



Northern Gas Networks

Customer perception research

WAVE

5



LEADERS IN STAKEHOLDER ENGAGEMENT



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Background and Objectives

1

Business Need

As Northern Gas Networks (NGN) enters the final year of its current business cycle and prepares for RIIO-GD3, it is essential to continuously monitor stakeholder perceptions and priorities, particularly in response to the evolving operating environment. These insights will guide strategic planning and the effective implementation of the RIIO-GD3 plan.

Throughout RIIO-GD2, NGN tracked customer priorities and perceptions. To better understand the impact of external events and market changes on stakeholder sentiment, NGN has partnered with Create Clarity Consulting to conduct ongoing research. This wave of fieldwork was conducted in January 2025. Previous results, where available, are included for context.

Objectives of the Research

This primary quantitative market research aims to:

- Track customer priorities and perceptions over time
- Identify and address knowledge gaps.



What we covered



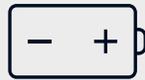
Awareness and perception of NGN



Customer priorities



Sustainability commitments



Energy use / future energy



Vulnerability support



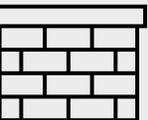
Innovation



Safety maintenance



EDI responsibility



Resilience

Research methodology

1

★ Extra content added post debrief

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

- Online panel (n=1,324)
- Face-to-face interviewing at customer's doorstep (n=100) to capture the views of those digitally disengaged (typically underrepresented on customer 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, Jan 25 Wave 5.
- In addition, selected questions asked of the Young Innovation Council, data included for context

NGN demographic classification



DIGITALLY DISENGAGED: 8% 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. Digitally disengaged customers are more likely to be: retired, on a state pension, DE social grade, 70+, have a vulnerability, especially medical dependency or physical challenge ★



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



FUTURE CUSTOMERS: 6% of the domestic customers interviewed were future customers, aged between 16-29, and not a current bill payer. This is supported by feedback from the Young Innovation Council.



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

1424
customers
total

1224
domestic

200
business



1

Cost of Living Impact: The cost-of-living crisis significantly impacts customers, with many struggling to pay bills (half of all domestic customers) and self-rationing energy (60%). Affordability remains a top priority, with reliability and safety also core expectations.

2

Priorities Customers prioritise affordable energy, safety, and reliability. Customers believe their priorities will shift over the next five years due to economic pressures and environmental concerns.

3

Energy Transition Challenges: Customers recognise the need for energy transition but have limited knowledge of low-carbon options and mixed perceptions of technologies like heat pumps. Clear and accessible communication, is essential. There's also a tension between affordability and Net Zero goals.

4

Balancing Resilience & Future Investments: Most customers (60% domestic, 46% business) support a balanced approach between maintaining current resilience and future-proofing. Businesses are more open to proactive /anticipatory investment for long-term resilience.

5

Awareness and Trust: Awareness of NGN is growing, particularly among businesses. Customers seek trust, transparency, and fairness in decision-making. Trust is driven by on-site visibility as well as a perception of caring.

Our recommendations

1

1

Enhance Transparent Communication: Emphasize NGN's commitment to customers, fairness in decision-making, and transparency in business performance to help build trust. Utilise various platforms, including social media, to deliver clear and honest messages

2

Prioritise Support: Continue to focus on keeping bills low and expand support for vulnerable customers, especially those medically dependent, with financial challenges and those with physical health conditions. Promote energy efficiency and affordable energy solutions

3

Educate on Energy Transition: Increase public awareness and understanding of low-carbon energy options from a trusted source, addressing concerns and promoting balanced consideration of technologies like heat pumps. Provide clear information on the transition away from natural gas.

4

Improve Emergency and Support Service Accessibility: Ensure emergency updates and support services, such as the Priority Services Register (PSR), are easily shareable and accessible to all customers, especially digitally disengaged individuals.

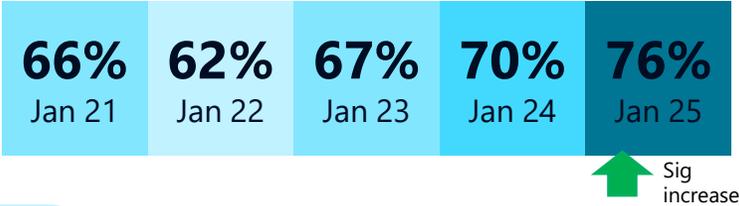
5

Balance Current Resilience and Future-Proofing: While financial constraints are a factor for many domestic customers, NGN should work to balance current resilience and future proofing the network. Emphasising the long-term benefits of investment in future-proofing will be important with all customers, and especially business customers.

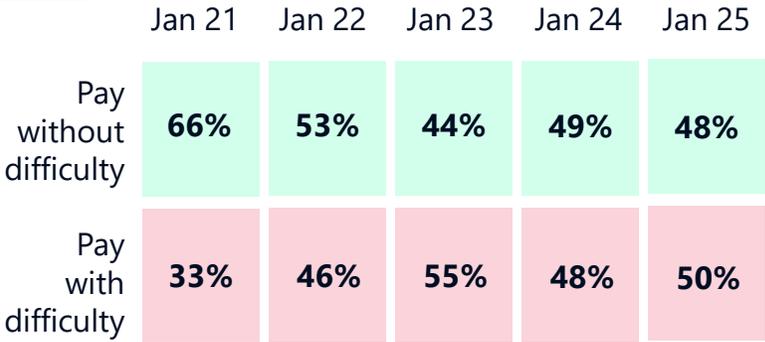
Key summary

1

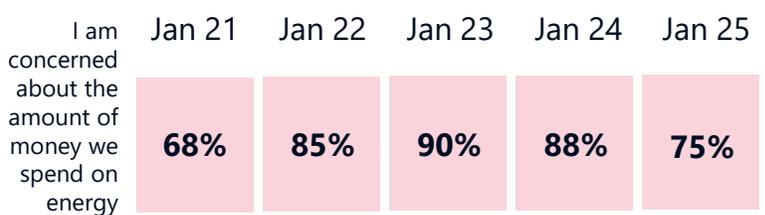
Awareness of NGN



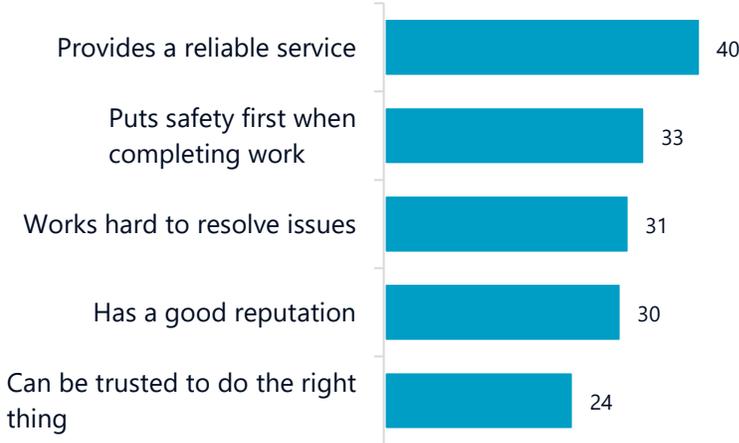
Difficulty paying bills



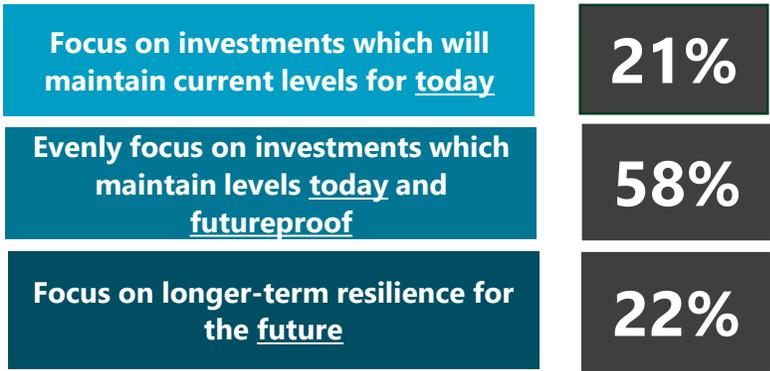
Concerns about energy spend



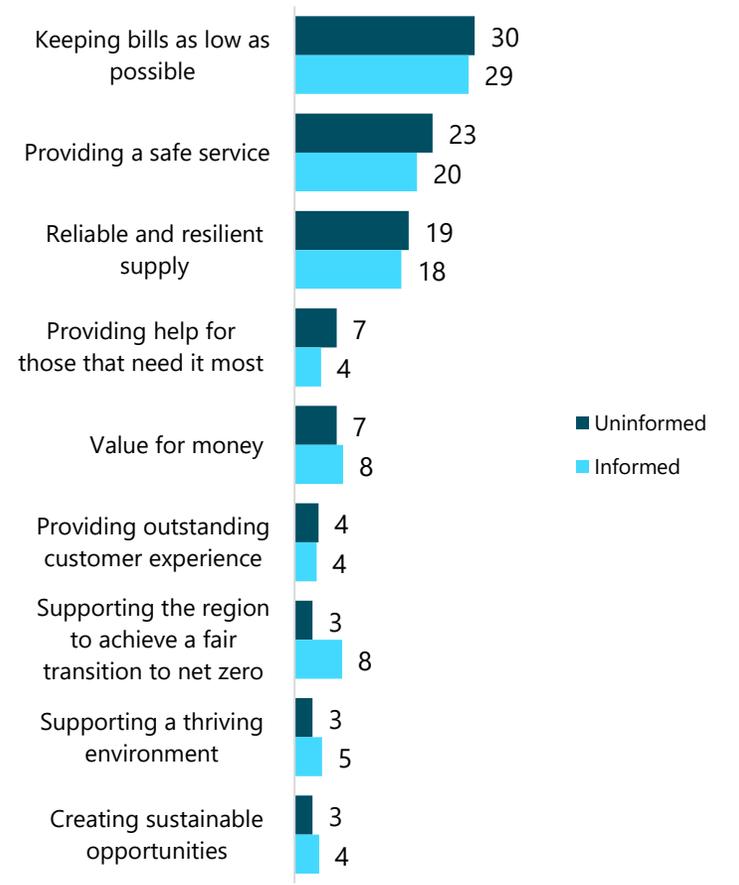
Brand Perception (Top 5)



Future Focus



Priorities



Q14 Had you previously heard of Northern Gas Networks? / Q17 How much do you agree or disagree with the following statements? / C5 Which one of the following statements best describes your situation with paying your energy bill? Q16/Q42. Please rank the following from 1-9 (where 1 is the most important) to indicate which you feel are the most important for NGN to focus on / Q41. Do you think NGN should? Q51. Which of the following statements do you think apply to NGN?
 Weighted base: Wave 5: Total 1423, Domestic: 1223, Business: 200

Awareness and perception of NGN

2

1

Awareness of NGN has grown among both domestic and business customers, with particularly high awareness among business customers (87% have heard of NGN).

2

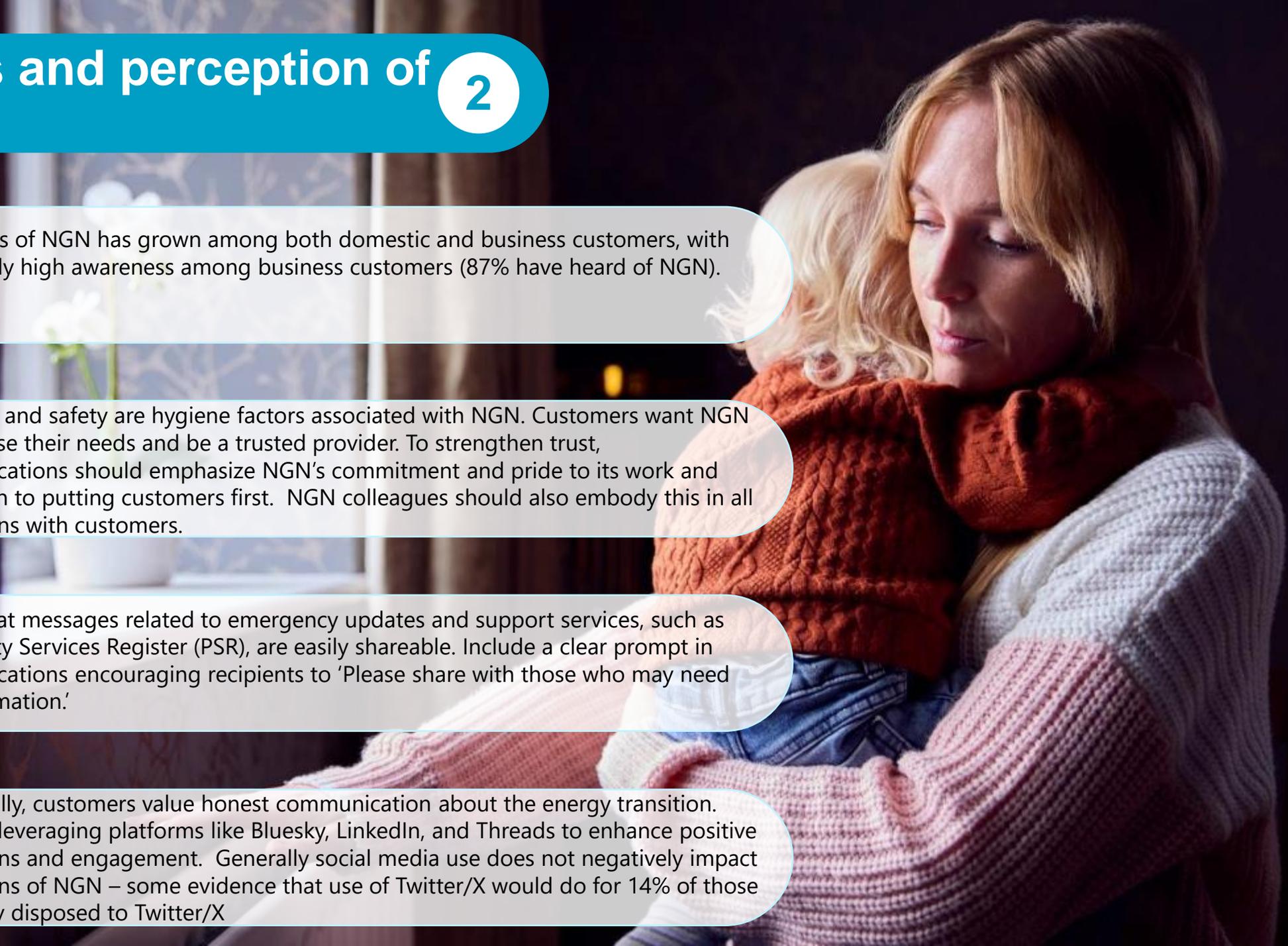
Reliability and safety are hygiene factors associated with NGN. Customers want NGN to prioritise their needs and be a trusted provider. To strengthen trust, communications should emphasize NGN's commitment and pride to its work and dedication to putting customers first. NGN colleagues should also embody this in all interactions with customers.

3

Ensure that messages related to emergency updates and support services, such as the Priority Services Register (PSR), are easily shareable. Include a clear prompt in communications encouraging recipients to 'Please share with those who may need this information.'

4

Additionally, customers value honest communication about the energy transition. Consider leveraging platforms like Bluesky, LinkedIn, and Threads to enhance positive perceptions and engagement. Generally social media use does not negatively impact perceptions of NGN – some evidence that use of Twitter/X would do for 14% of those negatively disposed to Twitter/X



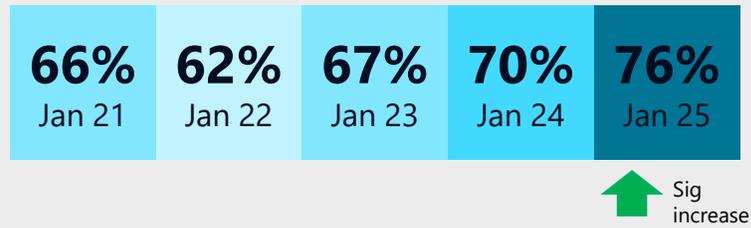
Awareness and perception of NGN 2

Awareness

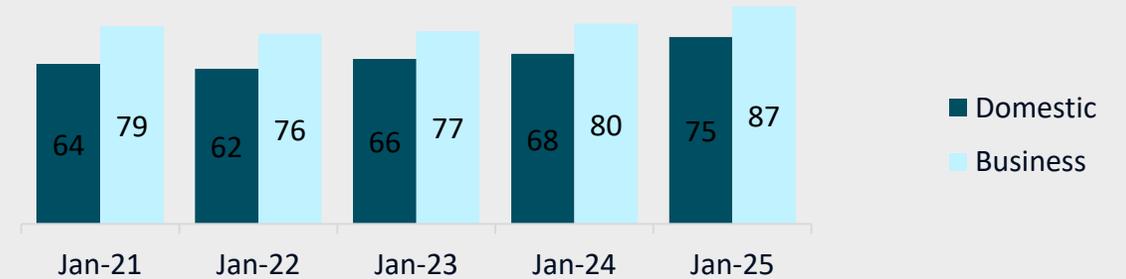
TRACKING QUESTION(S)

Awareness of NGN has increased among both domestic and business customers.

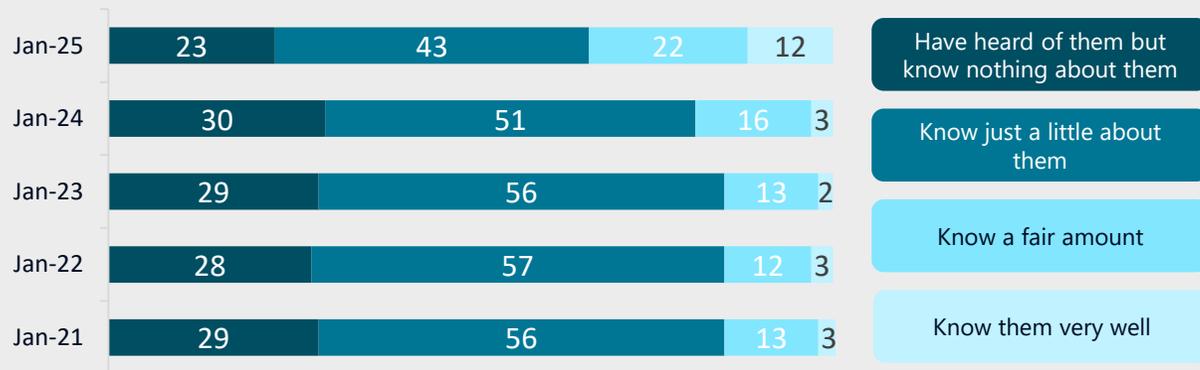
Awareness of NGN - Overall



Awareness of NGN – Domestic vs Business



Knowledge of NGN - Overall



Knowledge of NGN – Domestic vs Business



Awareness and perception of NGN 2

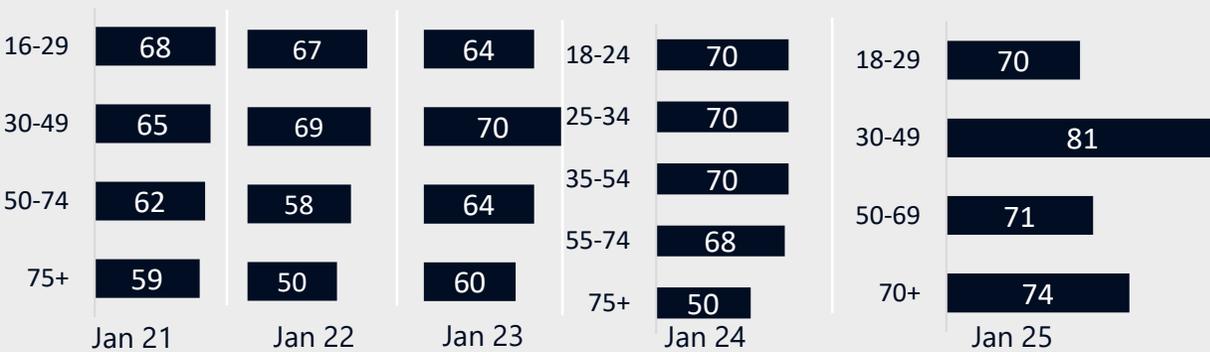
Domestic only

TRACKING QUESTION(S)

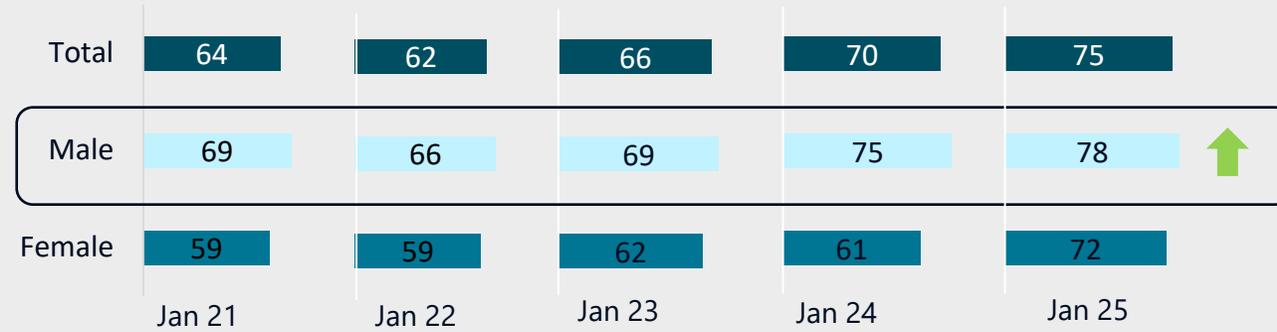


Consistently higher awareness of NGN among those eligible for PSR, males and social grade AB

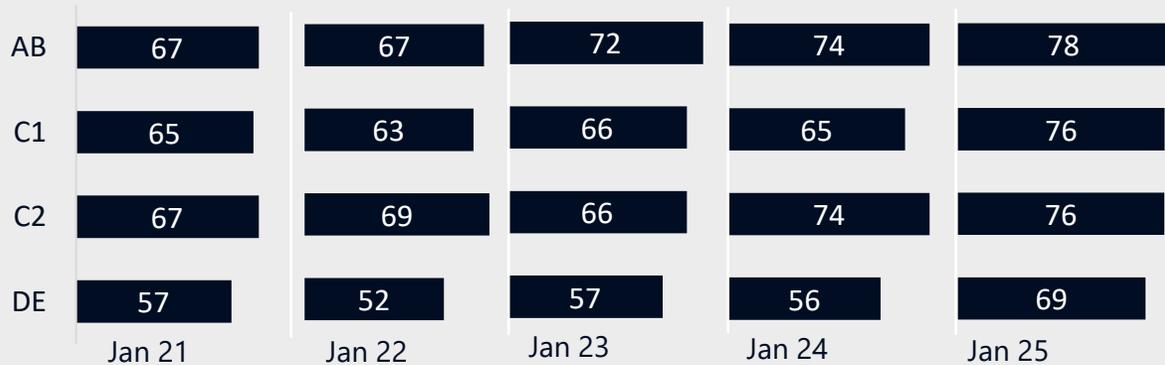
Awareness of NGN by age



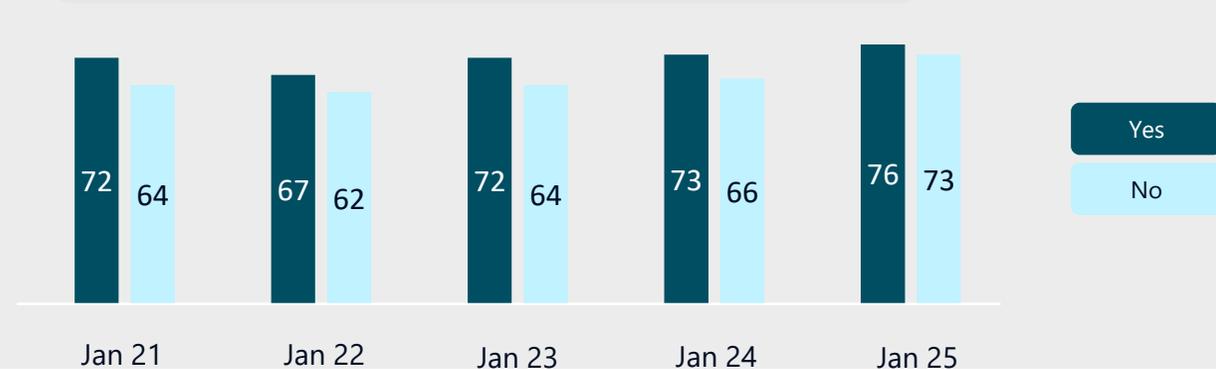
Awareness of NGN by gender



Awareness of NGN by SEG



Awareness of NGN by PSR eligible



Q14. Had you previously heard of Northern Gas Networks? / SES Segment/ Q2: Which of the following age groups do you fall into? / Q8 Are you (gender)/
Weighted base: DOMESTIC only (wave 1 Domestic: 1148; wave 2 Domestic 952; wave 3: Domestic 1100, wave 4: Domestic 1167, Weighted base; wave 5: Domestic: 1223)

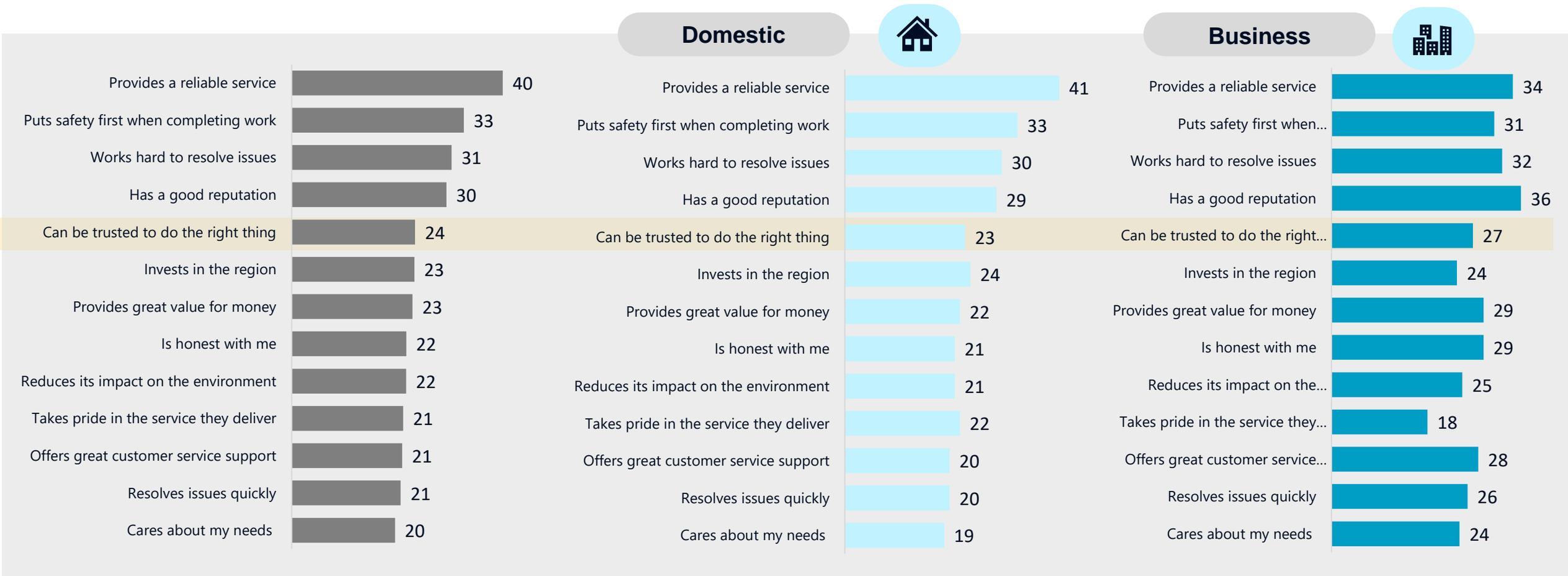
↑ ↓ Significantly higher/lower

Awareness and perception of NGN 2

Brand perceptions

NEW QUESTION

Domestic and business customers feel NGN is reliable and safety conscious organisation that works hard to resolve issues and has a good reputation



Q51. Which of the following statements do you think apply to NGN?
Weighted base: (wave 5: Domestic: 1223, Business: 200)

Domestic customers feel that reliability, **prioritising customer needs**, and trust, are key characteristics for NGN to embody.

Prioritising customer needs



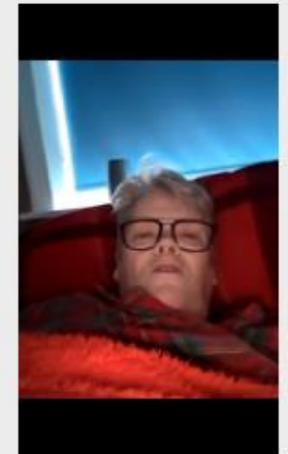
V1 – Resolve customer issues, be open and transparent



V3 – Be reliable and put customer needs first



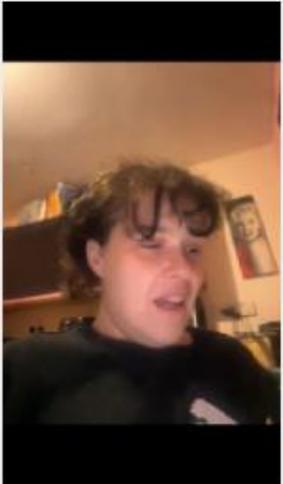
V5 – “Your real responsibility is to your customers who need help”



V4 – Have a good reputation and put customer needs first

Domestic customers feel that reliability, prioritising customer needs, **and trust**, are key characteristics for NGN to embody.

Trust



V11 – Trust and honesty



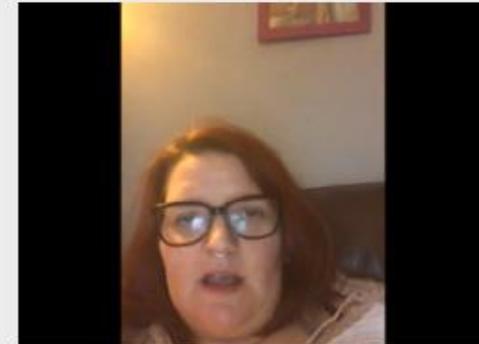
V13 – “We have to put our trust in companies and hope they are doing the best”



V16 – “Trust, honesty and good value for money”



V17 – Hard to trust due to big bonuses



V20 – Everyone wants to feel they are in the hands of a trusted company

Customer priorities

What do customers want to be kept up to date about?

2

NEW QUESTION

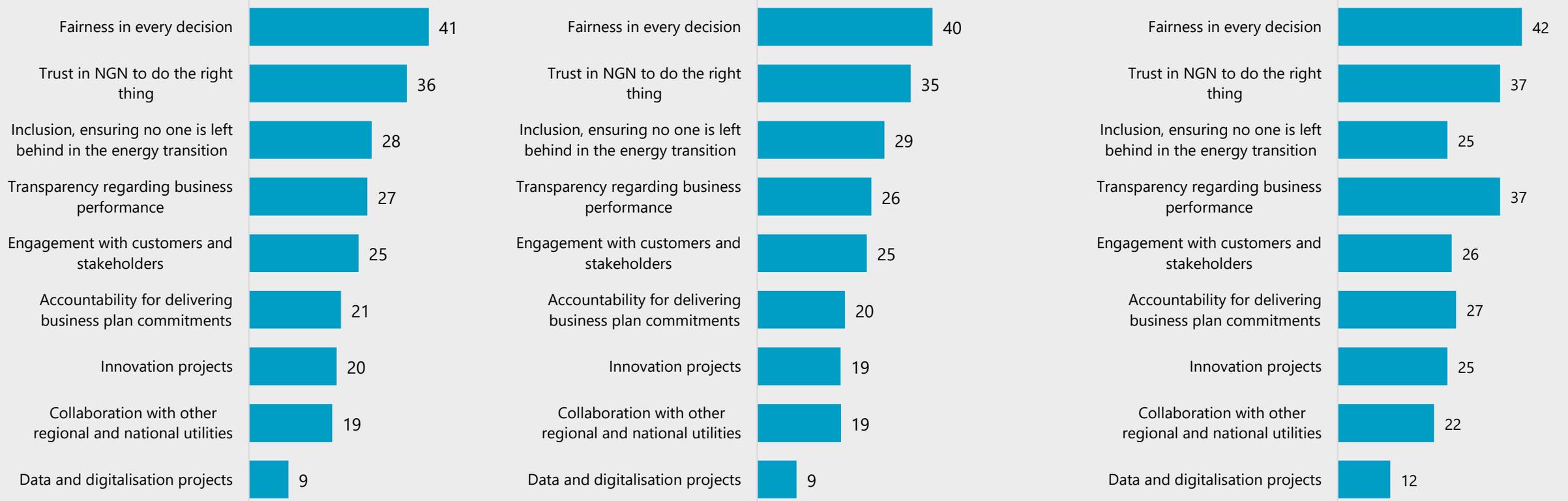
Domestic and business customers want to be kept up to date about fairness in decision making, trust, inclusion and transparency in business performance.

Overall

Domestic



Business



Customer priorities

What do customers want to be kept up to data about?

2

YIC completed the ranking in a different way, results included for context and not directly comparable

Domestic

Future Customers

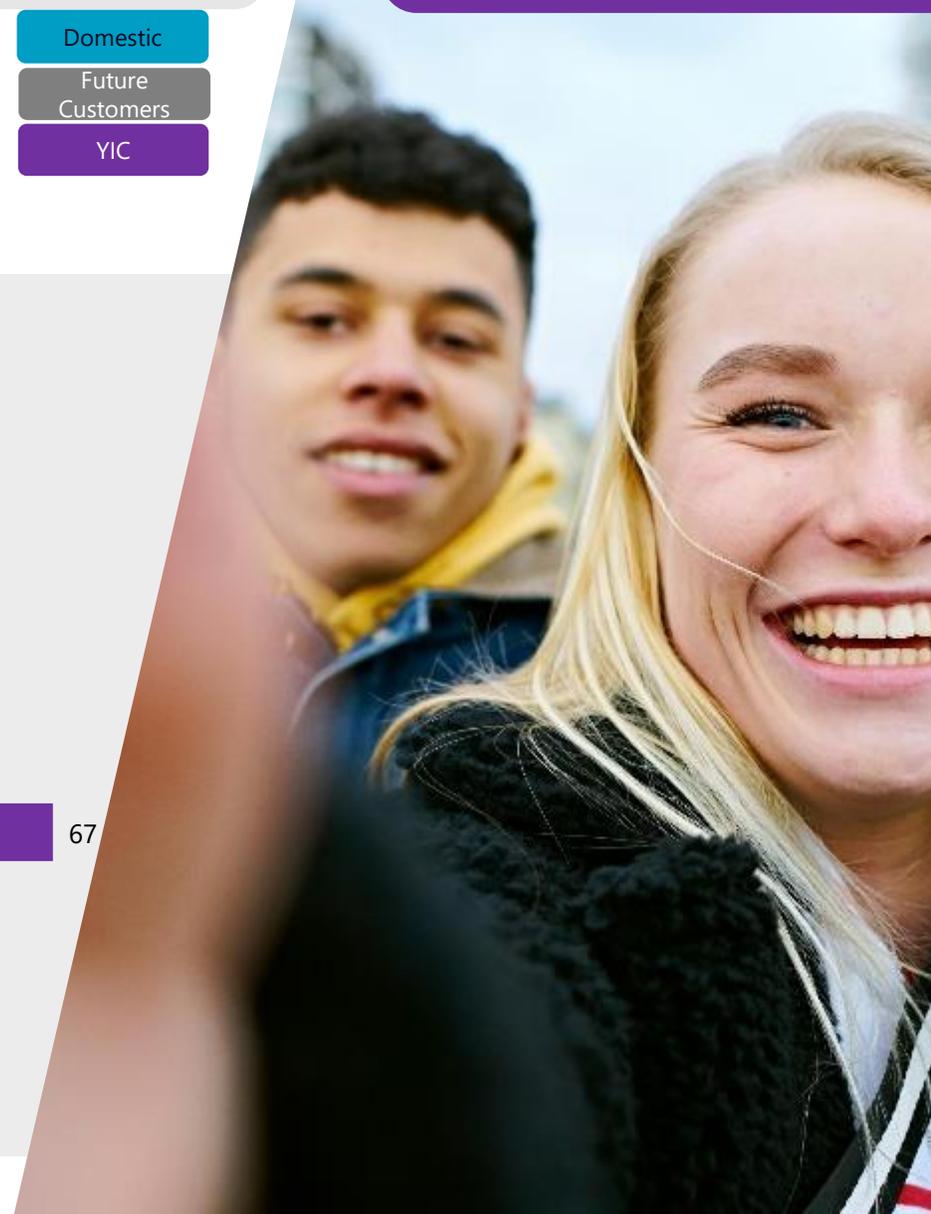
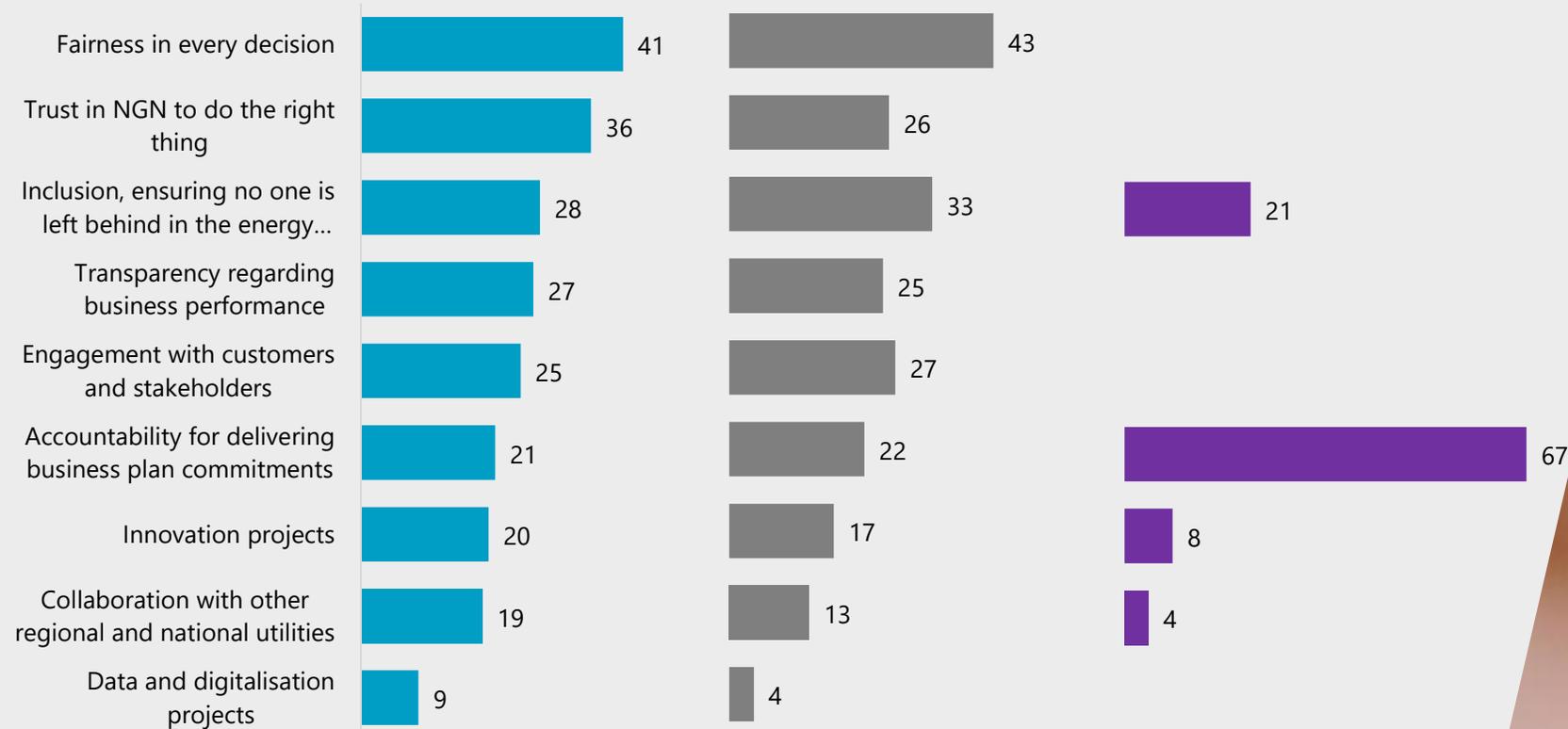
YIC

TRACKING QUESTION(S)

YOUNG INNOVATION COUNCIL

Future customers surveyed also want to understand about fairness in decision making. The YIC would like accountability for delivering on business plan commitments

Domestic



Q50. Which of the following aspects of NGN's approach to your priorities (while ensuring system efficiency and long-term value for money), are the most important for you to hear more about? You may select more than one aspect. Weighted base; Wave 5: Domestic: 1,223, Future: 69, YIC: 25 .

Drivers of trust

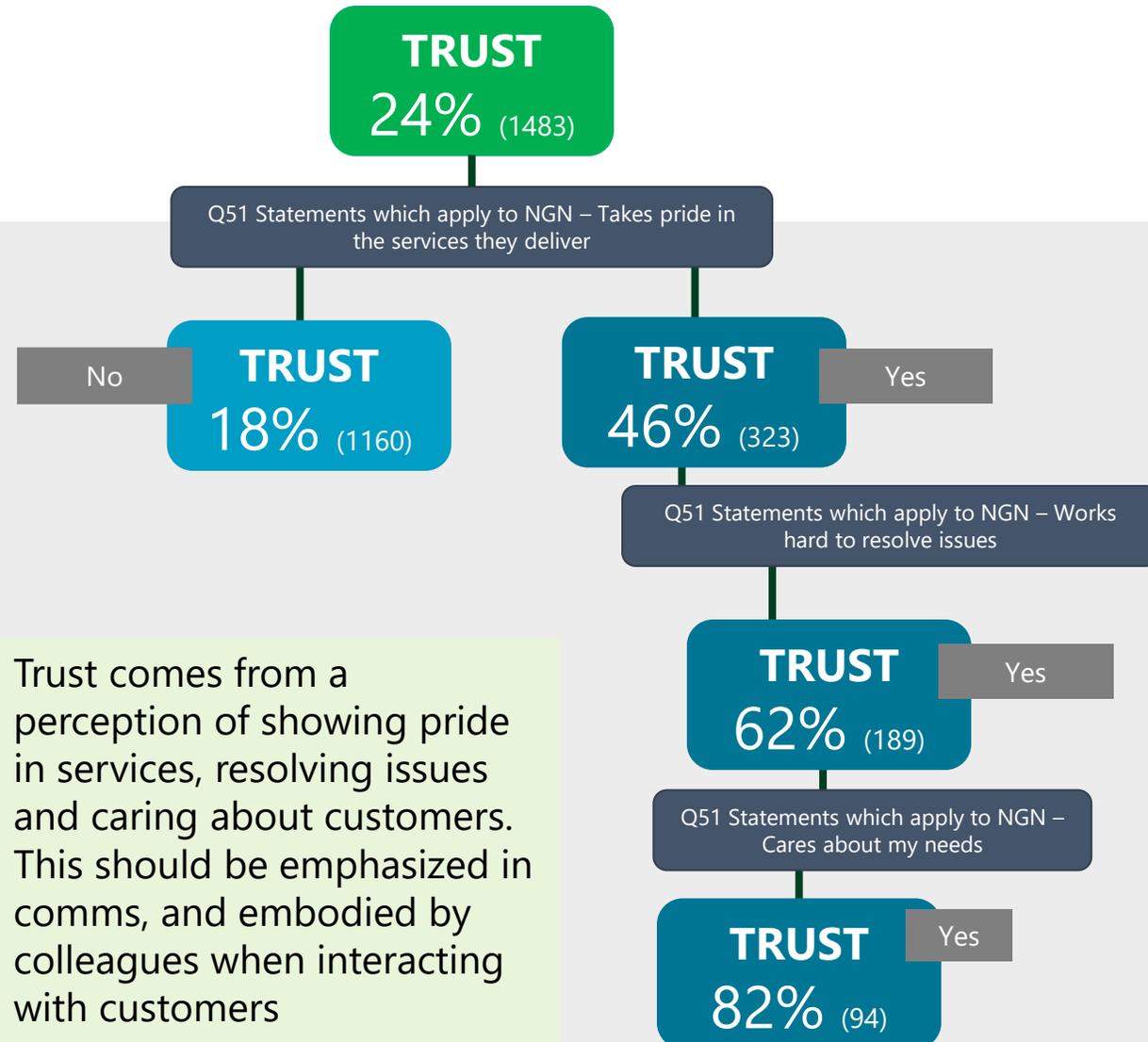
How can NGN drive trust **upwards**

2

Perceptions of trust did not significantly differ among different demographics (age, gender, social grade)

NEW QUESTION

CHAID ANALYSIS



Trust (I trust them to do the right thing)
24%

Trust increases from 24% to **46%** if customers associate NGN with **taking pride in the services they offer**

Trust increases further to **62%** if customers also associate NGN with **working hard to resolve issues**

Trust increases further to **82%** if customers also associate NGN with **caring about their needs**

Trust drops to **18%** if customers don't associate NGN with **taking pride in the services they offer**

Trust comes from a perception of showing pride in services, resolving issues and caring about customers. This should be emphasized in comms, and embodied by colleagues when interacting with customers

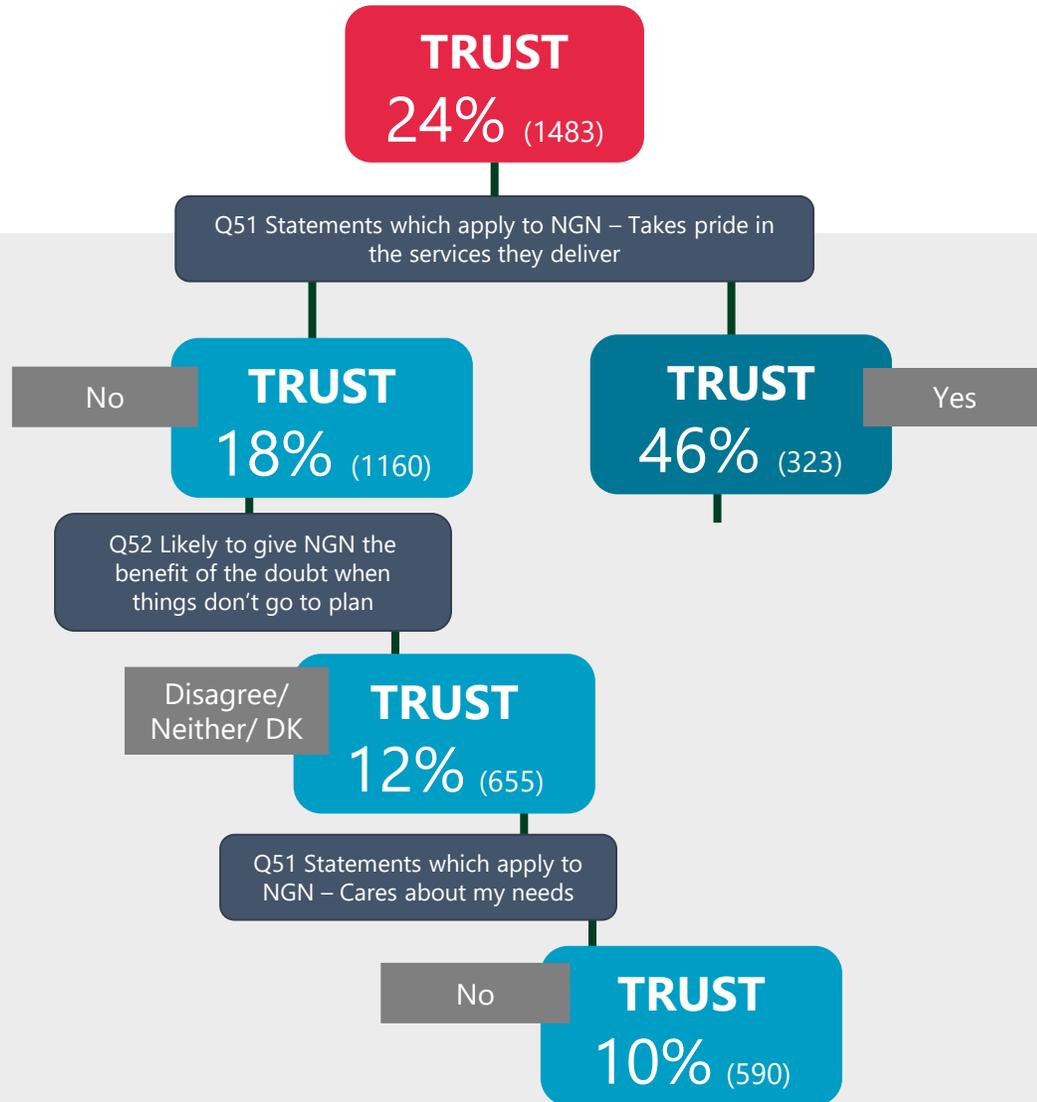
Drivers of trust

What will drive trust **downwards**

2

NEW QUESTION

CHAID ANALYSIS



If NGN don't show pride in what they deliver, customers won't think their needs are cared for and won't give NGN the benefit of the doubt



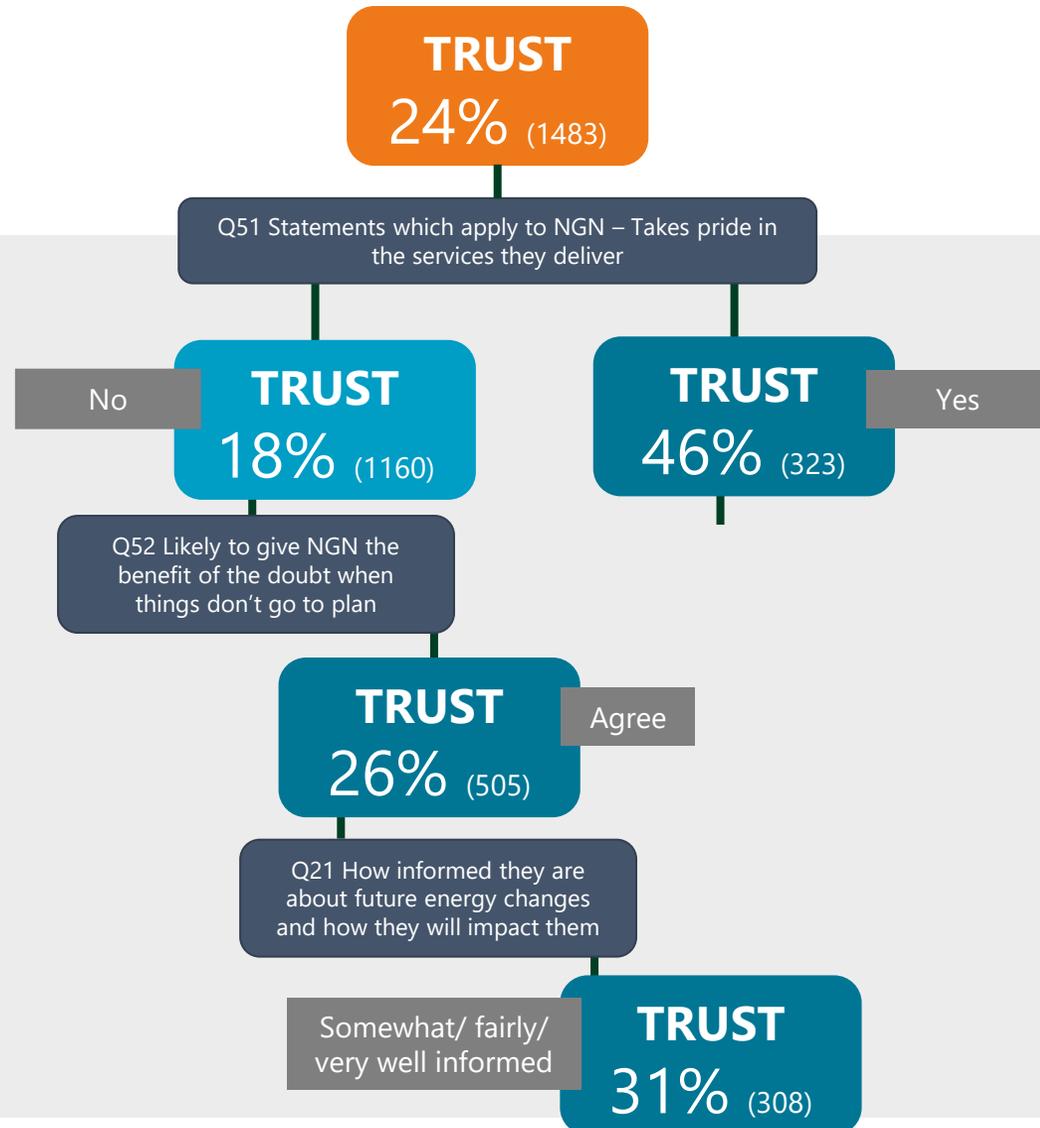
Drivers of trust

How to mitigate against a lack of perception that NGN takes pride in the services they deliver

2

NEW QUESTION

CHAID ANALYSIS



Trust (I trust them to do the right thing)
24%

Trust will decrease from 24% to 18% if customers don't associate NGN with **taking pride in the services they offer**

However, to mitigate this loss, if customers are likely to give NGN the **benefit of the doubt if things go wrong**, trust increases back up to 26%

Trust increases further to 31% if customers are **well informed about how the future energy changes will impact them**

Focus on informing customers about future energy changes and they will give you the benefit of the doubt when things don't go to plan

Awareness and perception of NGN 2

Advocacy

NEW QUESTION

Customers are most likely to share emergency updates from NGN with local people, or recommend support services

Overall

Top 2 box %

Share gas emergency updates from NGN with local people



53%

Promote energy related support services to friends and family, such as the PSR



49%

Give NGN the benefit of the doubt when things don't go to plan



49%

Like or respond positively to NGN social media campaigns



38%

Talk positively or negatively to others



36%

Consider career or apprenticeship opportunities at NGN



29%

Very unlikely Quite unlikely Neutral Quite likely Very likely Don't Know

Awareness and perception of NGN 2

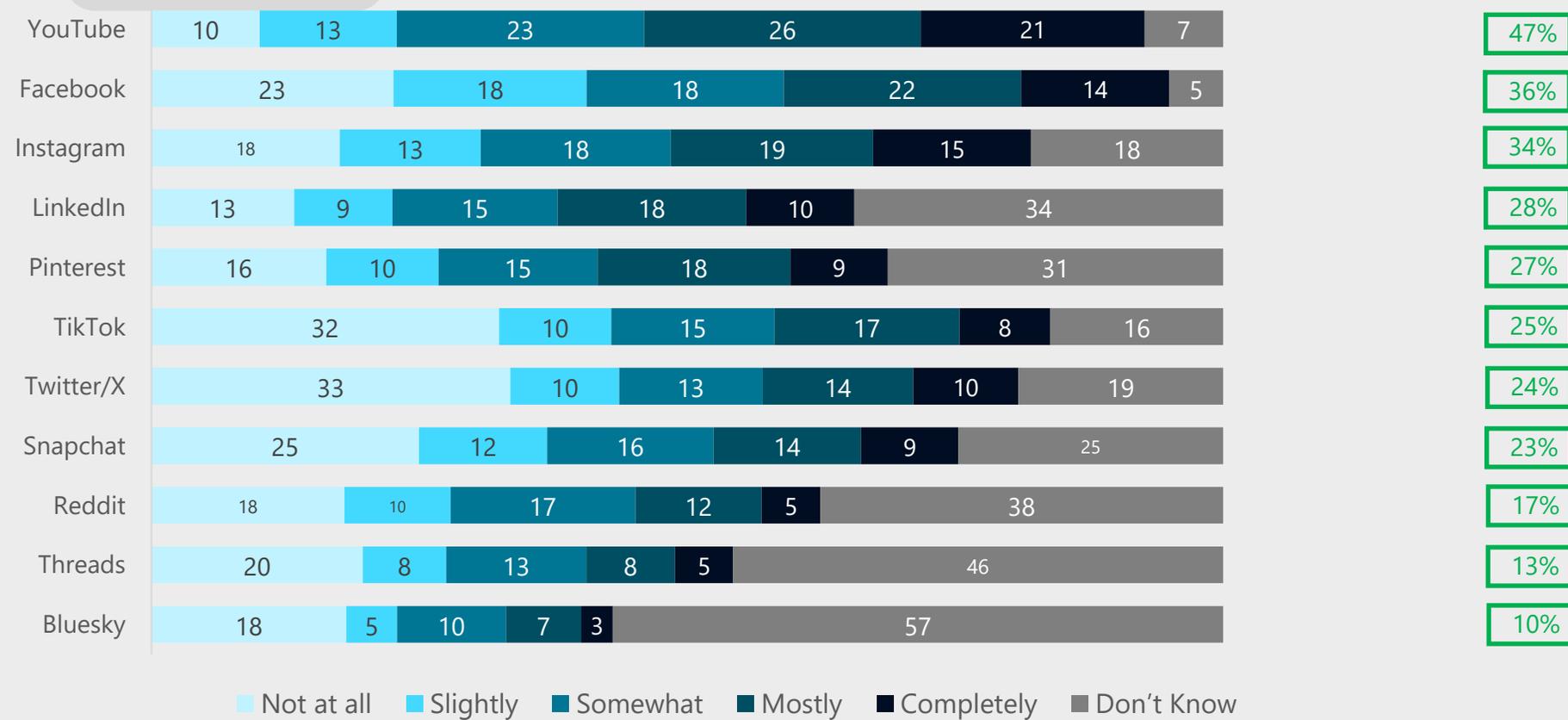
Trust in social media sites

NEW QUESTION

YouTube, Facebook, Instagram and LinkedIn most trusted

Top 2 box %
(completely/ mostly)

Overall



■ Not at all
 ■ Slightly
 ■ Somewhat
 ■ Mostly
 ■ Completely
 ■ Don't Know

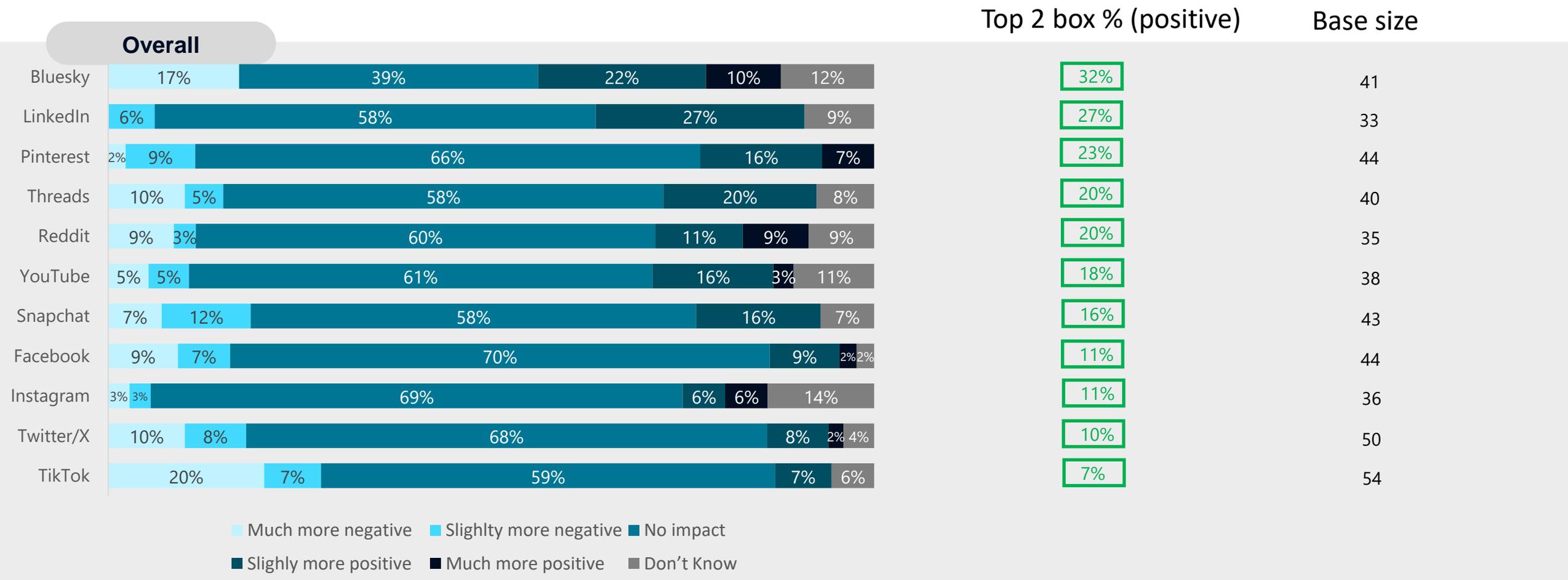
Awareness and perception of NGN

Impact of NGN using social media site (those with positive sentiment to site)

2

NEW QUESTION

Consider use of Bluesky, LinkedIn and Threads to facilitate positive perceptions



Q55. If NGN were to use [] to provide updates about their services and activities and information about the business, would it change your opinion of them?
 Weighted base: (wave 5: 475) Looked at Tik Tok, Instagram, Facebook among younger audience. Small base sizes but not much difference to total sample

Awareness and perception of NGN

Impact of NGN using social media site (those with negative sentiment to site)

2

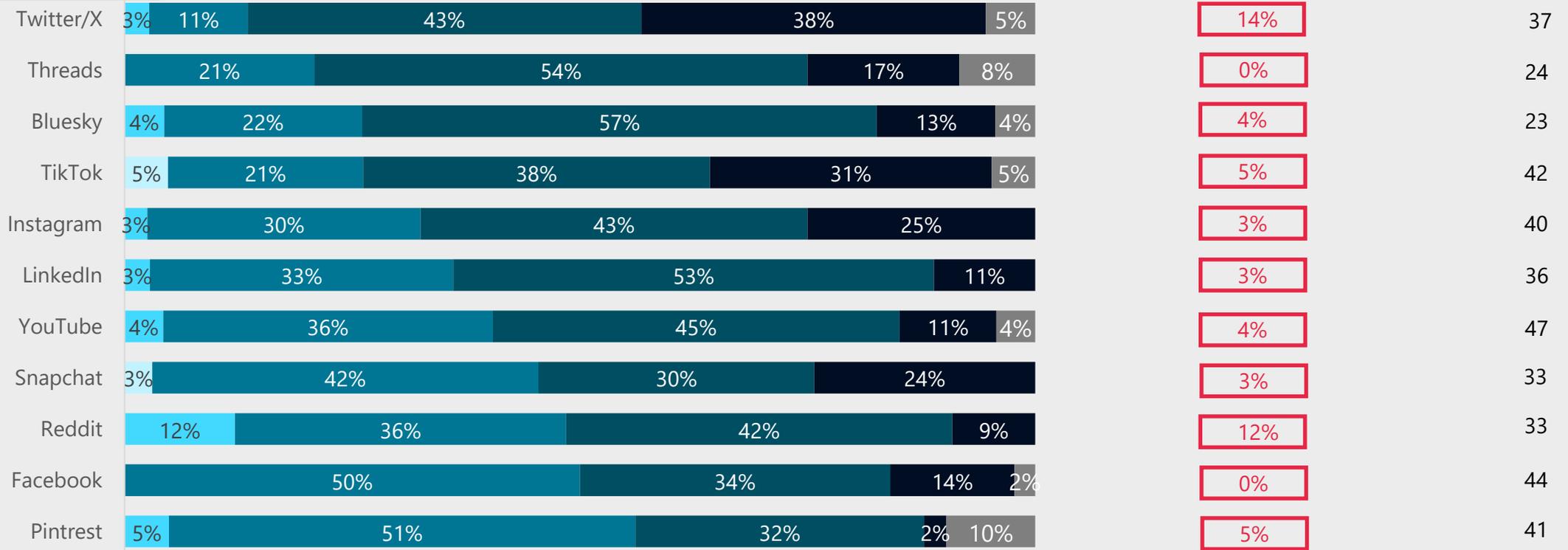
NEW QUESTION

Even those who have a negative perception of a site are unlikely to perceive NGN more negatively if they used it for updates – the highest incidence of this occurring is for Twitter/X when 14% said it would have a negative impact on perceptions. .

Bottom 2 box %
(negative)

Base size

Overall



■ Much more negative
 ■ Slightly more negative
 ■ No impact
 ■ Slightly more positive
 ■ Much more positive
 ■ Don't Know

Q56. If NGN were to use [] to provide updates about their services and activities and information about the business, would it change your opinion of them?
Weighted base: (wave 5: 412). Looked at Tik Tok, Instagram, Facebook among younger audience. Small base sizes but not much difference to total sample

Customer energy use and priorities

3

1

Half of domestic customers continue to struggle with paying their bills, as the cost-of-living crisis remains a significant challenge. Businesses, however, show some signs of recovery, with the proportion facing payment difficulties decreasing to just over a third. Despite this, three-quarters of both domestic and business customers remain concerned about their energy costs, and 60% of domestic customers self ration (more amongst older (68%) and those eligible for PSR (64%))

2

Keeping bills as low as possible remains the top priority, followed closely by safety and reliability. These priorities are consistent across both informed and uninformed customers, households and businesses, and various demographic groups. Business and domestic customers would most like to hear about fairness in decision making, trust and transparency in business performance.

3

Around half of all customers believe their priorities for NGN will shift over the next five years, driven by ongoing economic pressures, personal circumstances, or the need to support Net Zero goals. Those who have experienced a change in household income or become more concerned about environmental issues are more likely to think their priorities for NGN will change in the next 5 years. There is a clear tension between the need to keep costs low while also supporting Net Zero ambitions and ensuring a safe, reliable energy supply.

Energy use and concerns

Paying energy bills

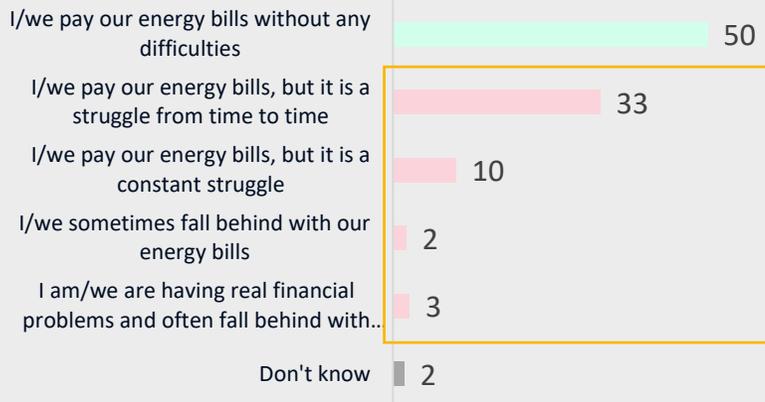
3

TRACKING QUESTION(S)

The proportion of domestic customers who pay their bills with difficulty has remained relatively stable for the past three years, though this has reduced for business customers

Paying your energy bill - overall

	Jan 21	Jan 22	Jan 23	Jan 24	Jan 25
Pay without difficulty	67%	58%	48%	49%	50%
Pay with difficulty	30%	40%	50%	48%	48%



Domestic

	Jan 21	Jan 22	Jan 23	Jan 24	Jan 25
Pay without difficulty	66%	53%	44%	49%	48%
Pay with difficulty	33%	46%	55%	48%	50%

Business

	Jan 21	Jan 22	Jan 23	Jan 24	Jan 25
Pay without difficulty	69%	58%	48%	49%	65% ↑
Pay with difficulty	19%	35%	43%	41%	36%



V18 – Poor health, but regulating energy use due to cost. Positive about PSR.

C5. Which one of the following statements best describes your situation with paying your energy bill? (Tracking question) (wave 1 = 1411; Domestic: 1148; Business: 263) (wave 2 = 1124; Domestic: 952, Business: 172; wave 3 = 1355, Domestic: 1,100, Business: 255, wave 4: 1403, Domestic: 1167, Weighted base; wave 5: 1423, Domestic: 1223, Business: 200)

↑↓ Significantly higher/lower than total

Energy use and concerns

Agreement about energy usage and cost

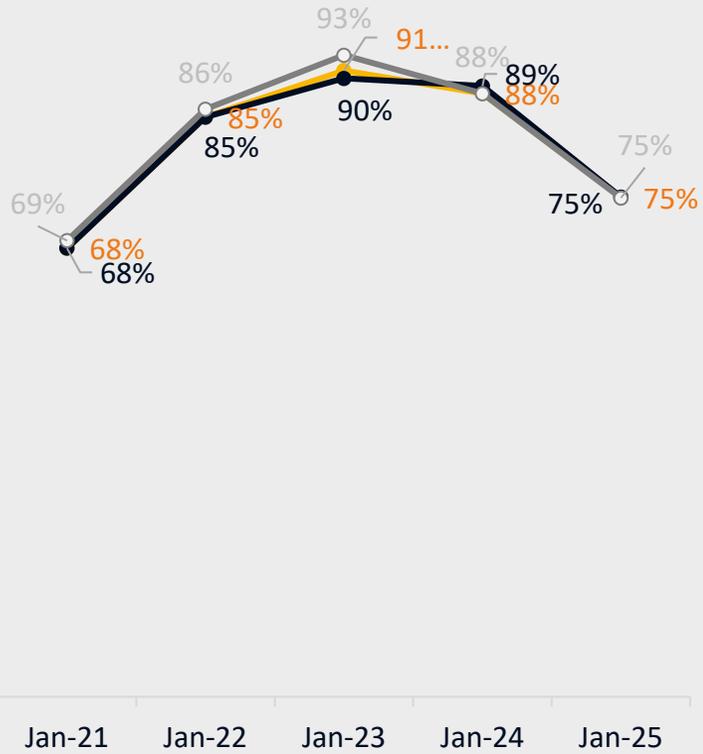
3

TRACKING QUESTION(S)

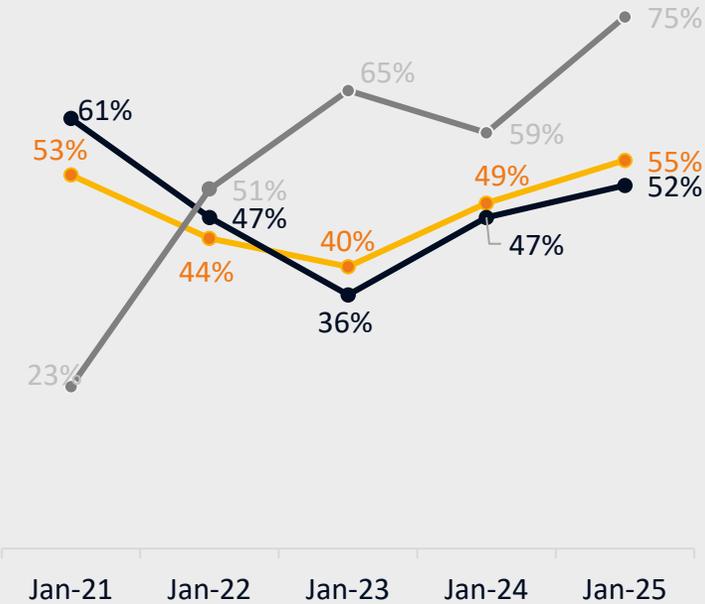
- Total
- Domestic
- Business

Concern about energy spend and use shows some decreases across both domestic and business customers, though 75% remain concerned. Perceived actual usage has increased, especially for business customers.

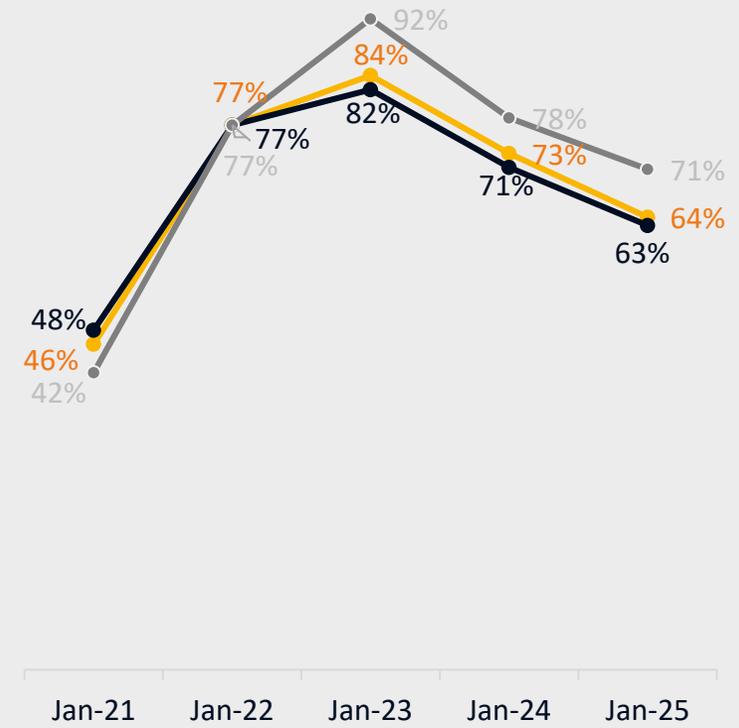
I am concerned about the amount of money we spend on energy



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



Q17 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, Weighted base; wave 5: 714, Domestic: 608, Business: 106)

Energy use and concerns

Impact of energy crisis

3

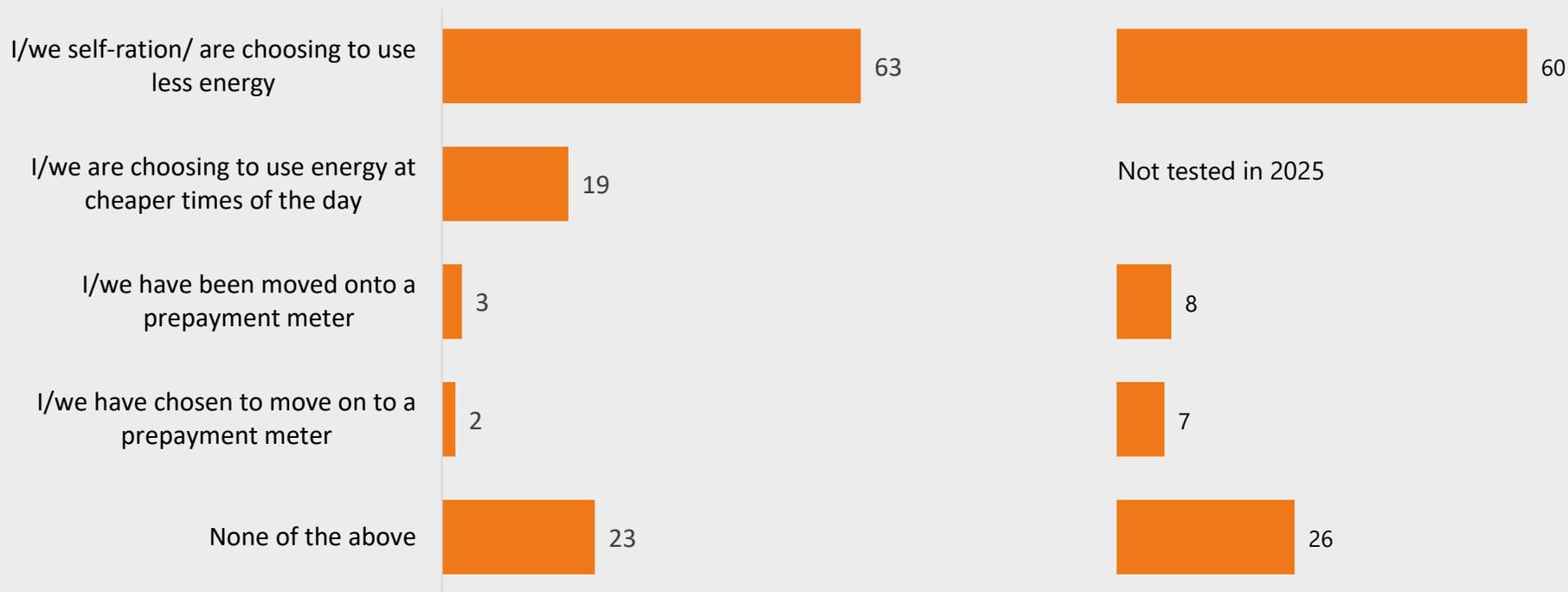
TRACKING QUESTION(S)



The proportion of people who are self rationing and choosing to use less energy has remained relatively stable from 2024

Wave 4

Wave 5



As age increases, so too does the proportion of customers who are self rationing (68% 70+). Those who are eligible for the PSR are also more likely to self ration (64%).

Energy use and concerns

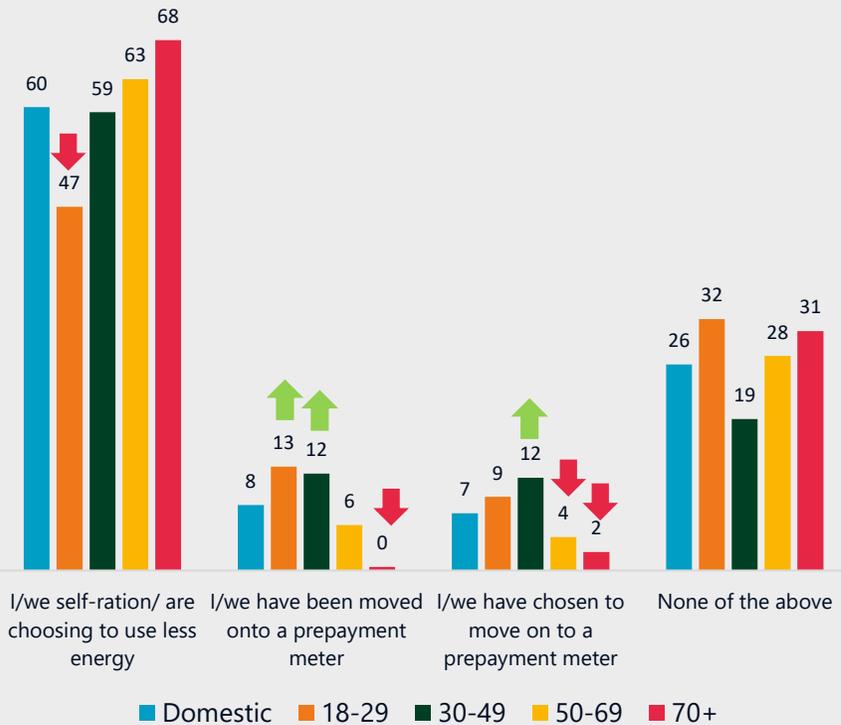
Impact of energy crisis – in subgroups

3

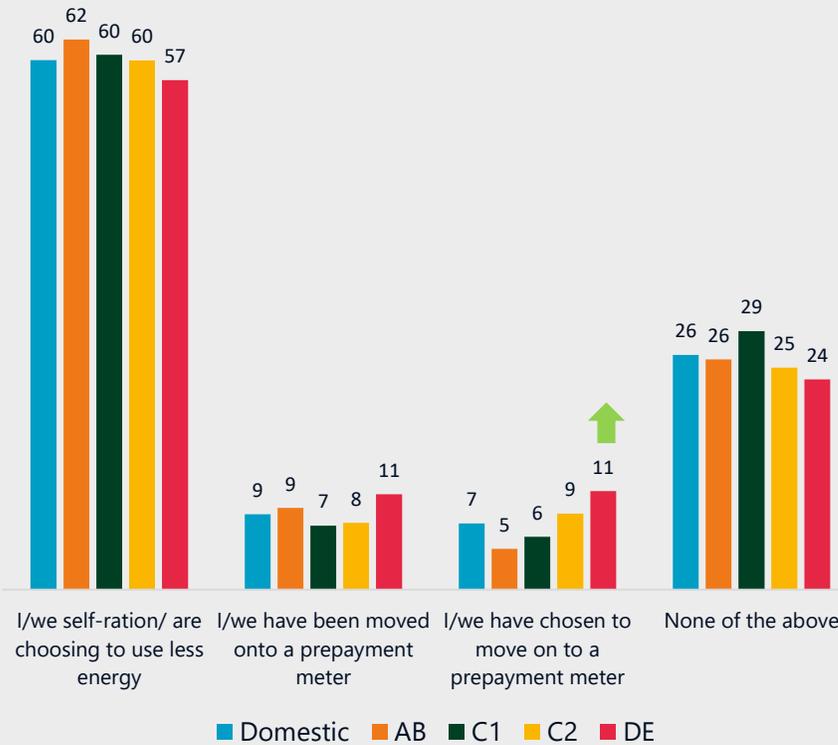


As age increases, so too does the proportion of customers who are self rationing.

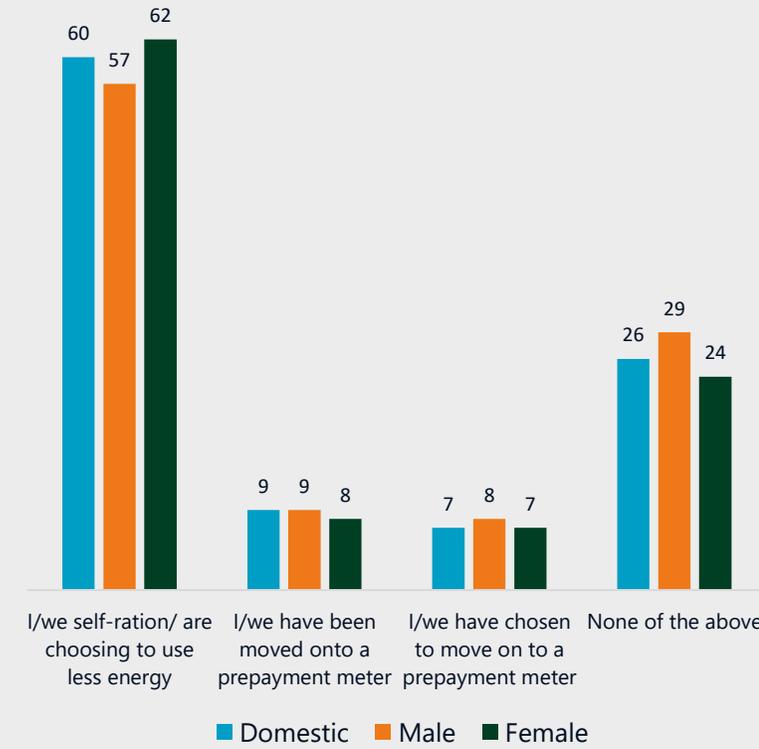
Age



SEG



gender



Energy use and concerns

Impact of energy crisis – in subgroups

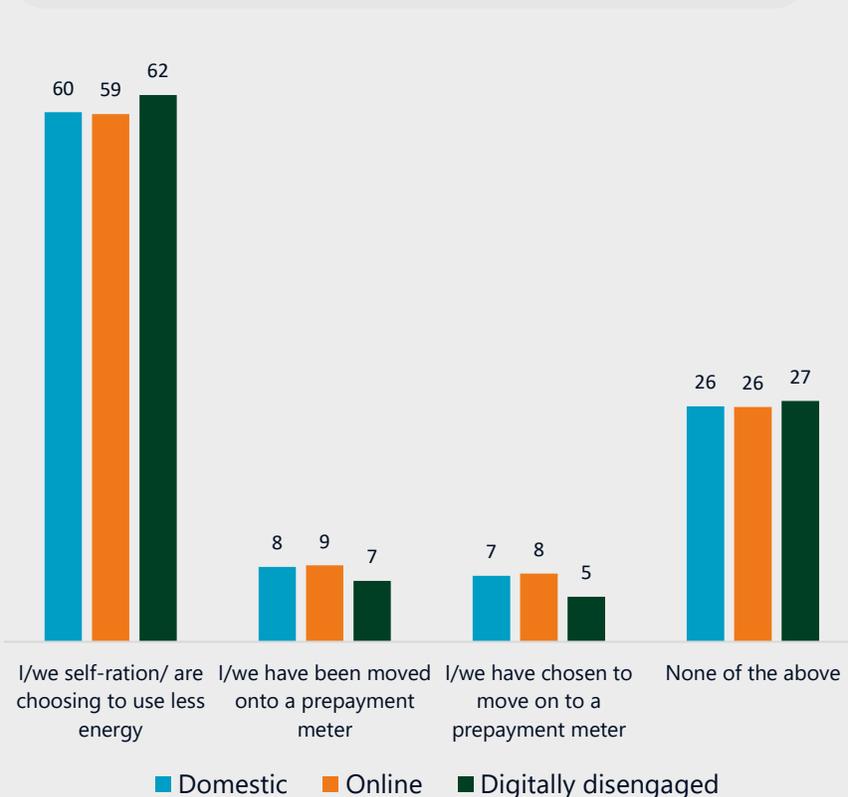
3

TRACKING QUESTION(S)

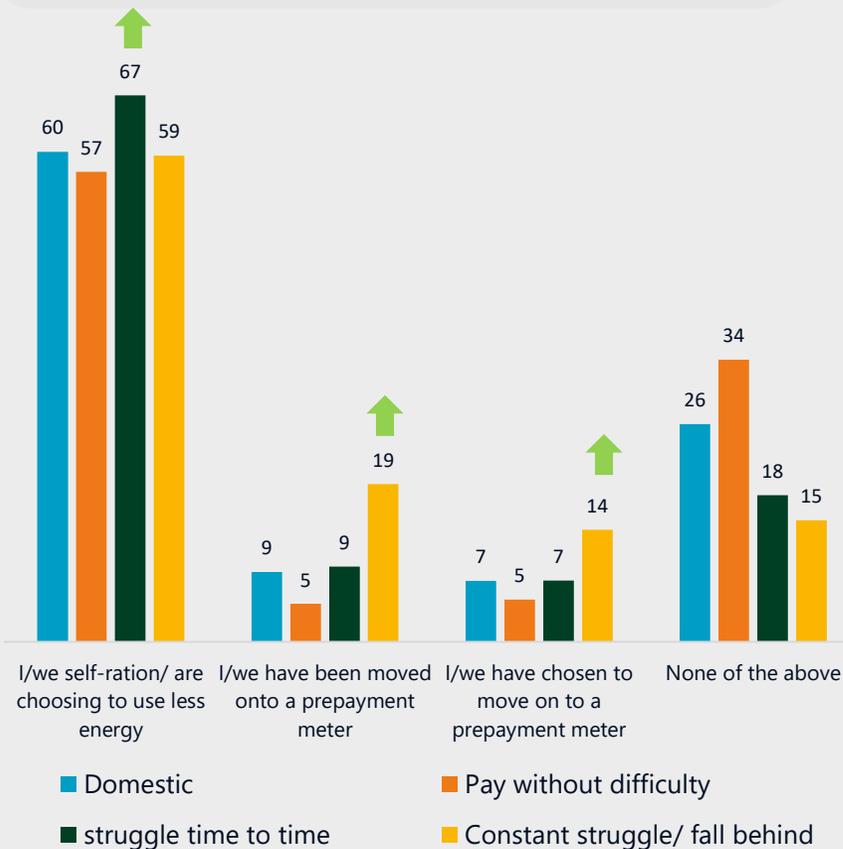


Those who are eligible for the PSR are also more likely to self ration

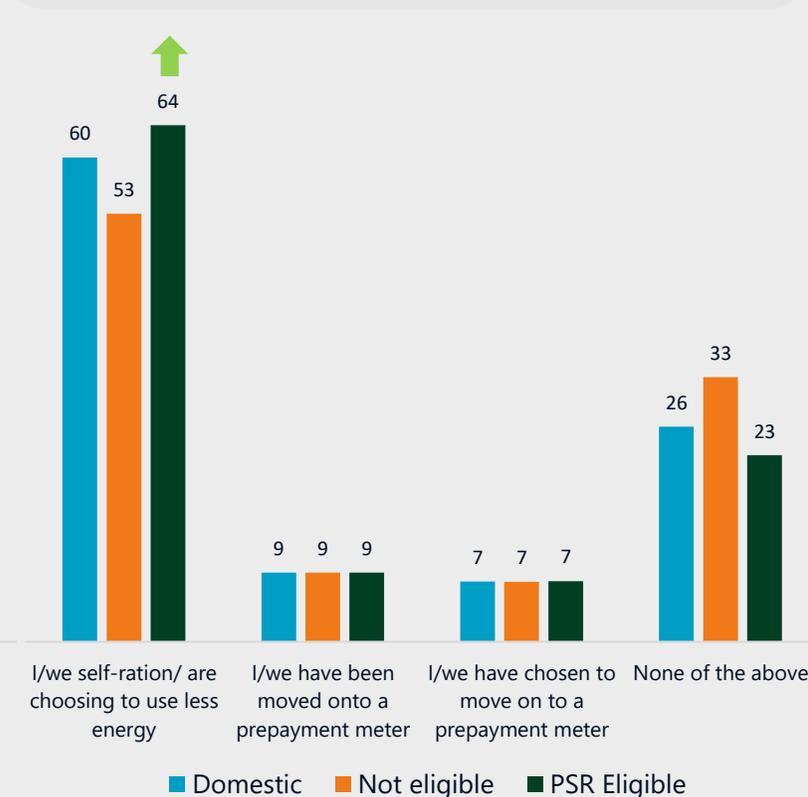
Digital status by financial hardship



Bill payment by financial hardship



PSR eligibility by financial hardship



Customer priorities

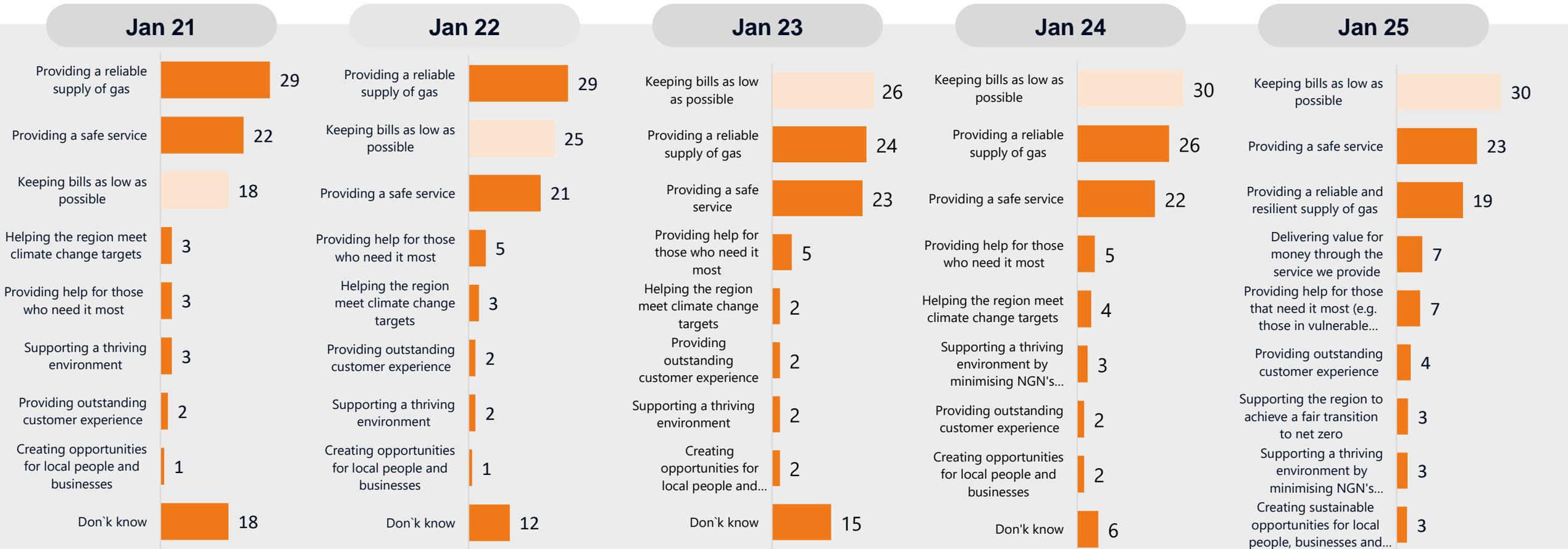
Customers uninformed priorities - overall

3

TRACKING QUESTION(S)

Tweaks to priorities made in 2025 – delivering value for money added, and helping the region meet climate change targets changed to helping the region achieve a fair transition to net zero

Keeping bills as low as possible continues to be the most important priority. Safety and reliability are consistently in the top 3, though safety has overtaken reliability.



Customer priorities

Customers uninformed priorities - by business / domestic

3

TRACKING QUESTION(S)

Domestic

Business

Both domestic and business customers prioritise keeping bills as low as possible. Safety slightly lower for business customers, and on a par with reliability, and delivering value for money higher.

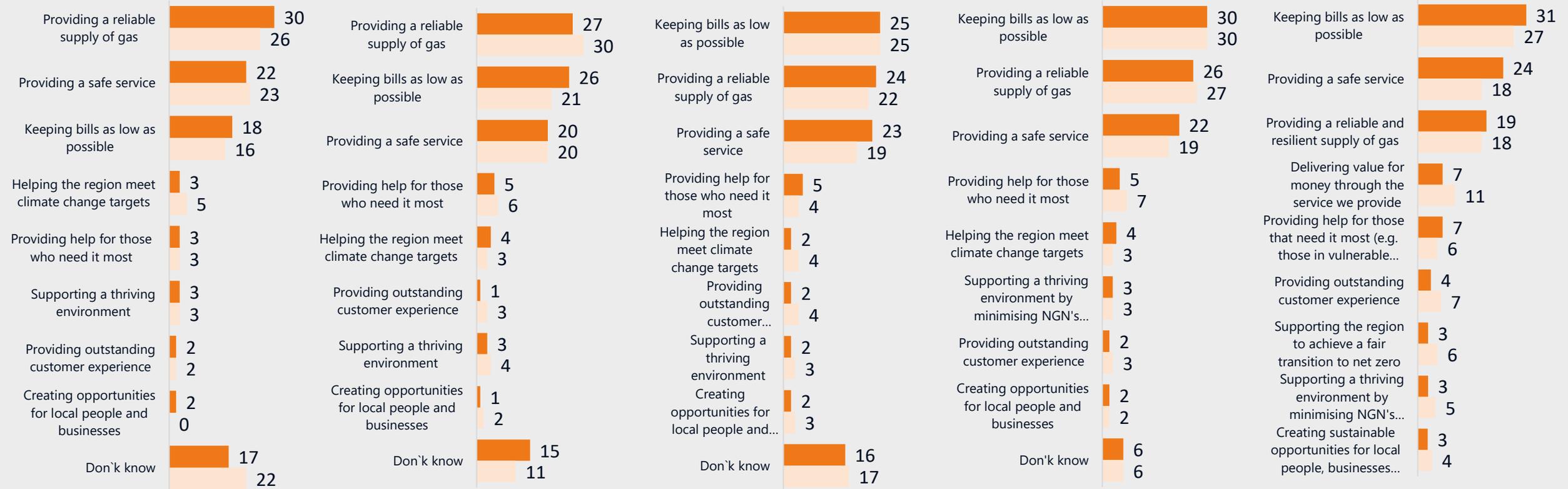
Jan 21

Jan 22

Jan 23

Jan 24

Jan 25



Q26/ Q16. Please rank the following from 1-8/ 1-9 (where 1 is the most important) to indicate which you feel are the most important for NGN to focus on (wave 1 = 1411; Domestic: 1148; Business 263) (wave 2 = 1124; Domestic 952, Business: 172, wave 3= 1355, Domestic 1100, Business 255, wave 4: 1403, Domestic: 1167, Business: 236 , Weighted base; wave 5: 1423, Domestic: 1224, Business: 200)

Customer priorities

Customers uninformed priorities - by subgroup

3

TRACKING QUESTION(S)



Providing help for those who need it most is perceived as more of a priority for digitally disengaged, those struggling with bills and social grade DE

Age – Jan 25 Domestic

	Age			
	18-29	30-49	50-69	70+
Supporting the region to achieve a fair transition to net zero	4%	5%	2%	1%
Keeping bills as low as possible	28%	31%	32%	30%
Delivering value for money through the service we provide	8%	8%	6%	6%
Providing a reliable and resilient supply of gas	15%	14%	23%	27%
Providing a safe service	22%	21%	27%	27%
Providing help for those that need it most	6%	8%	6%	7%
Providing outstanding customer experience	5%	6%	2%	1%
Supporting a thriving environment by minimising NGN's impact on the environment	5%	5%	1%	0%
Creating sustainable opportunities for local people, businesses and communities	6%	4%	1%	0%

SEG – Jan 25 Domestic

	SEG			
	AB	C1	C2	DE
Supporting the region to achieve a fair transition to net zero	3%	4%	3%	1%
Keeping bills as low as possible	26%	26%	35%	37%
Delivering value for money through the service we provide	7%	9%	7%	5%
Providing a reliable and resilient supply of gas	21%	21%	18%	18%
Providing a safe service	27%	24%	25%	21%
Providing help for those that need it most	4%	5%	7%	13%
Providing outstanding customer experience	7%	3%	2%	3%
Supporting a thriving environment by minimising NGN's impact on the environment	3%	3%	2%	3%
Creating sustainable opportunities for local people, businesses and communities	4%	3%	2%	1%

PSR Eligible – Jan 25 Domestic

	PSR Eligible	
	Yes	No
Supporting the region to achieve a fair transition to net zero	3%	2%
Keeping bills as low as possible	31%	30%
Delivering value for money through the service we provide	7%	7%
Providing a reliable and resilient supply of gas	19%	20%
Providing a safe service	23%	26%
Providing help for those that need it most	8%	6%
Providing outstanding customer experience	4%	4%
Supporting a thriving environment by minimising NGN's impact on the environment	3%	3%
Creating sustainable opportunities for local people, businesses and communities	3%	2%

Digital status – Jan 25 Domestic

	Digital status		Bills	
	Digitally disengaged	Online	Pay without difficulty	Constant struggle / fall behind
Supporting the region to achieve a fair transition to net zero	3%	3%	3%	3%
Keeping bills as low as possible	34%	30%	27%	34%
Delivering value for money through the service we provide	4%	7%	9%	5%
Providing a reliable and resilient supply of gas	22%	19%	20%	20%
Providing a safe service	19%	25%	29%	20%
Providing help for those that need it most	16%	6%	4%	9%
Providing outstanding customer experience	1%	4%	3%	4%
Supporting a thriving environment by minimising NGN's impact on the environment	1%	3%	3%	3%
Creating sustainable opportunities for local people, businesses and communities	0%	3%	2%	3%

Customer priorities

Customers informed priorities - overall

3

TRACKING QUESTION(S)

In 2025, uniformed and informed priorities are relatively consistent. Keeping bills as low as possible continues to be the most important priority.



Q48/42. 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 1-7/9 (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 = 1411; Domestic: 1148; Business 263) (wave 2 = 1124; Domestic 952, Business: 172, wave 3= 1355, Domestic 1,100, Business 255, wave 4: 1403, Domestic: 1167, Business: 236, Weighted base; wave 5: 1423, Domestic: 1223, Business: 200)

Customer priorities

Customers informed priorities - by subgroup

3

TRACKING QUESTION(S)



Once informed, reliability is more of a priority for those aged 50+, and safety for those who pay bills without difficulty.

Age – Jan 25 Domestic

	Age			
	18-29	30-49	50-69	70+
Supporting the region to achieve a fair transition to net zero	4%	8%	2%	1%
Keeping bills as low as possible	35%	26%	30%	31%
Delivering value for money through the service we provide	6%	9%	7%	9%
Providing a reliable and resilient supply of gas	11%	14%	27%	24%
Providing a safe service	18%	18%	22%	27%
Providing help for those that need it most	9%	9%	7%	5%
Providing outstanding customer experience	6%	4%	2%	3%
Supporting a thriving environment by minimising NGN's impact on the environment	4%	4%	2%	0%
Creating sustainable opportunities for local people, businesses and communities	7%	7%	2%	0%

PSR Eligible – Jan 25 Domestic

	PSR Eligible	
	Yes	No
Supporting the region to achieve a fair transition to net zero	3%	5%
Keeping bills as low as possible	30%	29%
Delivering value for money through the service we provide	7%	10%
Providing a reliable and resilient supply of gas	20%	17%
Providing a safe service	20%	21%
Providing help for those that need it most	9%	5%
Providing outstanding customer experience	4%	4%
Supporting a thriving environment by minimising NGN's impact on the environment	3%	3%
Creating sustainable opportunities for local people, businesses and communities	4%	5%

SEG – Jan 25 Domestic

	SEG			
	AB	C1	C2	DE
Supporting the region to achieve a fair transition to net zero	4%	5%	4%	3%
Keeping bills as low as possible	21%	30%	36%	31%
Delivering value for money through the service we provide	10%	7%	8%	8%
Providing a reliable and resilient supply of gas	20%	20%	15%	22%
Providing a safe service	26%	22%	19%	15%
Providing help for those that need it most	7%	6%	5%	13%
Providing outstanding customer experience	5%	3%	3%	4%
Supporting a thriving environment by minimising NGN's impact on the environment	4%	2%	4%	3%
Creating sustainable opportunities for local people, businesses and communities	4%	4%	6%	2%

Digital status – Jan 25 Domestic

	Digital status		Bills	
	Digitally disengaged	Online	Pay without difficulty	Constant struggle / fall behind
Supporting the region to achieve a fair transition to net zero	3%	4%	4%	4%
Keeping bills as low as possible	30%	30%	25%	33%
Delivering value for money through the service we provide	7%	8%	6%	10%
Providing a reliable and resilient supply of gas	27%	18%	23%	16%
Providing a safe service	18%	21%	27%	15%
Providing help for those that need it most	14%	7%	7%	9%
Providing outstanding customer experience	1%	4%	4%	3%
Supporting a thriving environment by minimising NGN's impact on the environment	1%	3%	2%	4%
Creating sustainable opportunities for local people, businesses and communities	0%	5%	3%	5%

Customer priorities

Customers informed priorities - by business / domestic

3

TRACKING QUESTION(S)

Domestic

Business

Domestic customers prioritise keeping bills low, safety and reliability. Business customers also see these as important, but other areas such as value for money, customer experience and minimising environmental impact are also important

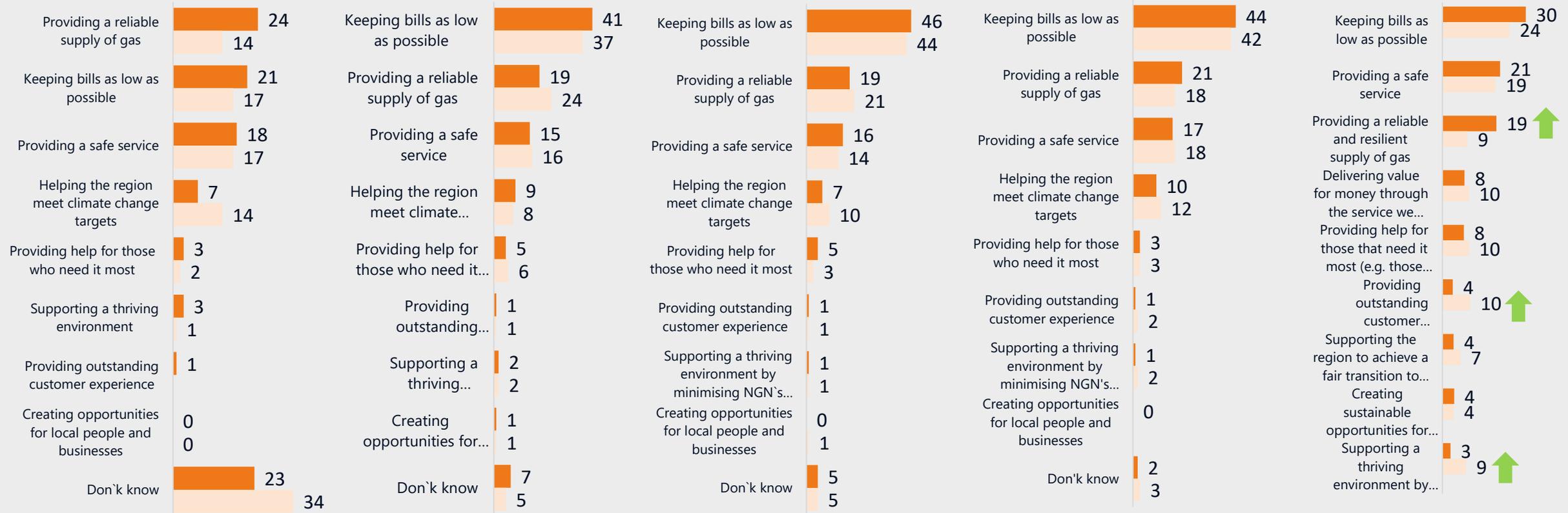
Jan 21

Jan 22

Jan 23

Jan 24

Jan 25



Q48/42. 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 1-7/9 (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 = 1411; Domestic: 1148; Business: 263) (wave 2 = 1124; Domestic: 952, Business: 172, wave 3= 1355, Domestic: 1,100, Business: 255, wave 4: 1403, Domestic: 1167, Business: 236, Weighted base; wave 5: 1423, Domestic: 1223, Business: 200)

Significantly higher/lower than total

Customer priorities

Customers uninformed vs informed priorities - overall

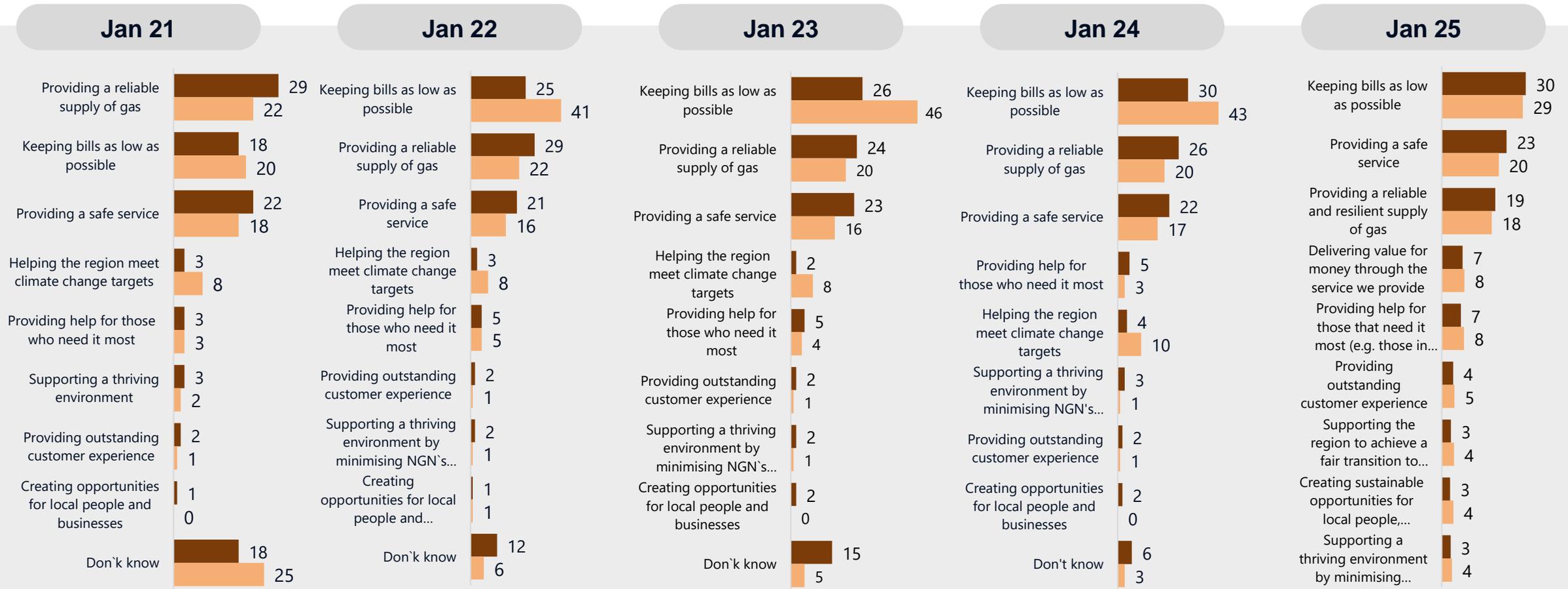
3

TRACKING QUESTION(S)

Uninformed

Informed

In 2025, uninformed and informed priorities are relatively consistent.



Q16/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, Weighted base; wave 5: 1443) 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.

Customer priorities

Customers informed priorities – domestic vs YIC

3

YIC completed the ranking in a different way, results included for context and not directly comparable

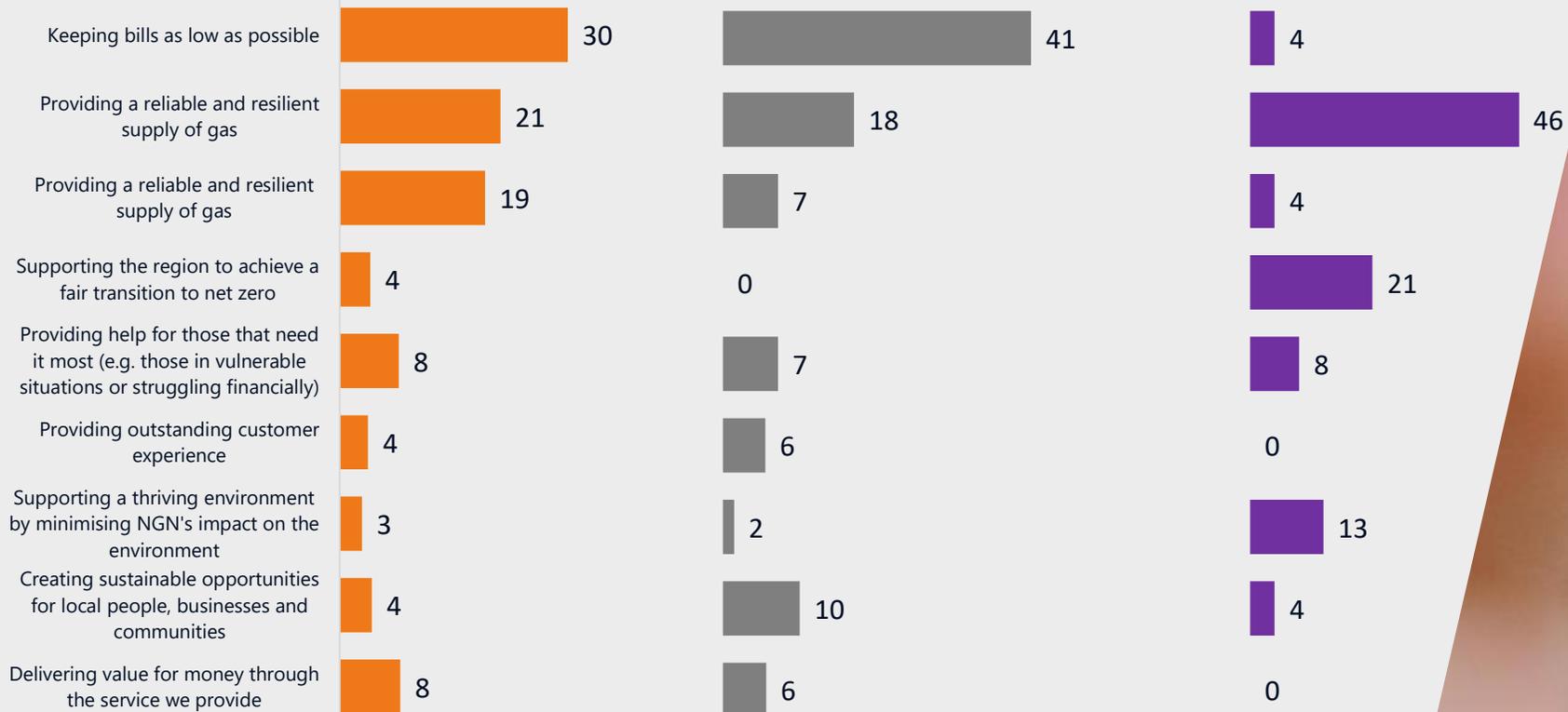
Domestic

Future Customers

YIC

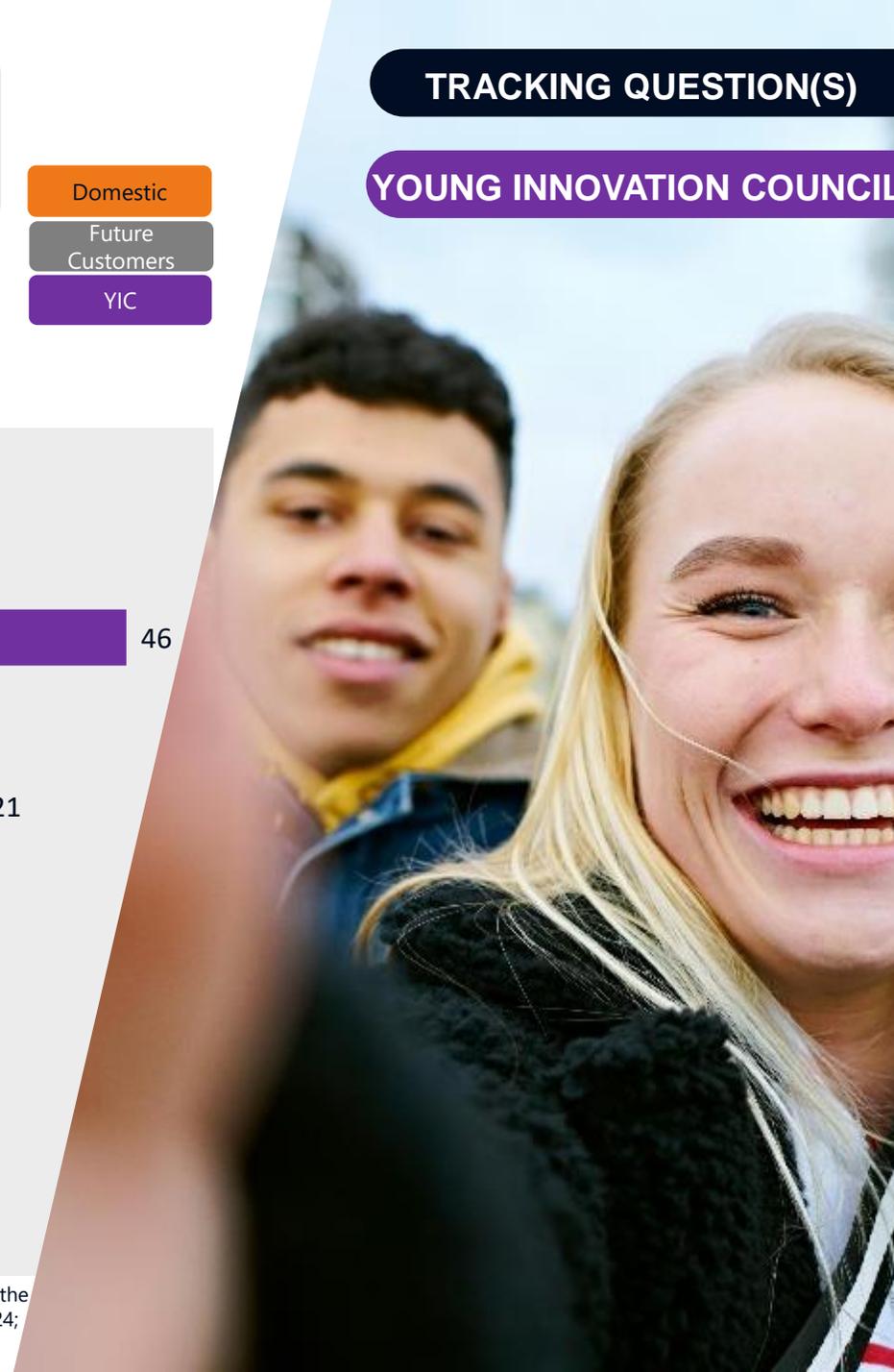
Domestic customers prioritise keeping bills low, safety and reliability. Future customers in the survey had similar priorities, though YIC place more importance on reliability and resilience, plus supporting the region on net zero ambitions

Jan 25



TRACKING QUESTION(S)

YOUNG INNOVATION COUNCIL



Q48/42. 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 1-7/9 (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 = 1411; Domestic: 1148; Business 263) (wave 2 = 1124; Domestic 952, Business: 172, wave 3= 1355, Domestic 1,100, Business 255, wave 4: 1403, Domestic: 1167, Business: 236, wave 5: 1423, Domestic: 1223, Business: 200)

Customer priorities

How will priorities change in the next 5 years?

3

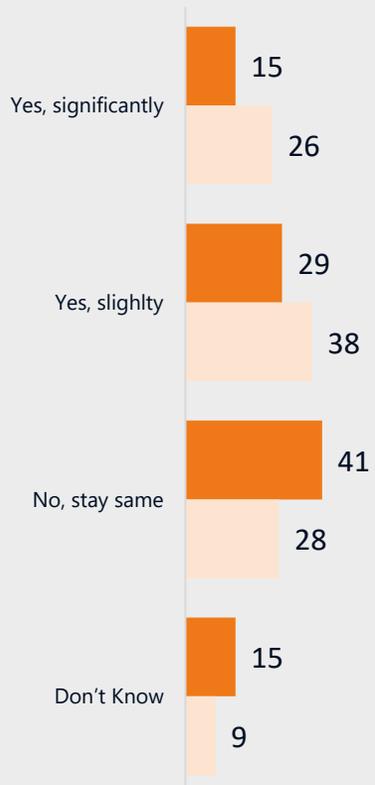
NEW QUESTION

Domestic

Business

Around half of all customers think their priorities for NGN will change in the next 5 years, often due to continued economic pressures, change in personal circumstances, or changes to support Net Zero.

% seeing change



Reason for change

Economic & Financial Pressures

- Increased cost of living and affordability concerns.
- Rising energy costs will make affordability a key concern, with many seeking cheaper or alternative heating solutions.
- More pressure on energy companies to balance profitability with fair pricing.

Personal Life Changes & Adaptation

- Starting a family, moving home, aging relatives.
- Health-related priorities (mental health, aging, chronic illness).
- Career shifts, retirement, and financial planning.

Energy Transition & Environmental Concerns

- Sustainability and Net Zero goals will be a priority, with a faster shift away from fossil fuels.
- The impact of environmental policies will support a growing role of solar, EV charging, and other green solutions.

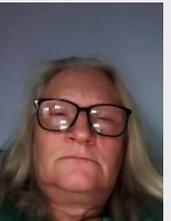
Technology & Infrastructure Evolution

- Smart homes, automation, and digital
- Wearable tech, hybrid work models

Global & Political Uncertainty

- Impact of inflation, government regulations, and global conflicts creating economic instability and affecting energy costs and accessibility.
- Adapting to unpredictable global events like pandemics and wars.

V17 – Retiring – will need a reliable service



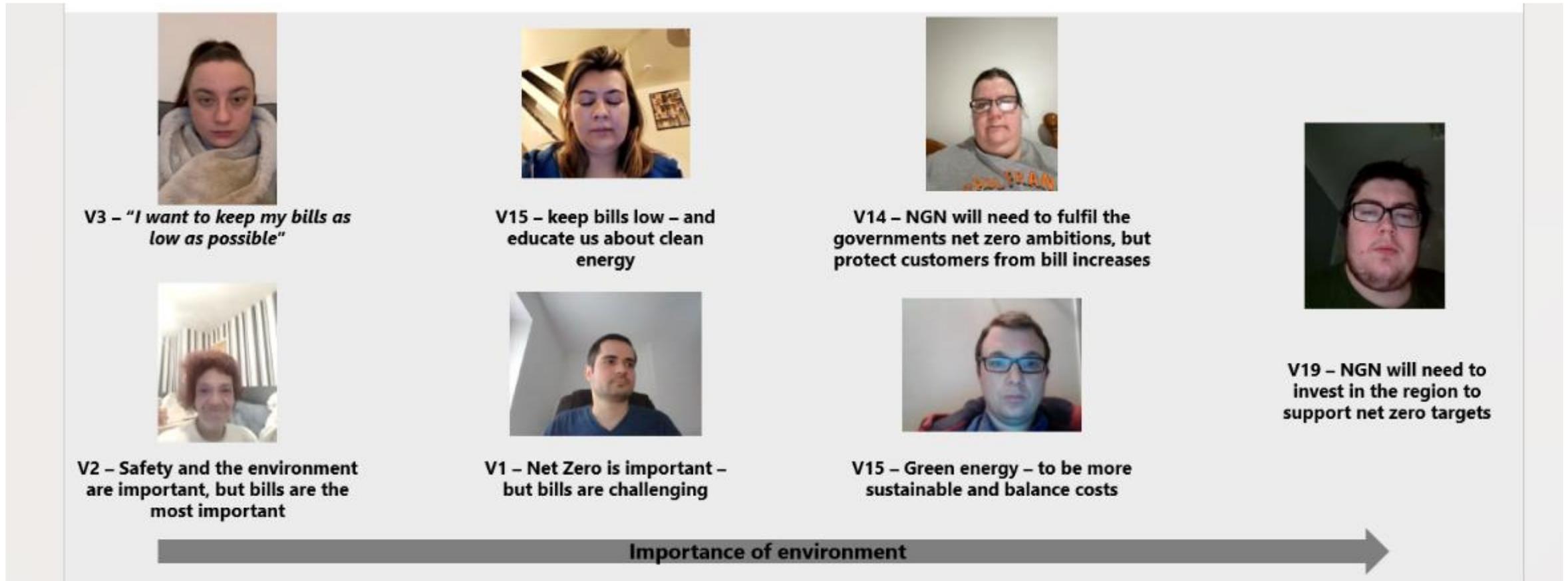
Customer priorities

How will priorities change in the next 5 years?

3

NEW QUESTION

A definite tension between the need to keep costs low, but support net zero ambitions. 18/20 customers who created a video mention cost as a concern



In the survey, we asked you to tell us what you thought should be a priority for Northern Gas Networks. As a reminder, you indicated the following areas as your top 3 priorities. [INSERT TOP 3 PRIORITIES]. Please tell us more about how you think your priorities might change over the next five years?

Customer priorities

How will priorities change in the next 5 years?

3

NEW QUESTION

Other customers mention the importance of safety and reliability, or helping those who need it, but cost remains key.

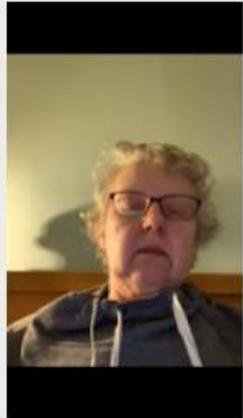
Cost and safety



V5 – Cost is important, but so too is safety and reliability



V7 – Keep everyone safe and keep the costs down



V13 – Safety (colleagues and customers) but nobody should have to chose between heating and eating

Support those who need it



V10 – Reliable service and support those who need it



V6 – Concentrate on costs and safety, help those people who need it. Customer service also important – what will you do when things go wrong?

Customer priorities

Life events and impact on NGN priorities

3

NEW QUESTION

Overall

The most common life event in the past year is a change in household income and expenditure.

Have any of the following happened to you over the past year



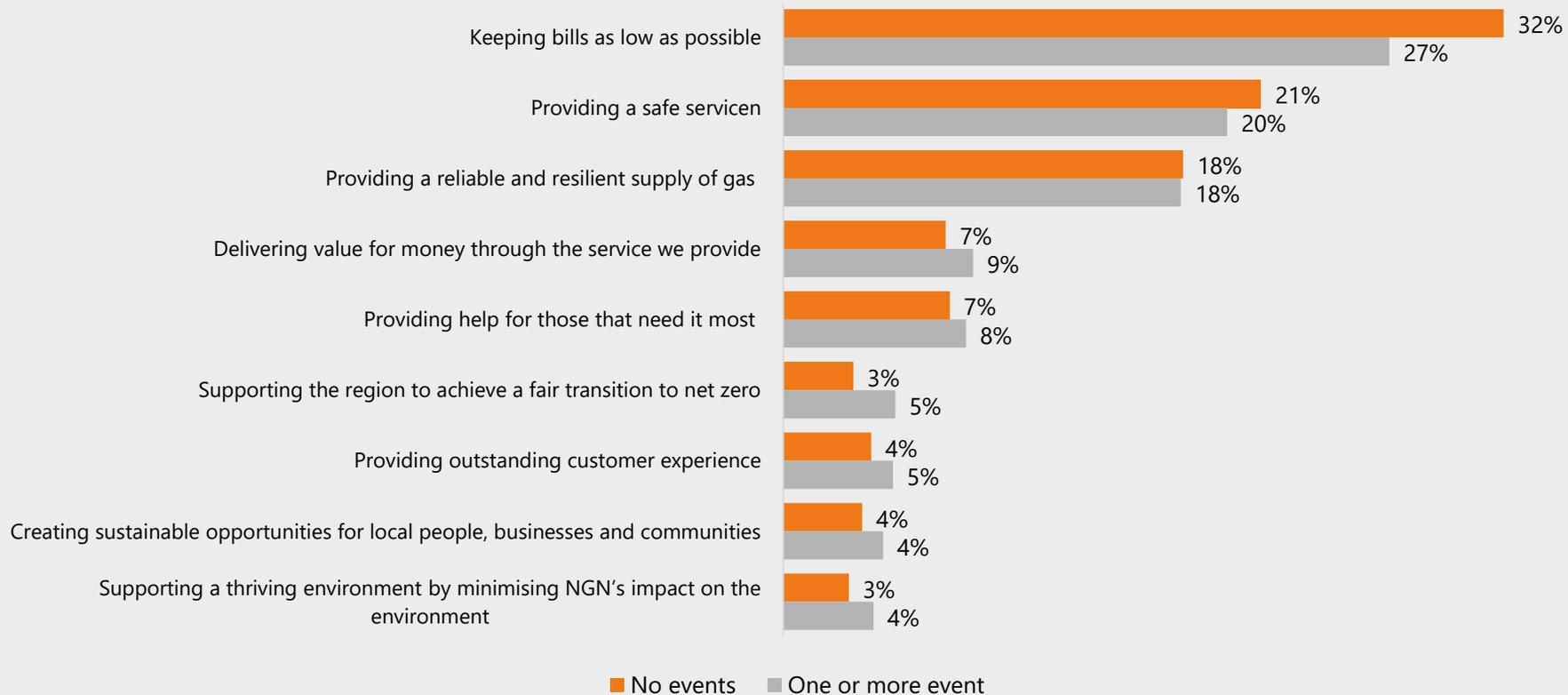
Customer priorities

Life events and impact on informed NGN priorities

3

NEW QUESTION

Whether any life event happened over the past year by informed priorities



Customer priorities

Life events impact on NGN priorities

3

NEW QUESTION

Those who have experienced a change in household income or become more concerned about environmental issues are more likely to think their priorities for NGN will change in the next 5 years.

Events that have happened over the past year by whether priorities for NGN are likely to change over next 5 years

	Are priorities for NGN likely to change over next 5 years				
	All customers	Yes, significantly (239)	Yes, slightly (426)	No, they will stay the same (562)	Don't know (195)
Experienced a change in household income or expenses	27%	42% ↑	27%	24%	20%
Became more aware of or concerned about environmental issues	20%	28% ↑	24%	17%	7%
Developed health concerns or experienced a significant illness	17%	20%	16%	16%	18%
Experienced a supply interruption (e.g., electricity, gas, or water)	16%	19%	15%	17%	14%
Experienced job insecurity or a change in employment status	12%	18%	12%	10%	9%
Purchased a home or moved to a new location	9%	14%	11%	7%	6%
Experienced an accident or injury	9%	10%	9%	8%	13%
Became a carer for a loved one who is vulnerable	9%	12%	9%	7%	10%
Started volunteering or participating in community initiatives	7%	12%	9%	6%	3%
Retired or planning to retire soon	6%	5%	7%	5%	6%
Had children leave home (e.g., becoming an empty nester)	4%	5%	4%	3%	3%
None of these happened over the past year	36%	20%	30%	42%	47%

Customer priorities

Life events and impact on NGN priorities

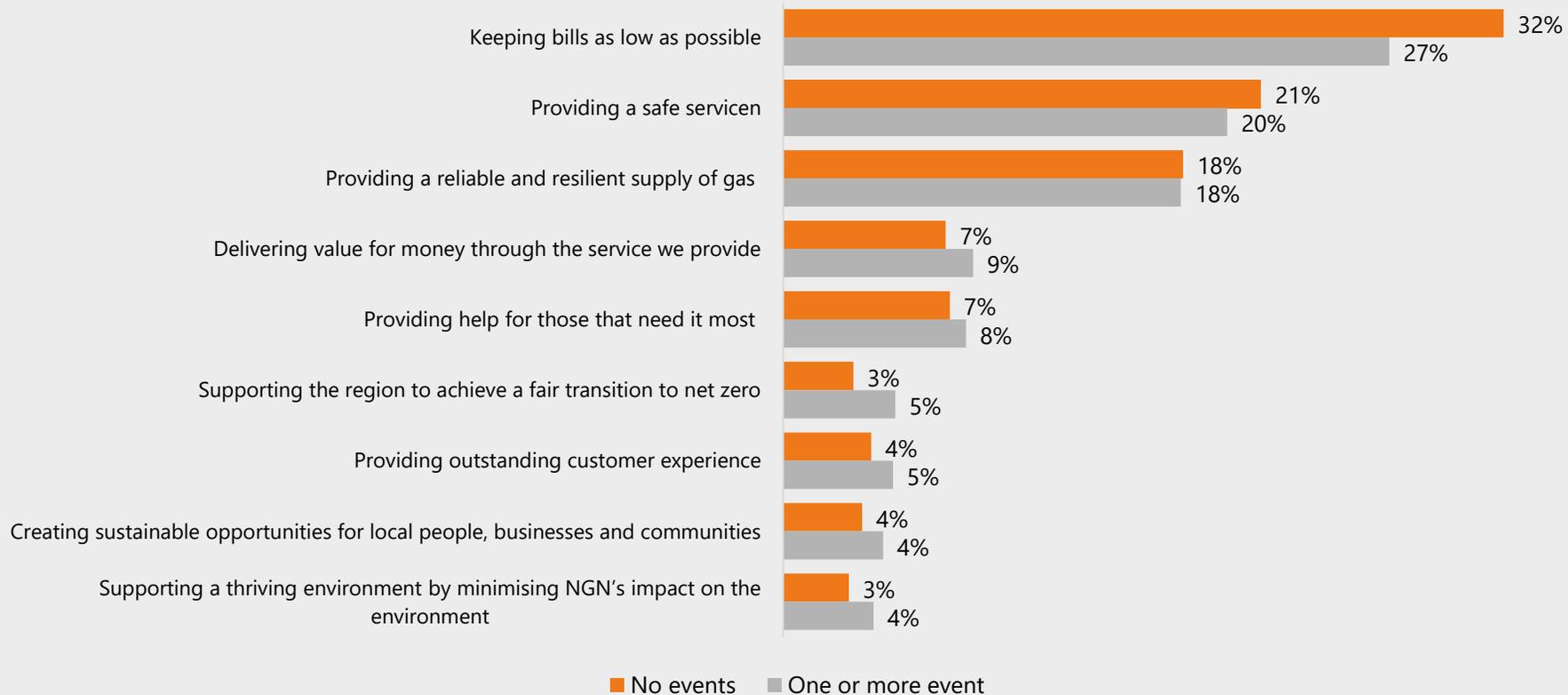
3

NEW QUESTION

Overall

Key findings here.
Key findings here.

Whether any life event happened over the past year by informed priorities



Customer priorities

Life events and impact on NGN priorities

3

NEW QUESTION

Overall

Key findings here.
Key findings here.

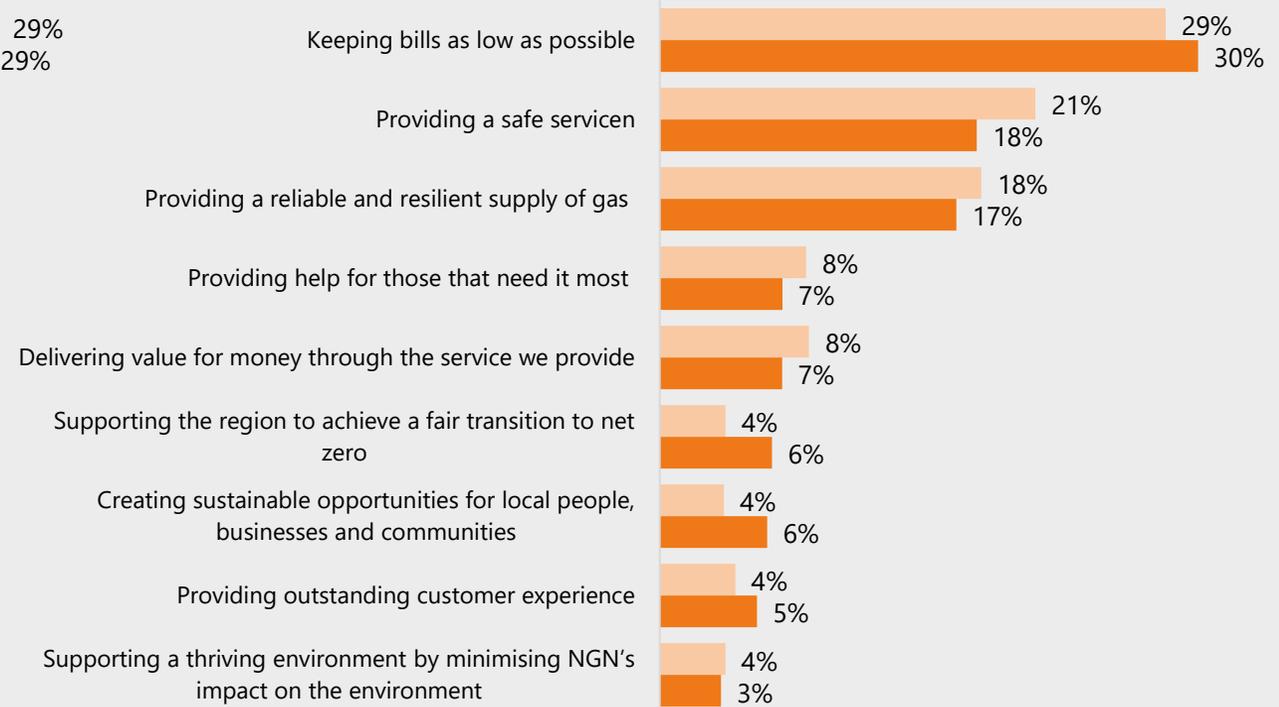
Whether any life event happened over the past year by informed priorities (Most important)

Financial Event



Not financial event Financial event

Family Event



No family event Family event

Customer priorities

Life events and impact on NGN priorities

3

NEW QUESTION

Overall

Those who have become more concerned about the environment place more priority on supporting the region with net zero goals and comparatively less on keeping bills low

Whether any life event happened over the past year by informed priorities (Most important)

Environmental Event



■ No Environmental event ■ Environmental event

Health Event



■ No health event ■ Health event

Sustainability commitments

4

1

Customers continue to prioritise access to affordable energy solutions. A new commitment introduced in 2025—to provide information, funding, and affordable energy for customers and vulnerable communities—has been well received, ranking second in importance among domestic customers.

2

This aligns with NGN's GD3 commitment to expanding awareness and education on a broader range of GD3 topics, including affordability (energy efficiency) and Net Zero (energy transition), while collaborating with partners to drive meaningful impact.

3

Business and Future customers see NGN eliminating their emissions to be a net zero business as the second most important priority.



Sustainability commitments

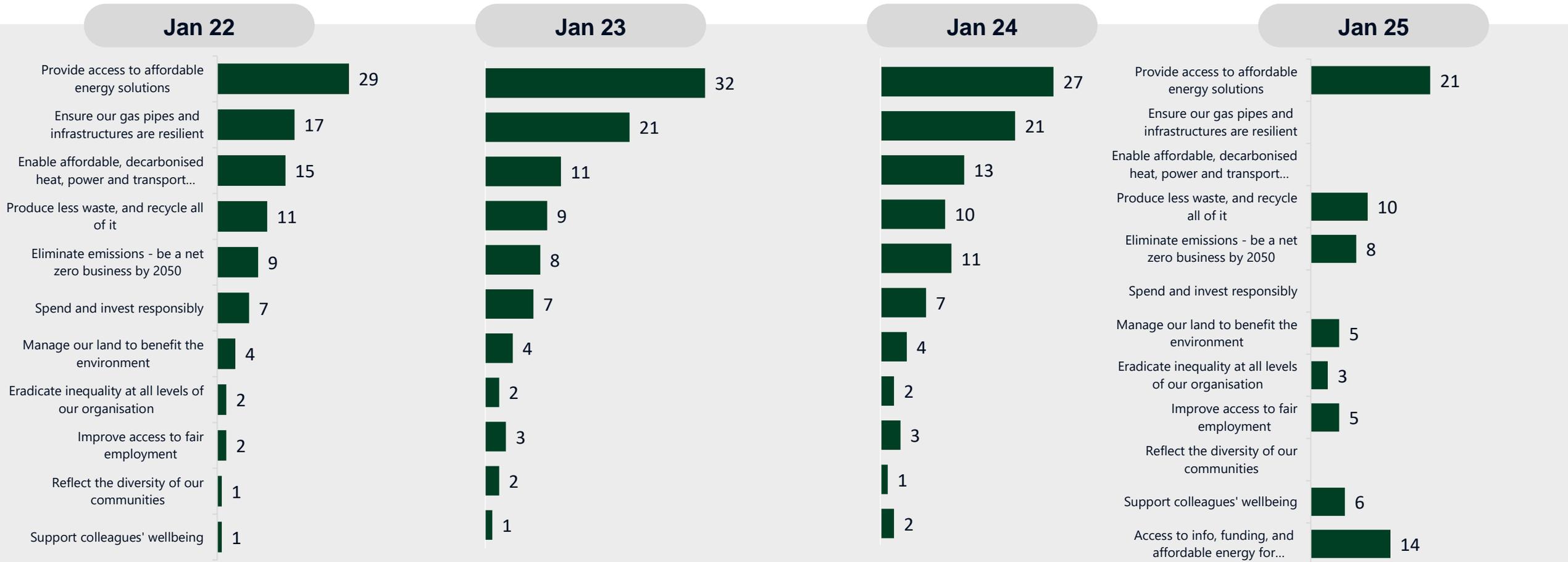
NGN's sustainability commitments

4

Customers continue to most value access to affordable energy solutions. A new commitment added in 2025, to provide access to information /funding and affordable energy for customers/vulnerable communities is also popular, ranked second

TRACKING QUESTION(S)

Data for Jan 25 has been weighted to the number of statements in previous waves to provide a comparison.



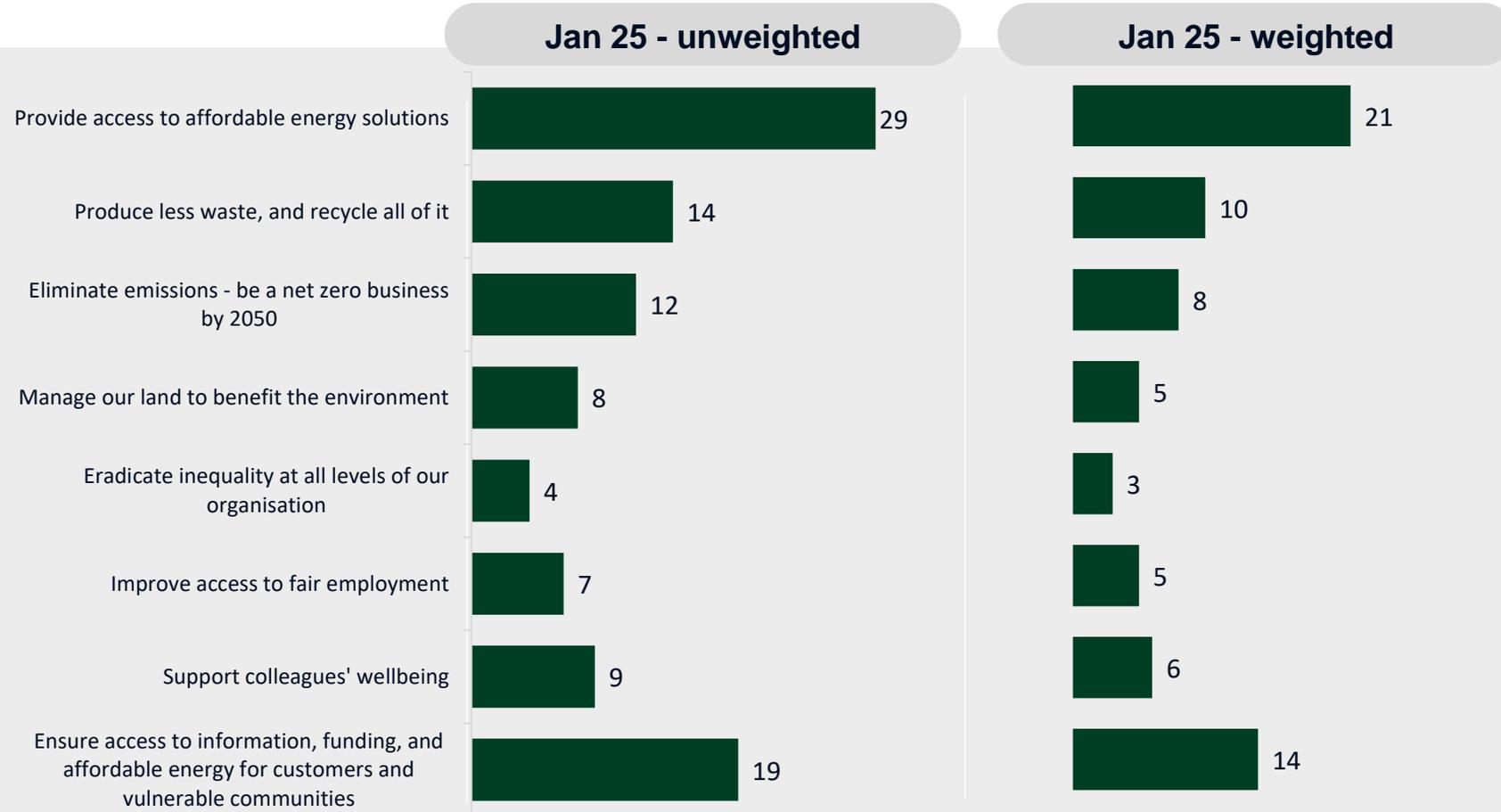
Sustainability commitments

NGN's sustainability commitments

4

TRACKING QUESTION(S)

Data for Jan 25 has been weighted to the number of statements in previous waves to provide a comparison.



Sustainability commitments

4

NGN's sustainability commitments

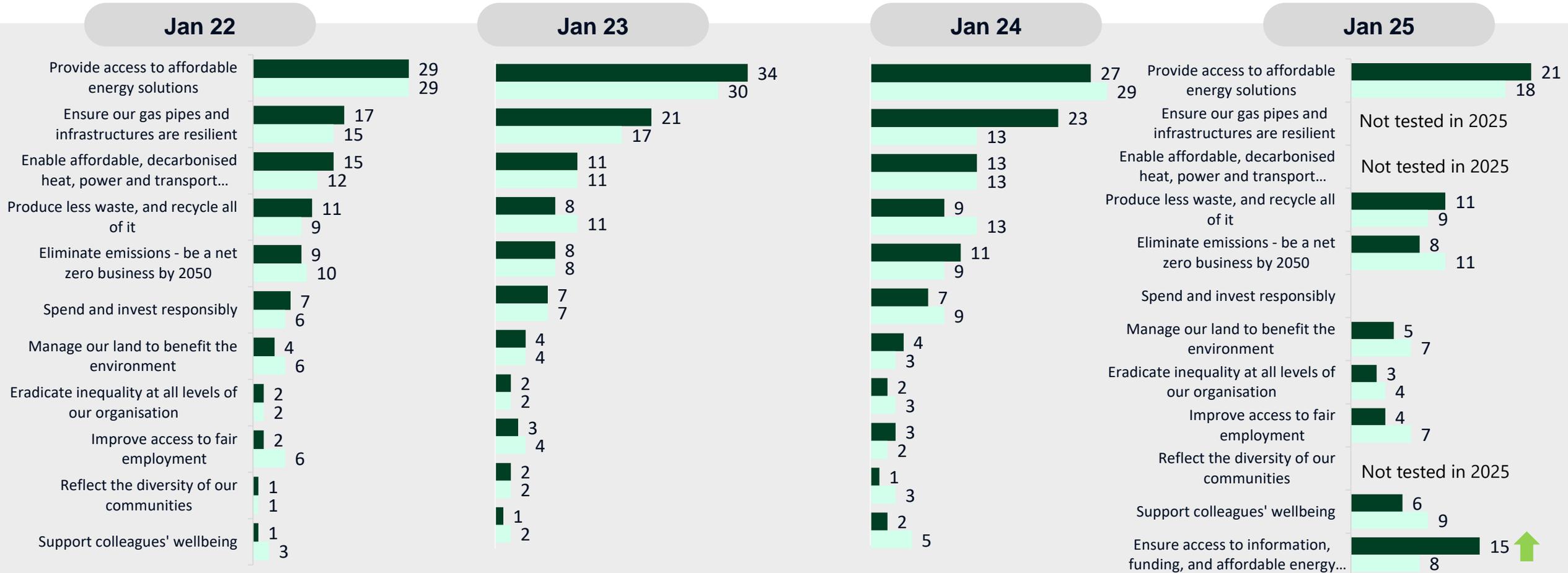
Providing access to information /funding and affordable energy for customers/vulnerable communities is more popular among domestic customers.

TRACKING QUESTION(S)

Data for Jan 25 has been weighted to the number of statements in previous waves to provide a comparison.

Domestic

Business



Q18. 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 , Weighted base; wave 5: 1,423, Domestic: 1223, Business: 200) **New question in wave 2**

Significantly higher/lower than total

Sustainability commitments

NGN's sustainability commitments

4

Results have been weighted to enable comparison with previous waves. YIC completed the ranking in a different way, results included for context and not directly comparable

TRACKING QUESTION(S)

YOUNG INNOVATION COUNCIL

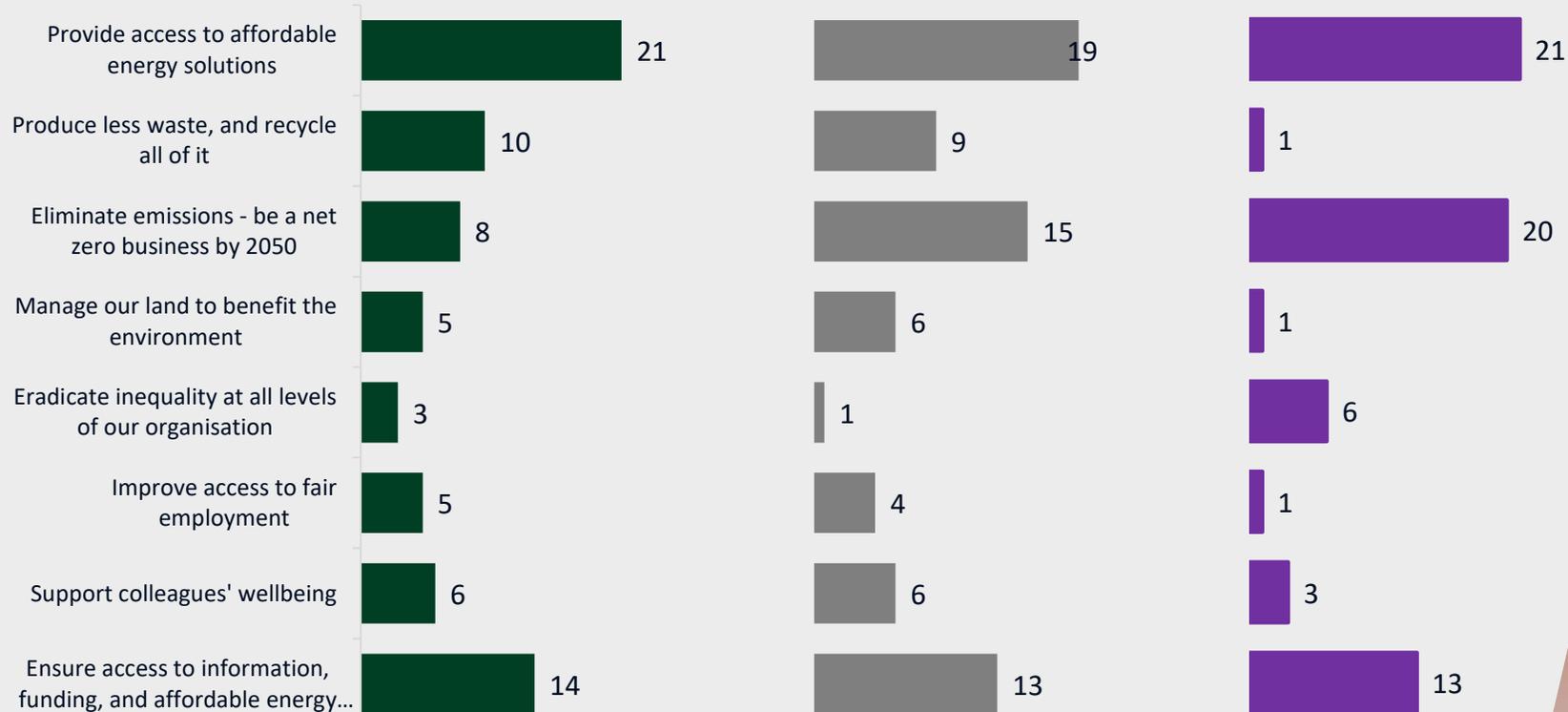
Future customers (YIC and survey) also rate access to affordable energy solutions as most important, closely followed by NGN eliminating their emissions

Domestic

Future customers

YIC

Jan 25



Q18. Please look at the list of commitments and choose the 3 commitments you would most like NGN to prioritise: First commitment) (wave 5: Total: 1423, Domestic: 1223, Future customers : 69, YIC: 47)



Sustainability commitments

NGN's sustainability commitments

4

TRACKING QUESTION(S)



Age – Jan 25 Domestic

	Age			
	18-29	30-49	50-69	70+
Enable affordable, decarbonised heat, power and transport	23%	19%	22%	22%
Produce less waste and recycle it all	7%	11%	11%	13%
Eliminate air pollutant emissions and reach net zero by 2050	10%	8%	7%	8%
Manage our land to benefit the environment	6%	6%	5%	4%
Build a diverse workforce and eliminate inequality	4%	6%	1%	0%
Enhance access to opportunities and fair jobs	5%	6%	4%	2%
Enhance colleague safety and wellbeing	5%	5%	7%	6%
Ensure access to information, funding, and affordable energy for customers and vulnerable communities	13%	12%	17%	17%

PSR Eligible – Jan 25 Domestic

	PSR Eligible	
	No	Yes
Enable affordable, decarbonised heat, power and transport	23%	20%
Produce less waste and recycle it all	12%	10%
Eliminate air pollutant emissions and reach net zero by 2050	8%	8%
Manage our land to benefit the environment	5%	5%
Build a diverse workforce and eliminate inequality	2%	3%
Enhance access to opportunities and fair jobs	5%	4%
Enhance colleague safety and wellbeing	6%	6%
Ensure access to information, funding, and affordable energy for customers and vulnerable communities	11%	17%

SEG – Jan 25 Domestic

	SEG			
	AB	C1	C2	DE
Enable affordable, decarbonised heat, power and transport	22%	22%	20%	21%
Produce less waste and recycle it all	9%	13%	11%	8%
Eliminate air pollutant emissions and reach net zero by 2050	9%	7%	9%	8%
Manage our land to benefit the environment	5%	6%	4%	4%
Build a diverse workforce and eliminate inequality	4%	4%	1%	3%
Enhance access to opportunities and fair jobs	5%	3%	6%	4%
Enhance colleague safety and wellbeing	6%	6%	6%	6%
Ensure access to information, funding, and affordable energy for customers and vulnerable communities	13%	12%	15%	18%

Digital status – Jan 25 Domestic

	Digital status		Bills	
	Digitally disengaged	Online	Pay without difficulty	Constant struggle / fall behind
Enable affordable, decarbonised heat, power and transport	12%	22%	23%	20%
Produce less waste and recycle it all	14%	10%	12%	9%
Eliminate air pollutant emissions and reach net zero by 2050	6%	8%	10%	7%
Manage our land to benefit the environment	6%	5%	5%	5%
Build a diverse workforce and eliminate inequality	1%	3%	2%	4%
Enhance access to opportunities and fair jobs	6%	4%	3%	6%
Enhance colleague safety and wellbeing	9%	6%	7%	5%
Ensure access to information, funding, and affordable energy for customers and vulnerable communities	20%	14%	11%	18%

Sustainability commitments

Information on historic ground pollution

4

NEW QUESTION

Almost half of all customers would like NGN to make targeted improvements to address historic ground pollution.

Jan 25

NGN currently supply customers with natural gas, but prior to the 1970s gas was made from coal in towns and cities across their region.

This process was not done to the environmental standards of today and as a result, some of the land which NGN owns has the potential for historic ground pollution which could be damaging to the environment.

Managing this pollution could affect both the environment and customer bills, as well as influence how NGN prioritises other investments.

What approach do you think NGN should consider when deciding how to address historic ground pollution, and how should they balance environmental protection, customer costs, and investment priorities?

Take no action
5%

Prevent further
harm
31%

Make targeted
improvements
46%

Fully restore the
land
18%

Male 23% vs Female 39%

Male 25% vs Female 11%

Future energy & heating systems **5**

1

Customers want input on local heating system choices and believe decisions should be made at a local level. However, their knowledge of upcoming changes is limited. While 75% of domestic customers know heating systems will change, almost 20% state they have limited or no knowledge about transitioning to low-carbon options and potentially phasing out natural gas.

2

Awareness of new technologies is highest for heat pumps, but perceptions remain mixed—despite familiarity, fewer than half view them positively.

3

There is little resistance to hydrogen for industrial use (7% find it unacceptable), but around 50% have concerns about home use.

4

These findings support NGN's plans to enhance net-zero education, with three-quarters of customers agreeing NGN should inform the public about energy options. Without an increase in knowledge and awareness, behaviour change will be more limited, potentially leading to greater resistance.

Future energy & heating

Future of heating (spontaneous awareness)

5

TRACKING QUESTION(S)

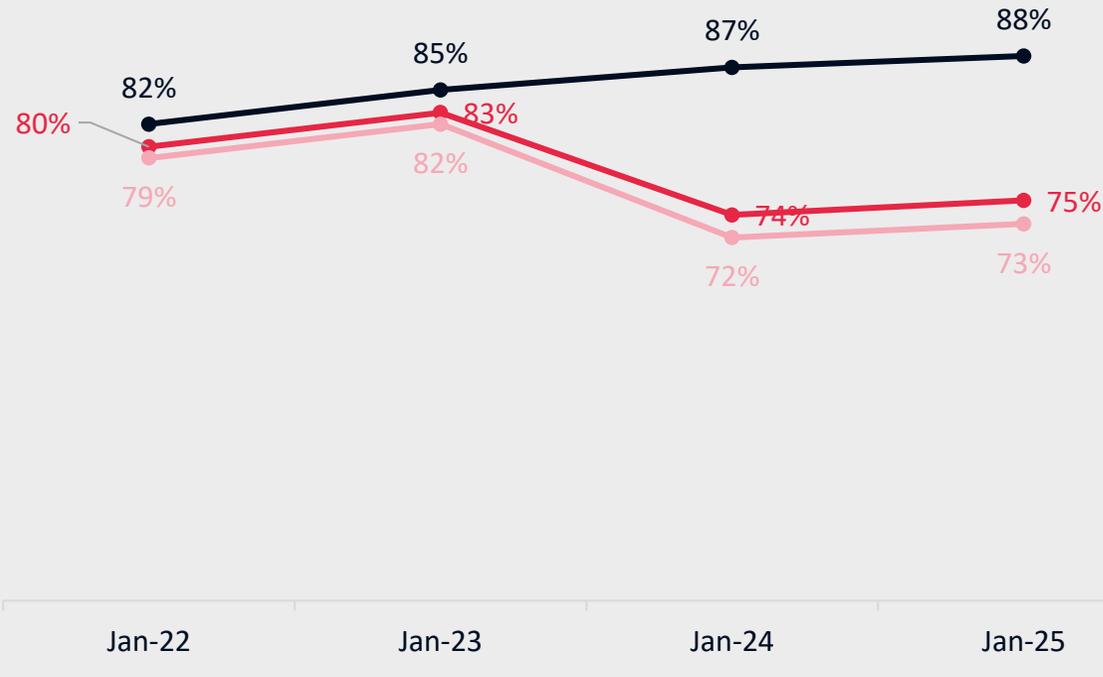
Total

Domestic

Business

Business customers continue to be more aware that **the way people in the UK heat their homes and business is likely to change in the next 10 years**, with awareness gradually increasing overtime. Just under $\frac{3}{4}$ of domestic customers are also aware.

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



Summer 2024 – 88% of people said they were aware of the need to change the way homes and buildings are heated in order to reach the Net Zero target. Knowledge levels have remained broadly stable over time, with 39% saying they knew a lot or a fair amount (Public Attitudes Tracker)

Future energy & heating

Future of heating (prompted)

5

NEW QUESTION

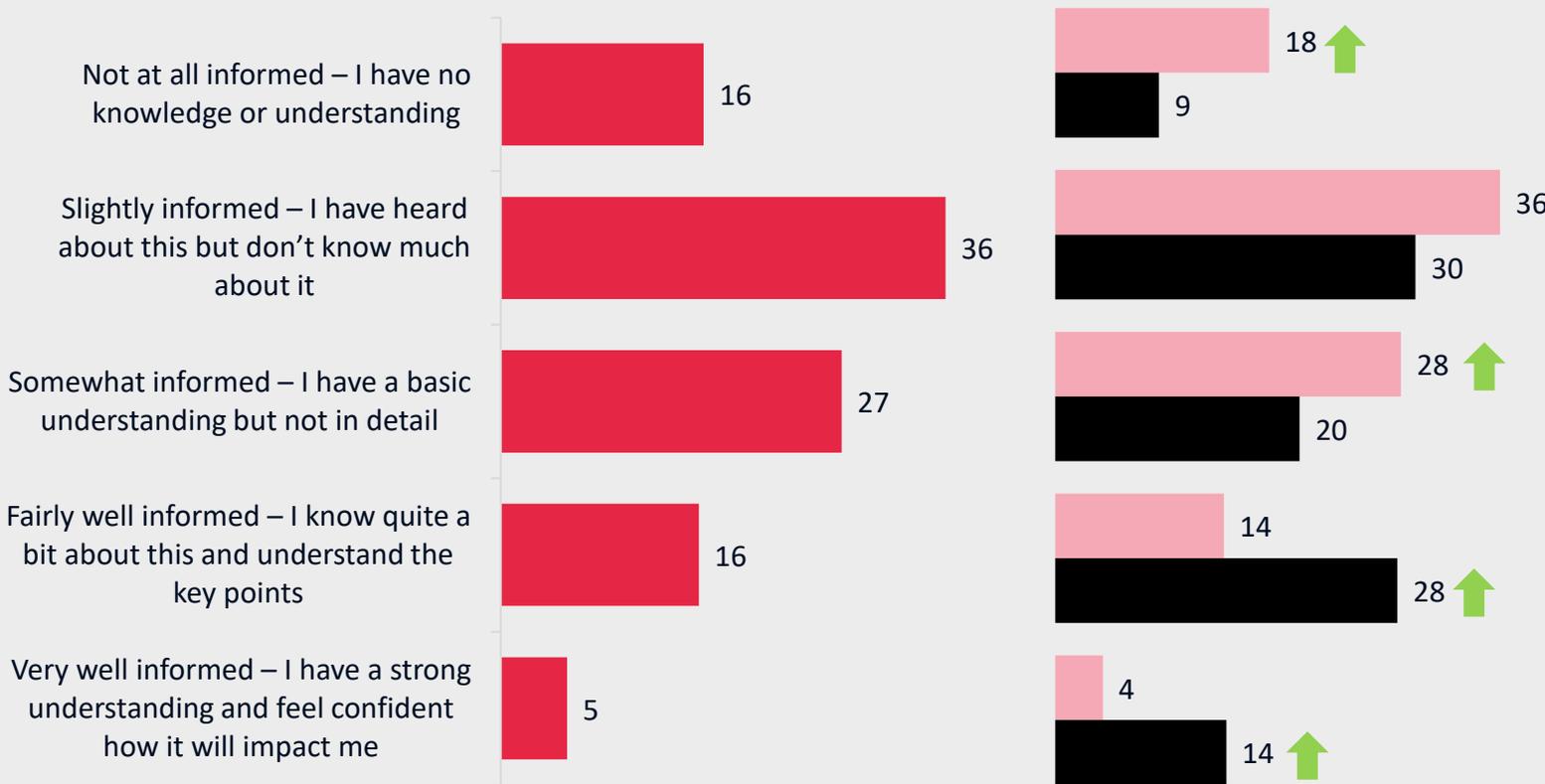
Total

Domestic

Business

However, when prompted, almost one in five domestic customers claim they have no knowledge or understanding about transition to low carbon domestic heating systems and the potential removal of the natural gas system. Less than 1 in 20 domestic customers claim to feel very well informed.

Jan 25: Use of low carbon heating systems



The UK Government aims to reach Net Zero by 2050. The term Net Zero means achieving a balance between the carbon emitted into the atmosphere, and the carbon removed from it. This balance – or Net Zero – will happen when the amount of carbon we add to the atmosphere is no more than the amount removed. To achieve Net Zero, the use of fossil fuels, including gas, must decrease to cut carbon emissions.

From 2025, it is likely that new homes will use low-carbon heating systems, like heat pumps, instead of gas boilers, under the Warm Homes Plan. Over time, fossil fuels for heating homes and buildings will be phased out and replaced with greener, more sustainable energy solutions.

In the future, some areas may no longer have a natural gas supply and will rely on alternative energy sources. As well as an increased use of electricity for home heating, this could also include repurposing the gas network to supply hydrogen for power and industrial use.

Future energy & heating

Socialisation of costs

5

NEW QUESTION

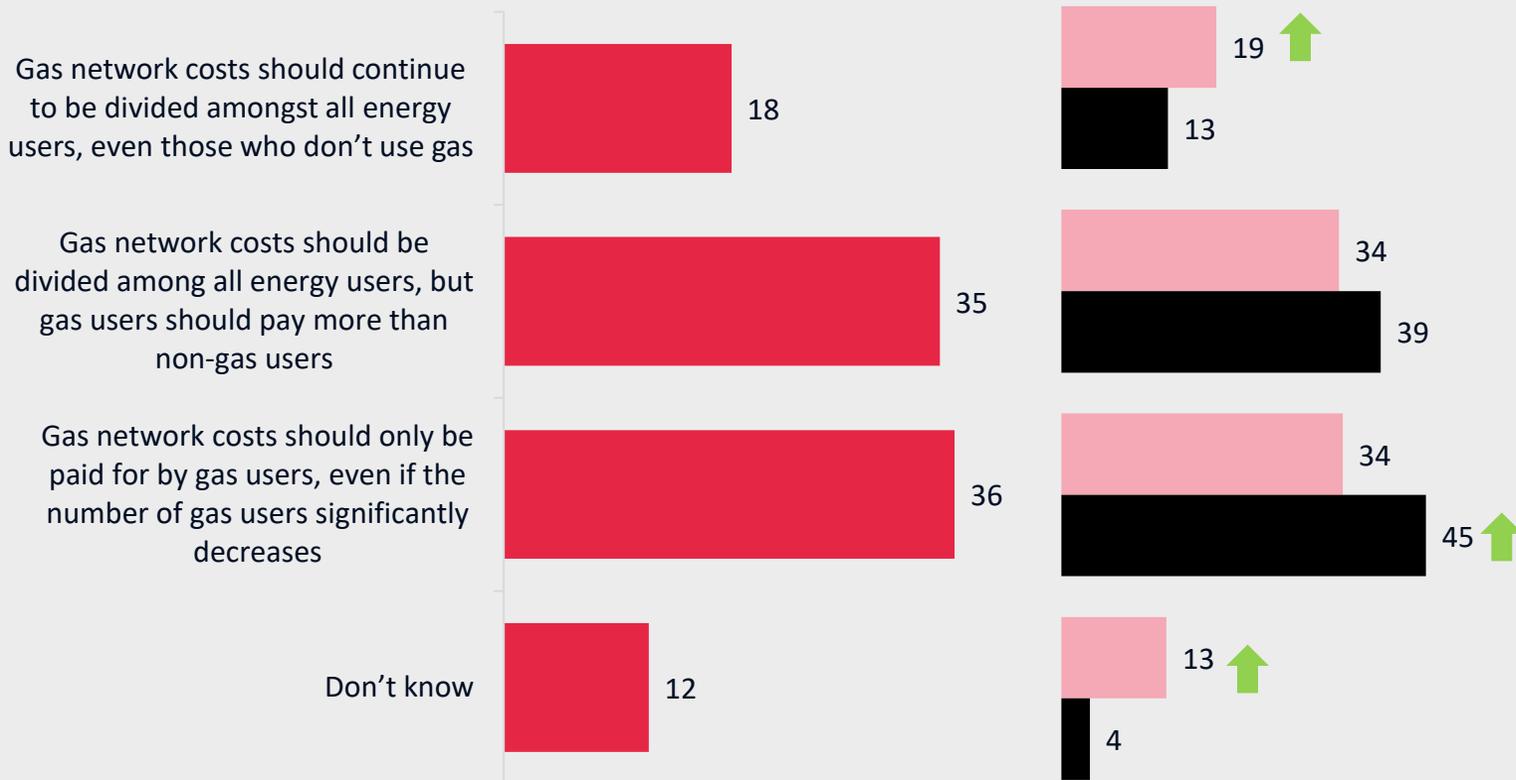
Total

Domestic

Business

Customers are evenly divided on how gas network costs should be shared as usage declines. About a third believe that gas users should pay more to cover these costs, while another third think they should be paid solely by gas users.

Jan 25: Socialisation of gas network costs



Currently, the cost of running, maintaining and distributing gas in the network is shared by all users, including homes and businesses. Costs are allocated proportionally, with heavy industrial and commercial users paying more to support the network.

On average, in 2025 a household gas customer pays £168 per year to support the distribution of gas.

Even if fewer people use the gas network in the future, the costs of running it will stay roughly the same. This means the remaining users might have to pay more, as the costs will be spread across fewer people.

Future energy & heating

Decision about having a gas supply

5

TRACKING QUESTION(S)

Total

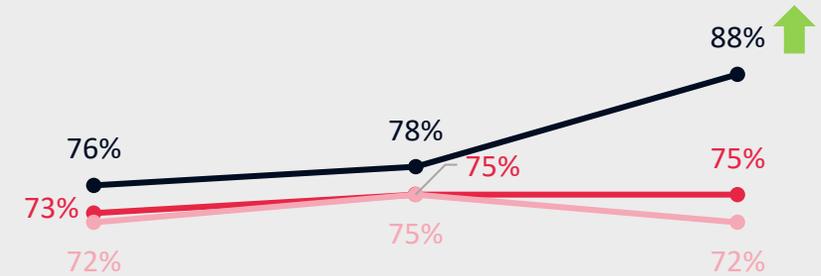
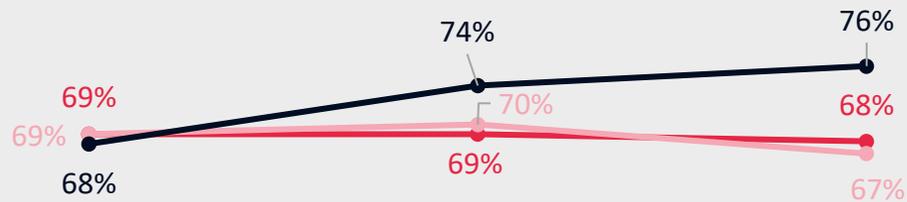
Domestic

Business

The majority of domestic and business customers agree that they would like to have input into the decision about the type of heating system available in their area, and this decision should be made at a local level.

The final decision about the type of heating systems available in my area should be made at a local level, rather than a national level

I want to have a say in the decision about the type of heating systems available in my area



Jan-23

Jan-24

Jan-25

% agree

Jan-23

Jan-24

Jan-25

% agree

Future energy & heating

Decision about having a gas supply

5

TRACKING QUESTION(S)

Total

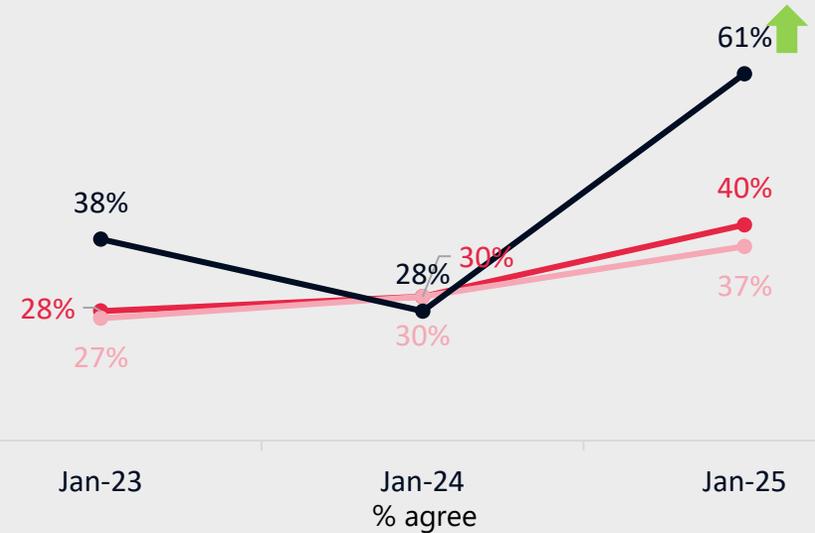
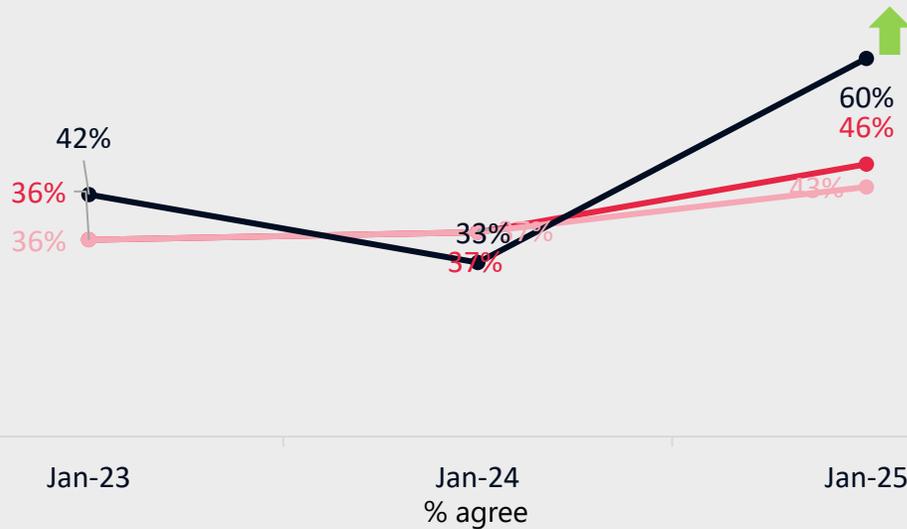
Domestic

Business

Fewer than half of customers are comfortable allowing others to make decisions about local heating systems, and only around a third of domestic customers believe these decisions should be determined at a national level.

I am content to leave the decision about the type of heating systems available in my area to others who know more about it

The final decision about the type of heating systems available in my areas should be made at a national level



Future energy & heating

Awareness and perception of future technology

5

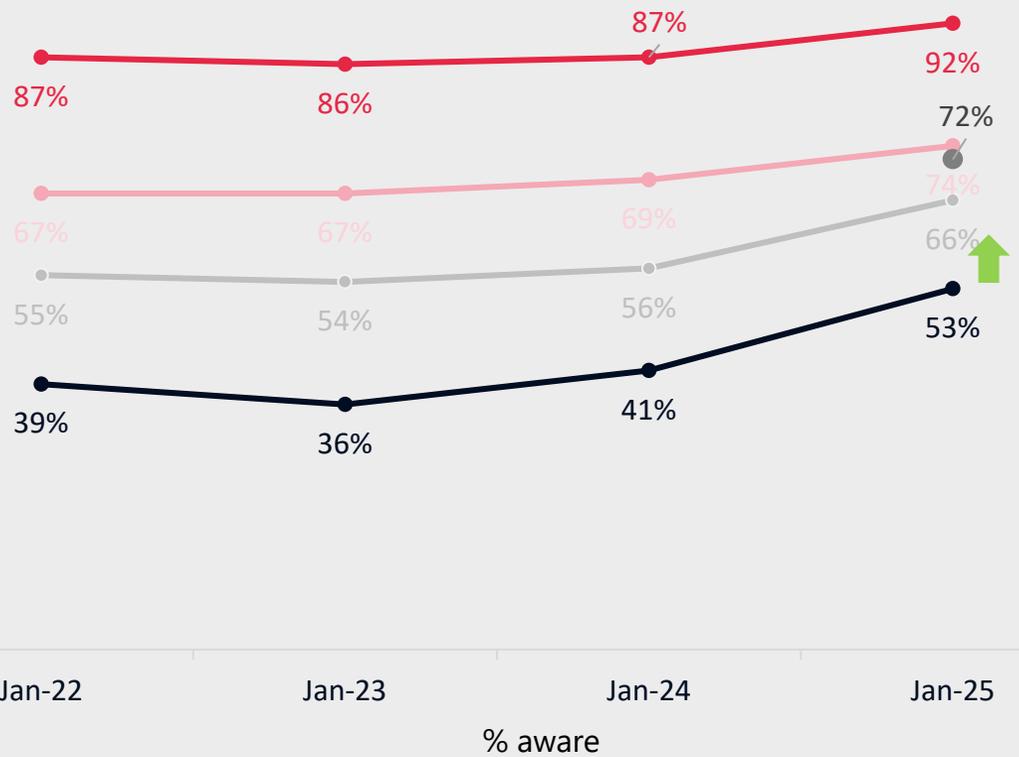
Department for Energy Security & Net Zero
 Summer 2024 – only 24% know a lot or a fair amount about heat pumps (Public Attitudes Tracker)

TRACKING QUESTION(S)

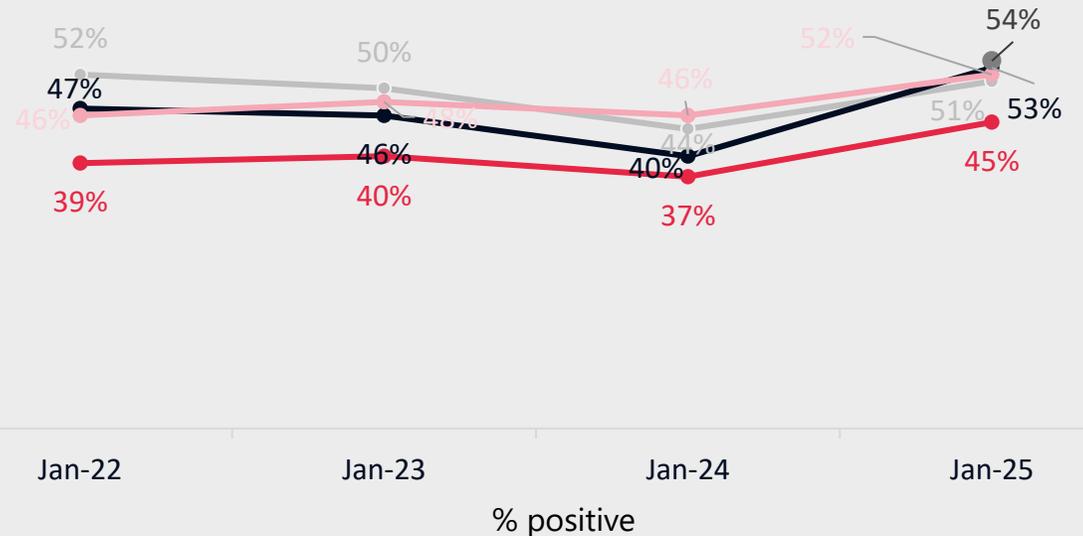
- Heat pumps
- Hydrogen fuelled cars
- Hydrogen boiler
- District heat networks
- Hydrogen in transport

Awareness is highest for heat pumps, followed by hydrogen fuelled cars and hydrogen in transport. Positive sentiment towards all future technology sources tested remains at about half of all customers.

Awareness of future technologies overall



Perception of future technologies overall



Q35/27. Which of the following technologies have you heard of? (wave 2 = 1,124, wave 3: 1,355, wave 4: 711, wave 5: 1423) **New question in wave 2**
 Q35B/Q28. And what is your perception of the following technologies? (only those who were aware) **New question in wave 2**

↑↓ Significantly higher/lower than total

Future energy & heating

Awareness and perception of future technology

5

TRACKING QUESTION(S)

Heat pumps present the largest perception gap—despite relatively high awareness, fewer than half of customers have a positive view of them

Heat pumps

Hydrogen fuelled cars

Hydrogen boiler

District heat networks

Hydrogen in transport

Awareness and Perception of future technologies overall

	Awareness % aware	Perception % positive	Gap
Hydrogen boilers	66%	51%	15%
District heat networks	53%	53%	0%
Heat pump	92%	45%	47%
Hydrogen cars	74%	52%	22%
Hydrogen in transport	72%	54%	18%

Future energy & heating

Hydrogen as a replacement for natural gas

5

NEW QUESTION

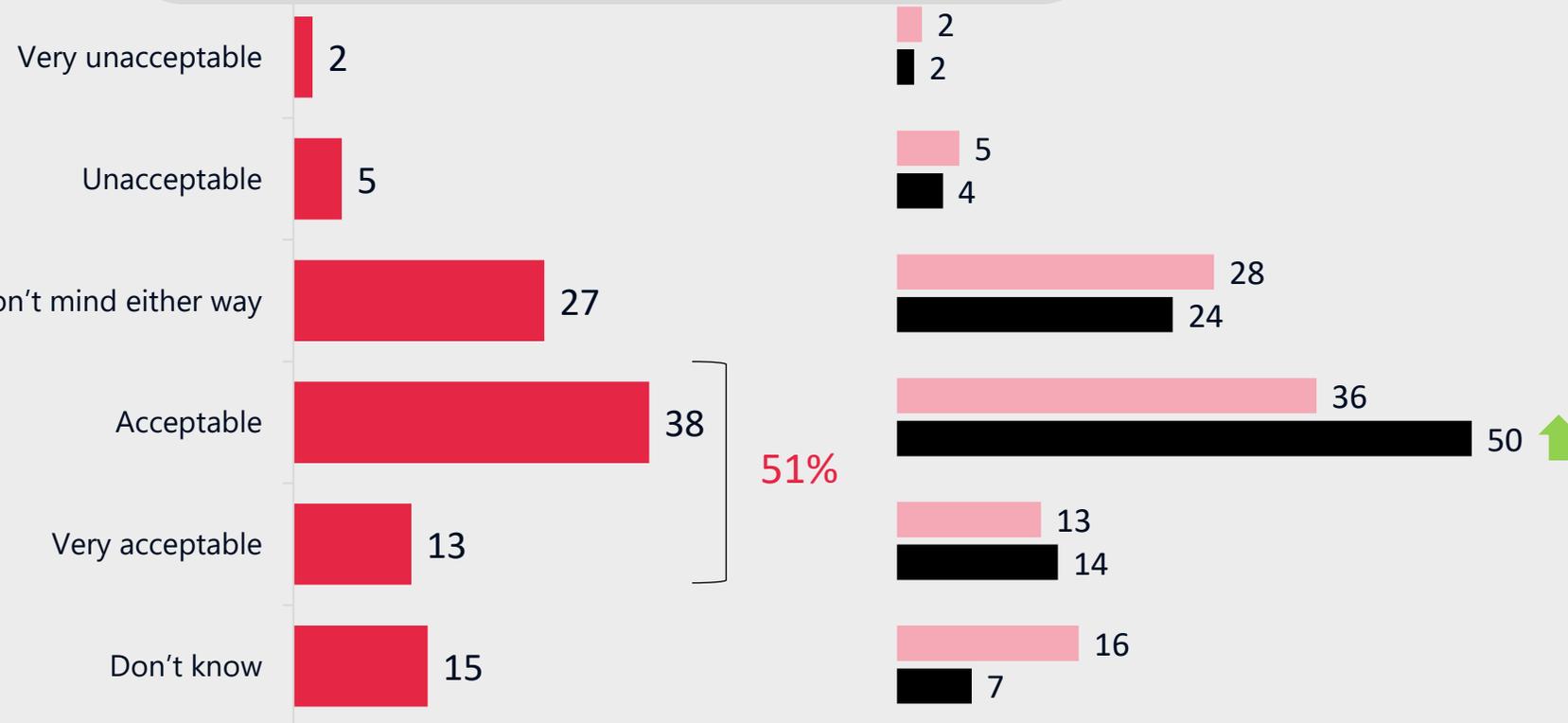
Total

Domestic

Business

Customer are generally accepting of the use of hydrogen for industrial and commercial use, with only 7% finding this unacceptable

Acceptability of hydrogen in community



In the future the current gas and power network might be used to supply low carbon gas like hydrogen, instead of a methane gas, for industrial energy and power but not for home heating.

Please review the question below and indicate your level of acceptance.

Future energy & heating

Hydrogen as a replacement for natural gas

5

★ Extra content added post-debrief

NEW QUESTION

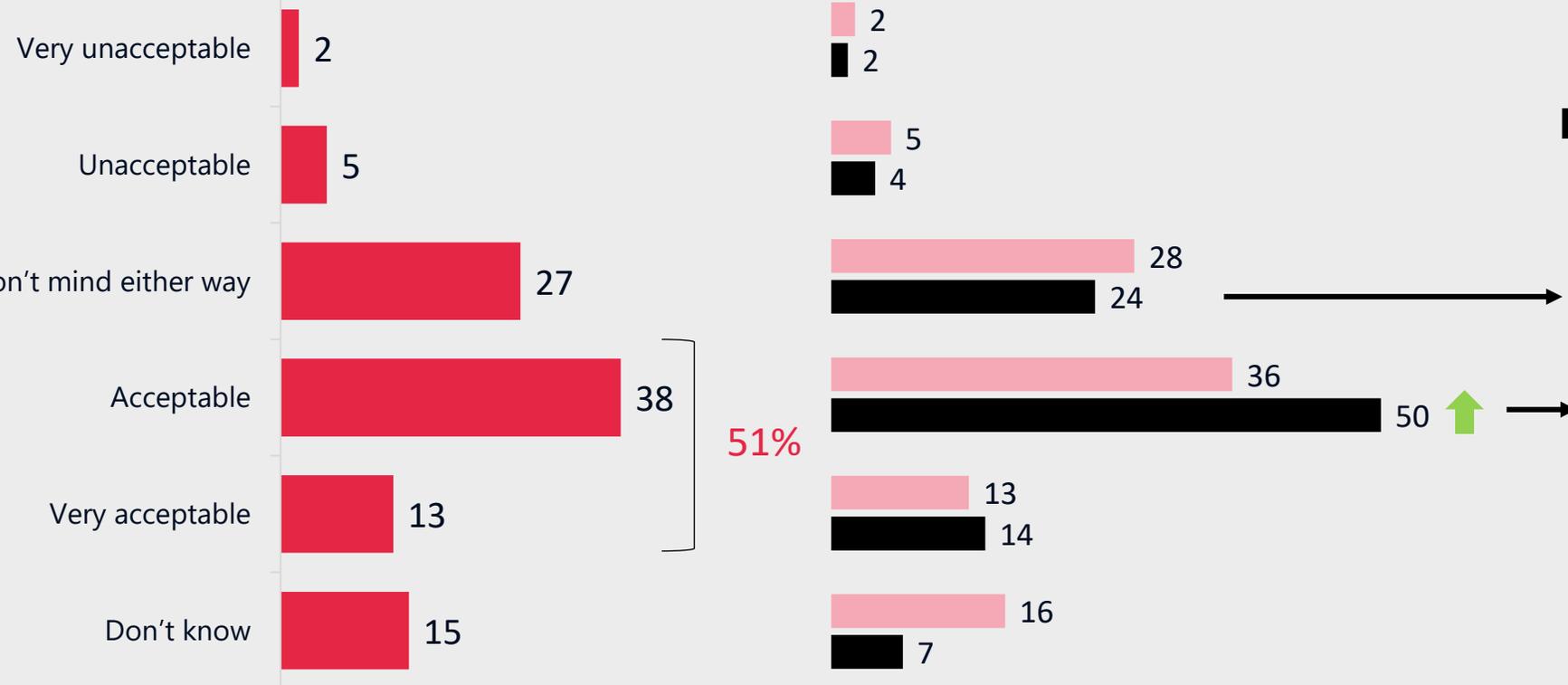
Total

Domestic

Business

Customers are generally accepting of the use of hydrogen for industrial and commercial use, with only 7% finding this unacceptable. Medium-sized businesses are the most accepting, whereas micro/small businesses are more likely to be on the fence.

Acceptability of hydrogen in community



Influence of size of business

Micro/ small (43%)

Medium (63%)

Small (35%)

51%

↑↓ Significantly higher/lower

Future energy & heating

Hydrogen as a replacement for natural gas

5

TRACKING QUESTION(S)

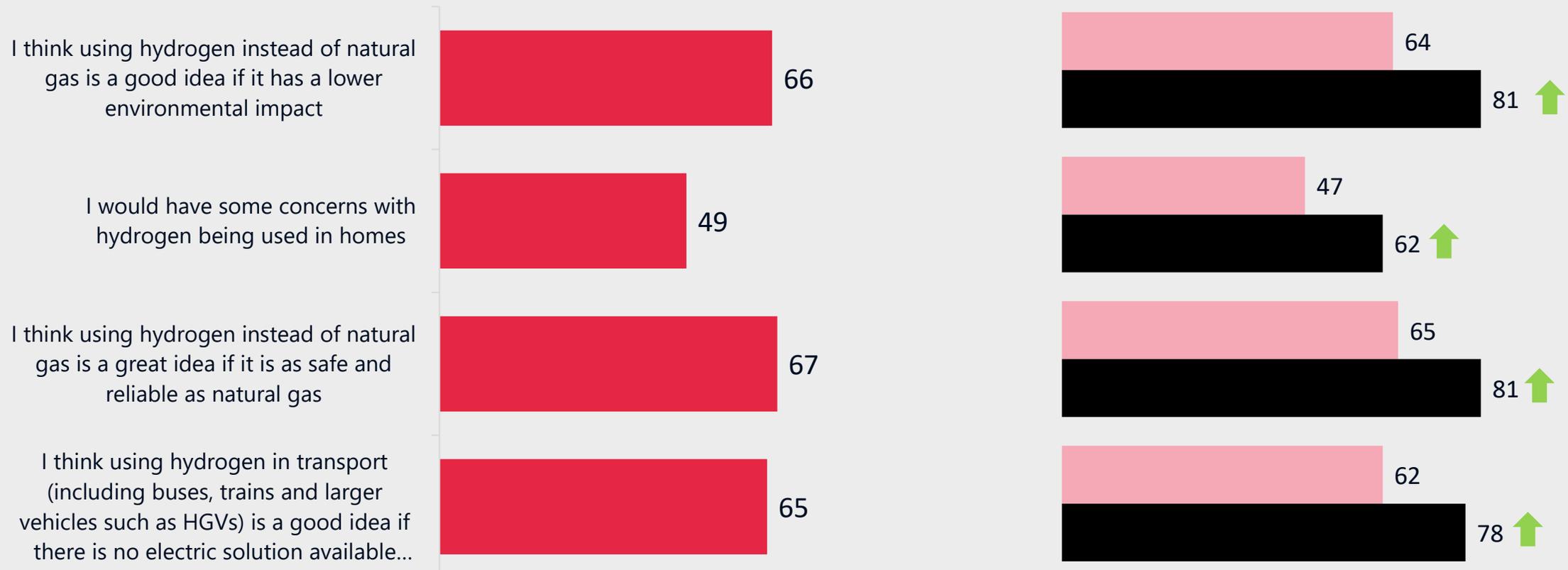
Total

Domestic

Business

Business customers are more informed about potential use of hydrogen and more likely to think is a good idea. They also have higher levels of concerns about the use of hydrogen in homes.

% Agree



Q29. How much do you agree or disagree with the following statements?
Weighted base: wave 5: 1423, Domestic: 1223, Business: 200

↑↓ Significantly higher/lower than total

Future energy & heating

Hydrogen as a replacement for natural gas

5

★ Extra content added post debrief

TRACKING QUESTION(S)

Total

Domestic

Business

Businesses that know NGN very well are much more likely to agree with use of hydrogen across the board.

Business



% Agree

Know them very well (NGN)

I think using hydrogen instead of natural gas is a good idea if it has a lower environmental impact

81

96%

I would have some concerns with hydrogen being used in homes

62

91%

I think using hydrogen instead of natural gas is a great idea if it is as safe and reliable as natural gas

81

98%

I think using hydrogen in transport (including buses, trains and larger vehicles such as HGVs) is a good idea if there is no electric solution available...

78

93%

Future energy & heating

Perception of hydrogen gas

7

TRACKING QUESTION(S)

Total

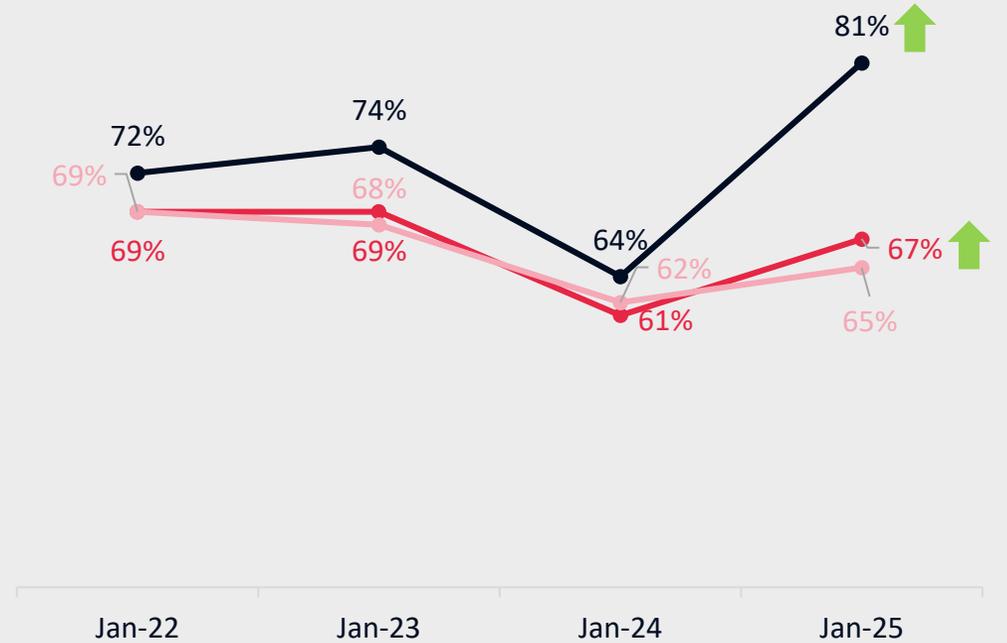
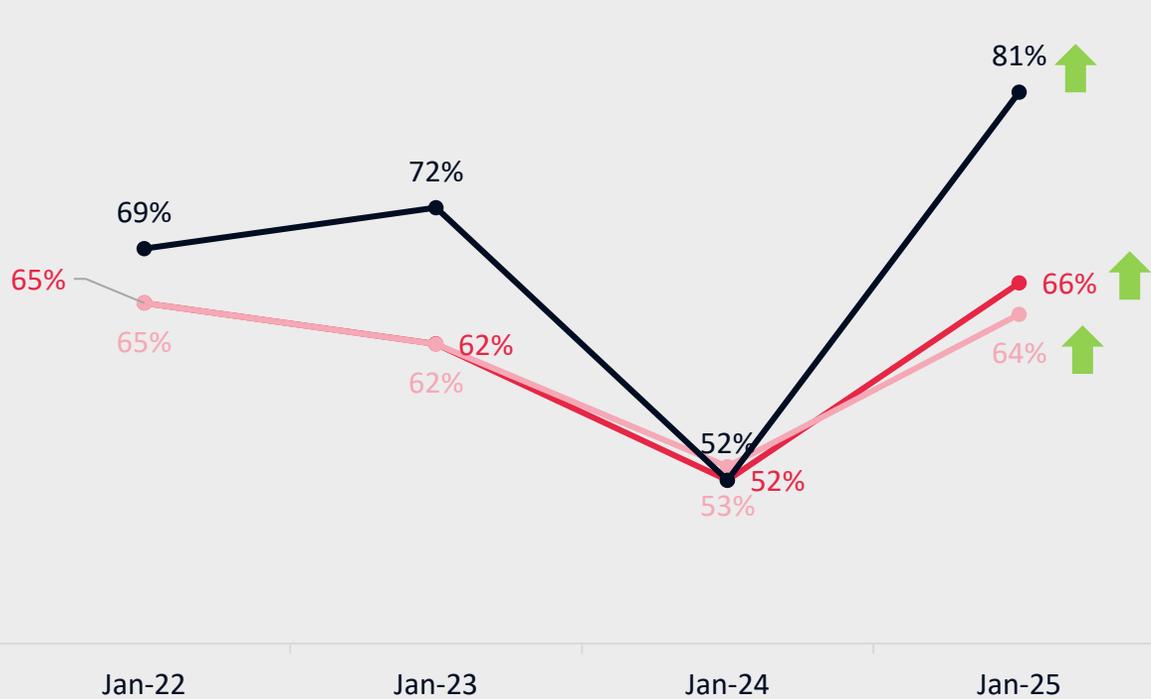
Domestic

Business

Promoting the positive environmental benefits and safety and reliability of hydrogen are likely to improve perceptions.

I think using hydrogen instead of natural gas is a great idea if it has a lower environmental impact

I think using hydrogen instead of natural gas is a great idea if it is as safe and reliable as natural gas



Q29. 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, wave 5: 1423. domestic 1223, business 200)

Significantly higher/lower than previous wave

Future energy & heating

Perception of hydrogen gas

7

TRACKING QUESTION(S)

Total

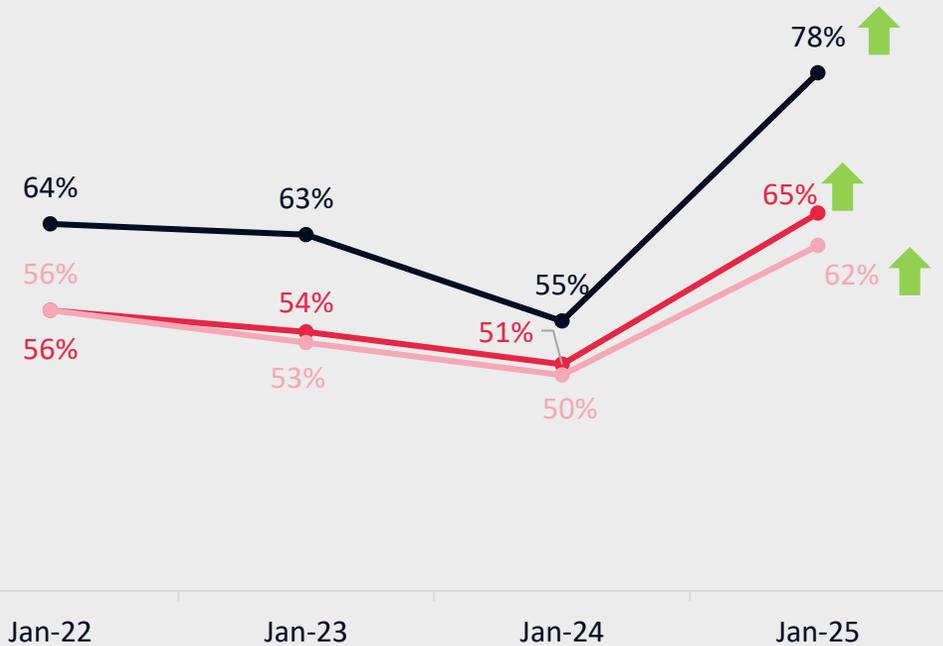
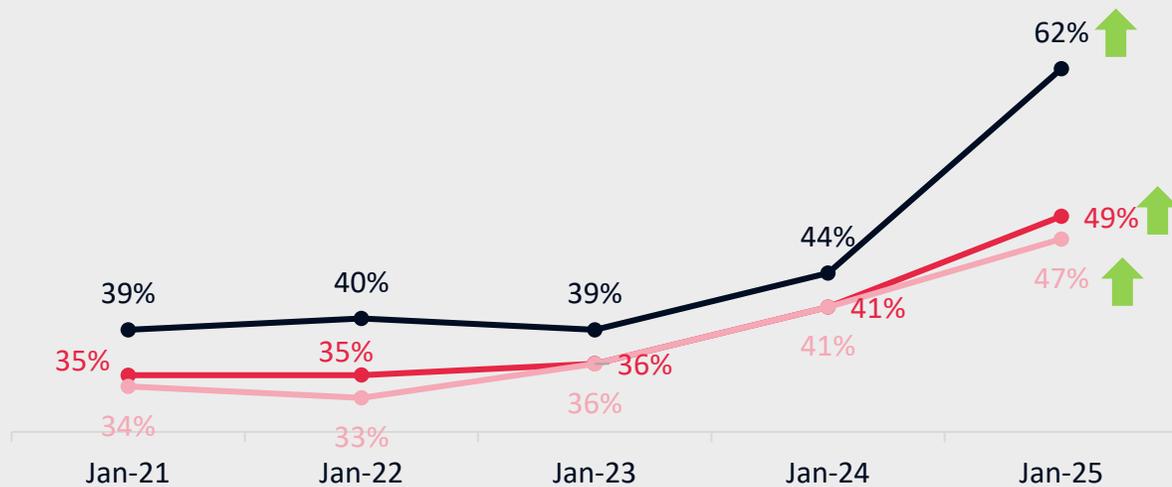
Domestic

Business

Concerns about using hydrogen in homes have increased over time, especially among business customers

I would have some concerns with hydrogen being used in homes

I think using hydrogen in transport (including buses, trains and larger vehicles such as HGVs) is a good idea if there is no electric solution available instead to lower emissions



Future energy & heating

Role of NGN

5

NEW QUESTION

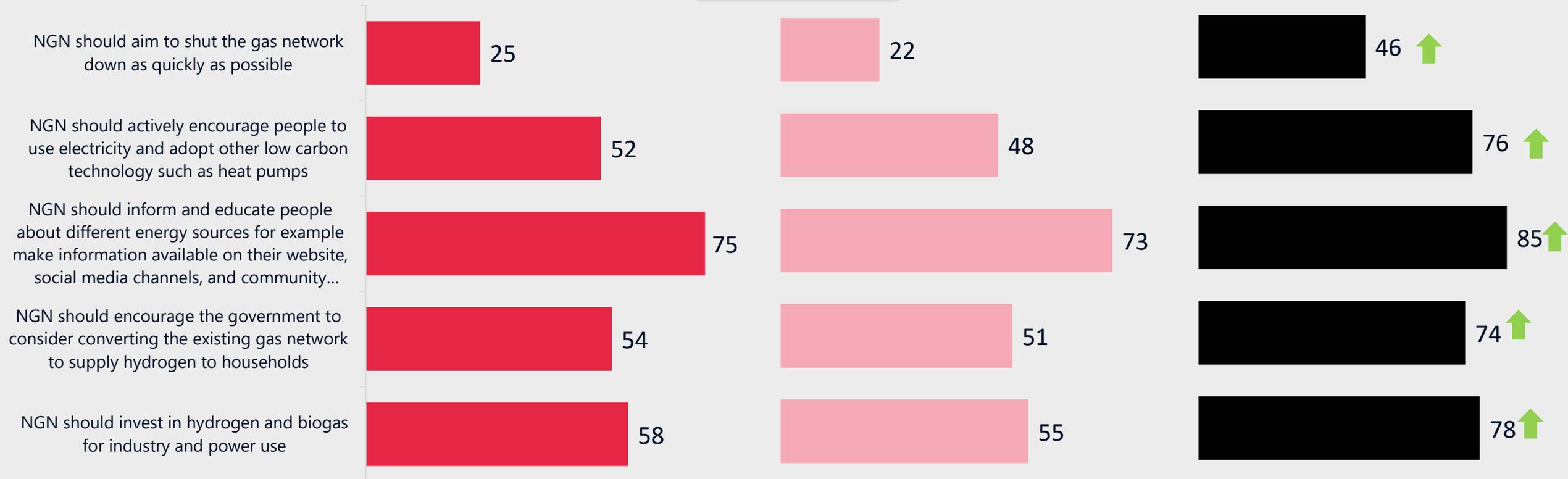
Three quarters of customers agree that NGN should inform and educate people about different energy sources.

Total

Domestic

Business

Jan 25 - % Agree



1

Innovations around energy security are ranked most important by both domestic and business customers, followed by innovations around sustainability.



Customers saw three areas for potential innovation and ranked them from 1 (most important) to 3 (least important).

Sustainability



Innovating how different energy sources (electricity, gas, and liquid fuels) can work together to best contribute to reduced carbon emissions when used in technology, communications, transport, heat, and water. Supporting local authorities, Net Zero teams and community networks to enable Net Zero through strategic energy planning and decarbonised transport, etc

Energy Security



Ensuring a consistent, reliable, and safe supply of gas to meet customer demand, while minimising disruptions caused by infrastructure issues, supply constraints, or external risks such as political factors here and globally or environmental factors including climate change

Technological



For example advanced technology that can listen for gas leaks, finding new ways to replace pipes without digging and using Artificial Intelligence to guide investment decisions.

Innovation

6

NEW QUESTION

Innovations around energy security are ranked most important by both domestic and business customers, followed by innovations around sustainability. Energy security significantly more important for those aged 50+, and directionally more for the digitally disengaged and those eligible for PSR. Sustainability more important for those aged 18-29.

Domestic

Percentage ranked first



Energy Security

56%



Sustainability

29%



Technological

15%



Business

Percentage ranked first



Energy Security

43%



Sustainability

33%



Technological

25%



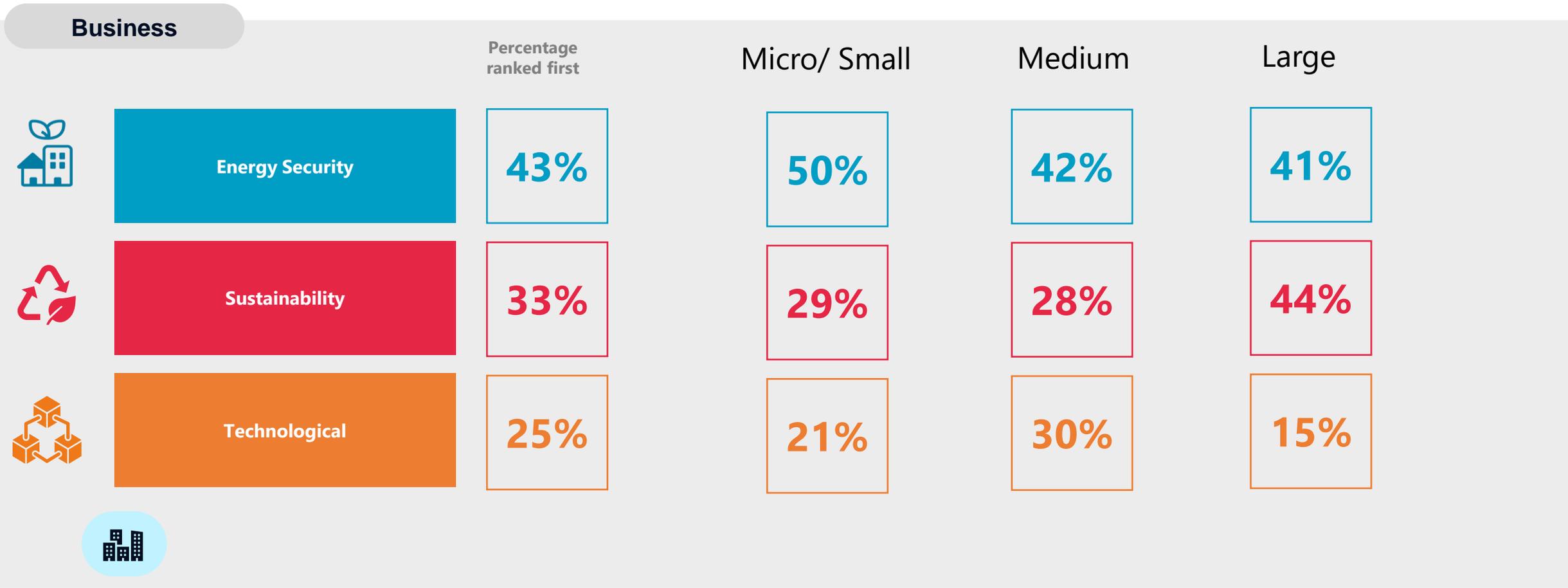
Significantly higher/lower business versus domestic

Innovation – by business size 6

★ Extra content added post debrief

NEW QUESTION

Innovations around energy security are ranked most important by both domestic and business customers, followed by innovations around sustainability. Differences by business size are not statistically significant (low based size)



 Significantly higher/lower business versus total

Q31. There are a number of areas that NGN could look to provide innovation. Please rank these areas where 1 is most important and 3 is least important. Weighted base; wave 5=, Business 94)

Innovation – by demographic 6

★ Extra content added post debrief

NEW QUESTION

Energy security significantly more important for those aged 50+, and directionally more for the digitally disengaged and those eligible for PSR. Sustainability more important for those aged 18-29.

Domestic

	Total	PSR eligible		18-29	30-49	50-69	70+	Digitally disengaged	Online
		Yes	No						
 Energy Security	56%	59%	50%	39%↓	46%↓	66%↑	72%↑	71%	54%
 Sustainability	29%	29%	30%	44%↑	34%	23%	18%	13%	31%
 Technological	15%	13%	19%	15%	15%	15%	15%	16%	15%

Percentage ranked first

Digitally disengaged customers are more likely to be: Retired, on a state pension, DE social grade, 70+, have a vulnerability, especially medical or physical

25% of 70+ years are digitally excluded

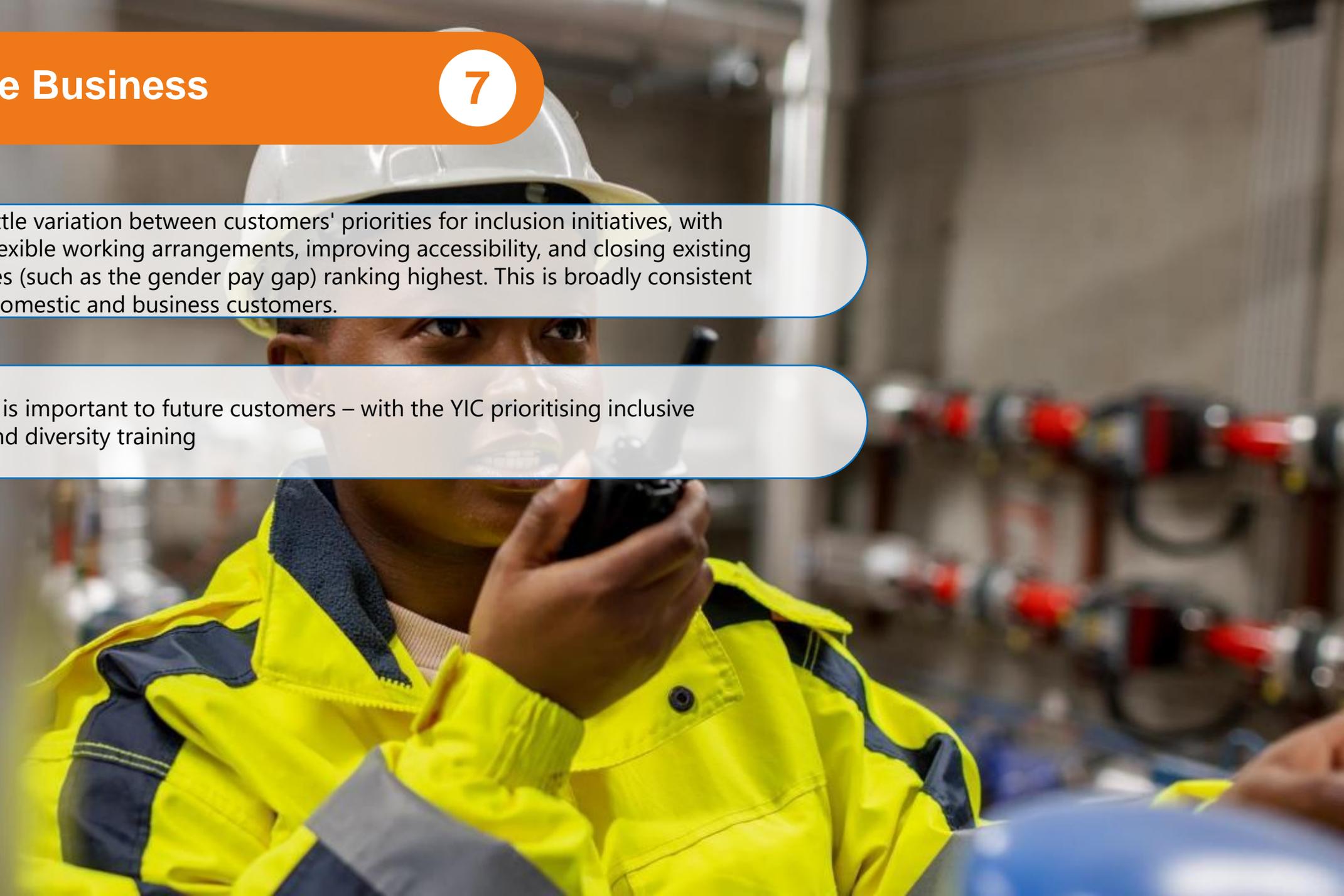
No significant difference by gender, social grade, financially vulnerable

1

There is little variation between customers' priorities for inclusion initiatives, with offering flexible working arrangements, improving accessibility, and closing existing inequalities (such as the gender pay gap) ranking highest. This is broadly consistent for both domestic and business customers.

2

Inclusivity is important to future customers – with the YIC prioritising inclusive policies and diversity training



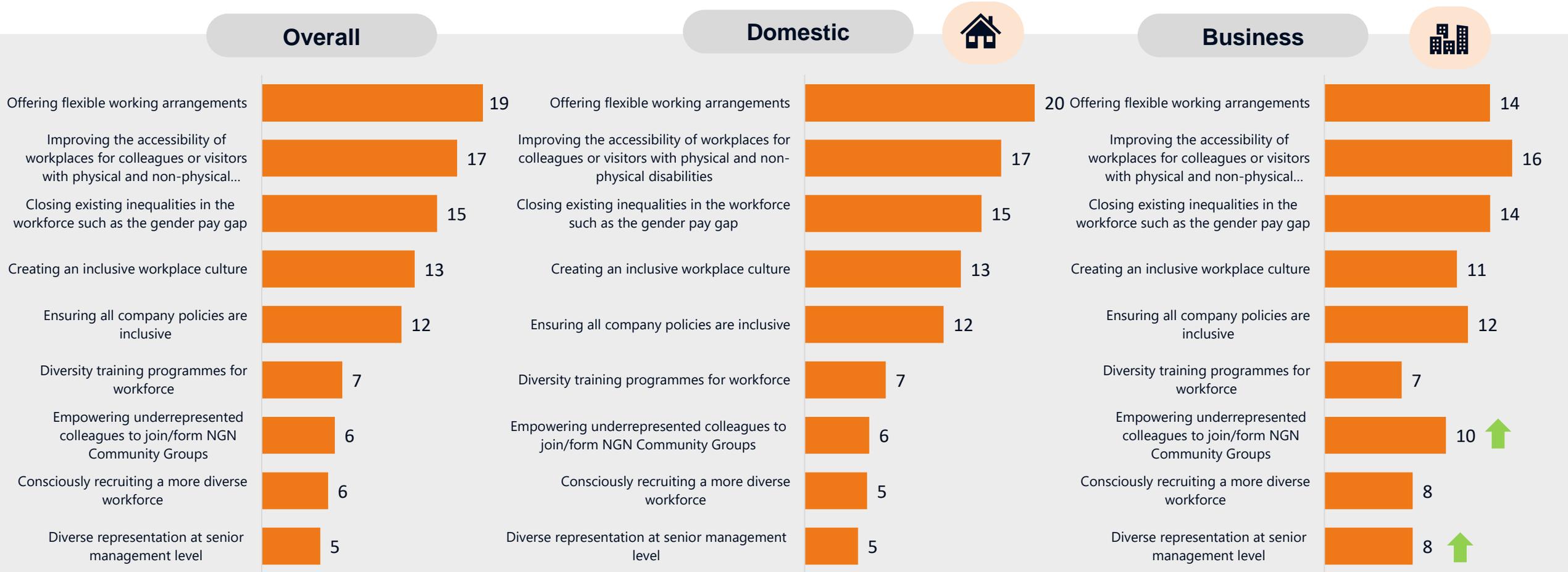
Responsible Business

Customers priorities

7

NEW QUESTION

There is little variation between customers' priorities for inclusion initiatives, with offering flexible working arrangements, improving accessibility, and closing existing inequalities (such as the gender pay gap) ranking highest. This is broadly consistent for both domestic and business customers.



Q39. We are interested in what inclusion initiatives for NGN employees you think NGN should prioritise. Please select 3 from the list below which you think are the most important. . (Weighted base; wave 5= 156; Domestic: 130; Business 23)

↑ ↓ Significantly higher/lower domestic vs business

Responsible Business

Customers priorities

7

Results for YIC have been weighted to reflect fewer attributes

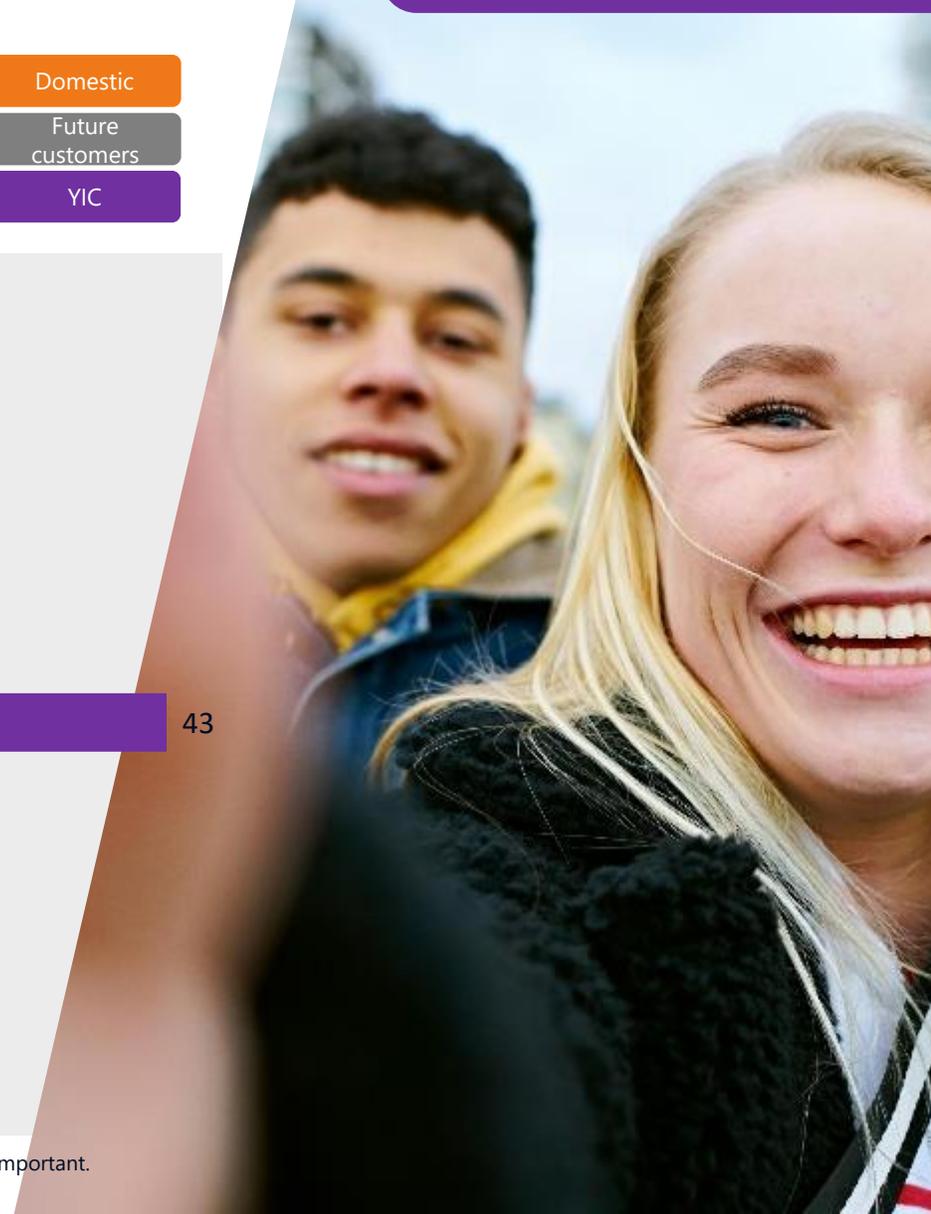
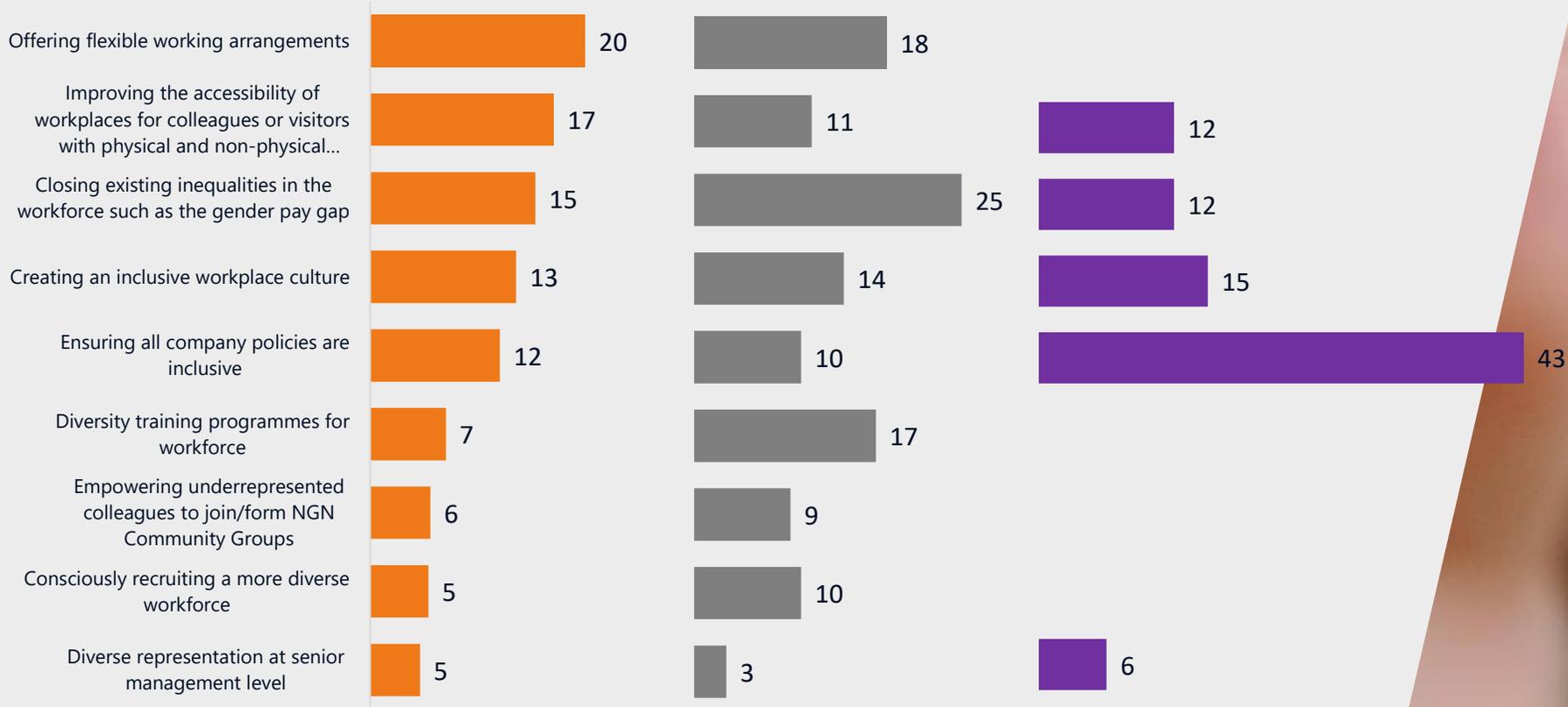
TRACKING QUESTION(S)

YOUNG INNOVATION COUNCIL

Inclusivity is important to future customers – with the YIC prioritising inclusive policies and future customers in the survey supportive of diversity training

- Domestic
- Future customers
- YIC

Jan 25



Q39. We are interested in what inclusion initiatives for NGN employees you think NGN should prioritise. Please select 3 from the list below which you think are the most important. Weighted base: Total: 378, Future customers: 69, YIC: 29)

Vulnerability

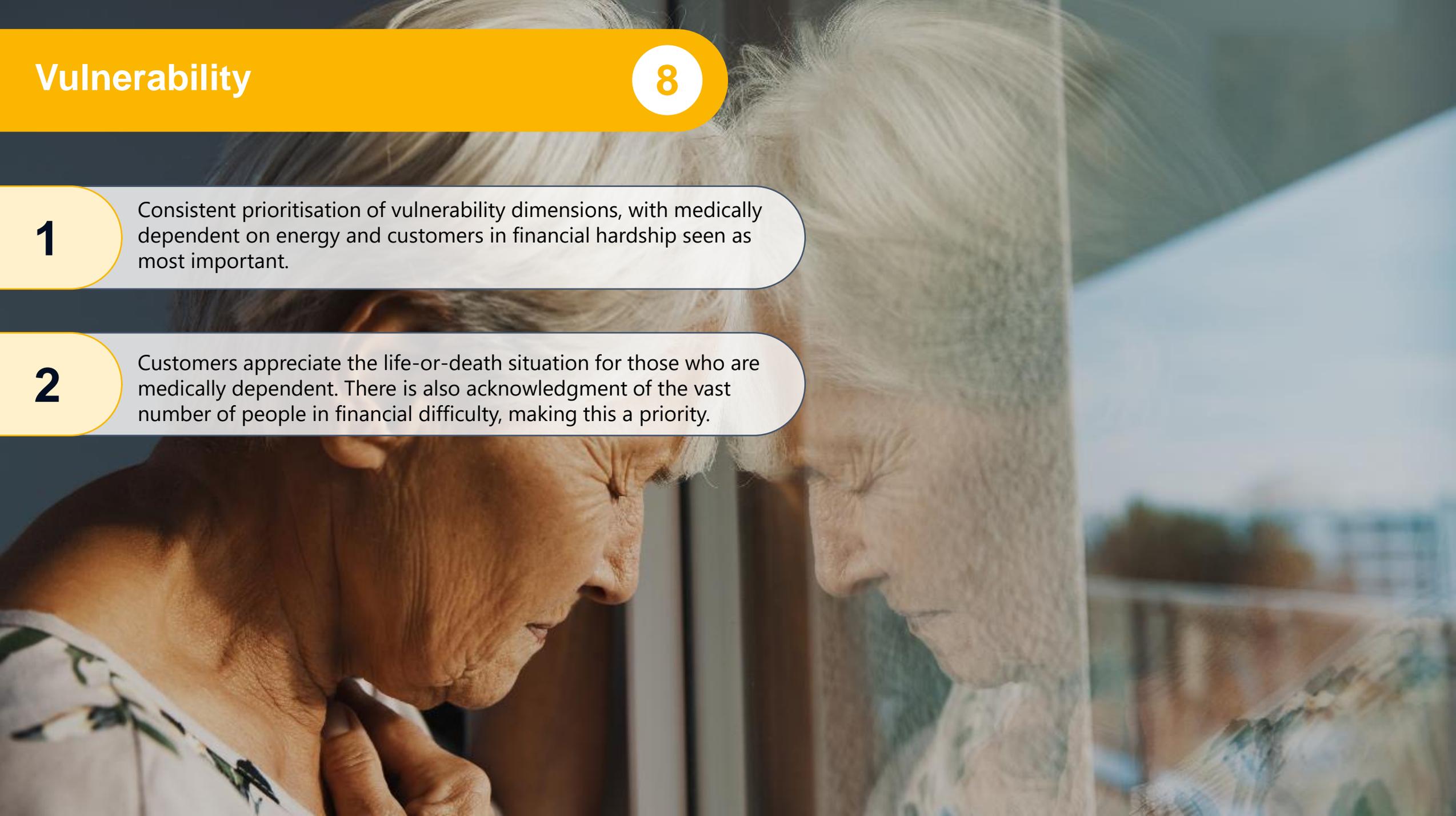
8

1

Consistent prioritisation of vulnerability dimensions, with medically dependent on energy and customers in financial hardship seen as most important.

2

Customers appreciate the life-or-death situation for those who are medically dependent. There is also acknowledgment of the vast number of people in financial difficulty, making this a priority.



Vulnerability

Vulnerability dimensions and initiatives

8

Customers were asked a series of questions relating to NGNs underrepresented customer segmentation. We asked customers to think about the ways that NGN supports customers who have different inclusion needs or who experience different vulnerable situations.



Vulnerability

Vulnerability dimensions and initiatives

8

★ Extra content added post-debrief

TRACKING QUESTION(S)

Total

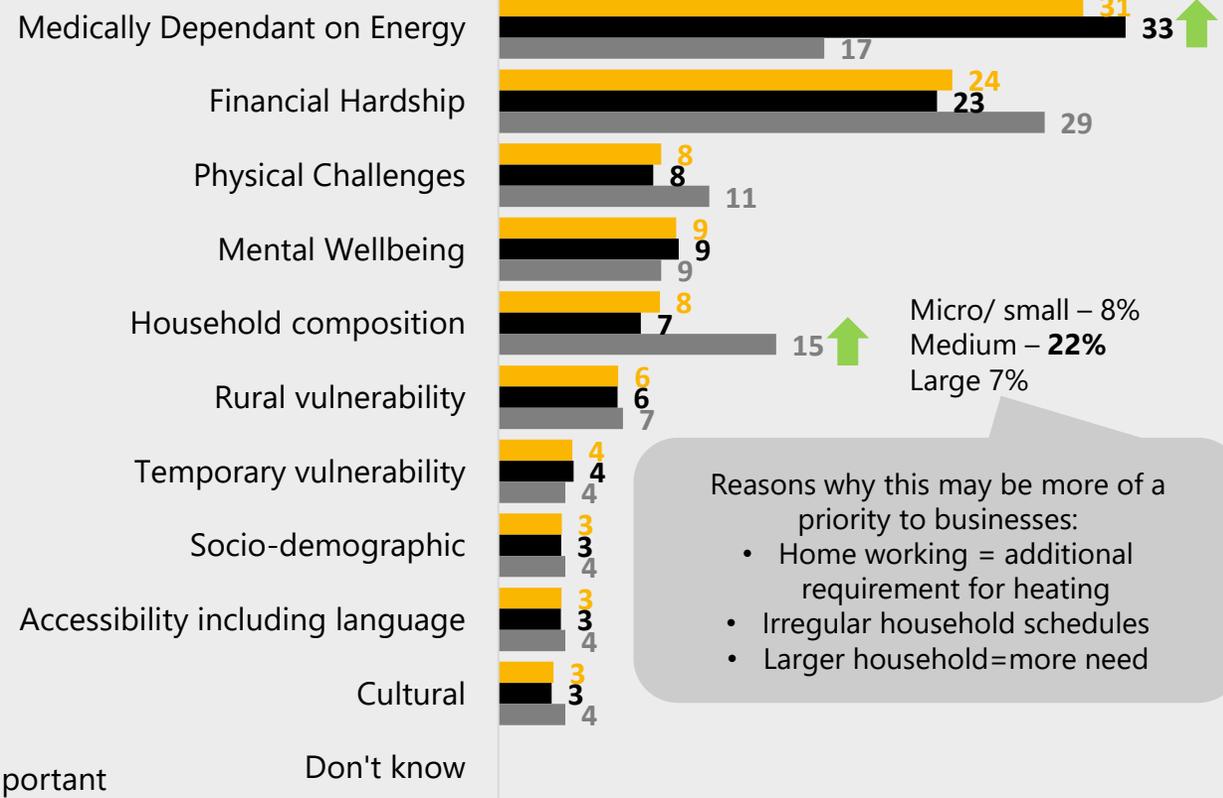
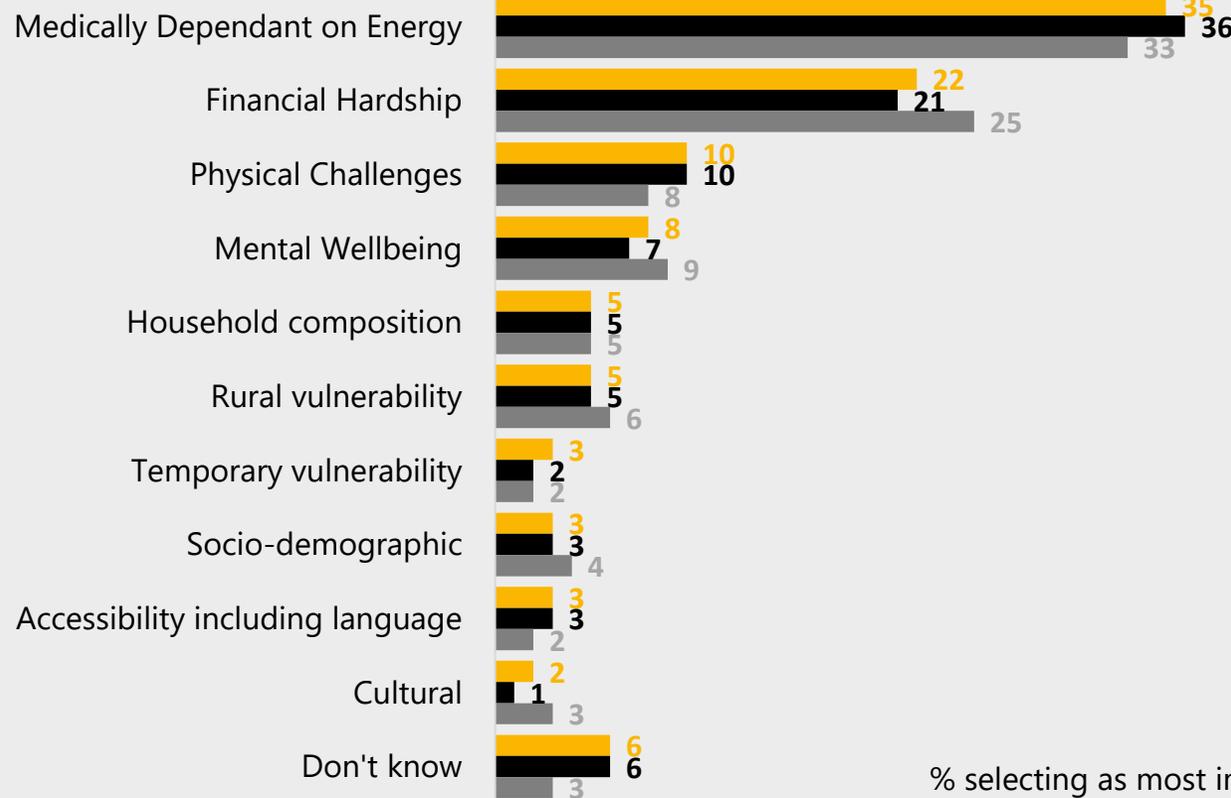
Domestic

Business

Consistent prioritisation of vulnerability dimensions, with medically dependent on energy and customers in financial hardship seen as most important. Customers appreciate the life-or-death situation for those who are medically dependent. There is also acknowledgment of the vast number of people in financial difficulty, making this a priority.

Jan 24

Jan 25



% selecting as most important

Don't know

Q32. 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. Weighted base; wave 5 1,443, Domestic 1,223, Business 200, New question in wave 4

↑↓ Significantly higher/lower than total

Vulnerability

Reasons why most important

8

NEW QUESTION

Customers appreciate the life or death situation for those who are medically dependent. There is also acknowledgment of the vast number of people in financial difficulty, making this a priority.

Medically dependent

There are a lot of people that have equipment in their houses that affect their quality of life and wellbeing. There are also those that need to use more energy to keep warm or have baths because of their conditions. I'm thinking people with complex needs

A continuous and reliable supply to the medically dependant could be the difference between a life and death situation at worst and life changing at best. This area must be prioritised

Because if somebody has medical equipment in their home and their power goes then their equipment won't work and they could become really sick . It could even be fatal.

If people have medical conditions their demands for heat etc are normally more critical than for more able bodied people. This could be life threatening if supply is lost.

Financial challenges

The poorest need help the most

'A lot of citizens are going through financial hardship especially with the ongoing economic crisis.

Lots of people have difficulty paying fuel bills especially the elderly due to the withdrawal of winter fuel allowance

In the current climate most of the country are suffering financial hardship, especially with energy costs as high as they are

Financial hardship is a big issue for many households

Financial hardship is the most important in my opinion as more and more people are struggling to make it across the bread line this day and age. Most of the people I talk to are either struggling to pay their energy bills or are already in debt with them.

Physical challenges

I have chronic pain issues hence reduced mobility

Physical challenges push us beyond our comfort zone.

'I know disabled people, and they need to stay warmer than I do as they cant move to generate their own heat. As a result heating costs are massive. They need as much help as possible

People with physical disabilities are often dependent on a lot of equipment so they are least able to protect themselves if energy sources are not available as it is essential to support medical conditions which might lead to death or deterioration without adequate energy

Vulnerability

Reasons why least important

8

NEW QUESTION

Customers who considered 'temporary vulnerability' to be the least important factor did so because they believed the situation would likely change. Other factors were typically seen as more important than cultural, language and rural.

Cultural

Don't understand why culture would be an important factor

I don't see it been an issue that NGN needs to get involved with

It shouldn't stop people having energy

People's culture shouldn't affect how homes are heated

No difference in culture we all keep warm

What have different cultures got to do with prioritising anything. we are all the same..just people.

Language

language came as a shock to me because there is always someone to help us to translate

Because there are other means for those who don't speak English to get help.

Ai has been able to help break the language barrier

People can use Google translate if required

The poorest need help the most

Rural

often people choose to live in a remote area so there are drawbacks

Because I don't live rural

A lot of rural properties have their own independent gas supply because of lack of infrastructure and cost of installation. Therefore they are not vulnerable to the costs or strictures of directly piped gas to their properties.

Because of all the dependency issues rural vulnerability is least important and the people have less needs

Rural residents are often resourceful and adaptable in the face of challenges.

Vulnerability

Vulnerabilities NGN best placed to support

8

NEW QUESTION

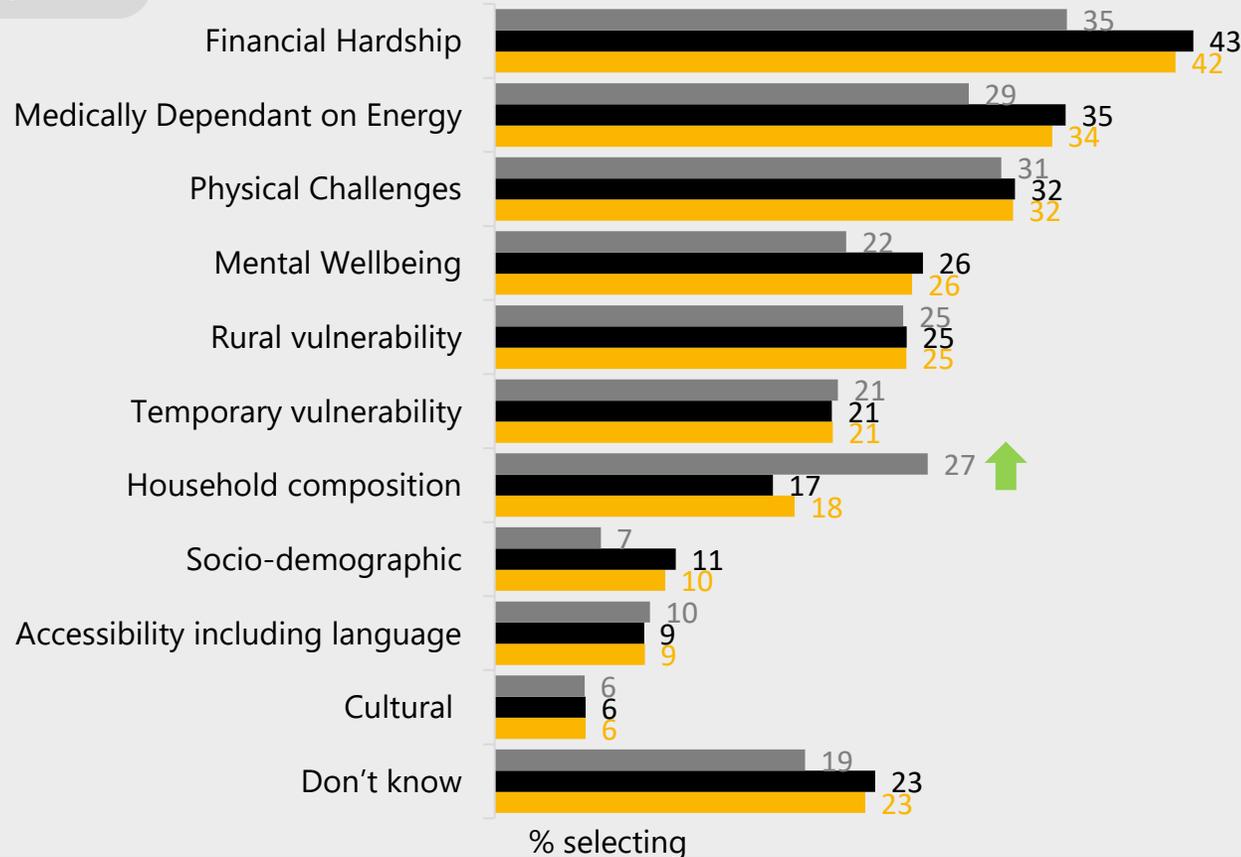
Total

Domestic

Business

NGN are also seen as best placed to support those in financial hardship, and customers who are medically dependent on energy. Customers have an expectation that large organisations should be able to provide financial support, or that NGN has some control over energy bills. The role energy can place in supporting those with medical dependency /physical conditions means customers feel NGN are equipped to provide support.

Jan 25



Q35. Of the 10 aspects of vulnerability, which, if any, do you feel that NGN are best-placed to provide support with? Please select all that apply. Q36. Why do you say this? Wave 5: 1,423, Domestic: 1,1223, Business: 200. New question in wave 5

Significantly higher/lower than total

Vulnerability

Vulnerabilities NGN best placed to support

8

NEW QUESTION

Customers have an expectation that large organisations should be able to provide financial support, or that NGN has some control over energy bills. The role energy can place in supporting those with medical dependency /physical conditions means customers feel NGN are equipped to provide support.

Financial

Energy bills are a significant expense, and paying for energy becomes more difficult when one is struggling financially. NGN can offer assistance and payment arrangements.

All companies serving the nation should have systems in place to help people who are struggling financially

Providing financial assistance or subsidies for energy costs, makes it easier for those struggling to pay bills

Because they can give grants or have a social fund like BT has for people on low income they have an essentials package and utility companies should do the same

As a major company they are in a position to influence the amount of money a household has to spend on their service.

Consumers who are struggling financially could find it difficult to pay their gas bills, which could result in late payments or even disconnection

Medical dependency

All equipment must be operational all the time.

Because it is a supplier's ethical right to look after these customers at all times

Because they are the most vulnerable

Certain conditions make the sufferers more dependent on energy to heat water keep warm etc. these should be identified and given assistance

For individuals who rely on energy for medical equipment, NGN can offer priority services & support to ensure their needs are met

If someone suffers from an illness that requires the individual to keep warm, they should receive priority.

Keep a data base of those customers and their carers who are medically dependent on energy prioritising them in terms of communication and ensuring the disruption in those homes is kept to a minimum.

People like myself, chronic cancer and would not survive with out heat

Physical

Because people who are challenged physically are reliant on energy and you could help them manage it and have enough

Because some people can't move around or active and need heat to keep them warm

Can need help during emergency

Dependable energy powers mobility devices, guaranteeing safety and autonomy for at-risk individuals.

They are not mobile and rely on energy to keep them safe and warm

Dependable energy powers mobility devices, guaranteeing safety and autonomy for at-risk individuals.

They need to help people who are housebound or cannot get around to heat their homes

Vulnerability

Vulnerabilities NGN NOT best placed to support

8

NEW QUESTION

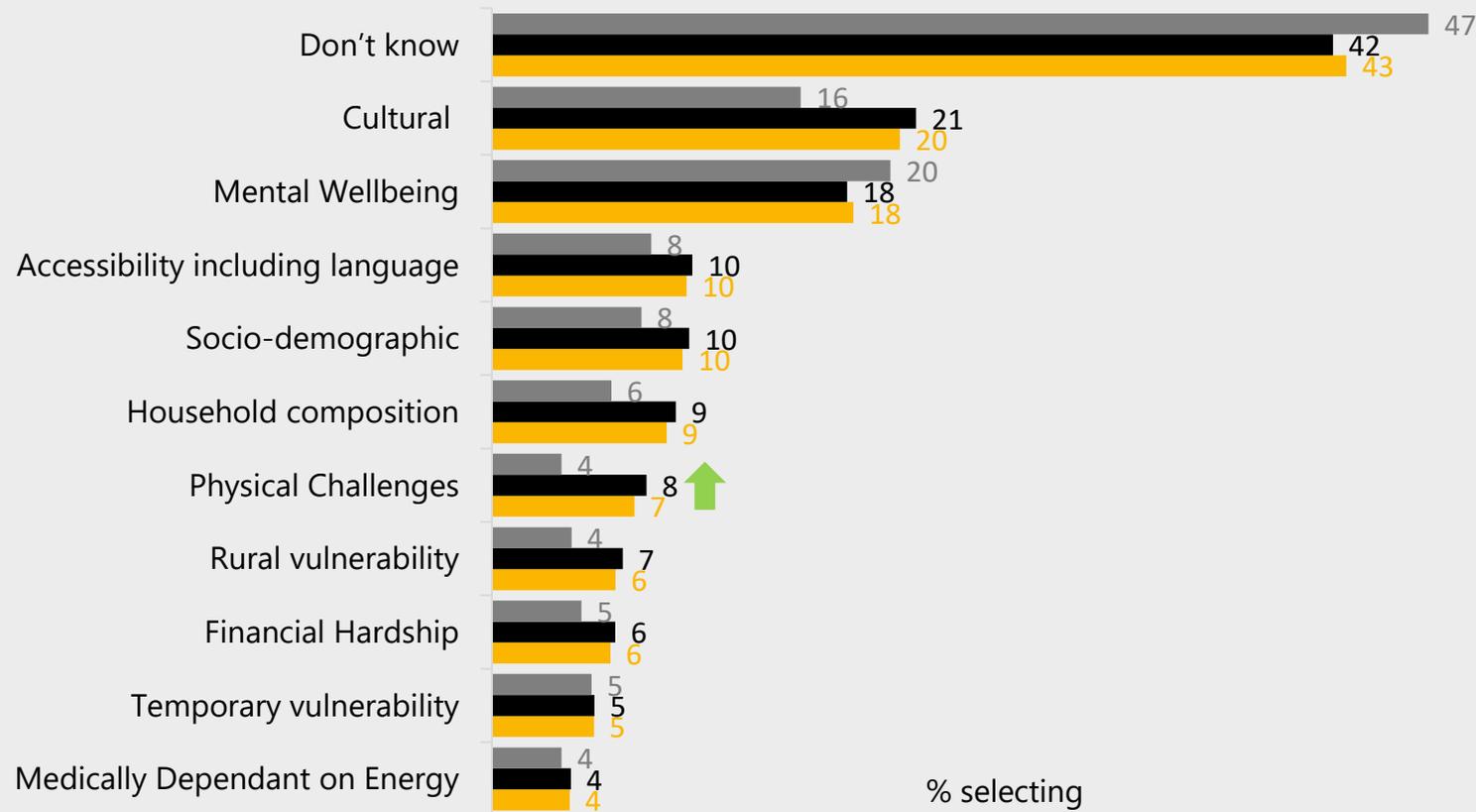
Total

Domestic

Business

Similarly, NGN are not seen as best place to support cultural and mental well being challenges

Jan 25



% selecting

Vulnerability

Vulnerabilities NGN best placed to support

8

NEW QUESTION

Customers believe NGN do not have the specialist skills required to provide mental well being, cultural or language support, and that these are less relevant to NGNs core objectives

Mental well being

They are not trained for this

I don't think it's their job, the NHS and private health organisations are the best for dealing with it.

Addressing mental health requires specialised training and resources that are typically outside the scope of NGN

'Mental health support requires professionals, not an energy service provider.

Gas network suppliers typically lack the specialised expertise and training needed to provide mental health care. Access to mental health services, counsellors, and medical experts who are better qualified to offer the required support and treatment is essential

Because very few organisations know how to help people in this category

Cultural

Cultural sensitivity and support require a nuanced understanding of diverse backgrounds, which may not align with the more mission of NGN

Best left to those able to provide expert advice

Because cultural difference is not related to your services or even my concerns

Because they are not knowledgeable about all cultures

Cultural sensitivity is important, but NGN's role is energy distribution.

Culture has nothing to do with gas infrastructure. It is not where their resources should be focused.

I don't know how a gas company can get involved in cultural issues.

Language

As an infrastructure company, they shouldn't be primarily focuses on something that is more of a customer service issue.

Relevant organisations can prevent assistance

Not NGN responsibility

Because language is not a general problem like financial hardships

Because NGN is not mainly focused on language barriers

This would be more relevant to be dealt with by the end supplier that sends bills to people.

Other authorities responsibility to help. Although people with genuine disabilities yes you should make it easier for them to get in touch with customer services etc.

Keeping your household safe

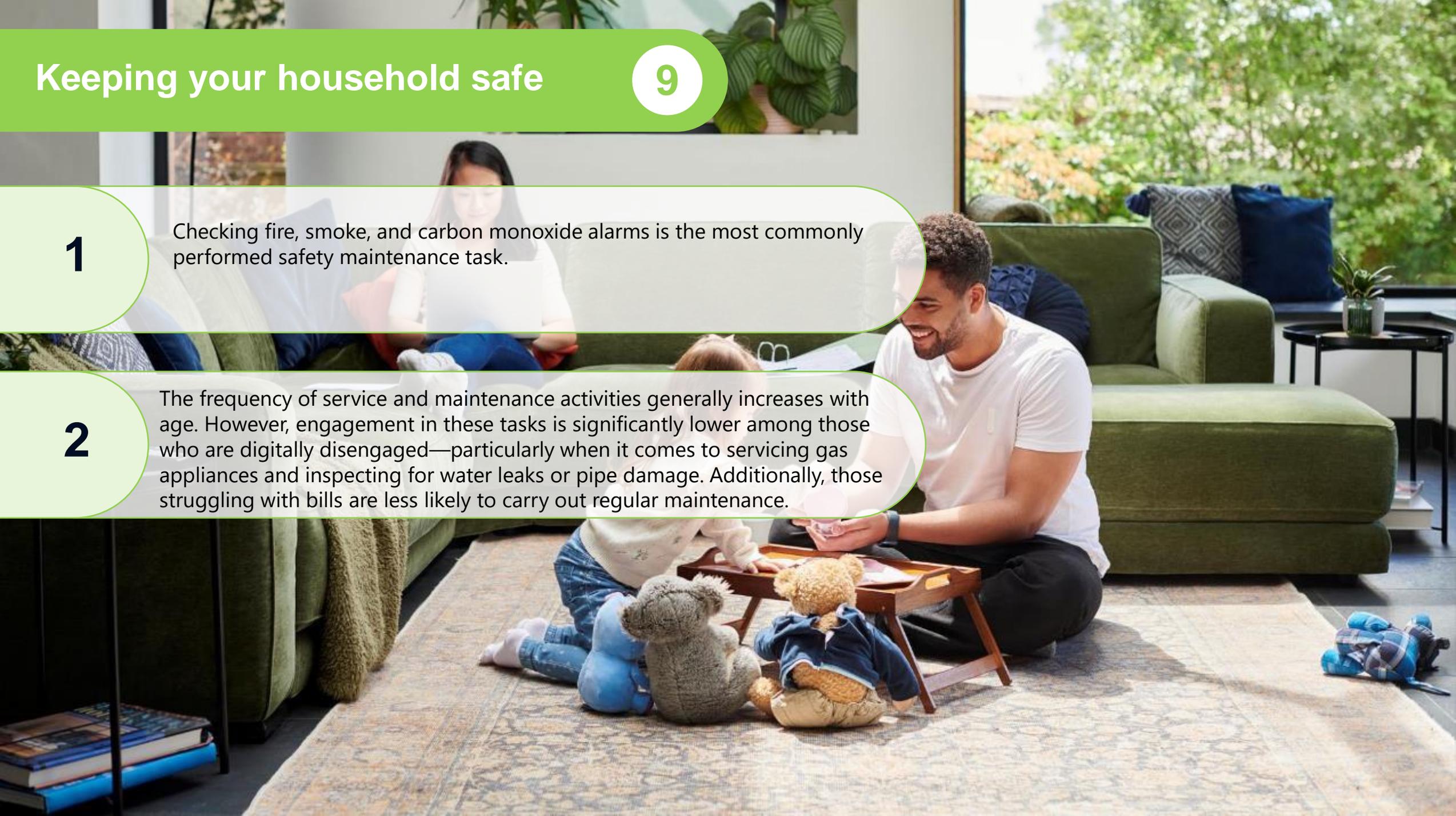
9

1

Checking fire, smoke, and carbon monoxide alarms is the most commonly performed safety maintenance task.

2

The frequency of service and maintenance activities generally increases with age. However, engagement in these tasks is significantly lower among those who are digitally disengaged—particularly when it comes to servicing gas appliances and inspecting for water leaks or pipe damage. Additionally, those struggling with bills are less likely to carry out regular maintenance.



Keeping your household safe

Safety maintenance actions

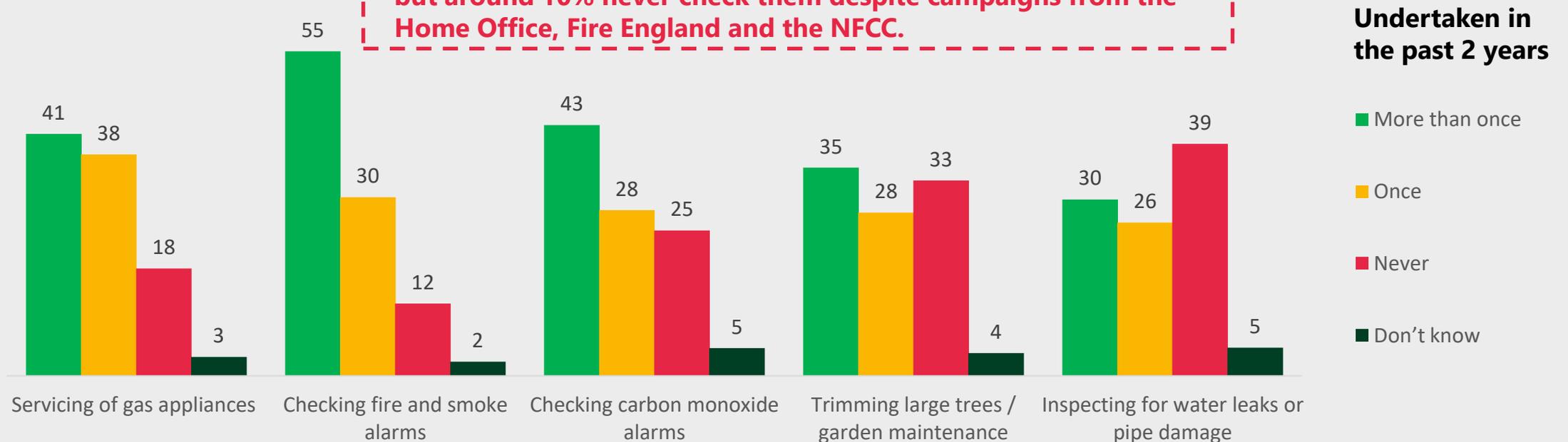
★ Extra content added post-debrief

NEW QUESTION

Checking fire and smoke alarms and carbon monoxide alarms are the most frequently undertaken tasks. Frequency of service maintenance actions generally increases with age. Activities are significantly lower for those who are digitally disengaged (especially servicing of gas appliances and inspecting for water leaks/pipe damage) and those who are struggling with bills.

Jan 25

85% of NGN customers state they check fire and smoke alarms once or more a year. Nationally 93% own a working fire alarm but around 10% never check them despite campaigns from the Home Office, Fire England and the NFCC.



Undertaken in the past 2 years

- More than once
- Once
- Never
- Don't know

Keeping your household safe

9

Safety maintenance actions

★ Extra content added post debrief

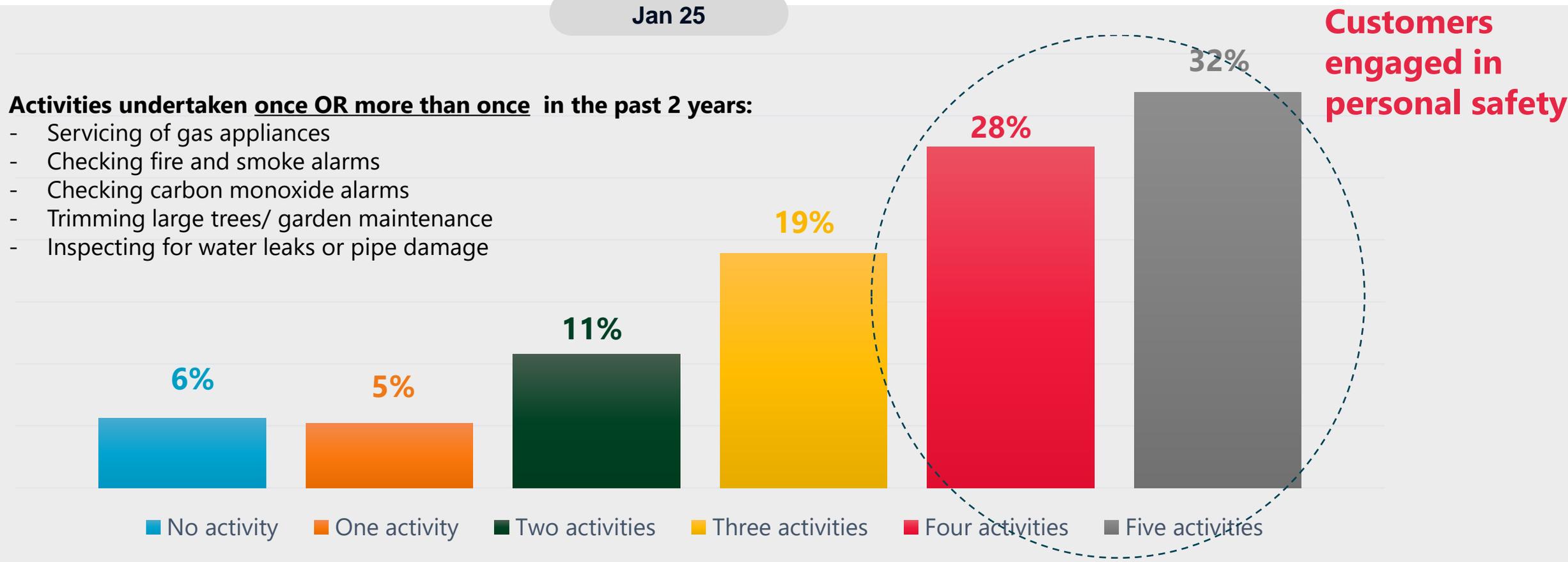
NEW QUESTION

6% of customers had not undertaken any of the 5 safety activities (once or more than once) in the past 2 years. This chart clearly shows that 50% of customers are committed to 'safety', conducting 4 or more activities at least once in a two-year period.

Jan 25

Activities undertaken once OR more than once in the past 2 years:

- Servicing of gas appliances
- Checking fire and smoke alarms
- Checking carbon monoxide alarms
- Trimming large trees/ garden maintenance
- Inspecting for water leaks or pipe damage



Keeping your household safe

Safety maintenance actions

9

★ Extra content added post debrief

NEW QUESTION

The key relationships observed are between fire and smoke alarm checks and

- carbon monoxide checking
- servicing gas appliances

Jan 25

Checking fire and smoke alarms AND checking carbon monoxide alarms

Correlation
0.57

Correlations indicate the association between 2 activities – with a maximum of 1, which would indicate respondents had the same level of activity on both activities.

Correlations above 0.4 show that the level of attention placed on one activity is closely matched with the other.

Of those who checked fire and smoke alarms more than once....

69%

Also checked carbon monoxide alarms more than once

Servicing gas appliances AND checking fire and smoke alarms

Correlation
0.41

Of those who checked fire and smoke alarms more than once....

58%

Also serviced gas appliances more than once

Keeping your household safe

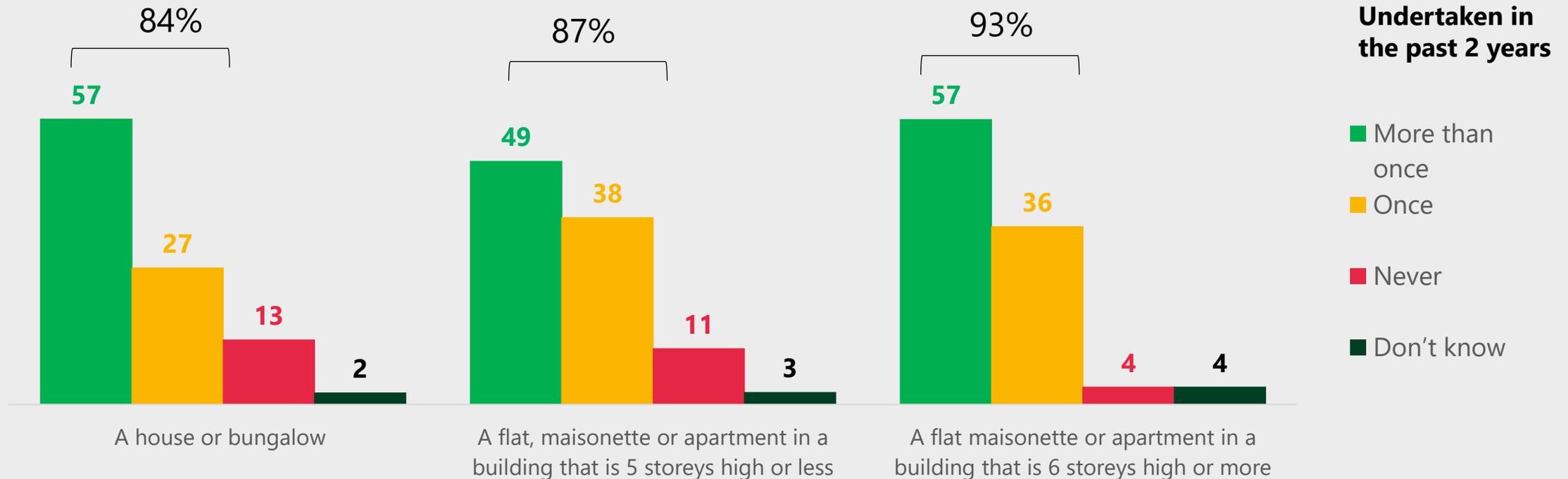
Checking fire and smoke alarms

★ Extra content added post debrief

NEW QUESTION

Checking fire and smoke alarms is consistent across different dwellings, with high rise apartments slightly more at 93% (non significant directional increase).

Jan 25 – Checking fire and smoke alarms



Keeping your household safe

Safety maintenance actions in future customers

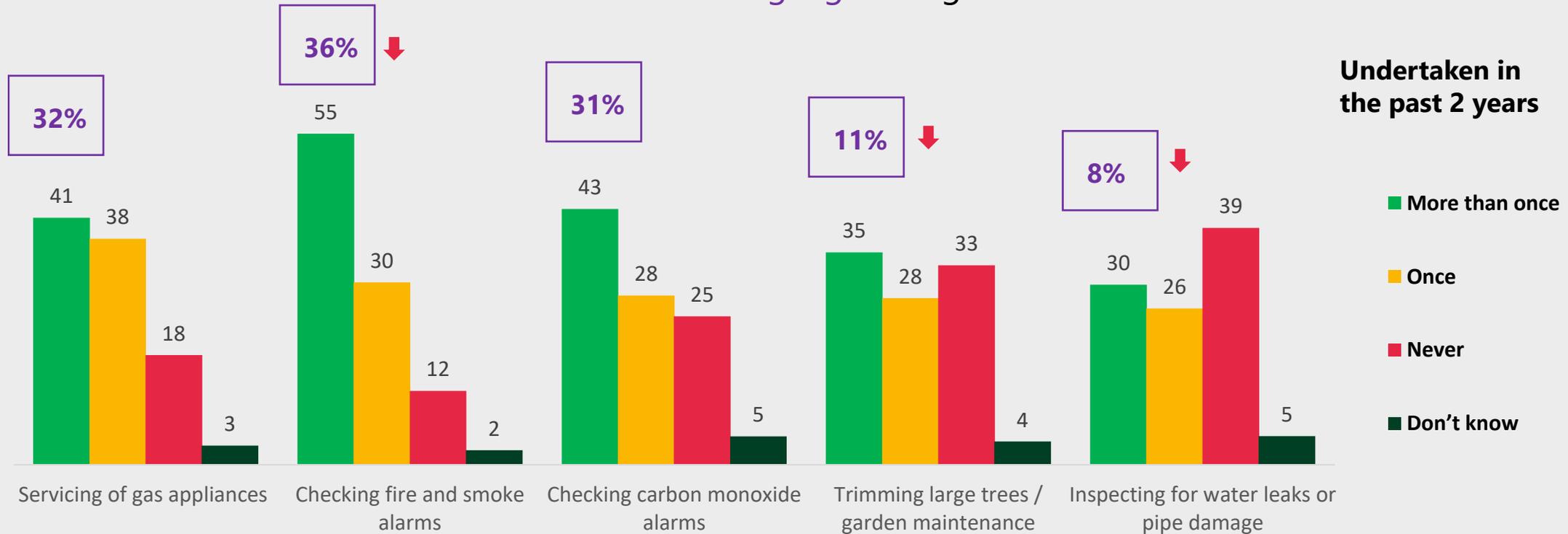
★ Extra content added post debrief

NEW QUESTION

Future customers are significantly less likely to conduct safety activities more than once (Checking fire/ safety alarms, trimming large trees and inspecting for water leaks). They are directionally less likely to check CO alarms and service appliances.

Jan 25

The differences for Future Customers **highlighted** against the total



Keeping your household safe

9

Safety maintenance actions

NEW QUESTION



Frequency of service maintenance actions generally increases with age. Activities are significantly lower for those who are digitally disengaged (especially servicing of gas appliances and inspecting for water leaks/pipe damage) and those who are struggling with bills

Age – Jan 25 Domestic

	Age			
	18-29	30-49	50-69	70+
Servicing of gas appliances	30%	35%	48%	52%
Checking fire and smoke alarms	43%	53%	63%	61%
Checking carbon monoxide alarms	27% ↓	43%	47%	41%
Trimming large trees / garden maintenance	17% ↓	32%	42%	41%
Inspecting for water leaks or pipe damage	22%	33%	28%	24%

PSR Eligible – Jan 25 Domestic

	PSR Eligible	
	No	Yes
Servicing of gas appliances	39%	42%
Checking fire and smoke alarms	51%	59%
Checking carbon monoxide alarms	37%	47%
Trimming large trees / garden maintenance	38%	32%
Inspecting for water leaks or pipe damage	26%	29%

SEG – Jan 25 Domestic

	SEG			
	AB	C1	C2	DE
Servicing of gas appliances	52% ↑	41%	34%	39%
Checking fire and smoke alarms	61%	53%	62%	49%
Checking carbon monoxide alarms	47%	38%	46%	44%
Trimming large trees / garden maintenance	43%	37%	26%	22%
Inspecting for water leaks or pipe damage	37%	30%	25%	22%

Financially vulnerable– Jan 25 Domestic

	Digital status		Bills	
	Digitally disengaged	Online	Pay without difficulty	Constant struggle / fall behind
Servicing of gas appliances	19% ↓	43% ↑	47%	37%
Checking fire and smoke alarms	39%	58%	55%	58%
Checking carbon monoxide alarms	37%	44%	44%	43%
Trimming large trees / garden maintenance	28%	35%	38%	30%
Inspecting for water leaks or pipe damage	5% ↓	30% ↑	28%	28%

% undertaken more than once in past 2 years

Keeping your household safe 9

Safety maintenance actions

NEW QUESTION



Frequency of service maintenance actions (**more than once over a 2 year period**) generally increases with the presence of a medical vulnerability and those who have both a state and private pension.

Gender – Jan 25 Domestic

	Gender	
	Male	Female
Servicing of gas appliances	38%	44%
Checking fire and smoke alarms	56%	53%
Checking carbon monoxide alarms	43%	42%
Trimming large trees / garden maintenance	37%	33%
Inspecting for water leaks or pipe damage	35%	25%

Medical Vulnerability – Jan 25 Domestic

	Medical Vulnerability	
	No	Yes
Servicing of gas appliances	39%	47%
Checking fire and smoke alarms	53%	62%
Checking carbon monoxide alarms	39%	55%
Trimming large trees / garden maintenance	36%	33%
Inspecting for water leaks or pipe damage	29%	34%

Pension type – Jan 25 Domestic

	Pension		
	State	Private	Both
Servicing of gas appliances	50%	47%	52%
Checking fire and smoke alarms	47%	47%	70%
Checking carbon monoxide alarms	47%	29%	56%
Trimming large trees / garden maintenance	37%	33%	44%
Inspecting for water leaks or pipe damage	17%	44%	30%

Physically vulnerable– Jan 25 Domestic

	Physical vulnerability	
	No	Yes
Servicing of gas appliances	41%	43%
Checking fire and smoke alarms	54%	61%
Checking carbon monoxide alarms	42%	47%
Trimming large trees / garden maintenance	35%	36%
Inspecting for water leaks or pipe damage	30%	27%

% undertaken more than once in past 2 years

Keeping your household safe

Profile of those less likely to keep on top of checking

★ Extra content added
post debrief

NEW QUESTION



A profile of a customer who is less likely to keep on top of safety maintenance (ie. less than twice per year).

Young

Digitally
disengaged



State pension

No medical vulnerability

1

The majority of domestic (60%) and business customers (46%) prefer a balanced approach to investment, focusing equally on maintaining current resilience and future-proofing.

2

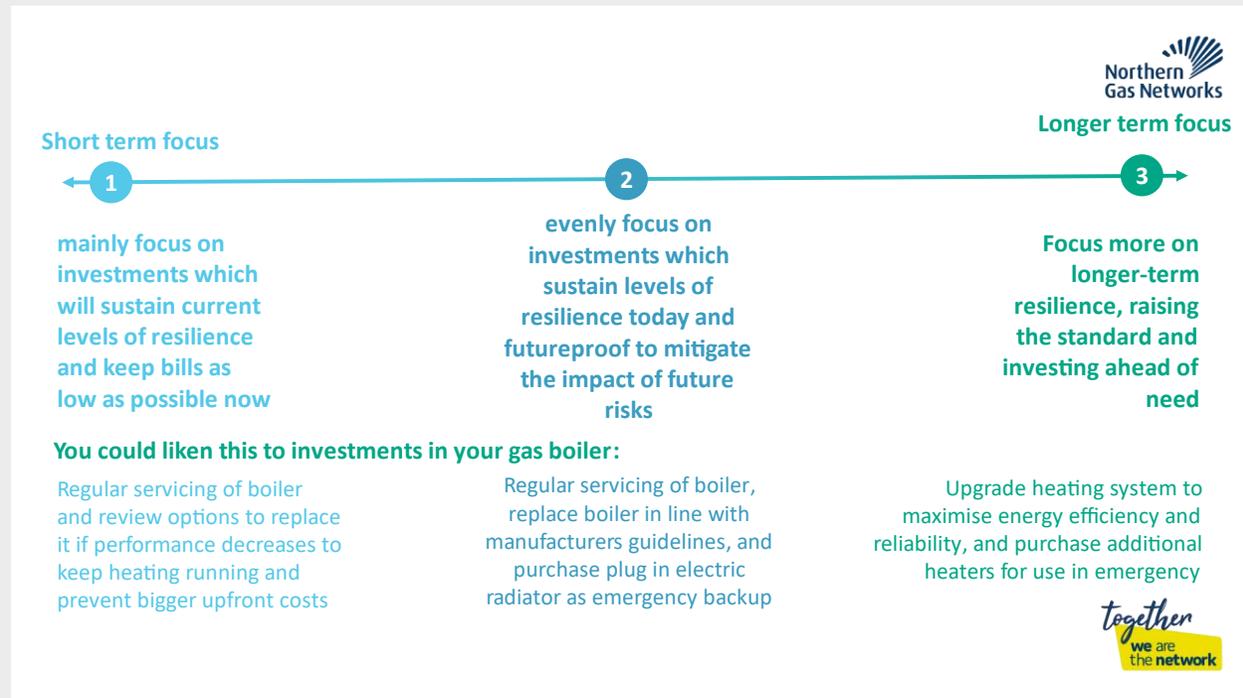
Customers facing financial difficulties are more likely to prioritise maintaining current resilience levels and keeping bills as low as possible. Older customers (60+) tend to be less supportive of long-term resilience investments.

3

Businesses, however, are more open to front-loading investment for future-proofing. While 39% of businesses believe NGN should prioritise long-term resilience by raising standards and investing ahead of need, only 18% of domestic customers share this view.



Customers were given some context about the need to balance investment and resilience



Resilience

Balancing resilience and investment

10

NEW QUESTION

Total

Domestic

Business

Customers would prefer investments are evenly focussed on maintaining resilience for today and future proofing.

Mainly focus on investments which will maintain current levels of resilience and keep bills as low as possible now

Evenly focus on investments which maintain levels of resilience today and futureproof to mitigate the impact of future risks

Focus more on longer-term resilience, raising the standard and investing ahead of need

21%

58%

22%



22%

60%



18%



15%

46%

39%



Resilience

Balancing resilience and investment by business size

10

★ Extra content added post-debrief

NEW QUESTION

Total

Domestic

Business

Customers would prefer investments are evenly focussed on maintaining resilience for today and future proofing. There are no significant differences across different business size (NB: low sample size)

Mainly focus on investments which will maintain current levels of resilience and keep bills as low as possible now

Evenly focus on investments which maintain levels of resilience today and futureproof to mitigate the impact of future risks

Focus more on longer-term resilience, raising the standard and investing ahead of need



15%

46%

39%

Micro/ Small

21%

43%

36%

Medium

14%

38%

48%

Large

11%

59%

29%

Resilience

Balancing resilience and investment

10

NEW QUESTION



Customers who struggle to pay bills are more likely to think NGN should focus on investment which will maintain current levels of resilience and keep bills as low as possible now. Customers aged 60+ are less supportive of longer term resilience investment.

Age – Jan 25 Domestic

	Age			
	18-29	30-49	50-69	70+
Mainly focus on investments which will maintain current levels of resilience and keep bills as low as possible now	19%	21%	21%	28%
Evenly focus on investments which maintain levels of resilience today and futureproof to mitigate the impact of future risks	52%	52%	71%	64%
Focus more on longer-term resilience, raising the standard and investing ahead of need	29%	26%	8% ↓	8% ↓

PSR Eligible – Jan 25 Domestic

	PSR Eligible	
	No	Yes
Mainly focus on investments which will maintain current levels of resilience and keep bills as low as possible now	19%	24%
Evenly focus on investments which maintain levels of resilience today and futureproof to mitigate the impact of future risks	62%	58%
Focus more on longer-term resilience, raising the standard and investing ahead of need	19%	18%

SEG – Jan 25 Domestic

	SEG			
	AB	C1	C2	DE
Mainly focus on investments which will maintain current levels of resilience and keep bills as low as possible now	26%	17%	24%	23%
Evenly focus on investments which maintain levels of resilience today and futureproof to mitigate the impact of future risks	55%	67%	58%	55%
Focus more on longer-term resilience, raising the standard and investing ahead of need	19%	16%	18%	22%

Financially vulnerable– Jan 25 Domestic

	Experienced a supply interruption		Bills	
	Yes	No	Pay without difficulty	Constant struggle / fall behind
Mainly focus on investments which will maintain current levels of resilience and keep bills as low as possible now	24%	21%	22%	39% ↑
Evenly focus on investments which maintain levels of resilience today and futureproof to mitigate the impact of future risks	56%	58%	59%	48%
Focus more on longer-term resilience, raising the standard and investing ahead of need	20%	21%	19%	13%



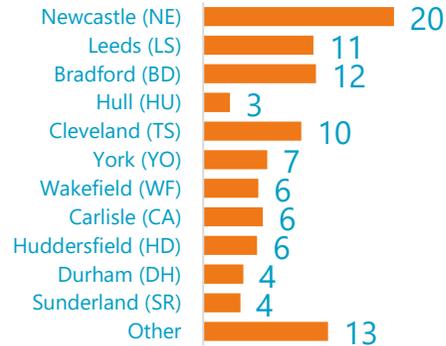
Domestic Customer Profile

11

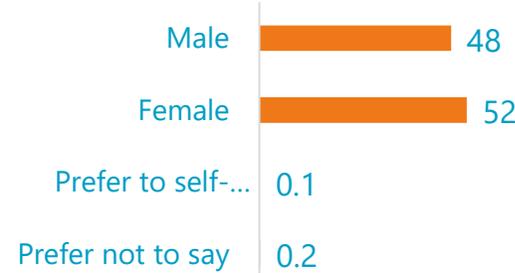
Age



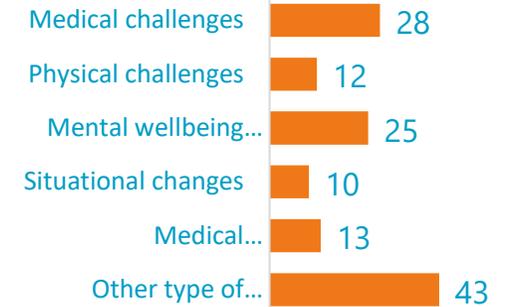
Postcode area



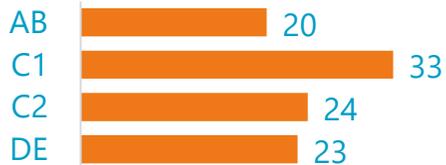
Gender



Vulnerability



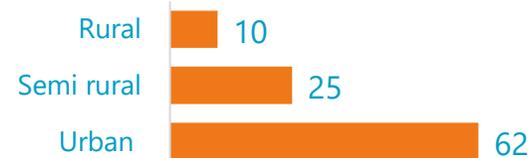
Social Grade



Energy use



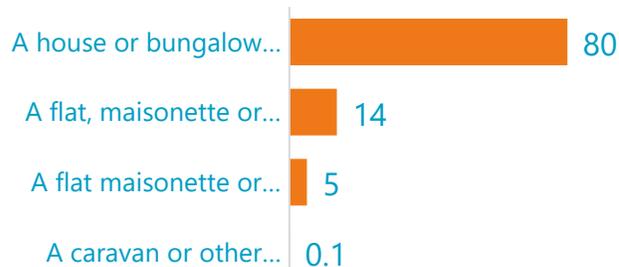
Location



Ethnicity



Accommodation



Work from home



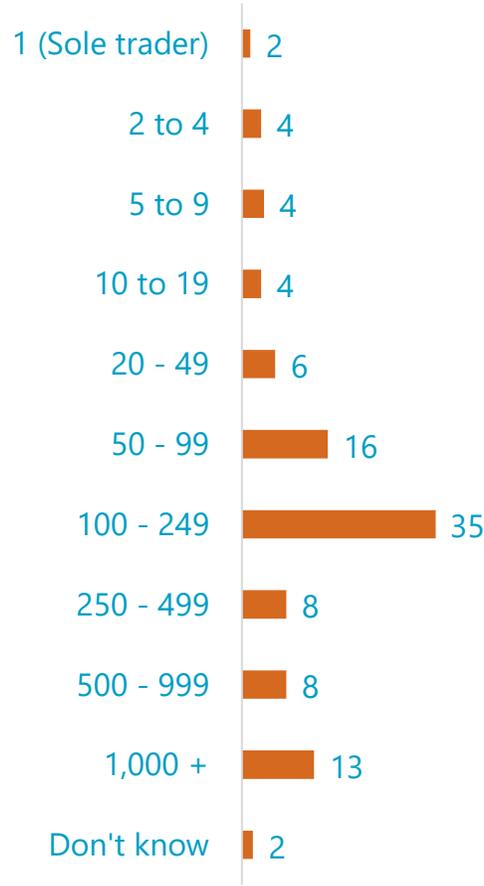
PSR Eligibility



Business Customer Profile

11

Business size



Postcode area



Location



Sector





Thank you



LEADERS IN STAKEHOLDER ENGAGEMENT

Northern Gas Networks

Customer perception research



Prepared by:
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