

Stakeholder Research Programme

Presentation of Findings

Research objectives and methodology

Customer Telephone Interviews

- 100 telephone interviews with customers across Wales and South West England
- Broad spread across age, gender, lifestage, working status etc.
- Structured questionnaire: c10 minute interview
- Sampled from consumer data listings – most respondents had had no prior contact with WWU
- Fieldwork conducted by Protel Fieldwork, a specialist telephone research fieldwork agency



Care & Repair Caseworker survey

- WWU prepared and distributed an online questionnaire to Care & Repair caseworkers
- The questionnaire focussed on caseworkers' clients, their needs and vulnerabilities and on key aspects of WWU's provision
- 31 responses were received by the survey's closing date
- Raw data was passed to Mindset for processing and analysis



Objectives:

- WWU: profile, awareness and understanding of role and scope
- WWU strategic priorities – what is important...
 - ? *...investing to keep gas flowing*
 - ? *...investing for a sustainable future*
 - ? *...supporting those most in need*
 - ? *...raising awareness of safety and energy efficiency*
- Customer service: expectations and standards
- WWU: perceptions of value for money



- Three consumer focus groups conducted...
 - ...in Bristol, Taunton and Swansea
 - 8 respondents in each
 - Discussions organised around a discussion guide prepared in advance
 - Respondents were recruited to broadly represent WWU's customer base...
 - ...wide range of ages and circumstances
 - A minority had had previous contact with WWU in some respect

Consumer Focus Groups



- 20 one-to-one, depth interviews with vulnerable customers
- Conducted in their homes (across South Wales and South West England)
- Wide range of needs and vulnerabilities represented across the sample
- Organised around a discussion guide prepared in advance

Vulnerable Customer Depths

Customer Telephone Survey

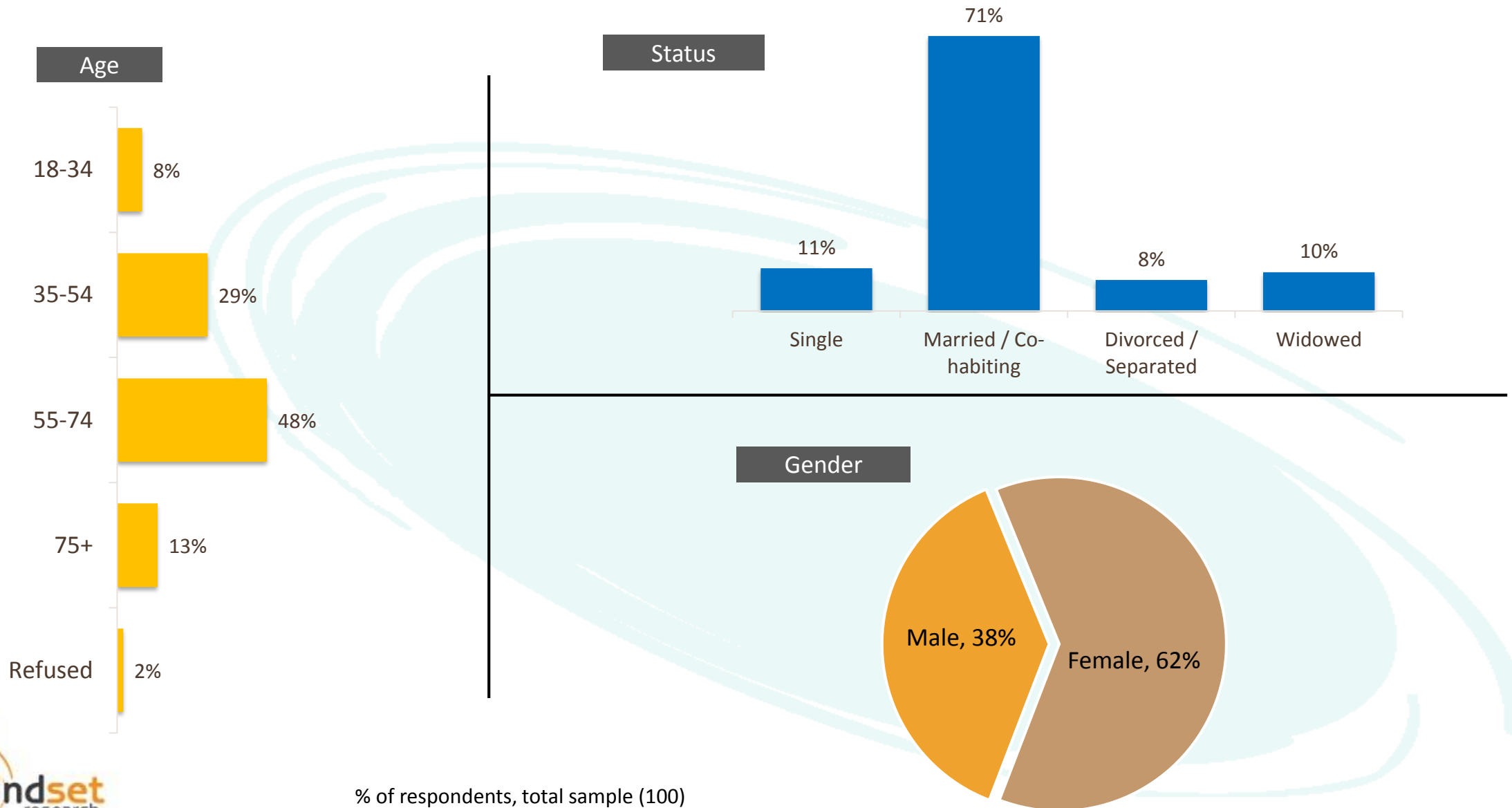


Customer Telephone Survey: Key Findings

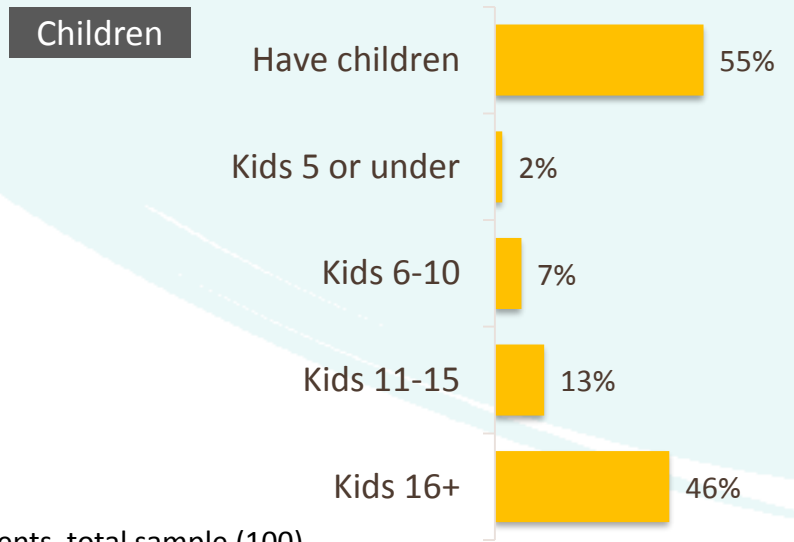
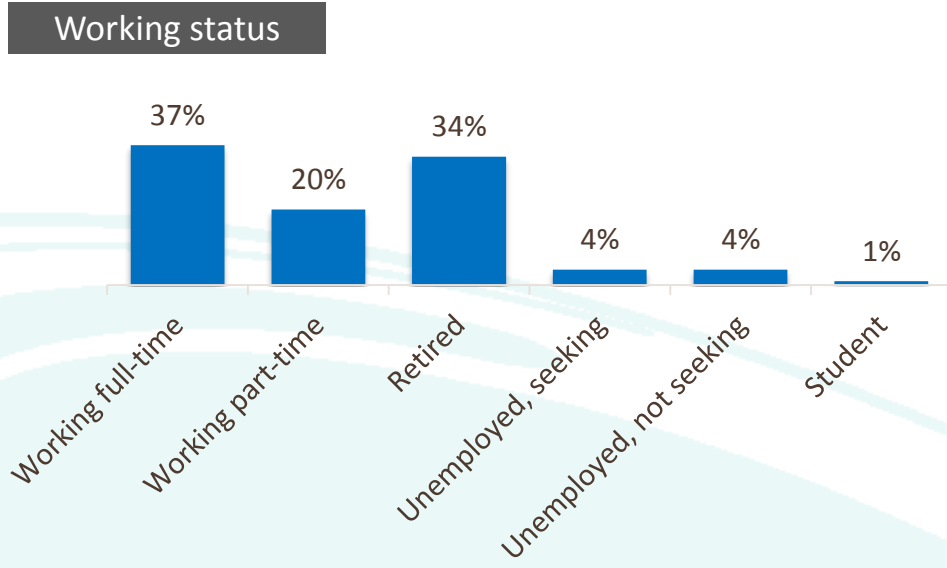
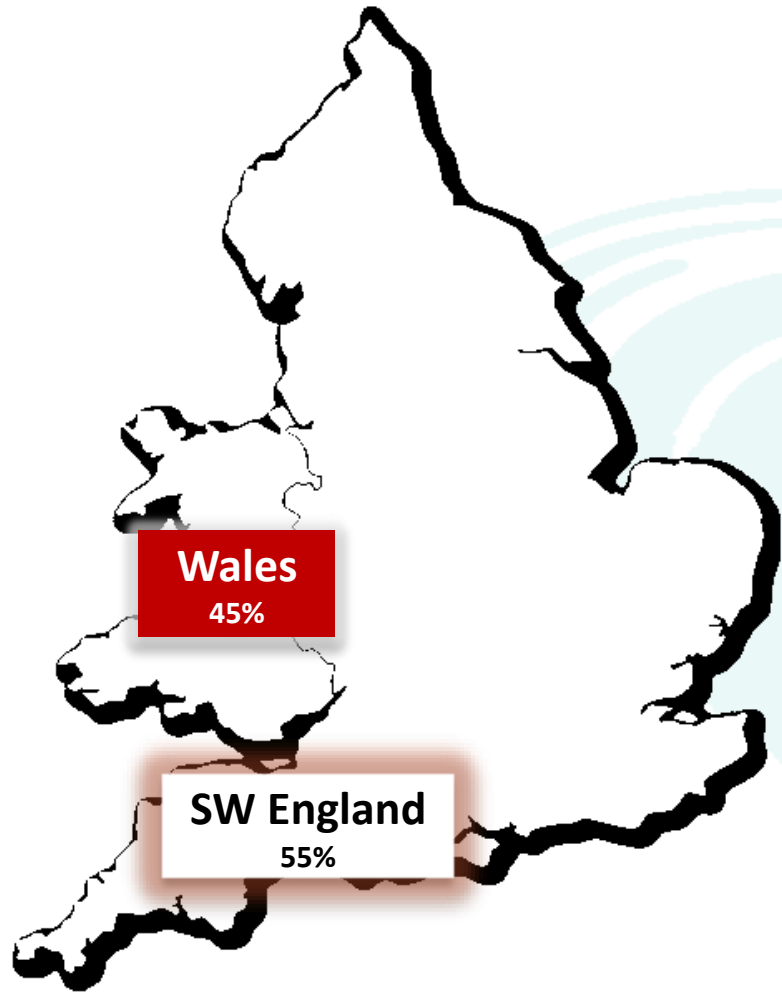


- WWU is unfamiliar to most: even when prompted, only 18% of respondents were aware that WWU is the GDN in their region
- A large majority (>90%) have had no direct contact with WWU
- Consequently, respondents struggled to talk about their impressions or perceptions of WWU
- Only eight respondents had experienced WWU operations directly and none of these expressed dissatisfaction
- Maintaining a safe, reliable gas supply is considered to be the number one priority (and in general, respondents tended to focus on the particular importance of safety in relation to gas)
- The other stated priorities are all considered important...and are difficult to separate in terms of relative importance
- The majority felt that a 40 minute response time to an emergency is “about right” (but, although based on a small sample, it was notable that those aged 75+ are much more likely to feel this is too slow)
- Over 70% of the sample believed the average cost to households for WWU services represents good (28%) or fair (43%) value for money

Sample profile 1



Sample profile 2



% of respondents, total sample (100)

- 87%** Of households connected to gas
- 11** Households in off-gas area
- 89%** Use gas for heating
- 62%** Use gas for cooking
- 7%** On PSR (respondent or member of household)
- 17%** Have disability or chronic illness (respondent or member of household)
- 11%** Consider themselves vulnerable (respondent or member of household)

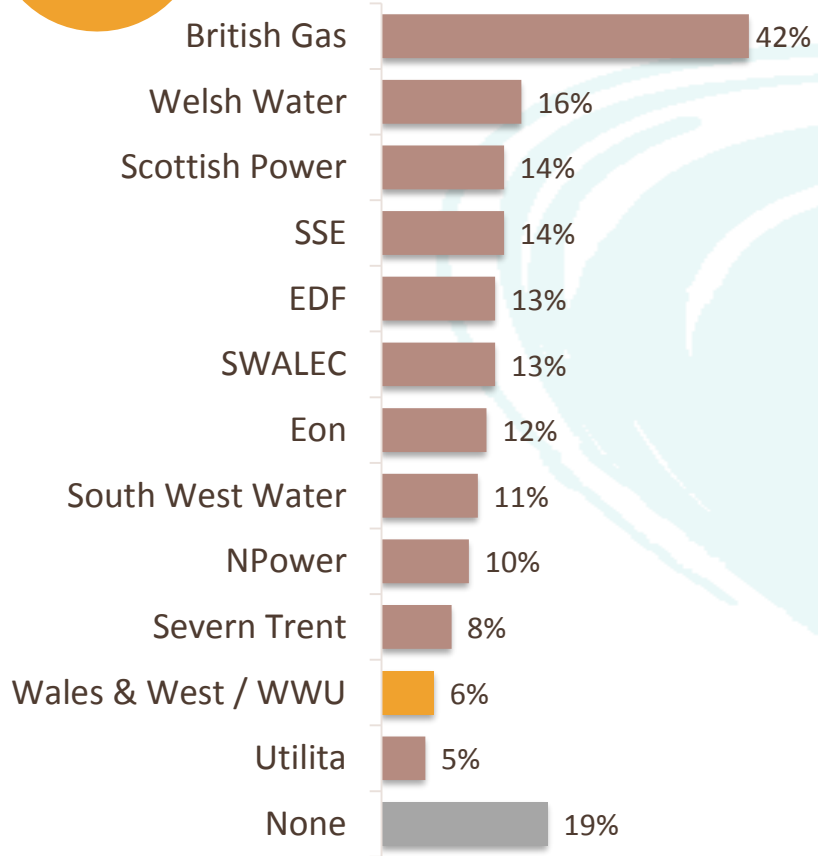


WWU: Awareness and Profile



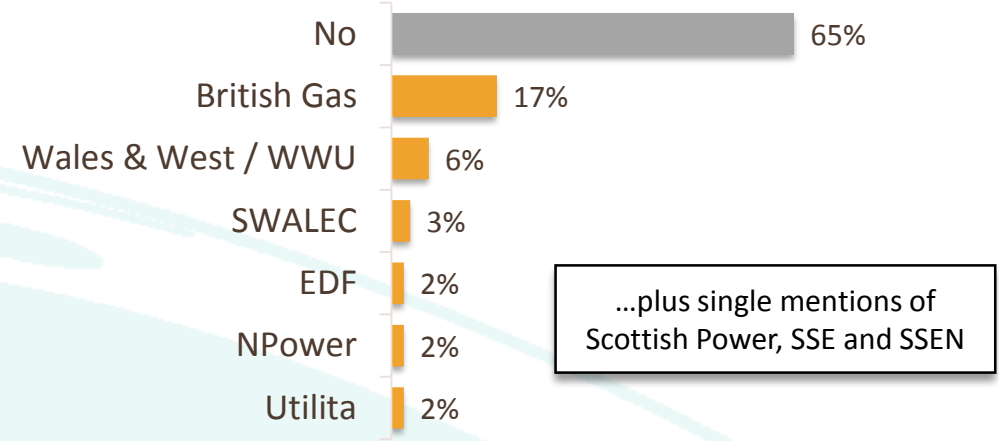
Any

Which utilities that operate in your region can you name?



Gas

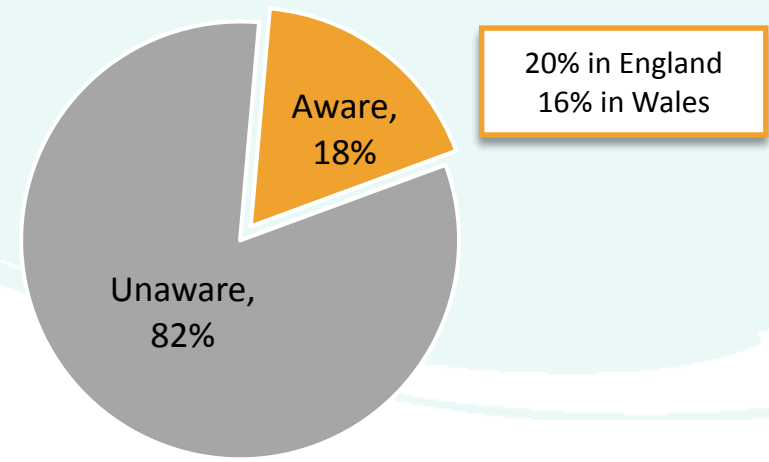
Do you know the name of the organisation responsible for the gas distribution network in your region?



...plus single mentions of Scottish Power, SSE and SSEN

Prompted

Did you know that Wales & West Utilities (WWU) is the gas distribution network in your region?



20% in England
16% in Wales

% of respondents, total sample (100)

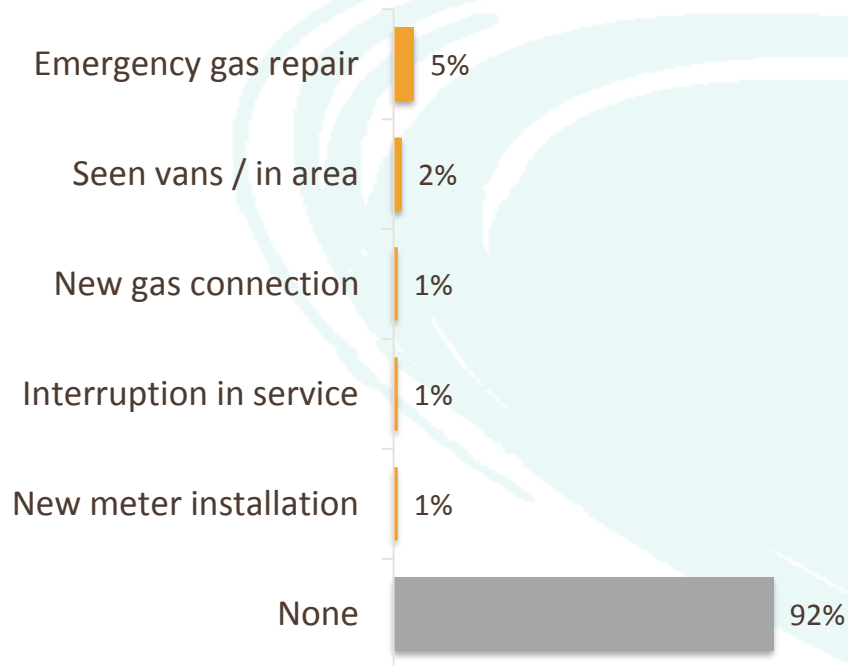


WWU: Engagement and contact



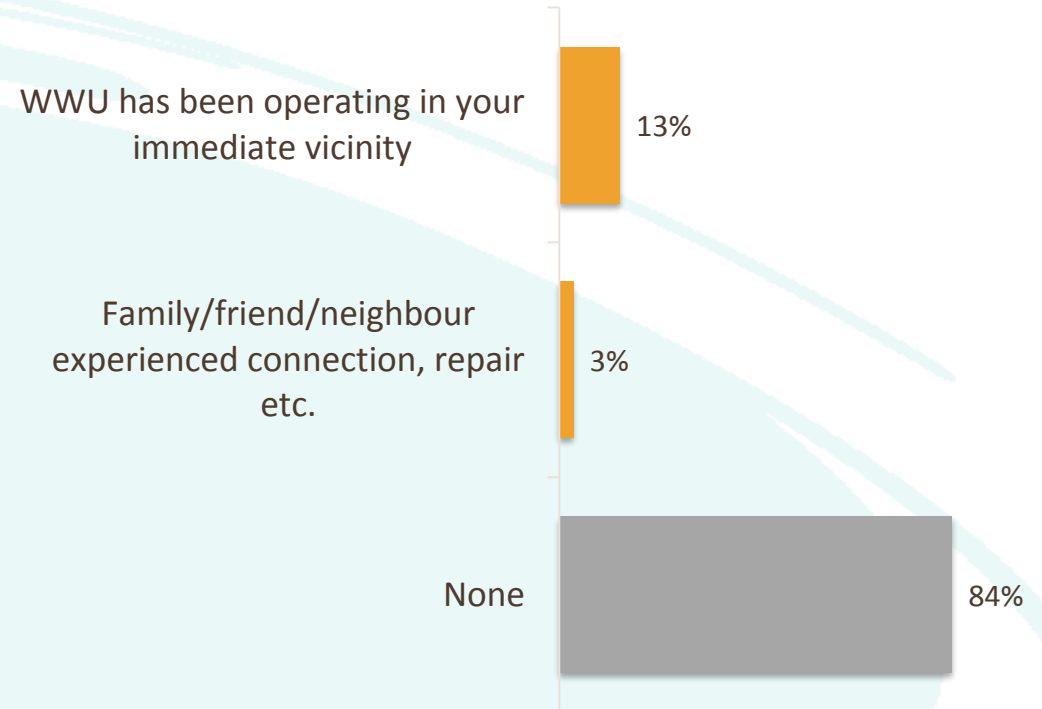
Direct

Have you had any direct contact with WWU in relation to...



Indirect

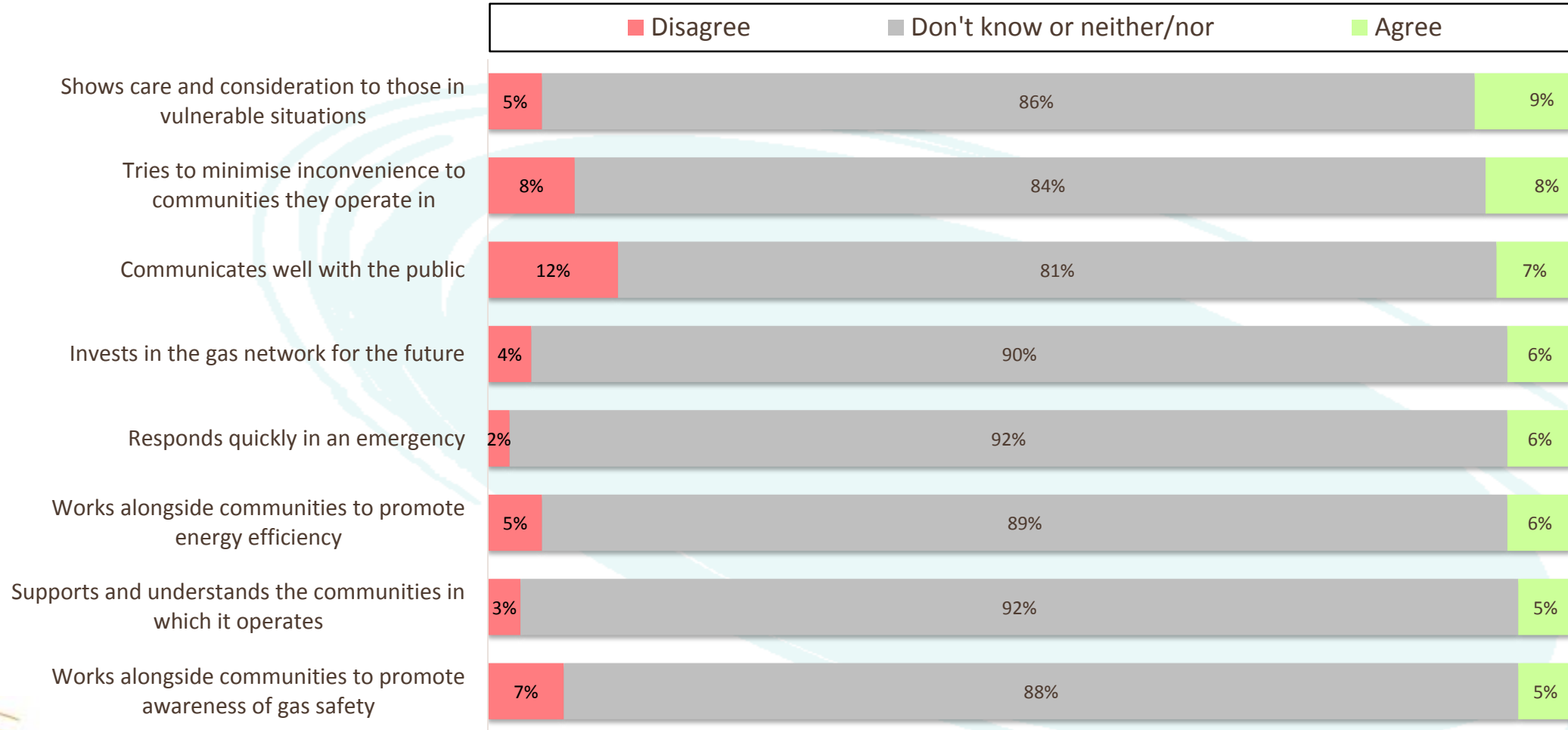
Have you had indirect contact with WWU in relation to...



WWU: Perceptions and impressions



Based on your experiences or your impressions of WWU, to what extent do you agree or disagree with...

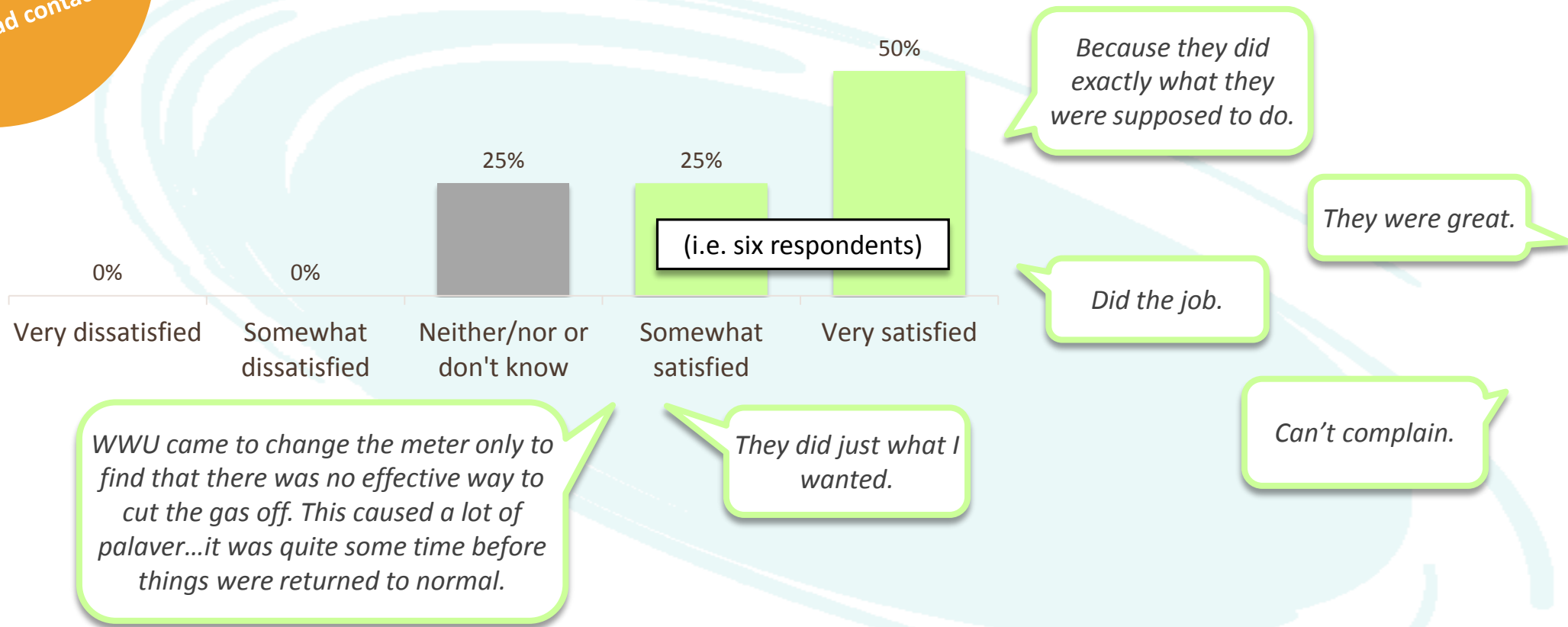


% of respondents, total sample (100)



CAUTION!!
Based only on the 8 respondents who have had contact

How satisfied have you been with WWU in relation to any contact you have had with them?



WWU: Strategic priorities



Please tell me how important each statement is to you by giving a score between 1 and 5...

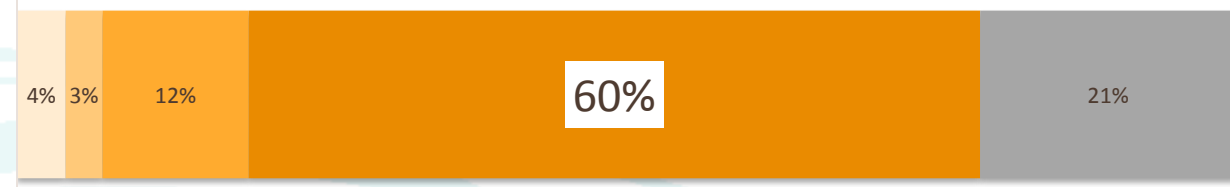
Not at all 2 3 4 Very important Don't know

Mean average score

Most important

Reliable supply

WWU want to keep you safe and warm in your home with a gas supply you can rely on. To do this WWU need to continue to invest in your gas network to keep the gas flowing safely even in the worst of weathers.

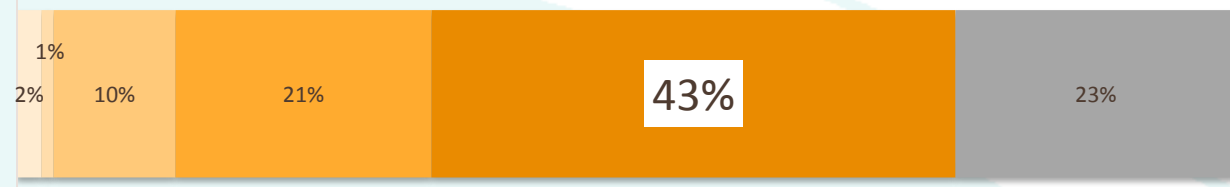


4.6

44%

Sustainable future

For a sustainable future, it's important WWU find greener ways to heat and power homes and businesses. Investment to develop new and innovative technologies is vital to meet your energy needs for today and tomorrow.

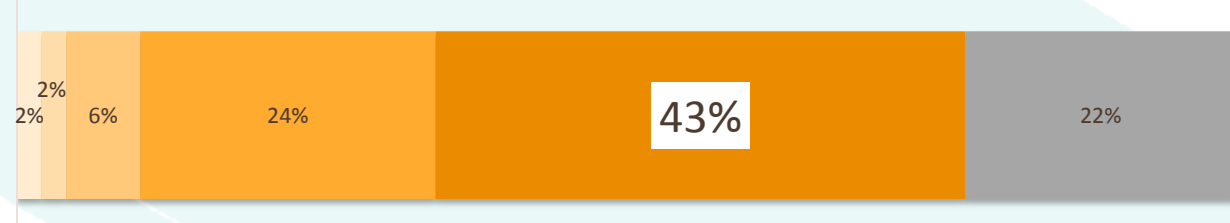


4.3

16%

Supporting the vulnerable

There are thousands of people across Wales and South West England that need extra support. WWU help them with low cost gas connections, financial support for appliance repairs and by prioritising them when things go wrong.

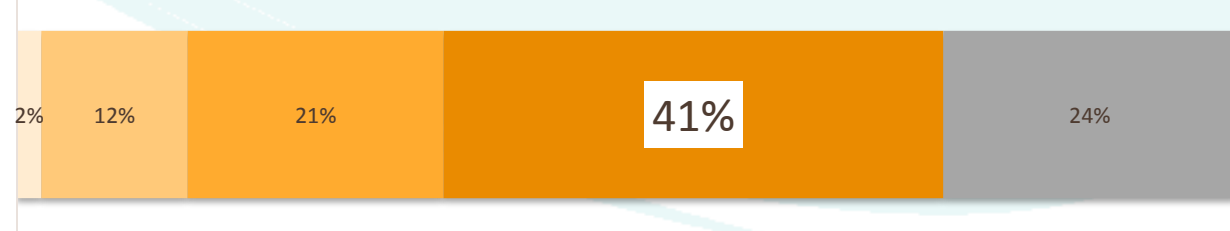


4.4

16%

Raising awareness

WWU serve a community of 7.5 million people and understand that their services often go further than the pipes in the ground that deliver gas. Working in partnership with community groups WWU raise awareness of vital gas safety and energy efficiency.



4.3

24%

% of respondents, total sample (100)



WWU: Other thoughts on priorities



Do you have any other thoughts about what the priorities for WWU should be?

We all have a place in the world and we all have to look out for each other.

It's important that people are safe in their homes especially if there is a gas problem.

...we need to look forward to a greener future which for me is very important.

To make the cost of energy affordable to those less well off.

Keeping the gas flowing is most important.

Don't know anything about WWU.

Because I feel the cold dreadfully and so very much rely on a constant gas supply.

Supporting community is about benefiting everybody not just one group.

Comments covered a range of themes...



You need the heating and to be warm and if you don't have heating illnesses start. My daughter has asthma and heating is necessary.

We must invest in the future for our children's sake.

I had not heard of them before today so it's essential that they embrace the local community with more vigour.

It's a very dangerous thing and needs to be safely used.

WWU: Customer service priorities



I would like you to think about WWU and its customer service. Please tell me how important each of the following is by giving a score between 1 and 5...

Not at all 2 3 4 Very important Don't know

Minimising interruptions

Comms

Resolving complaints

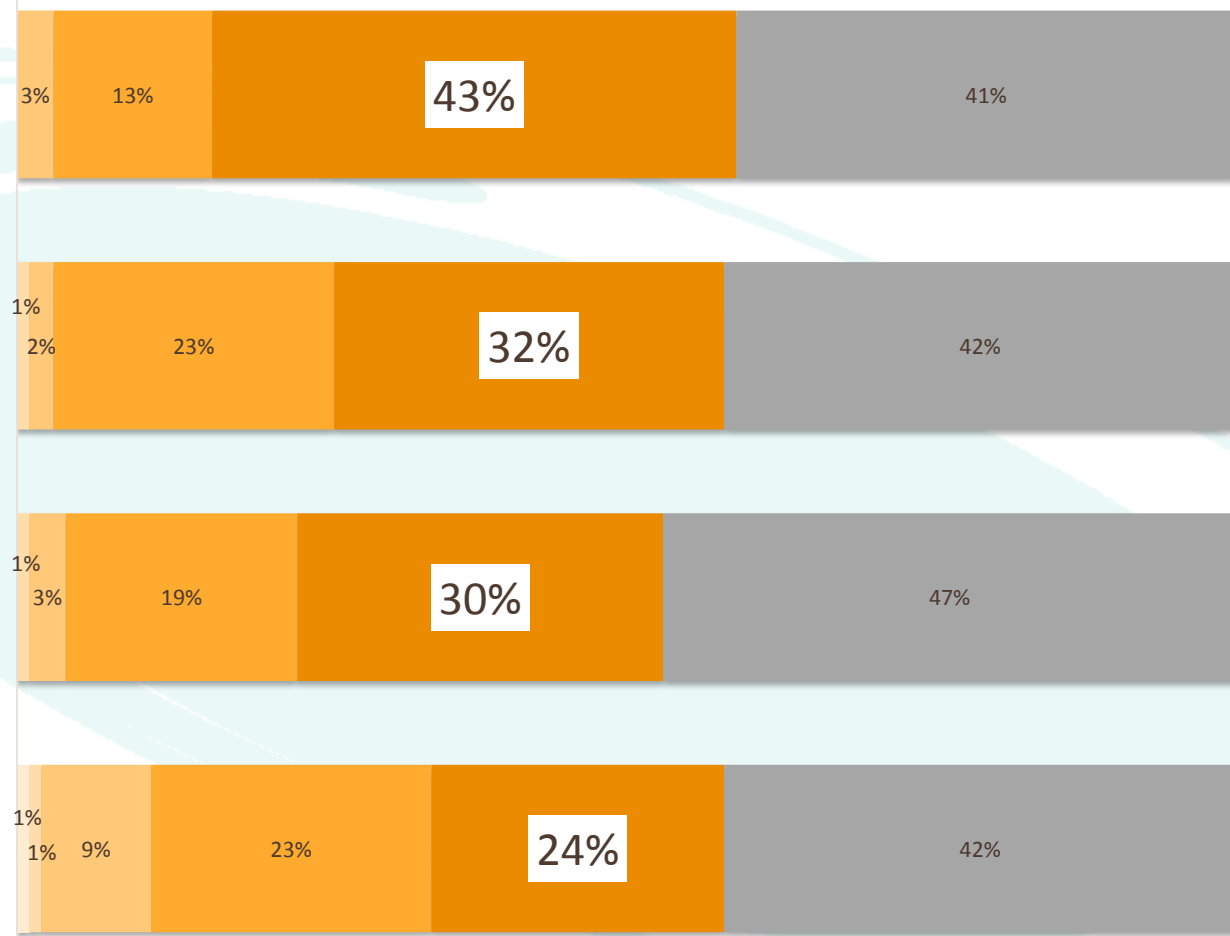
Tidy sites

Keeping interruptions to gas supplies to a minimum

Communicating effectively when our work impacts you

Resolving complaints quickly and compensate you fairly if things go wrong

Keeping the sites where we're working as tidy as possible



Mean average score

Most important

4.7

27%

4.5

18%

4.5

26%

4.2

28%

% of respondents, total sample (100)

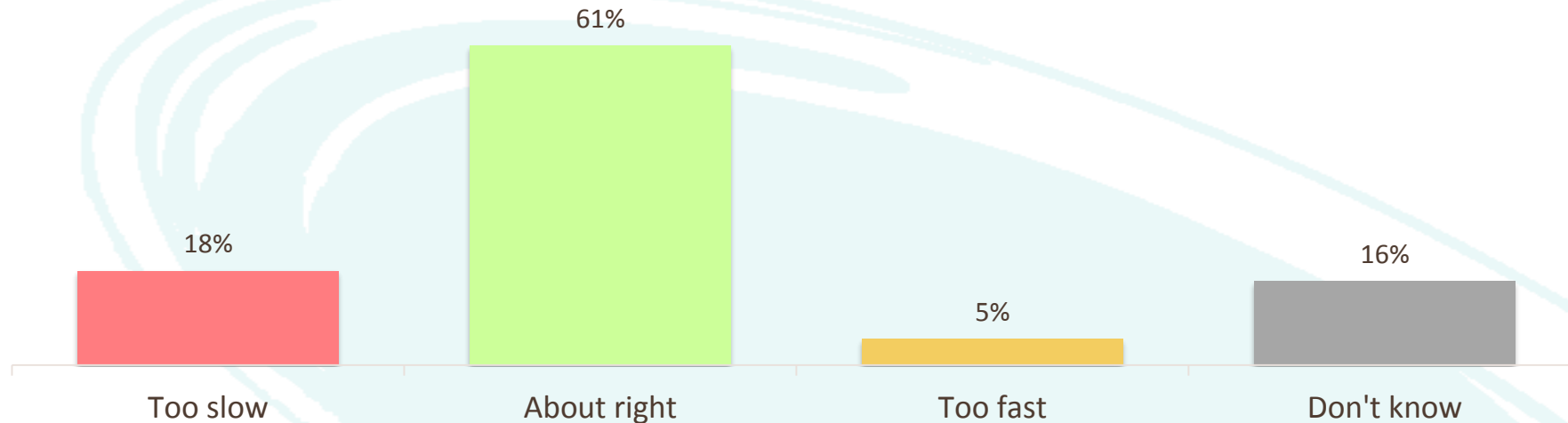


WWU: Responding to emergencies



WWU runs the gas emergency service for the communities they serve. That means if you smell gas or have a gas leak, WWU will be there to keep you safe. On average it takes WWU 40 minutes to respond to a gas emergency.

Do you think this is about right, too fast or too slow?



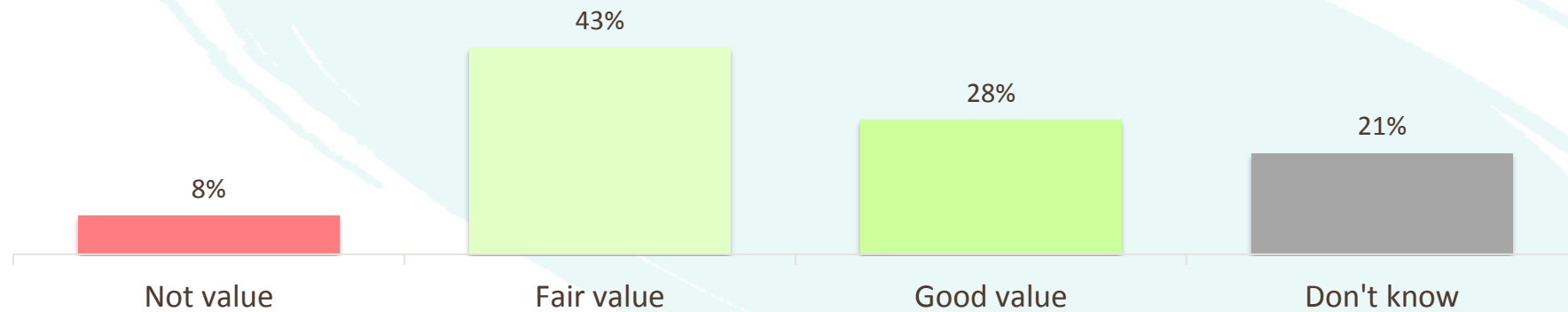
Aged 75+ **54%**
Aged <75 **13%**





WWU keep communities safe by responding to gas emergencies and keep them warm by upgrading their network to keep the gas flowing, whilst providing extra support for vulnerable customers. These services are paid for through your energy bill. The average annual gas bill is £630 and WWU charges make up 20% of this cost: £128 a year.

Do you think this is good value for money, fair value or not value?



Care & Repair Caseworker Survey



C&R Caseworker Survey: Key Findings



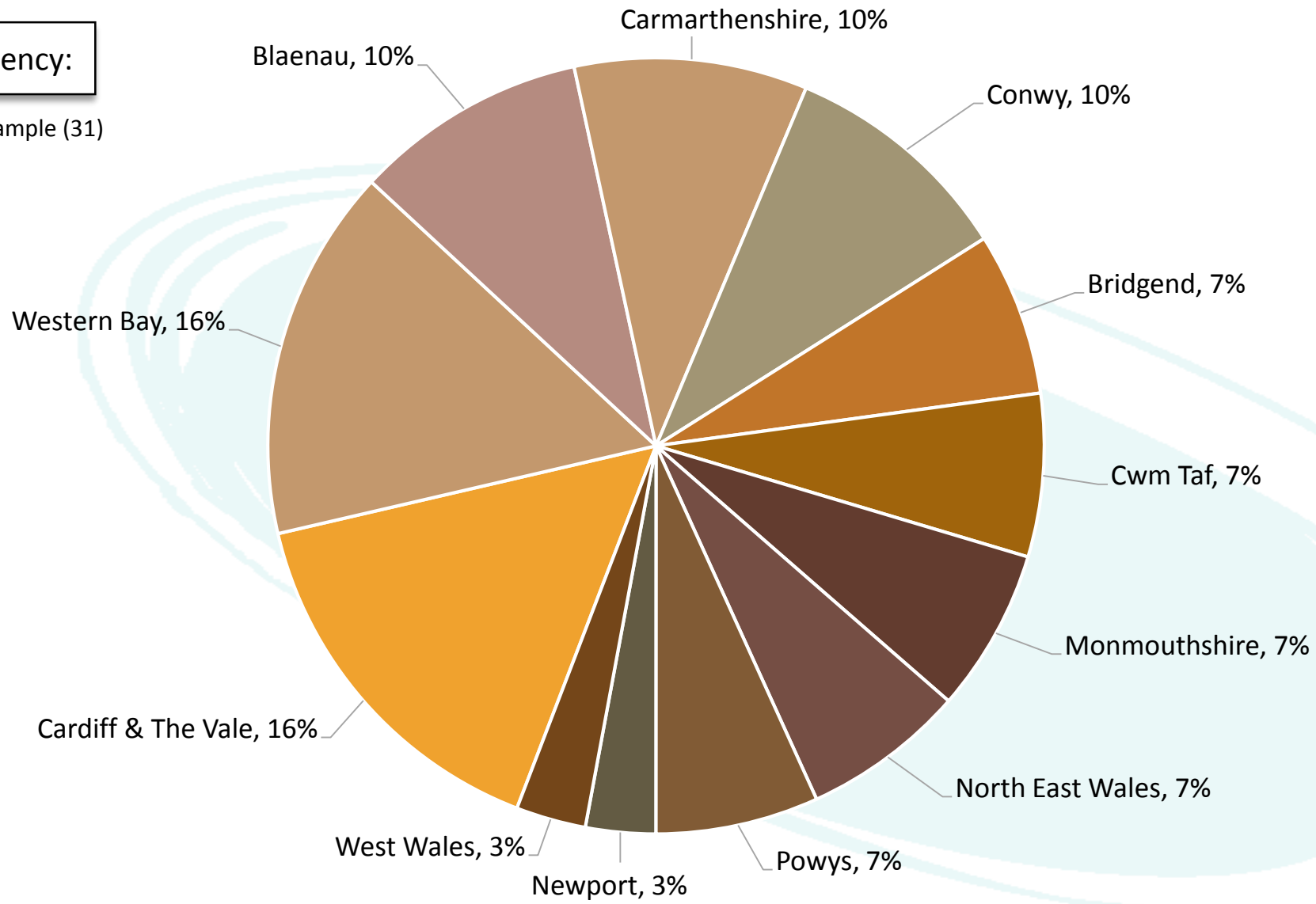
- Around 80% of caseworkers feel that their clients have difficulty in affording energy bills
- Almost 40% believe that some of their clients limit heating to only one or two rooms in order to save money
- Interruptions to the gas supply would have significant and immediate impacts to many clients: 58% of caseworkers suggested that this would cause 'real problems' within an hour
- The extent to which clients would be able to prepare varies considerably (e.g. 19% said "most would" but 29% said "few or none would")
- 84% felt that WWU's support measures and timings are appropriate...
- ...and many responses to the open question praise and endorse WWU's approach to supporting those most in need...
- ...but there were also comments urging more to be done to raise the profile of the support available to those most in need

Sample profile



Care & Repair Agency:

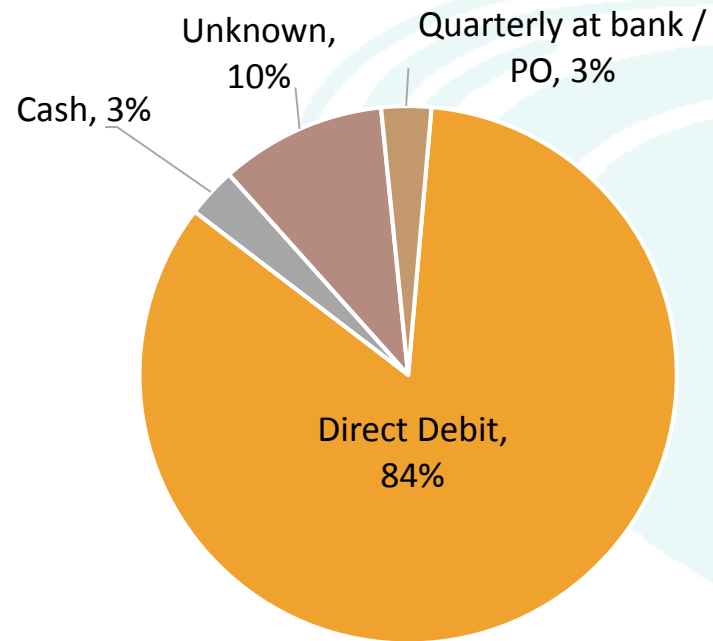
% of respondents, total sample (31)



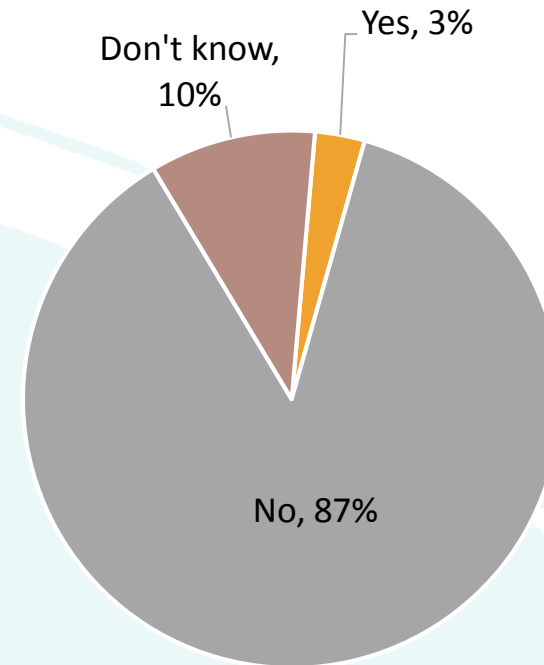
Care & Repair Clients: Energy bills and payment



How do your clients tend to pay their household bills?



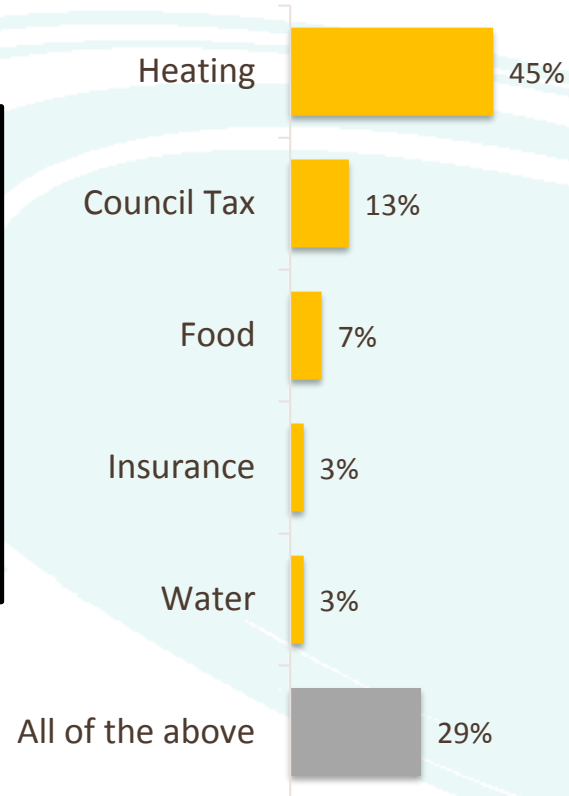
Are a majority of your clients on a pre-paid or credit meter?



Care & Repair Clients: Affordability



Have most difficulty in affording...



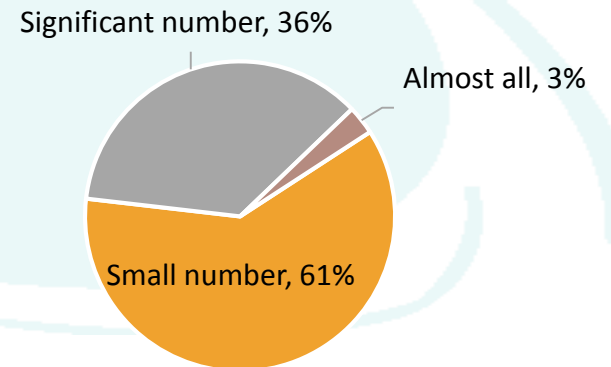
77% have **some difficulty** in affording energy bills

3% have **significant difficulty** in affording energy bills

77% have **some difficulty** in affording other bills, which affects ability to afford heating bill

10% have **significant difficulty** in affording other bills, which affects ability to afford heating bill

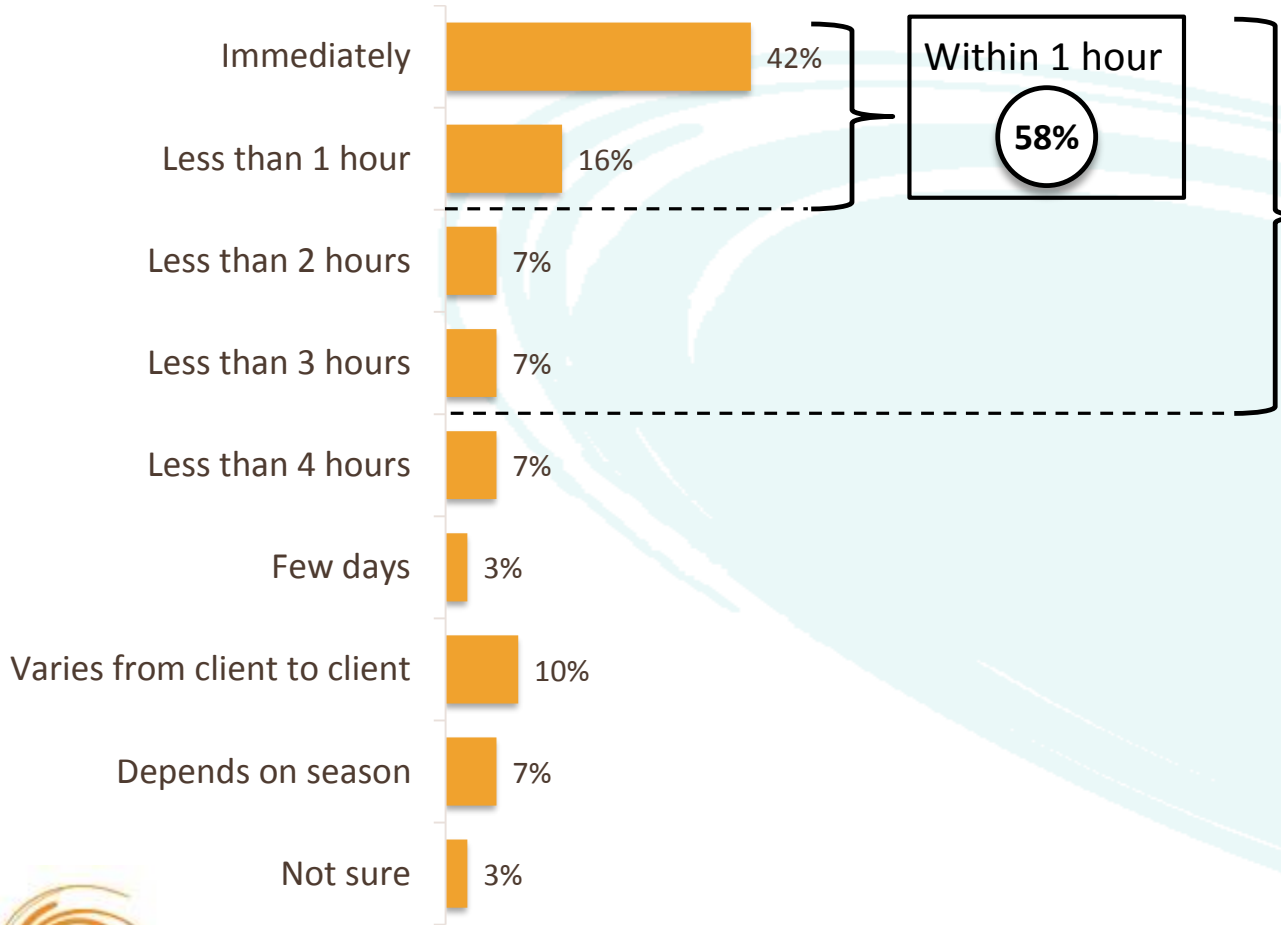
Do some of your clients only heat one or two rooms of their homes and/or limit the time they have heating on, to save money on their energy bills?



Care & Repair Clients: If gas supplies were interrupted...

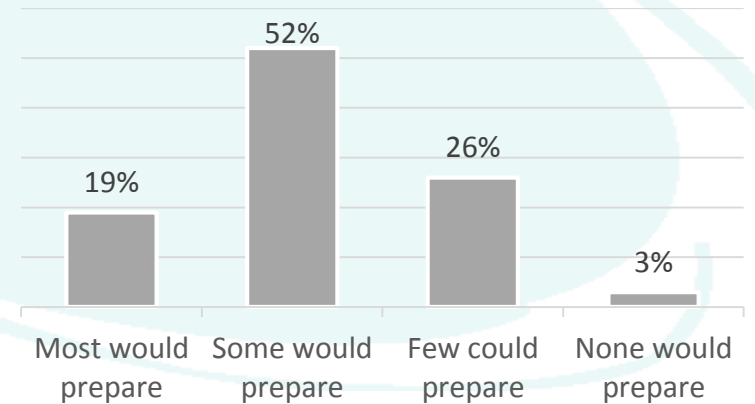


If your clients' gas supplies were interrupted without warning, how long would it be before this would cause them real problems?



% of respondents, total sample (31)

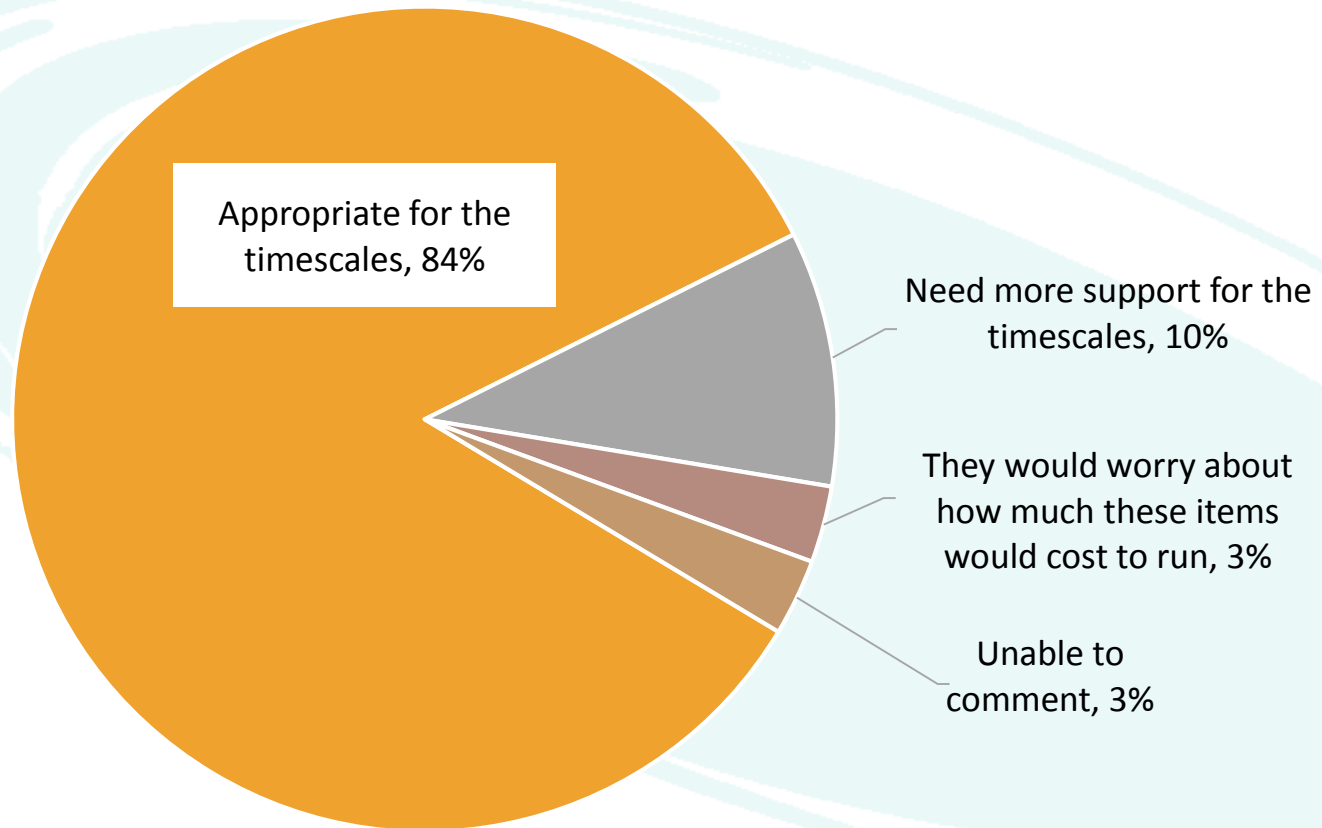
If your clients were warned beforehand that their gas service was going to be interrupted, would they be able to prepare adequately for this?



Care & Repair Clients: Reaction to WWU provision...



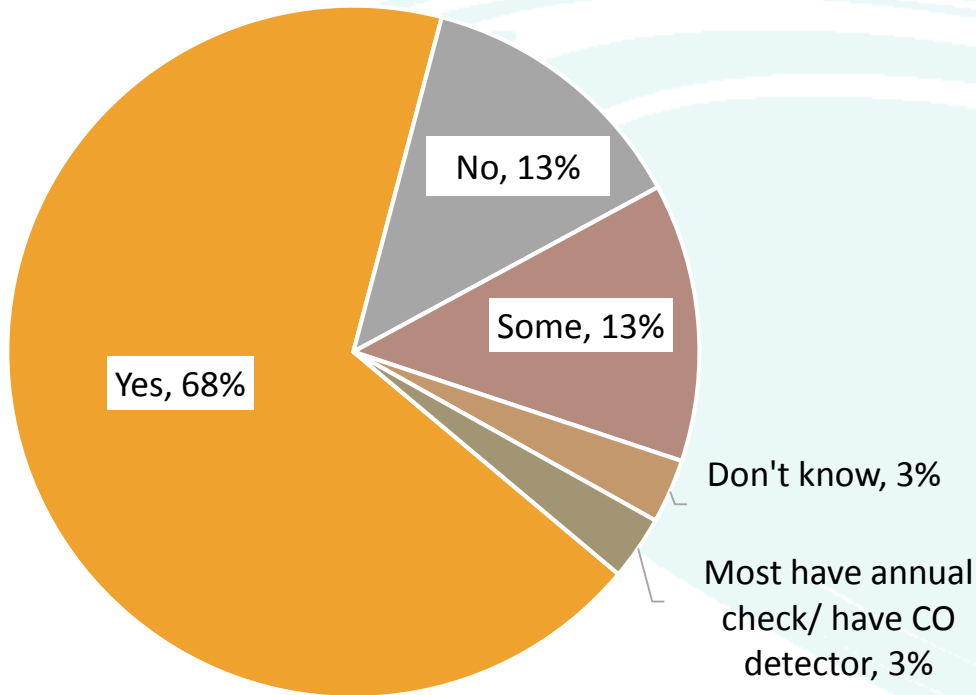
We provide alternative heating and cooking equipment to our priority customers whilst their gas is off and aim to restore their supply first. We will always aim to get the gas supply restored within four hours. Do you think these extra measures provide enough support?



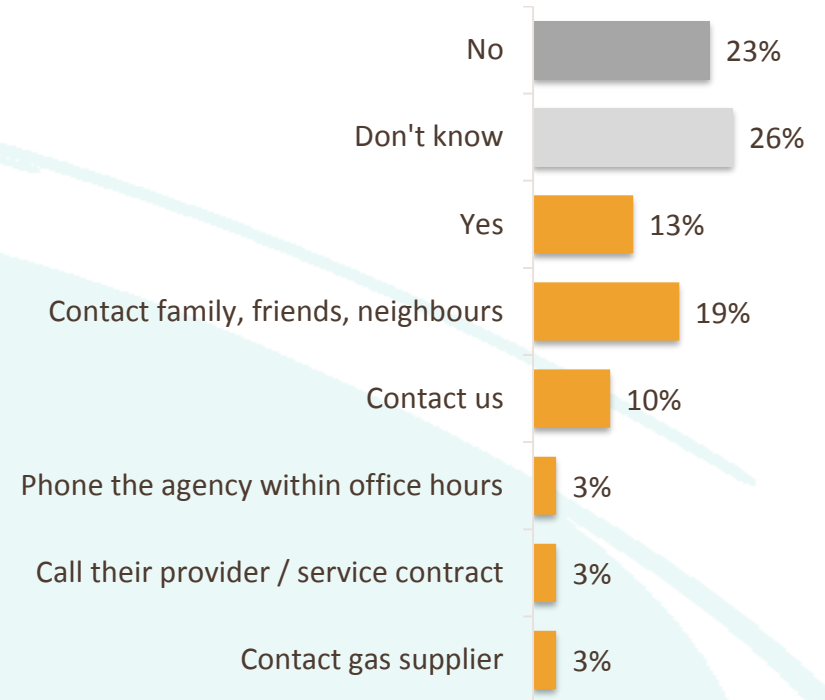
Care & Repair Clients: Keeping safe



Do your clients worry about their gas appliances not working properly / being safe?



If your clients smelt gas, would they know who to call to get help?



87% Believe their clients have some knowledge of the risks of CO

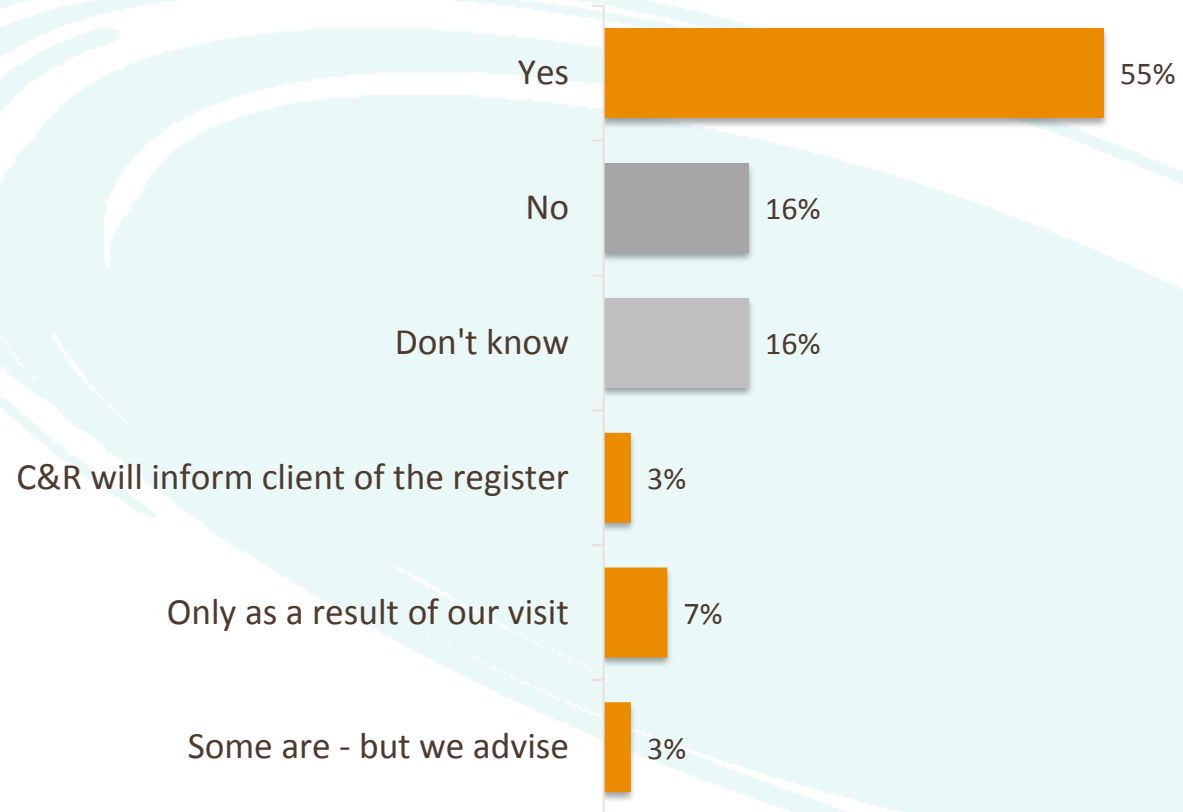
13% Believe their clients have full knowledge of the risks of CO

% of respondents, total sample (31)

Care & Repair Clients: PSR Awareness



Are your clients aware of Priority Service Registers, where people can register for priority treatment if their essential gas, electricity or water services are cut off?



Care & Repair: Supporting people in vulnerable situations



In your view, what more should Wales & West Utilities be doing to support people in vulnerable situations?

Already seem to be proactive in supporting vulnerable clients.

I think what they do is ample at the moment, I can't think of anything else.

Roll the Priority Service Register out to all vulnerable people, e.g. ones Care & Repair do not visit.

Make themselves more visible to older client group.

Possibly making more people aware of your priority service register.

Provide more information and advertising such as leaflets, advice contact numbers.

Provide leaflets and contact clients direct to provide advice on the priority register.

We all have a responsibility to do more - as people see each other less - community is disappearing and the elderly and vulnerable are slipping out of the system.

Some specific suggestions...

- Promote Priority Service Register
- Increase their profile (leaflets etc.)
- Local talks
- More partnership working
- Focus on the elderly who live alone
- Make the criteria for free mains connection easier / broader
- Help the older elderly (80+) with heating repairs – regardless of financial circumstances
- Provide fuel poverty grants to offer immediate assistance to vulnerable customers
- Reduce number of vulnerable people on prepayment meters

Customer Focus Groups



Customer Focus Groups: Key Findings



- There were low awareness levels of who WWU are and what they do
- Keeping the gas flowing safely and reliably is the clear number one priority
- The other stated priorities are also important but these did raise issues and questions about responsibilities and expectations (e.g. is/should this be the utility?...the supplier?...government?...or someone else?)
- Although this applies to the issue of supporting those most in need, the general consensus is that WWU is right to believe this to be a priority...
- The extent of the support available surprised respondents and they were of the view that more should be done to promote this
- Linked to this, the PSR prompted much discussion: sharing information between agencies is considered to be both common-sense and essential
- Because of their lack of awareness and understanding, respondents struggled to comment meaningfully on value for money: The general view was that an average annual cost of £128 represents good value...
- ...but this is only because they had been told about WWU and what they do: consequently, respondents were very keen to have this information presented to consumers across the region more prominently

Engagement with WWU



- A small minority of respondents (across the three groups) claimed to have had contact with WWU: mostly in relation to mains repair and replacement work in their neighbourhood
- Most had not heard of WWU and could only guess at their role and remit...

I was going to ask...I regularly do my gas and electricity and they never come up...so I thought maybe infrastructure?

I've seen the vans...

I just thought it was Wessex Water.

Did they take over from another company?

I'd assumed water...

- Widespread confusion about the energy industry in general and gas in particular: only a vague understanding of the role and scope of suppliers...and perceived overlap with WWU's role as discussions progressed
- Almost no recall of TV campaign
- Slightly more familiarity with Western Power Distribution

WWU's strategic priorities: Overview



Number one priority

(Almost unanimous agreement on this)

1

Reliable supply

WWU want to keep you safe and warm in your home with a gas supply you can rely on. To do this WWU need to continue to invest in your gas network to keep the gas flowing safely even in the worst of weathers.

All are important...

- ❖ ...almost impossible to rank by importance
- ❖ The 'reliable supply' priority is dependent on all three of these
- ❖ 2. key to the future
- ❖ 3. necessary because of 'how society is'
- ❖ 4. important...but some debate about responsibilities

2

A sustainable future

There are thousands of people across Wales and South West England that need extra support. WWU help them with low cost gas connections, financial support for appliance repairs and by prioritising them when things go wrong.

3

Supporting those in need

For a sustainable future, it's important WWU find greener ways to heat and power homes and businesses. Investment to develop new and innovative technologies is vital to meet your energy needs for today and tomorrow.

4

Promoting safety / efficiency

WWU serve a community of 7.5 million people and understand that their services often go further than the pipes in the ground that deliver gas. Working in partnership with community groups WWU raise awareness of vital gas safety and energy efficiency

Keeping the gas flowing safely



WWU want to keep you safe and warm in your home with a gas supply you can rely on. To do this WWU need to continue to invest in your gas network to keep the gas flowing safely even in the worst of weathers.

- No question, considered to be the number one priority for WWU
- All groups considered gas to be dangerous and therefore, safety must be the main focus

In terms of safety, their liability must be huge.

It's our safety at the end of the day.

- The statement raised many questions, including:

How is WWU funded?

Does this include connecting new areas to mains gas?

How do they prioritise repairs and replacement?

How often do pipes need replacing?

Do all GDNs work to agreed standards?

Investing for a sustainable future



For a sustainable future, it's important WWU find greener ways to heat and power homes and businesses. Investment to develop new and innovative technologies is vital to meet your energy needs for today and tomorrow.

- Considered by all to be critically important
- Prompted questions and discussion about gas supplies...how much is left?...how long will it last?...how can there be 'greener' gas?...how much does this cost?

The first one [priority] is high, immediate...this is more long-term.

I don't see how you can get greener gas!

Are we subsidising this?

- Cynicism also about government cutting subsidies for alternative energy
- Some debate also about why this should be the responsibility of WWU and whether it wouldn't be more efficient to organise vital energy research of this type at a national level...

Why would WWU be the people doing it...when there's a Scottish one, a Northern one...?



“ *There are thousands of people across Wales and South West England that need extra support. WWU help them with low cost gas connections, financial support for appliance repairs and by prioritising them when things go wrong.* ”

- This issue prompted a huge amount of discussion: strong opinions were voiced across all three groups!
- Key issues, broadly consistent to all sessions...
 - In an ideal society it should not be WWU’s responsibility to prioritise and support those most in need
 - However, the current environment is such that those most in need are often overlooked, resources are stretched and it is therefore important that we each look out for those around us...and this must also apply to WWU
 - Some groups are easy to identify as priority...the elderly (especially if living alone), those with physical disabilities, those on very low incomes
 - ...other groups are easy to overlook...those with mental illness, single parent households etc.
 - Whilst all agree that supporting those in need is important, many are concerned that some individuals will take advantage...enjoying the additional support without deserving it
 - Questions about how WWU identifies those most in need (leading subsequently to much discussion about Priority Service Registers, how they are compiled and how people get to know about them)

Vulnerable customers / Supporting those in need



The Priority Service Register



- Most of our vulnerable customer sample were, to the best of their knowledge NOT on WWU's Priority Service Register
- Much interest shown in the PSR (and from the focus groups)
- Generally strong and consistent views, which included:
 - Clear need for the PSR to be better promoted
 - Expectation that utilities, suppliers and other agencies will share information about those in vulnerable situations to produce one comprehensive, cohesive register
 - Customers should have to sign-up – or be signed up – only once...and from that point on, WWU, other utilities and suppliers should identify PSR members and prioritise them appropriately
 - Despite some awareness of data protection in general and GDPR in particular, respondents are of the view that the risks of being vulnerable far-outweigh data sharing regulations: common-sense must prevail and that means moving the onus away from the individual, towards the organisations that they come into contact with
 - Some discussions and concerns that a proportion of those attracted to the register will be less deserving: important that it is reserved for those genuinely in need

The Priority Service Register



*I've had no dealings with them whatsoever...had no communication.
[this lady had suffered several strokes and has severe mobility issues]*

How do you find out if you're on the register?

I didn't know it existed.

I'm surprised that kids under five are classed as such a high priority compared to the others...the elderly...

I thought that was British Gas...because I'm one of them.

Pension Credit is like the 'magic bullet'...then you're on everything.

Is mental illness covered?

Why does each have a separate register? If you're on it for gas you should be on it for electricity.

Who compiles the list?



WWU serve a community of 7.5 million people and understand that their services often go further than the pipes in the ground that deliver gas. Working in partnership with community groups WWU raise awareness of vital gas safety and energy efficiency

- Again, this statement prompted significant discussion
- Key issues and observations included:
 - Difficult to disagree with the sentiment but respondents suggested that their lack of awareness of WWU does call into question the success of this strategic priority
 - This is a crowded space...many organisations are trying to get their messages heard: for example, the focus groups included several teachers who talked about packed curriculums and limited time for outside organisations, however laudable their aims and important their messages
 - Some thinking that this should be the responsibility of gas suppliers, not the 'infrastructure managers'

Could be wasting money if it's duplication.

...less efficient if there are more people dabbling in this.

Speaking as an ex-teacher, we had a lot of people trying to deliver their stuff...I don't know how effective...not much room in the curriculum...

Customer service standards and expectations



Keeping interruptions to gas supplies to a minimum

Communicating effectively when our work impacts you

Keeping the sites where we're working as tidy as possible

Resolving complaints quickly and compensate you fairly if things go wrong

- To an extent, discussions were shaped by the fact that almost all respondents had not had direct contact with WWU
- Many respondents claimed they could never recall an interruption in their gas supply
- Much of the focus was on communication: the degree to which interruptions are disruptive depends largely on how well communications are organised

Communications firstly...so that you know what's happening.

- Letters/cards through the door believed to be the most effective means of communicating, ideally backed-up by someone making door-to-door visits
- Important to keep communicating throughout – pre, during and afterwards
- Keeping sites tidy is important – but no problems experienced in this respect
- Resolving complaints:

I'd expect a response [not necessarily resolution] within 24 hours.

...2 weeks to get it resolved would be good...a month would be pushing it.

Frustrating if you have to speak to a machine...

It's about common-sense...some need to be rectified quicker than others.

Swansea group more cynical:
poor perceptions of utility companies – need to be set strict standards

Value for money



- Issues of funding and value for money prompted much discussion
- Broadly consistent responses across all three groups:
 - Very little knowledge or understanding of how WWU is funded
 - Groups guessed that a proportion of gas bills is diverted to WWU
 - Appetite to know more about this – expect to have this information clearly presented to them on bills
 - An average of £128 per year is believed to represent good value for money...
 - ...especially when they appreciated this included covering the cost of emergency call-outs...
 - ...but Taunton group strongly linked value for money to profits...and without knowing how much profit WWU makes, some suggested it was impossible to comment on value for money

...would rather give WWU more than the supplier as they are the ones ensuring our safety.

Gas suppliers take our money and claim they keep us safe but it is actually WWU.

It should be stated clearly on the gas bill...why isn't it?

My point is...if you're paying 35p a day, and you have an emergency, they'll turn up within an hour...that's pretty good value for money!

Best way for people to find out about WWU is if it is itemised on your bill and an explanation given of who they are and what the charge is for.

I don't think we're given enough information...I didn't know some went to your company.

I think that's good value considering what the network is, the number of people...

You'd have to know how much are they in profit...are they making big profits?



- Across the focus groups and depth interviews, there appeared to be very high awareness levels of carbon monoxide and its dangers

It kills!

It's just so dangerous

- Many had alarms fitted; some indicated that they had arranged for boilers to be moved to eliminate the risk
- Some discussion about how they knew about CO and whose responsibility it should be to educate consumers: in general respondents believed it to be the responsibility of their gas supplier
- No specific recall of any WWU activity or initiatives in this area (but respondents admitted that they struggle to differentiate between utilities, suppliers etc.)
- Some questions from respondents in vulnerable situations about whether WWU would fit alarms free-of-charge

Vulnerable Customer Depth Interviews



Vulnerable Customer Depths: Key Findings



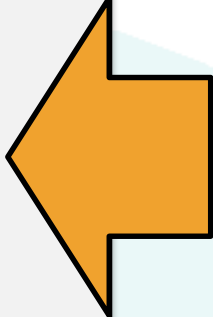
- Our sample spanned a wide range of needs and potential vulnerabilities, relating to age, to illness and disability, to financial hardship and to family and household circumstances
- In many cases, multiple vulnerabilities were outlined or became apparent
- By no means all believed that they should be treated as a priority by WWU, but it was clear that most of our sample were potentially very vulnerable
- The most obvious danger is losing heating and/or hot water: for many this would pose real problems
- However, it was also evident that the situations many of our sample find themselves in lead to anxiety and fear of any disruption to their normal routines (and this is compounded for those living alone)...
- ...and although the support measures WWU has in place were considered to be excellent (albeit unknown by many), there was a very clear sense that as important as the tangible provisions is a need for a systematic means of communicating and managing anxiety ahead of, during and after any work that WWU undertakes that has an impact on them

Range of vulnerabilities



Our sample represented customers with a very broad range of potential vulnerabilities, which included:

- Pensionable age
- Disabilities:
 - Stroke
 - COPD
 - Heart disease
 - Liver disease (including at least one dialysis patient)
 - Cirrhosis
 - Fibromyalgia and ME
 - Arthritis
 - PTSD
 - Anxiety and depression
 - Sight and hearing impairments
- Children under the age of 5 (and/or children with particular needs and vulnerabilities – OCD, autism, ADHD etc.)
- Financial hardship / reliance on benefits and payments

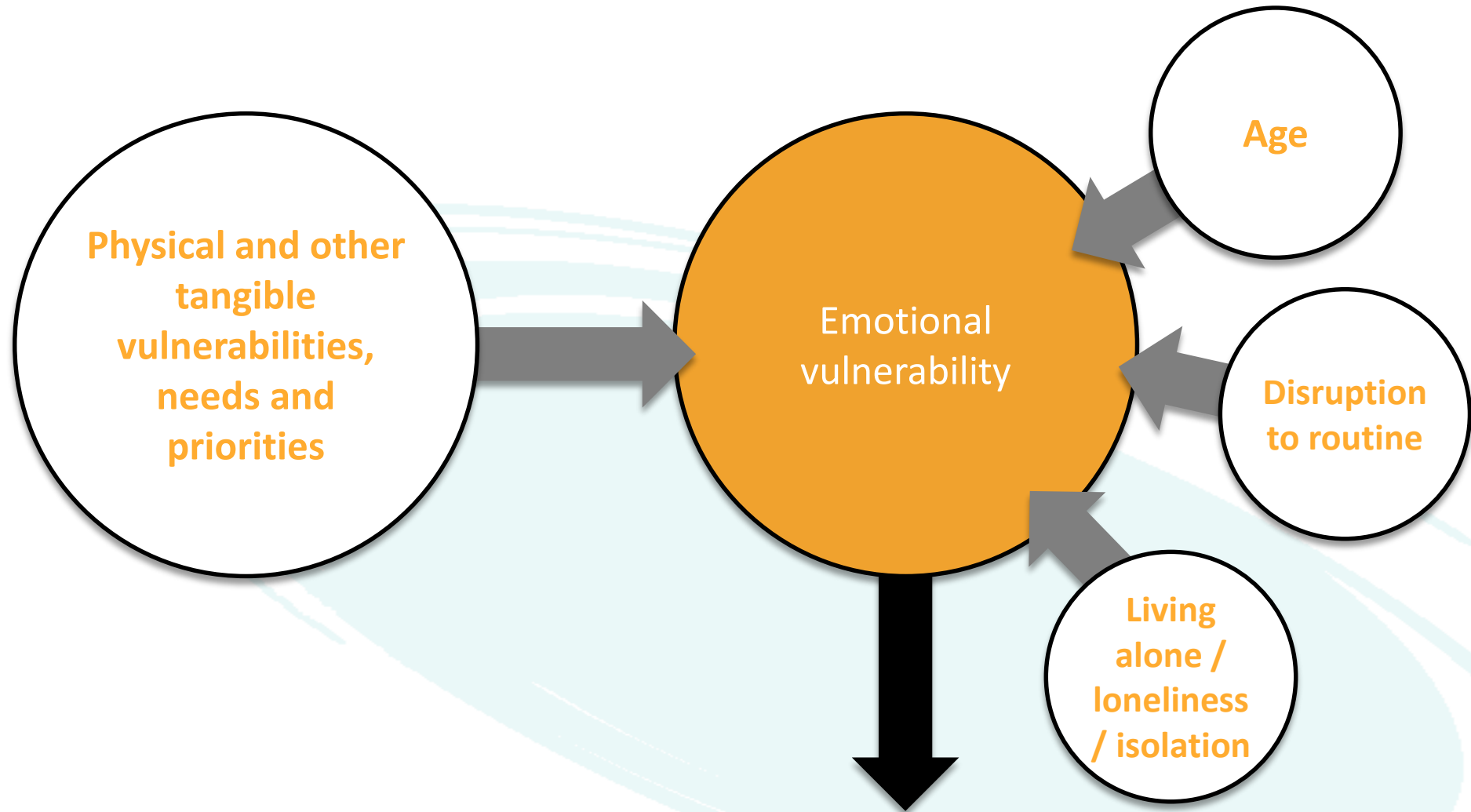


In very many cases, respondents suffered from multiple-vulnerabilities



- Living alone is self-evidently a vulnerability in itself and is especially significant for the ‘older elderly’
- This was identified by the customer focus groups – which suggested that this group should be treated as perhaps the highest priority...
- ...and many of the vulnerable customers we visited were in this situation and spoke at length about the vulnerability of living alone – and the tendency for this to lead to anxiety
- Living alone has both practical and emotional impacts:

- There is the obvious vulnerability of not having someone on hand to spot issues, problems and dangers
- Old age is often coupled with illness and disability so any change to routine is challenging without someone to share the burden and make practical arrangements
- Not being able to share and discuss often leads to increased anxiety...
- ...to the point that anxiety about potential disruption to routines can become more of an issue than the ‘tangible’ vulnerabilities



Situations and support: Mini case-studies



Mrs G

- Registered disabled for 40 years
- Serious back problems and chronic arthritis
- Periodically, she is a wheelchair user
- Wary of cold-callers and has suffered identity theft
- Cold weather affects her joints so hugely reliant on heating
- Has family and friends she could turn to

Mrs S

- Suffers Fibromyalgia and chronic fatigue
- Can't control her temperature – sweats a lot and this leads to stress
- Financially vulnerable: her and her 2 children use blankets and hot water bottles in the lounge as can't afford to always heat
- Mobility issues – takes a long time to get to the door (and often sleeping)
- Gas interruptions would cause real problems: key worry is lack of hot water

Mrs H

- Chronic back pain, ankles, knees, COPD, high blood pressure, heart disease (awaiting stents/ pacemaker)
- Grandson is fulltime carer
- Not concerned about cooking but heating could be a problem in winter...
- ...would need an alternative but concerned about the cost of running alternatives (e.g. a fan heater)

Mr D

- Had heart surgery...not back at work yet but intends to
 - Step daughter had a brain tumour and is registered blind – requires constant care
 - Change in routine severely affects daughter – OCD tendencies
- “Gas off for a few days when they did the meter. Got us a stove but we had to take her to my sisters to get her a bath – didn't offer another alternative. Hotel not an option as can't leave the dogs...”*

Ms P

- Single mum with young children
- Has family locally and generally feels that she doesn't currently represent a priority case
- Struggles to afford bills but manages to economise
- Being without heating can be annoying – no hot water is especially challenging
- Could move out for a day or two if given notice

Mr H

- Suffers PTSD, discharged from Navy
- Partner is carer
- Main impact...
“...very anxious...can have episodes of confusion and fear...leads to a mistrust of people and things that break routine. Dealing with the unknown is the worry, and being stigmatised for not really being ill at face value...”

Supporting the vulnerable: WWU's response and provision



- Most respondents did not know the support measures WWU has in place for those in vulnerable situations (both in relation to PSR requirements and 'over and above' WWU initiatives)
- Measures were outlined to the sample as follows:

The benefits of being registered on the Priority Service Register...people on the register...

- Will be offered alternative cooking and heating facilities if their gas supply is interrupted
- Could have their gas meter moved for free if they are unable to access it
- Can choose a password to make sure they know our engineers are genuine
- Can ask their suppliers to send their bill to a trusted friend or family member
- Will benefit from our 'Knock and Wait' service

Other WWU support measures...

- Locking Cooker Valve
- Hardship Fund
- Free of charge alterations
- Service to educate about the dangers of Carbon Monoxide and provision of CO alarms
- Alternative cooking and heating facilities (e.g. hotplates and fan heaters; microwaves; oil-filled radiators; keep warm packs)
- Warm Home Assistance Scheme

- Once informed about these support measures, almost all were surprised and cheered by the extent of the measures
- ...but this often led to questions about why they hadn't been informed
- Alternative heating facilities were believed to be relevant and vital by almost all
- All measures and initiatives resonated with some members of our sample



- Respondents – both in the vulnerable customer sample and those who participated in the focus groups – were consistent in their view that WWU must continue to develop strong links with its partners
- This applies especially to looking out for the most vulnerable
- Although much discussion took place about how far WWU should get involved in referrals (e.g. in relation to income, debt or health concerns), the majority view was that they should...

They should be...cos they're there...if they've seen it...

They should...at the moment there's not enough eyes on it in the community.

- A small number of respondents in the vulnerable customer sample expressed some reservations about how far WWU should 'intrude' – largely based on pride and a perceived stigma attached to 'being in need' or asking for help

Conclusions | Next steps



Conclusions



- This broad programme of research has used both qualitative and quantitative elements to collect the views of WWU customers – including those who could be considered priority – as well as a sample of Care & Repair caseworkers
- The focus has been both on WWU’s strategic priorities and also on it’s day-to-day operations, the impacts they have, the standards customers expect (and experience) and on the particular needs of those who might be considered to be in the most vulnerable circumstances
- **WWU is unfamiliar to most** customers but there is a strong appetite to know more: customers feel they *should* know who looks after the gas network. Consequently, respondents consider that **raising its profile should be one of the priorities** for WWU: In particular, they want to know:
 - Who WWU is and what are its responsibilities?
 - How are they funded and what is the cost?
- ...and **armed with this knowledge, the likelihood is that perceptions of value for money will be positive** (based on the reactions of our focus groups)
- In terms of its stated priorities, customers very clearly feel that **maintaining a reliable and safe gas supply is the number one priority**
- However, the other stated aims are also considered important and much discussion took place about **the importance of looking out for those most in need**: In fact, respondents tended to express very strong views about the need for the PSR to be more widely promoted and for agencies to share information so that those most in need can be identified and supported

Caveats and next steps

- It should be said that turn-around time on this project has been such that, for the qualitative elements in particular, the findings detailed in this presentation represent the 'tip of the ice-berg'.
- In particular, we conducted 20 depth interviews with vulnerable customers and the feedback from these – which is considerable and detailed – has been impossible to fully analyse and communicate ahead of this presentation.
- We suggest that, given time, we should produce a more detailed report, perhaps using a selection of case studies to illustrate the breadth and needs of customers with a broad range of vulnerabilities.
- We feel this would help WWU to shape the specific provision for those in vulnerable situations.
- Research of this type should be used to understand the type of proposition appropriate to an audience – and the detailed case-studies will be invaluable to this end for vulnerable customers. Once WWU's response and detailed propositions have been developed, further research will be necessary to test and refine.

Stakeholder Research Programme

For more information:

Contact:

End of presentation

Martin Olver / Emma Grove-White
Mindset Research
Trym Lodge
1 Henbury Road
Westbury-on-Trym
Bristol
BS9 3HQ

Tel: 0117 959 6484

Mobile: 07905 134103

Email: martin@mindsetresearch.co.uk

Web: www.mindsetresearch.co.uk