Northern Gas Networks

Customer perception research

WAVE 6

create clarity

LEADERS IN STAKEHOLDER ENGAGEMENT

Northern Gas Networks

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Contents

Background and objectives 1

Business need

As Northern Gas Networks (NGN) ends its current business cycle (RIIO-GD2) and prepares for RIIO-GD3, it is important to closely monitor stakeholder perceptions and priorities, as well as how they are influenced by the changing operating environment. Insights will inform strategic planning and the implementation of the RIIO-GD3 plan.

NGN has been tracking customer priorities and perceptions throughout RIIO-GD2. The fifth wave was conducted by Create Clarity in January 2025, with significant revisions made to the questionnaire. This sixth wave reports on fieldwork from January and February 2026.

Objectives of the research

This primary quantitative market research aims to:

- Track customer priorities and perceptions
- Inform planning and readiness for RIIO-GD3.

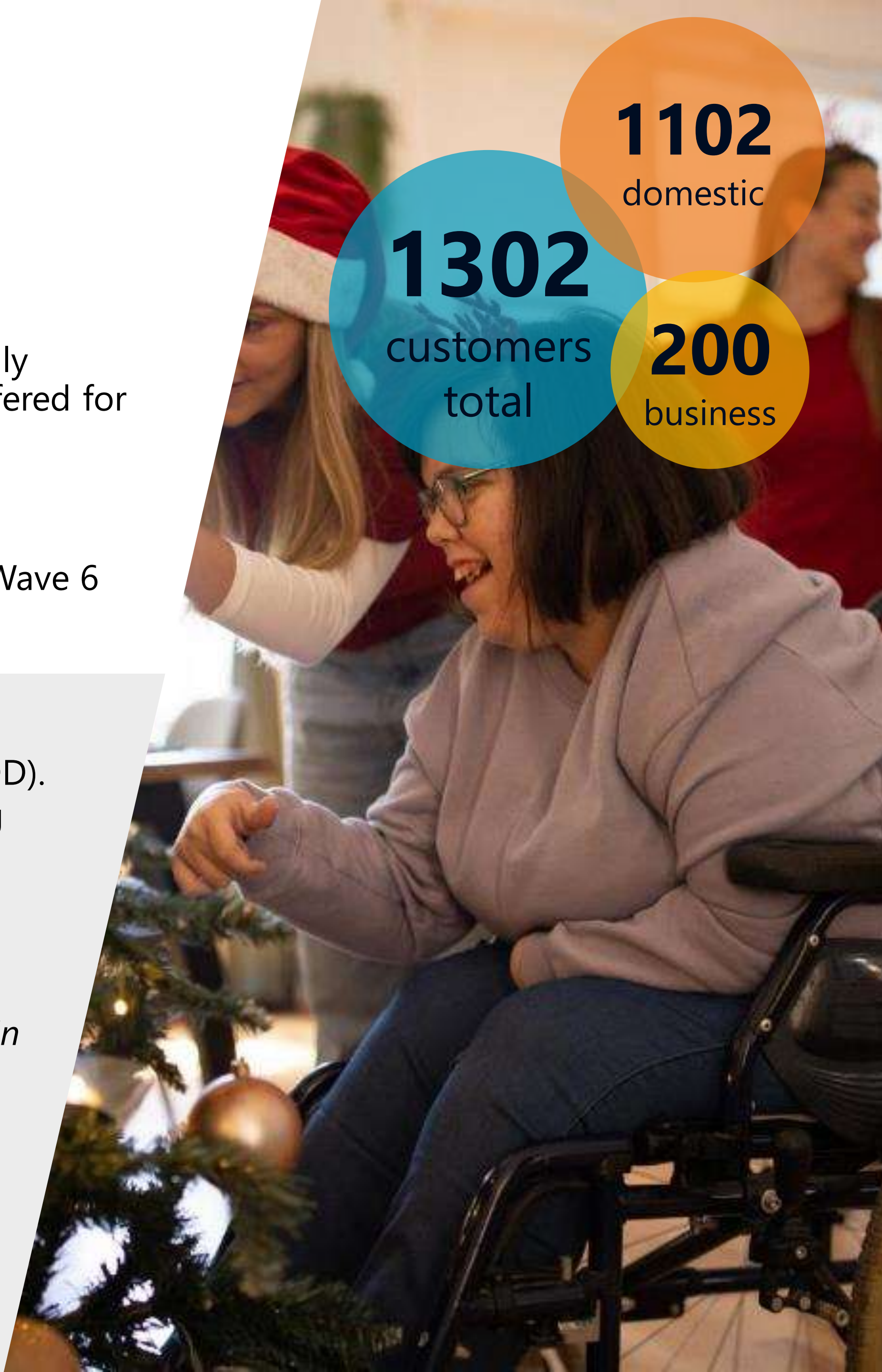
What we covered

- Awareness and perception of NGN
- Customer energy use and priorities
- Sustainability commitments
- Future energy and heating systems
- Responsible business
- Vulnerability
- Keeping your household safe
- Resilience

Research methodology 1

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

- Online panel (n=1,202)
- Face-to-face interviewing (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, Jan/Feb 26: Wave 6



NGN wave 6 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

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 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 18-29, and not a current bill payer

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

Key takeaways (1 of 2)

1

1

Cost-of-living pressures continue to shape customer behaviour:
The cost-of-living crisis continues to significantly impact customers.
Nearly half of domestic customers struggle to pay their bills at least from time to time and 58% self-ration energy (higher among those financially vulnerable or PSR-eligible).

2

Cost, reliability and safety remain consistent as core priorities
Unsurprisingly, keeping bills as low as possible continues to be a key priority. Equally important this wave, however, are providing a reliable, resilient supply and a safe service. Future customers (and feedback from the YIC) place a stronger priority on providing help for those who need it most and supporting the region to achieve net zero (after affordability and safety).

3

Education changes the priority balance:
The top three priorities take 77% of uninformed votes but this falls to 69% when informed, showing that education helps customers recognise the role of lower-ranked areas (e.g., net zero, digitalisation, collaboration). 42% think their priorities for NGN will change in the next five years due to rising energy costs, changes in personal circumstances, government policy and technological change.

4

Awareness and trust:
Awareness of NGN is lower this wave, for both domestic and business customers. This may partly reflect reduced communications around hydrogen. Customers seek trust in NGN via a perception of safety, good reputation and value for money. This should be backed up by great customer support, engagement with net zero, transparency, and fairness in decision-making.

5

Energy transition challenges:
Sustainability commitments are linked with cost. Future heating technologies like heat pumps are a cost barrier to many. 'Net zero' is unfamiliar territory for most: something they have heard of but don't know that much about. Many customers are aware that heating systems will change but lack detailed knowledge, especially domestic, PSR-eligible and financially vulnerable.

Key takeaways (2 of 2)

1

6

Customers want NGN to lead on transition information:
More than two-thirds of customers are interested in receiving net zero information, provided it is easy to understand. A similar proportion believe NGN should offer net zero advice to all adults. Customers want simple, practical net zero information covering energy-use reduction, grants/funding and new technologies.

7

Hydrogen/biomethane have strong acceptance for industrial use:
Two-thirds of customers find hydrogen and biomethane acceptable in commercial/industrial settings, with concerns continuing to fall. Businesses are particularly supportive.

8

Most customers want a say in local heating decisions:
Customers prefer local-level decision-making about heating changes and want the chance to influence plans.

9

Balancing resilience and future investments:
Nearly two thirds of customers support a balanced approach between maintaining current resilience and future-proofing. Customers facing financial difficulties are more likely to prioritise maintaining current resilience levels to keep bills low.

10

Customers feel it is important to provide support to those who need it:
Future customers place particular emphasis on helping those most in need and ensuring a fair transition to net zero. Customers believe NGN is best placed to support people with medical dependencies, those facing financial hardship, and those in rural areas, but not needs related to culture or mental health.

Our recommendations 1

1 **Strengthen clear, transparent communication:**
Emphasise NGN's commitment to customers, fairness in decision-making and transparency in business performance to build trust. Safety is a key driver of trust, so NGN's strong safety record should feature prominently. Communications should highlight customers top priorities (cost, reliability and safety) while explaining how lower-ranking areas contribute to these outcomes.

2 **Prioritise support:**
Continue to focus on energy-related vulnerabilities (medical dependency, financial hardship) where customers see NGN having the strongest role. Promote energy efficiency and affordable energy solutions

3 **Educate on the energy transition:**
Increase public understanding of low-carbon energy options by addressing the key concerns customers have around cost, reliability and safety. Provide clear, accessible explanations of available technologies and offer practical guidance on grants, funding and affordability to help overcome cost barriers.

4 **Enhance local, place-based engagement:**
Most customers want a say in heating system decisions and prefer local-level decision-making. Look to expand forums, local consultations and community touchpoints. Continue reinforcing hydrogen and biomethane as credible low-carbon options by building on strong acceptance for industrial/commercial use and highlighting their safety, reliability and environmental benefits.

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 to all customers.

Key summary 10

Awareness of NGN

66%	62%	67%	70%	76%	59%
Jan 21	Jan 22	Jan 23	Jan 24	Jan 25	Jan/Feb 26

Sig increase
Sig decrease

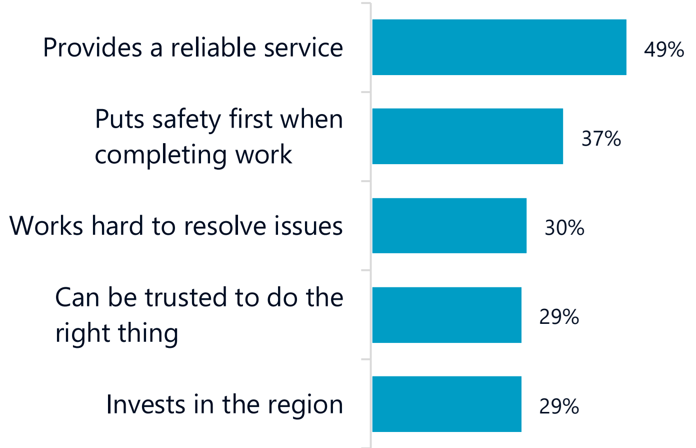
Difficulty paying bills

	Jan 21	Jan 22	Jan 23	Jan 24	Jan 25	Jan/Feb 26
Pay without difficulty	66%	53%	44%	49%	48%	54%
Pay with difficulty	33%	46%	55%	48%	50%	44%

Concerns about energy spend

	Jan 21	Jan 22	Jan 23	Jan 24	Jan 25	Jan/Feb 26
I am concerned about the amount of money we spend on energy	68%	85%	90%	88%	75%	75%

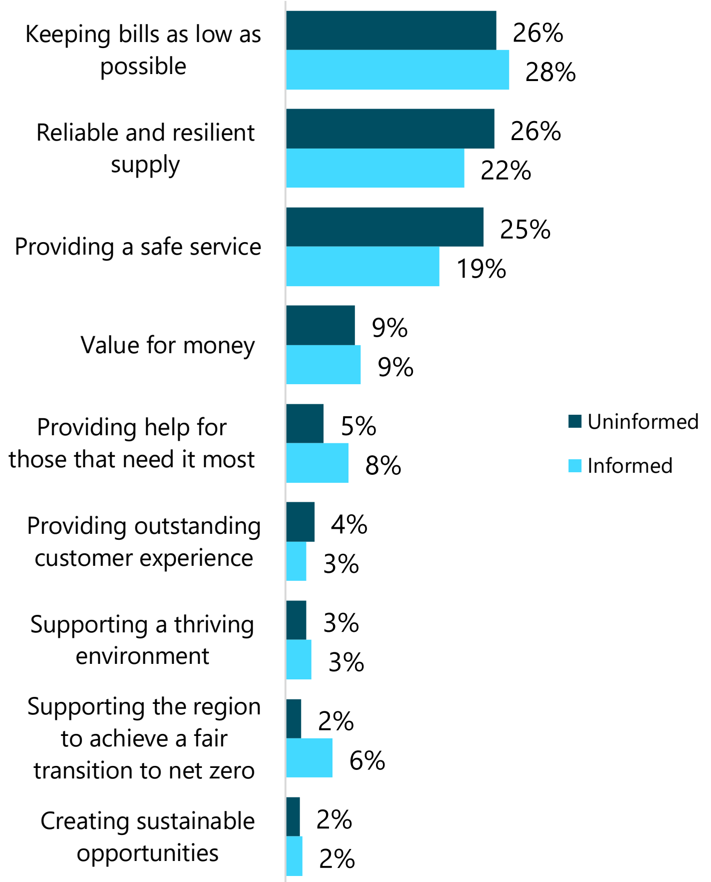
Brand perception (Top 5)



Future focus

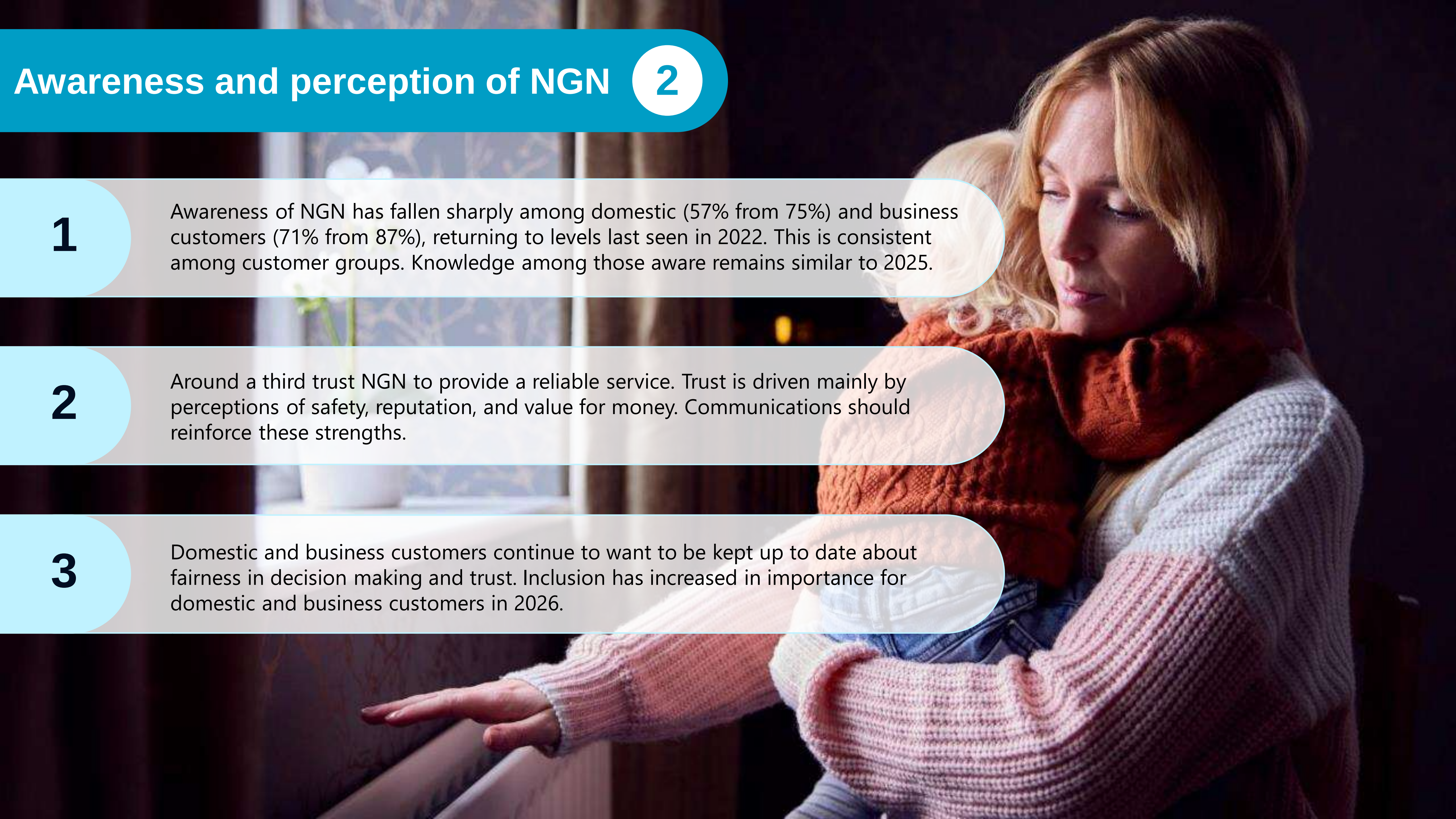
Focus on investments which will maintain current levels for today	16%
Evenly focus on investments which maintain levels today and futureproof	64%
Focus on longer-term resilience for the future	20%

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 6: Total 1302, Domestic: 1102, Business: 200. Q41 Future focus base: 602

Awareness and perception of NGN 2



1 Awareness of NGN has fallen sharply among domestic (57% from 75%) and business customers (71% from 87%), returning to levels last seen in 2022. This is consistent among customer groups. Knowledge among those aware remains similar to 2025.

2 Around a third trust NGN to provide a reliable service. Trust is driven mainly by perceptions of safety, reputation, and value for money. Communications should reinforce these strengths.

3 Domestic and business customers continue to want to be kept up to date about fairness in decision making and trust. Inclusion has increased in importance for domestic and business customers in 2026.

Awareness and perception of NGN

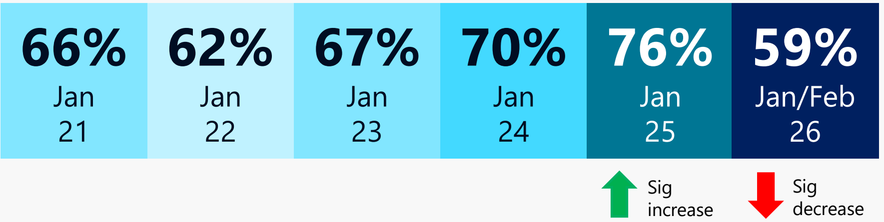
Awareness

2

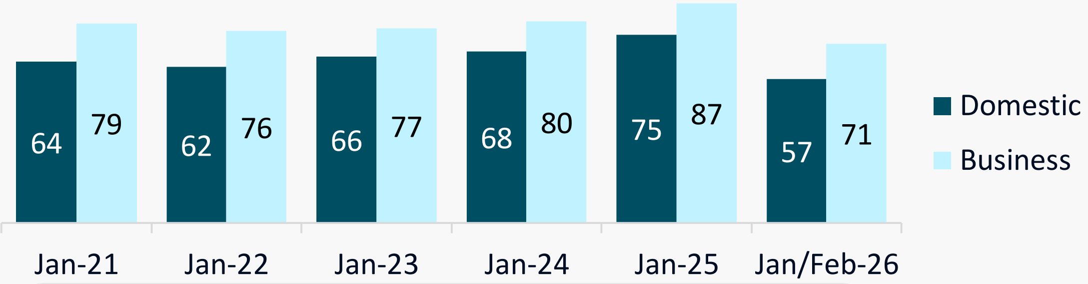
TRACKING QUESTION(S)

Awareness of NGN has dropped significantly across domestic and business customers and is now closer to 2022 levels. The decline is consistent among customer groups. This may be partly influenced by reduced engagement around hydrogen over the past 12 months. For those who have heard of NGN, level of knowledge remains at similar levels as in 2025.

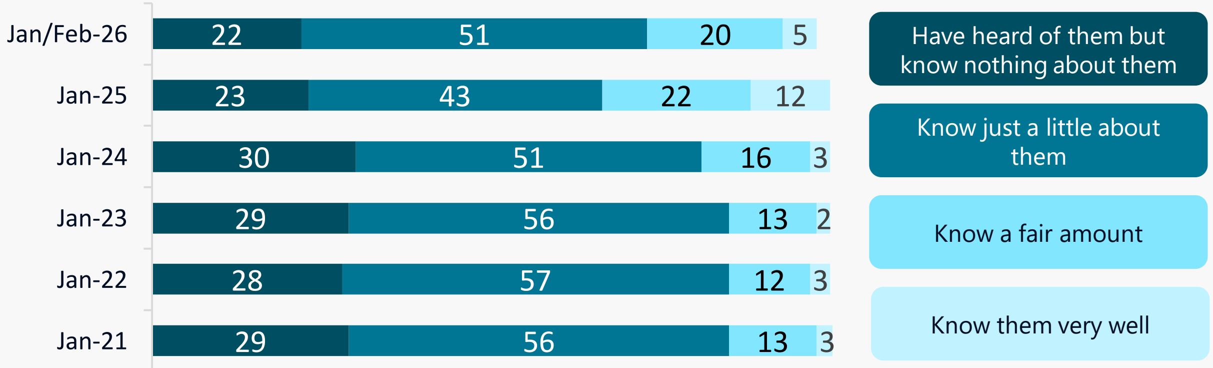
Awareness of NGN - Overall



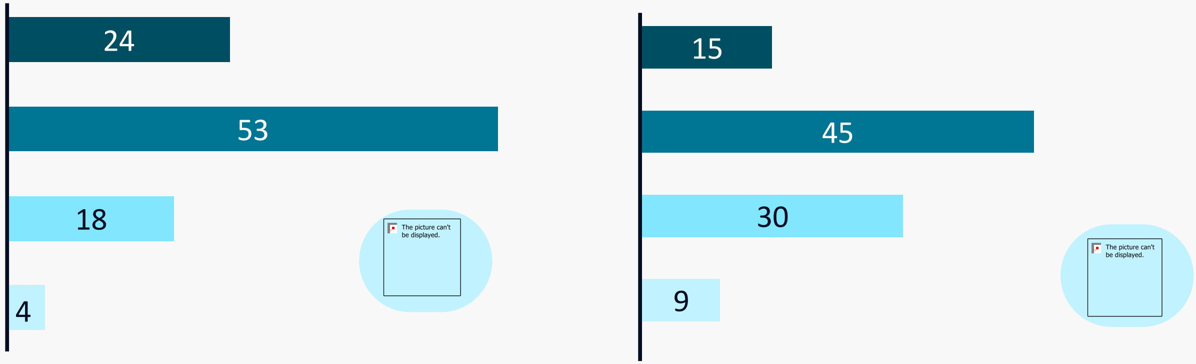
Awareness of NGN – Domestic vs Business



Knowledge of NGN – Overall Wave 6
All who have heard of NGN



Knowledge of NGN – Domestic vs Business wave 6
All who have heard of NGN



Q14. Had you previously heard of Northern Gas Networks? / Q15. How well do you feel you know NGN and the services it is responsible for? (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: 1223, Business: 200) (Weighted base; Wave 6; 1302, Domestic: 1102, Business: 200)

Drivers of trust

How can NGN drive trust upwards

2

Trust that NGN will do the right thing is higher for men, older customers (age 70+) and those who pay bills without any difficulty

CHAID ANALYSIS

TRUST
29% (1302)

(24% 2025)

Q51 Statements which apply to NGN – Puts safety first when completing work

Not mentioned
TRUST
18% (822)

TRUST
48% (480)
Yes

Q51 Statements which apply to NGN – Has a good reputation

TRUST
66% (207)
Yes

Q51 Statements which apply to NGN – Provides great value for money

TRUST
84% (104)
Yes

Trust comes from a perception of safety, reputation and value for money. Building on NGN's reputation in general (and for safety) whilst providing value for money should be emphasised in comms.

Trust (I trust them to do the right thing)
29%

Trust increases from 29% to **48%** if customers associate NGN with **putting safety first when completing work**

Trust increases further to **66%** if customers also associate NGN with **having a good reputation**

Trust increases further to **84%** if customers also associate NGN with **providing great value for money**

Trust drops to **18%** if customers don't associate NGN with **putting safety first**

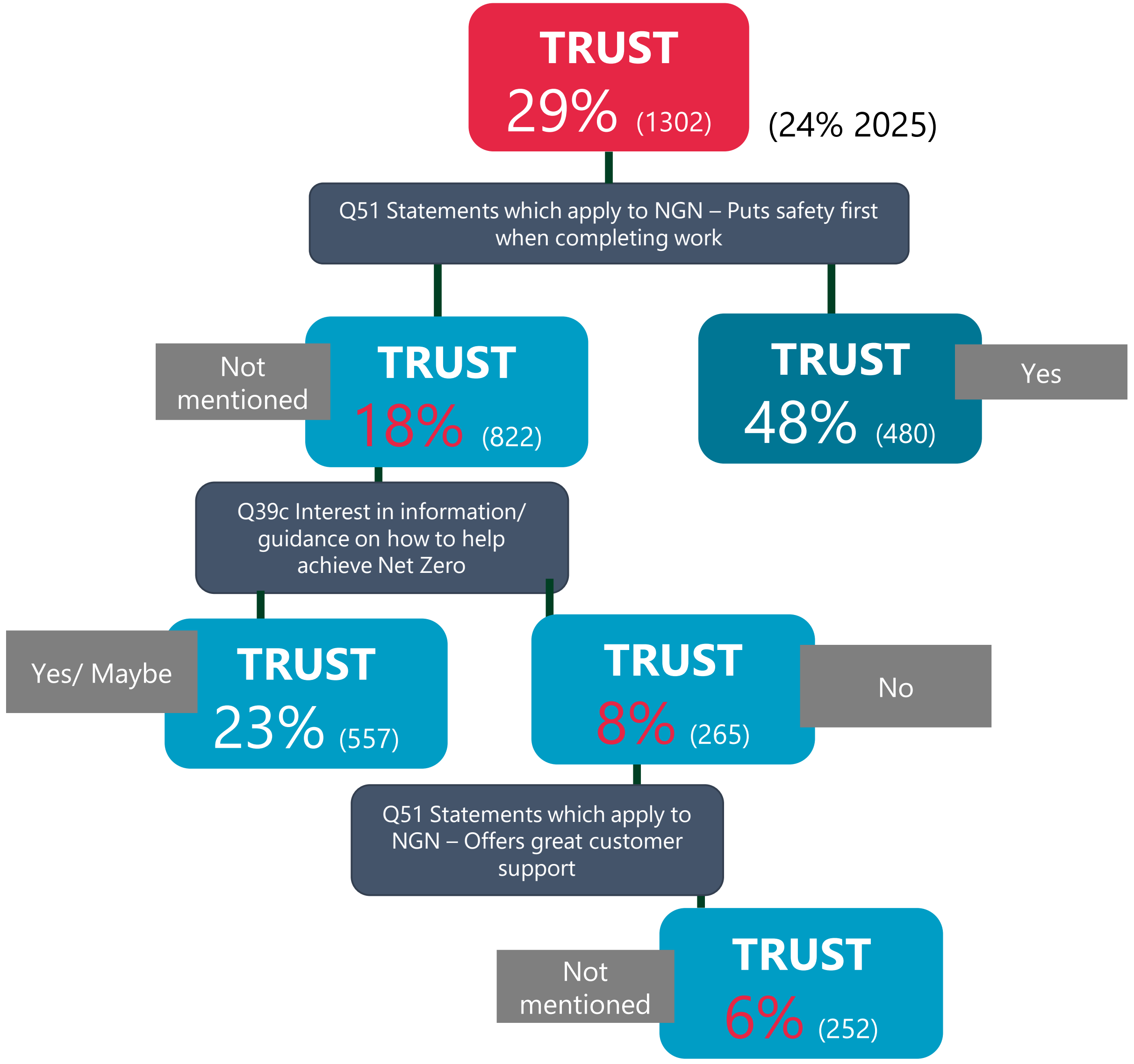
Q51. Which of the following statements apply to NGN – I trust them to do the right thing. Weighted base: 1302 (total)

Drivers of trust

What will drive trust **downwards**

2

CHAID ANALYSIS



Beyond a perception that NGN put safety first is showing great customer support and encouraging engagement with net zero.

Trust (I trust them to do the right thing) **29%**

Trust decreases from 29% to **18%** if customers don't associate NGN with **putting safety first**

Trust decreases further to **8%** if customers are **not interested in how to help achieve Net Zero**

Trust decreases further to **6%** if customers also don't associate NGN with **great customer support**

Q51. Which of the following statements apply to NGN – I trust them to do the right thing. Weighted base: 1302 (total)

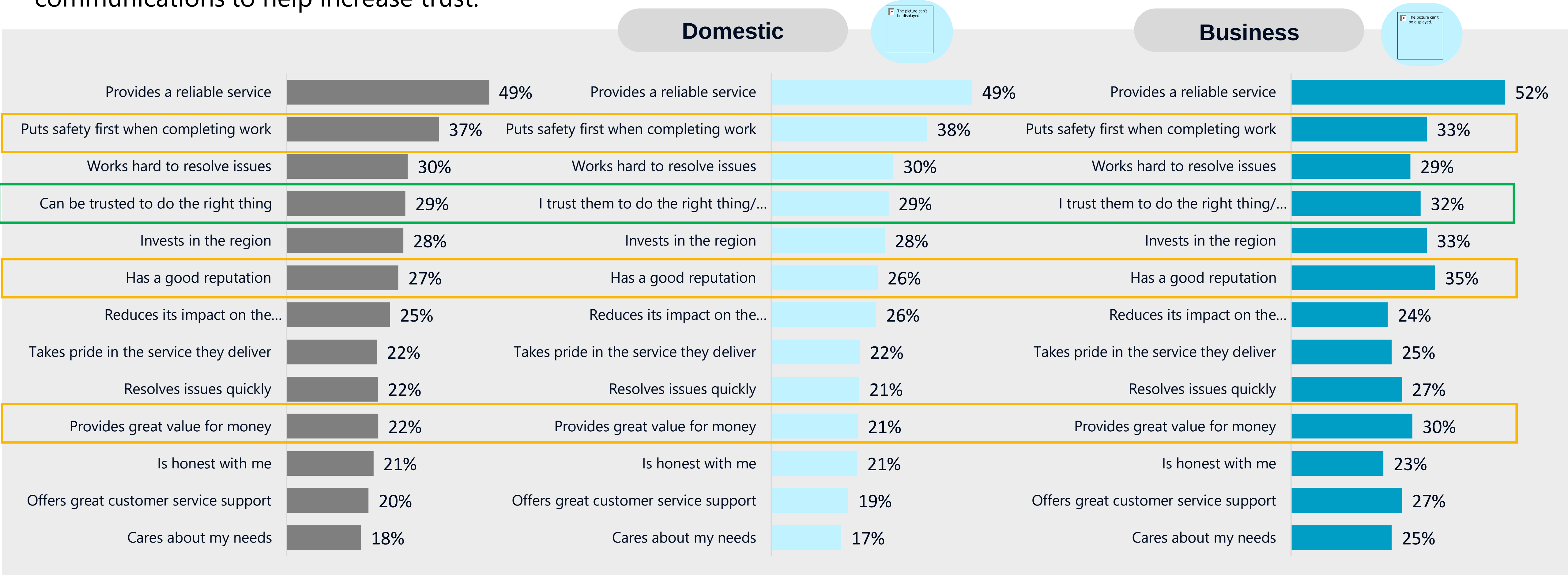
Awareness and perception of NGN

Brand perceptions

2

QUESTION ADDED IN WAVE 5

Nearly half of customers feel NGN provides a reliable service (increasing from 40% to 49%). Around a third feel NGN puts safety first, works hard to resolve issues, can be trusted to do the right things and invests in the region.
Reinforcing NGN's reputation and safety record while demonstrating value for money should be a key message in communications to help increase trust.



Q51. Which of the following statements do you think apply to NGN?
Weighted base; Wave 6; 1302, Domestic: 1102, Business: 200

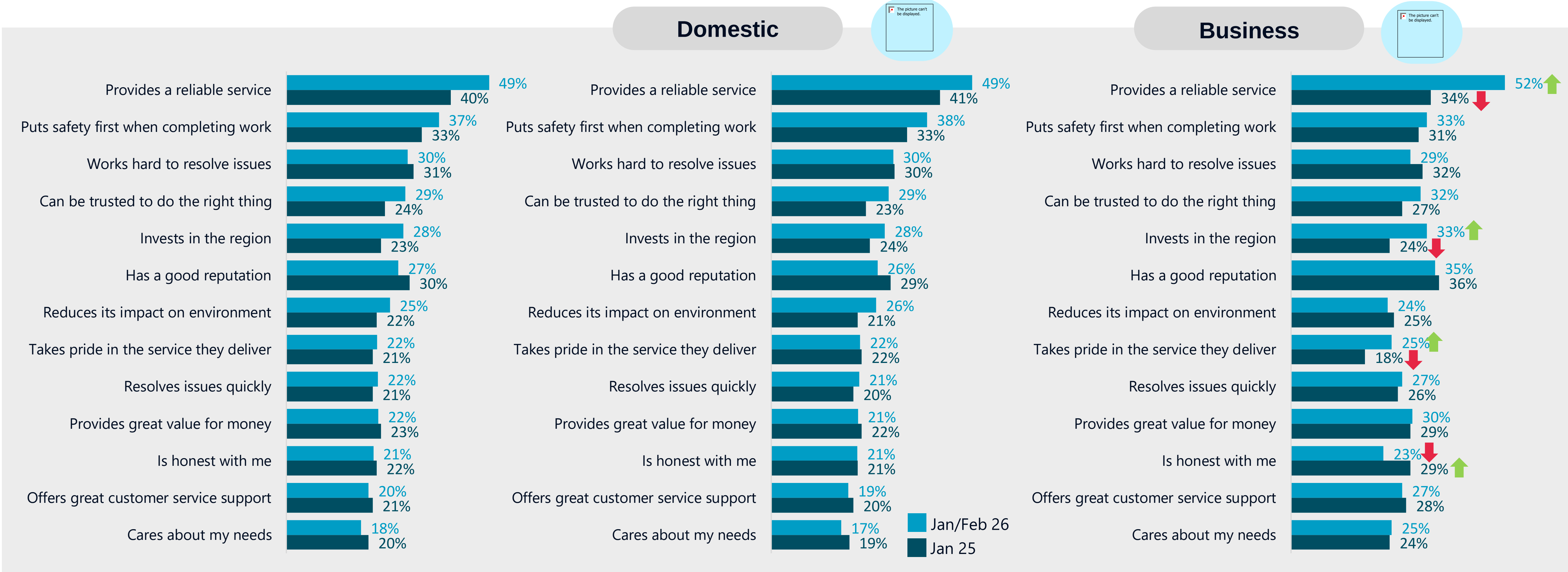
Awareness and perception of NGN

Brand perceptions

2

QUESTION ADDED IN WAVE 5

Business customers are significantly more likely to feel NGN provides a reliable service this wave, and that NGN invests in the region and takes pride in the service they are providing.



Q51. Which of the following statements do you think apply to NGN?
Weighted base: (wave 5: Domestic: 1223, Business: 200, Weighted base; Wave 6; 1302, Domestic: 1102, Business: 200

Significantly higher/lower

Customer priorities

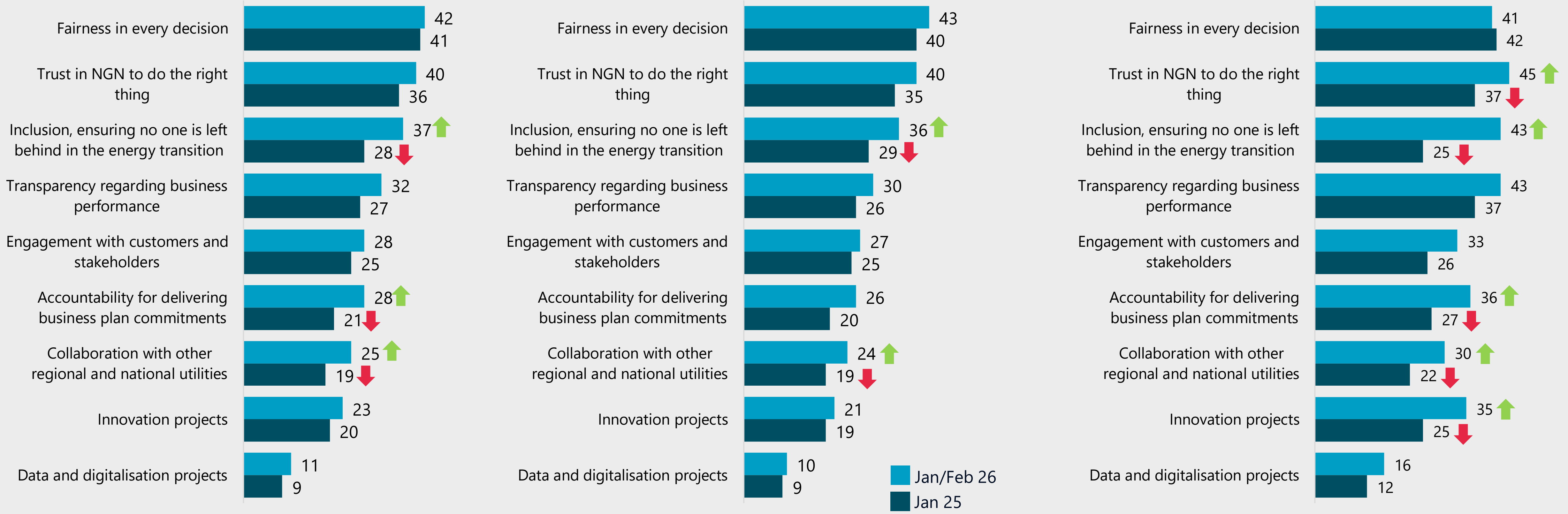
What do customers want to be kept up to date about?

2

QUESTION ADDED IN WAVE 5

Domestic and business customers continue to expect clear communication about fairness in decision-making and overall trust. In 2026, inclusion (ensuring no one is left behind in the energy transition) has become increasingly important for both groups. Customers also want greater transparency around trust, with this being a particularly strong priority for business customers.

Overall | **Domestic** | **Business**



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 6; 1302, Domestic: 1102, Business: 200

Significantly higher/lower

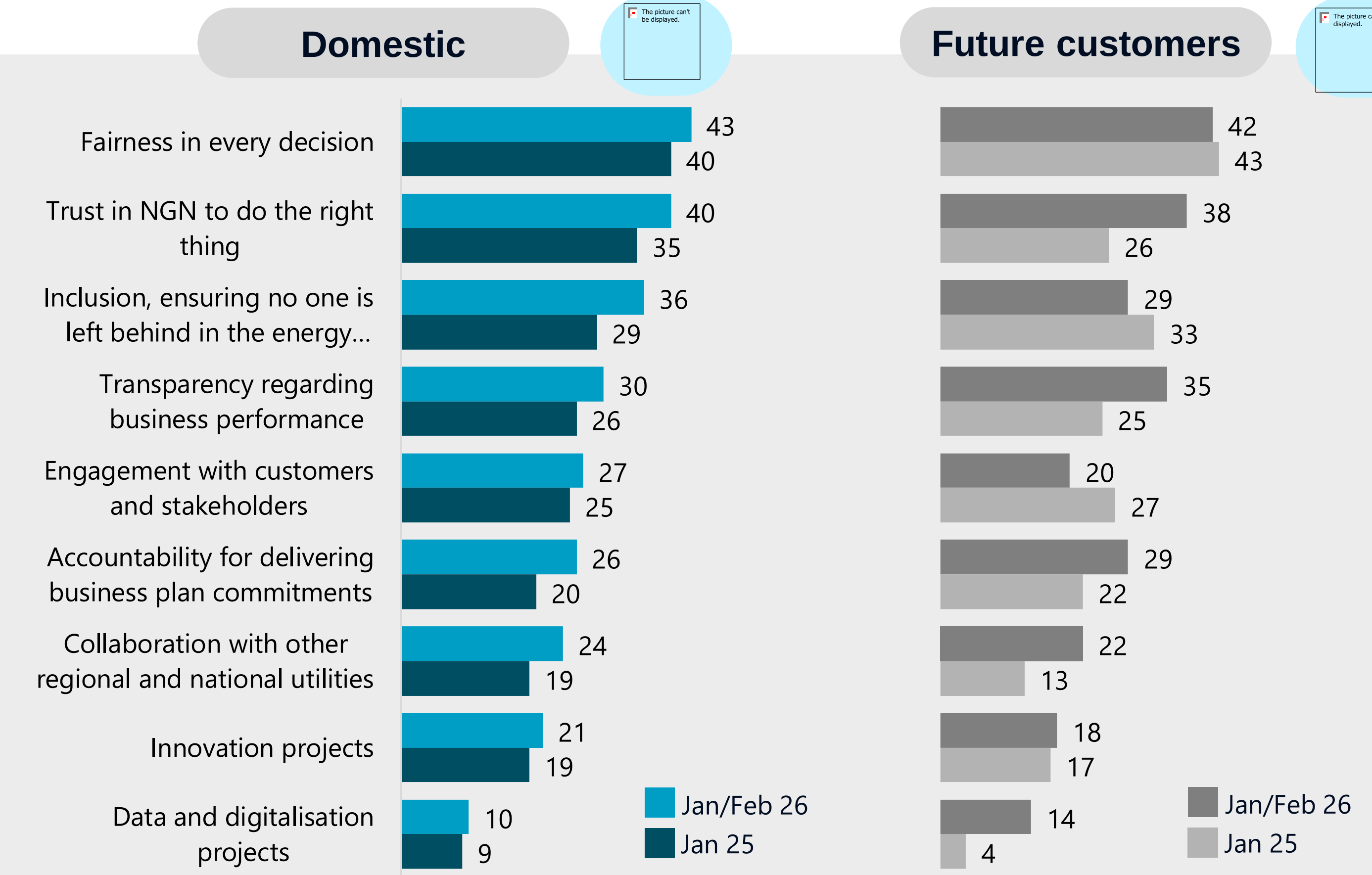
Customer priorities

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

2

TRACKING QUESTION(S)

Future customers surveyed also want to understand about fairness in decision making.



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, Weighted base; Wave 6: Domestic: 1102, Future: 58

Customer energy use and priorities 3

1 **Cost pressures** dominate and shape customer views. **Keeping bills low** remains the strongest priority for domestic and business customers. Nearly half of domestic customers continue to struggle with bills, and 58% self-ration, especially those financially vulnerable or PSR-eligible. Concern about energy spend is easing but still high. Three-quarters remain concerned about energy spend with businesses showing modest financial recovery.

2 **Reliability and safety** remain core expectations and sit alongside cost as the "non-negotiables". Future customers (and feedback from the YIC) place a stronger priority on providing help for those who need it most and supporting the region to achieve net zero (after affordability and safety).

3 Education changes the priority balance. Top three priorities take 77% of uninformed votes but fall to 69% when informed — showing that education helps customers recognise the role of lower-ranked areas (e.g., net zero, digitalisation, collaboration).

4 Vulnerable and digitally disengaged customers require tailored support. These groups prioritise low bills and value for money even more strongly and engage less with net zero or innovation, meaning communication must meet them "where they are."

5 40% of domestic customers (and 57% of business) think their priorities for NGN will change in the next five years. Key reasons are rising energy costs, changes in personal circumstances, government policy, technological change in energy systems and environmental awareness.

Energy use and concerns

Paying energy bills

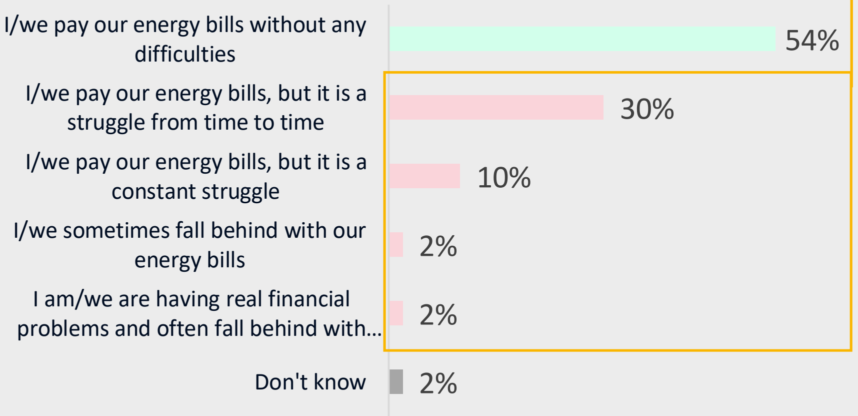
3

TRACKING QUESTION(S)

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

Paying your energy bill - overall

	Jan 21	Jan 22	Jan 23	Jan 24	Jan 25	Jan/Feb 26
Pay without difficulty	**66%**	**53%**	**44%**	**49%**	**48%**	**54%**
Pay with difficulty	**33%**	**46%**	**55%**	**48%**	**50%**	**44%**



Domestic

	Jan 21	Jan 22	Jan 23	Jan 24	Jan 25	Jan/Feb 26
Pay without difficulty	**66%**	**53%**	**44%**	**49%**	**48%**	**53%**
Pay with difficulty	**33%**	**46%**	**55%**	**48%**	**50%**	**45%**

Business

	Jan 21	Jan 22	Jan 23	Jan 24	Jan 25	Jan/Feb 26
Pay without difficulty	**69%**	**58%**	**48%**	**49%**	**65%**↑	**60%**
Pay with difficulty	**19%**	**35%**	**43%**	**41%**	**36%**	**38%**

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, Weighted base; Wave 6; 1302, Domestic: 1102, Business: 200)

↑↓ Significantly higher/lower than total

Energy use and concerns

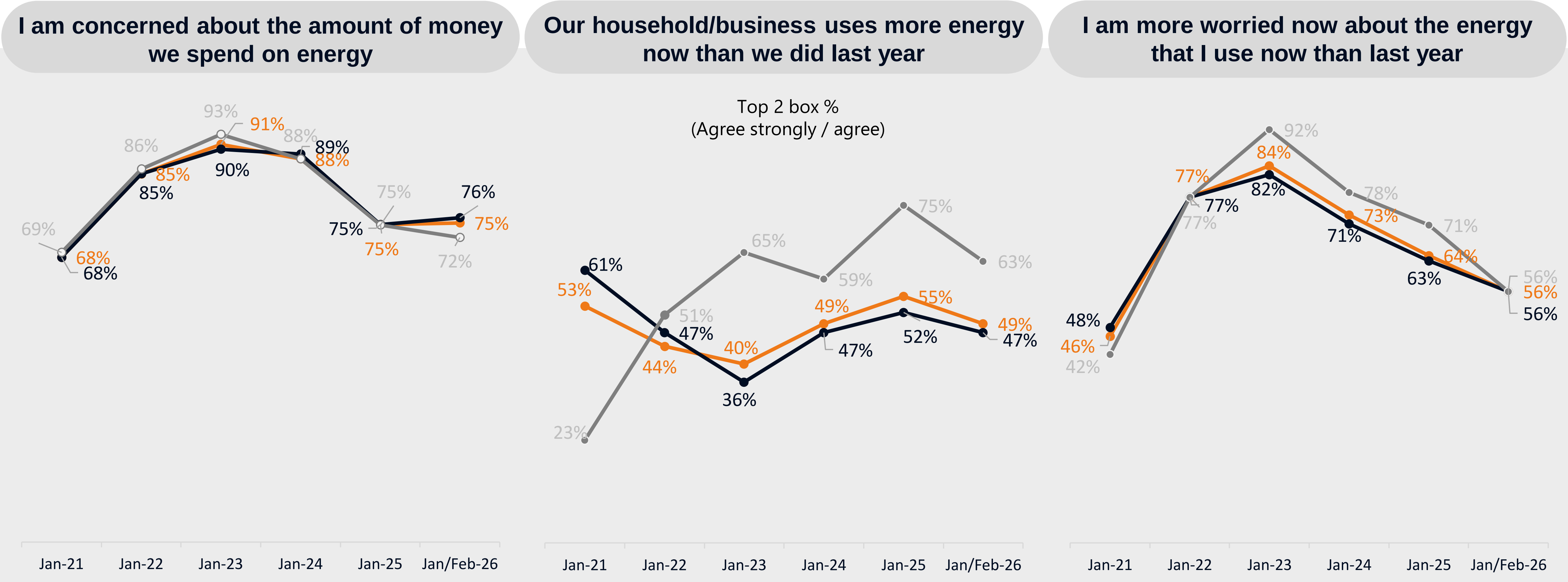
3

Agreement about energy usage and cost

TRACKING QUESTION(S)

Total
Domestic
Business

Concern about energy spend has reduced a little in the last two waves, although around three quarters remain concerned. Perceived usage has decreased slightly (particularly for business customers), as has worry about the amount of energy used.



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, Weighted base; wave 6: 651, Domestic: 551, Business: 100)

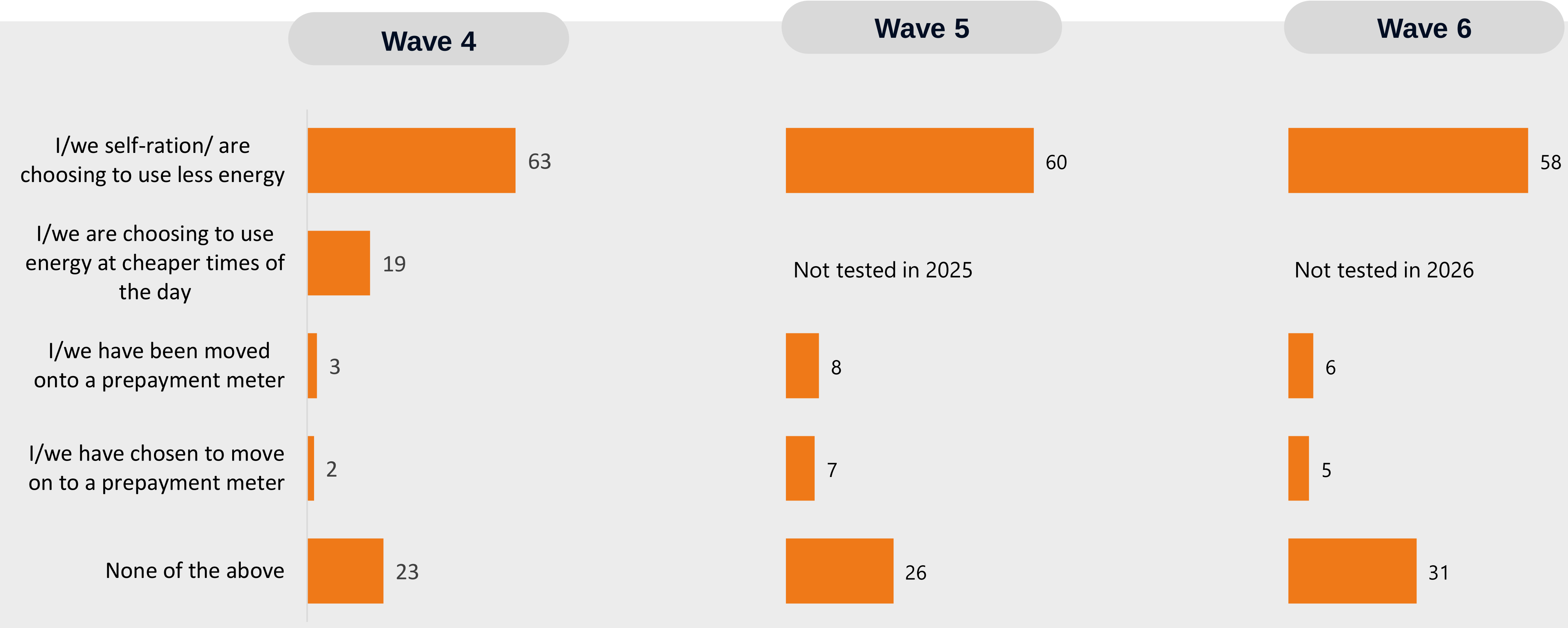
Energy use and concerns

Impact of energy crisis

3

TRACKING QUESTION(S)

The proportion of people who are self rationing and trying to use less energy has marginally decreased in the last two years. Those who struggle to pay their bills or who are eligible for PSR are also more likely to self-ration energy.



Those who are eligible for the PSR (62%) and struggle to pay bills (67%) are more likely to self-ration.

C6. Do any of the following apply to you? Weighted base; Wave 5: 1,423, Domestic: 1,223, New question in wave 4, Weighted based; Wave 6: Domestic: 1,102

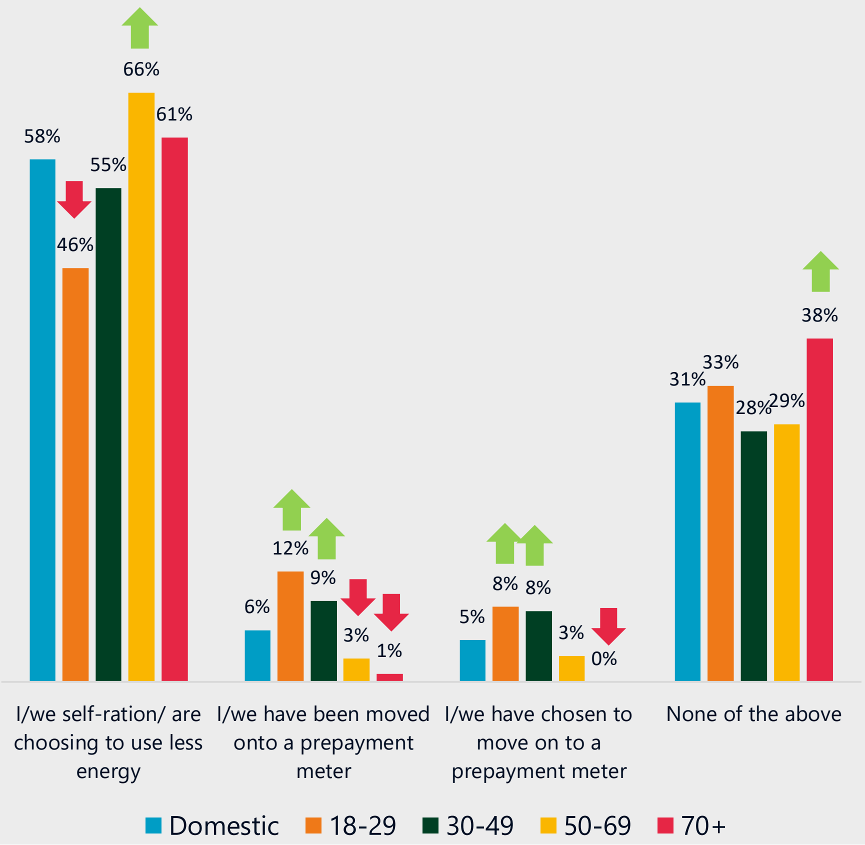
Energy use and concerns

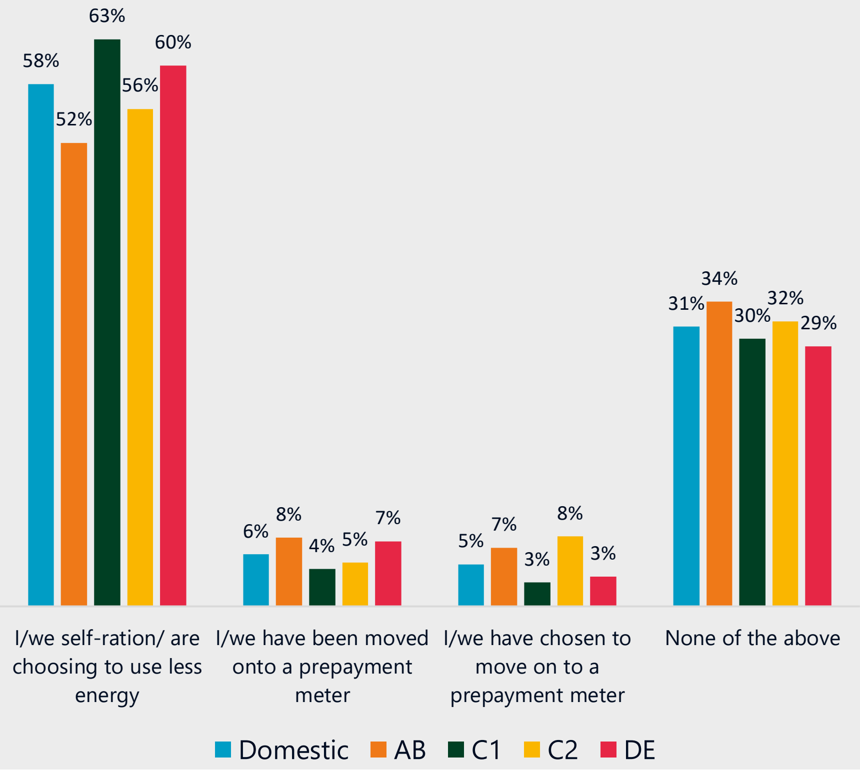
Impact of energy crisis – by subgroup

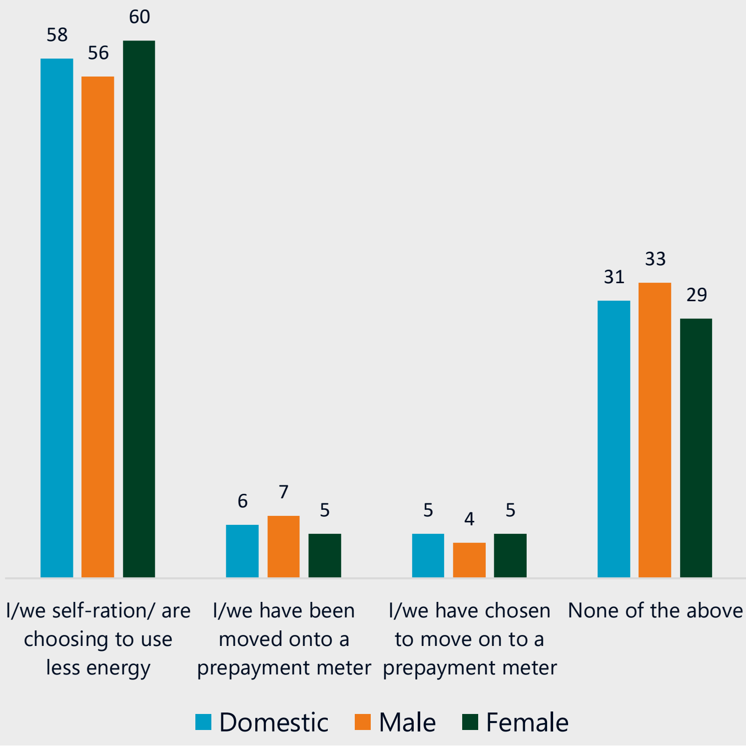
3

TRACKING QUESTION(S)

50-69 year olds are more likely to self-ration, and 70+ year olds more likely to not have changed the way they use energy.







C6. Do any of the following apply to you? Weighted base: Wave 6: Domestic: 1,102

Significantly higher/lower than total

Energy use and concerns

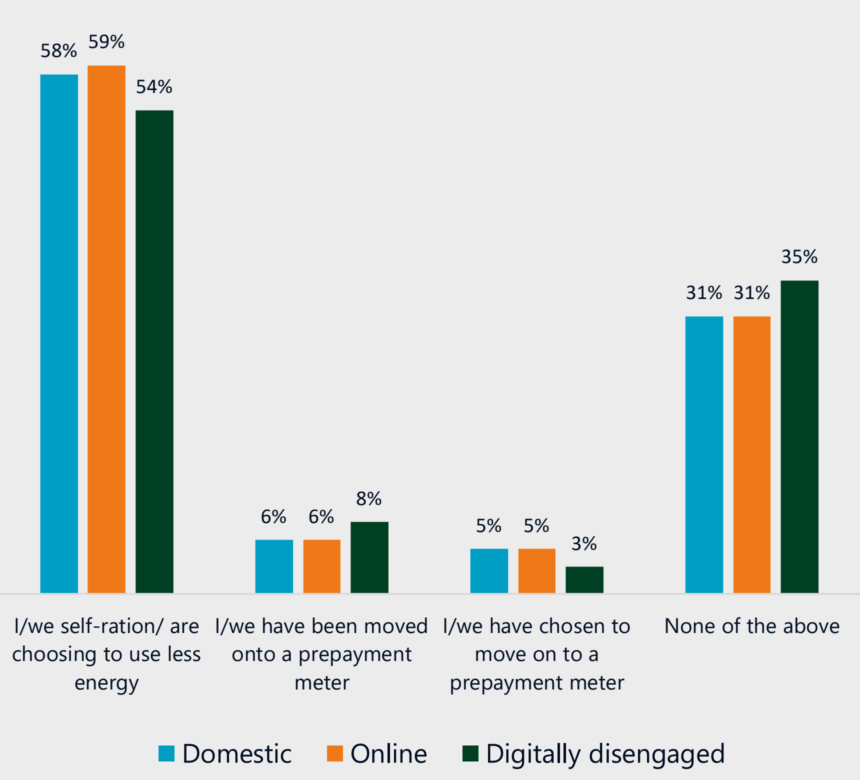
Impact of energy crisis – by subgroup

3

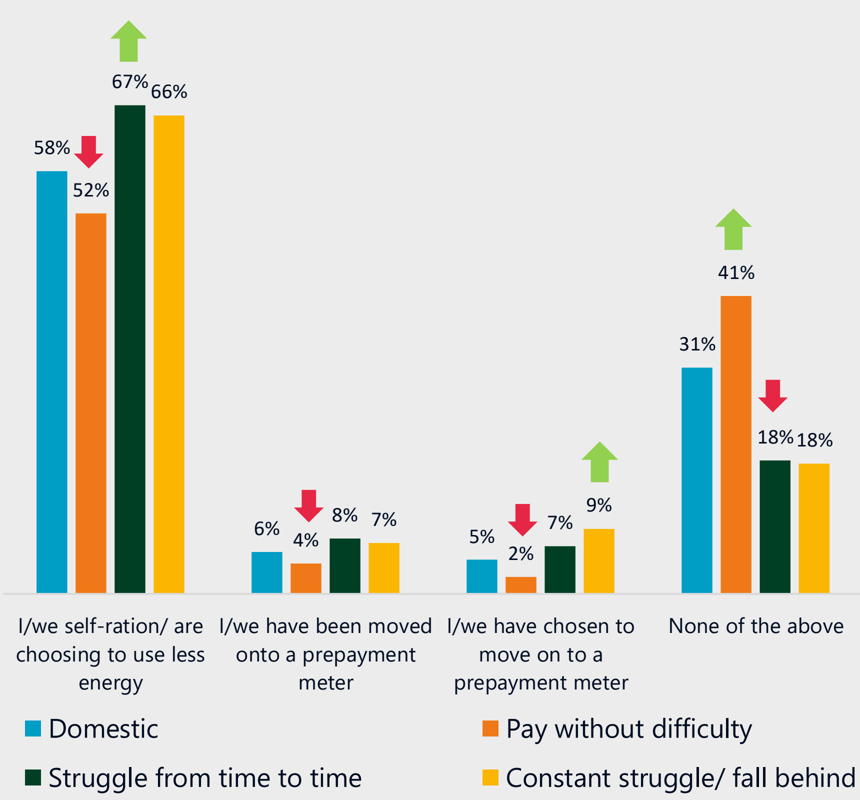
TRACKING QUESTION(S)

Those who struggle to pay their bills or who are eligible for PSR are also more likely to self-ration.

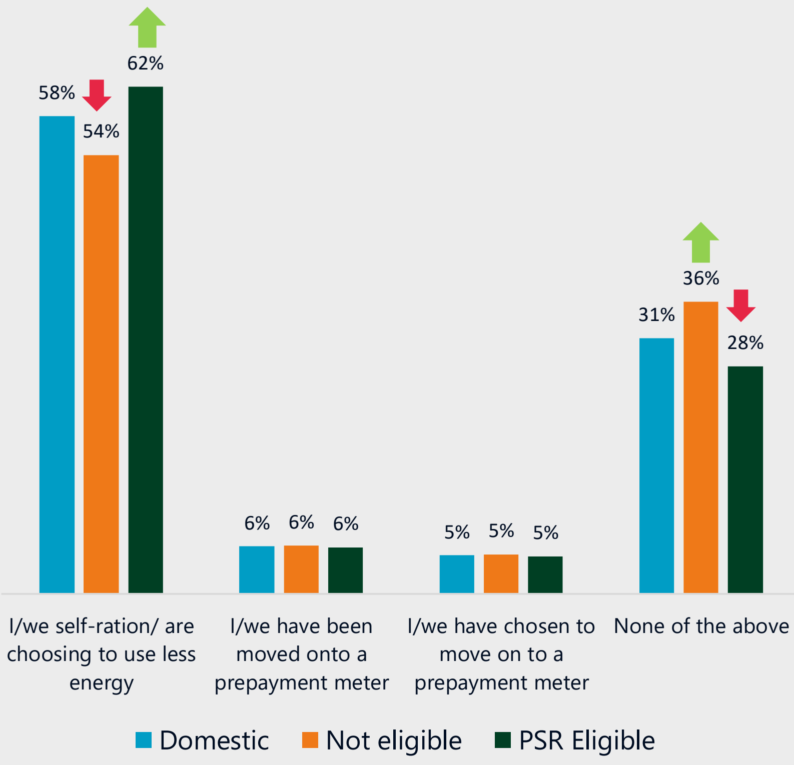
Digital status by financial hardship



Bill payment by financial hardship



PSR eligibility by financial hardship



C6. Do any of the following apply to you? Weighted base: Wave 6: Domestic: 1,102

Significantly higher/lower than total

Customer priorities

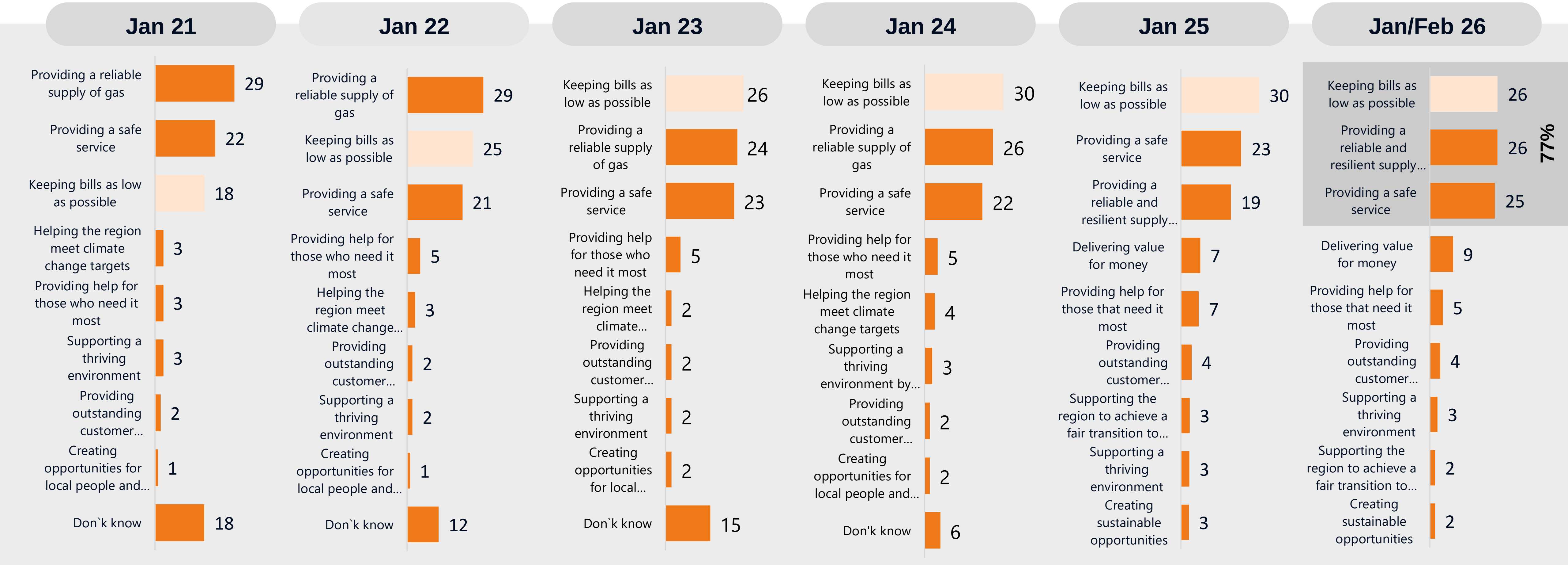
Customers uninformed priorities - overall

3

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.

TRACKING QUESTION(S)

Keeping bills as low as possible continues to be of the utmost importance.
Equally important this wave is providing a reliable, resilient supply and a safe service.



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, Weighted base; Wave 6; 1302, Domestic: 1102, Business: 200)

Customer priorities

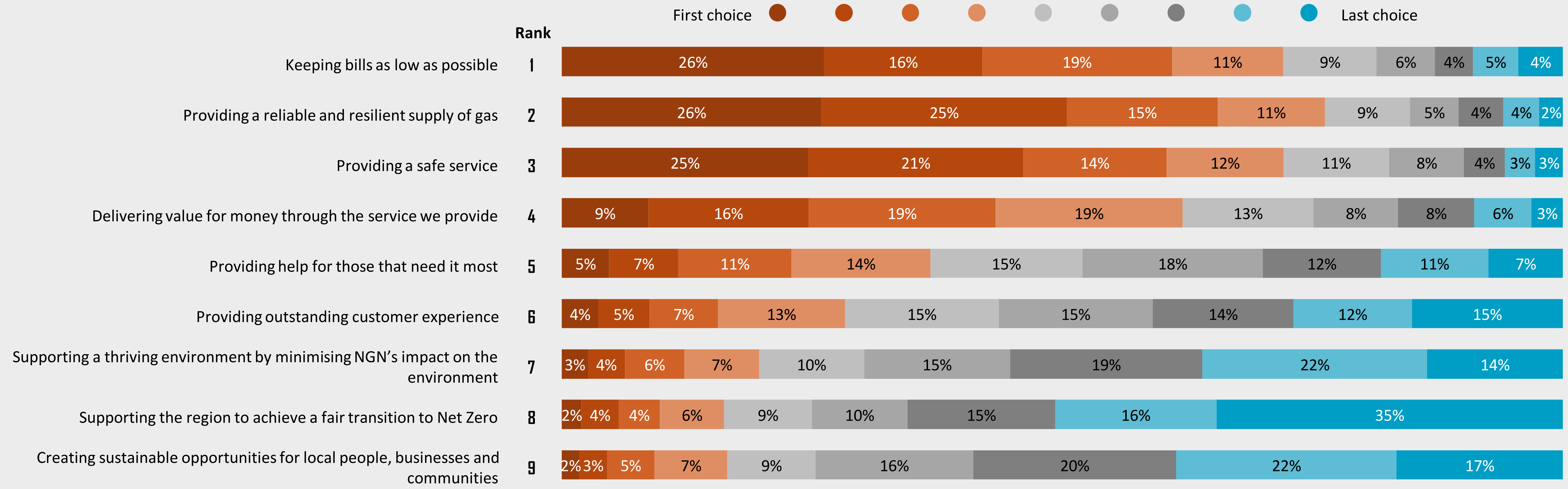
Customers <u>uninformed</u> priorities - overall

3

TRACKING QUESTION(S)

Areas relating to cost / value for money, reliability and safety are by far the most important priorities. In contrast, anything to do with the environment is consistently lowest on the priority list.

Wave 6 – Total sample



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

Weighted base: Wave 6: Total sample: 1302

Customer priorities

Customers uninformed priorities - by business / domestic

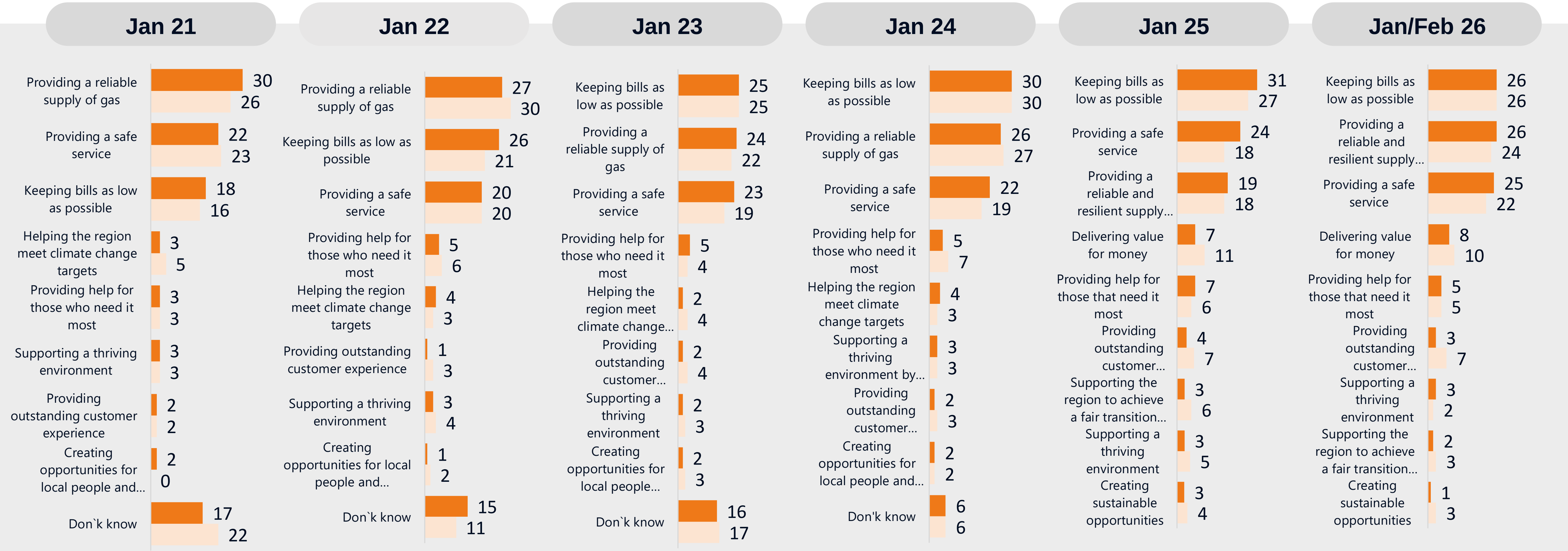
3

TRACKING QUESTION(S)

Domestic

Business

Both domestic and business customers prioritise keeping bills as low as possible.
Safety and reliability are marginally more important for domestic customers.



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, Weighted base; Wave 6; 1302, Domestic: 1102, Business: 200)

Customer priorities

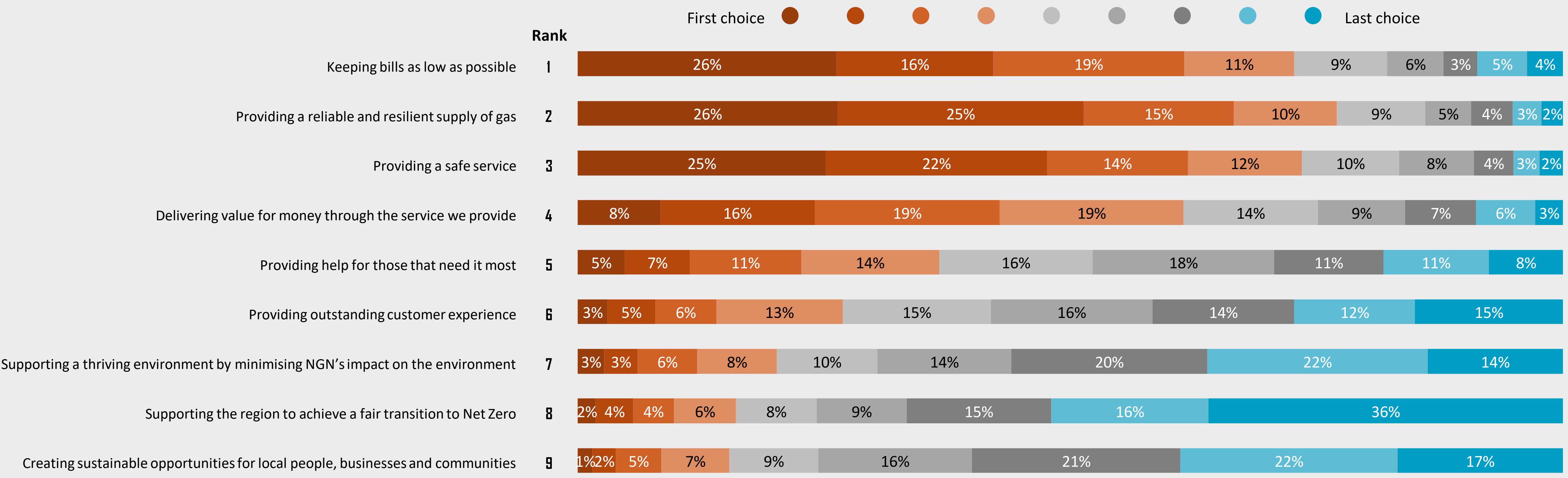
Customers uninformed priorities - domestic

3

TRACKING QUESTION(S)

For domestic customers it is no different: cost, reliability and safety are paramount, whilst areas focusing on the environment are most likely their last priority.

Wave 6 – Domestic



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
Weighted base: Domestic: 1102

Customer priorities

3

Customers uninformed priorities - by subgroup

TRACKING QUESTION(S)

Keeping bills low and value for money are more important for digitally disengaged and those struggling with their bills.
A reliable gas supply is more important to those who pay with no difficulty.

Age – Jan/Feb 26 Domestic

	Age			
	18-29	30-49	50-69	70+
Providing a reliable and resilient supply of gas	19% ↓	27%	27%	31%
Keeping bills as low as possible	27%	24%	28%	26%
Providing a safe service	21%	24%	27%	28%
Delivering value for money	9%	7%	9%	9%
Providing help for those that need it most	9% ↑	5%	4% ↓	3% ↓
Providing outstanding customer experience	5% ↑	5% ↑	1% ↓	2%
Supporting a thriving environment	4% ↑	4% ↑	2%	1%
Supporting the region to achieve a fair transition to Net Zero	4% ↑	2%	1%	1%
Creating sustainable opportunities	3% ↑	2%	1%	0% ↓

PSR Eligible – Jan/Feb 26 Domestic

	PSR Eligible	
	Yes	No
Providing a reliable and resilient supply of gas	25%	28%
Keeping bills as low as possible	27%	25%
Providing a safe service	26%	25%
Delivering value for money	9%	8%
Providing help for those that need it most	5%	4%
Providing outstanding customer experience	3%	4%
Supporting a thriving environment	2%	3%
Supporting the region to achieve a fair transition to Net Zero	1%	3%
Creating sustainable opportunities	1%	2%

SEG – Jan/Feb 26 Domestic

	SEG			
	AB	C1	C2	DE
Providing a reliable and resilient supply of gas	29%	29%	28%	20% ↓
Keeping bills as low as possible	18% ↓	24%	28%	33% ↑
Providing a safe service	28%	27%	21%	24%
Delivering value for money	9%	8%	9%	8%
Providing help for those that need it most	5%	4%	3% ↓	7% ↑
Providing outstanding customer experience	2% ↓	2% ↓	5% ↑	3%
Supporting a thriving environment	5% ↑	2%	3%	1% ↓
Supporting the region to achieve a fair transition to Net Zero	2%	2%	1%	2%
Creating sustainable opportunities	2%	1%	1%	2%

Digital status/Bills – Jan/Feb 26 Domestic

	Digital status		Bills	
	Digitally disengaged	Online	Pay without difficulty	Constant struggle / fall behind
Providing a reliable and resilient supply of gas	9% ↓	28%	32% ↑	20% ↓
Keeping bills as low as possible	37% ↑	25%	21% ↓	32% ↑
Providing a safe service	24%	25%	27%	23%
Delivering value for money	12% ↑	8%	7%	10% ↑
Providing help for those that need it most	11% ↑	4%	3% ↓	6% ↑
Providing outstanding customer experience	1% ↓	3%	2%	4%
Supporting a thriving environment	3%	3%	3%	2%
Supporting the region to achieve a fair transition to Net Zero	2%	2%	2%	1%
Creating sustainable opportunities	1%	2%	1%	2%

Q16. 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. Weighted based; Wave 6: Domestic: 1,102

↑↓ Significantly higher/lower than total

Customer priorities

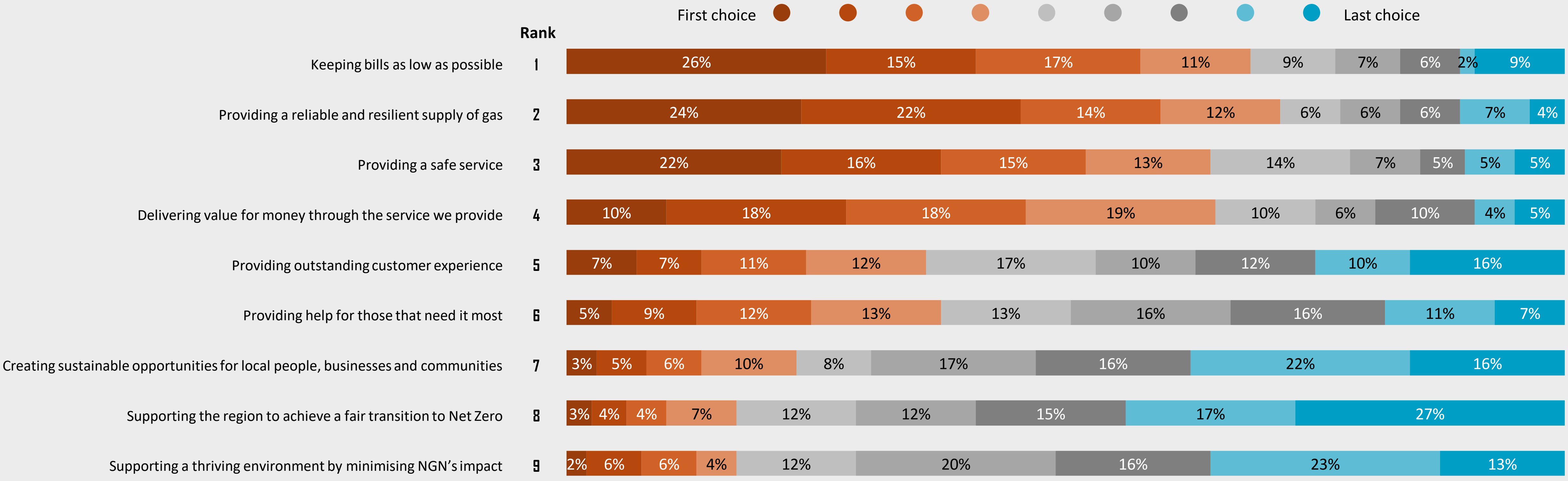
Customers <u>uninformed</u> priorities - business

3

TRACKING QUESTION(S)

For business customers, priorities are very much the same as for domestic customers, with areas relating to the environment being bottom of the list, and areas relating to cost, reliability and safety at the top.

Wave 6 – Business



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
Weighted base; Wave 6: Business: 200

Customer priorities

Customers uninformed priorities - by subgroup

3

TRACKING QUESTION(S)

Keeping bills low is significantly more important for smaller businesses and those who are already struggling to pay their bills

Size of business – Jan/Feb 26 Business

	Size of Business		
	1 – 49 employees	50 – 99 employees	100+ employees
Keeping bills as low as possible	45% ↑	35% ↑	20% ↓
Providing a reliable and resilient supply of gas	24%	12% ↓	26%
Providing a safe service	9% ↓	19%	25%
Delivering value for money	3% ↓	8% ↓	12% ↑
Providing outstanding customer experience	6%	12% ↑	6%
Providing help for those that need it most	3% ↓	8% ↑	4%
Creating sustainable opportunities	3%	4%	3%
Supporting the region to achieve a fair transition to Net Zero	3%	0%	3%
Supporting a thriving environment	3%	4%	1%

Ability to pay for bills – Jan/Feb 26 Business

	Bills	
	Pay without difficulty	Constant struggle / fall behind
Keeping bills as low as possible	20% ↓	36% ↑
Providing a reliable and resilient supply of gas	22%	24%
Providing a safe service	24%	19%
Delivering value for money	10%	9%
Providing outstanding customer experience	10% ↑	3% ↓
Providing help for those that need it most	5%	4%
Creating sustainable opportunities	3%	3%
Supporting the region to achieve a fair transition to Net Zero	3%	1%
Supporting a thriving environment	3%	1%

Q16. 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.
Weighted based; Wave 6: Business: 200, 1-49 employees: 33, 50-99 employees: 26, 100+ employees: 141; Pay without difficulty: 119, Constant struggle / fall behind: 75

↑↓ Significantly higher/lower than total

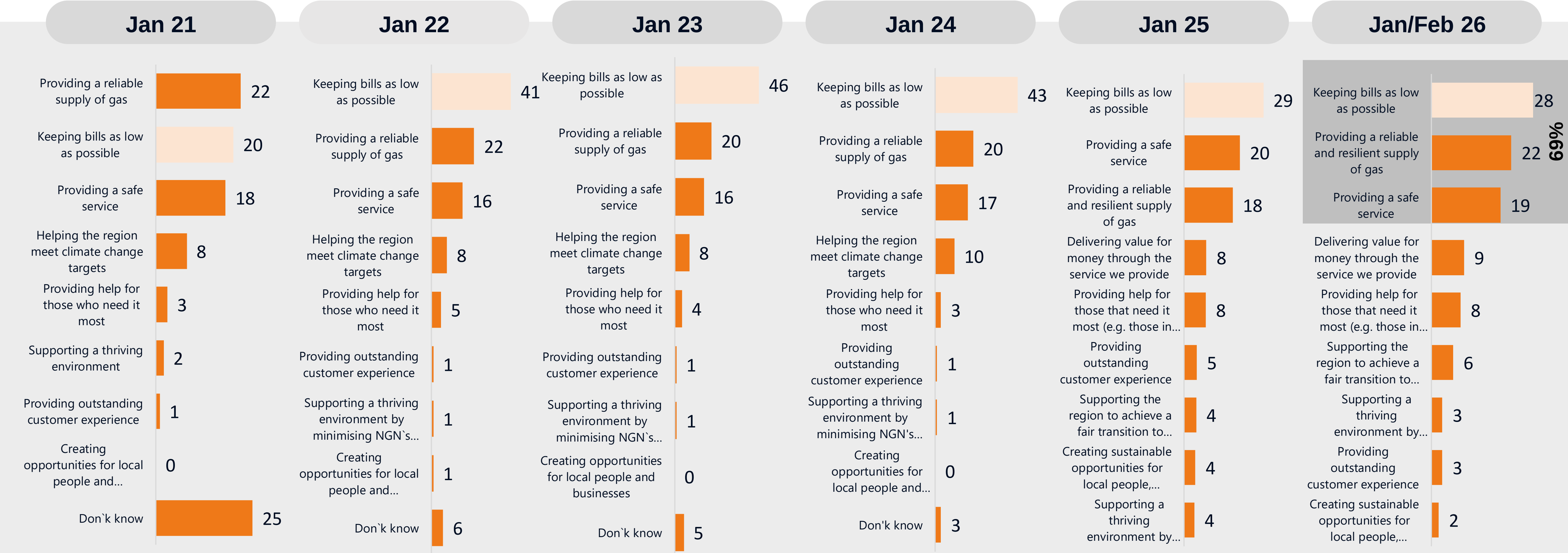
Customer priorities

3

TRACKING QUESTION(S)

Customers informed priorities - overall

Keeping bills as low as possible is consistent across uniformed and informed priorities in 2026, whereas providing a safe and reliable service is seen as less important once informed. The top three priorities account for 77% of uninformed responses and 69% of informed responses, suggesting that education helps broaden consumer interests. This also indicates a need for clearer communication about how lower-ranking priorities contribute to the outcomes consumers value most.



Q42. 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, Weighted base; wave 6: 1302, Domestic: 1102, Business: 200)

Customer priorities

Customers uninformed vs informed priorities - overall

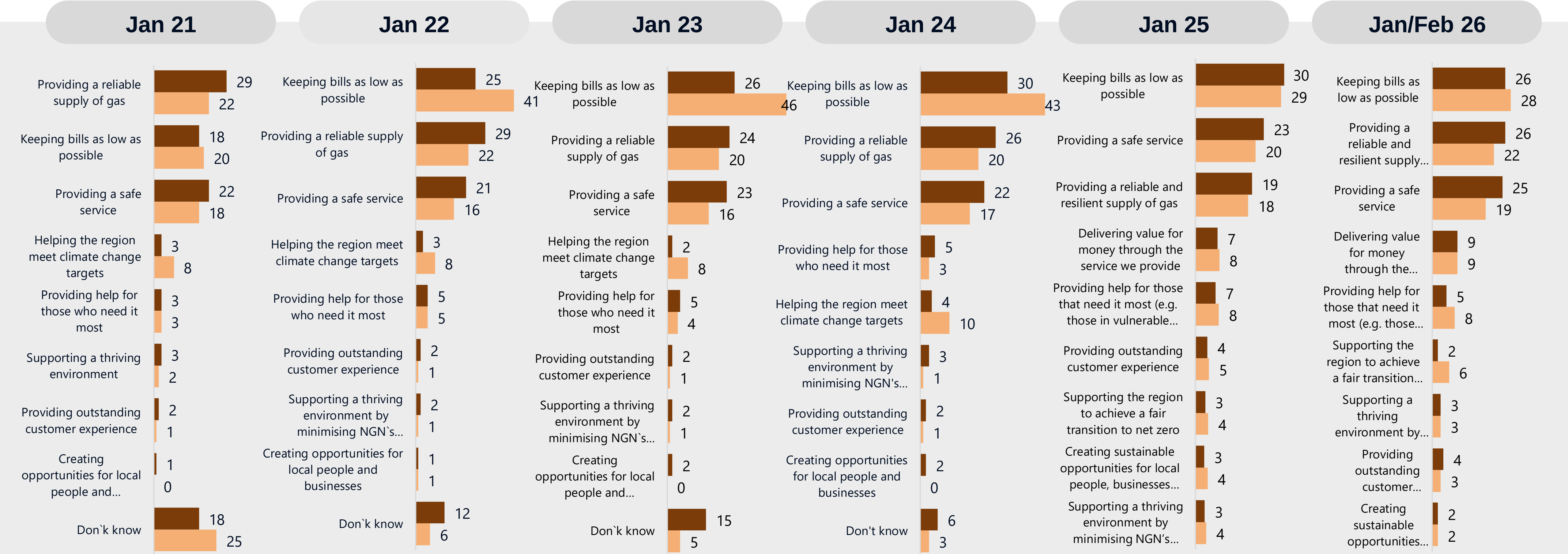
3

TRACKING QUESTION(S)

Uninformed

Informed

In 2026, uniformed and informed priorities are relatively consistent, with keeping bills low a little higher once informed, and providing a safe service and reliable supply a lower in priority once informed.



Q16 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, weighted base: wave 6: 1302) Q42. 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.

Customer priorities

Customers informed priorities - by business / domestic

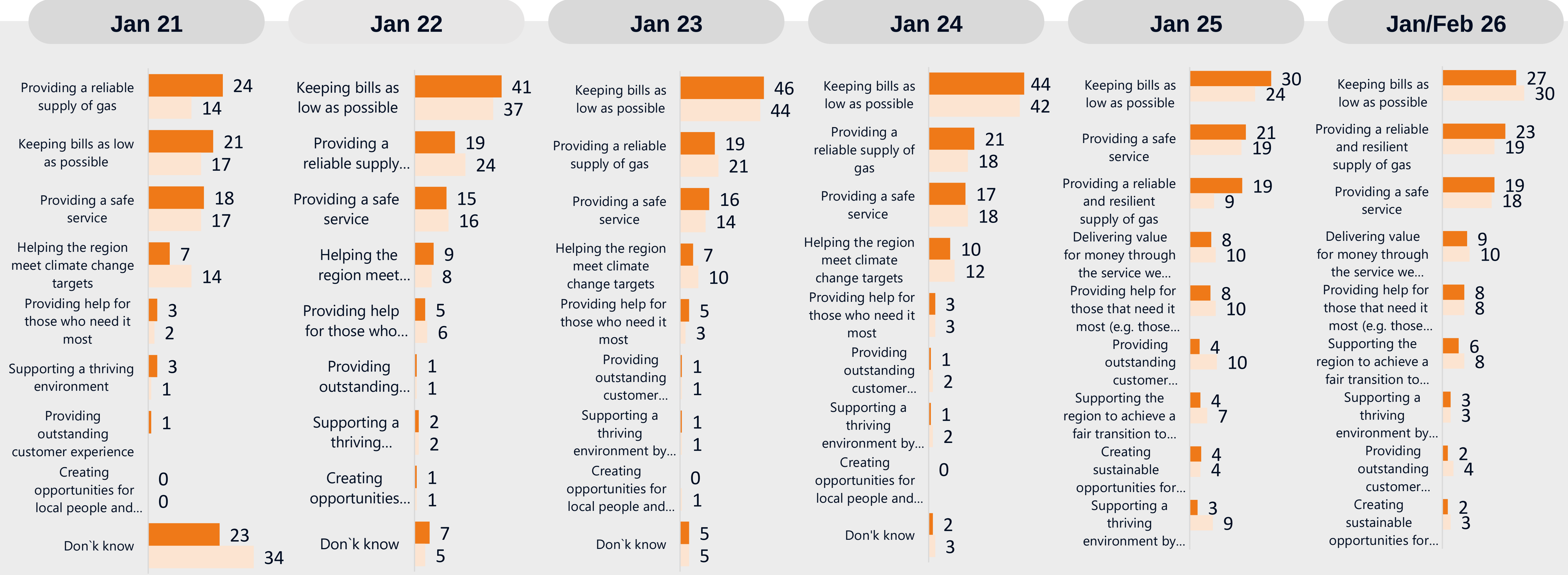
3

TRACKING QUESTION(S)

Domestic

Business

The top three informed priorities are the same for domestic and business customers: keeping bills low, safety and reliability.



Q42. 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, Weighted base; wave 6: 1302, Domestic: 1102, Business: 200))

Significantly higher/lower than total

Customer priorities

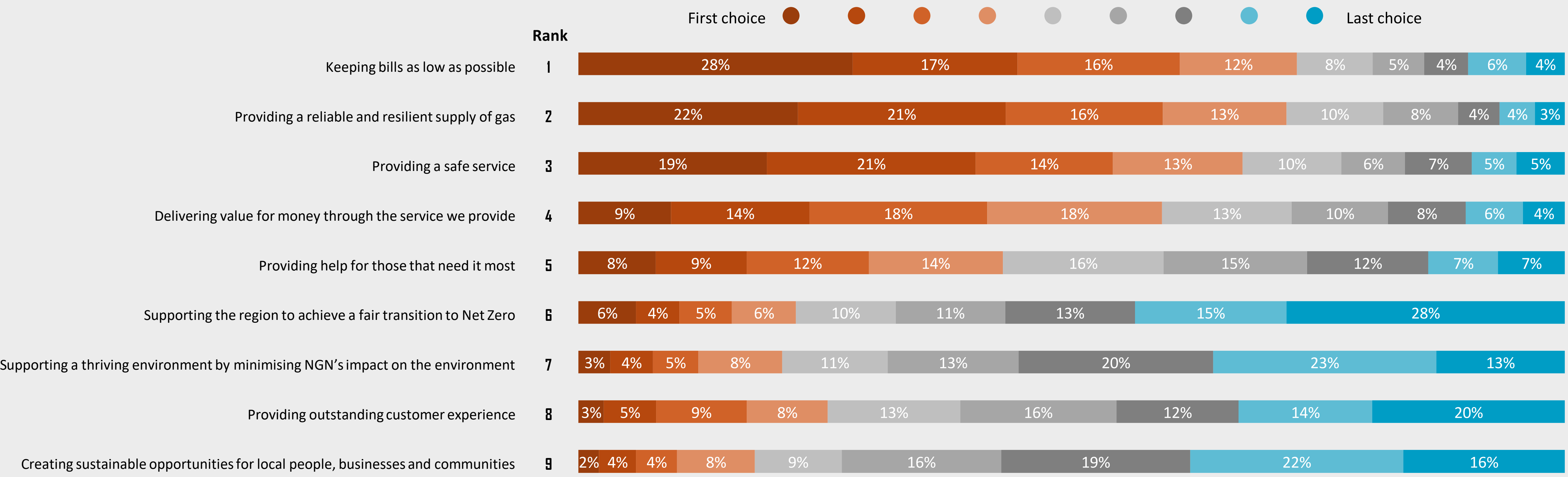
Customers informed priorities - overall

3

TRACKING QUESTION(S)

Once informed, priorities remain centred on cost, reliability / resilience and safety, with environmental areas and customer service lowest in priority

Wave 6 – Total sample



Q42. 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. Weighted base: Wave 6: Total sample: 1302

Customer priorities

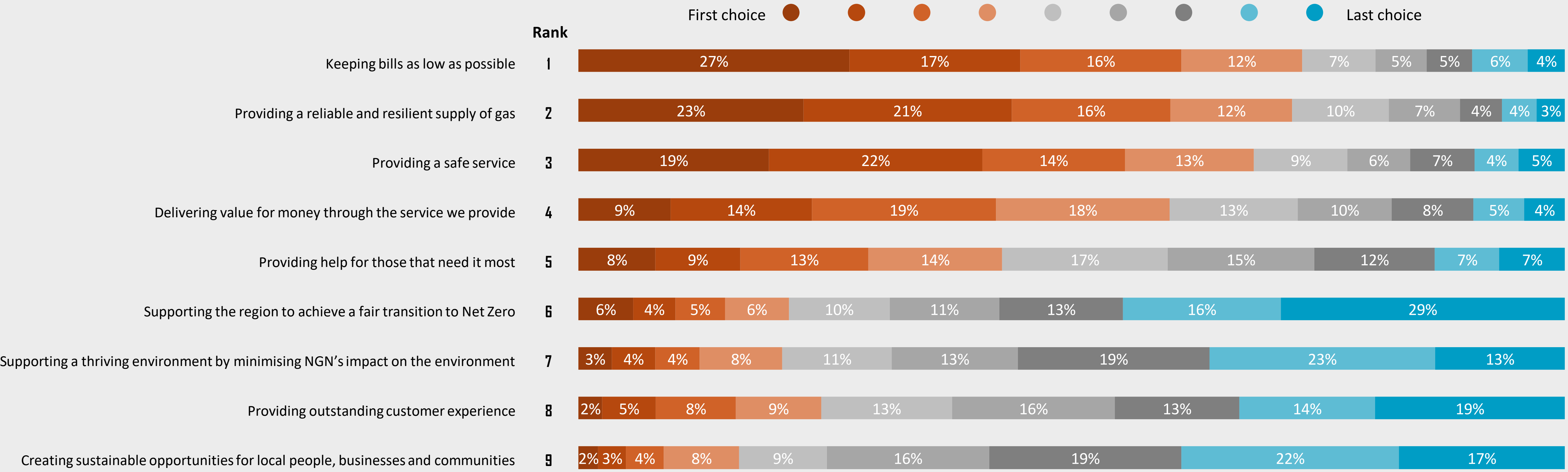
Customers informed priorities - domestic

3

TRACKING QUESTION(S)

Informed priorities for domestic customers are the same as the overall sample.

Wave 6 – Domestic



Q42. 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. Weighted base: Domestic: 1102

Customer priorities

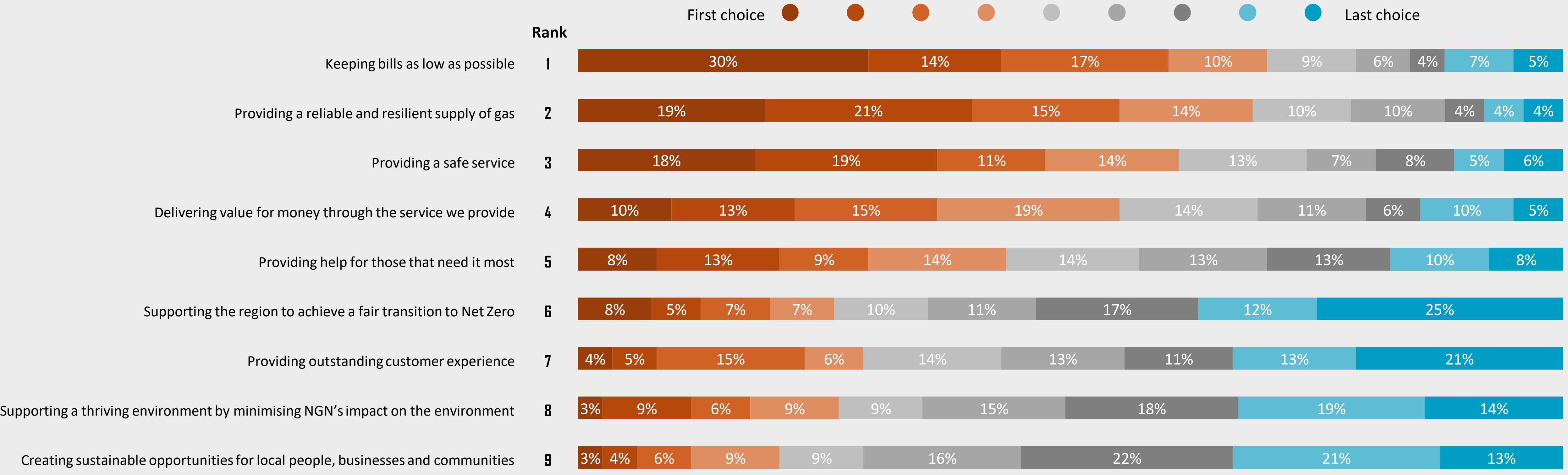
Customers informed priorities - business

3

TRACKING QUESTION(S)

Similarly, business customers have very similar priorities once informed.

Wave 6 – Business



Q42. 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. Weighted base; Wave 6: Business: 200

Customer priorities

3

Customers informed priorities - by subgroup

TRACKING QUESTION(S)

Once informed, reliability is more of a priority for those aged 50+, and safety for those of a higher SEG. Keeping bills low and value for money continue to be more important for digitally disengaged and those struggling with their bills. Customers aged 18-29 place more importance on lower priority areas.

Age – Jan/Feb 26 Domestic

	Age			
	18-29	30-49	50-69	70+
Keeping bills as low as possible	26%	28%	26%	30%
Providing a reliable and resilient supply of gas	14% ↓	21%	26% ↑	28% ↑
Providing a safe service	14% ↓	15% ↓	25% ↑	21%
Delivering value for money through the service we provide	7% ↓	10%	11%	7% ↓
Providing help for those that need it most	14% ↑	9%	5% ↓	6% ↓
Supporting the region to achieve a fair transition to net zero	10% ↑	8% ↑	3% ↓	3% ↓
Supporting a thriving environment by minimising NGN's impact on the environment	7% ↑	4%	1%	3%
Providing outstanding customer experience	5% ↑	3%	2%	0% ↓
Creating sustainable opportunities for local people, businesses and communities	3% ↑	3%	1%	2%

SEG – Jan/Feb 26 Domestic

	SEG			
	AB	C1	C2	DE
Keeping bills as low as possible	23%	26%	28%	32%
Providing a reliable and resilient supply of gas	22%	25%	27%	18% ↓
Providing a safe service	27% ↑	19%	14% ↓	19%
Delivering value for money through the service we provide	7% ↓	8%	8%	13% ↑
Providing help for those that need it most	5% ↓	8%	11% ↑	7%
Supporting the region to achieve a fair transition to net zero	5%	7%	6%	3%
Supporting a thriving environment by minimising NGN's impact on the environment	5%	4%	3%	2%
Providing outstanding customer experience	3%	1%	2%	4%
Creating sustainable opportunities for local people, businesses and communities	4%	1%	2%	2%

PSR Eligible – Jan/Feb 26 Domestic

	PSR Eligible	
	Yes	No
Keeping bills as low as possible	28%	27%
Providing a reliable and resilient supply of gas	22%	24%
Providing a safe service	19%	20%
Delivering value for money through the service we provide	9%	10%
Providing help for those that need it most	9%	6%
Supporting the region to achieve a fair transition to net zero	6%	5%
Supporting a thriving environment by minimising NGN's impact on the environment	3%	4%
Providing outstanding customer experience	3%	2%
Creating sustainable opportunities for local people, businesses and communities	2%	2%

Digital status – Jan/Feb 26 Domestic

	Digital status		Bills	
	Digitally disengaged	Online	Pay without difficulty	Constant struggle / fall behind
Keeping bills as low as possible	40% ↑	26%	24%	32%
Providing a reliable and resilient supply of gas	8% ↓	24%	28% ↑	17% ↓
Providing a safe service	21%	19%	21%	17%
Delivering value for money through the service we provide	11% ↑	9%	8%	11% ↑
Providing help for those that need it most	9%	8%	5% ↓	11% ↑
Supporting the region to achieve a fair transition to net zero	1% ↓	6%	5%	5%
Supporting a thriving environment by minimising NGN's impact on the environment	5%	3%	3%	3%
Providing outstanding customer experience	3%	2%	2%	2%
Creating sustainable opportunities for local people, businesses and communities	2%	2%	3%	1%

Q42. 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 1-9 (where 1 is the most important) Wave 6: Domestic: 1102

↑↓ Significantly higher/lower than total

Customer priorities

Customers informed priorities - by subgroup

3

TRACKING QUESTION(S)

Once informed, keeping bills as low as possible remains higher priority for smaller businesses and those who struggle with their bills. Safety is more important to those who pay without difficulty and businesses with 1-49 employees.

Size of business – Jan/Feb 26 Business

	Size of Business		
	1 – 49 employees	50 – 99 employees	100+ employees
Keeping bills as low as possible	42% ↑	46% ↑	23% ↓
Providing a reliable and resilient supply of gas	15% ↓	23% ↑	19%
Providing a safe service	24% ↑	0% ↓	20%
Delivering value for money	3% ↓	4% ↓	12% ↑
Providing help for those that need it most	6% ↓	12% ↑	8%
Supporting the region to achieve a fair transition to Net Zero	3% ↓	12% ↑	8%
Providing outstanding customer experience	3%	4%	4%
Supporting a thriving environment	3%	0%	3%
Creating sustainable opportunities	0%	0%	4%

Ability to pay for bills – Jan/Feb 26 Business

	Bills	
	Pay without difficulty	Constant struggle / fall behind
Keeping bills as low as possible	23% ↓	41% ↑
Providing a reliable and resilient supply of gas	19%	16%
Providing a safe service	24% ↑	9% ↓
Delivering value for money	8%	11%
Providing help for those that need it most	8%	8%
Supporting the region to achieve a fair transition to Net Zero	9% ↑	4% ↓
Providing outstanding customer experience	3%	4%
Supporting a thriving environment	3%	3%
Creating sustainable opportunities	2%	4%

Q42. 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 1-9 (where 1 is the most important)
Weighted based; Wave 6: Business: 200, 1-49 employees: 33, 50-99 employees: 26, 100+ employees: 141; Pay without difficulty: 119, Constant struggle / fall behind: 75

↑↓ Significantly higher/lower than total

Customer priorities

3

Customers informed priorities – domestic vs future

TRACKING QUESTION(S)

Total

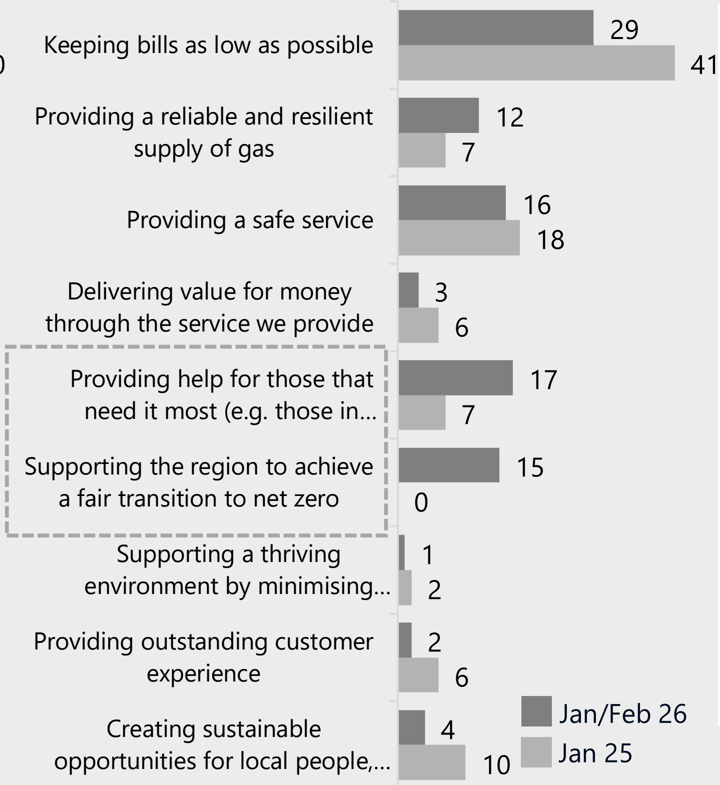
Future cust

YIC

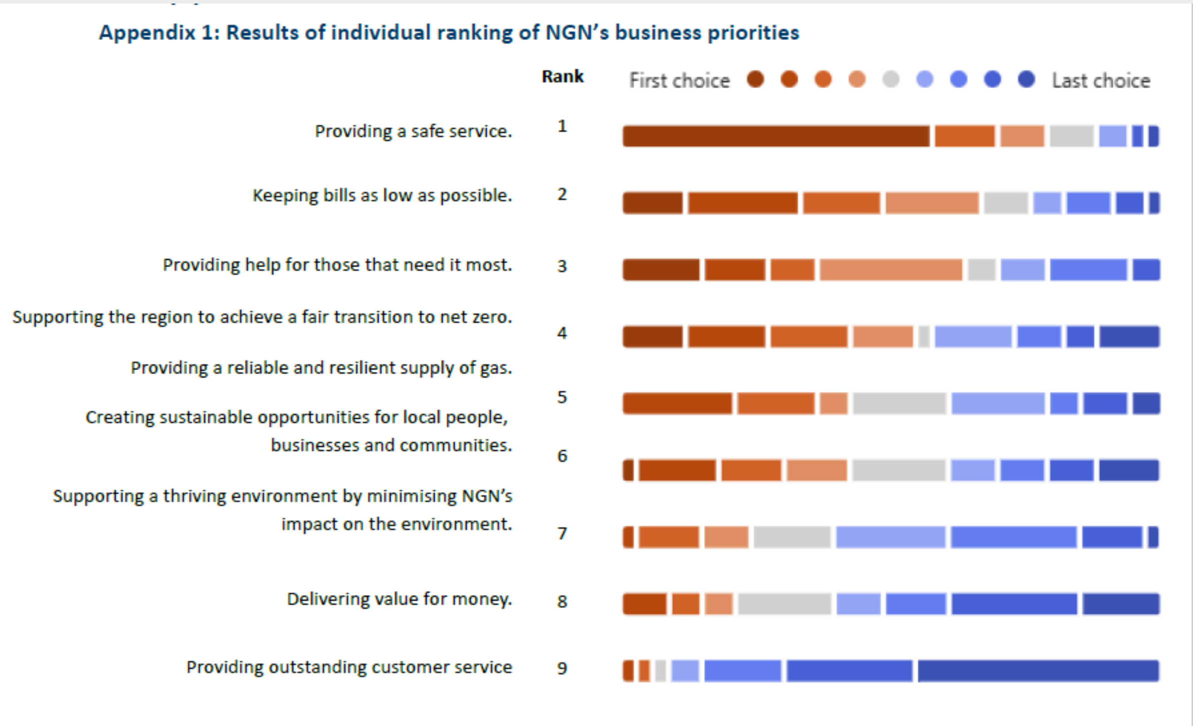
While domestic and future customers have similar priorities, future customers in 2026 placed higher emphasis on providing help for those who need it most and supporting the region to achieve net zero. This aligns with feedback from the YIC in 2026, who ranked these in 3rd and 4th place, above reliability

Domestic

Future customers



YIC



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

Q42. 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 5: Domestic: 1223, Business: 200, wave 6: Domestic: 1102, Future: 58 (caution: low base size)

Customer priorities

How will priorities change in the next five years?

3

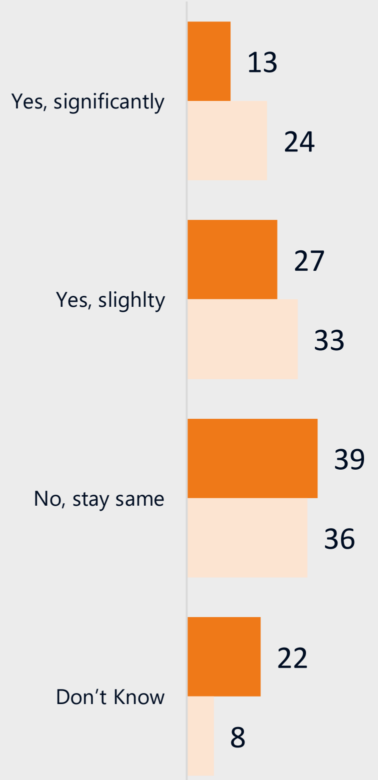
QUESTION ADDED IN WAVE 5

Domestic

Business

40% of domestic customers (and 57% of business) think their priorities for NGN will change in the next five years. The main reasons for this are rising energy costs, changes in personal circumstances, government policy, technological change in energy systems and environmental awareness.

% seeing change



Reasons for change

Cost of living / energy affordability
- "Keeping low energy bills is crucial in cost-of-living crisis."
- "As bills get more expensive, I will be looking for more ways to lower my expenses."
- "Energy prices are going through the roof."
- "I think the price of gas will be higher so the most important thing is going to be able to manage my bills."

Personal life changes
- "I will be home more when I retire."
- "I have a growing family and job insecurity"
- "I might have to move"
- "Because I will be that much older and vulnerable."
- "I will start working and then I will no longer be a student."

Government policy / political influence
- "The government will force us to"
- "Things change with government policies."
- "Government will shift goalposts"
- "Due to pressure from the government."

Technology and infrastructure evolution
- "Evolving technology means things will change"
- "More carbon neutral technologies will emerge"
- "Different fuel sources will change the game"
- "We will need to focus less on gas supply and focus on new technologies"

Environmental awareness and net zero
- "We may start to become more concerned about meeting the carbon zero target"
- "I will be more aware of environmental changes & issues."
- "We must, or our children's future will be bleak."
- "I think net zero will become more important"

Q48. Looking ahead to the next 5 years, do you think your priorities for NGN are likely to change?
Q49. Please briefly explain why you think your priorities will change in the next 5 years. Weighted base; wave 6: 1302, Domestic: 1102, Business: 200

Sustainability commitments 4

1 Customers prioritise affordable, decarbonised energy above all other sustainability commitments, with access to information/funding for vulnerable communities next. Priorities are very similar for domestic and business customers overall.

2 Future customers also rate affordable decarbonised energy solutions as most important, and access to info/funding in second place. Eliminating air pollutant emissions is more important for future customers.

3 The two priority commitments were chosen mainly due to their focus on cost, which is crucial for many. A focus on the environment and vulnerable people are secondary.

4 Looking at environmental attitudes, 82% say they regularly do things to reduce their environmental impact, such as recycling or saving energy. 51% of business customers are willing to pay more for environmentally friendly products/services (vs only 32% of domestic customers).

5 Four environmental segments appear: conflicted realists, eco advocates, environment sceptics, and environmentally indifferent, each differing in engagement levels, willingness to pay and views on regulation.

Sustainability commitments

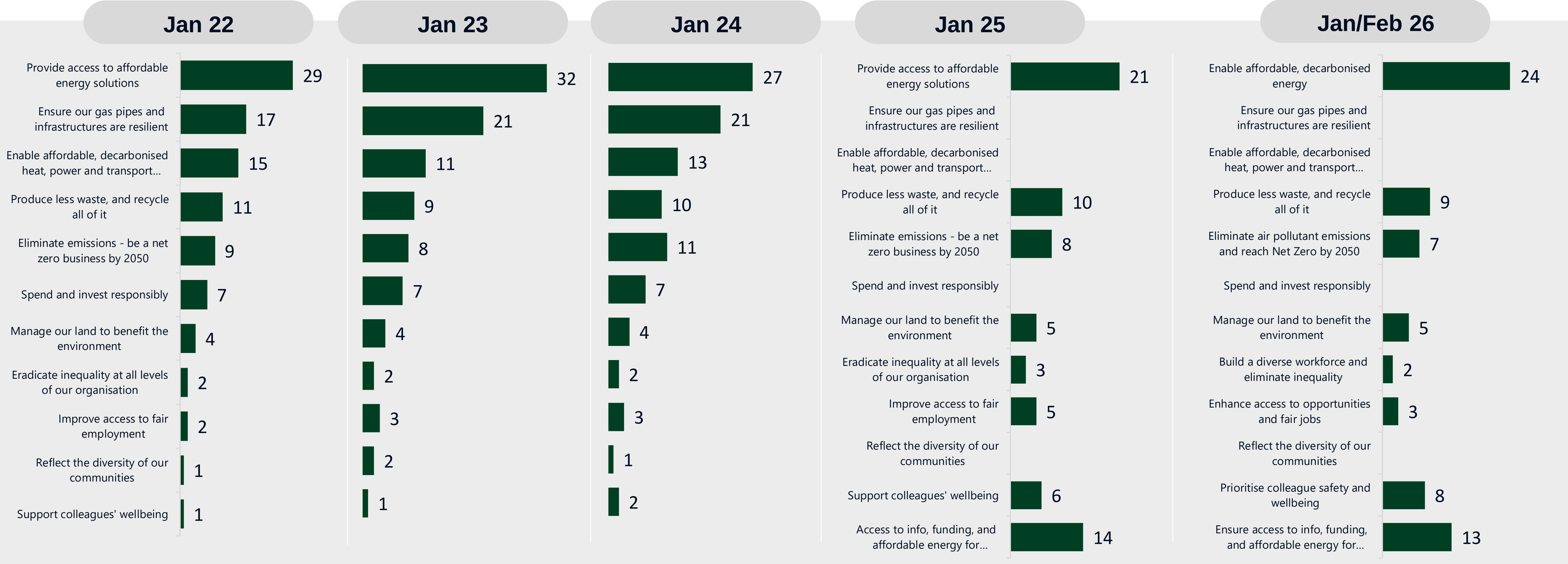
4

Priority NGN sustainability commitments - overall

Data for Jan 25 and Jan/Feb 26 has been weighted to the number of statements in previous waves to provide a comparison; and wording of some statements have been amended in 2026.

TRACKING QUESTION(S)

Affordable decarbonised energy solutions is the top sustainability priority for NGN by far. Providing access to information/funding and affordable energy for customers/vulnerable communities is second (higher among domestic customers). Otherwise, priorities for domestic and business are similar.

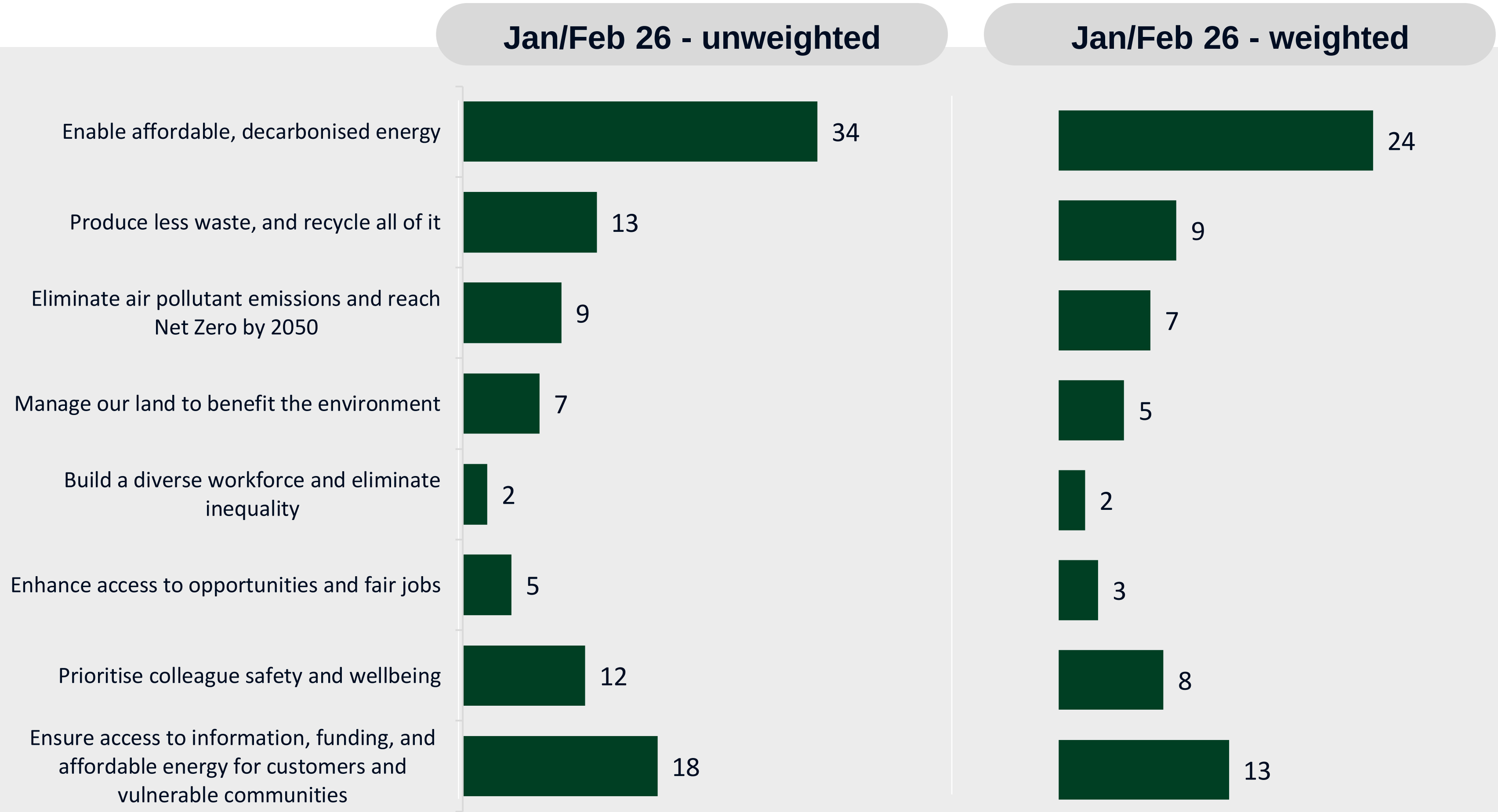


Q18. Please look at the list of commitments and choose the 3 commitments you would most like NGN to prioritise: First commitment) (wave 2 = 1,124; Domestic 952, Business: 172, wave 3= 1,355, Domestic 1,100, Business 255, wave 4: 1,403, Domestic: 1,167, Business: 236, Weighted base; wave 5: 1423, Domestic: 1223, Business: 200, Weighted base; wave 6: 1302, Domestic: 1102, Business: 200) **New question in wave 2**

Sustainability commitments 4

Priority NGN sustainability commitments - overall

Data for Jan/Feb 26 has been weighted to the number of statements in previous waves to provide a comparison.



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: 1423, Domestic: 1223, Business: 200, Weighted base; Wave 6; 1302, Domestic: 1102, Business: 200) New question in wave 2

Sustainability commitments

Priority NGN sustainability commitments – by business / domestic

4

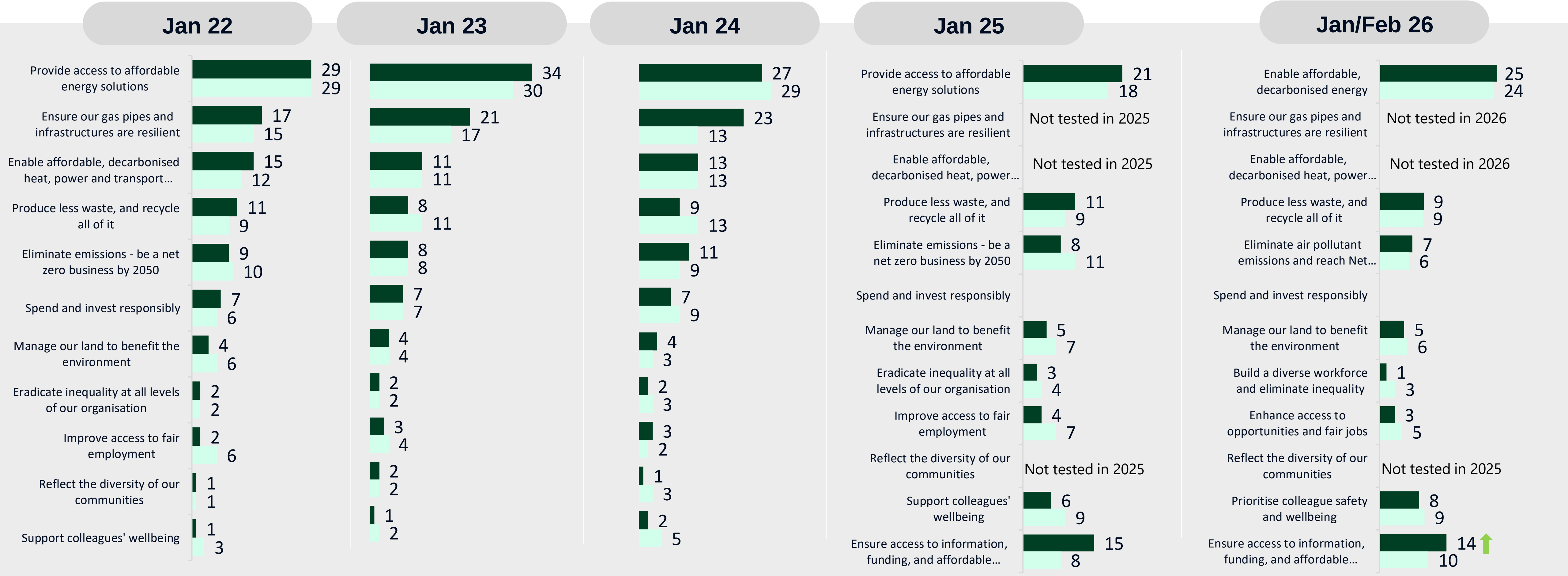
Data for Jan 25 and Jan/Feb 26 has been weighted to the number of statements in previous waves to provide a comparison; and wording of some statements have been amended in 2026.

TRACKING QUESTION(S)

Domestic

Business

Priorities are very similar for domestic and business customers overall (ensuring access to information/funding and affordable energy for customers/vulnerable communities is higher for domestic customers).



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, Weighted base; wave 6: 1302, Domestic: 1102, Business: 200) **New question in wave 2**

Significantly higher/lower than total

Sustainability commitments 4

Priority NGN sustainability commitments – by domestic / future

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

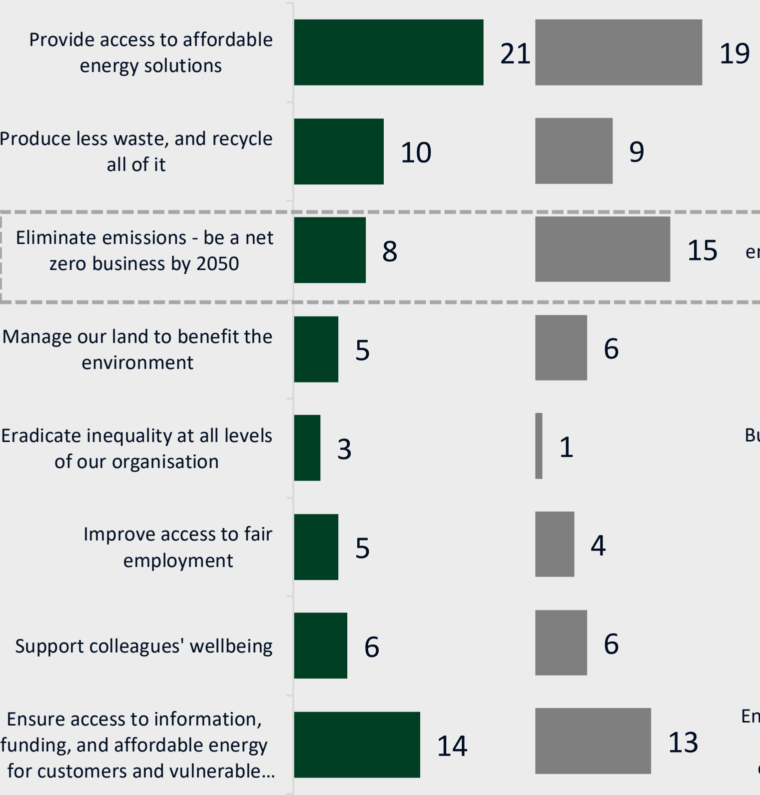
TRACKING QUESTION(S)

Domestic

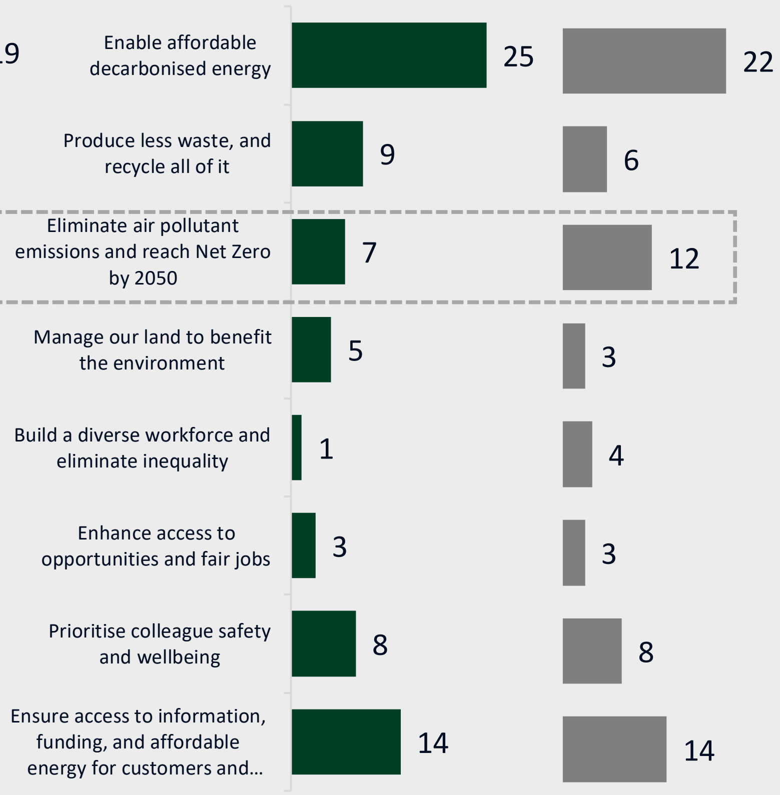
Future cust

Future customers also rate affordable decarbonised energy solutions as most important, and access to info/funding in second place. Eliminating air pollutant emissions continues to be more important for future customers in third place. This is 4th place for YIC members, after producing less waste and recycling it.

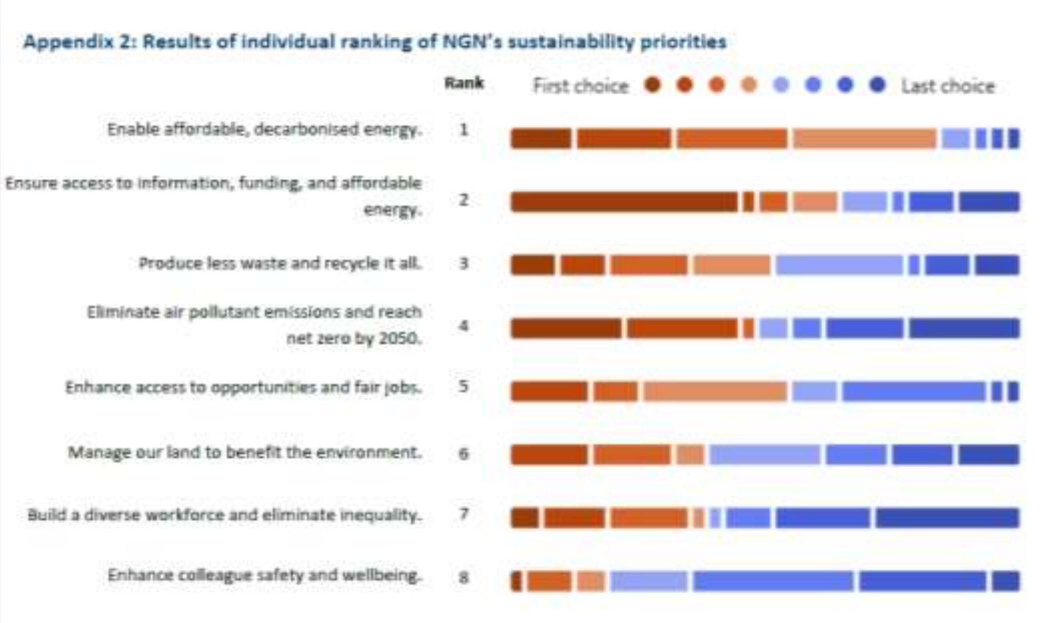
Jan 25



Jan/Feb 26



YIC



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, Weighted base; wave 6: 1302, Domestic: 1102, Future customers: 58. Caution: low base)

Sustainability commitments 4

Priority NGN sustainability commitments – by subgroup

TRACKING QUESTION(S)

Reaching net zero by 2025 is more important to younger customers. Digitally disengaged customers place a lower priority on ensuring access to affordable, decarbonised energy, and see producing less waste and recycling as more important.

Age – Jan/Feb 26 Domestic

	Age			
	18-29	30-49	50-69	70+
Enable affordable, decarbonised energy	23%	28%	23%	23%
Ensure access to information, funding, and affordable energy for customers and vulnerable communities	14%	12%	13%	18% ↑
Produce less waste, and recycle all of it	6% ↓	8%	11% ↑	11% ↑
Prioritise colleague safety and wellbeing	7%	6% ↓	12% ↑	6% ↓
Eliminate air pollutant emissions and reach Net Zero by 2050	11% ↑	9% ↑	4% ↓	4% ↓
Manage our land to benefit the environment	4%	4%	7%	5%
Enhance access to opportunities and fair jobs	6%	3%	2%	2%
Build a diverse workforce and eliminate inequality	3%	2%	0%	2%

PSR Eligible – Jan/Feb 26 Domestic

	PSR Eligible	
	No	Yes
Enable affordable, decarbonised energy	26%	22%
Ensure access to information, funding, and affordable energy for customers and vulnerable communities	11% ↓	16%
Produce less waste, and recycle all of it	9%	10%
Prioritise colleague safety and wellbeing	9%	8%
Eliminate air pollutant emissions and reach Net Zero by 2050	7%	6%
Manage our land to benefit the environment	5%	5%
Enhance access to opportunities and fair jobs	4%	3%
Build a diverse workforce and eliminate inequality	2%	1%

SEG – Jan/Feb 26 Domestic

	SEG			
	AB	C1	C2	DE
Enable affordable, decarbonised energy	26%	28%	20%	23%
Ensure access to information, funding, and affordable energy for customers and vulnerable communities	12%	14%	16%	14%
Produce less waste, and recycle all of it	9%	10%	9%	9%
Prioritise colleague safety and wellbeing	8%	7%	6% ↓	11% ↑
Eliminate air pollutant emissions and reach Net Zero by 2050	8%	6%	8%	7%
Manage our land to benefit the environment	6%	4%	6%	5%
Enhance access to opportunities and fair jobs	3%	2%	5%	3%
Build a diverse workforce and eliminate inequality	1%	2%	1%	1%

Digital status – Jan/Feb 26 Domestic

	Digital status		Bills	
	Digitally disengaged	Online	Pay without difficulty	Constant struggle / fall behind
Enable affordable, decarbonised energy	12% ↓	26% ↑	23%	26%
Ensure access to information, funding, and affordable energy for customers and vulnerable communities	15%	14%	12%	16%
Produce less waste, and recycle all of it	17% ↑	8%	11% ↑	8%
Prioritise colleague safety and wellbeing	11% ↑	8%	10% ↑	7%
Eliminate air pollutant emissions and reach Net Zero by 2050	9%	7%	7%	5%
Manage our land to benefit the environment	3%	5%	5%	6%
Enhance access to opportunities and fair jobs	4%	3%	3%	4%
Build a diverse workforce and eliminate inequality	1%	1%	2%	1%

↑↓ Significantly higher/lower than total

Q18. Please look at the list of commitments and choose the 3 commitments you would most like NGN to prioritise. Weighted base; wave 6: Domestic: 1102

Sustainability commitments

Priority NGN sustainability commitments – by subgroup

4

TRACKING QUESTION(S)

Size of business – Jan/Feb 26 Business

	Size of Business		
	1 – 49 employees	50 – 99 employees	100+ employees
Enable affordable, decarbonised energy	26%	34% ↑	22%
Ensure access to information, funding, and affordable energy for customers and vulnerable communities	7% ↓	6% ↓	12% ↑
Produce less waste, and recycle all of it	4% ↓	11% ↑	10%
Prioritise colleague safety and wellbeing	20% ↑	6% ↓	8%
Eliminate air pollutant emissions and reach Net Zero by 2050	9% ↑	8% ↑	5%
Manage our land to benefit the environment	4% ↓	3% ↓	7%
Enhance access to opportunities and fair jobs	0%	6%	6%
Build a diverse workforce and eliminate inequality	2%	0%	4%

Ability to pay for bills – Jan/Feb 26 Business

	Bills	
	Pay without difficulty	Constant struggle / fall behind
Enable affordable, decarbonised energy	23%	26%
Ensure access to information, funding, and affordable energy for customers and vulnerable communities	9%	12% ↑
Produce less waste, and recycle all of it	11% ↑	7% ↓
Prioritise colleague safety and wellbeing	10%	9%
Eliminate air pollutant emissions and reach Net Zero by 2050	7%	5%
Manage our land to benefit the environment	4% ↓	7%
Enhance access to opportunities and fair jobs	5%	5%
Build a diverse workforce and eliminate inequality	4%	3%

Q18. Please look at the list of commitments and choose the 3 commitments you would most like NGN to prioritise.
Weighted based; Wave 6: Business: 200, 1-49 employees: 33, 50-99 employees: 26, 100+ employees: 141; Pay without difficulty: 119, Constant struggle / fall behind: 75

↑↓ Significantly higher/lower than total

Sustainability commitments 4

Reasons chosen number one commitment

NEW QUESTION

The two key priorities were chosen mainly due to their focus on cost, which is crucial for many.
A focus on the environment and vulnerable people are secondary.

Enable affordable, decarbonised energy

Cost effective

It must be affordable to be able to have the heating on

So we can afford to use it and keep warm

Good for the environment, and cheaper

To help the environment and keep gas affordable

Because it helps achieve net zero whilst also addressing the cost-of-living issue

It's better for the environment and better to save money

It's important to our planet to get away from fossil fuels. It's equally important that the price is kept to a minimum so that people can afford to heat their homes.

Its the most important for the sustainability and hopefully keep costs as low as possible

Ensure access to information, funding, and affordable energy for customers and vulnerable communities

Looking after vulnerable customers and keeping prices down

We all can not afford our bills need more funding for everyone

Vulnerable communities need a lot of help

There is a lot of vulnerable people around lots of pensioners

Because those least able to pay are being hit hardest by recent rises in energy costs

Energy prices are at its highest ever. More profits for the bosses and heat or eat for the vulnerable

Since the raising of the cap, energy bill have risen disproportionately. More people have fallen into energy poverty than ever before.

This would be most beneficial to customers specifically funding for projects and keeping bills low should be a priority

So no one has the struggle with energy bills

Because we should all have affordable energy

Q18b. Why have you chosen '[PIPE IN OPTION SELECTED AT Q18 IN FIRST PLACE]' as your number one commitment?
Wave 6; 1302, Domestic: 1102, Business: 200) New question in wave 6

Sustainability commitments 4

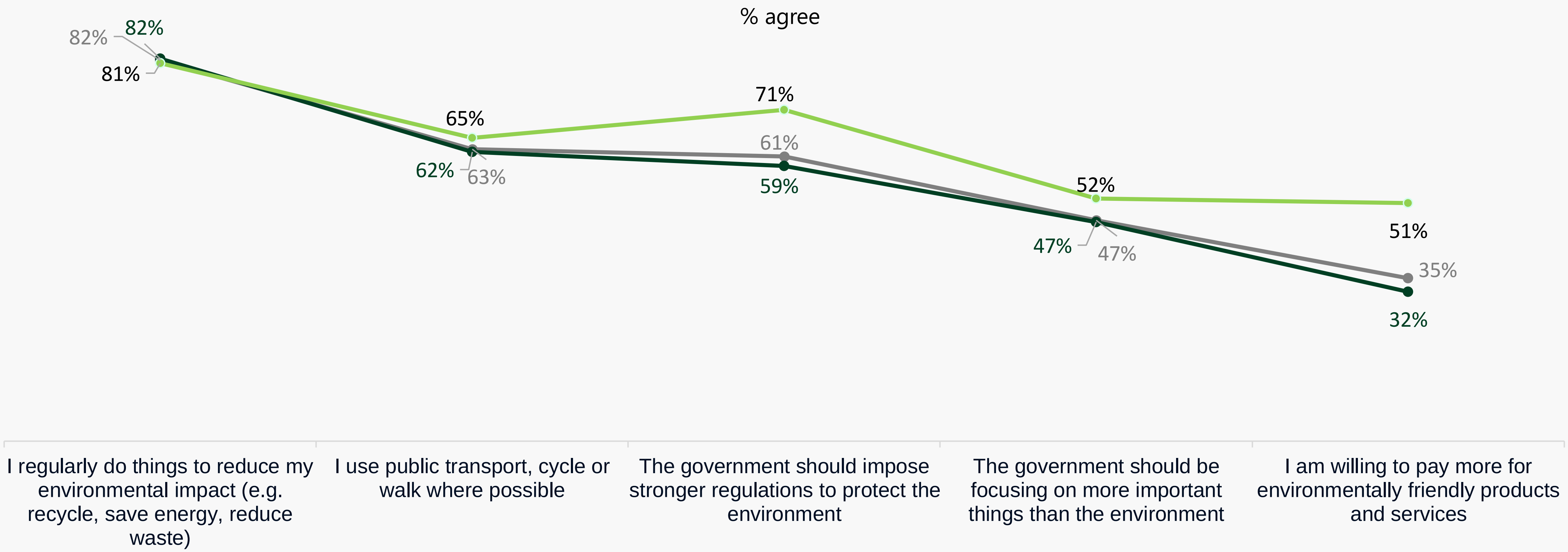
Attitudes to environmental issues

NEW QUESTION

Total
Domestic
Business

Most customers say they regularly do things to reduce their environmental impact, such as recycling or saving energy.
Business customers are more likely to feel that the government should be imposing stronger regulations to protect the environment, however half of them also feel the government should be focusing on more important things.
51% of business customers are willing to pay more for environmentally friendly products/services (32% for domestic customers).

Awareness of future technologies overall



C6b. Thinking of the following environmental issues, what are your thoughts on each?
Wave 6; 1302, Domestic: 1102, Business: 200) New question in wave 6

Significantly higher/lower than total

Sustainability commitments

Attitudes to environmental issues – by subgroup

4

TRACKING QUESTION(S)

Younger domestic customers and those of a higher socioeconomic group are more willing to pay more for environmentally friendly products and services. 18-29 year olds and digitally disengaged customers feel more strongly that the government should impose stronger regulations to protect the environment.

Age – Jan/Feb 26 Domestic

	Age			
	18-29	30-49	50-69	70+
I regularly do things to reduce my environmental impact (e.g. recycle, save energy, reduce waste)	73%	78%	85%	89%
I use public transport, cycle or walk where possible	71%	58%	61%	62%
The government should impose stronger regulations to protect the environment	76% ↑	65%	50%	52%
The government should be focusing on more important things than the environment	53%	43%	46%	47%
I am willing to pay more for environmentally friendly products and services	54% ↑	40% ↑	22% ↓	20% ↓

PSR Eligible – Jan/Feb 26 Domestic

	PSR Eligible	
	Yes	No
I regularly do things to reduce my environmental impact (e.g. recycle, save energy, reduce waste)	81%	82%
I use public transport, cycle or walk where possible	59%	67%
The government should impose stronger regulations to protect the environment	59%	60%
The government should be focusing on more important things than the environment	45%	48%
I am willing to pay more for environmentally friendly products and services	29%	36%

SEG – Jan/Feb 26 Domestic

	SEG			
	AB	C1	C2	DE
I regularly do things to reduce my environmental impact (e.g. recycle, save energy, reduce waste)	84%	86%	78%	79%
I use public transport, cycle or walk where possible	63%	60%	60%	67%
The government should impose stronger regulations to protect the environment	65%	57%	57%	59%
The government should be focusing on more important things than the environment	42%	42%	55%	48%
I am willing to pay more for environmentally friendly products and services	44% ↑	30%	29%	29%

Digital status – Jan/Feb 26 Domestic

	Digital status		Bills	
	Digitally disengaged	Online	Pay without difficulty	Constant struggle / fall behind
I regularly do things to reduce my environmental impact (e.g. recycle, save energy, reduce waste)	76%	82%	86%	78%
I use public transport, cycle or walk where possible	74%	61%	63%	61%
The government should impose stronger regulations to protect the environment	61%	59%	59%	59%
The government should be focusing on more important things than the environment	57% ↑	46%	45%	48%
I am willing to pay more for environmentally friendly products and services	31%	32%	34%	29%

C6b. Thinking of the following environmental issues, what are your thoughts on each?
Wave 6: Domestic: 1102

↑↓ Significantly higher/lower than total

Sustainability commitments

4

Attitudes to environmental issues – by subgroup

TRACKING QUESTION(S)

Businesses who pay without difficulty are more willing to pay more for environmentally friendly products / services.

Size of business – Jan/Feb 26 Business

	Size of Business		
	1 – 49 employees	50 – 99 employees	100+ employees
I regularly do things to reduce my environmental impact (e.g. recycle, save energy, reduce waste)	73%	85%	82%
The government should impose stronger regulations to protect the environment	70%	65%	72%
I use public transport, cycle or walk where possible	48% ↓	81% ↑	65%
The government should be focusing on more important things than the environment	58%	54%	50%
I am willing to pay more for environmentally friendly products and services	36% ↓	50%	54%

Ability to pay for bills – Jan/Feb 26 Business

	Bills	
	Pay without difficulty	Constant struggle / fall behind
I regularly do things to reduce my environmental impact (e.g. recycle, save energy, reduce waste)	84%	76%
The government should impose stronger regulations to protect the environment	74%	67%
I use public transport, cycle or walk where possible	62%	71%
The government should be focusing on more important things than the environment	47%	59%
I am willing to pay more for environmentally friendly products and services	63% ↑	32% ↓

C6b. Thinking of the following environmental issues, what are your thoughts on each?
Weighted based; Wave 6: Business: 200, 1-49 employees: 33, 50-99 employees: 26, 100+ employees: 141; Pay without difficulty: 119, Constant struggle / fall behind: 75

↑↓ Significantly higher/lower than total

Environmental segments

4

Summary

We have statistically created 4 segments differentiated by their attitudes to the environment.

Conflicted realists

The youngest segment, they are conflicted between whether to focus on the environment or 'more important things'.

Environmental business areas are more of a priority to them, they want to reach net zero by 2050 and they are a little more willing to pay more for environmentally friendly products.

However, none of these environmental initiatives are top of their list.

Eco advocates

This pro-environment segment spans a wide range of age groups but are more likely to be a higher socio-economic status.

They support stronger government regulation to protect the environment and are willing to pay more for environmentally friendly products in their daily lives.

Reaching net zero is important to them and they are the most interested in receiving info on it.

Environment sceptics

This older, more male segment feel the government should be focusing on more important things than the environment.

Whilst claiming to be more familiar with net zero than other segments, they have no interest in receiving information on it and are the least likely to prioritise any environment-related business areas.

Their core focus is affordability.

Environmentally Indifferent

This segment tends to sit on the fence when it comes to their views on the environment.

A little less likely to choose environmentally focussed business areas, they are less familiar with the concept of net zero, but equally less interested in receiving information about it.

The environment is not high on their agenda, but neither are they actively against environmental initiatives.

Conflicted realists

Environmental segments

The youngest segment, they are conflicted between whether to focus on the environment or 'more important things'. Environmental business areas are more of a priority to them, they want to reach Net Zero by 2050 and they are a little more willing to pay more for environmentally friendly products. However, none of these environmental initiatives are top of their list.

KEY DEMOGRAPHICS

GENDER

The picture can't be displayed.

44% MALE

54% FEMALE

The picture can't be displayed.

AGE

18-29	30-39	40-49	50-59	60-69	70+
31% ↑	18%	13%	13%	9% ↓	16%

SEG

SEG	
AB	20%
C1	29%
C2	23%
DE	27%

PRIORITIES

INFORMED PRIORITY BUSINESS AREAS

Providing reliable & resiliant gas supply	22%
Keeping bills low	20% ↓
Providing safe service	18%
Providing help for those that need it most	11% ↑
Supporting region to achieve Net Zero	8% ↑
Delivering value for money	6% ↓
Supporting a thriving environment	6% ↑
Providing outstanding customer experience	6% ↑
Creating sustainable opportunities	3% ↑

PRIORITY NGN SUSTAINABILITY COMMITMENTS

Enable affordable, decarbonised energy	20% ↓
Access to info, funding & affordable energy	12%
Produce less waste, and recycle all of it	10%
Eliminate emissions & reach Net Zero by 2050	10% ↑
Prioritise colleague safety and wellbeing	8%
Manage our land to benefit the environment	6% ↑
Enhance access to opportunities and fair jobs	6% ↑
Build a diverse workforce and eliminate inequality	1%

ENVIRONMENTAL AWARENESS & ATTITIDES

FAMILIARITY WITH NET ZERO

- 21% Very familiar
- 62% Somewhat familiar
- 17% Not familiar

INTEREST IN RECEIVING NET ZERO INFO

The picture can't be displayed.

- 25% Yes, definitely
- 54% ↑ Maybe, if easy to understand
- 21% ↓ No, not interested

ATTITUDES TO THE ENVIRONMENT (% AGREE)

The picture can't be displayed.

- 89% I regularly do things to reduce my enviro. impact (e.g. recycle, save energy, reduce waste)
- 62% I use public transport, cycle or walk where possible
- 59% ↑ The government should impose stronger regulations to protect the environment
- 47% ↑ Government should be focusing on more important things than the environment
- 32% ↑ Willing to pay more for enviro. friendly products and services

↑↓ Significantly higher/lower than total domestic

Eco advocates

Environmental segments

This pro-environment segment spans a wide range of age groups but are more likely a higher socio-economic status. They support stronger government regulation to protect the environment and are willing to pay more for environmentally friendly products in their daily lives. Reaching Net Zero is important to them and they are the most interested in receiving info on it.

KEY DEMOGRAPHICS

GENDER

41% MALE

59% FEMALE

AGE

18-29	30-39	40-49	50-59	60-69	70+
17%	17%	14%	15%	16%	22%

SEG

SEG	%
AB	26% ↑
C1	34%
C2	16%
DE	24%

PRIORITIES

INFORMED PRIORITY BUSINESS AREAS

Area	%
Providing safe service	24% ↑
Keeping bills low	23%
Providing reliable & resiliant gas supply	22%
Supporting region to achieve Net Zero	8% ↑
Delivering value for money	8%
Providing help for those that need it most	8%
Supporting a thriving environment	4% ↑
Creating sustainable opportunities	2%
Providing outstanding customer experience	1% ↓

PRIORITY NGN SUSTAINABILITY COMMITMENTS

Commitment	%
Enable affordable, decarbonised energy	24%
Eliminate emissions and reach Net Zero by 2050	13% ↑
Access to info, funding & affordable energy	13%
Produce less waste, and recycle all of it	9%
Manage our land to benefit the environment	7% ↑
Prioritise colleague safety and wellbeing	6% ↓
Build a diverse workforce and eliminate inequality	2% ↑
Enhance access to opportunities and fair jobs	1% ↓

ENVIRONMENTAL AWARENESS & ATTITIDES

FAMILIARITY WITH NET ZERO

- 26% Very familiar
- 64% Somewhat familiar
- 10% ↓ Not familiar

INTEREST IN RECEIVING NET ZERO INFO

- ↑ 36% Yes, definitely
- 53% Maybe, if easy to understand
- ↓ 12% No, not interested

ATTITUDES TO THE ENVIRONMENT (% AGREE)

- 94% I regularly do things to reduce my enviro. impact (e.g. recycle, save energy, reduce waste)
- 89% ↑ The government should impose stronger regulations to protect the environment
- 69% I use public transport, cycle or walk where possible
- 57% ↑ Willing to pay more for enviro. friendly products and services
- 0% Government should be focusing on more important things than the environment

↑↓ Significantly higher/lower than total domestic

Environment sceptics

Environmental segments

This older, more male segment feel the government should be focusing on more important things than the environment.
Whilst claiming to be more familiar with Net Zero than other segments, they have no interest in receiving information on it and are the least likely to prioritise any environment-related business areas. Their core focus is affordability.

KEY DEMOGRAPHICS

GENDER

MALE	FEMALE
59% ↑	41% ↓

AGE

18-29	30-39	40-49	50-59	60-69	70+
6% ↓	3% ↓	14%	20%	28% ↑	28% ↑

SEG

SEG	%
AB	14%
C1	29%
C2	29%
DE	28%

PRIORITIES

INFORMED PRIORITY BUSINESS AREAS

Area	%
Keeping bills low	37% ↑
Providing reliable & resiliant gas supply	22%
Providing safe service	17%
Delivering value for money	14% ↑
Providing help for those that need it most	6%
Creating sustainable opportunities	2% ↓
Providing outstanding customer experience	2% ↓
Supporting region to achieve Net Zero	0% ↓
Supporting a thriving environment	0% ↓

PRIORITY NGN SUSTAINABILITY COMMITMENTS

Enable affordable, decarbonised energy	26%
Access to info, funding & affordable energy	18% ↑
Prioritise colleague safety and wellbeing	11% ↑
Produce less waste, and recycle all of it	8%
Manage our land to benefit the environment	4% ↓
Enhance access to opportunities and fair jobs	3%
Build a diverse workforce and eliminate inequality	2% ↑
Eliminate air pollutant emissions and reach Net...	1% ↓

ENVIRONMENTAL AWARENESS & ATTITIDES

FAMILIARITY WITH NET ZERO

Very familiar	Somewhat familiar	Not familiar
33% ↑	52% ↓	15%

INTEREST IN RECEIVING NET ZERO INFO

Yes, definitely	Maybe, if easy to understand	No, not interested
5% ↓	28% ↑	67% ↑

ATTITUDES TO THE ENVIRONMENT (% AGREE)

Government should be focusing on more important things than the environment	97% ↑
I regularly do things to reduce my enviro. impact (e.g. recycle, save energy, reduce waste)	69%
I use public transport, cycle or walk where possible	48% ↓
The government should impose stronger regulations to protect the environment	4% ↓
Willing to pay more for enviro. friendly products and services	1% ↓

↑↓ Significantly higher/lower than total domestic

Environmentally Indifferent

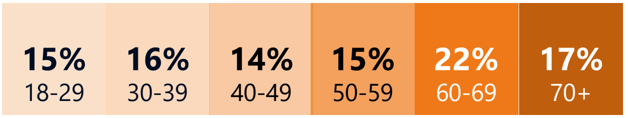
Environmental segments

This segment tends to sit on the fence when it comes to their views on the environment. A little less likely to choose environmentally focussed business areas, they are less familiar with the concept of Net Zero, but equally less interested in receiving information about it. The environment is not high on their agenda, but neither are they actively against environmental initiatives.

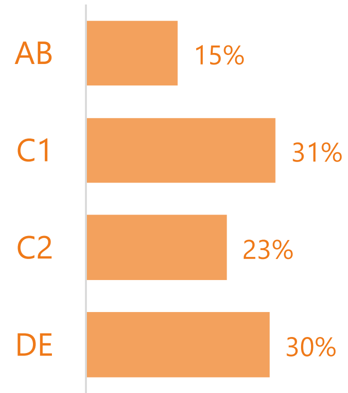
KEY DEMOGRAPHICS

GENDER

AGE

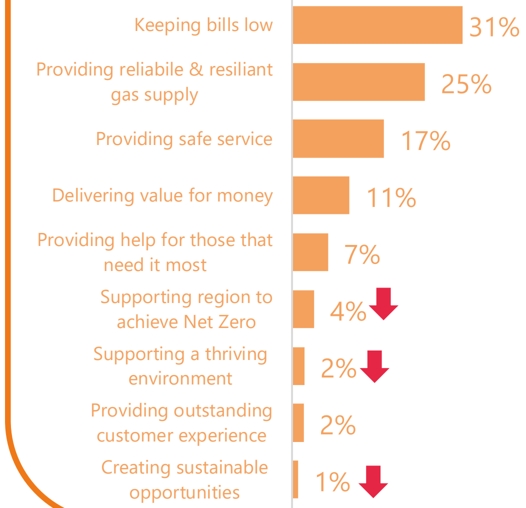


SEG



PRIORITIES

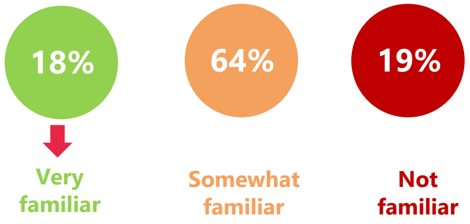
INFORMED PRIORITY BUSINESS AREAS



PRIORITY NGN SUSTAINABILITY COMMITMENTS

ENVIRONMENTAL AWARENESS & ATTITIDES

FAMILIARITY WITH NET ZERO



INTEREST IN RECEIVING NET ZERO INFO

14% Yes, definitely

53% Maybe, if easy to understand

33% No, not interested

ATTITUDES TO THE ENVIRONMENT (% AGREE)

73% I regularly do things to reduce my enviro. impact (e.g. recycle, save energy, reduce waste)

57% I use public transport, cycle or walk where possible

47% The government should impose stronger regulations to protect the environment

30% Government should be focusing on more important things than the environment

1% Willing to pay more for enviro. friendly products and services

Significantly higher/lower than total domestic

Future energy & heating systems 5

1 Although most customers claim awareness that heating systems will need to change, detailed understanding is limited, particularly among domestic customers, lower socio-economic groups, PSR-eligible customers and those struggling with bills. Businesses are more informed.

2 Around three quarters of customers would like to input into the decision about the type of heating systems available in their area. There is a preference for local decision making - two thirds feel this decision should be made at a local level, and around a third at a national level.

3 Awareness of future technologies is highest for heat pumps, followed by hydrogen fuelled cars and hydrogen in transport. Around half of customers feel positively about future technologies (heat pumps, district heat networks and hydrogen technologies)

4 Cost is the biggest obstacle to adopting new heating technologies. This is followed by lack of information and concerns about reliability and safety. These concerns are significantly higher among financially vulnerable groups.

5 Customers are generally accepting of the use of hydrogen and biomethane for industrial and commercial use, with only 5% finding this unacceptable. Promoting the positive environmental benefits and safety and reliability of hydrogen are likely to improve perceptions.

5 Customers expect NGN to lead on net zero education. Majority want NGN to provide practical information on reducing energy use, accessing grants and funding, understanding new technologies and making low-carbon changes. Most believe this information should be available to all adults.

Future energy & heating

Future of heating (spontaneous awareness)

5

TRACKING QUESTION(S)

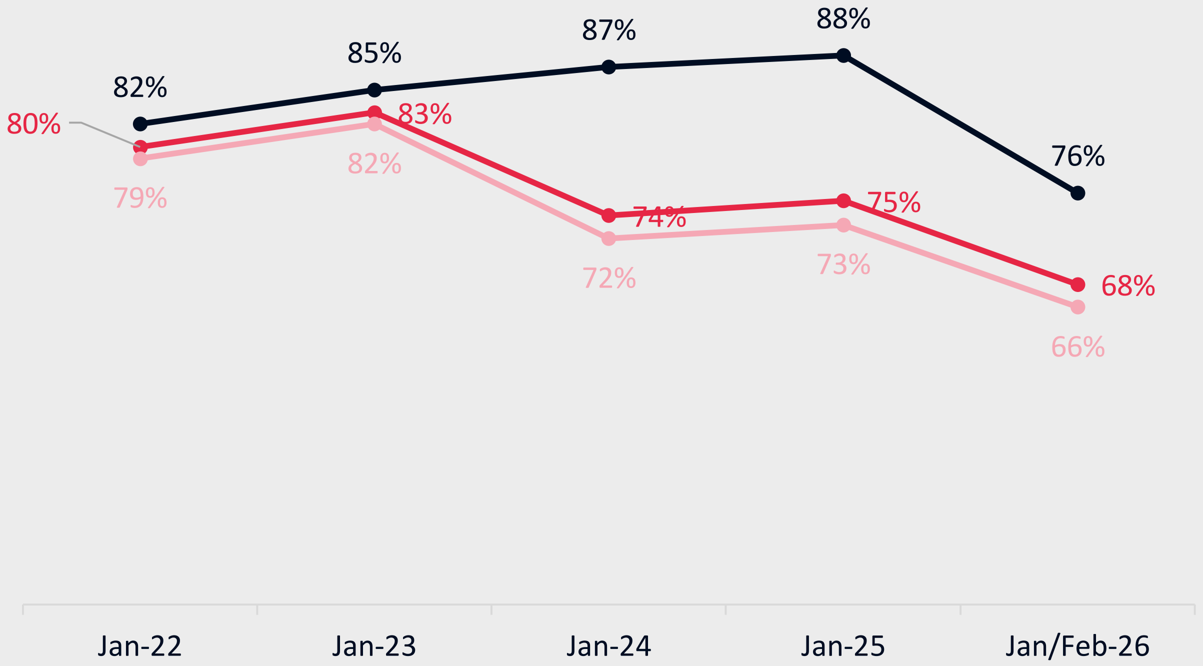
Total

Domestic

Business

Business customers are still more aware that **the way people in the UK heat their homes and business is likely to change in the next 10 years**, but this awareness has decreased since the previous waves with around two thirds of domestic customers aware compared to three quarters of business customers.

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



% agree

Department for Energy Security & Net Zero

Winter 2025 – 86% 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 37% saying they knew a lot or a fair amount (Public Attitudes Tracker).

Q20. How much do you agree or disagree with the following statement?? (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, Weighted base; wave 5: 1424, Domestic 1224, Business: 200, Weighted base; wave 6: 1302, Domestic 1102, Business: 200)

Future energy & heating

Question asked on future energy

5

Customers were then shown the below information on future changes and asked how well informed they feel they are.

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, under the Future Homes Standard, all new-build homes must use energy-efficient, low-carbon heating systems instead of gas boilers, reducing emissions by an estimated 75–80%.

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.

How well informed do you feel about what these changes will involve and how they will impact you?

Future energy & heating

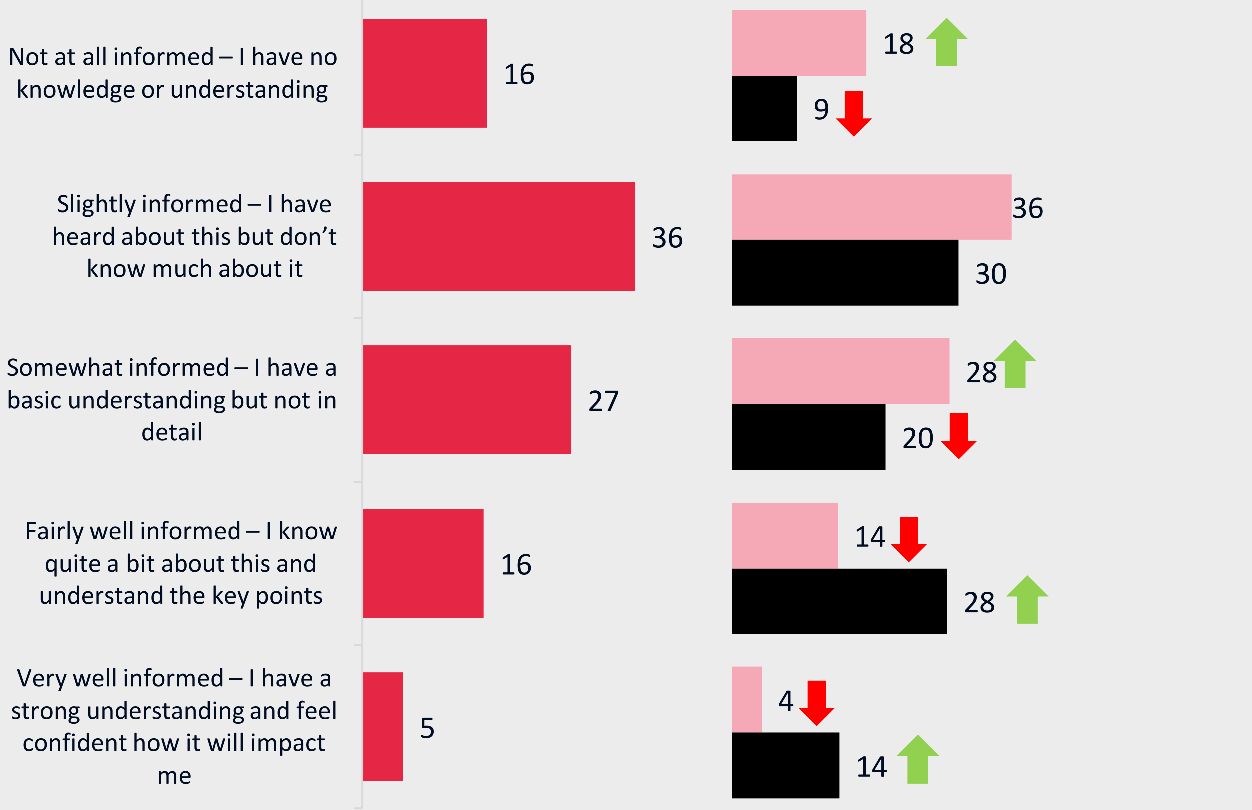
Future of heating (prompted)

5

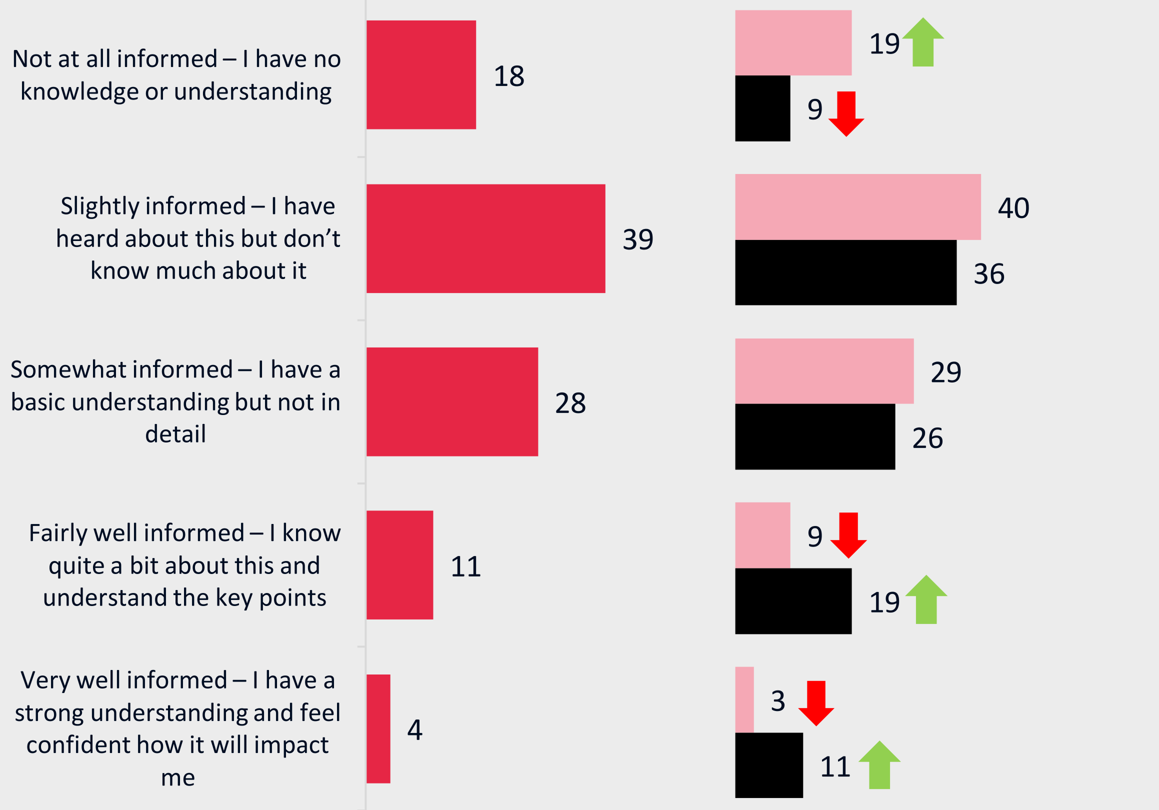
QUESTION ADDED IN WAVE 5

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. Least informed are those with a lower socio-economic status, those who struggle to pay their bills, and those who are PSR eligible. Businesses are more informed.

Jan 25: Use of low carbon heating systems



Jan/Feb 26: Use of low carbon heating systems



Q21. How well informed do you feel about what these changes will involve and how they will impact you? New question in wave 5
(Weighted base; wave 5: 1423; Domestic 1223, Business: 200, Weighted base; wave 6: 1302, Domestic 1102, Business: 200)

Significantly higher (business versus domestic)

Future energy & heating

Future of heating (prompted)

5

QUESTION ADDED IN WAVE 5

The picture can't be displayed.

Least informed of all are those with a lower socio-economic status who struggle to pay their bills, as well as women and those who are PSR eligible.

Age – Jan 25 Domestic

	Age				Gender	
	18-29	30-49	50-69	70+	Male	Female
Not at all informed No knowledge or understanding	17%	21%	19%	20%	14% ↓	24% ↑
Slightly informed Heard of but don't know much about it	43%	39%	42%	35%	38%	42%
Somewhat informed Basic understanding but not in detail	27%	25%	30%	33%	32%	26%
Fairly well informed Know quite a bit and understand the key points	9%	12%	8%	7%	12% ↑	7% ↓
Very well informed Strong understanding and know how it impacts me	4%	3%	1%	4%	5% ↑	2% ↓

PSR Eligible – Jan 25 Domestic

	PSR Eligible	
	No	Yes
Not at all informed No knowledge or understanding	14% ↓	24% ↑
Slightly informed Heard of but don't know much about it	42%	38%
Somewhat informed Basic understanding but not in detail	29%	28%
Fairly well informed Know quite a bit and understand the key points	11%	8%
Very well informed Strong understanding and know how it impacts me	4%	2%

SEG – Jan 25 Domestic

	SEG			
	AB	C1	C2	DE
Not at all informed No knowledge or understanding	14%	16%	14%	31% ↑
Slightly informed Heard of but don't know much about it	38%	40%	44%	38%
Somewhat informed Basic understanding but not in detail	30%	32%	28%	25%
Fairly well informed Know quite a bit and understand the key points	13%	9%	12%	5% ↓
Very well informed Strong understanding and know how it impacts me	4%	4%	2%	2%

Financially vulnerable– Jan 25 Domestic

	Bills	
	Pay without difficulty	Constant struggle / fall behind
Not at all informed No knowledge or understanding	13% ↓	26% ↑
Slightly informed Heard of but don't know much about it	40%	40%
Somewhat informed Basic understanding but not in detail	32%	26%
Fairly well informed Know quite a bit and understand the key points	12% ↑	5% ↓
Very well informed Strong understanding and know how it impacts me	3%	2%

Q21. How well informed do you feel about what these changes will involve and how they will impact you? New question in wave 5
Weighted base; wave 6: Domestic 1102

↑↓ Significantly higher/lower

Future energy & heating

Decision about having a gas supply

5

TRACKING QUESTION(S)

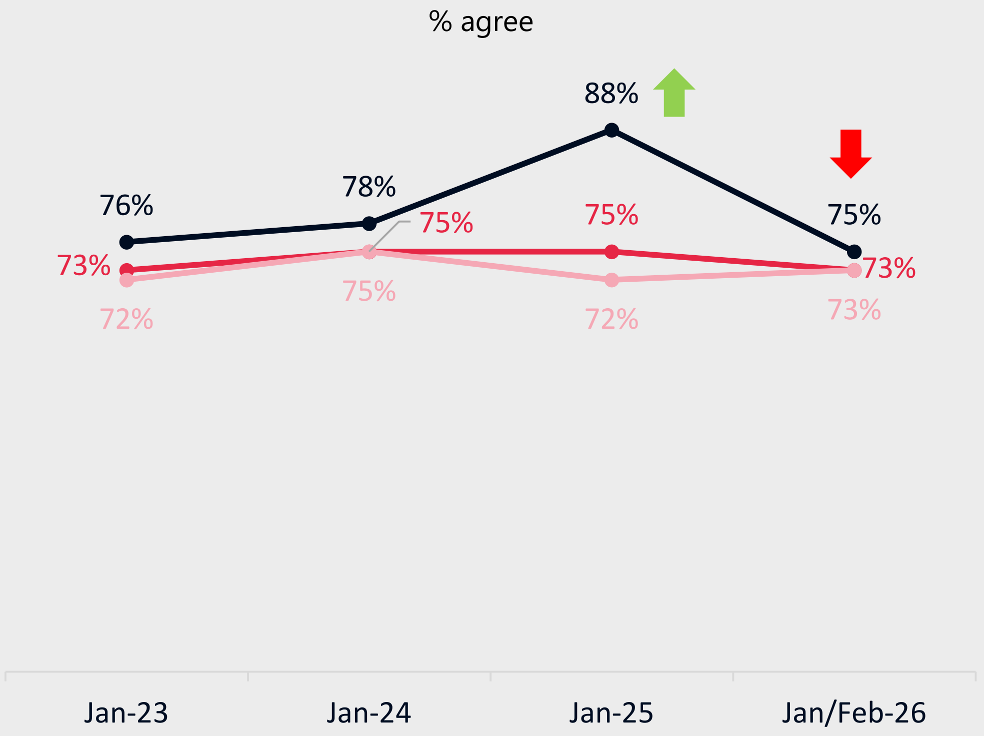
Total

Domestic

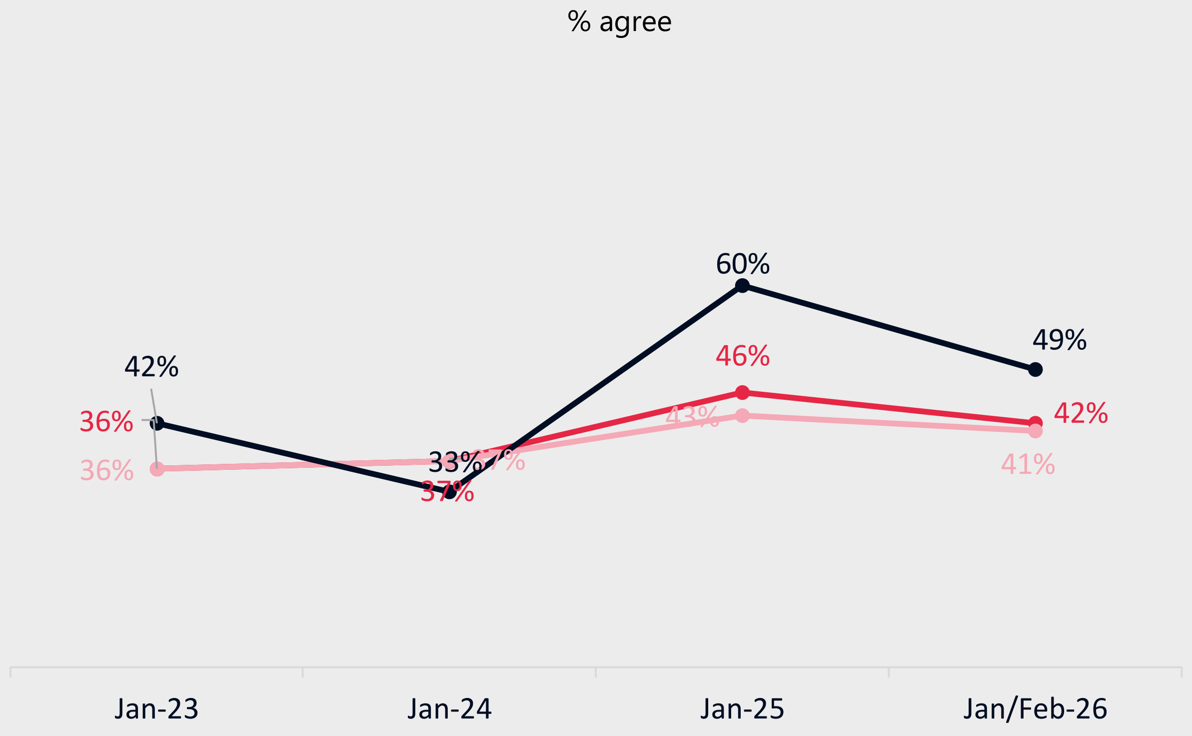
Business

Around three quarters of customers would like to input into the decision about the type of heating systems available in their area, with less than half of customers comfortable allowing others to make decisions about local heating systems.

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



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



Q25. How much do you agree or disagree with the following statements? wave 3= 1,355, Domestic 1,100, Business 255, wave 4: 692, Domestic:561, Business 131, wave 5: 1306, Domestic:1106, Business 200, wave 6: 1202, Domestic 1002, Business: 200) New question in wave 3

Significantly higher/lower

Future energy & heating

Decision about having a gas supply

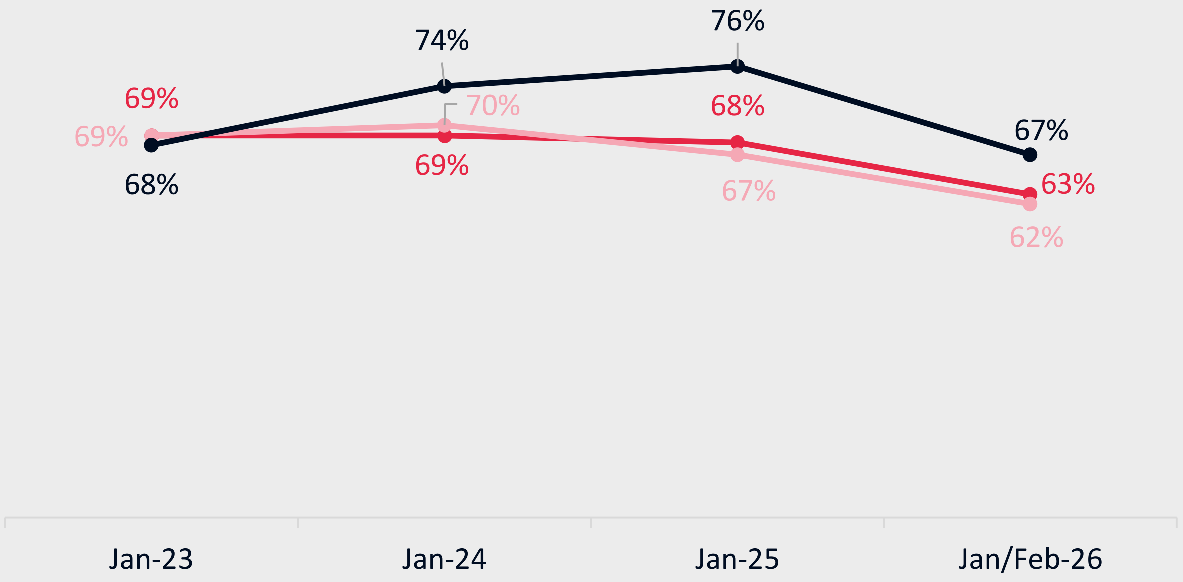
5

TRACKING QUESTION(S)

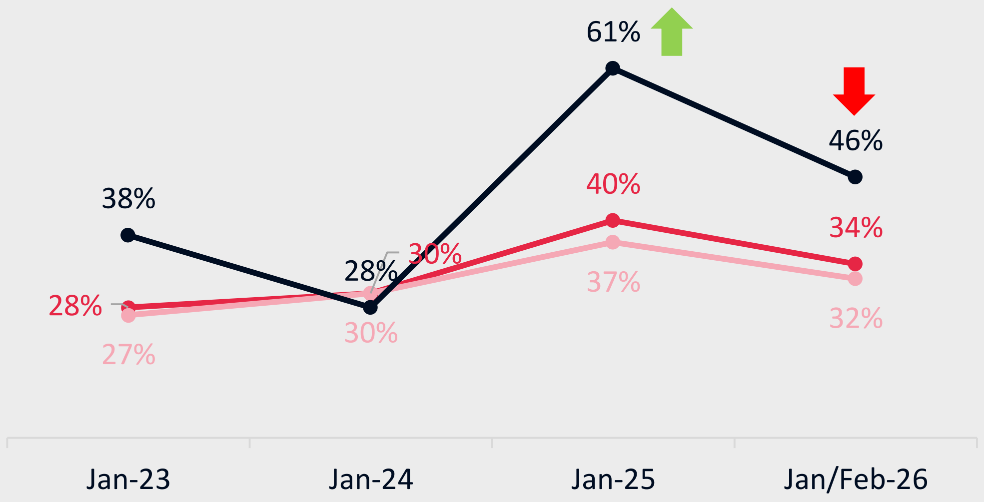
Total
Domestic
Business

Two thirds feel this decision should be made at a local level, and around a third at a national 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



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



Q25. How much do you agree or disagree with the following statements? wave 3= 1,355, Domestic 1,100, Business 255, wave 4: 692, Domestic:561, Business 131, wave 5: 1306, Domestic:1106, Business 200, wave 6: 1202, Domestic 1002, Business: 200) New question in wave 3

Significantly higher/lower

Future energy & heating

Awareness and perception of future technology

5

Department for Energy Security & Net Zero

Winter 2025 – only 24% know a lot or a fair amount about air source heat pumps, 29% ground source heat pumps (Public Attitudes Tracker).

TRACKING QUESTION(S)

Heat pumps

Hydrogen fuelled cars

Hydrogen boiler

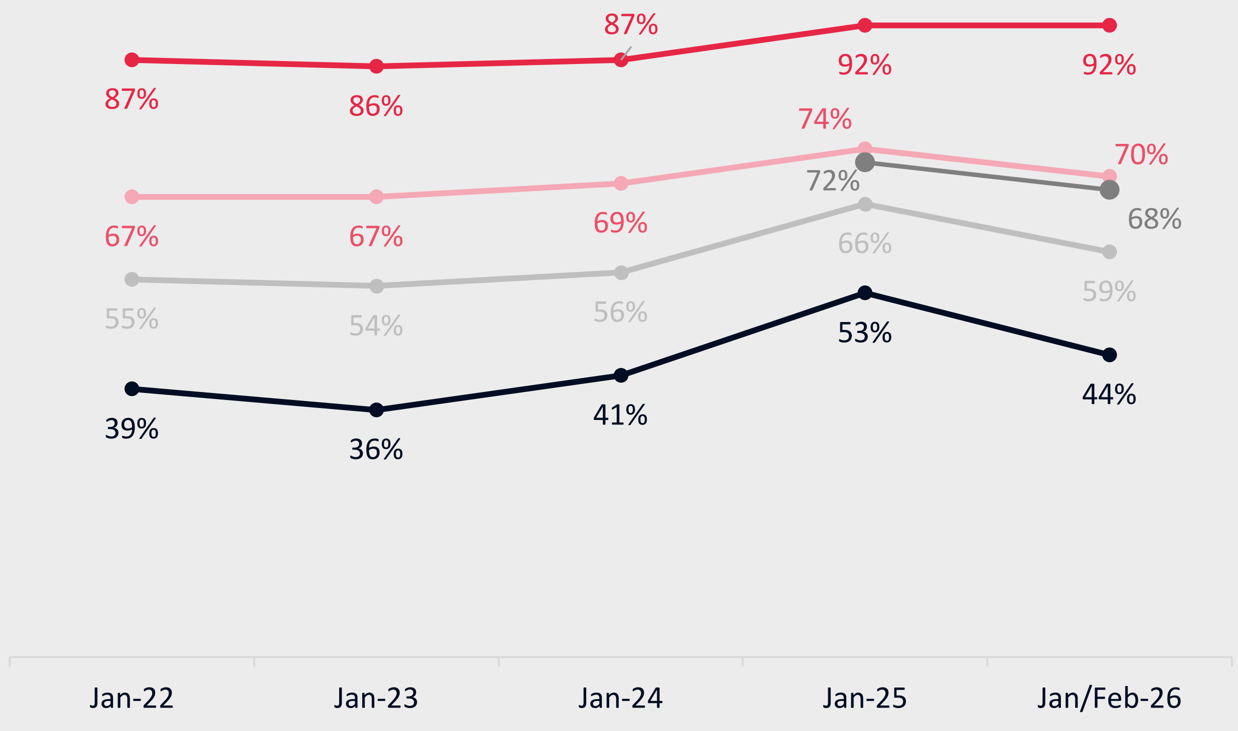
District heat networks

Hydrogen in transport

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

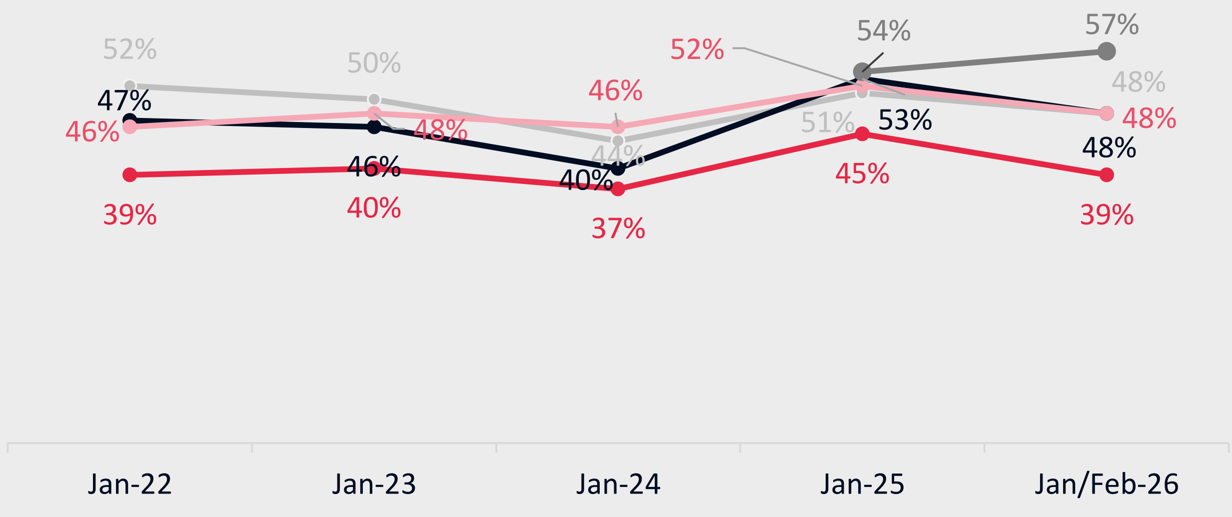
Awareness of future technologies overall

% aware



Perception of future technologies overall

% positive



Q27. Which of the following technologies have you heard of? (wave 2 = 1,124, wave 3: 1,355, wave 4: 711, wave 5: 1423, wave 6: 1302) New question in wave 2

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

Hydrogen fuelled cars

Hydrogen boiler

District heat networks

Hydrogen in transport

Heat pumps continue to present the largest perception gap by far. Despite high awareness, positivity is lacking.

Awareness and Perception of future technologies overall

	Awareness % aware	Perception % positive	Gap
Hydrogen boilers	59%	48%	11%
District heat networks	44%	48%	-4%
Heat pump	92%	39%	53%
Hydrogen cars	70%	48%	22%
Hydrogen in transport	68%	57%	11%

Q27. Which of the following technologies have you heard of? (wave 2 = 1,124, wave 3: 1,355, wave 4: 711, wave 5: 1423, wave 6: 1302) New question in wave 2

Q28. And what is your perception of the following technologies? (only those who were aware) New question in wave 2

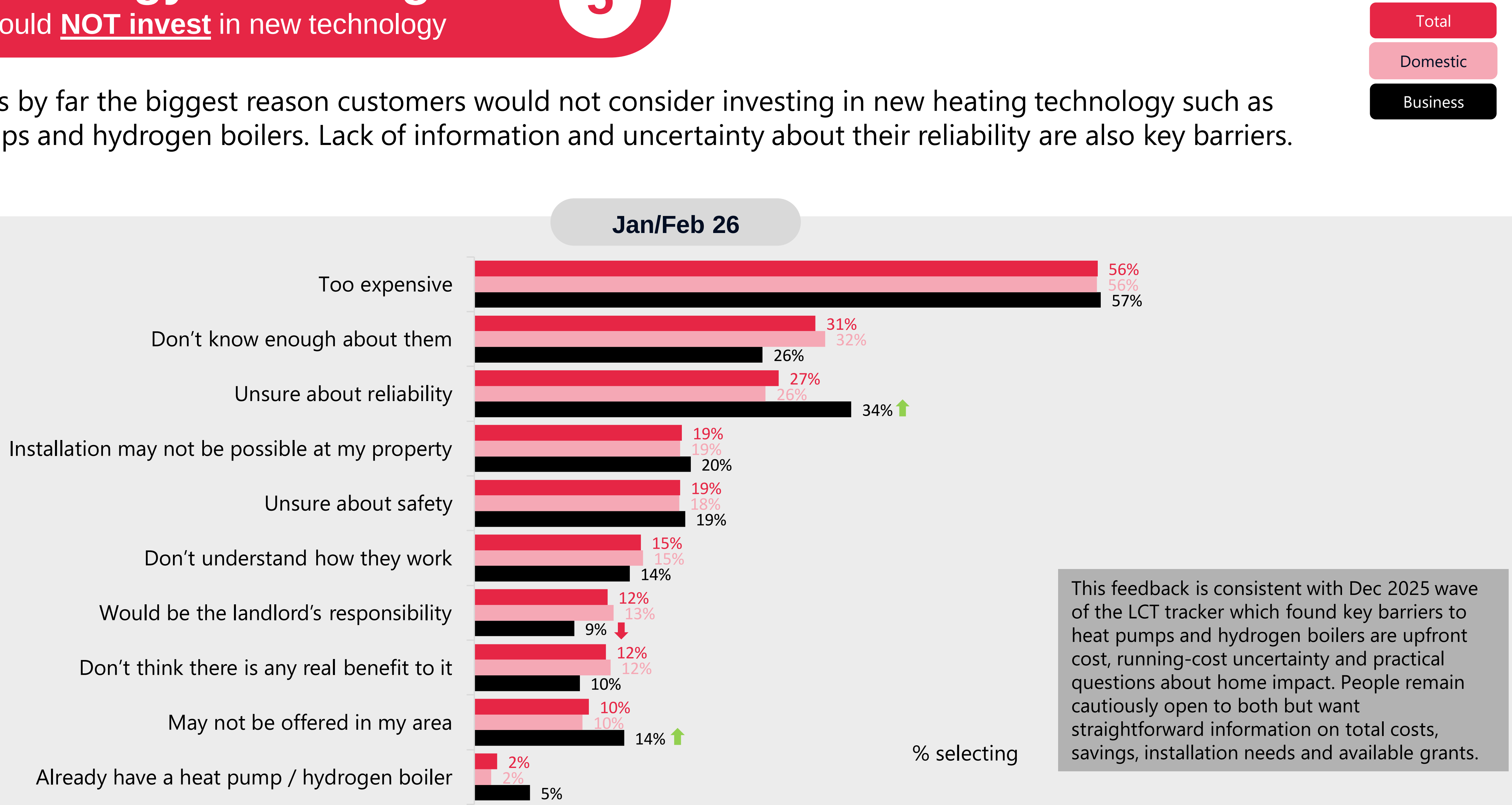
Future energy & heating

5

Reasons would **NOT invest** in new technology

NEW QUESTION

Expense is by far the biggest reason customers would not consider investing in new heating technology such as heat pumps and hydrogen boilers. Lack of information and uncertainty about their reliability are also key barriers.



This feedback is consistent with Dec 2025 wave of the LCT tracker which found key barriers to heat pumps and hydrogen boilers are upfront cost, running-cost uncertainty and practical questions about home impact. People remain cautiously open to both but want straightforward information on total costs, savings, installation needs and available grants.

Q28b. For you personally, are there any reasons you would NOT invest in new heating technology, such as a heat pumps or hydrogen boilers, etc? Please select up to 3 reasons.
Wave 6: 1302, Domestic 1102, Business: 200. New question in wave 6

Significantly higher/lower

Future energy & heating

Hydrogen and biomethane as a replacement for natural gas

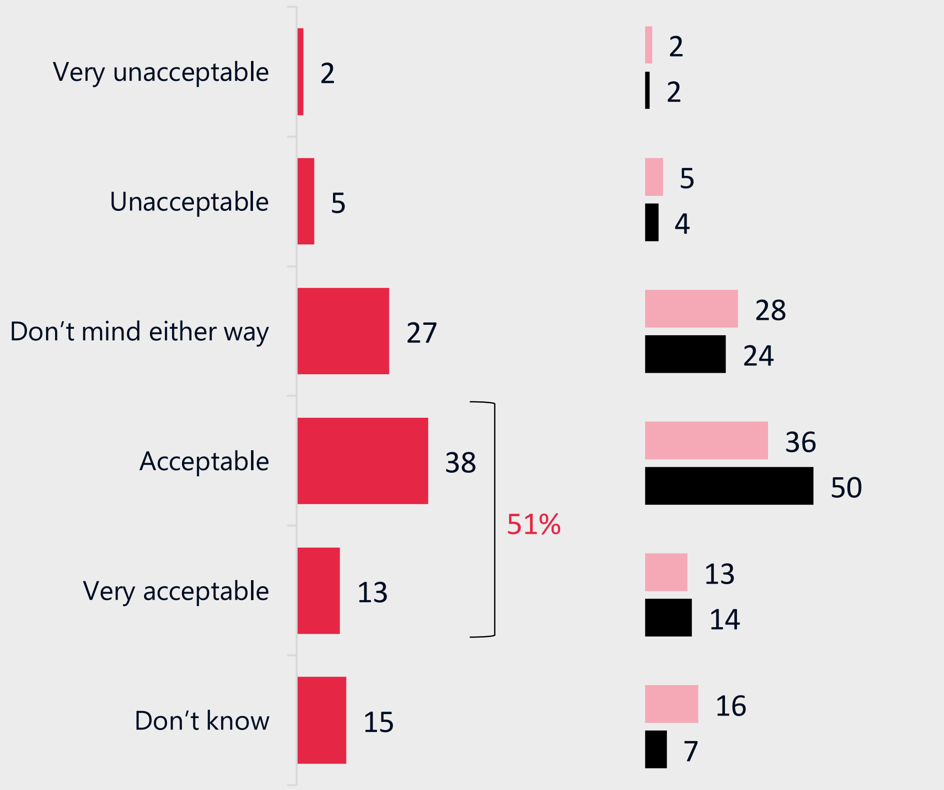
5

QUESTION ADDED IN WAVE 5

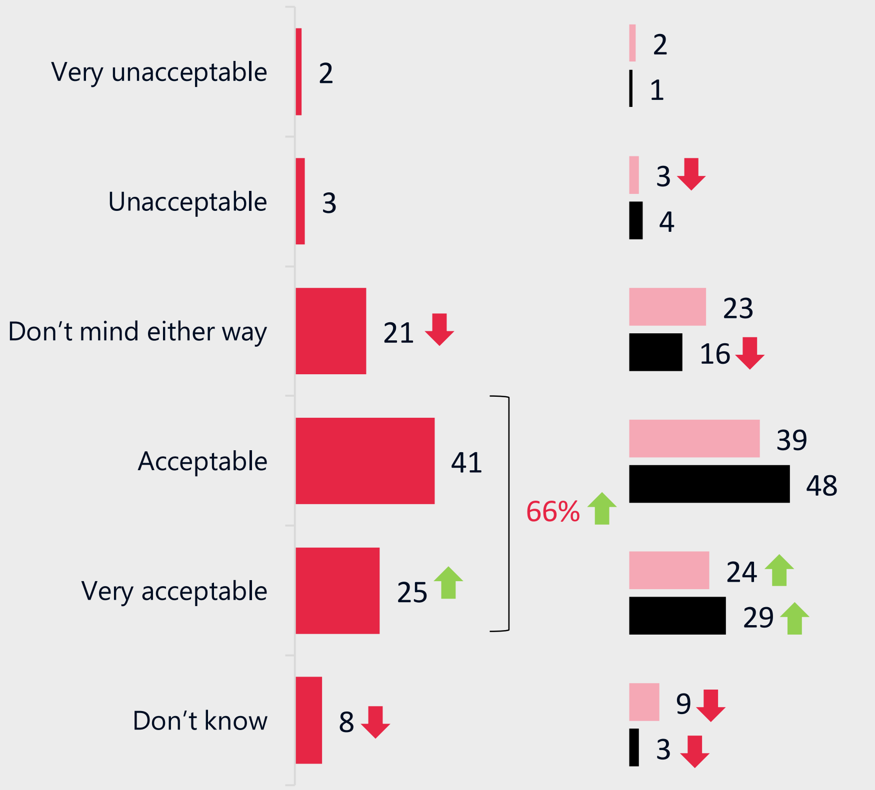
Total
Domestic
Business

Customers are generally accepting of the use of hydrogen and biomethane for industrial and commercial use, with only 5% finding this unacceptable. Acceptable scores have increased significantly since the previous wave (from 51% to 66%).

Acceptability of hydrogen – Jan 25



Acceptability of hydrogen and biomethane – Jan/Feb 26



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

Biomethane is a renewable, low-carbon gas made locally from organic waste that can be connected to NGN's network.

Using hydrogen and biomethane would help create new jobs and support economic growth.

Overall, how acceptable would that be to you?

Q26. In the future the current gas and power network might be used to supply low carbon gas like hydrogen and biomethane, instead of a methane gas, for industrial energy and power but not for home heating. Overall, how acceptable would that be to you? Weighted base: wave 5: 1423, Domestic: 1223, Business: 200, Weighted base: wave 6: 1302, Domestic: 1102, Business: 200. New question in wave 5

Significantly higher/lower than wave 5

Future energy & heating

Hydrogen and biomethane as a replacement for natural gas – by subgroup

5

QUESTION ADDED IN WAVE 5

There are no significant differences for business customers when it comes to views on using hydrogen and biomethane for industrial and commercial use.

Size of business – Jan/Feb 26 Business

	Size of Business		
	1 – 49 employees	50– 99 employees	100+ employees
Very unacceptable	3%	0%	0%
Unacceptable	6%	0%	4%
Don't mind either way	9%	12%	18%
Acceptable	48%	62%	45%
Very acceptable	30%	23%	30%
Don't know	3%	4%	3%

Ability to pay for bills – Jan/Feb 26 Business

	Bills	
	Pay without difficulty	Constant struggle / fall behind
Very unacceptable	0%	1%
Unacceptable	4%	4%
Don't mind either way	13%	19%
Acceptable	47%	51%
Very acceptable	34%	21%
Don't know	2%	4%

Q26. In the future the current gas and power network might be used to supply low carbon gas like hydrogen and biomethane, instead of a methane gas, for industrial energy and power but not for home heating. Overall, how acceptable would that be to you?
Weighted based; Wave 6: Business: 200, 1-49 employees: 33, 50-99 employees: 26, 100+ employees: 141; Pay without difficulty: 119, Constant struggle / fall behind: 75

Significantly higher/lower

Future energy & heating

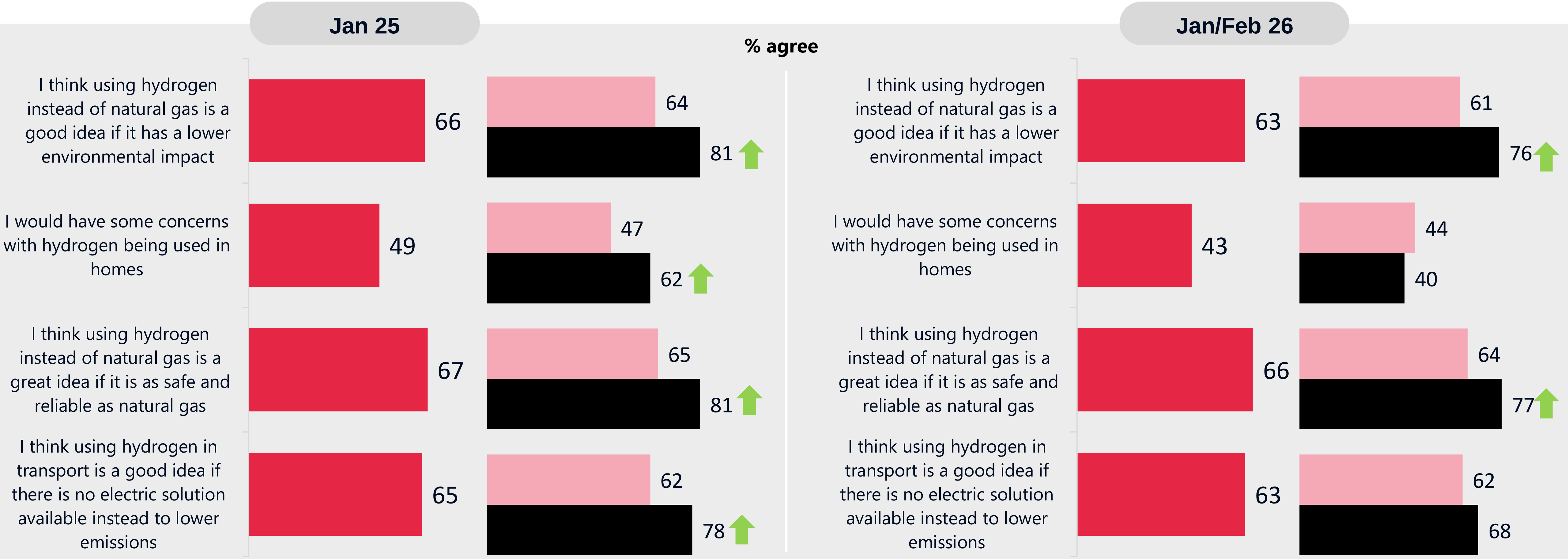
Attitudes to hydrogen as a replacement for natural gas

5

TRACKING QUESTION(S)

Total
Domestic
Business

Business customers continue to be more informed about potential use of hydrogen and more likely to think is a good idea. Overall attitudes remain relatively stable.



Q29. How much do you agree or disagree with the following statements?
Weighted base: wave 6: 1302, Domestic: 1102, Business: 200

Significantly higher/lower than total

Future energy & heating

Perception of hydrogen gas

5

TRACKING QUESTION(S)

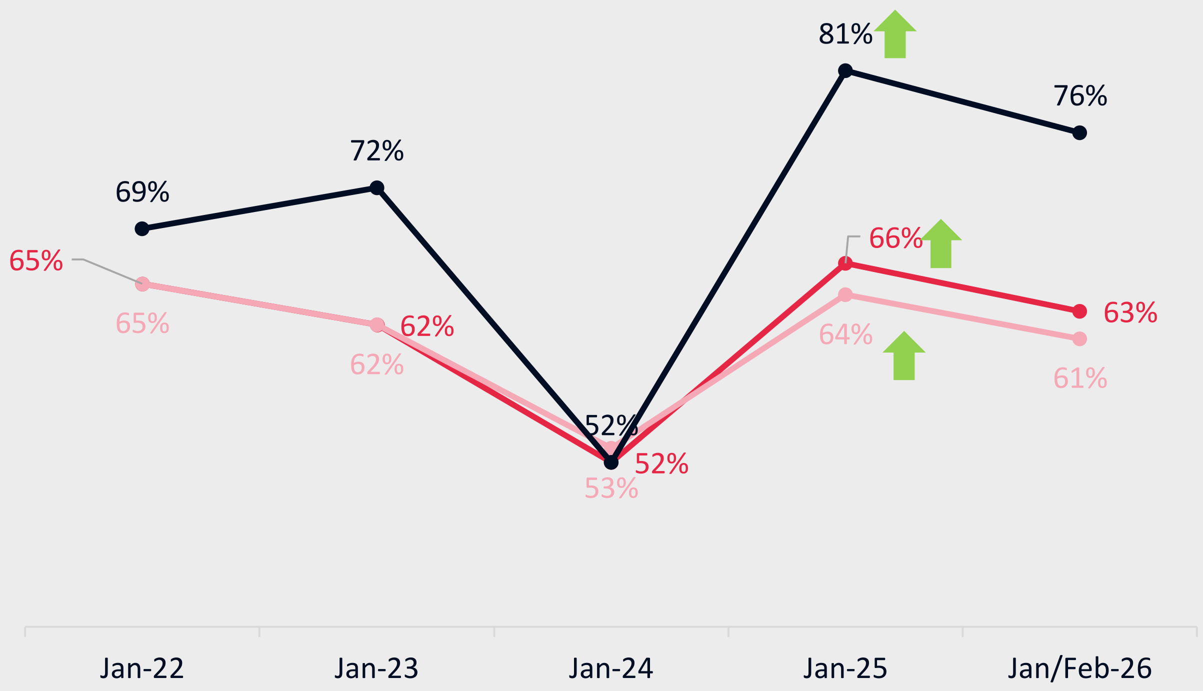
Total

Domestic

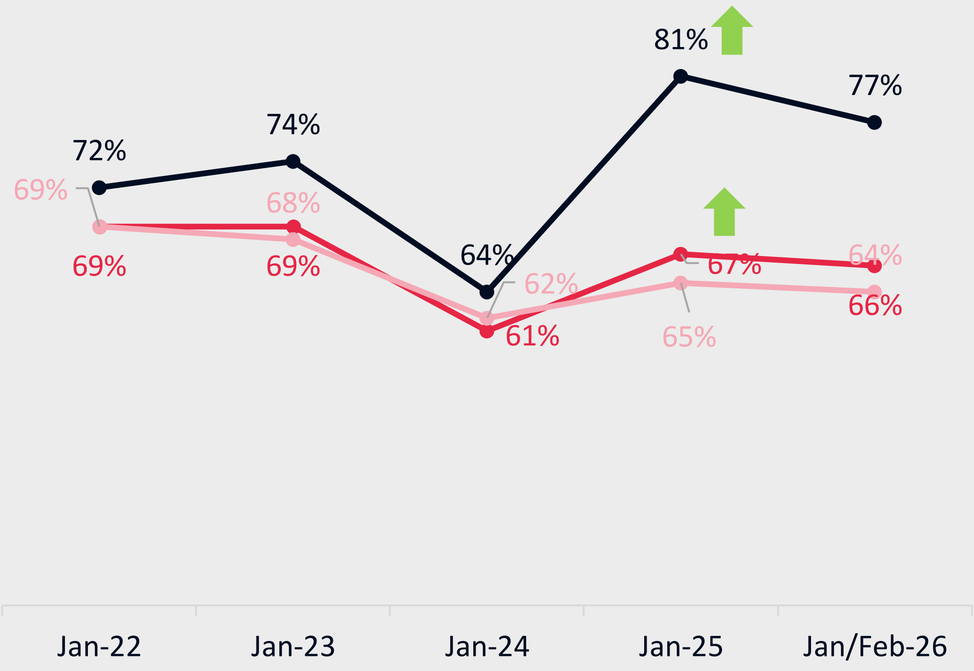
Business

Promoting the positive environmental benefits and safety and reliability of hydrogen is 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, wave 6: 1302, Domestic: 1102, Business: 200

Significantly higher/lower than previous wave

Future energy & heating

Perception of hydrogen gas

5

TRACKING QUESTION(S)

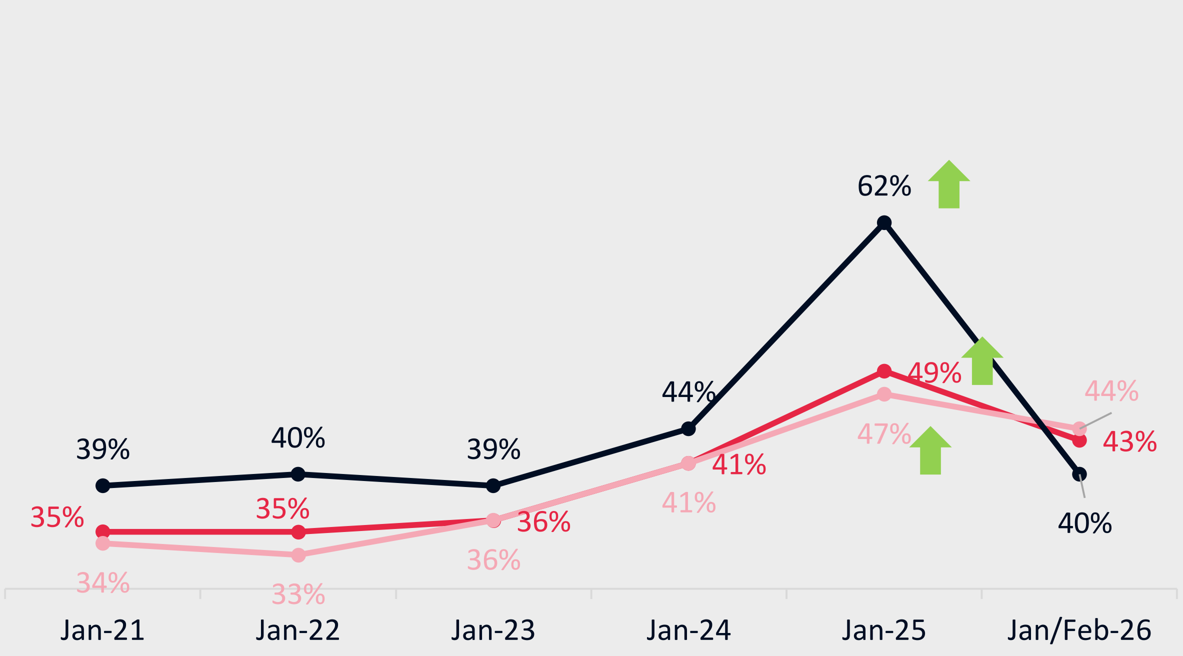
Total

Domestic

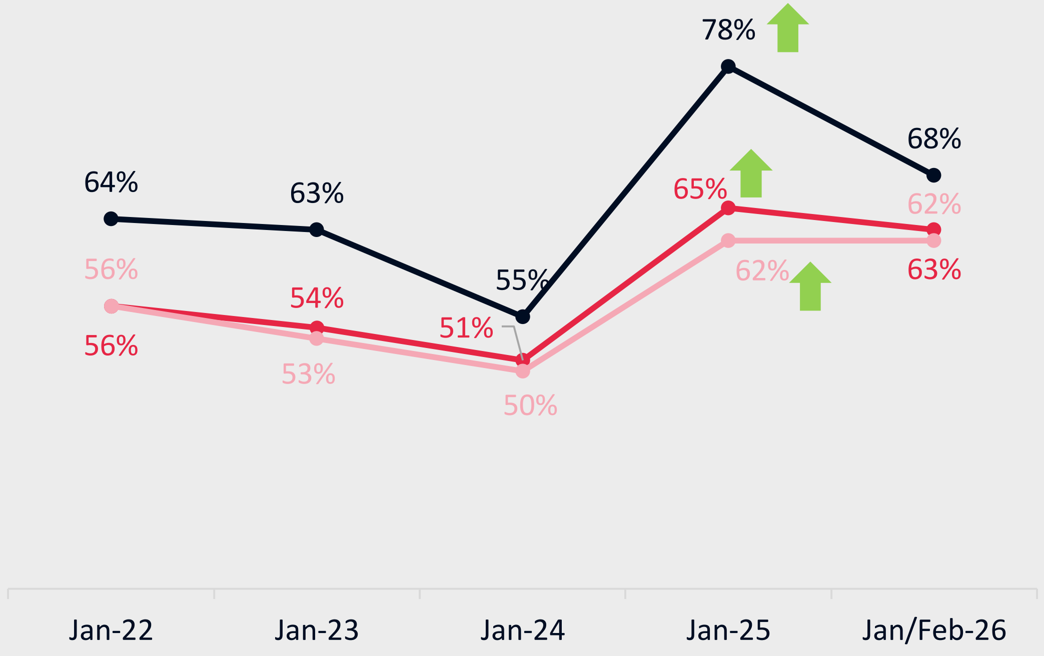
Business

Concerns about using hydrogen in homes have tapered off (significantly for business customers), and using hydrogen in transport is generally seen as a good idea

I would have some concerns with hydrogen being used in homes



I think using hydrogen in transport (e.g. buses) is a good idea if there is no electric solution available instead to lower emissions



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, Weighted base; wave 6: 1302, Domestic: 1102, Business: 200)

Significantly higher/lower than previous wave

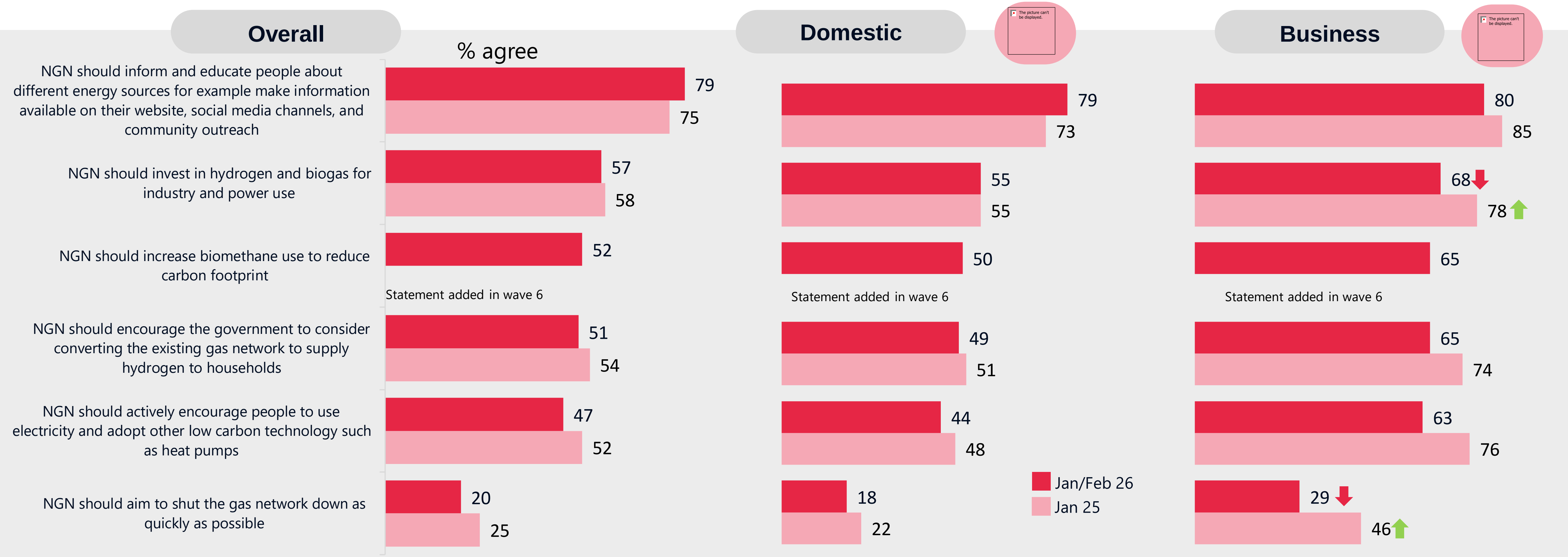
Future energy & heating

Role of NGN in transition to new energy sources

5

QUESTION ADDED IN WAVE 5

Three quarters of customers agree that NGN should inform and educate people about different energy sources. Business customers are much more interested in encouraging low carbon technology, conversion of the gas network to supply hydrogen for households and using hydrogen, biogas and biomethane.



Q30. As a Gas distributor, NGN could play several roles in the transition to different energy sources. How much do you agree or disagree with the following statements? Weighted base: wave 6: 1302, domestic 1102, business 200

Significantly higher/lower (business vs domestic)

Responsible business

6

1 Customer priorities for NGN employee inclusion initiatives focus mainly on offering flexible working arrangements, closing inequalities such as the gender pay gap and improving accessibility ranking highest. This is broadly consistent for both domestic and business customers.

2 Net zero is fairly unfamiliar territory for most: something they have heard of but don't know that much about. Only around a quarter are very familiar with what net zero means (more so for business customers).

3 Interest in receiving information on net zero is mixed, with around a quarter very interested, a quarter not interested at all and the other half possibly interested provided it's easy to understand (interest is higher for business customers).

4 Interest is mainly on information on how to reduce energy use, funding available and steps to lower carbon emissions. Nearly two thirds feel NGN should provide net zero information to all adults, but around 1 in 10 feel it is more relevant for those in vulnerable circumstances or in fuel poverty (particularly business customers).

Responsible business

NGN employee inclusion initiatives priorities

6

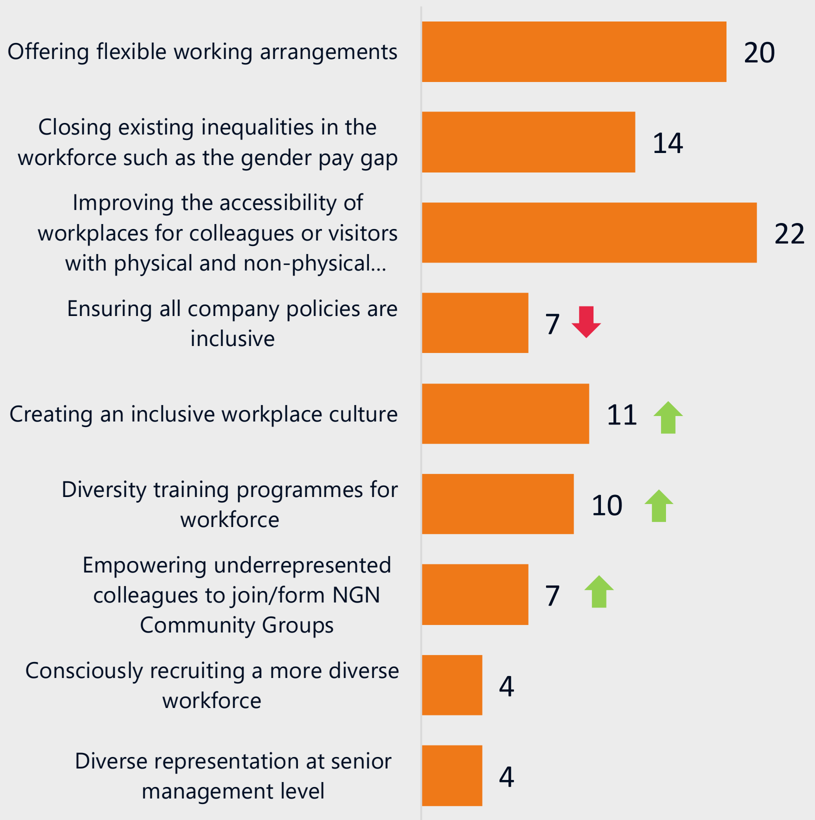
QUESTION ADDED IN WAVE 5

There is little variation between customers' priorities for NGN employee inclusion initiatives, with offering flexible working arrangements, closing inequalities such as the gender pay gap and improving accessibility ranking highest. This is broadly consistent for both domestic and business customers, and in line with 2025 feedback.

Overall

Domestic

Business



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 6: 1302, Domestic: 1102, Business: 200

Significantly higher/lower domestic vs business

Responsible business

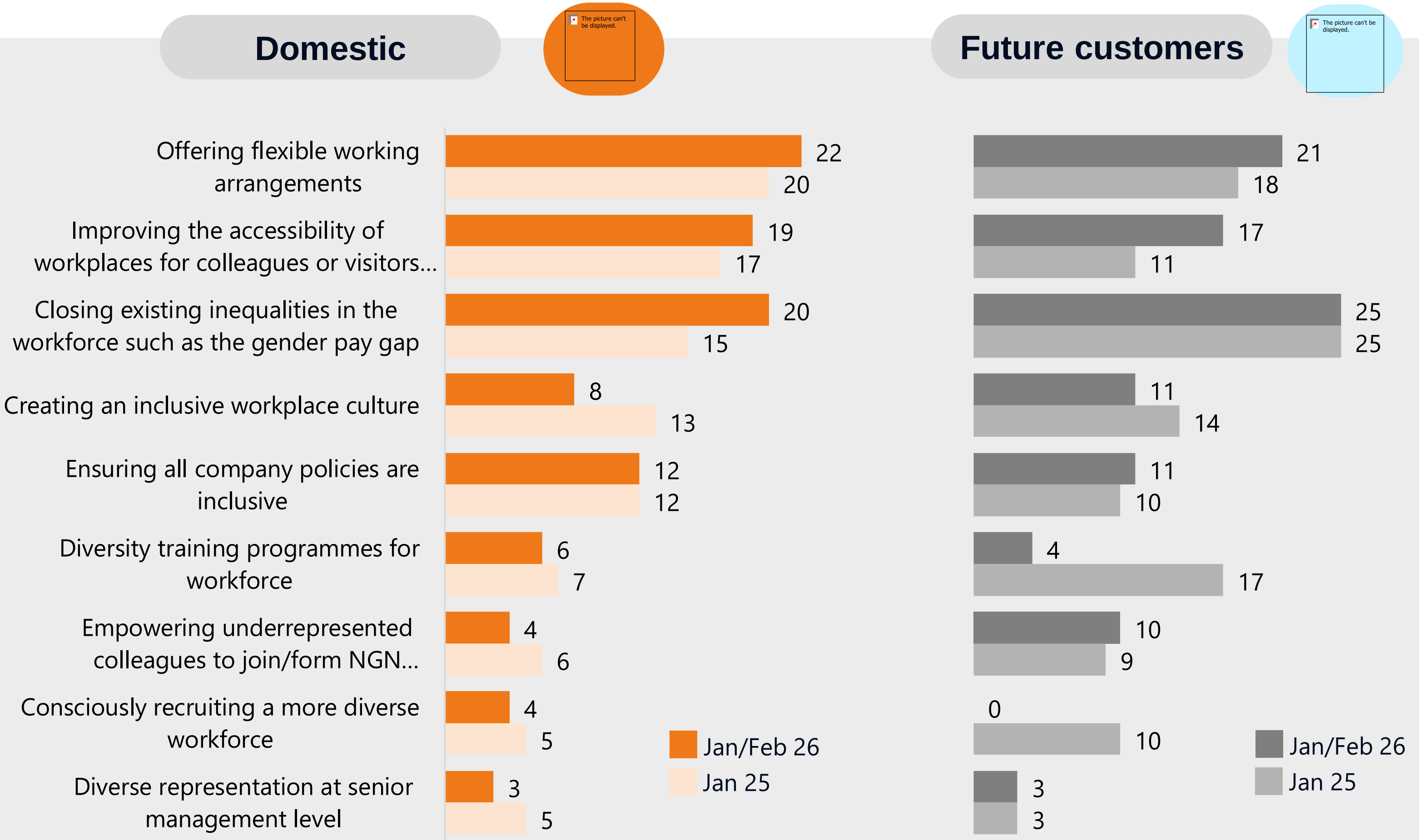
6

NGN employee inclusion initiatives priorities

QUESTION ADDED IN WAVE 5

Of particular importance to future customers is closing the gender pay gap and flexible working arrangements

Domestic
Future 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: Total: 551, Future customers: 29 Caution: low base size

Responsible business

Familiarity with net zero

6

NEW QUESTION

Only around a quarter are very familiar with what net zero means (more so for business customers). For most, net zero is something they have heard of but don't know that much about. Digitally disengaged customers and customers who struggle to pay their bills are more likely to say they are not familiar (38% and 20% respectively).

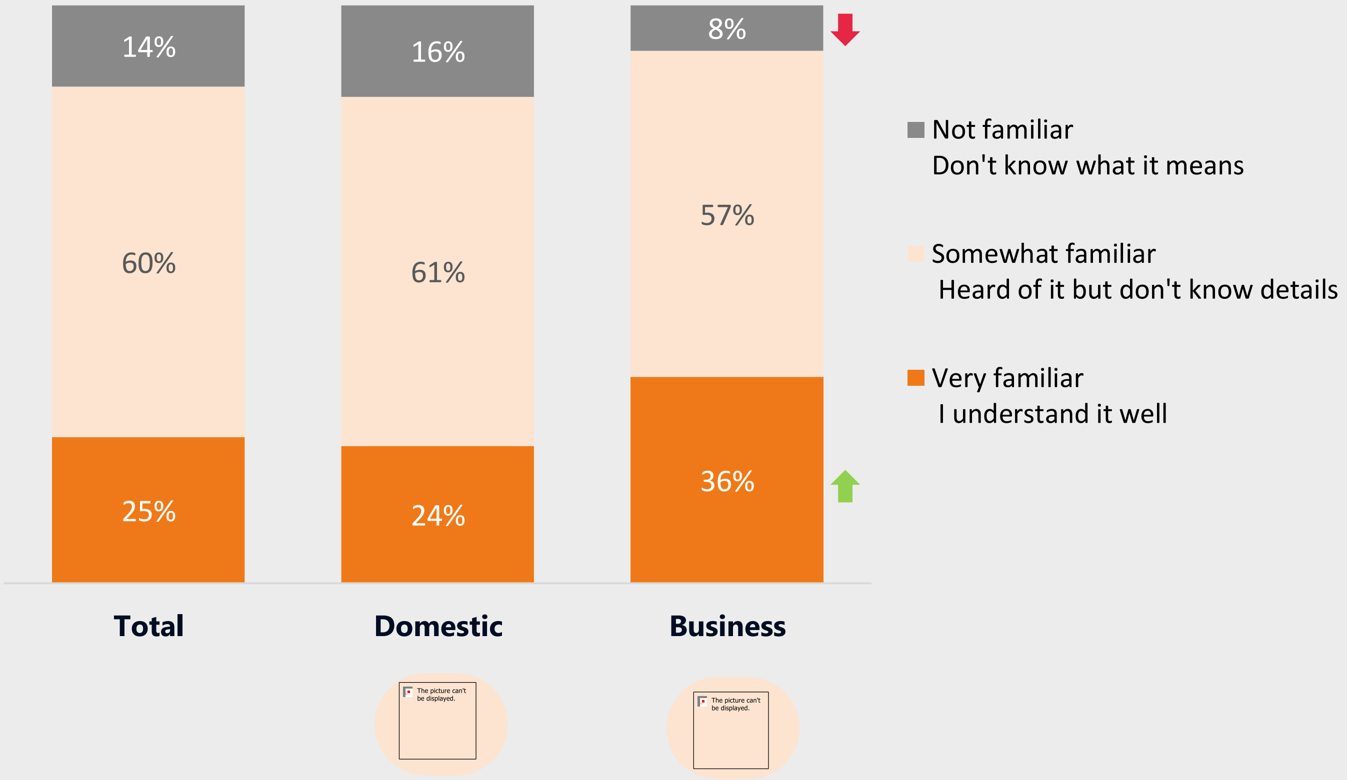
Jan/Feb 26

Earlier in the survey we highlighted how the UK aims to reach Net Zero by 2050, meaning cutting fossil fuel use so carbon emissions don't exceed what's removed from the atmosphere.

Net Zero education and reducing carbon emissions isn't currently covered by the curriculum in schools so young people aren't specifically taught about this in schools.

As such NGN has committed to providing education and raising awareness to 60,000 young people who are in education about Net Zero over the next 5 years through a dedicated Net Zero education team.

How familiar are you with the term 'Net Zero' and what it means for reducing carbon emissions?



Q39b. How familiar are you with the term 'Net Zero' and what it means for reducing carbon emissions?
(Weighted base; wave 6= 1302; Domestic: 1102; Business 200) New question added in wave 6

Significantly higher/lower domestic vs business

Responsible business

Familiarity with net zero – by subgroup

6

NEW QUESTION

Male customers and those of a higher socio-economic group who pay without difficulty are most familiar with net zero. There is low familiarity among customers who are digitally disengaged.

Age and gender – Jan/Feb 26 Domestic

	Age				Gender	
	18-29	30-49	50-69	70+	Male	Female
Very familiar – understand it well	30%	24%	20%	23%	35% ↑	14% ↓
Somewhat familiar – heard of it but don't know the details	49%	61% ↓	64%	65%	56% ↓	66% ↑
Not familiar – don't know what it means	21%	14%	15%	12%	10% ↓	20% ↑

PSR eligible – Jan/Feb 26 Domestic

	PSR Eligible	
	Yes	No
Very familiar – understand it well	21%	27%
Somewhat familiar – heard of it but don't know the details	64%	58%
Not familiar – don't know what it means	16%	15%

SEG – Jan/Feb 26 Domestic

	SEG			
	AB	C1	C2	DE
Very familiar – understand it well	31% ↑	25%	25%	15% ↓
Somewhat familiar – heard of it but don't know the details	54% ↓	64%	62%	62%
Not familiar – don't know what it means	14%	11% ↓	13%	23% ↑

Digital status/bills – Jan/Feb 26 Domestic

	Digital status		Bills	
	Digitally disengaged	Online	Pay without difficulty	Constant struggle / fall behind
Very familiar – understand it well	12% ↓	25% ↑	27% ↑	19% ↓
Somewhat familiar – heard of it but don't know the details	50% ↓	62% ↑	62%	61%
Not familiar – don't know what it means	38% ↑	13% ↓	11% ↓	20% ↑

Q39b. How familiar are you with the term 'Net Zero' and what it means for reducing carbon emissions?
(Weighted base; wave 6: Domestic: 1102. New question added in wave 6

↑↓ Significantly higher/lower than total

Responsible business

Familiarity with net zero – by subgroup

6

NEW QUESTION

There are no significant differences by subgroup on familiarity with the term net zero for businesses.

Size of business – Jan/Feb 26 Business

	Size of Business		
	1 – 49 employees	50 – 99 employees	100+ employees
Very familiar – understand it well	36%	38%	35%
Somewhat familiar – heard of it but don't know the details	55%	54%	57%
Not familiar – don't know what it means	9%	8%	8%

Ability to pay for bills – Jan/Feb 26 Business

	Bills	
	Pay without difficulty	Constant struggle / fall behind
Very familiar – understand it well	38%	32%
Somewhat familiar – heard of it but don't know the details	58%	56%
Not familiar – don't know what it means	4%	12%

Q39b. How familiar are you with the term 'Net Zero' and what it means for reducing carbon emissions?
Weighted based; Wave 6: Business: 200, 1-49 employees: 33, 50-99 employees: 26, 100+ employees: 141; Pay without difficulty: 119, Constant struggle / fall behind: 75

Significantly higher/lower than total

Responsible business

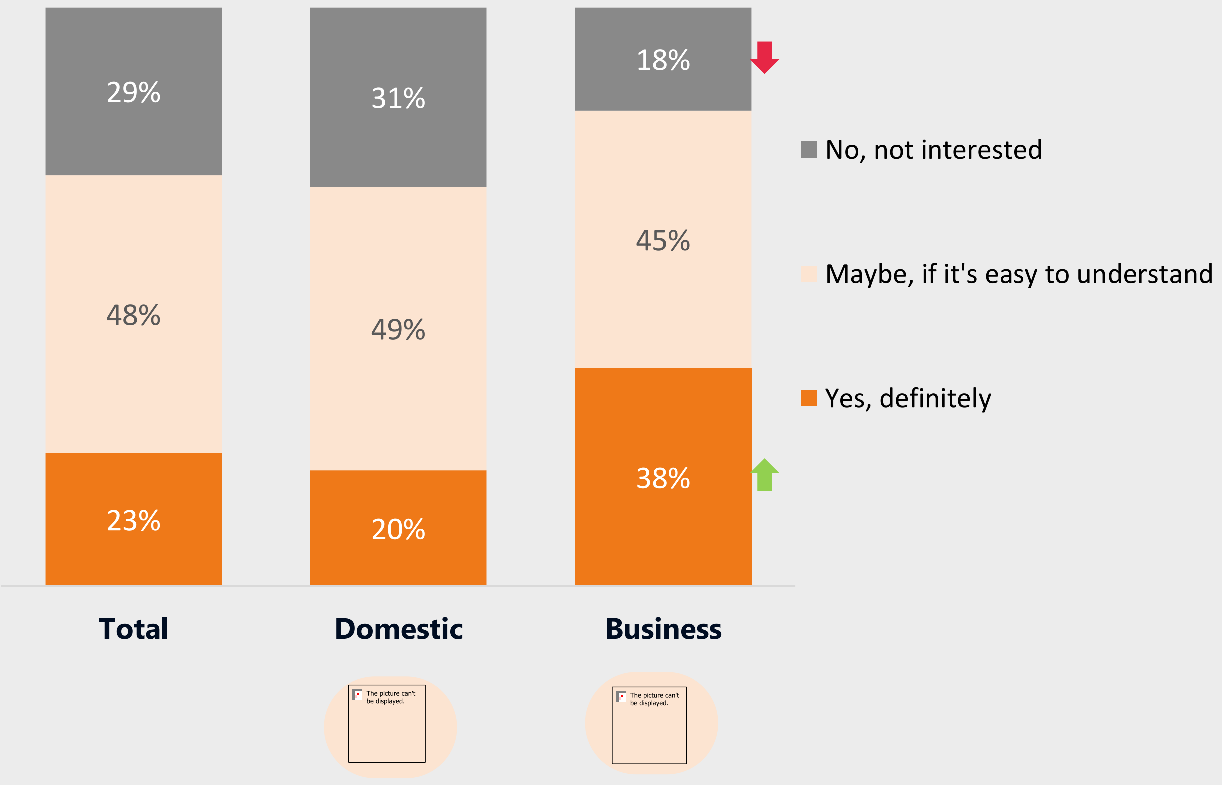
Interest in receiving information on net zero

6

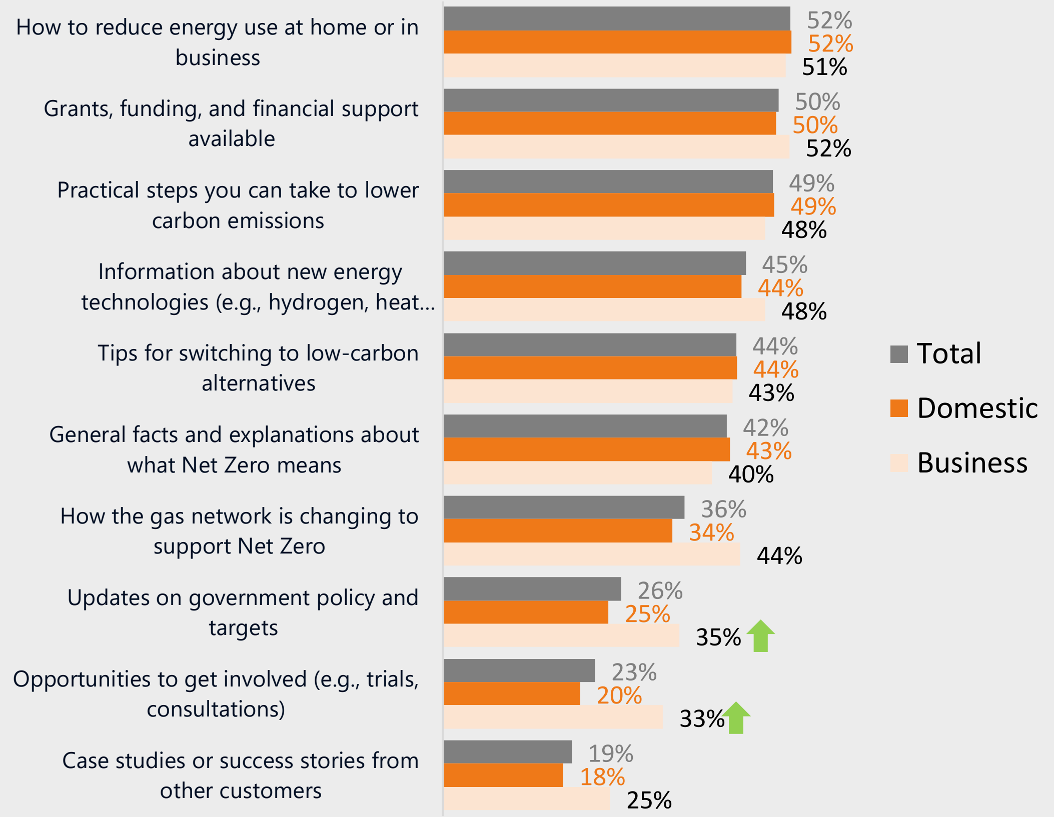
NEW QUESTION

Interest in receiving information on net zero is mixed, with around a quarter very interested, a quarter not interested at al and the other half possibly interested provided it's easy to understand (interest is higher for business customers). Interest is mainly on information on how to reduce energy use, funding available and steps to lower carbon emissions.

Whether interested in receiving information on achieving net zero



What information they would be interested in receiving



Q39c. Would you be interested in receiving information or guidance on how you can help achieve Net Zero? (Weighted base; wave 6= 1302; Domestic: 1102; Business 200) New question added in wave 6
Q39d. What information or guidance would you be interested in receiving? Please select all that apply. (Weighted base; wave 6= 930; Domestic: 765; Business 165) New question added in wave 6

Significantly higher/lower domestic vs business

Responsible business

6

Interest in receiving information on net zero – by subgroup

NEW QUESTION

Over half of digitally disengaged customers say they are not interested on receiving information on net zero. Higher levels of interest among those aged under 50, and AB customers.

Age and gender – Jan/Feb 26 Domestic

	Age				Gender	
	18-29	30-49	50-69	70+	Male	Female
Yes, definitely	25%	28%	17%	12%	22%	19%
Maybe, if it's easy to understand	55%	47%	46%	49%	45%	52%
No, not interested	20%	25%	37%	39%	34%	29%

PSR Eligible – Jan/Feb 26 Domestic

	PSR Eligible	
	Yes	No
Yes, definitely	20%	21%
Maybe, if it's easy to understand	50%	47%
No, not interested	30%	32%

SEG – Jan/Feb 26 Domestic

	SEG			
	AB	C1	C2	DE
Yes, definitely	31%	24%	15%	14%
Maybe, if it's easy to understand	42%	49%	51%	51%
No, not interested	27%	27%	34%	35%

Digital status/Bills – Jan/Feb 26 Domestic

	Digital status		Bills	
	Digitally disengaged	Online	Pay without difficulty	Constant struggle / fall behind
Yes, definitely	16%	21%	22%	19%
Maybe, if it's easy to understand	33%	50%	44%	54%
No, not interested	51%	29%	34%	27%

Q39c. Would you be interested in receiving information or guidance on how you can help achieve Net Zero?
(Weighted base; wave 6: Domestic: 1102. New question added in wave 6

Significantly higher/lower than total

Responsible business

Interest in receiving information on net zero – by subgroup

6

NEW QUESTION

Interest in receiving information on net zero does not differ significantly by subgroup for businesses.

Size of business – Jan/Feb 26 Business

	Size of Business		
	1 – 49 employees	50 – 99 employees	100+ employees
Yes, definitely	36%	27%	40%
Maybe, if it's easy to understand	45%	58%	42%
No, not interested	18%	15%	18%

Ability to pay for bills – Jan/Feb 26 Business

	Bills	
	Pay without difficulty	Constant struggle / fall behind
Yes, definitely	45%	27%
Maybe, if it's easy to understand	42%	51%
No, not interested	13%	23%

Q39c. Would you be interested in receiving information or guidance on how you can help achieve Net Zero?
Weighted based; Wave 6: Business: 200, 1-49 employees: 33, 50-99 employees: 26, 100+ employees: 141; Pay without difficulty: 119, Constant struggle / fall behind: 75

Significantly higher/lower than total

Responsible business

6

Net zero information interested in receiving – by subgroup

NEW QUESTION

Demographic differences on the type of information they would like to receive is minimal, with the exception of digital status, where digitally disengaged are less interested in most information.

Age and gender – Jan/Feb 26 Domestic

	Age				Gender	
	18-29	30-49	50-69	70+	Male	Female
How to reduce energy use at home or in business	48%	57%	54%	43%	49%	54%
Grants, funding, and financial support available	37% ↓	51%	54%	52%	48%	50%
Practical steps to lower carbon emissions	39% ↓	53%	55%	45%	45%	53%
Information about new energy technologies	33% ↓	47%	47%	47%	46%	43%
Tips for switching to low-carbon alternatives	36%	51%	45%	38%	41%	46%
General facts about what Net Zero means	37%	44%	46%	42%	37%	47%
How gas network is changing to support Net Zero	35%	40%	29%	31%	36%	32%
Updates on government policy and targets	31%	26%	19%	25%	25%	24%
Opportunities to get involved	24%	31% ↑	13% ↓	11% ↓	21%	20%
Case studies or success stories from customers	19%	22%	15%	13%	15%	19%

PSR Eligible – Jan/Feb 26 Domestic

	PSR Eligible	
	Yes	No
How to reduce energy use at home or in business	51%	53%
Grants, funding, and financial support available	52%	46%
Practical steps to lower carbon emissions	49%	50%
Information about new energy technologies	47%	41%
Tips for switching to low-carbon alternatives	46%	41%
General facts about what Net Zero means	44%	41%
How gas network is changing to support Net Zero	36%	31%
Updates on government policy and targets	25%	25%
Opportunities to get involved	20%	21%
Case studies or success stories from customers	18%	18%

SEG – Jan/Feb 26 Domestic

	SEG			
	AB	C1	C2	DE
How to reduce energy use at home or in business	59%	54%	46%	49%
Grants, funding, and financial support available	43%	49%	54%	52%
Practical steps to lower carbon emissions	55%	52%	50%	41%
Information about new energy technologies	53%	49%	39%	38%
Tips for switching to low-carbon alternatives	50%	49%	41%	36%
General facts about what Net Zero means	43%	43%	40%	45%
How gas network is changing to support Net Zero	41%	36%	31%	28%
Updates on government policy and targets	30%	24%	23%	23%
Opportunities to get involved	30% ↑	21%	17%	16%
Case studies or success stories from customers	26% ↑	16%	14%	18%

Digital status/Bills – Jan/Feb 26 Domestic

	Digital status		Bills	
	Digitally disengaged	Online	Pay without difficulty	Constant struggle / fall behind
How to reduce energy use at home or in business	35% ↓	53% ↑	54%	51%
Grants, funding, and financial support available	43%	50%	47%	53%
Practical steps to lower carbon emissions	27% ↓	51% ↑	53%	46%
Information about new energy technologies	27% ↓	46% ↑	47%	42%
Tips for switching to low-carbon alternatives	29% ↓	45% ↑	42%	46%
General facts about what Net Zero means	41%	43%	43%	42%
How gas network is changing to support Net Zero	24%	35%	36%	31%
Updates on government policy and targets	8% ↓	26% ↑	25%	24%
Opportunities to get involved	8% ↓	21% ↑	20%	21%
Case studies or success stories from customers	2% ↓	19% ↑	17%	18%

Q39d. What information or guidance would you be interested in receiving? Please select all that apply.
(Weighted base; wave 6: Domestic: 765. New question added in wave 6

↑↓ Significantly higher/lower than total

Responsible business

Net zero information interested in receiving – by subgroup

6

NEW QUESTION

The type of information businesses would like to receive also does not differ significantly by subgroup.

Size of business – Jan/Feb 26 Business

	Size of Business		
	1 – 49 employees	50 – 99 employees	100+ employees
Grants, funding, and financial support available	70%	45%	48%
How to reduce energy use at home or in business	44%	64%	50%
Practical steps you can take to lower carbon emissions	52%	27%	51%
Information about new energy technologies	56%	45%	47%
How the gas network is changing to support Net Zero	59%	41%	41%
Tips for switching to low-carbon alternatives	44%	36%	44%
General facts and explanations about what Net Zero means	44%	27%	41%
Updates on government policy and targets	37%	32%	35%
Opportunities to get involved (e.g., trials, consultations)	44%	36%	29%
Case studies or success stories from other customers	30%	18%	25%

Ability to pay for bills – Jan/Feb 26 Business

	Bills	
	Pay without difficulty	Constant struggle / fall behind
Grants, funding, and financial support available	50%	53%
How to reduce energy use at home or in business	51%	50%
Practical steps you can take to lower carbon emissions	50%	43%
Information about new energy technologies	52%	38%
How the gas network is changing to support Net Zero	50%	33%
Tips for switching to low-carbon alternatives	47%	36%
General facts and explanations about what Net Zero means	41%	34%
Updates on government policy and targets	40%	26%
Opportunities to get involved (e.g., trials, consultations)	38%	24%
Case studies or success stories from other customers	22%	28%

Q39d. What information or guidance would you be interested in receiving? Please select all that apply.
Weighted based; Wave 6: Business: 200, 1-49 employees: 33, 50-99 employees: 26, 100+ employees: 141; Pay without difficulty: 119, Constant struggle / fall behind: 75

Significantly higher/lower than total

Responsible business

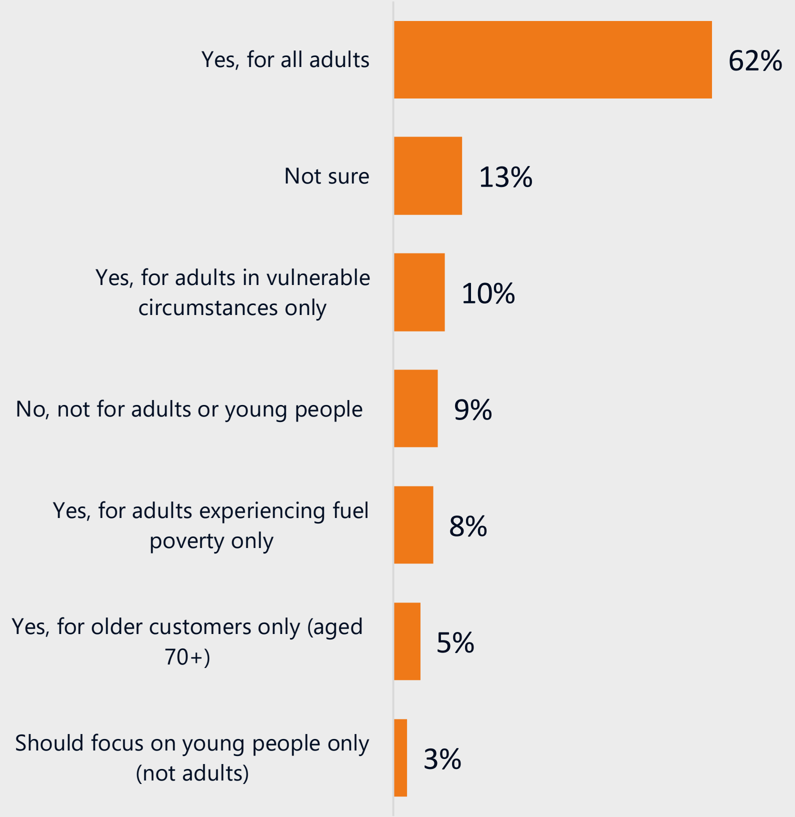
Who NGN should provide information on net zero to?

6

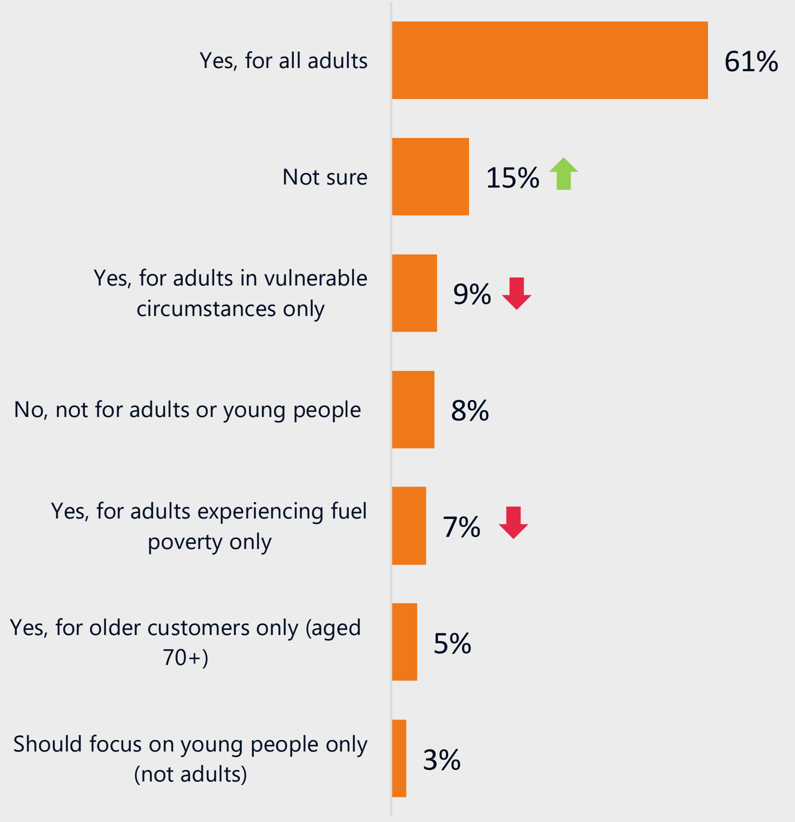
NEW QUESTION

Whilst nearly two thirds feel NGN should provide net zero information to all adults, around 1 in 10 feel it is more relevant for those in vulnerable circumstances or in fuel poverty (particularly business customers).

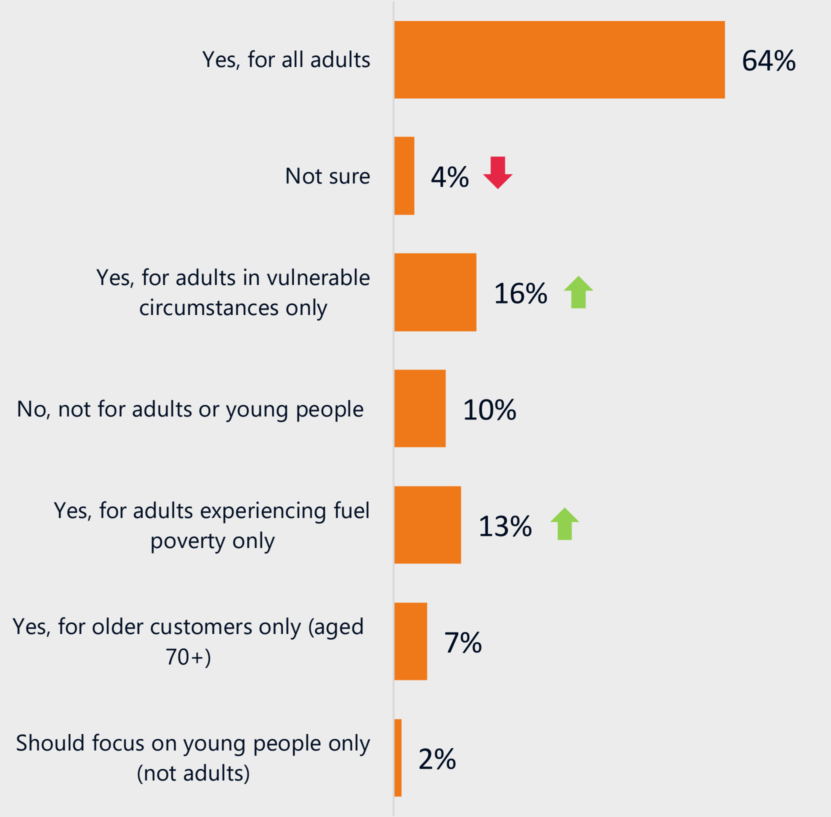
Overall



Domestic



Business



Q39e. Do you think NGN should provide Net Zero education and awareness to adults (aged 18 and over), as well as to young people? Please select all that apply
(Weighted base; wave 6= 1302; Domestic: 1102; Business 200) New question added in wave 6

Significantly higher/lower domestic vs business

Responsible business

6

Who NGN should provide information on net zero to? – by subgroup

NEW QUESTION

Younger age groups and women are more likely to think all adults should be given information on Net Zero.

Age and gender – Jan/Feb 26 Domestic

	Age				Gender	
	18-29	30-49	50-69	70+	Male	Female
Yes, for all adults	72% ↑	67% ↑	58%	48% ↓	56% ↓	65% ↑
Not sure	8% ↓	13%	17%	21% ↑	14%	16%
Yes, for adults in vulnerable circumstances only	11%	9%	7%	9%	10%	8%
No, not for adults or young people	0% ↓	5%	12% ↑	13% ↑	11% ↑	6%
Yes, for adults experiencing fuel poverty only	7%	9%	6%	5%	7%	6%
Yes, for older customers only (aged 70+)	1% ↓	5%	5%	8% ↑	6%	4%
Should focus on young people only (not adults)	3%	2%	3%	5%	4%	2%

PSR Eligible – Jan/Feb 26 Domestic

	PSR Eligible	
	Yes	No
Yes, for all adults	61%	61%
Not sure	13%	17%
Yes, for adults in vulnerable circumstances only	12% ↑	5% ↓
No, not for adults or young people	8%	9%
Yes, for adults experiencing fuel poverty only	9% ↑	4% ↓
Yes, for older customers only (aged 70+)	7% ↑	3% ↓
Should focus on young people only (not adults)	2%	4%

SEG – Jan/Feb 26 Domestic

	SEG			
	AB	C1	C2	DE
Yes, for all adults	63%	66%	55%	60%
Not sure	13%	14%	15%	17%
Yes, for adults in vulnerable circumstances only	8%	8%	8%	11%
No, not for adults or young people	10%	8%	11%	6%
Yes, for adults experiencing fuel poverty only	7%	6%	9%	7%
Yes, for older customers only (aged 70+)	5%	4%	5%	7%
Should focus on young people only (not adults)	2%	2%	5%	3%

Digital status/Bills – Jan/Feb 26 Domestic

	Digital status		Bills	
	Digitally disengaged	Online	Pay without difficulty	Constant struggle / fall behind
Yes, for all adults	68%	60%	60%	62%
Not sure	14%	15%	15%	14%
Yes, for adults in vulnerable circumstances only	8%	9%	7%	11%
No, not for adults or young people	3%	9%	10%	7%
Yes, for adults experiencing fuel poverty only	4%	7%	6%	8%
Yes, for older customers only (aged 70+)	8%	5%	5%	5%
Should focus on young people only (not adults)	2%	3%	4%	2%

Q39e. Do you think NGN should provide Net Zero education and awareness to adults (aged 18 and over), as well as to young people? Please select all that apply
(Weighted base; wave 6: Domestic: 1102. New question added in wave 6

↑↓ Significantly higher/lower than total

Vulnerability

7

1 Medical dependence on energy and financial hardship are still considered the most important vulnerability categories that NGN should focus on.

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.

3 NGN is also seen as well placed to support those who are medically dependent on energy, in financial hardship or rurally vulnerable.

4 Customers feel NGN would often have prior knowledge of these issues (customers may have alerted them and rural postcodes are known to NGN) and financial means to help.

Vulnerability

Vulnerability dimensions and initiatives

7

Customers were asked a series of questions relating to NGN's 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.

A. Physical Challenges
A1 Blind / Partially sighted
A2 Hearing impairment
A3 Poor mobility
A4 Restricted hand movement
A5 Unable to answer door
A6 Chronic/serious illness
A7 Poor sense of smell/taste

B. Mental Wellbeing
B1 Neuro diverse
B2 Specific learning difficulty
B3 Mental health challenges
B4 Addiction

C. Financial Hardship
C1 Fuel poor
C2 Unemployed
C3 Pre-payment meters

D. Temporary vulnerability
D1 Post hospital recovery
D2 Pregnancy and maternity
D3 Young adult householder
D4 Life changes

E. Socio-demographic
E1 Ethnic minority groups
E2 Lesbian, Gay, Bisexual, Transgender, and Queer people
E3 Younger people
E4 Pensionable age
E5 Families with young children <5
E6 Gender reassignment
E7 Military veterans
E8 Ex-offenders

F. Household composition
F1 Refugees/asylum seekers/newly arrived communities
F2 Gypsy, Roma Traveller (transitory communities)
F3 People who are homeless
F4 Carers
F5 People living in tower blocks
F6 Single parents
F7 Working location (Office, outdoors, home)

G. Rural vulnerability
G1 Farming communities
G2 Geographically remote

H. Accessibility including language
H1 No/ limited access to digital technology
H2 English not first language
H3 A social / communicate\on impairment
H4 Limited in free time

I. Medically Dependant on Energy
I1 Nebuliser and Apnoea monitor
I2 Medicine refrigeration
I3 Oxygen Use
I4 Stair Lift, Hoist, Electric bed
I5 Heart, lung & Ventilator
I6 Dialysis, feeding pump and automated medication
I7 Oxygen Concentrator
I8 Other medical dependency

J. Cultural
J1 Faith Groups

Vulnerability

Vulnerability categories **most important** to customers

7

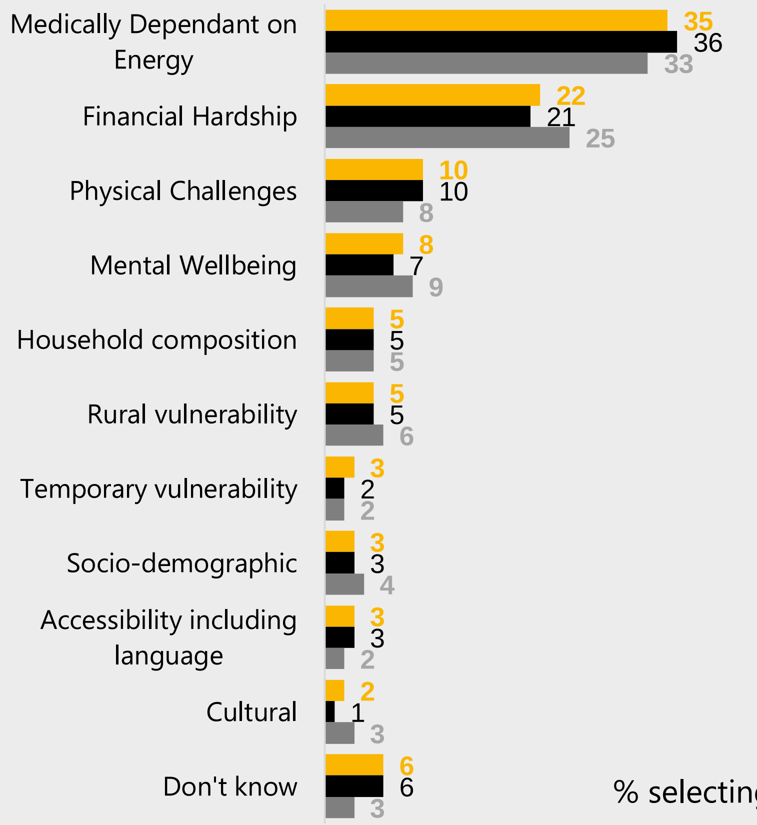
TRACKING QUESTION(S)

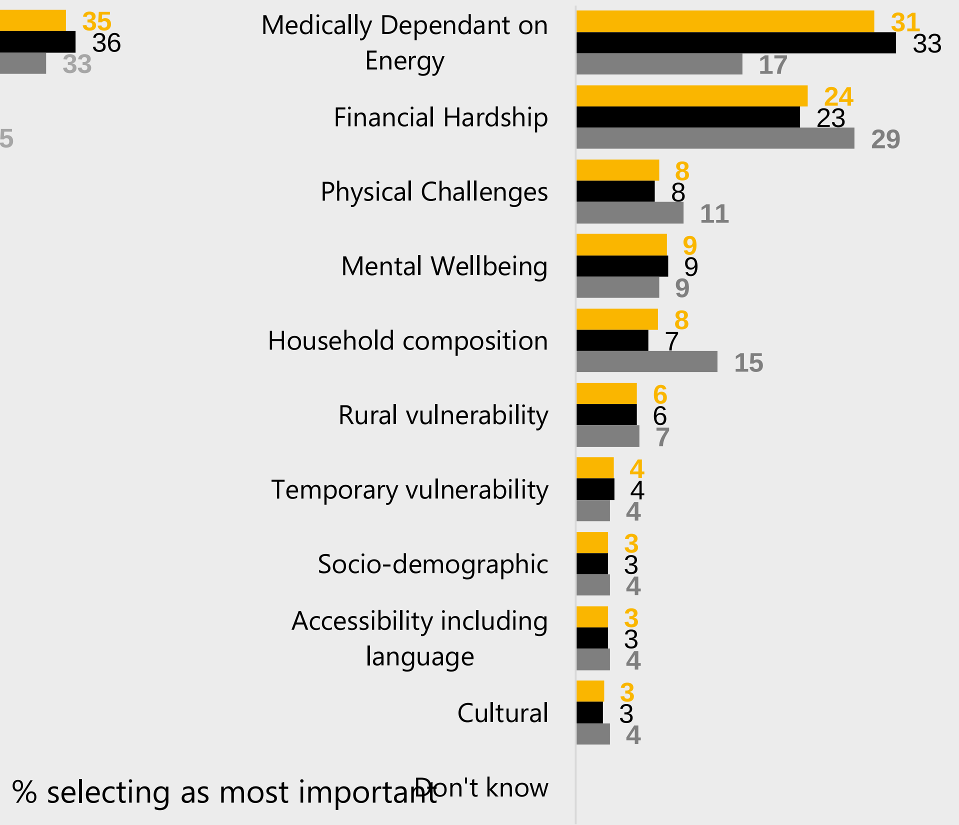
Total

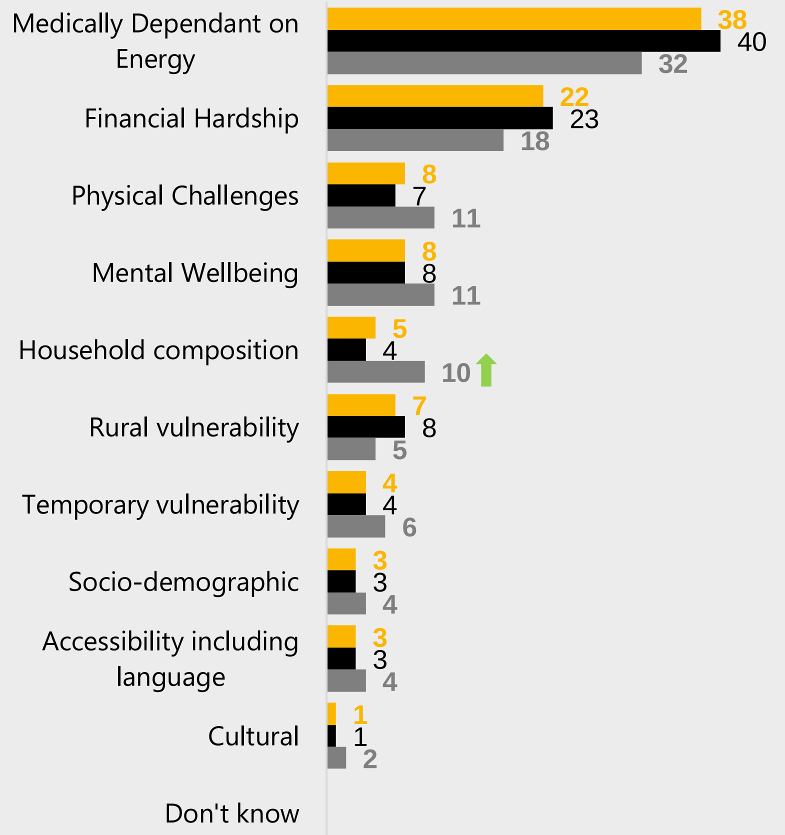
Domestic

Business

Medical dependence on energy and financial hardship continue to be considered the most important vulnerability categories, with physical challenges and mental wellbeing secondary.







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, Weighted base; wave 6: 1302, Domestic: 1102, Business: 200) New question in wave 4

Significantly higher/lower than total

Vulnerability

Reasons why these categories **most important**

7

QUESTION ADDED IN WAVE 5

Customers appreciate the life-or-death situation for those who are medically dependent, and the challenges for those in financial difficulty. Secondary to these are physical challenges like disabilities and mental wellbeing.

Primary importance

Medically dependent

This is important as this is a matter of life or death

If their energy is disrupted, they could suffer significant harm

They need power to live

They need medical equipment to survive

In many cases they depend on energy to keep them alive, i think that qualifies as most important.

Because the people in this group really rely on the energy and I feel like it would be more important for them to have energy than others

Financial challenges

They are the most needy

Everyone has a right to a warm home

Because of the cost-of-living crisis we should be helping those financially struggling first

A record number of people are being drawn into fuel poverty

Fuel bills have rocketed in recent times and the most vulnerable should be helped as much as possible

I said financial hardship is the most important because not being able to afford energy has a direct, immediate impact on people's daily lives

Secondary importance

Physical challenges

I am disabled and some things are difficult

Some people can't move around easy to keep warm

We are elderly and disabled, so keeping warm is a major concern

Because people may be housebound

I found this one difficult as they are all worthy but just thought of people housebound through physical challenges

Elderly and handicapped people require a reliable and consistent gas supply for their homes

Mental wellbeing

They are vulnerable people

Because there is a mental health epidemic

Because I have suffered from mental health problems for most of my life

It's important that mental health is recognised

Due to increased suicide rates it's important to look after your mental wellbeing

Because it is a big problem in this country and needs priority

Q33. Why is this most important?. New question in wave 5

Vulnerability

Reasons why these categories **least important**

7

QUESTION ADDED IN WAVE 5

The groups considered least vulnerable were cultural, accessibility, socio-demographic and temporary vulnerability. Many simply don't see why these groups should be a priority when compared to groups like those who are medically dependent or in financial hardship. And temporary vulnerability is something that will only last a while so seen as less important.

Cultural / faith group

- Why would this affect anything
- Not sure why cultural issues would be relevant in the context of energy supply
- Why should this make a difference?
- People should not get preferential treatment due to their religion that is prejudice
- It is least important because one can still practice his or her faith without access to electricity
- Don't think it's particularly relevant - reliable, affordable energy is a universal human need, regardless of culture, religion or background

Accessibility including language

- I believe English is one of the most common languages spoken so this issue won't be widespread
- They should learn English
- I don't think that counts as a disability
- I fail to see why language should be a deciding issue
- I don't believe speaking a different language makes them a priority
- Everyone deserves to be helped - however I'd say people with medical problems, low income etc should be a priority. However, everyone should be helped - it was difficult to rank these

Socio-demographic

- More important things to prioritise than that
- This group of people don't have a financial hardship
- It shouldn't matter what anyone's background is. It is not a key factor.
- I feel like that doesn't effect energy bills
- That is at the very bottom of the list as many are life choices rather than a challenge beyond a person's/family's control, therefore in many cases of lower importance.
- That doesn't affect how they pay for these things or access them

Temporary vulnerability

- Because it's only temporary
- Because lots of people suffer with temporary vulnerability
- Depend on the personal situation however it is not long term
- Because it is a temporary thing and will be gone soon
- Temporary vulnerability feels least important to me because most people face it at some point (like illness, pregnancy or job loss), but it's often short-term and support exists
- It is only for a short period of time like it says temporary don't need full on support

Q34. Why is this least important?. New question in wave 5

Vulnerability

Vulnerabilities NGN **best placed** to support

7

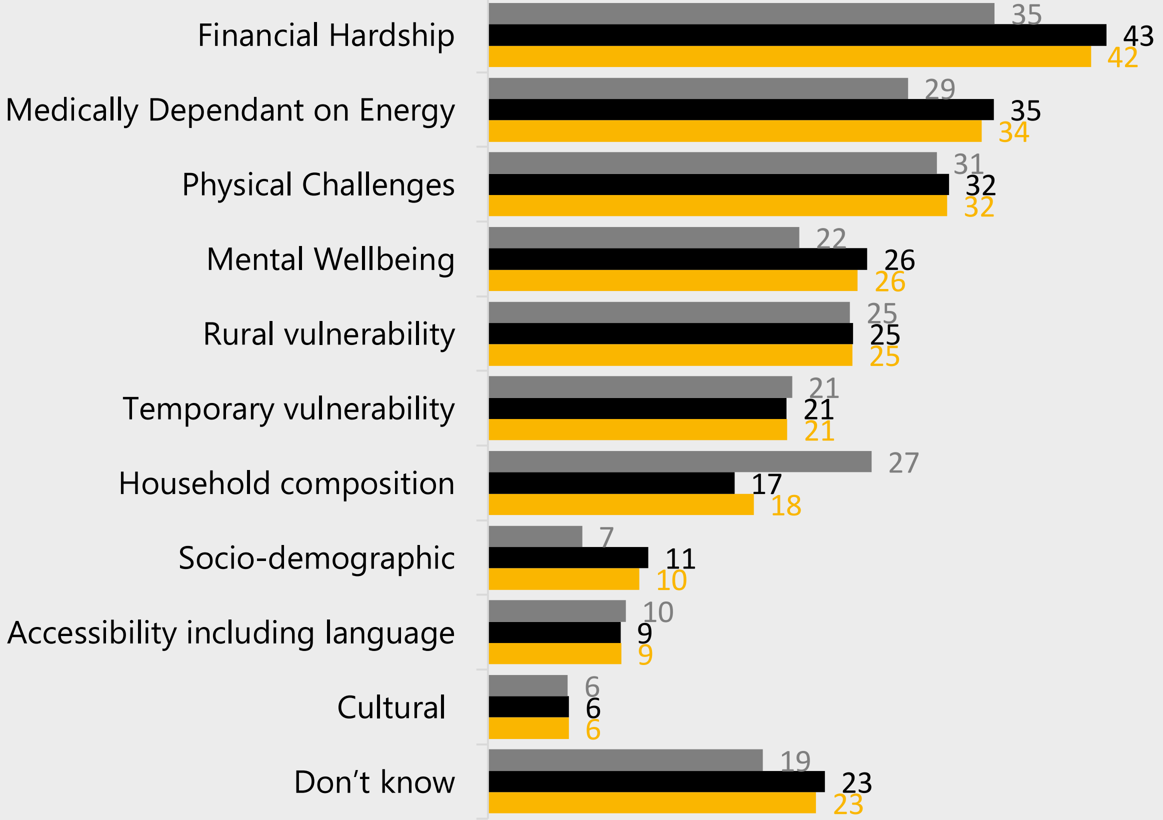
QUESTION ADDED IN WAVE 5

Total
Domestic
Business

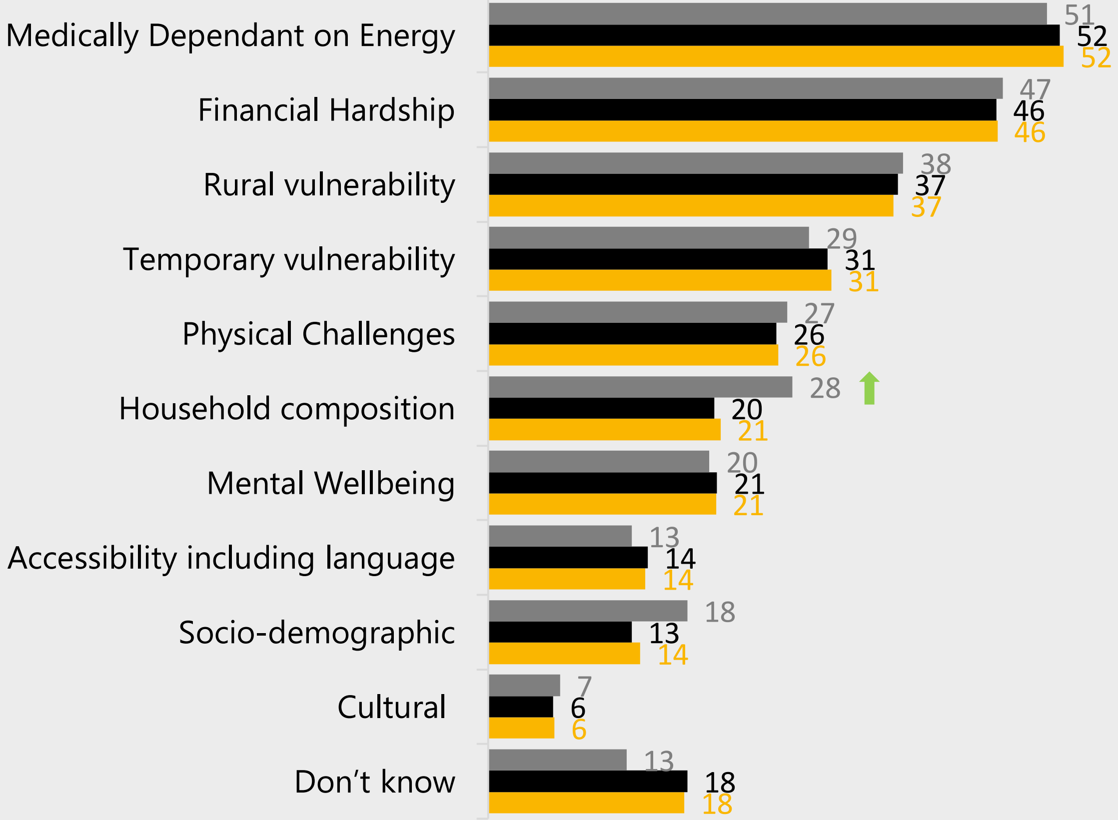
NGN is seen as best placed to support those who are medically dependent on energy or in financial hardship. Around a third also feel NGN is well placed to support those who are rurally vulnerable or have a temporary vulnerability.

% selecting

Jan 25



Jan/Feb 26



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: 1223, Business: 200, Wave 6: 1302, Domestic 1102, Business: 200. New question in wave 5

Significantly higher/lower than total

Vulnerability

Why NGN best placed to support these categories

7

QUESTION ADDED IN WAVE 5

Customers feel that NGN should have knowledge of whether a customer is medically dependent on energy, or rurally vulnerable based on their postcode, and in many cases if they are in financial hardship due to customers alerting NGN of this. As a large organisation they are viewed as having the capacity to help these key vulnerable groups.

Medically dependent

I have heard about schemes to help these groups

Many of these groups will already be known to their suppliers

They can directly identify them

Because they could ensure energy supply is maintained in these cases

I think they can include them on a vulnerable people list to ensure they get help in a timely manner if it is needed

Financial challenges

They have the capacity to help

Being such a large company I believe they can help people with financial support

They have the resources and they can easily access any necessary data

There are a lot of people at the moment in the UK in fuel poverty

I can empathise with how financial difficulties could limit someone's life

Sometimes people have hardships and need a helping hand. It would be good to know there is a support network for those in genuine need

Rural vulnerability

They should be knowledgeable about these areas

They distribute energy so clearly they are best placed to distribute gas to rural areas

I think they have the power to increase accessibility for rural areas

As I believe that you would have the most experience in dealing with rural housing and people suffering financially rather than be focused on more social issues

Q36. Why do you say this? Wave 6: 1302, Domestic 1102, Business: 200. New question in wave 5

Vulnerability

Vulnerabilities NGN **NOT** best placed to support

7

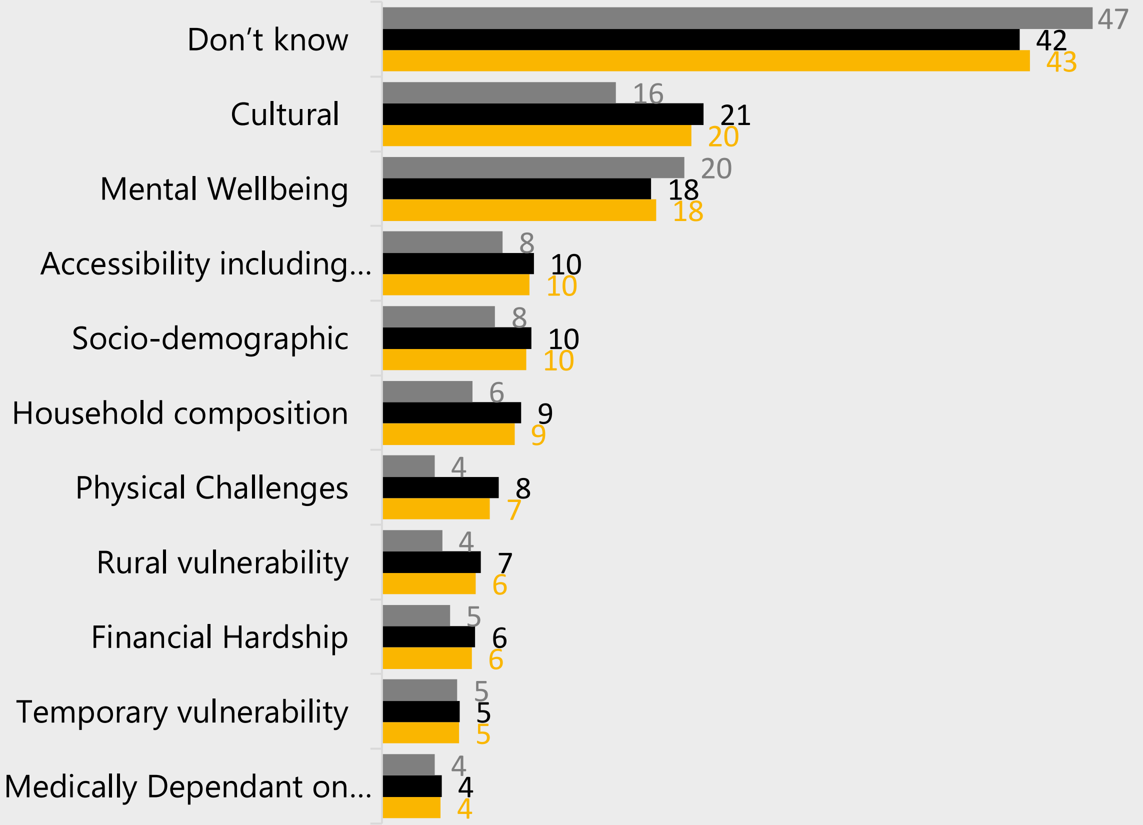
QUESTION ADDED IN WAVE 5

Total
Domestic
Business

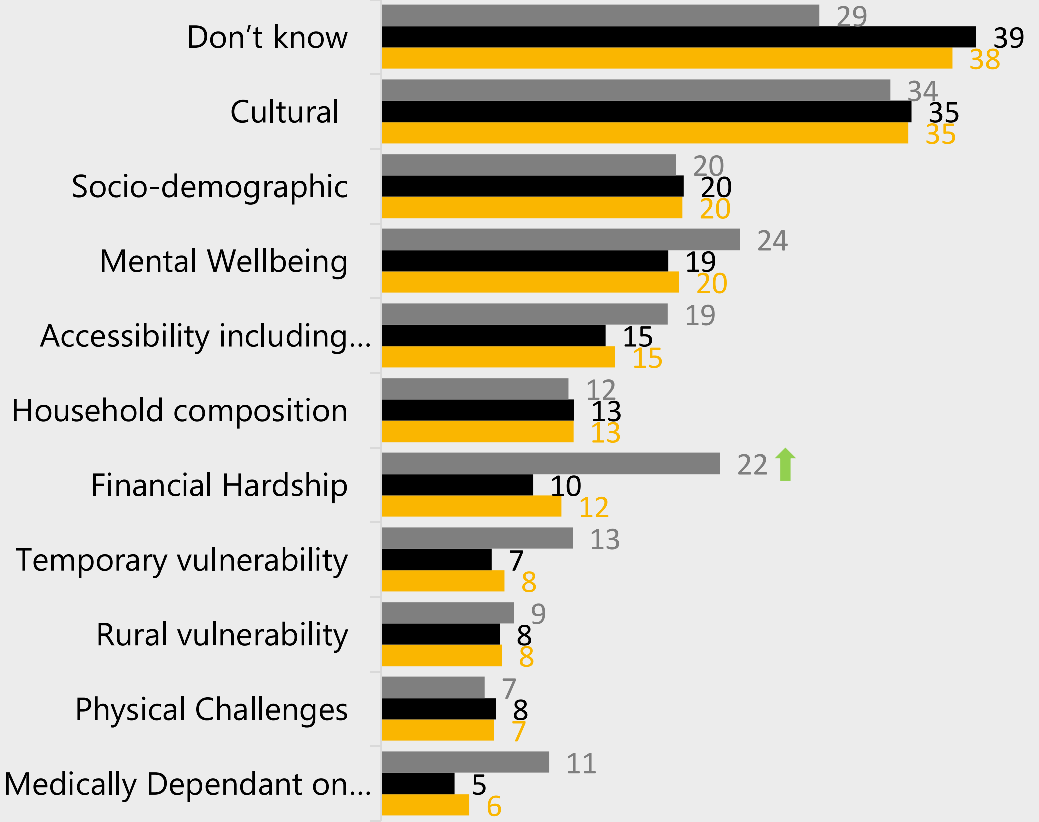
While many are unsure, cultural groups are the main group NGN is viewed as **not** best placed to support. This is followed by socio-demographic and mental wellbeing groups.

Jan 25

% selecting



Jan/Feb 26



Q37. Of the 10 aspects of vulnerability, which, if any, do you feel that NGN are NOT best-placed to provide support with?
wave 5: 1,423, Domestic: 1,223, Business: 200, Wave 6: 1302, Domestic 1102, Business: 200. New question in wave 5

Significantly higher/lower

Vulnerability

Why NGN **NOT** best placed to support these categories

7

QUESTION ADDED IN WAVE 5

Customers believe NGN do not have the specialist skills required to provide cultural, socio-demographic or mental wellbeing support, and neither should they.

Cultural

- It's not their role
- How do they determine this?
- How can they prioritise this?
- It's quite difficult to identify them
- I don't think religion has any relevance to them
- It is not within their remit as a gas company and neither should it be

Socio-demographic

- I feel there are different support services available that are better equipped to deal with the individual needs of these groups
- Can't see it a relevant to this company
- I don't feel as though energy can help these aspects
- I'm struggling to think how the network could effectively assist with these kinds of challenges
- Because how would they know? And how does this affect them using energy
- NGN has no obligation to whatever type of gender anyone decides to identify as

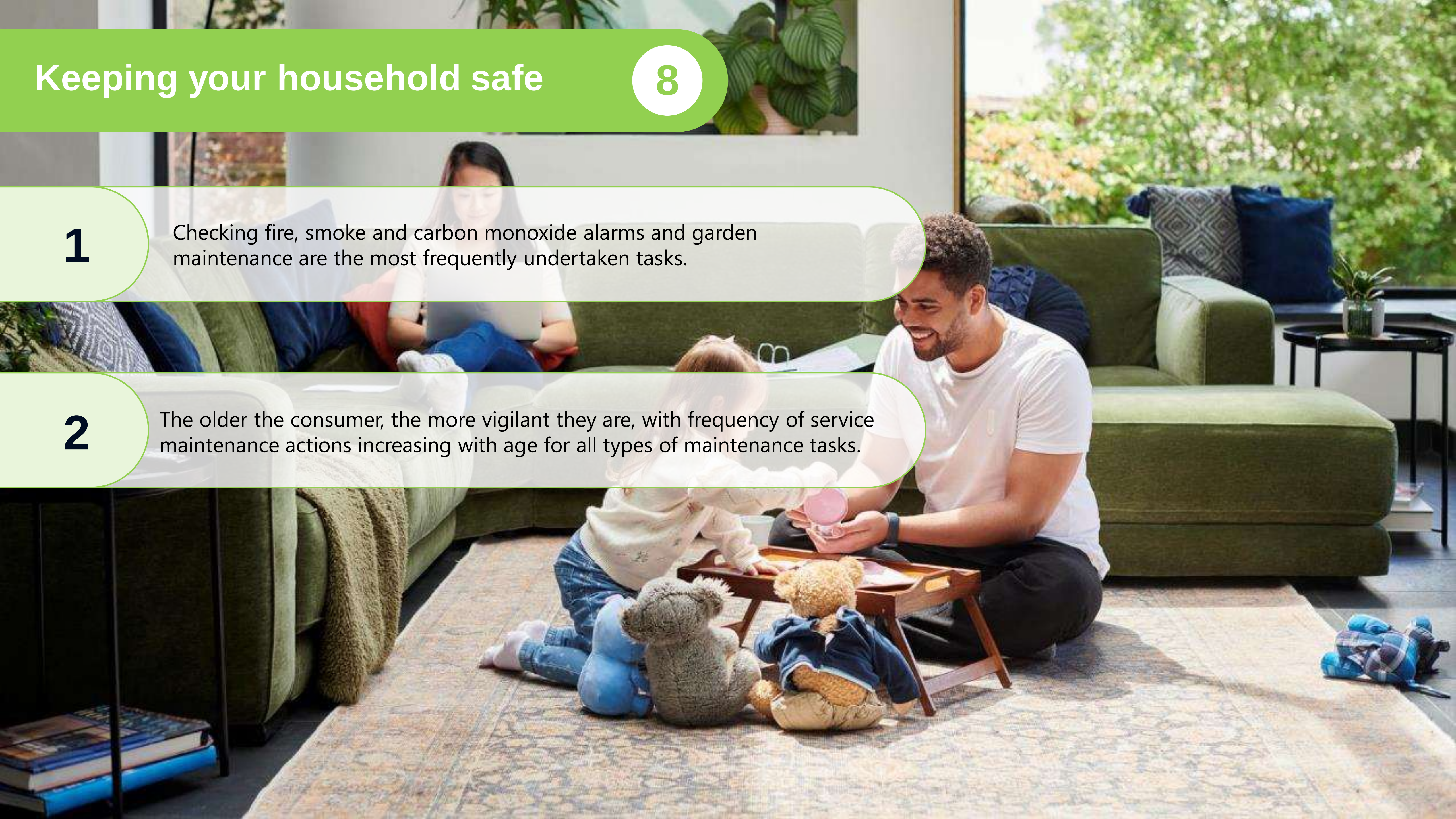
Mental wellbeing

- Can't help with personal matters such as mental illnesses
- In general people with mental health problems have support from professionals or can get this help
- Not within NGNs skill set
- They aren't mental health experts
- Not sure what gas supply can do for mental health
- Because it's hard to provide support when it comes to mental wellbeing
- Who is to say who has mental issues
- it shouldn't be any of their concern

Q38.. Why do you say this? Wave 6: 1302, Domestic 1102, Business: 200. New question in wave 5

Keeping your household safe

8



1 Checking fire, smoke and carbon monoxide alarms and garden maintenance are the most frequently undertaken tasks.

2 The older the consumer, the more vigilant they are, with frequency of service maintenance actions increasing with age for all types of maintenance tasks.

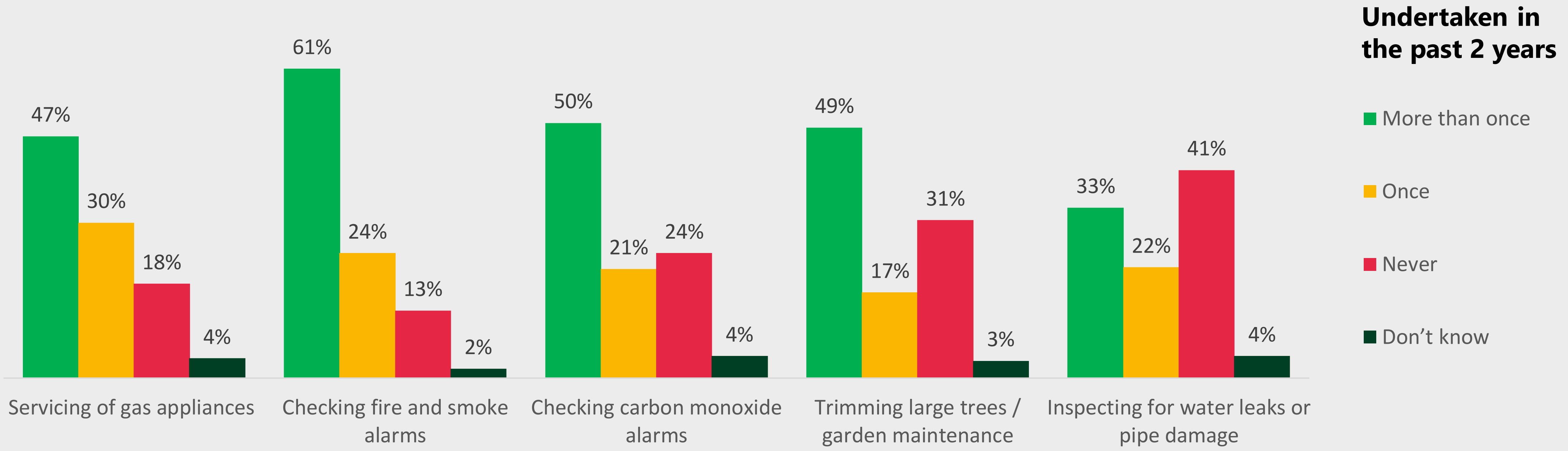
Keeping your household safe 8

Safety maintenance actions in past 2 years

QUESTION ADDED IN WAVE 5

Checking fire, smoke and carbon monoxide alarms and garden maintenance are the most frequently undertaken tasks. The only significant differences between wave 5 and 6 is that garden maintenance has increased.

Jan/Feb 26



Q40. In the past two years, how often have you undertaken the following maintenance tasks? wave 6: 651. Question wording was amended for wave 5

Keeping your household safe 8

Safety maintenance actions in past 2 years

QUESTION ADDED IN WAVE 5

The only significant differences between wave 5 and 6 is that garden maintenance has increased.

Maintenance tasks undertaken more than once in past 2 years

Task	Jan 25	Jan/Feb 26
Servicing of gas appliances	41%	47%
Checking fire and smoke alarms	55%	61%
Checking carbon monoxide alarms	43%	50%
Trimming large trees / garden maintenance	35%	49% ↑
Inspecting for water leaks or pipe damage	30%	33%

Q40. In the past two years, how often have you undertaken the following maintenance tasks? wave 5: 709, Domestic: 615. Weighted base; wave 6: 651
Question wording was amended for wave 5

↑↓ Significantly higher/lower

Keeping your household safe 8

Safety maintenance actions – by subgroup

QUESTION ADDED IN WAVE 5

Frequency of service maintenance actions increases with age for all types of maintenance tasks.

Age – Jan 25 Domestic

	Age			
	18-29	30-49	50-69	70+
Servicing of gas appliances	25% ↓	43%	56% ↑	60% ↑
Checking fire and smoke alarms	44% ↓	57%	68% ↑	68% ↑
Checking carbon monoxide alarms	27% ↓	45%	57% ↑	63% ↑
Trimming large trees / garden maintenance	22% ↓	47% ↑	57% ↑	60% ↑
Inspecting for water leaks or pipe damage	20% ↓	38% ↑	33%	38% ↑

PSR Eligible – Jan 25 Domestic

	PSR Eligible	
	No	Yes
Servicing of gas appliances	44%	49%
Checking fire and smoke alarms	55%	64%
Checking carbon monoxide alarms	44%	54%
Trimming large trees / garden maintenance	52%	46%
Inspecting for water leaks or pipe damage	31%	33%

SEG – Jan 25 Domestic

	SEG			
	AB	C1	C2	DE
Servicing of gas appliances	51%	43%	50%	49%
Checking fire and smoke alarms	61%	60%	61%	59%
Checking carbon monoxide alarms	44%	53%	47%	50%
Trimming large trees / garden maintenance	53%	54%	49%	37% ↓
Inspecting for water leaks or pipe damage	35%	33%	30%	33%

Financially vulnerable– Jan 25 Domestic

	Digital status		Bills	
	Digitally disengaged	Online	Pay without difficulty	Constant struggle / fall behind
Servicing of gas appliances	49%	47%	50%	45%
Checking fire and smoke alarms	61%	60%	61%	60%
Checking carbon monoxide alarms	55%	49%	50%	50%
Trimming large trees / garden maintenance	33% ↓	50%	55%	41%
Inspecting for water leaks or pipe damage	35%	32%	37%	28%

% undertaken more than once in past 2 years

Q40. In the past two years, how often have you undertaken the following maintenance tasks? wave 6: Domestic: 551. Question wording was amended for wave 5

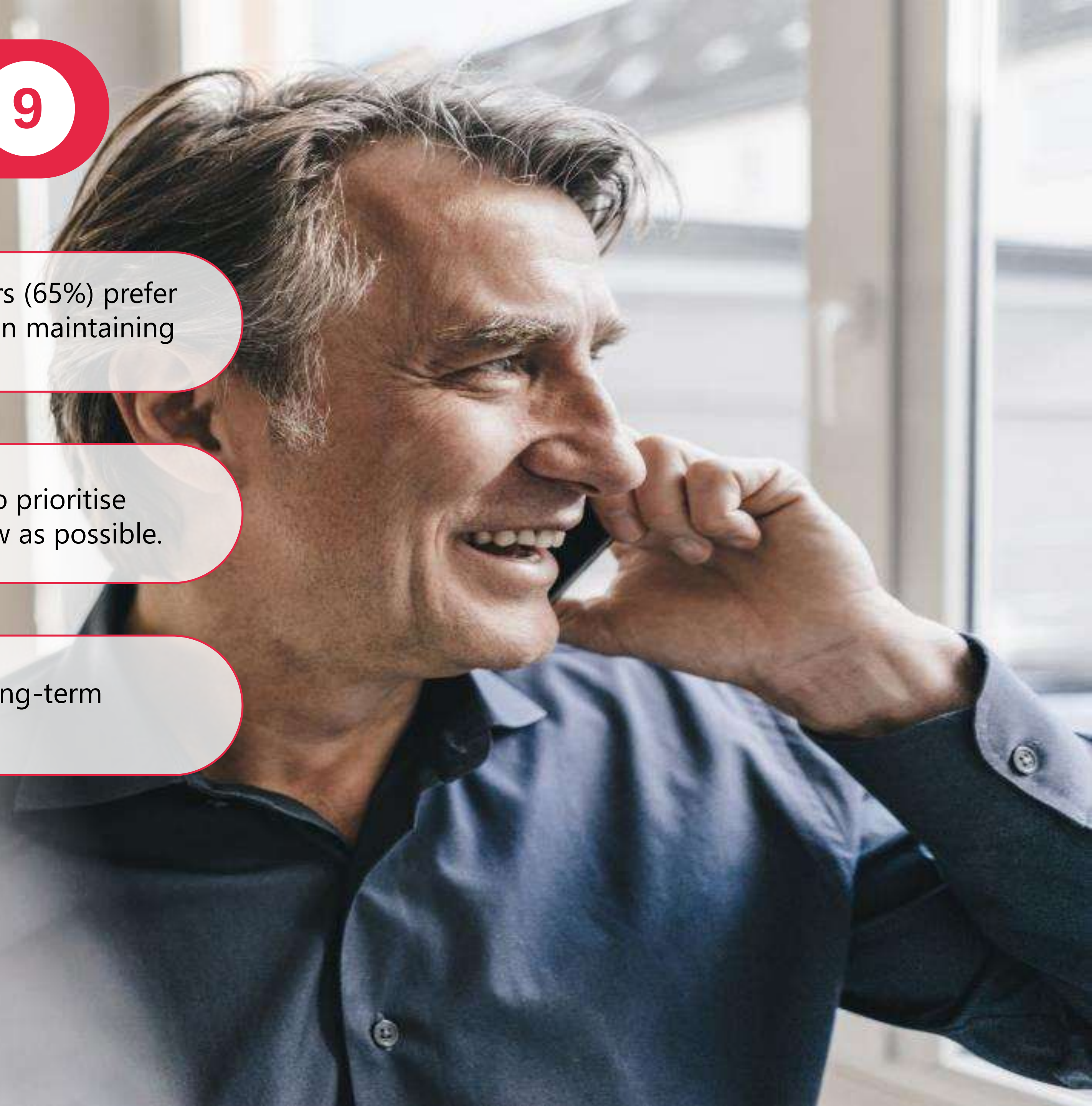
↑↓ Significantly higher/lower

Resilience

1. The majority of domestic (64%) and business customers (65%) 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 to keep bills as low as possible.

3. Older customers (50+) tend to be less supportive of long-term resilience investments.



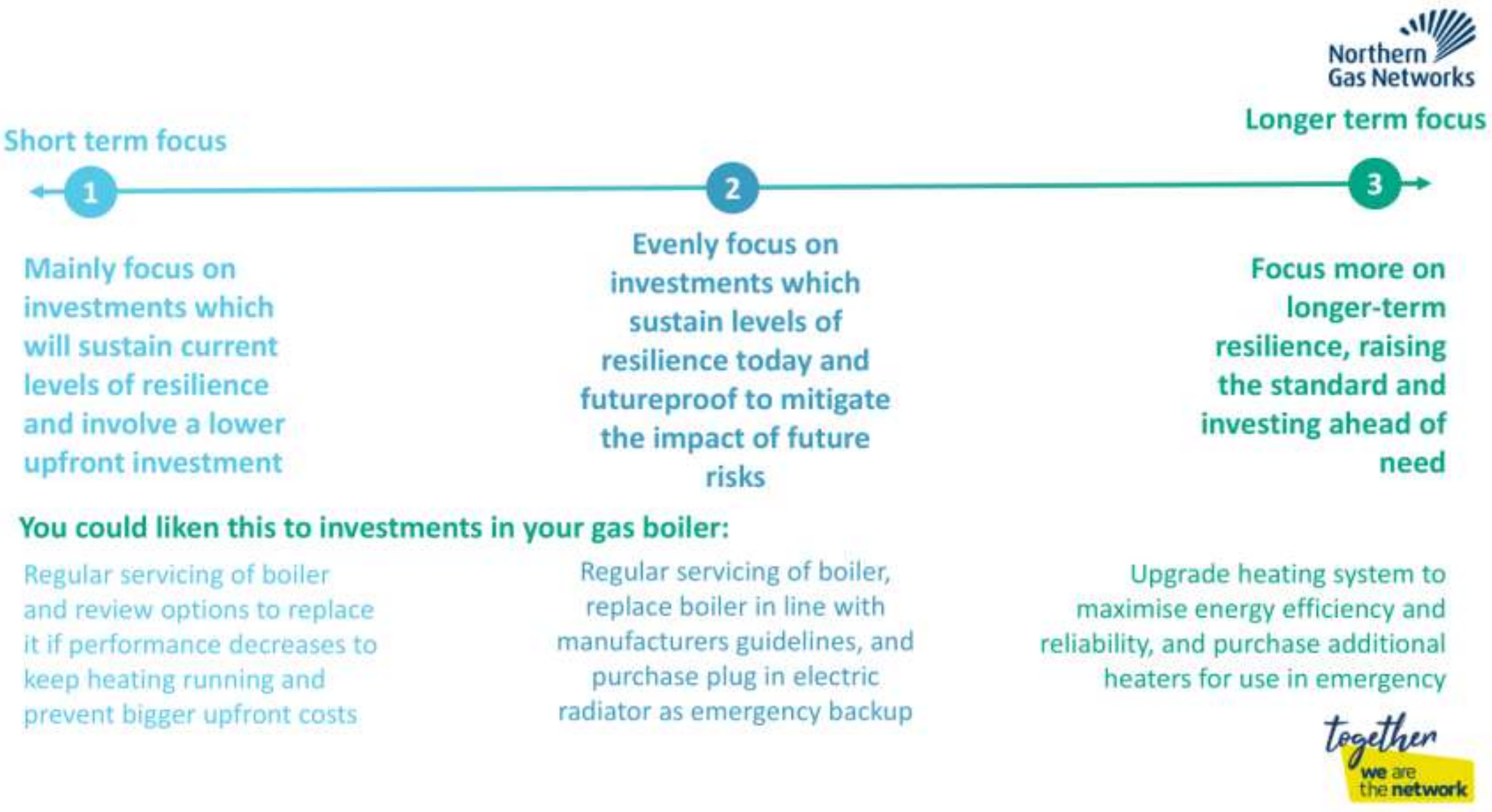
Resilience

Balancing resilience and investment

9

QUESTION ADDED IN WAVE 5

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



Resilience

Balancing resilience and investment – by business / domestic

9

QUESTION ADDED IN WAVE 5

Total | Domestic | Business

Customers would prefer that investments are evenly focussed on maintaining resilience for today and future proofing. There are no significant differences between domestic and business customers on an overall level this wave.
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

	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	
	Jan 25	Jan/Feb 26	Jan 25	Jan/Feb 26	Jan 25	Jan/Feb 26
Total	21%	16%	58%	64%	22%	20%
Domestic	22%	17%	60% ↑	64%	18% ↓	20%
Business	15%	16%	46% ↓	65%	39% ↑	19%

Q41. Do you think NGN should...wave 5: 655, Domestic: 561, Business: 94; wave 6: 602, Domestic: 502, Business: 100

↑↓ Significantly higher/lower

Resilience

Balancing resilience and investment – by subgroup

9

QUESTION ADDED IN WAVE 5

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	12% ↓	15%	16%	25% ↑
Evenly focus on investments which maintain levels of resilience today and futureproof to mitigate the impact of future risks	63%	62%	69%	56%
Focus more on **longer-term** resilience, raising the standard and investing ahead of need	25% ↑	23%	15% ↓	19%

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	13%	20%
Evenly focus on investments which maintain levels of resilience today and futureproof to mitigate the impact of future risks	66%	63%
Focus more on **longer-term** resilience, raising the standard and investing ahead of need	21%	17%

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	14%	16%	21% ↑	18%
Evenly focus on investments which maintain levels of resilience today and futureproof to mitigate the impact of future risks	58%	64%	67%	65%
Focus more on **longer-term** resilience, raising the standard and investing ahead of need	28% ↑	20%	12% ↓	17%

Financially vulnerable– Jan 25 Domestic

	Bills	
	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	13% ↓	22% ↑
Evenly focus on investments which maintain levels of resilience today and futureproof to mitigate the impact of future risks	66%	60%
Focus more on **longer-term** resilience, raising the standard and investing ahead of need	21%	18%

Q41. Do you think NGN should...wave 5 Domestic: 561; wave 6: Domestic: 502

↑↓ Significantly higher/lower

Resilience

Balancing resilience and investment – by subgroup

9

QUESTION ADDED IN WAVE 5

There are no significant differences for businesses on where investment should be focused for NGN.

Size of business – Jan/Feb 26 Business

	Size of Business	
	1 – 99 employees	100+ employees
Mainly focus on investments which will **maintain current levels** of resilience and keep bills as low as possible now	19%	14%
Evenly focus on investments which maintain levels of resilience today and futureproof to mitigate the impact of future risks	65%	65%
Focus more on **longer-term** resilience, raising the standard and investing ahead of need	16%	20%

Ability to pay for bills – Jan/Feb 26 Business

	Bills	
	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	13%	18%
Evenly focus on investments which maintain levels of resilience today and futureproof to mitigate the impact of future risks	67%	64%
Focus more on **longer-term** resilience, raising the standard and investing ahead of need	20%	18%

Q41. Do you think NGN should...
Weighted based; Wave 6: Business: 100, 1-99 employees: 31, 100+ employees: 69; Pay without difficulty: 60, Constant struggle / fall behind: 39
Note: size of business subgroups have been reduced for this question as only half the business sample was asked the question

Significantly higher/lower

Exec summary recap

10

Key takeaways (1 of 2)

create clarity

1

Cost-of-living pressures continue to shape customer behaviour:
The cost-of-living crisis continues to significantly impact customers.
Nearly half of domestic customers struggle to pay their bills at least from time to time and 58% self-ration energy (higher among those financially vulnerable or PSR-eligible).

2

Cost, reliability and safety remain consistent core priorities:
Unsurprisingly, keeping bills as low as possible continues to be a key priority. Equally important this wave, however, are providing a reliable, resilient supply and a safe service. Future customers (and feedback from the YIC) place a stronger priority on providing help for those who need it most and supporting the region to achieve net zero (after affordability and safety).

3

Education changes the priority balance:
The top three priorities take 77% of uninformed votes but this falls to 69% when informed, showing that education helps customers recognise the role of lower-ranked areas (e.g., net zero, digitalisation, collaboration). 42% think their priorities for NGN will change in the next five years due to rising energy costs, changes in personal circumstances, government policy and technological change.

4

Awareness and trust:
Awareness of NGN is lower this wave, for both domestic and business customers. This may partly reflect reduced communications around hydrogen. Customers seek trust in NGN via a perception of safety, good reputation and value for money. This should be backed up by great customer support, engagement with net zero, transparency, and fairness in decision-making.

5

Energy transition challenges:
Sustainability commitments are linked with cost. Future heating technologies like heat pumps are a cost barrier to many. Net zero is unfamiliar territory for most: something they have heard of but don't know that much about. Many customers are aware that heating systems will change but lack detailed knowledge, especially domestic, PSR-eligible and financially vulnerable.

Key takeaways (2 of 2)

create clarity

6

Customers want NGN to lead on transition information:
More than two-thirds of customers are interested in receiving net zero information, provided it is easy to understand. A similar proportion believe NGN should offer net zero advice to all adults. Customers want simple, practical net zero information covering energy-use reduction, grants/funding and new technologies.

7

Hydrogen/biomethane have strong acceptance for industrial use:
Two-thirds of customers find hydrogen and biomethane acceptable in commercial/industrial settings, with concerns continuing to fall. Businesses are particularly supportive.

8

Most customers want a say in local heating decisions:
Customers prefer local-level decision-making about heating changes and want the chance to influence plans.

9

Balancing resilience and future investments:
Nearly two thirds of customers support a balanced approach between maintaining current resilience and future-proofing. Customers facing financial difficulties are more likely to prioritise maintaining current resilience levels to keep bills low.

10

Customers feel it is important to provide support to those who need it:
Future customers place particular emphasis on helping those most in need and ensuring a fair transition to net zero. Customers believe NGN is best placed to support people with medical dependencies, those facing financial hardship, and those in rural areas, but not needs related to culture or mental health.

Our recommendations

1

Strengthen clear, transparent communication:
Emphasise NGN's commitment to customers, fairness in decision-making and transparency in business performance to build trust. Safety is a key driver of trust, so NGN's strong safety record should feature prominently. Communications should highlight customers top priorities (cost, reliability and safety) while explaining how lower-ranking areas contribute to these outcomes.

2

Prioritise support:
Continue to focus on energy-related vulnerabilities (medical dependency, financial hardship) where customers see NGN having the strongest role. Promote energy efficiency and affordable energy solutions

3

Educate on the energy transition:
Increase public understanding of low-carbon energy options by addressing the key concerns customers have around cost, reliability and safety. Provide clear, accessible explanations of available technologies and offer practical guidance on grants, funding and affordability to help overcome cost barriers.

4

Enhance local, place-based engagement:
Most customers want a say in heating system decisions and prefer local-level decision-making. Look to expand forums, local consultations and community touchpoints. Continue reinforcing hydrogen and biomethane as credible low-carbon options by building on strong acceptance for industrial/commercial use and highlighting their safety, reliability and environmental benefits.

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 to all customers.

Key summary

10

Awareness of NGN

66%	62%	67%	70%	76%	59%
Jan 21	Jan 22	Jan 23	Jan 24	Jan 25	Jan/Feb 26

Sig increase (Jan 25) | Sig decrease (Jan/Feb 26)

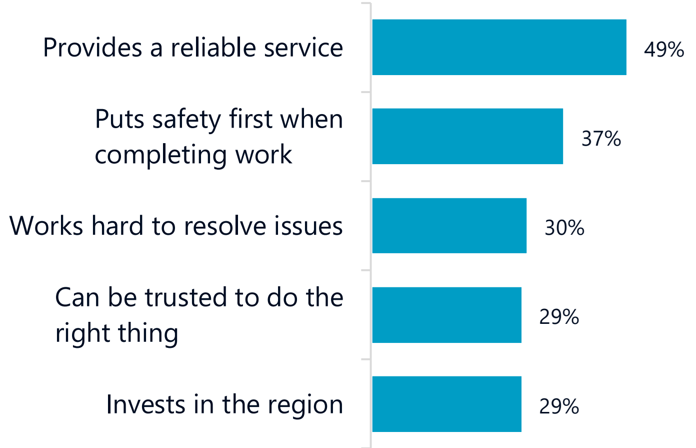
Difficulty paying bills

	Jan 21	Jan 22	Jan 23	Jan 24	Jan 25	Jan/Feb 26
Pay without difficulty	66%	53%	44%	49%	48%	54%
Pay with difficulty	33%	46%	55%	48%	50%	44%

Concerns about energy spend

	Jan 21	Jan 22	Jan 23	Jan 24	Jan 25	Jan/Feb 26
I am concerned about the amount of money we spend on energy	68%	85%	90%	88%	75%	75%

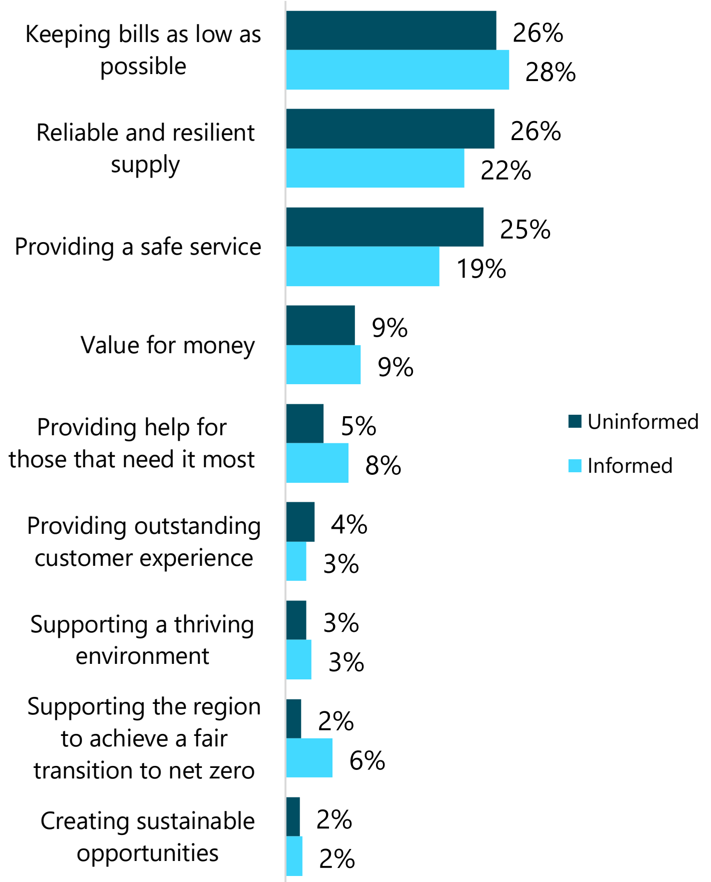
Brand Perception (Top 5)



Future Focus

Focus on investments which will maintain current levels for today	16%
Evenly focus on investments which maintain levels today and futureproof	64%
Focus on longer-term resilience for the future	20%

Priorities



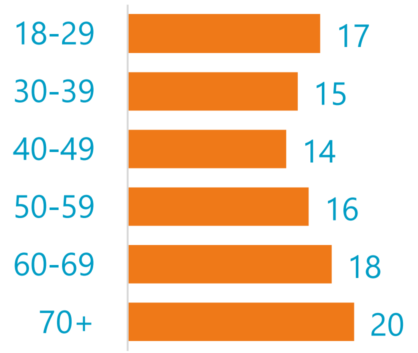
Q14 Had you previously heard of Northern Gas Networks?/ Q17 How much do you agree or disagree with the following statements? / C5 Which one of the following statements best describes your situation with paying your energy bill? Q16/Q42. Please rank the following from 1-9 (where 1 is the most important) 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 6: Total 1302, Domestic: 1102, Business: 200. Q41 Future focus base: 602

Appendix

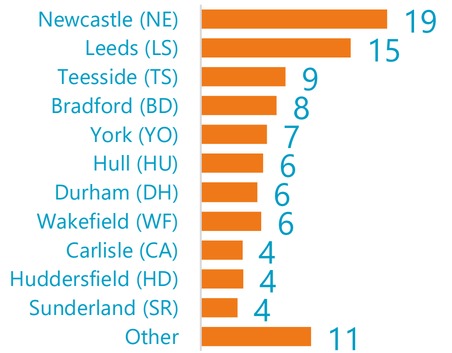
11

Domestic Customer Profile 10

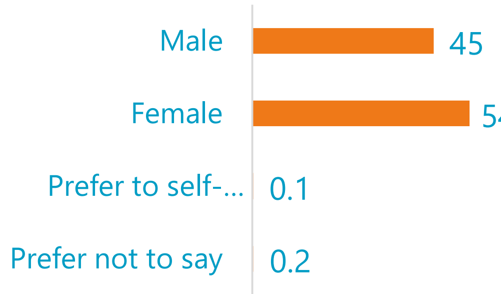
Age



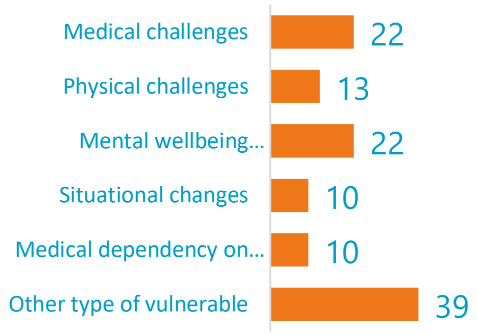
Postcode area



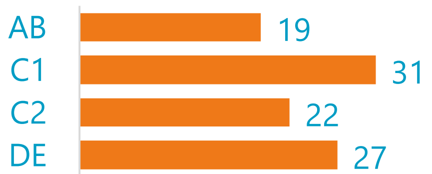
Gender



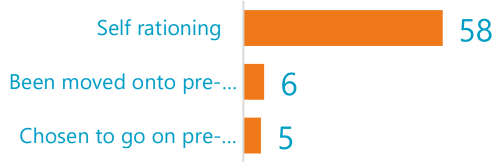
Vulnerability



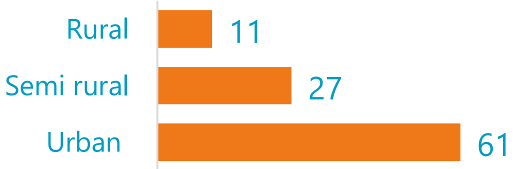
Social Grade



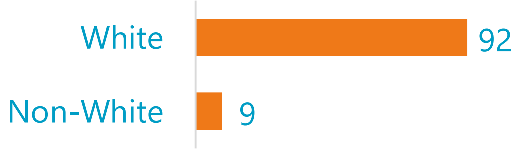
Energy use



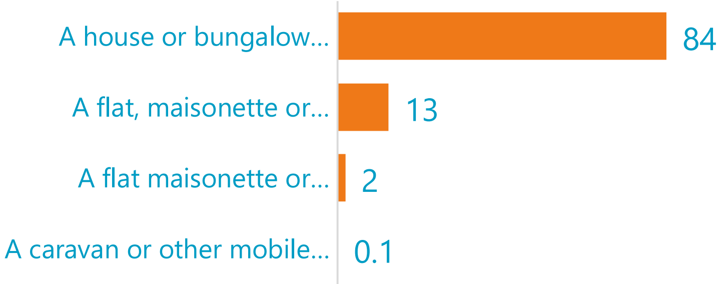
Location



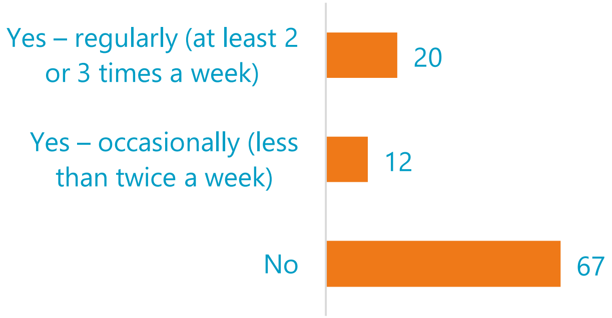
Ethnicity



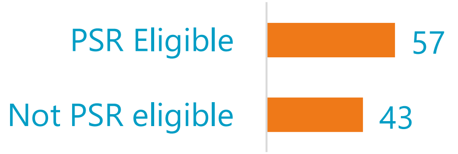
Accommodation



Work from home



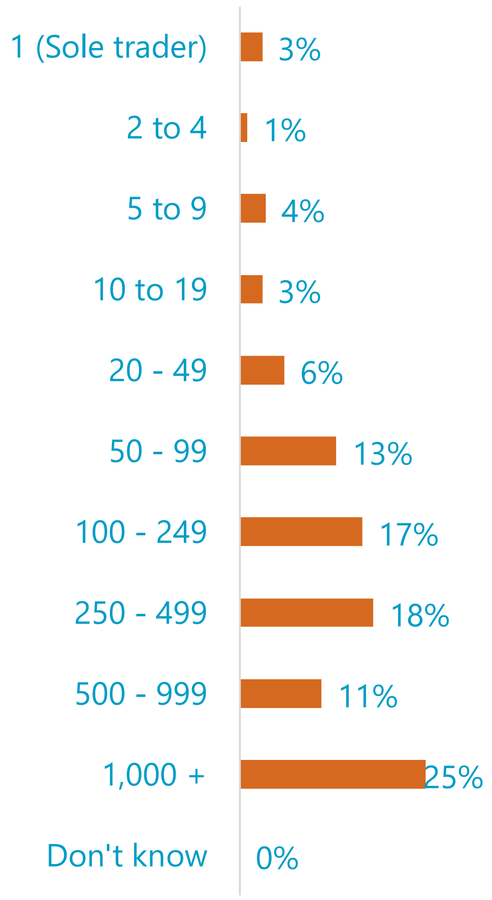
PSR Eligibility



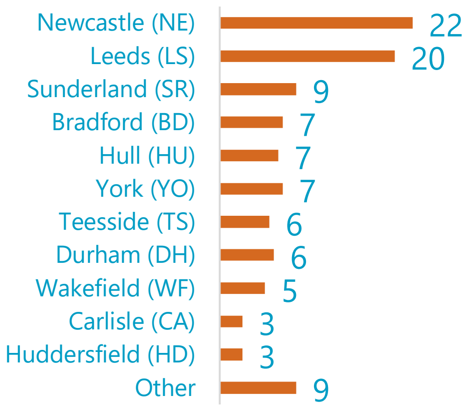
Weighted base wave 6: 1, Domestic: 1,102

Business Customer Profile 10

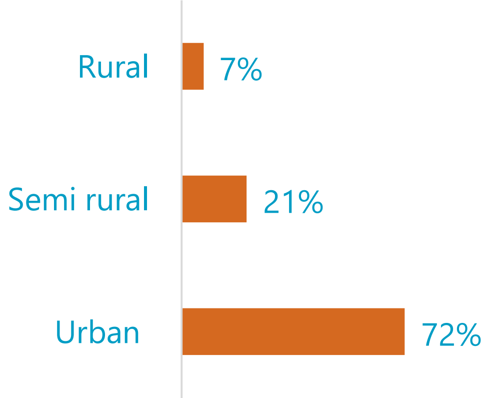
Business size



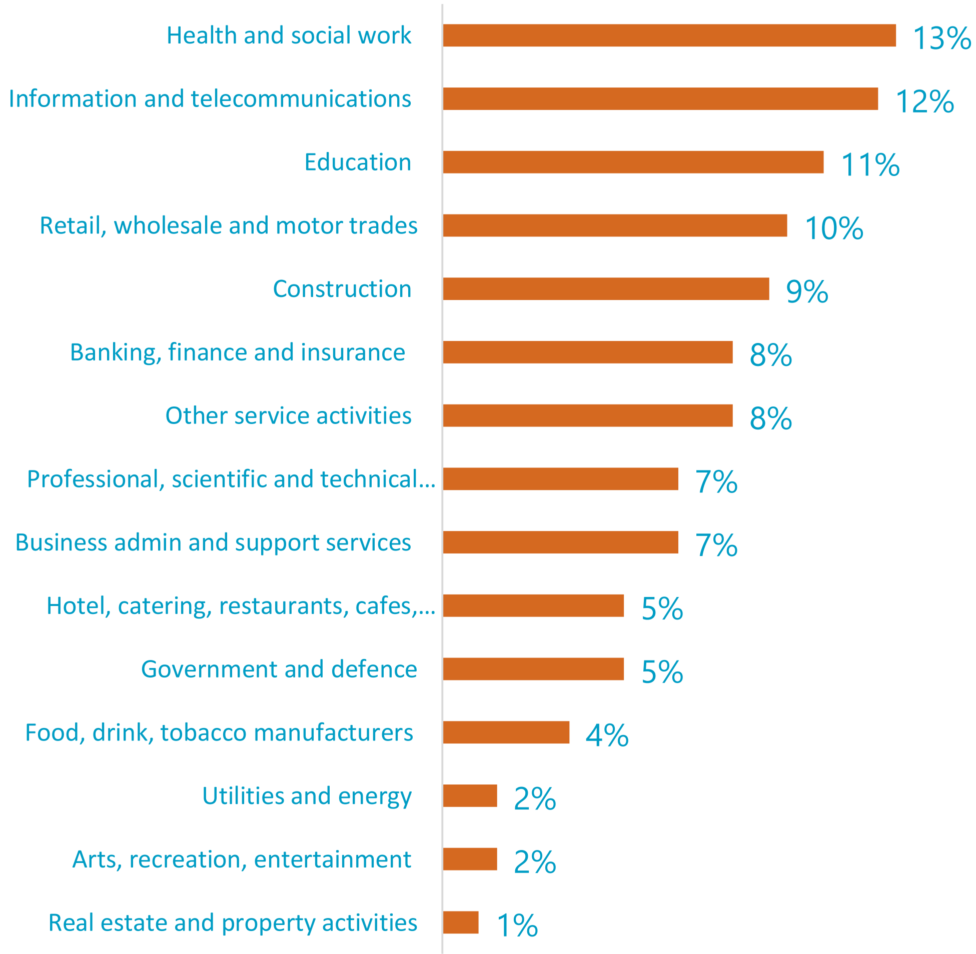
Postcode area



Location



Sector



Weighted base wave 6: Business: 200

Thank you

create clarity

LEADERS IN STAKEHOLDER ENGAGEMENT

Northern Gas Networks

Customer perception research

Northern Gas Networks

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March 2026