

# 3628 NGN Customer Perceptions and Priorities Research

Qualitative Report  
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Accent

# Qualitative Research Process

## Focus groups

- 8 pre-tasks 90-minute online focus groups (7x HH & 1x NHH) with 6-7 participants per group
  - Household Customers (7 groups) - incentivised with £65 payment
    - Participants with physical challenges
    - Rural Communities
    - Future Customers
    - Cultural/Ethnic Minority and Faith Groups
    - Multi-occupancy buildings
    - Participants with Financial Challenges
  - Non-Household Customers (1 group) – incentivised with £100 payment
    - Small/Micro & Medium Business Owners

## In-depth interviews

- 12 60-minute Zoom and telephone depth interviews (4 x HH & 8 x stakeholders)
  - Household Customers (4 telephone depth interviews) – incentivised with a £50 payment
    - Digitally excluded
  - Representative Stakeholders of the following customer segments (7 online depth interviews)
    - Participants with physical challenges – Mike Johnston of DIAL
    - Rural Communities – Graham Biggs MBE of Sparse
    - Future Customers - Tracey Wallace of Skills 4 Work Gateshead
    - Cultural/Ethnic Minority and Faith Groups - Sihle Mapanda of Two-Way Tenancy Solutions (Gateshead)
    - Multi-occupancy buildings - Hannah Greason of Gateshead Council
    - Participants with Financial Challenges - Carol Ashworth of Citizens Advice Northumberland
    - Small/Micro & Medium Business Owners - Barney Mynott of FSB

# Pre-task

- The pre-task was designed as an essential preparatory step for participants of the seven focus groups. Its primary purpose was to onboard participants, ensuring they were well-informed about Gas Distribution Networks (GDNs), Northern Gas Networks (NGN), and their respective activities before engaging in the focus group discussions.
- Components of the pre-task:
  - **Participant Introduction:**
    - Participants were asked to introduce themselves, sharing details such as their location, occupation, and household composition. This step was intended to foster a sense of familiarity between moderators and group members.
  - **Informative Session on NGN:**
    - Detailed information presented about NGN's functions, goals, and the services it offers to customers. We encouraged participants to ask questions for clarification on any aspects of NGN's operations that were unclear.
  - **Daily Gas Usage Tracking:**
    - Participants were requested to record their household's gas usage over a day. The aim was to gather insights into the practical aspects of gas consumption among different users and to get people thinking about their gas usage.
  - **Ranking NGN's Priorities:**
    - Participants were provided with a list of NGN's priorities and asked to rank their top 8 choices. They were also asked to explain their reasons for choosing their top two priorities, offering deeper insight into customer values and expectations.
  - **Ranking NGN's Challenges:**
    - A list of NGN's key challenges was presented for participants to rank in order of importance. This exercise aimed to understand customer perspectives on the challenges NGN faces and their expectations for how these should be addressed.
- The pre-task served as a foundational step for enriching the focus group discussions, ensuring participants were well-informed and engaged.
- The pre-task aimed to elicit more informed, nuanced discussions and feedback during the focus groups by familiarising participants with NGN and its activities. The pre-task activities, from introductions to ranking exercises, were designed to prompt participants to think critically about their relationship with NGN and their expectations for gas distribution services.

# Focus Group and Depth Interview Topics:

The discussions were structured to capture a wide range of perspectives from different participant groups, including current household customers, non-household customers, digitally excluded individuals, and key stakeholders.

**NGN Awareness and Knowledge:**

- Examining participants' prior awareness and understanding of NGN and its role in the gas distribution network.
- Insights into public knowledge about the gas supply process and NGN's responsibilities.

**Communication and Engagement:**

- Preferences for receiving information and communicating with NGN.
- Effectiveness of NGN's current communication strategies and opportunities for enhancement.
- Strategies for better engagement with stakeholders and the broader community.

**Energy Efficiency and Sustainability:**

- Attitudes toward energy efficiency and the transition to renewable energy sources.
- Expectations for NGN's contribution to promoting energy efficiency and facilitating the shift towards greener energy solutions.

Challenges and opportunities identified by stakeholders in the context of regulatory requirements, environmental sustainability, and evolving customer needs.



**Service Perceptions:**

- Evaluating views on the quality, reliability, and safety of NGN's gas supply.
- Experiences with NGN's customer service, including emergency responses and routine inquiries.

**Support for Vulnerable Customers:**

- Awareness and assessment of NGN's initiatives to support vulnerable customer groups.
- Suggestions for improving the accessibility and impact of these support services.

**Investment Priorities and Business Planning:**

- Perspectives on NGN's strategic planning and investment priorities, focusing on infrastructure, technology advancements, and customer service improvements.



## Key Findings



# Business Planning and Priorities

# Findings from the pre-task

	Ranked 1st	Ranked 2nd	Total
Providing in-depth support for customers in fuel poverty	14	2	16
Quicker restoration of gas supplies after unplanned interruptions	6	6	12
Having industry leading 1- and 2-hour emergency response to gas escapes	7	2	9
Enhancing a Hardship Fund and community projects	2	7	9
Reducing gas leaks from our network	1	3	4
Accelerating the reduction of NGN's carbon footprint	1	2	3
Expanding Carbon Monoxide awareness campaigns	1	2	3
Planting more trees for biodiversity and air quality	2	0	2
Collaborating with local authorities to develop net-zero local energy plans	2	0	2
Increasing Priority Services Register awareness and membership	0	2	2
Advocate for wider blending of green gases like hydrogen	1	1	2
Sustainable spending and investment	1	0	1
Quicker resolution of customer complaints	1	0	1
Quicker restoration of land after works	1	0	1
More efficient gas connection processes	1	0	1
Expanding paid volunteering days in local communities	1	0	1
Raise customer awareness and education on net zero	0	1	1
Achieve industry-leading customer satisfaction scores	0	1	1
Tackle gas theft for increased customer safety	0	1	1
Collaboration with regional utilities during severe weather incidents	0	1	1
Enhanced voluntary compensation for service standard failures	0	1	1
Upskilling the supply chain to become more sustainable	0	1	1
Increasing fair employment through apprenticeships	0	1	1

- The rankings reveal that providing support for customers in fuel poverty is the top priority, followed by quick restoration of gas supplies and industry-leading emergency response times. Enhancing community hardship funds, reducing gas leaks, and accelerating the reduction of the company's carbon footprint are also high on the list.
- Other important priorities include expanding carbon monoxide awareness campaigns, planting trees for biodiversity and air quality, collaborating with local authorities on net-zero energy plans, and increasing awareness of the Priority Services Register.
- The lower-ranked priorities cover a range of issues such as sustainable spending, efficient complaint resolution, land restoration, gas connection processes, paid volunteering, customer education on net zero, industry-leading customer satisfaction, tackling gas theft, collaboration during severe weather, enhanced compensation for service failures, upskilling the supply chain, and increasing fair employment through apprenticeships.
- Overall, the rankings emphasise a focus on customer support, safety, reliability, sustainability, and community engagement.

# Customer perceptions on NGN's part of their bill

- Most participants were surprised that NGN's services came out of their own bill
- A few participants remarked that they believe NGN should be getting a bigger share of the bill
- Customers were confused by the question "would you pay more for a better service" as they do not know what a better service would look like from their perspective.
- Customers who thought NGN should be getting more from the bill were not, however, willing to pay more



*"For me, I was surprised at how low a proportion of my gas bill goes to maintaining the network" Rural Customer*

*"I'd say we're already paying so now we're not getting a very good service so it's like if you want better, you have to pay more. I feel like we should be getting the service already." Customer with Physical Challenges*

*it's a modest fee compared to what we're paying in bills, isn't it? Business Owner*



# Customer priorities

- The cost of energy dominated every discussion with customer segments and stakeholders. For most participants, any other priority was peripheral.
- Many customers recognised a change in their priorities as the impact of the cost-of-living crisis increases. They have begun deprioritising greener energy and carbon-neutral aspirations as they are concerned about costs.
- Safety and reliability of gas supply are seen as core priorities for NGN across all customer segments. For many participants, NGN should not be focusing on anything other than these elements.
- Providing support for those in need, particularly during the cost of living crisis, is highly valued by customers across segments. Fuel poverty was a concern among all customer segment groups.

Future customers (aged 18-25) place higher importance on environmental concerns compared to other segments.

Business owners prioritise minimising disruption to their operations and swiftly restoring the gas supply in case of interruptions.

# Stakeholder Findings

Affordability and support for those in fuel poverty are key priorities, especially given the cost-of-living crisis.

Environmental concerns and net-zero targets are important but often overshadowed by immediate financial struggles for vulnerable customers.

A "one size fits all" solution does not work for rural communities; the way to achieve objectives and associated costs may differ significantly from urban areas.

Prepayment meters and standing charges pose significant challenges for vulnerable residents, often leading to disconnection and inability to access essential services.



# Engagement and Communication

# Preferred communication channels across segments

## Opportunity to communicate

Most participants agree that there is an opportunity for NGN to communicate their role, services, and support for vulnerable customers through various channels, including information with bills, local TV (especially for older customers), targeted social media campaigns, and leaflets.

## Report gas leaks via phone

For reporting gas leaks, customers prefer to contact NGN by phone for reassurance and information. As a participant from the notes explained, *"Report a gas leak needs to be by phone for most: can be a concern and they need to talk to a real person for reassurance and information, especially as this is a fairly unusual occurrence for most people."*

However, most customers said they would call their energy retailer in the first instance.

## Communication options

Participants emphasised the importance of providing communication options to cater to different needs, such as those with disabilities or language barriers. A participant from the physical challenges group suggested, *"Maybe getting a stall in a community hub or a job centre because a lot of people with, not English their first language and with specific vulnerabilities do come under the job centre."*

## The human-touch

There was very little consensus, both across customer segments and within customer segments, about preferred methods of communication with NGN. There was however consensus that dealing with human customer service agents as quickly as possible was the preference. Whether this requires them to be put on hold, called back, or dealt with via digital communication channels.

# Segment-specific communication needs and challenges

**Digitally excluded customers** may rely more on traditional communication methods like phone calls and letters. A participant from the rural communities group mentioned, "I'm a bit old-fashioned. I quite prefer a letter with my old gas bill and stuff like that. I think you've got to do it every way."

However, several people, even those who stated a preference for written communication in the form of letters or leaflets, suggested that they often throw away these without reading them.

**Business owners** value timely and transparent communication about service interruptions to plan accordingly.

**Future customers** were split on newer forms of digital communications such as chatbots, WhatsApp, and live chat functions. About half the group liked these forms of communication, and half did not. Introducing WhatsApp into the communication offering will please some, but not all, future customers.



# Energy Efficiency and Future Energy

# Energy Efficiency and Future Energy Perceptions

- Cost-saving motivations rather than environmental concerns primarily drive participants' understanding of energy efficiency.
- Awareness of net-zero targets is mixed, with many participants expressing scepticism about the feasibility of achieving these goals due to lack of infrastructure and high costs.
- Awareness of alternative energy sources like heat pumps and hydrogen is limited among participants.
- Participants are primarily focused on short-term financial concerns rather than long-term energy transitions.
- Regarding energy transition campaigns and educational support, the only support that customers care about is financial. Transitioning to an alternative energy source was considered financially unviable by nearly every participant.

**Business owners** express concerns about the practical implications and costs of transitioning to alternative energy sources.

**Rural communities** may face additional challenges in accessing and adopting low-carbon energy solutions due to infrastructure limitations. Rural customers are more likely to have older houses less conducive to alternative energy sources

**Future customers** are the group with the most favourable perceptions about alternative energy sources and energy efficiency. However, even for this group, cost is still paramount

## Stakeholder Opinions – Engagement and Communication

Engaging with individuals with physical challenges requires building trust, spending time with them, and understanding their unique needs.

Face-to-face engagement is crucial for rural communities, particularly older generations who may be suspicious of cold calls or online communication.

Engaging with disengaged young people requires one-to-one support from trusted sources.

Hard-to-reach communities, particularly refugees and those facing language barriers can be accessed through well-established organisations and community leaders.

Small businesses can be difficult to engage with due to time constraints and the need to prioritise immediate business concerns.



# Energy Transition and Education – Stakeholder Opinions

## 1. Confidence in energy topics/technologies

- Small businesses are beginning to understand the need to take action on energy issues, but many still lack confidence and knowledge about what they can do, especially if they don't own their premises.
- Unexpected energy-related issues are often seen as low-risk by small businesses, leading them to be unprepared when such issues occur.
- Some customers, particularly in rural communities, express uncertainty about who to trust when it comes to energy topics that are beyond their understanding.

## 2. Communication channels

- Social media can be effective, but the choice of platform depends on the target audience (e.g., LinkedIn for B2B, Facebook for B2C).
- Engaging with customers through frontline staff, such as GP services or social link workers, could help reach harder-to-reach individuals, although these staff members are already stretched and may not be energy poverty experts.

## 3. Delivering the message

- Working with trusted partners and supply chains is seen as an opportunity for NGN to effectively communicate with customers.
- Organisations that work directly with clients on the ground, such as charities and advice services, are well-positioned to disseminate information and surveys on behalf of NGN.
- Local councils and impartial advice and guidance charities are generally trusted by the public.

## 4. In-depth support for practical changes

- Vulnerable residents who may be disconnected or lack internet access rely on telephone support during emergencies or gas leaks.
- Target audiences for campaigns
- Campaigns may face some unpopularity due to inconvenience and costs, but influencing a broad range of stakeholders is necessary.
- Targeting vulnerable groups, such as young disabled people in supported living, is important.
- Campaigns should also focus on larger companies and stakeholders who can support those in fuel poverty, as those struggling with fuel poverty often have to prioritise day-to-day issues.

In summary, NGN should focus on increasing customer confidence in energy topics, work with trusted partners to deliver messages, provide accessible support for vulnerable residents, and target a wide range of stakeholders while prioritising vulnerable groups and those who can support them.



# Service Standards and Interruption Experiences

# Customer expectations for service standards and interruption management

- Participants generally did not care about service standards and interruptions, as these were so infrequent/unlikely to happen to them in the short or medium term that it is simply not a priority for most customers.
- Participants generally find current standards and service interruption policies acceptable, emphasising the importance of swift restoration of gas supply.
- Customers expect prioritisation and quicker response times for vulnerable customers and those on the Priority Services Register (PSR).
- While participants value swift restoration of gas supply, nearly all customers are unwilling to pay more for improved service standards, as they consider it a core responsibility of NGN.

- The business owners were the only customers that were interested in the service levels, albeit minimal.

- Business owners emphasise the need for minimising disruption to their operations and swift restoration of gas supply to avoid financial losses.

- Future customers were the most sceptical customer segment, believing that the 'above and beyond' compensation timelines are calculated so that interruptions are rarely paid out.

# Stakeholder Opinions on Service Standards and Interruption Experiences

Customers find current standards and service interruption policies acceptable but emphasise the importance of swift restoration of gas supply, especially for vulnerable customers.

For reporting gas leaks, customers prefer to contact NGN by phone for reassurance and information. Updates via WhatsApp or SMS would be appreciated.

Small businesses are unlikely to pay more for improved interruption standards, as major incidents are rare (less than once per 40 years on average).



# Support and Service Needs

# Customer views on support and service needs

- Not all are aware of the Priority Services Register, but when explained, they see this as very important and welcome proactivity here.
- Participants across segments emphasise the need for financial support and assistance during the cost-of-living crisis.
- Participants suggest that NGN could work with local organisations, community groups, and job centres to reach out to vulnerable and underserved customers.
- Many customers admitted to using less gas than they previously did, as they've swapped using the oven for an air fryer

Customers with physical challenges or disabilities may require additional support and consideration during service interruptions.

These customers also sometimes have additional gas usage requirements, such as more frequent bathing, related to their physical challenges.

Rural communities also typically have older homes, which are harder to heat and require more gas use.

Older customers are becoming more isolated as the cost-of-living crisis becomes more acute. The knock-on effect is that they spend more time at home, increasing their gas usage.



## Recommendations from stakeholders

# Recommendations from Mike Johnston of DIAL - Individuals with physical challenges

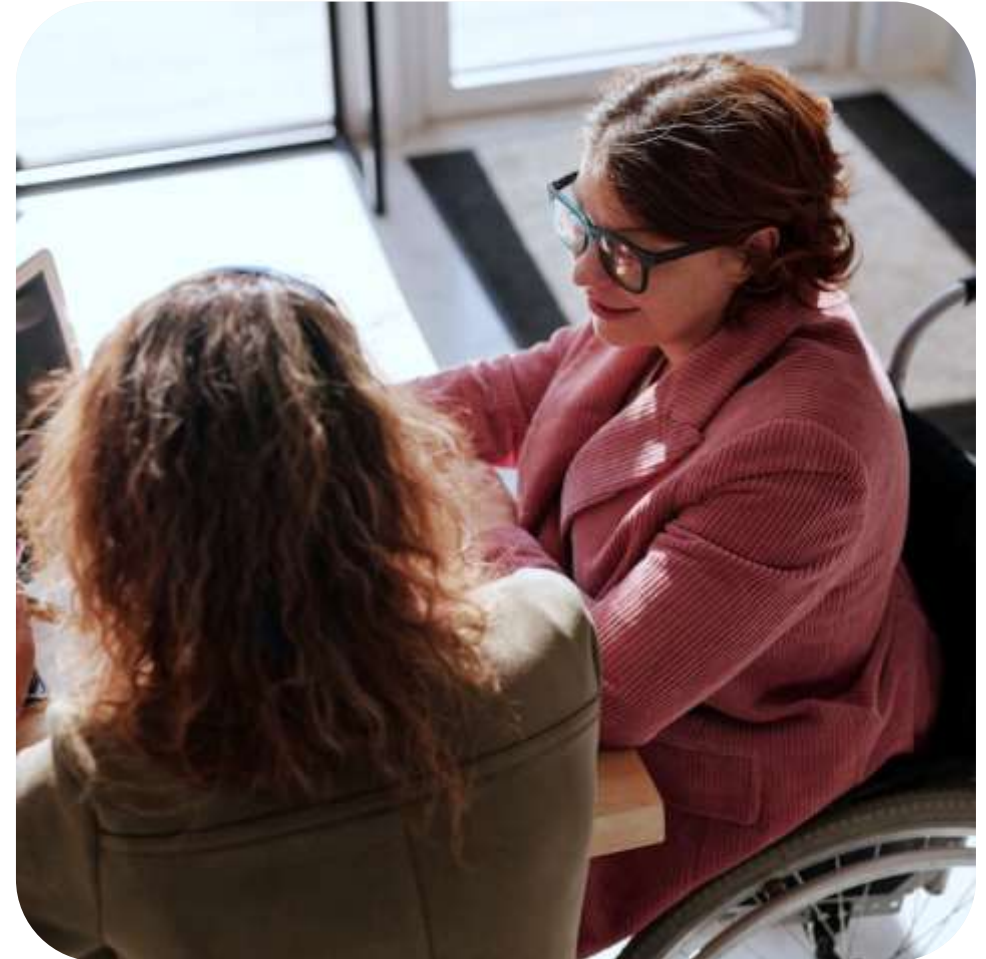
Partner with local disability organisations and charities to reach individuals with physical challenges, leveraging their expertise and established trust within the community.

Provide training for NGN staff and volunteers on effective communication and information gathering techniques when engaging with disabled individuals, focusing on building trust and understanding their unique needs.

Offer targeted financial support and incentives to help individuals with physical challenges adopt energy efficiency measures and transition to new energy sources, recognising the additional costs and challenges they may face.

Collaborate with disability organisations to develop accessible and inclusive communication materials, ensuring that information about energy efficiency, support schemes, and NGN's services is easily understandable and available in various formats.

Conduct outreach activities in partnership with local disability groups, such as workshops, information sessions, and one-on-one support, to provide personalised advice and assistance to individuals with physical challenges.





# Recommendations from Graham Biggs MBE of Sparse - Rural communities



Understand that rurality compounds other challenges, such as physical challenges, mental wellbeing, and medical dependency. Cost of living is higher in rural areas compared with urban areas.

Collaborate with rural organisations, such as SPARSE and Rural England Community Interest Company, to better understand the unique challenges faced by rural communities and develop tailored solutions and support mechanisms.

Establish partnerships with trusted local organisations to deliver energy efficiency advice and support, ensuring that the information is accessible and relevant to rural residents.

Develop targeted engagement strategies for rural communities, focusing on face-to-face interactions and attending local events where people naturally gather. E.g. agricultural shows and festivals. Face-to-face engagement is crucial for these communities.

Implement pilot projects in rural areas to demonstrate the feasibility and benefits of new energy technologies, involving local energy champions to share their experiences and build trust within the community, so people can see their neighbours using the technologies.

# Recommendations from Hanna Greason of Gateshead Council - Residents of Tower Blocks

Hannah suggested that NGN should work with trusted partners, such as charities, advice services, and local authorities, to effectively reach and support residents in tower blocks.

Providing clear, accessible information and raising awareness about energy efficiency, support schemes, and alternatives to traditional gas heating is crucial for engaging residents in tower blocks. Hannah emphasised the need for education and advertising to help people understand their options and make informed decisions.

Fund and partner with trusted advice services and charities to provide tailored energy efficiency advice and support to residents in tower blocks, leveraging their existing relationships and expertise.

Work with policymakers and industry stakeholders to address the challenges faced by residents on prepayment meters, such as standing charges and access to essential safety services.

Develop targeted communication and engagement strategies for residents in tower blocks, focusing on clear, accessible information about energy efficiency, support schemes, and alternatives to traditional gas heating.

Provide training and resources to frontline staff and volunteers who work directly with residents in tower blocks, equipping them with the knowledge and skills to offer initial advice and signposting to relevant services.



# Recommendations from Tracey Wallace of Skills 4 Work - Future Customers (Aged 18-25)



Collaborate with local charities and organisations that work directly with disengaged young people and families to raise awareness of the PSR and provide support in registering for the service.

Allocate funding to trusted partners like Skills 4 Work to enable them to dedicate staff resources to educating and assisting their client groups with energy-related matters, such as the PSR and carbon monoxide awareness.

Develop targeted, one-on-one engagement strategies for disengaged young people and families, working with trusted partners to deliver accessible and relevant information.

Provide direct support in registering individuals for the PSR, recognising that many may not have the skills or motivation to complete the process independently.

# Recommendations from Carol Ashworth of Citizens Advice Northumberland - Individuals Facing Financial Challenges

Carol suggested that NGN could reach individuals facing financial challenges through community settings and word of mouth, particularly in rural areas. She emphasised the importance of working with existing community groups and partners who are already engaged with vulnerable populations.

Providing accessible and meaningful information is crucial for this customer group around green technologies as these are a long way from people's minds presently.

Building trust and understanding the multiple facets of vulnerability is essential when engaging with this customer segment. Carol highlighted the importance of NGN staff delivering the message rather than relying on third-party suppliers or overseas call centres, which can erode trust.

Collaborate with local organisations, charities, and community groups to reach individuals facing financial challenges and build trust within these communities.

Provide accessible and meaningful information about energy efficiency, support schemes, and the role of NGN in a way that resonates with this customer group's immediate concerns and experiences.

Ensure that NGN staff are directly involved in delivering support and communications to maintain trust and build relationships with vulnerable customers.

Work with partners like Citizens Advice to identify and reach out to individuals facing financial challenges, leveraging their existing networks and expertise.

Ensure that NGN staff Develop targeted communication strategies that focus on the immediate benefits of energy efficiency and support schemes, such as cost savings and improved comfort, rather than emphasising long-term environmental goals.



# Recommendations from Sihle Mapanda of Two-Way Tenancy Solutions - Individuals from cultural, faith, and ethnic groups



Sihle suggested that NGN should engage with well-established organisations and community leaders who have existing relationships with hard-to-reach communities, particularly refugees and those facing language barriers.

Providing resources and support to organisations like 2Way Tenancy Solutions could help increase awareness and membership of the Priority Services Register among vulnerable client groups.

Partner with local organisations and charities that work directly with hard-to-reach communities, providing them with resources and support to help vulnerable individuals access essential services and register for the Priority Services Register.

Collaborate with landlords, housing associations, and local authorities to address issues related to property condition, energy efficiency, and access to affordable heating solutions for vulnerable tenants.

Develop targeted, face-to-face engagement strategies for hard-to-reach communities, working with trusted partners and community leaders to build relationships and provide support.

Provide clear, accessible information about energy efficiency, grants, and support schemes to landlords and housing providers, encouraging them to make necessary improvements to properties occupied by vulnerable tenants.

# Recommendations from *Barney Mynott of the Federation of Small Businesses*

## Small Business Owners

Barney suggested working with trusted partners and organisations that already have established relationships with small businesses, such as chambers of commerce, local business groups, and sector-specific associations.

Providing practical, actionable information and support is crucial for engaging small businesses in energy efficiency and sustainability initiatives.

Lead by example on sustainability in a relatable way to inspire small businesses. Use case studies of ordinary small businesses, not unattainable exemplars.

Improve direct communication around planned gas works. A letter may tick the box, but in-person explanation of timelines and support is better.

Accept that small businesses are unlikely to pay more for improved interruption standards, as major incidents are so rare (<once per 40 years on average).



# Summary of Recommendations

Increase awareness of NGN's role and services through targeted communication campaigns, leveraging bill inserts, local TV, social media, and community outreach channels.

Prioritise support for vulnerable customers and those in fuel poverty, working closely with local organisations and job centres to identify and assist those in need.

Enhance accessibility and inclusivity of communication by offering multiple channels, clear information, and language support to cater to diverse customer needs.

Collaborate with trusted partners and independent sources to provide energy efficiency advice and support, focusing on cost-saving benefits to engage customers effectively.

Ensure transparency and timely communication about service interruptions, prioritising swift restoration of gas supply, especially for vulnerable customers and businesses.

Tailor engagement strategies for each customer segment, considering their specific needs, preferences, and challenges, such as age, financial situation, and geographical location.

Work with local organisations, community leaders, and stakeholders to build trust and improve outreach to underserved customer groups.

# Key insights and recommendations

Awareness of NGN is generally low among customers, with most only recognising the logo on vans or associating them with gas-related work

Safety and reliability of gas supply are seen as core priorities for NGN, while providing support for those in need, especially during the cost-of-living crisis, is also highly valued by customers.

Environmental concerns are important to some, particularly younger customers, but are often overshadowed by immediate financial pressures

Customers would like NGN to communicate more about their role, services, and how they support vulnerable customers. Preferred channels include information on bills, local TV, and targeted social media campaigns

For reporting gas leaks, customers prefer to contact NGN by phone for reassurance and information. Updates via WhatsApp or SMS would be appreciated

Energy efficiency is primarily driven by cost-saving rather than environmental motivations. Customers are sceptical about NGN's role in providing advice but may be open to partnerships with trusted sources

Awareness of alternative energy sources like heat pumps and hydrogen is limited, and customers are focused on short-term financial concerns rather than long-term energy transitions

Customers find current standards and service interruption policies acceptable but emphasise the importance of swift restoration of gas supply, especially for vulnerable customers



# Thank you

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