic: 1,167, Business: 236) Q33d. How much do you agree or disagree with the following statement? (new question in wave 4)

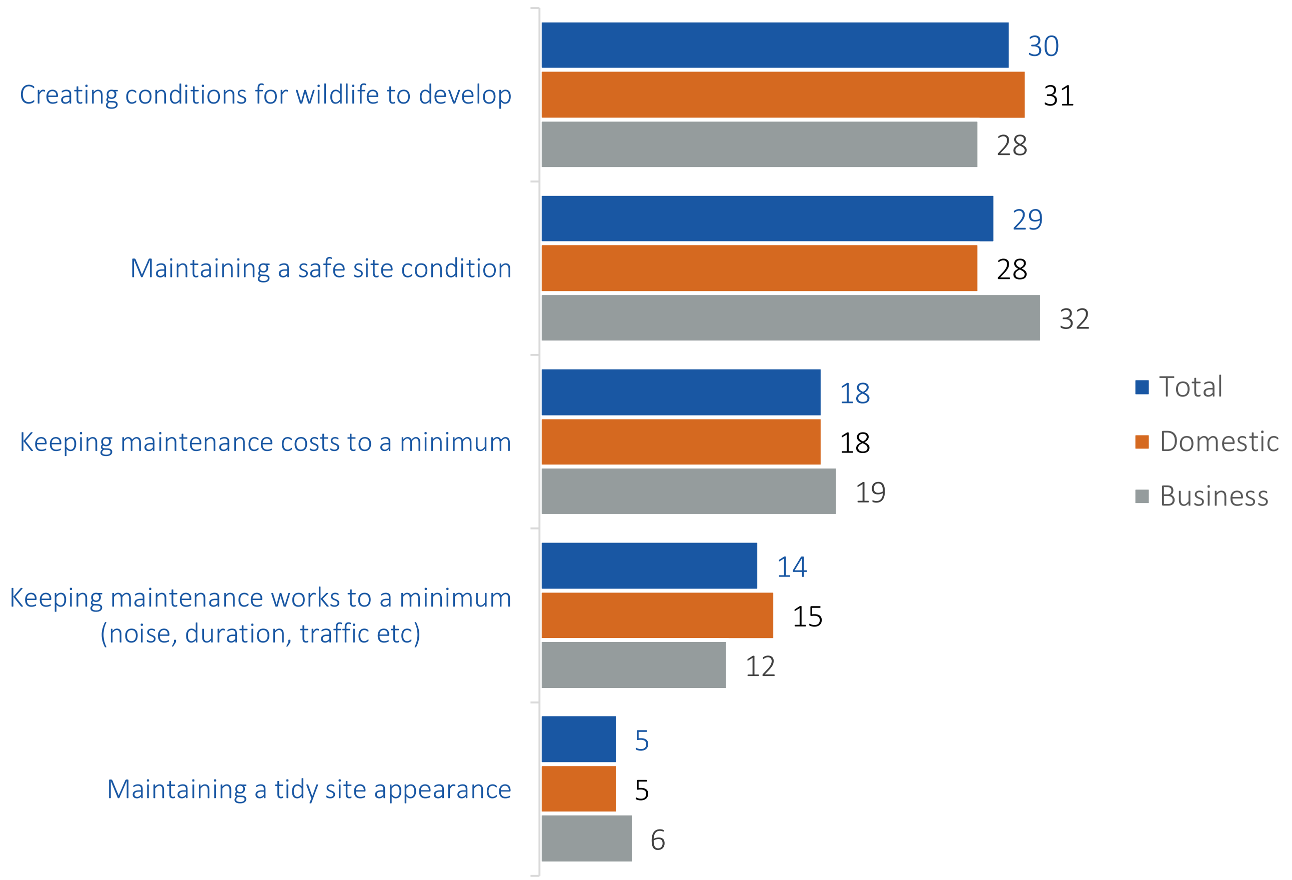
Accent

Land management

Less than a third (30%) of all participants thought that the most important aspect of land management for NGN is to create condition for wildlife to develop, and a similar proportion voted for maintaining a safe site condition

New question(s)

Perception about land management



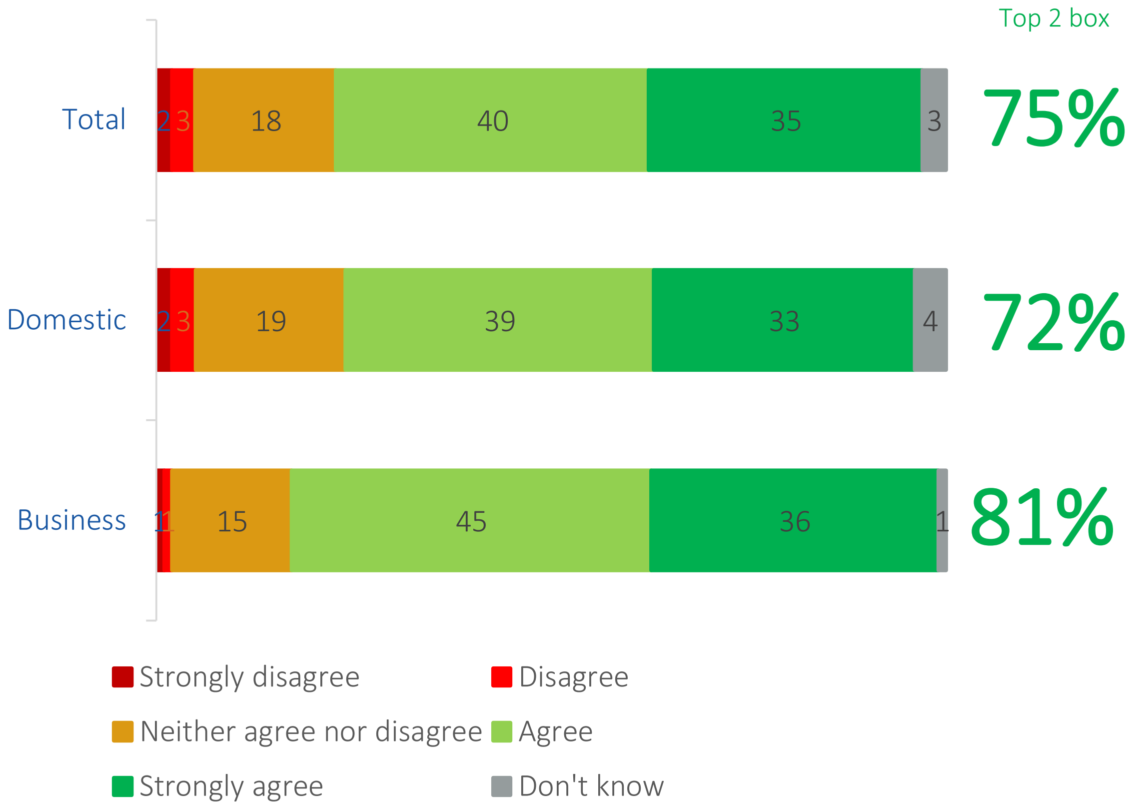
Q33e. Please look at the list of approaches to land management below and choose the 3 approaches you would most like Northern Gas Networks to prioritise: (wave 4: 1,403, Domestic: 1,167, Business: 236) New question in wave 4

NGN environmental responsibility

The majority of customers agreed that NGN should use low and zero emission vehicles – especially Business participants

NGN environmental responsibility (transport) - Top 2 box

It is important that large, regulated companies like NGN use low and zero emission vehicles



New question(s)

Q33f. How much do you agree or disagree with the following statement? (wave 4: 1,403, Domestic: 1,167, Business: 236)

Accent

Future Energy & Heating system

Awareness of hydrogen technology remained stable however positive perception had declined

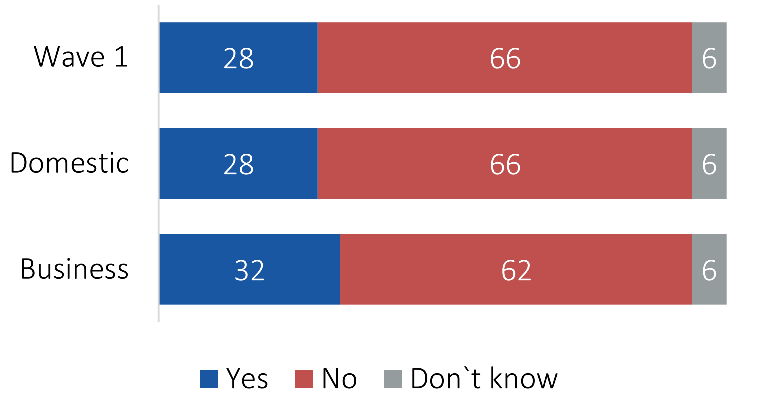
Customers wanted the ability to make a choice about the type of energy in their local area

Tracking question(s)

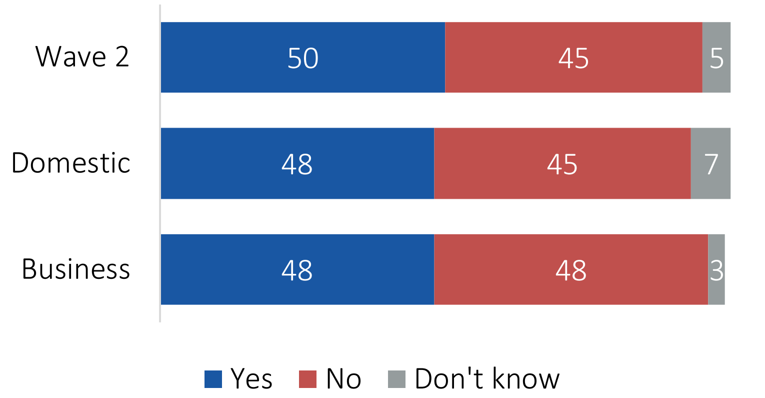
Awareness of hydrogen

Awareness of hydrogen remained stable in wave 4 with half (50%) of all participants reporting knowledge of the technology. No significant differences between Domestic and Business customers

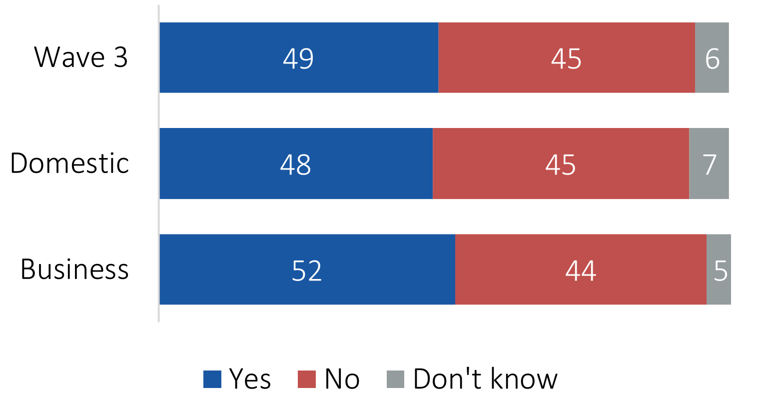
Awareness of hydrogen - Jan 21



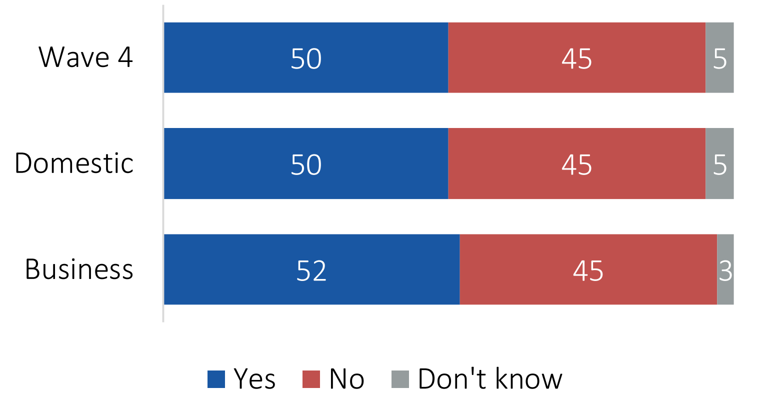
Awareness of hydrogen - Jan 22



Awareness of hydrogen - Jan 23



Awareness of hydrogen - Jan 24



Q35. Before today, had you heard of hydrogen being used as an alternative gas for heating and cooking in our homes and businesses?– Tracking question (wave 1 = 1,411; Domestic: 1,148; Business 263) (wave 2 = 1,124; Domestic 952, Business: 172, wave 3= 1,355, Domestic 1,100, Business 255, wave 4: 711, Domestic 606, Business: 105)

Awareness and perception of future technology

Heat pumps continued to have the highest awareness levels of the 4 future technologies. While awareness remained relatively stable when compared to previous waves, positive perception had declined significantly for Hydrogen boiler and District Heat network

Tracking question(s)

Awareness of future technologies overall

Aware	Jan 22	Jan 23	Jan 24
Hydrogen boilers	55%	54%	56%
District heat networks	39%	36%	41%
Heat pumps	87%	86%	87%
Hydrogen fuelled cars	67%	67%	69%

Perception of future technologies overall

Very or Somewhat positive	Jan 22	Jan 23	Jan 24
Hydrogen boilers	52%	50%	$\boxed{44\%}$
District heat networks	47%	46%	$\boxed{40\%}$
Heat pumps	39%	40%	37%
Hydrogen fuelled cars	46%	48%	46%

Sig lower than the previous wave

Q35ar1. Which of the following technologies have you heard of? (wave 2 = 1,124, wave 3= 1,355, wave 4: 711) New question in wave 2
Q35B. ASK FOR ALL HEARD OF AT Q35A And what is your perception of the following technologies? (only those who were aware) New question in wave 2

Accent

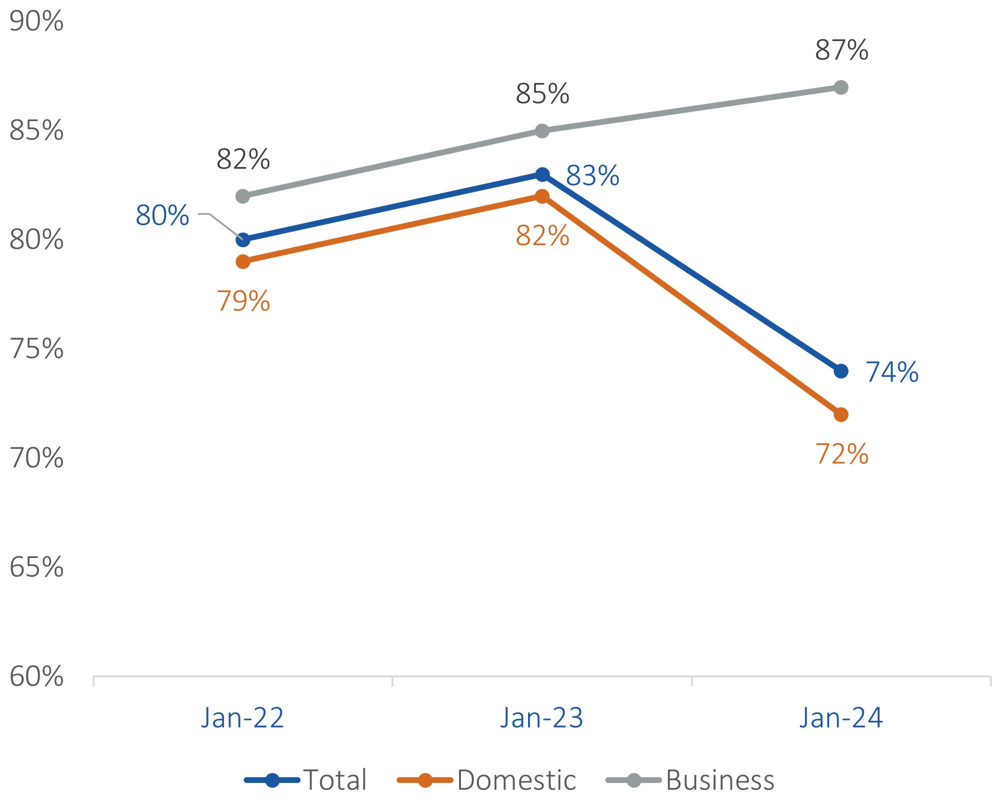
Tracking question(s)

Future of heating and the importance of choice

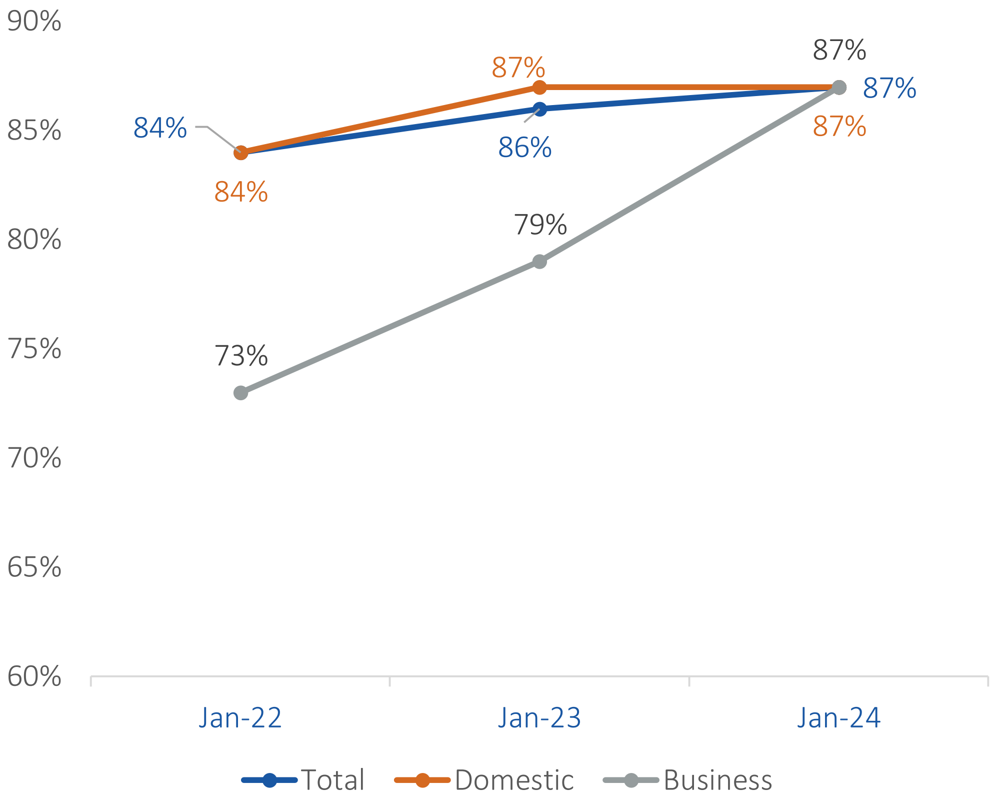
Despite a decline in agreement, the majority of customers agreed that the way we heat our homes would change in the next 10 years and 87% thought it is important to be able to choose the main sources of energy.

Heating prediction & Energy sources preference - Top 2 box

The way people in the UK heat their homes and business is likely to change in the next 10 years



It is important that I am able to choose the main sources of energy that is used in my home/business

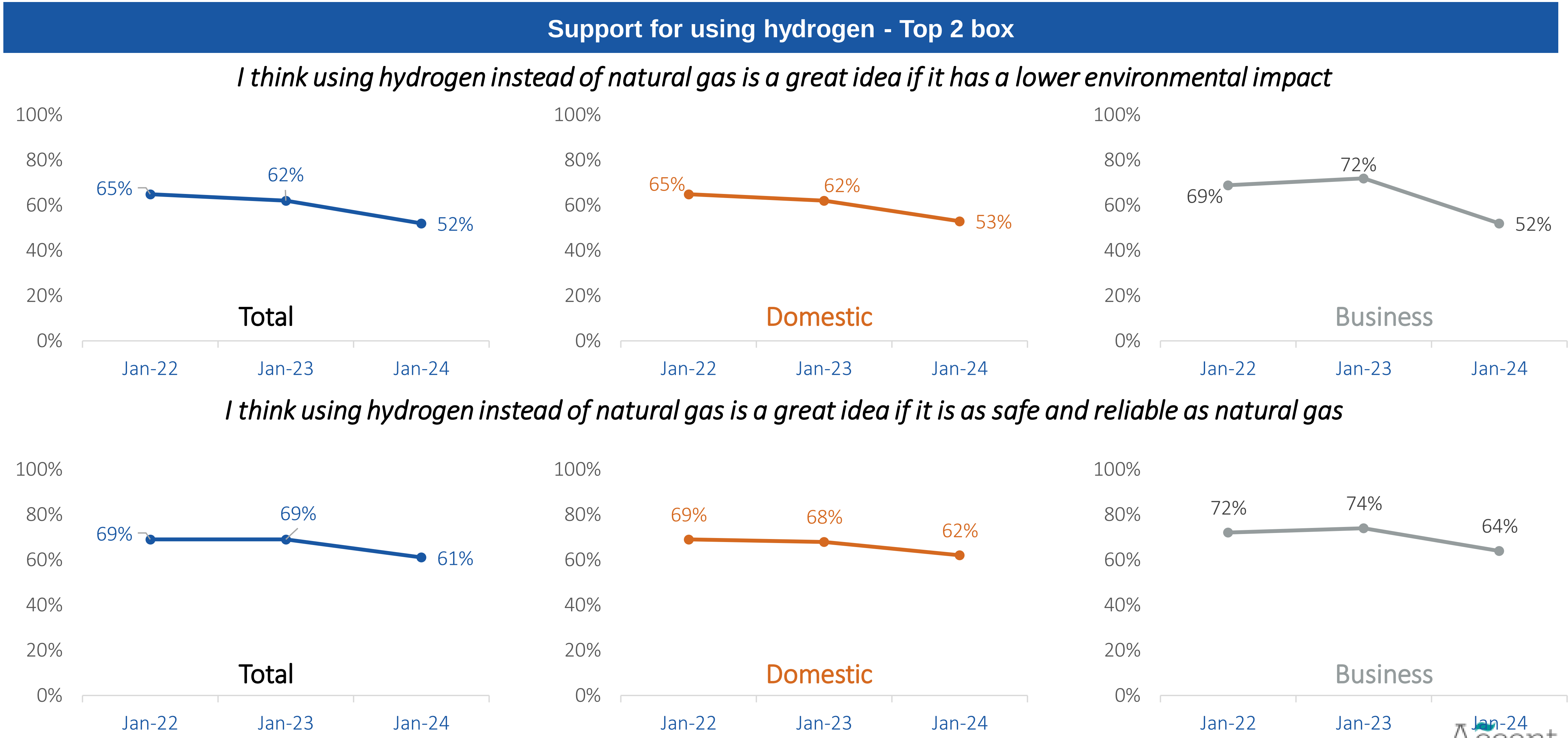


Q34ar1-r2. How much do you agree or disagree with the following statements? (Tracking question) (wave 2 = 1,124; Domestic 952, Business: 172, wave 3= 1,355, Domestic 1,100, Business 255, wave 4: 711, Domestic 606, Business: 105)

Tracking question(s)

Perception of hydrogen gas in relation to the environment, safety and transport

While there had been a decline in positive perception about hydrogen as a replacement for natural gas in wave 4, over half of all participants agreed this technology would be great if it had lower environmental impact and safe & reliable.



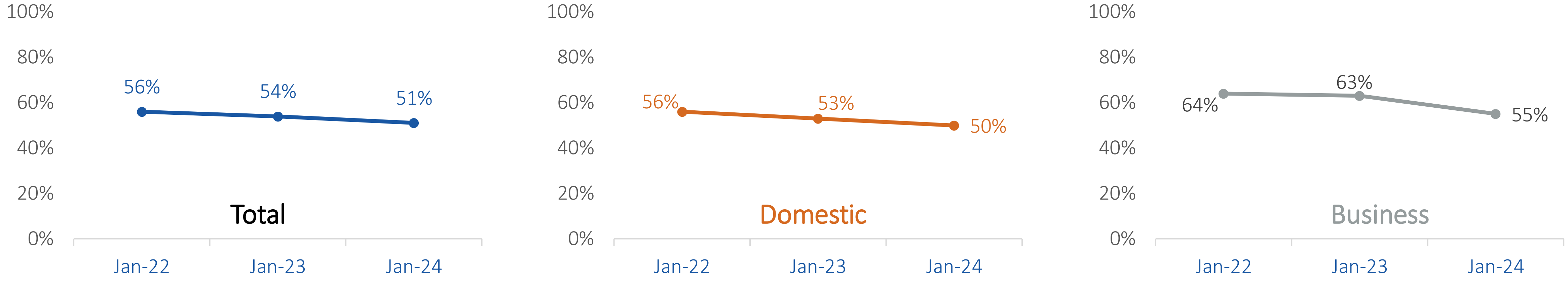
Q36r1-ar1. How much do you agree or disagree with the following statements? (Tracking question) (wave 2 = 1,124; Domestic 952, Business: 172, wave 3= 1,355, Domestic 1,100, Business 255, wave 4: 692, Domestic:561, Business 131)

<u>Perception of hydrogen gas</u> in relation to the environment, safety and transport

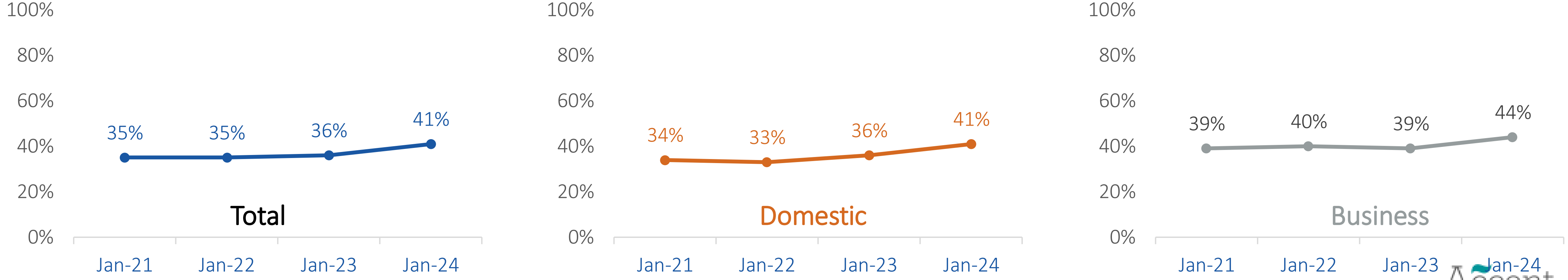
Concerns with hydrogen has increased last wave for both Domestic and Business customers, while positive perception about using hydrogen in transport had decreased slightly

Hydrogen in transport & Concerns- Top 2 box

I think using hydrogen in transport is a good idea



I would have some concerns with hydrogen being used in homes and businesses instead of natural gas

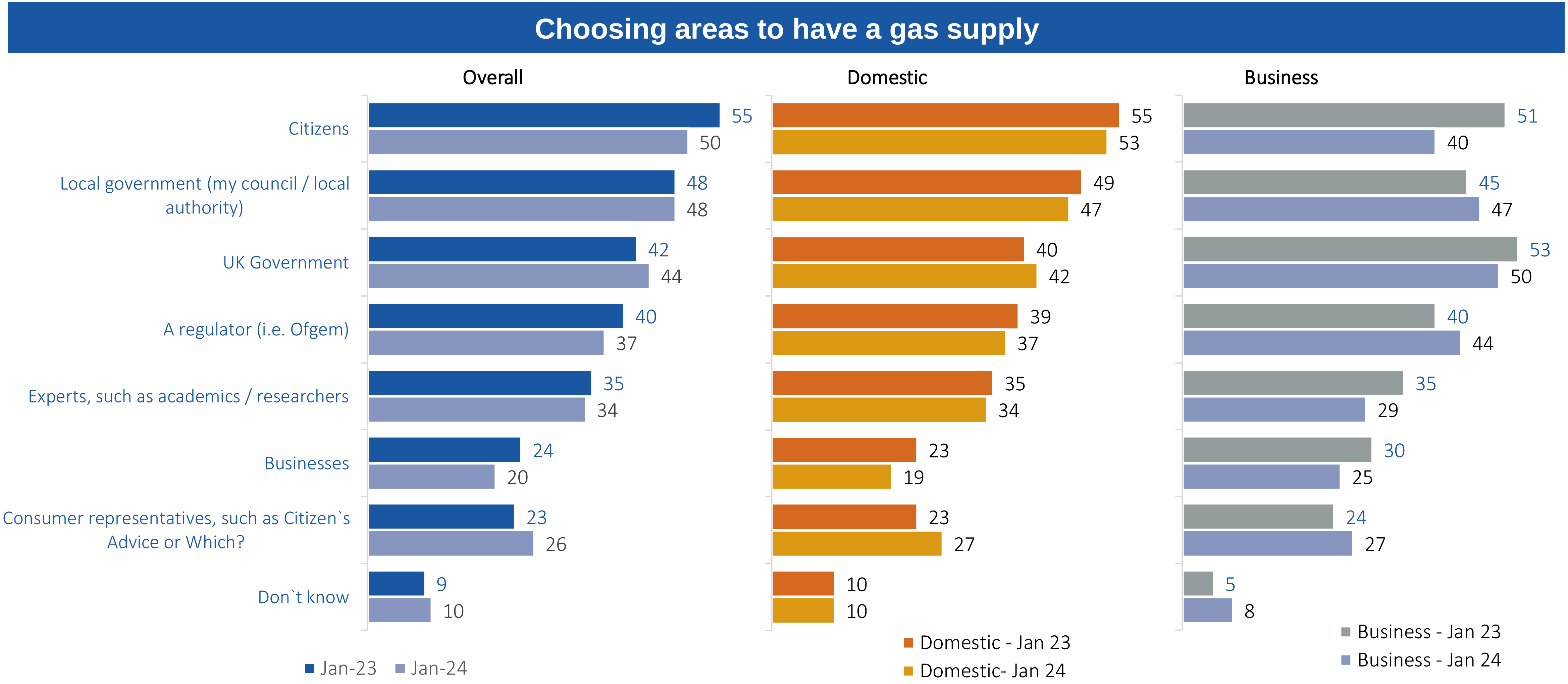


Q36r2-ar2. How much do you agree or disagree with the following statements? (Tracking question) (wave 2 = 1,124; Domestic 952, Business: 172, wave 3= 1,355, Domestic 1,100, Business 255, wave 4: 692, Domestic:561, Business 131)

Who should be responsible for deciding which areas have a gas supply

About half thought citizens should be involved in deciding which areas continue to have a gas supply, with local government continued to be the second most popular option (48%). Little variances can be seen among different subgroups.

Tracking question(s)



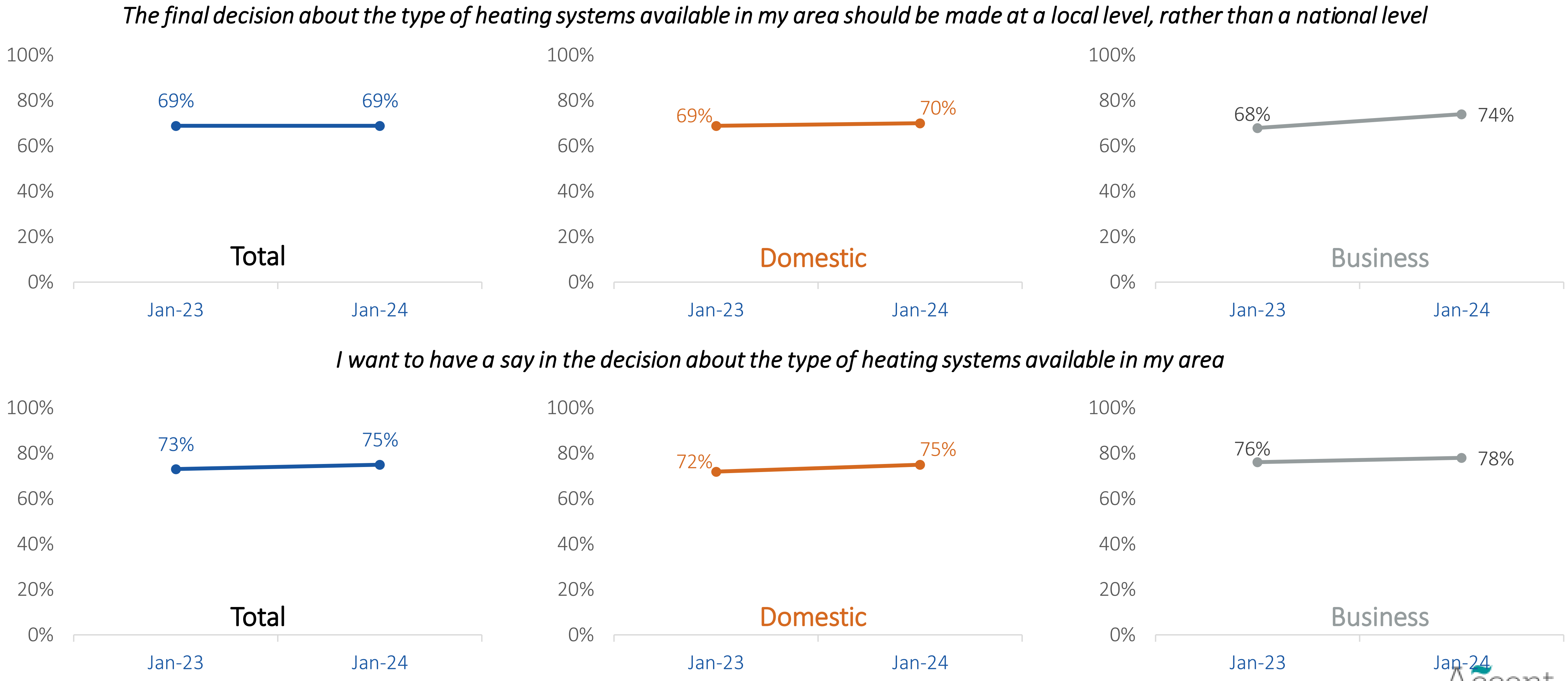
Q37a. Who do you think should be involved in deciding which areas continue to have a gas supply, and which areas will not have a gas supply? wave 3= 1,355, Domestic 1,100, Business 255, wave 4: 692, Domestic:561, Business 131)New question in wave 3

Tracking question(s)

Decision about having a gas supply

Similar to last wave, the majority of participants (69%) agreed that the decision about the type of heating system in their area should be a localised decision, with them having a say in the decision making process (75%).

Decision about having a gas supply - (top 2 box agreement)

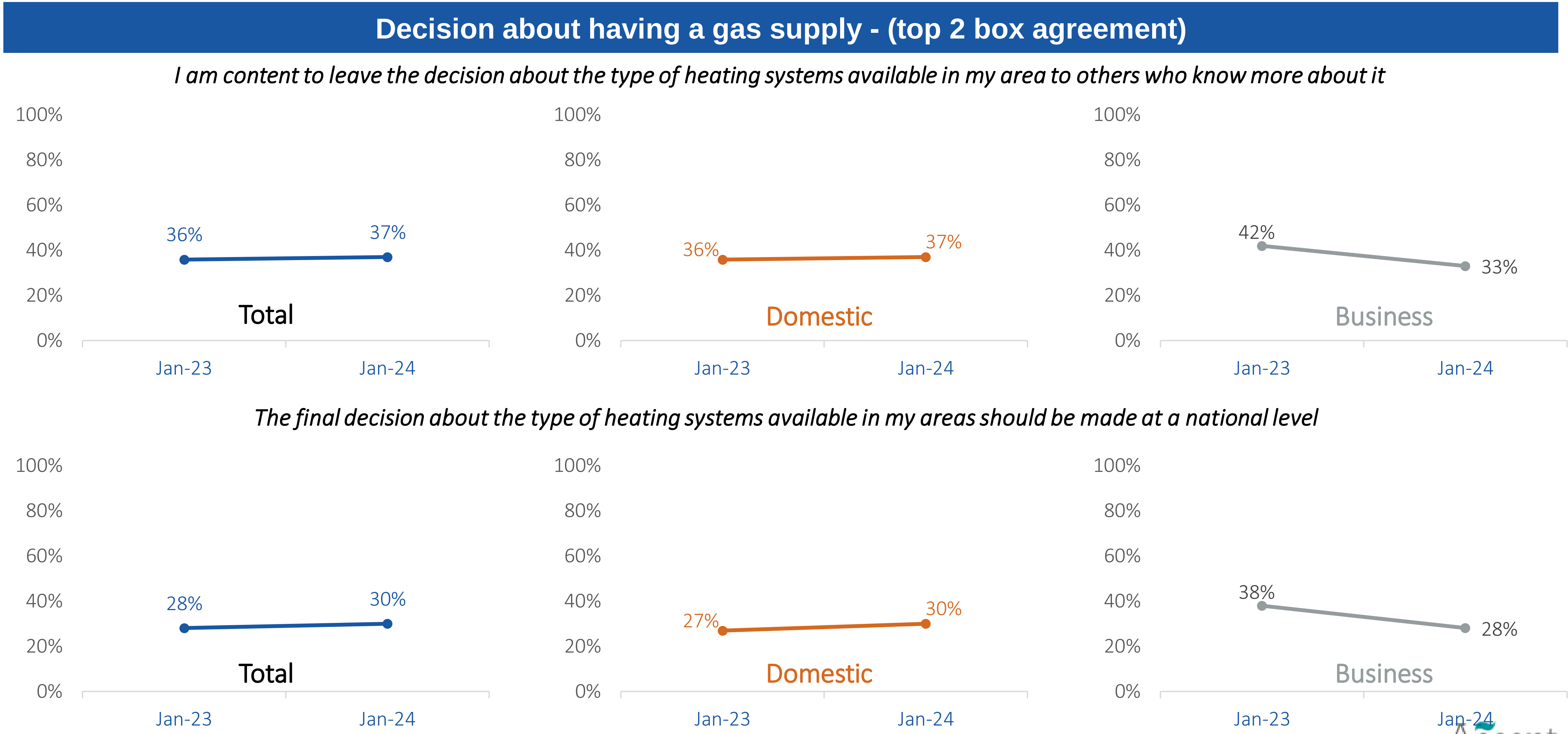


Q37br1-r2. How much do you agree or disagree with the following statements? wave 3= 1,355, Domestic 1,100, Business 255, wave 4: 692, Domestic:561, Business 131 New question in wave 3

Decision about having a gas supply

Similar to previous wave, 3 in 10 agreed that the decision about the type of heating should be made at a national level and around a third (37%) thought they should leave this decision to others who know more.

Tracking question(s)



Q37br1-r2. How much do you agree or disagree with the following statements? wave 3= 1,355, Domestic 1,100, Business 255, wave 4: 692, Domestic:561, Business 131 New question in wave 3

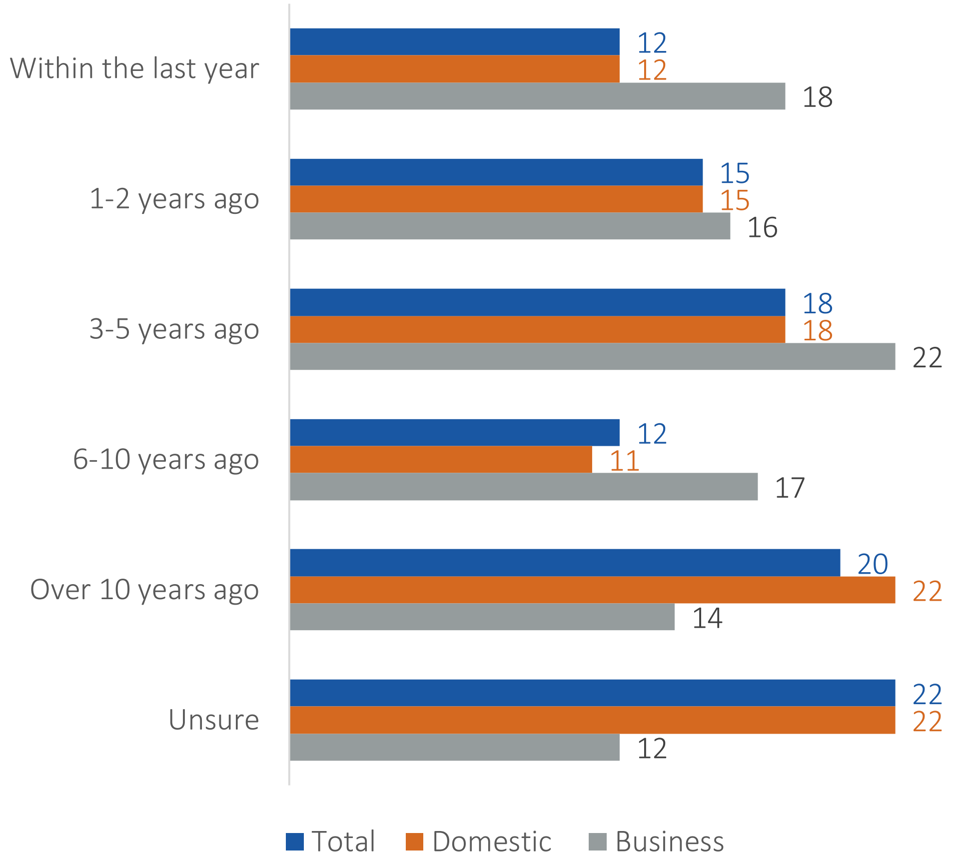
Heating system at home

About a quarter of all participants reported having to make a decision about their heating system in the last 2 years. Cost – including upfront cost, cost of installation and running cost are top of mind when considering a new heating system.

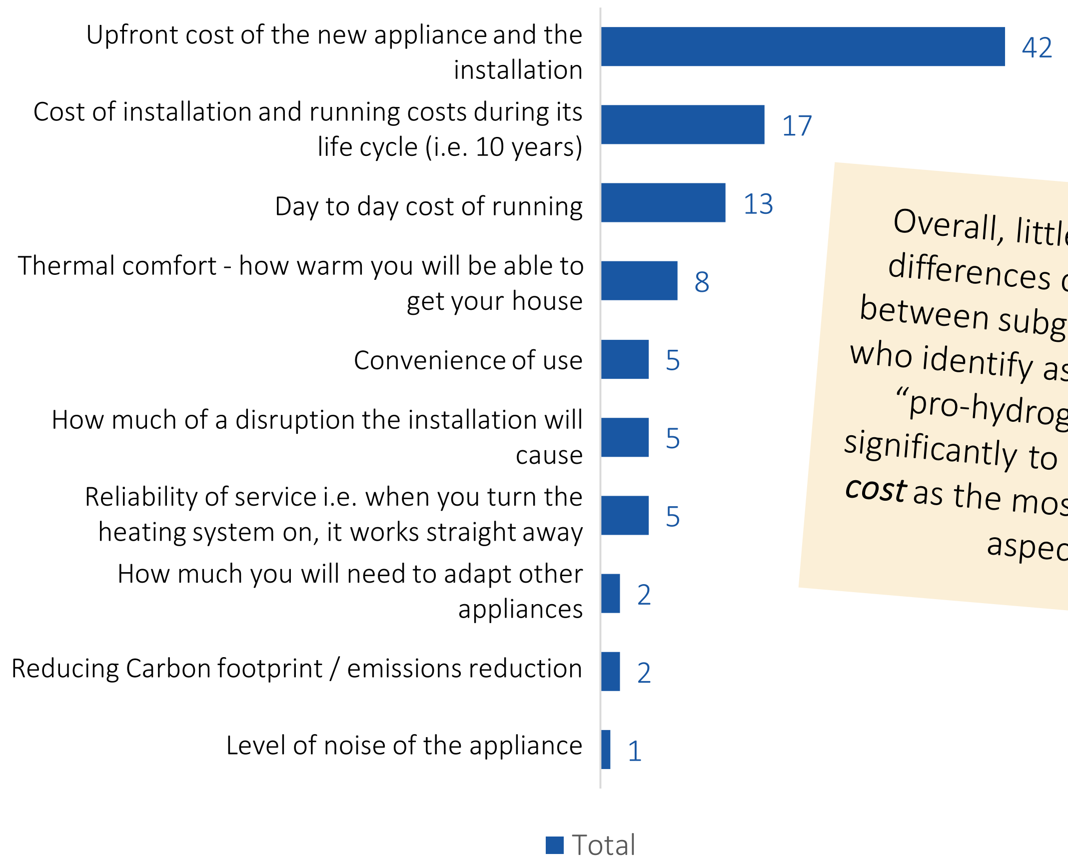
New question(s)

Decision about heating system - (top 2 box agreement)

Last have to make a choice about heating system



Most important aspects of a new heating system



Overall, little significant differences can be seen between subgroups. Those who identify as "white" and "pro-hydrogen" were significantly to pick ***Upfront cost*** as the most important aspect.

Q35b2. When did you last have to make a choice about your heating system? Q35c. If you had to install a new heating system which of the 3 following factors would be most important to you. Wave 4: 711, Domestic:606, Business 105 New question in wave 4

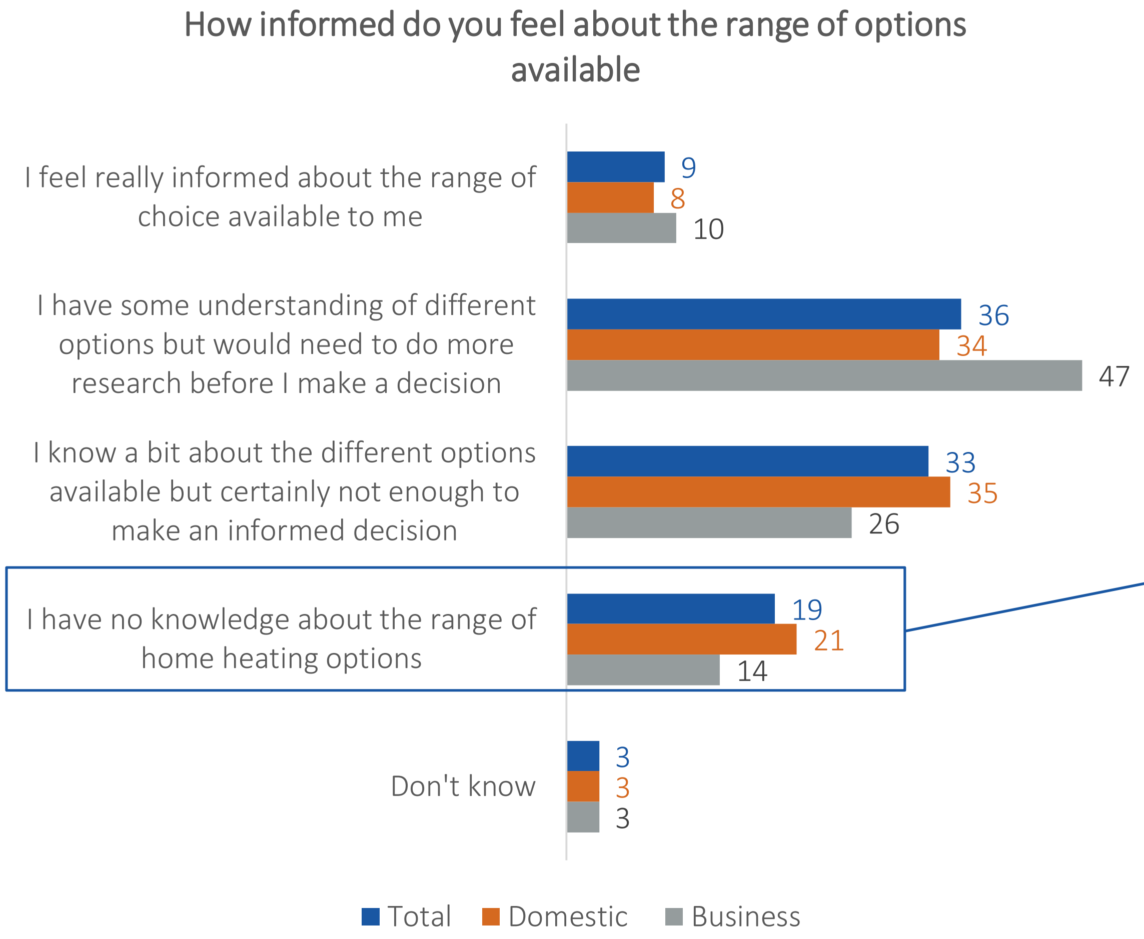
Accent

Heating system at home – Knowledge

1 in 5 reported having no knowledge about the range of home heating option – this is particularly more noticeable in vulnerable customer groups

New question(s)

Knowledge about the range of home heating options



Customers who are female, digitally disengaged, financially vulnerable and those on benefits were significantly more likely to say they have no knowledge about the range of home heating options.

To ensure equitable participation and informed decision-making, targeted messaging and educational initiatives should be directed toward these specific groups. This would promote fairness and empower them to confidently choose the most suitable heating system for their needs.

Accent

Q35d. If you had to install a new heating system, how informed do you feel about the range of options available to you? Wave 4: 692, Domestic: 561, Business 131 New question in wave 4

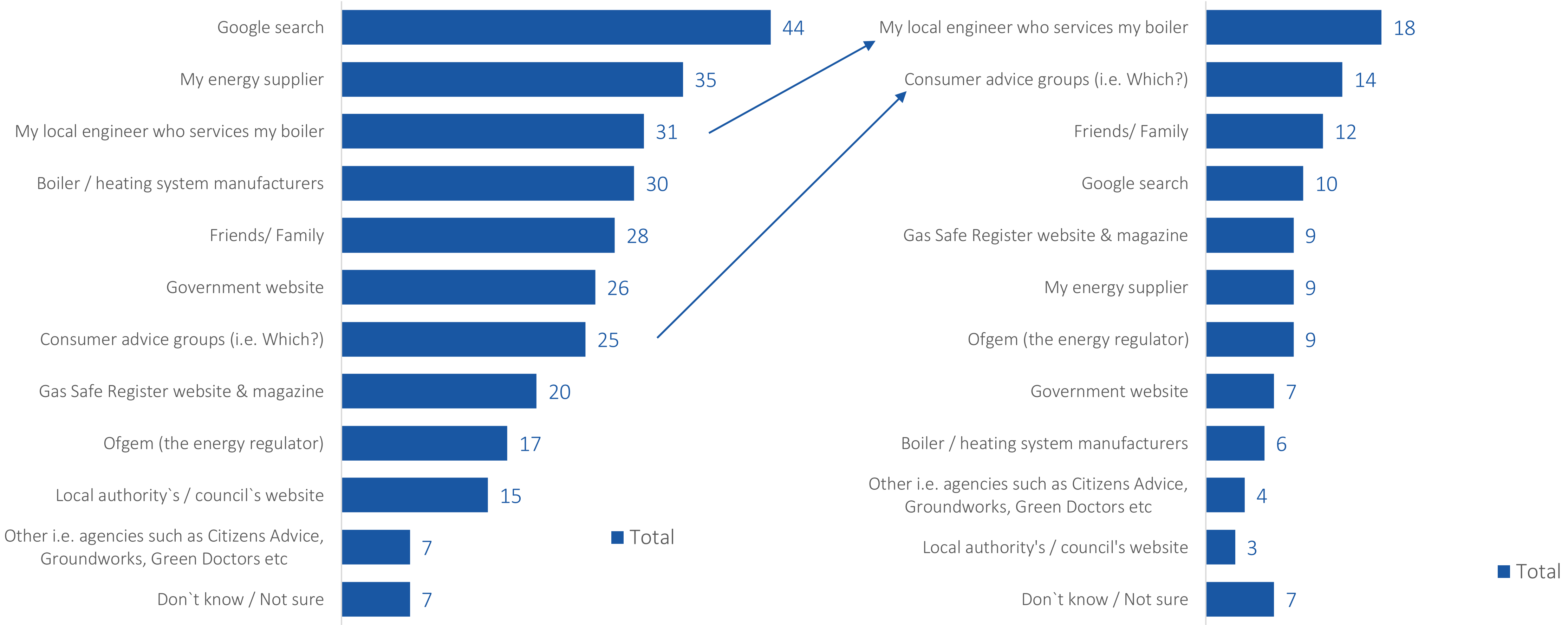
Heating system at home – Information source and trust

Internet search is the most popular source of information, followed by energy supplier. 3 in 10 also said they'd reach out to their local engineer. Local engineer is the most trusted source, followed by consumer advice groups. Younger customers were significantly more likely to trust friends/family.

New question(s)

Where to look for information about the options available

Where to look for information about the options available | **Who do you trust the most?**

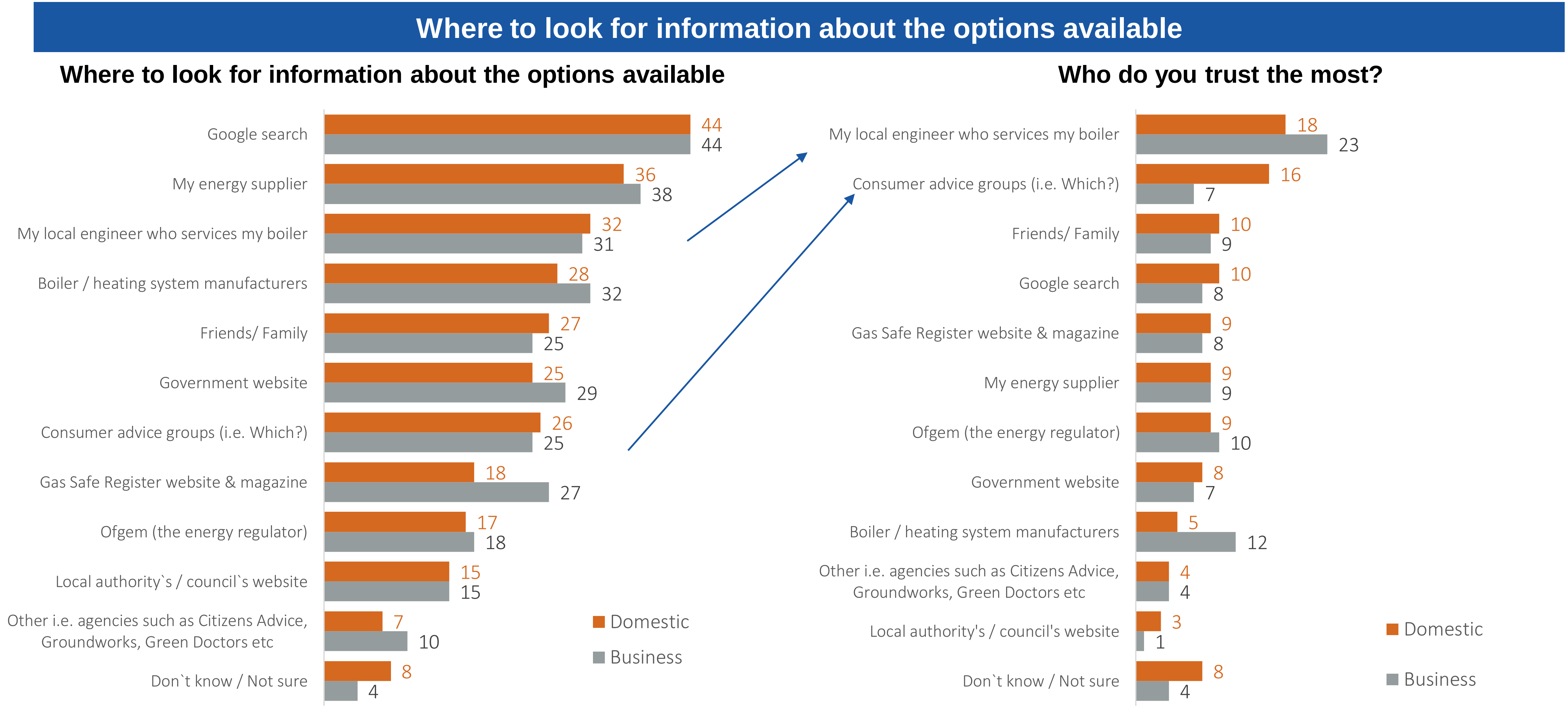


Q35e. If you had to install a new heating system, where would you look for information about the options available? Total: 692 Domestic: 561, Business: 131 Q35f. Who would you most trust to provide you with this information? Wave 4: 483, Domestic:386, Business 97 New question in wave 4

Heating system at home – Information source and trust – By Domestic and Business

Overall, not much differences can be seen between domestic and business participants. However, business customers were more likely to trust their regular engineer

New question(s)



Q35e. If you had to install a new heating system, where would you look for information about the options available? Total: 692 Domestic: 561, Business: 131 Q35f. Who would you most trust to provide you with this information? Wave 4: 483, Domestic:386, Business 97 New question in wave 4

Vulnerability & Recruitment

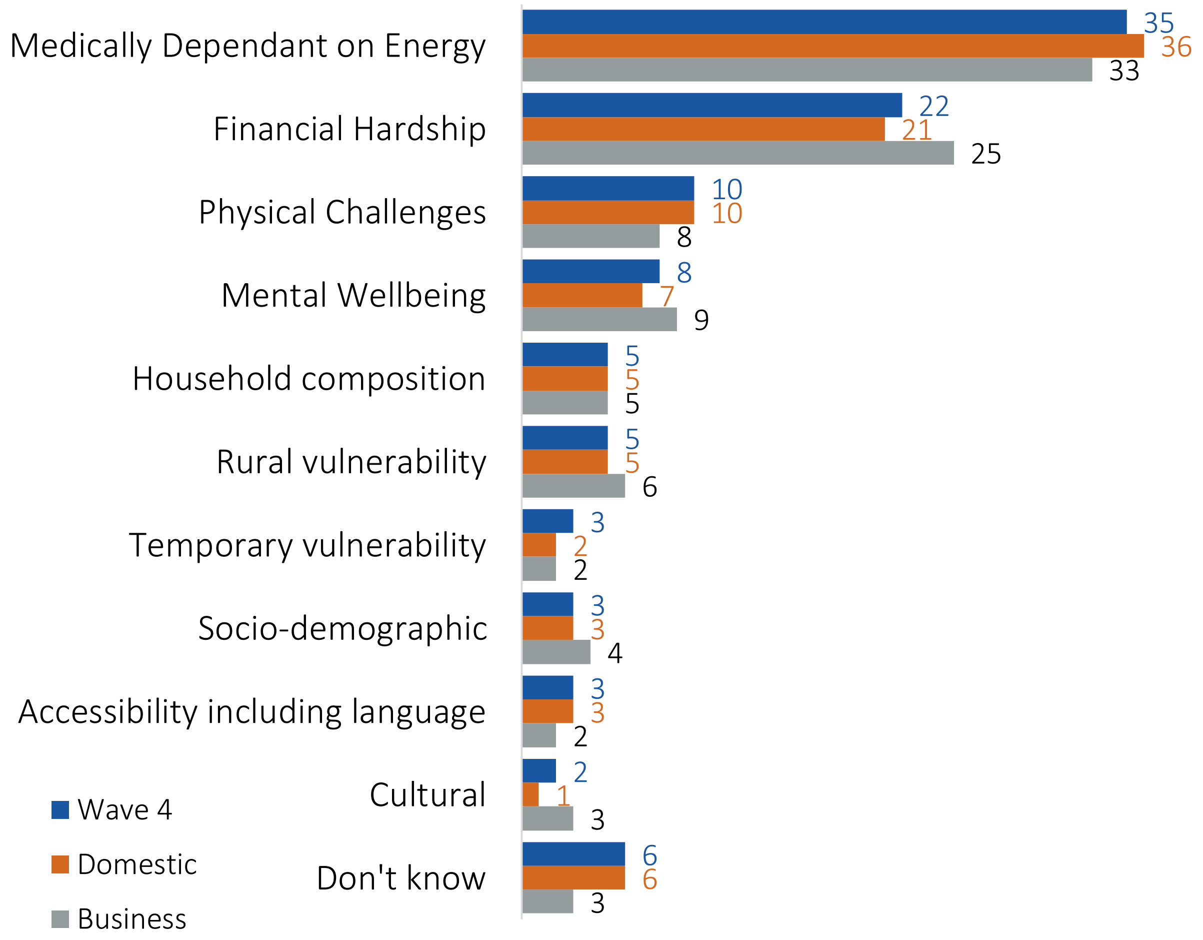
Accent

Vulnerability dimensions and initiatives

Medically dependent on Energy is voted most important aspect of vulnerability for NGN to focus on, with older customers gave this option significantly more weight.

New question(s)

Prioritising vulnerability dimensions and initiatives – Jan 24



Q38. NGN would like to know which of these categories of vulnerability are personally most important for you. Please rank them in order of importance, with the most important at the top. wave 4: 1,403, Domestic: 1,167, Business: 236. New question in wave 4

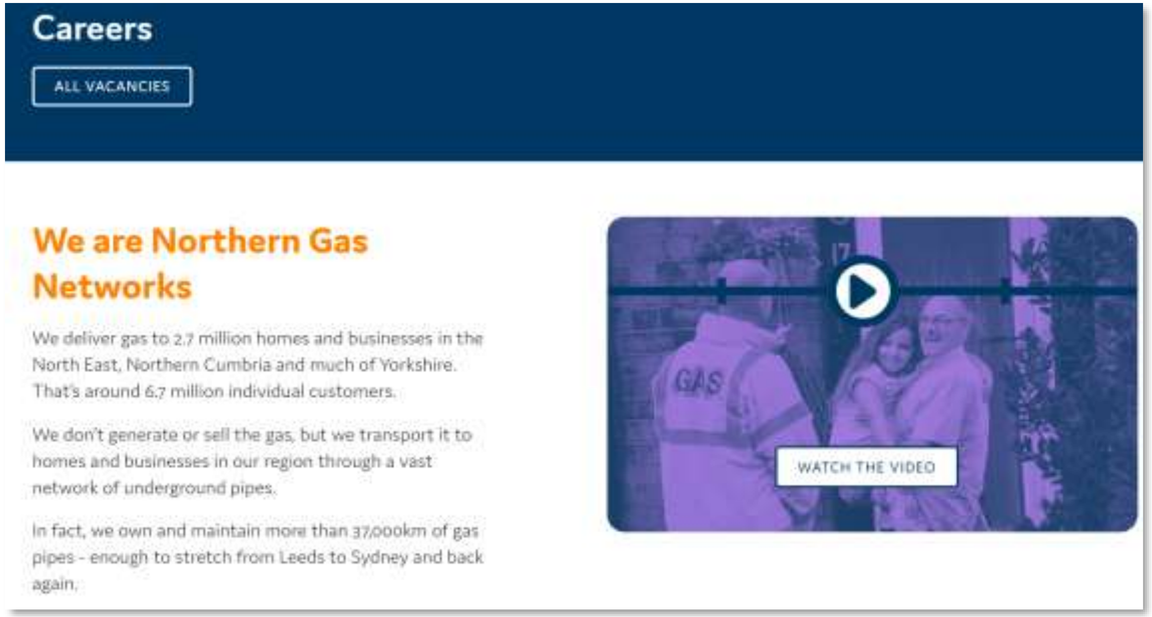
Accent

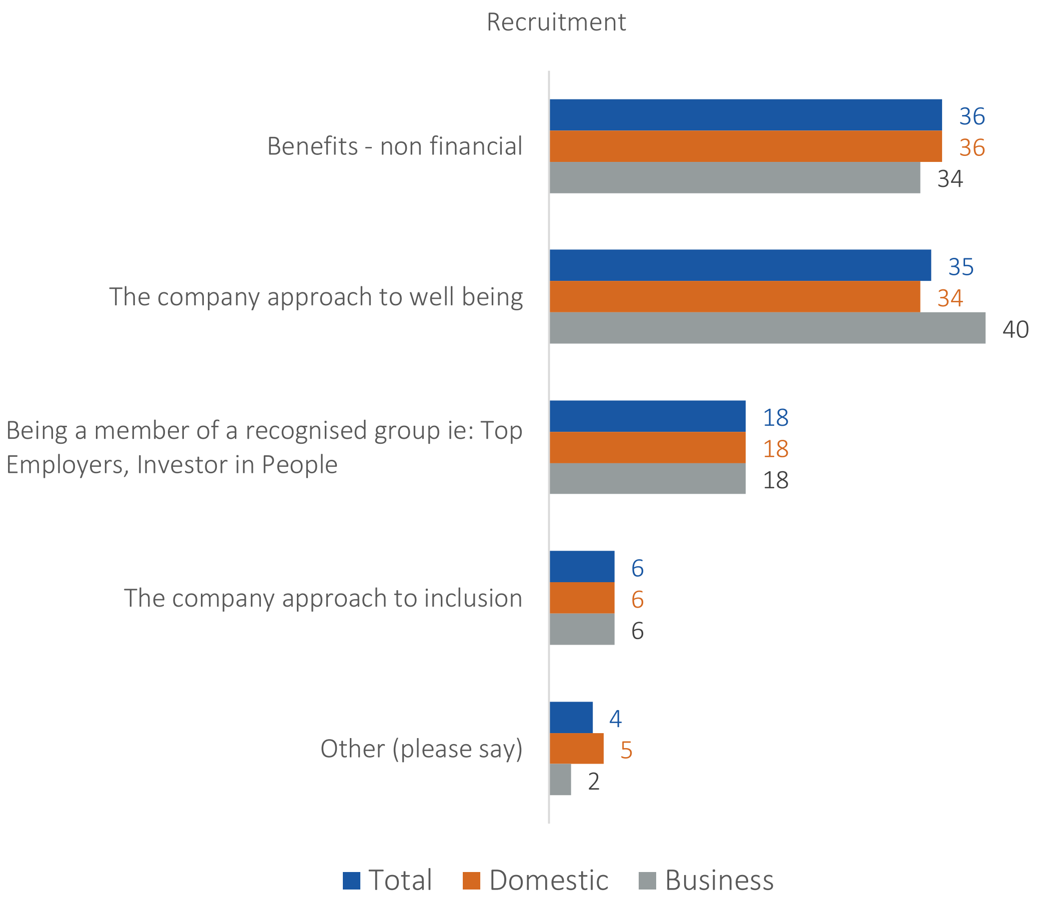
Recruitment

Recruitment should focus on non-financial benefits and NGN's approach to well-being as these were both top choices when participants were asked about "employer of choice".

New question(s)

Recruitment





Q45a. With "employer of choice" in mind, which of the following influence your decision the most, apart from salary and job description. wave 4: 1,403, Domestic: 1,167, Business: 236. New question in wave 4

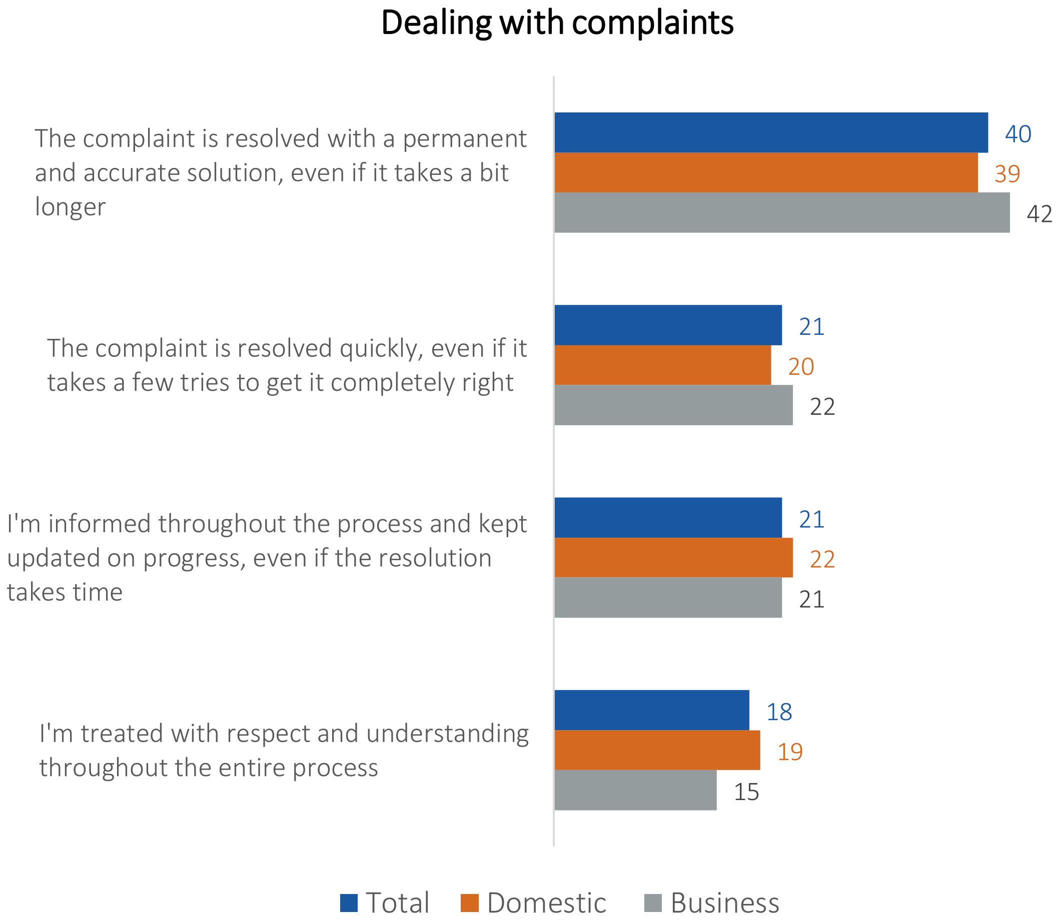
Accent

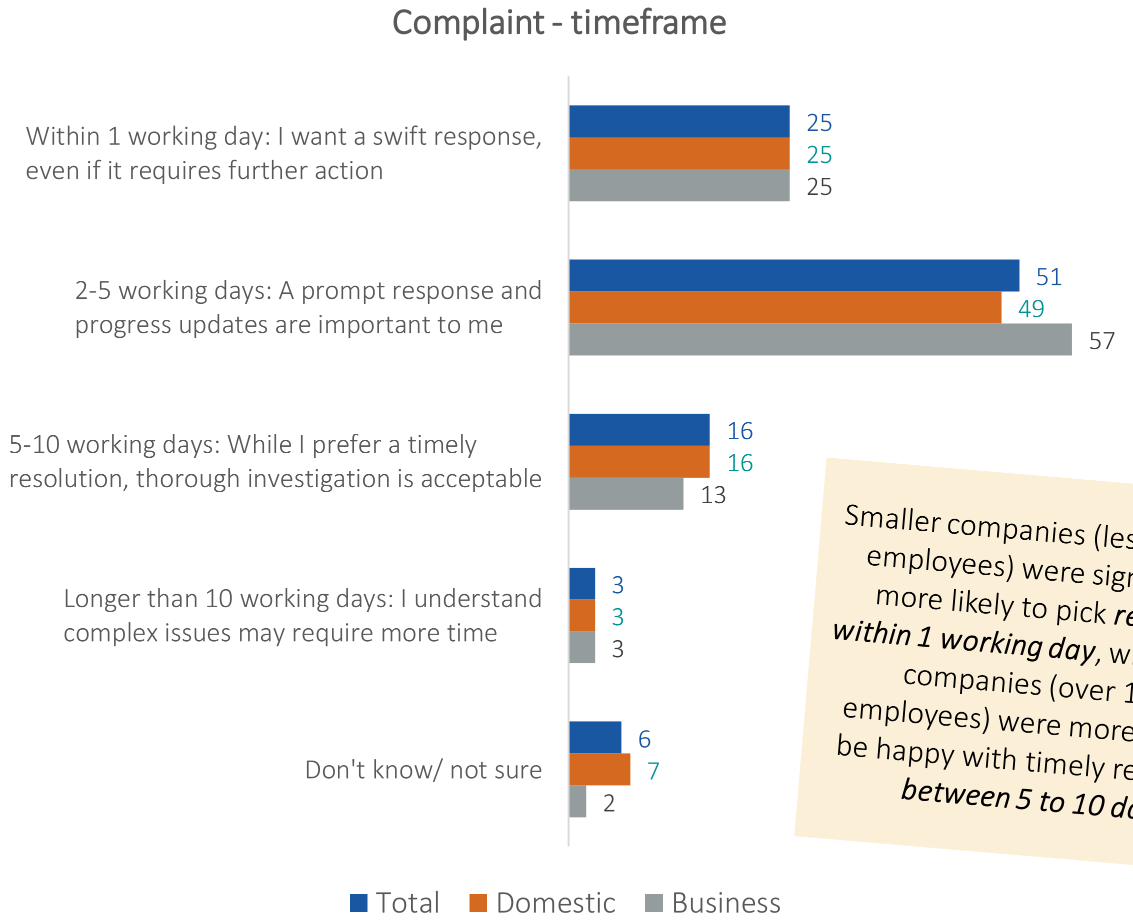
Complaints

Dealing with complaints

The majority of customers wanted a permanent resolution, even if it takes a bit longer. However, they'd like to be kept updated within the 2-5 days timeframe. Business sizes seemed to have an impact of the desire length to resolve complaint .

Complaints





Smaller companies (less than 100 employees) were significantly more likely to pick ***response within 1 working day***, while bigger companies (over 1000 employees) were more likely to be happy with timely resolution ***between 5 to 10 days***

Keeping your household safe

Frequency of safety maintenance depends on the type of maintenance activity. The cost of living crisis does not seem to have had a major impact on frequency of maintenance.

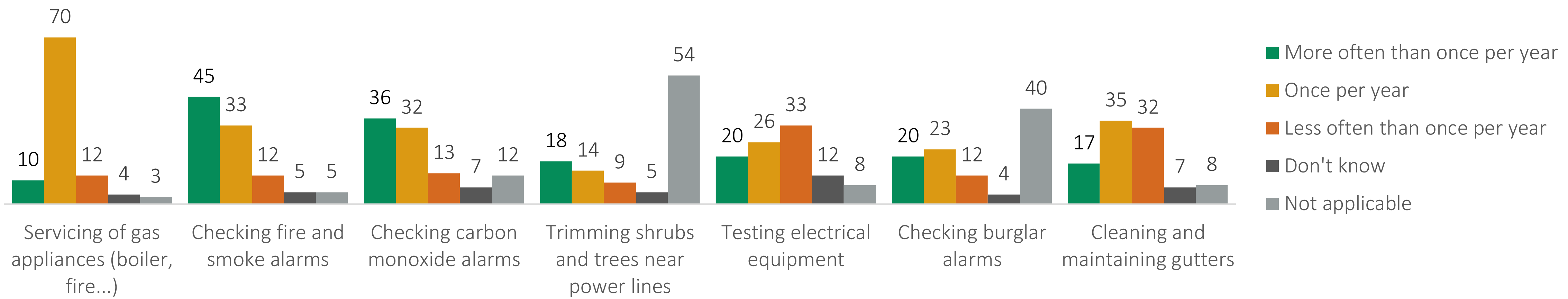
However, there is a need for strategies to address the disparity in gas safety maintenance practices based on various demographics.

Safety maintenance actions and impact of the cost-of-living crisis

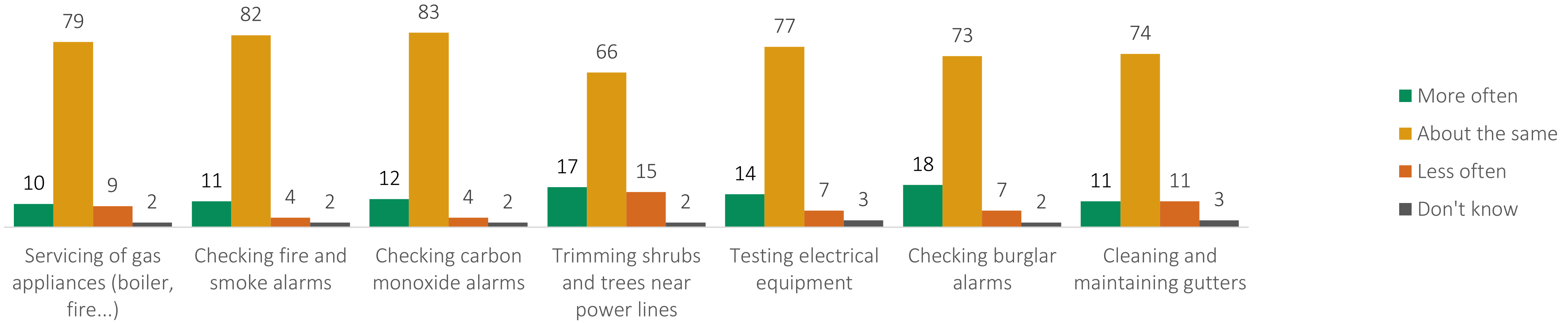
Frequency of carrying out maintenance actions remained similar to last wave, the cost of living crisis seemed to have little impact on the frequency of undertaking these actions.

New question(s)

Frequency of undertaking maintenance actions



Impact of the cost of living crisis



Q47r1. How often do you undertake the following maintenance actions, in order to keep you and your household safe?Q47ar4. What impact do you expect the cost-of-living crisis to have on how often you undertake the following maintenance actions? wave 4: 1,403, Domestic: 1,167, Business: 236. New options added in wave 4

New question(s)

Safety maintenance actions and impact of the cost-of-living crisis – in subgroups

Younger customers, those not on PSR and non-white are significantly more likely to carry out gas-related safety maintenance action less often than once a year, while older customers were less likely to be engaged in maintenance activities that are physically demanding.

Frequency of undertaking maintenance actions – less often than once a year

Servicing of gas appliances (boiler, fire...)	Checking fire and smoke alarms	Checking carbon monoxide alarms	Trimming shrubs and trees near power lines	Testing electrical equipment	Checking burglar alarms	Cleaning and maintaining gutters
Sig higher in: - 25-34 & C1, not on PSR, and non-white.	Sig higher in: - 18-24 & digitally disengaged, those on benefit	Sig higher in: Those not on PSR	Sig higher in: Under 34, ABC1, those digitally engaged, financially struggling, non white	Sig higher in: 75+, ABC1, not on PSR, have no difficulty paying bills, not on benefit.	Sig higher in: 18-24 & those not on PSR	Sig higher in: Those 35 to 74, digitally disengaged, not on PSR

These findings suggest a need for strategies to address the disparity in gas safety maintenance practices based on age, PSR status, and ethnicity. Tailored outreach and support programs could be beneficial for younger customers, those not on PSR, and specific ethnic groups. Additionally, exploring ways to make physically demanding tasks more accessible for older customers could improve their engagement in safety maintenance.

Q47r1. How often do you undertake the following maintenance actions, in order to keep you and your household safe?Q47ar4. What impact do you expect the cost-of-living crisis to have on how often you undertake the following maintenance actions? wave 4: 1,403, Domestic: 1,167, Business: 236. New options added in wave 4

Safety maintenance actions and impact of the cost-of-living crisis – in subgroups

Younger customers and financially struggling individuals were disproportionately less likely to maintain safety activities as frequently as before. This suggests they may require additional support to ensure consistent safety maintenance practices.

New question(s)

Impact of the cost of living crisis- Carry out safety activities less often						
Servicing of gas appliances (boiler, fire…)	Checking fire and smoke alarms	Checking carbon monoxide alarms	Trimming shrubs and trees near power lines	Testing electrical equipment	Checking burglar alarms	Cleaning and maintaining gutters
Sig higher in: - 25-34, not on PSR, struggle to pay bills.	Sig higher in: - 18-24, struggle financially,	Sig higher in: 25-34, male & non-white	Sig higher in: Under 34, C1, struggle to pay bills, struggle financially, on benefit	Sig higher in: Those struggle to pay bills & struggle financially	Sig higher in: 18-24	Sig higher in: 25-34, struggle to pay bills, struggle financially,

Q47r1. How often do you undertake the following maintenance actions, in order to keep you and your household safe?Q47ar4. What impact do you expect the cost-of-living crisis to have on how often you undertake the following maintenance actions? wave 4: 1,403, Domestic: 1,167, Business: 236. New options added in wave 4

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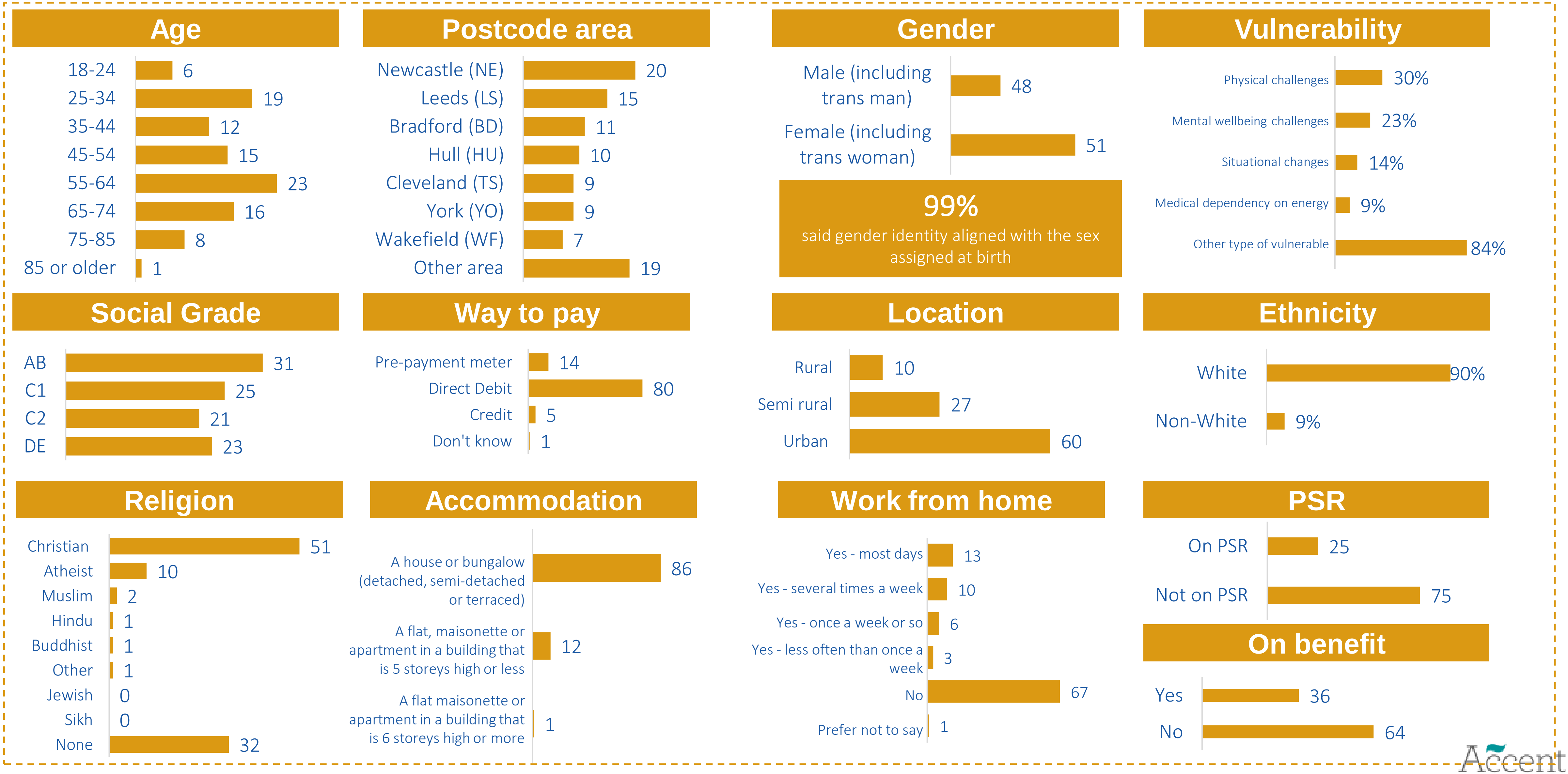
Appendix and demographics

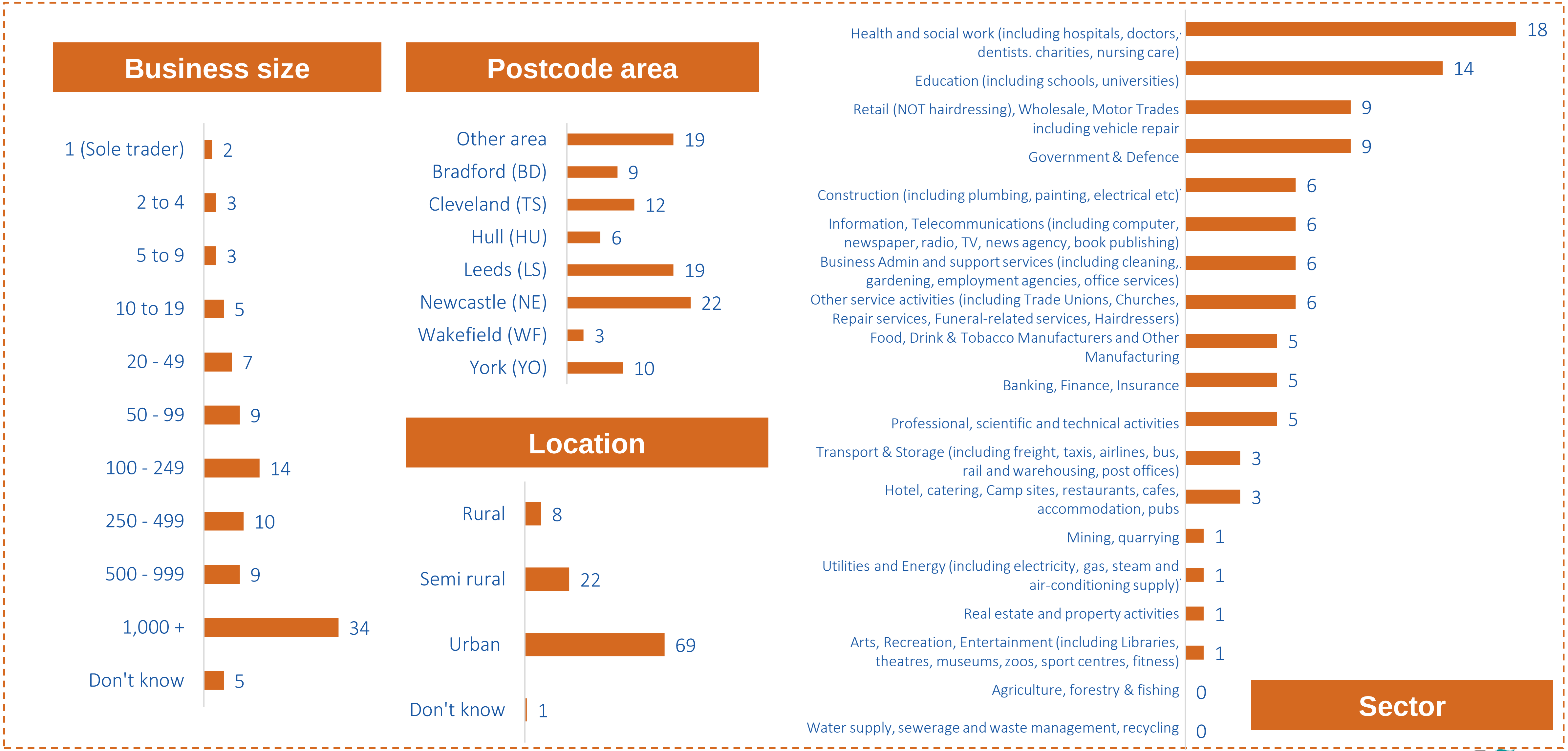
Domestic customer profile (n=1,167)

Weight target	Age		Social grade		Gender	
	16-34	30%	ABC1	56%	Male	49%
	35-64	47%	C2DE	44%	Female	51%
	65+	23%				



All charts show percentages. Percentages may not total 100 due to rounding.

Business customer profile (n=255)



All charts show percentages. Percentages may not total 100 due to rounding.

Thank you

Accent conforms to the requirements of ISO20252:2019

Accent

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Appendix

Tracking question(s)

Concerns with hydrogen in subgroups

in January 2024, 41% reported they would have some concerns with hydrogen being used in homes and business instead of natural gas. Overall, very little differences can be seen between subgroups. However, concerns are more noticeable among those who has physical challenges and those identify as white.

Hydrogen in transport & Concerns- Top 2 box

I would have some concerns with hydrogen being used in homes and businesses instead of natural gas

Age					SEG				Gender		Digitally disengaged		Urban/Rural			PSR	
18-24	25-34	35-54	55-74	75+	AB	C1	C2	DE	Male	Female	Digitally disengaged	Online	Rural	Semi-rural	Urban	On PSR	Not on PSR/Don't know
41	40	40	41	39	35	42	49	37	44	37	55	40	47	44	40	42	40

Bills			Financial hardship		Vulnerability					Way to pay			Ethnicity		On benefit	
Pay without difficulty	Struggle from time to time	Constant struggle / fall behind	Yes	No	Physical challenges	Mental wellbeing challenges	Situational changes	Medical dependency on energy	Other type of vulnerable	Pre-payment meter	Direct Debit	Credit	White	Non-White	Yes	No
39	43	46	44	39	49	41	35	31	40	44	41	41	43	24	45	40

Sig higher/lower than at least one attribute in the same category at 95% confidence levels

Q36r2-ar2. How much do you agree or disagree with the following statements? (Tracking question) (wave 2 = 1,124; Domestic 952, Business: 172, wave 3= 1,355, Domestic 1,100, Business 255, wave 4: 692, Domestic:561, Business 131)

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Vulnerability dimensions and initiatives – in subgroups

Medically dependent on Energy is voted most important aspect of vulnerability for NGN to focus on, mostly driven by those over 35s, those who pays using DD or credit, and those not on benefit.

New question(s)

Prioritising vulnerability dimensions and initiatives – Jan 24

		Age					SEG				Gender		Digitally disengaged	
	Total	18-24	25-34	35-54	55-74	75+	AB	C1	C2	DE	Male	Female	Digitally disengaged	Online
Medically Dependant on Energy	35	18	23	34	45	42	37	37	34	31	34	36	39	34
Financial Hardship	22	30	20	23	20	14	17	22	23	24	23	19	14	22
Physical Challenges	10	5	11	9	10	10	9	8	13	9	9	10	8	10
Mental Wellbeing	8	8	11	9	4	6	6	9	6	10	8	7	16	7
Household composition	5	5	10	3	4	7	7	4	1	10	4	7	5	5
Rural vulnerability	5	3	4	5	4	7	8	3	4	3	4	5	4	5
Temporary vulnerability	3	2	3	4	1	2	3	1	3	3	3	2	3	3
Socio-demographic	3	8	3	4	1	0	3	4	4	0	3	2	1	3
Accessibility including language	3	4	7	2	1	3	3	3	2	4	2	4	4	3
Cultural	2	7	5	1	0		2	2	4		2	2		2

	PSR		Bills			Financial hardship		Way to pay			Ethnicity		On benefit	
	On PSR	Not on PSR/Don't know	Pay without difficulty	Struggle from time to time	Constant struggle / fall behind	Yes	No	Pre-payment meter	Direct Debit	Credit	White	Non-White	Yes	No
Medically Dependant on Energy	36	35	37	33	29	32	37	22	36	37	36	26	29	36
Financial Hardship	19	22	21	23	24	24	21	20	23	17	22	16	26	20
Physical Challenges	12	9	8	11	13	12	8	13	9	8	9	13	12	9
Mental Wellbeing	9	7	6	9	10	9	6	10	8	6	7	12	10	7
Household composition	7	5	5	6	4	6	5	8	5	4	6	3	6	5
Rural vulnerability	3	5	5	4	5	4	5	4	5	2	5	4	4	5
Temporary vulnerability	2	3	2	2	2	2	2	4	2	6	3	3	4	2
Socio-demographic	2	3	3	3	3	3	3	2	3	2	3	6	1	4
Accessibility including language	4	3	3	2	4	3	3	6	2	9	2	11	4	2
Cultural	2	2	2	1	3	2	2	5	1	3	2	2	1	2

Sig higher/lower than at least one attribute in the same category at 95% confidence levels

Q38. NGN would like to know which of these categories of vulnerability are personally most important for you. Please rank them in order of importance, with the most important at the top. wave 4: 1,403, Domestic: 1,167, Business: 236. New question in wave 4

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Validation, Verification and Monitoring

Our research is subjected to rigorous quality control procedures to ensure accuracy and reliability.

Data Verification

- Thoroughly review all questionnaires for completion before analysis.
- Verify the accuracy of frequencies, data tabulations, and raw data.

CAPI Validation

- Validate 10% of face-to-face interviews through a combination of methods (telephone, online and SMS).

CATI Validation

- Listen in on 5% of telephone interviews to ensure quality.

Data Validation – All Quantitative Responses

- Subject all interviews to a computer edit with appropriate logic checks to enhance data accuracy.
- Subject all responses to a thorough 100% manual edit, conducted by trained coders.
- Utilise SPSS for a detailed analysis of standard questions.

Data Monitoring

- Conduct meticulous report edits to ensure data accuracy.
- Identify and rectify missing values.
- Apply forced edits for logical consistency and verify its effectiveness through subsequent data runs.
- Develop and present a comprehensive client-approved codeframe for open or 'other' questions

Tabulations and Data Outputs Verification

- Perform various checks, including accuracy of tables, abbreviations, base size, cross breaks, derived data, subgroups, net totals, weighting, frequencies, spelling, and statistical analysis.

Additional Information

The following information on Quantitative work is available upon request:

- The fieldwork method (e.g. in-person, telephone or online, individual or group interviews, synchronous or asynchronous),
- The target group and sample selection methods,
- Assessment of sample representation of target population and respective implications,
- The sampling method, including size of planned and achieved sample, reasons for differences in planned and achieved and how any problems in this respect were dealt with,
- Response rate where probability samples were used and its definition and calculation method,
- Participation rate where non-probability samples were used,
- The number of interviewers or moderators, if applicable,
- The fieldworker/moderator validation methods, if applicable,
- The questionnaires, any visual exhibits or show cards, and other relevant data collection documents,
- The weighting procedures, if applicable,
- Any methods statistical analysis used,
- The estimating and imputation procedures, if applicable,
- The results that are based on subgroups and the number of cases used in subgroup analysis,
- Variance and estimates of non-sampling errors or indicators thereof (when probability samples are used).