



25th world gas conference  
"Gas: Sustaining Future Global Growth"

# Understanding the Natural Gas Consumers of the Future

Results of an Empirical Investigation and Recommendations for the Gas Industry

By: Prof. Dr. Dominik Halstrup  
University of Applied Sciences Osnabruck

Date: Thursday 7<sup>th</sup> June  
Venue: CS10.2, Emerald



Patron



Host



Host Sponsor

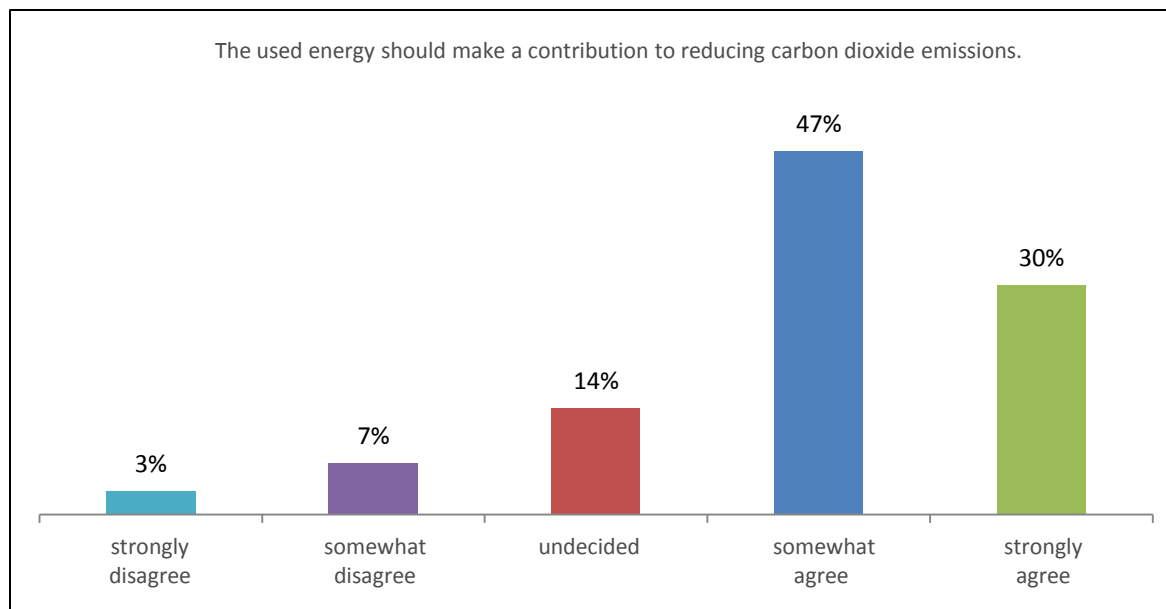


# Challenges

- Competition between different energy sources and systems in the end customer market (esp. in the new construction market).
  
- Challenges for Gas Industry (downstream):
  - (1) Attracting (and retaining) new natural gas consumers,
  - (2) (Re-)Positioning of Natural Gas (in addition to renewable energy sources) as an attractive product of the future.
  
- Marketing-Strategists in the Gas Industry should proactively address the question of how the end customers of the future perceive natural gas today.

- Focus
  - Leading Questions: (1) What is the perception/image of natural gas in the group of expected home owners of tomorrow? (2) How could/should the Gas Industry influence the perception/image of natural gas in this target group?
  - Primary survey, focusing on academics and prospective academics (as expected natural gas customers of tomorrow)
  
- Empirical basis (Pre-Study)
  - 197 (=n) academics and prospective academics (age 20-30, university and college, business administration, economics and engineering sciences, various locations) as expected future home owners, and therefore expected future users of natural gas
  
- Method
  - Descriptive cross-sectional study: Written survey, multi-item scales
  - Random sampling: Simple random selection, various courses of study and various types of institutions in Germany
  - Analysis of the data: Simple descriptive methods (frequency distributions, cross-or contingencies, etc.)

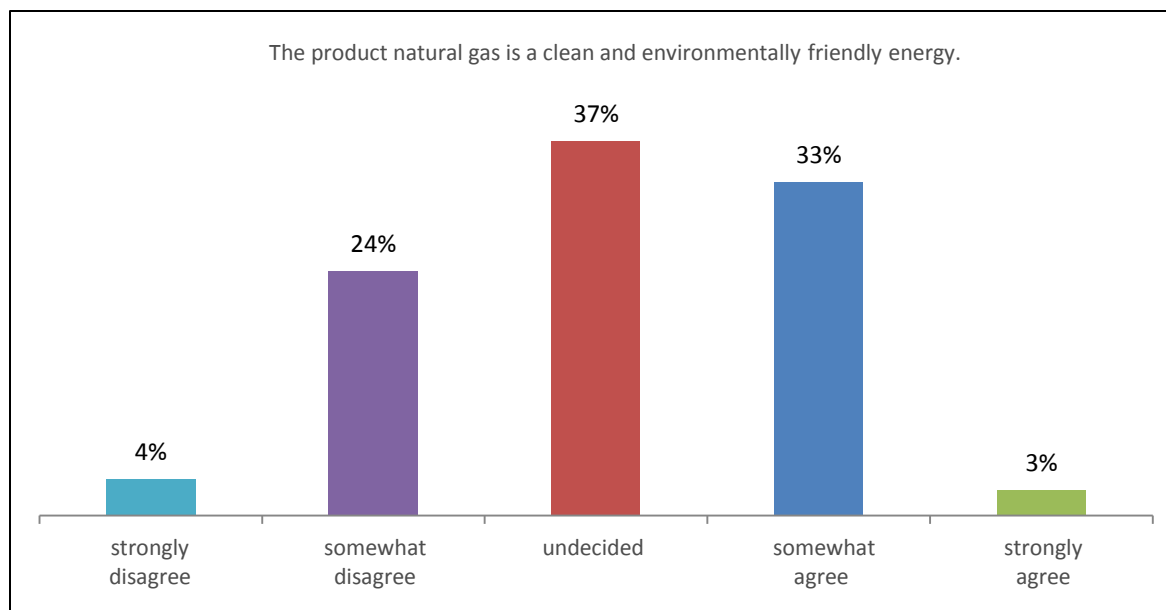
# Role of Climate Issues



2011/12 | © HS Osnabruck | Prof. Dr. Dominik Halstrup

Climate issues are of prominent importance for target group resp. energy users of tomorrow.

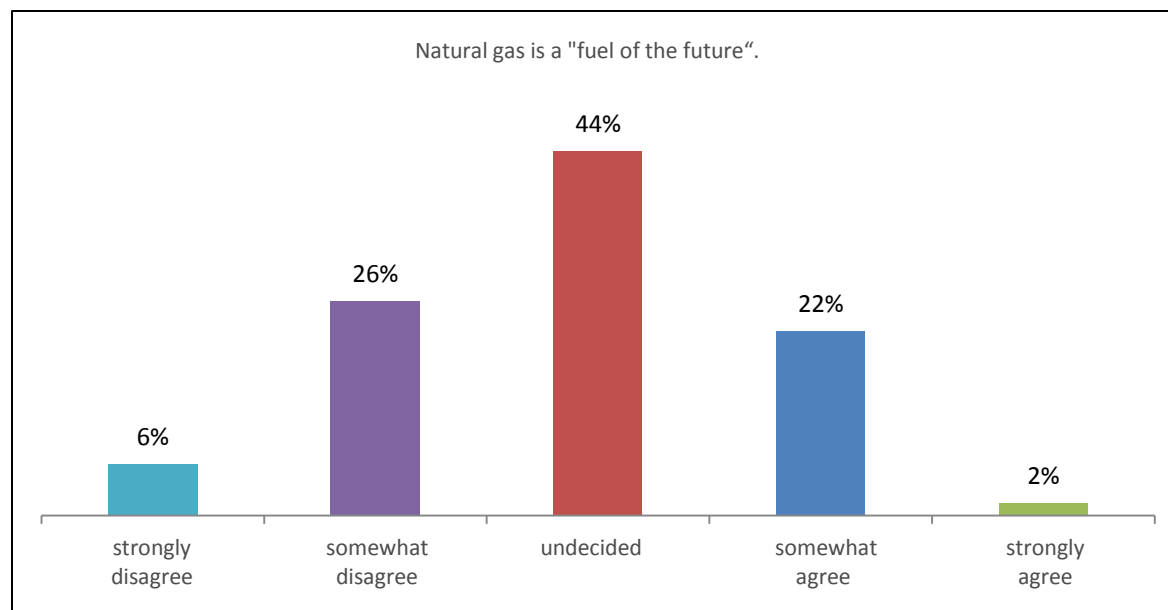
# Perception of Natural Gas (I)



2011/12 | © HS Osnabruck | Prof. Dr. Dominik Halstrup

28% of the target group not perceiving natural gas as a clean and environmentally friendly energy (and 37% being undecided).

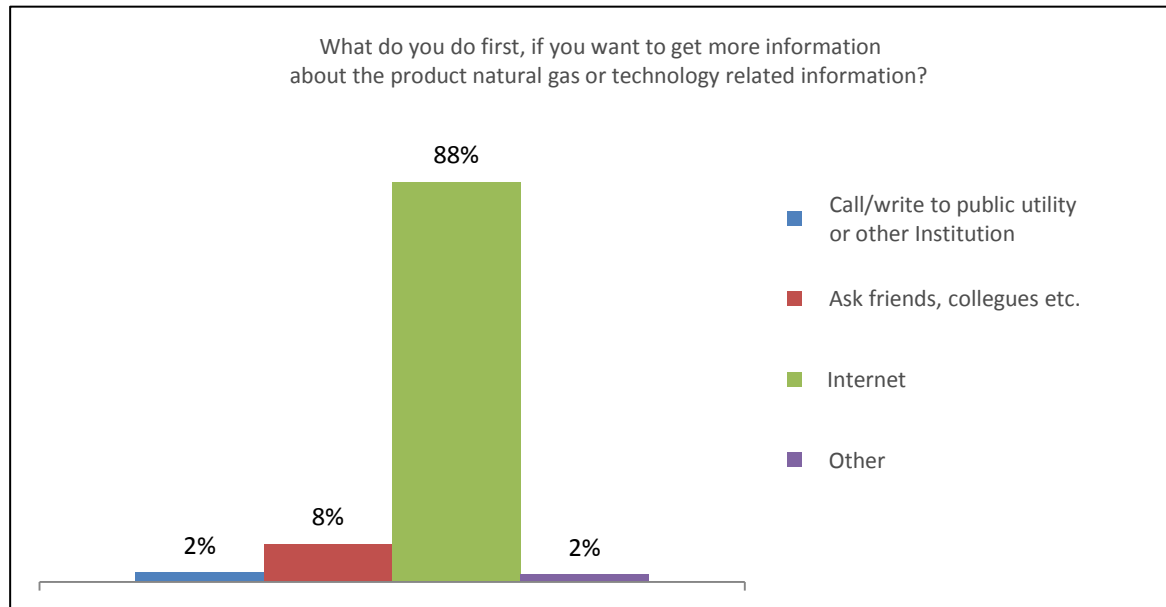
## Perception of Natural Gas (II)



2011/12 | © HS Osnabruck | Prof. Dr. Dominik Halstrup

Overall, the majority of the study participants currently does not perceive natural gas as a „fuel of the future“.

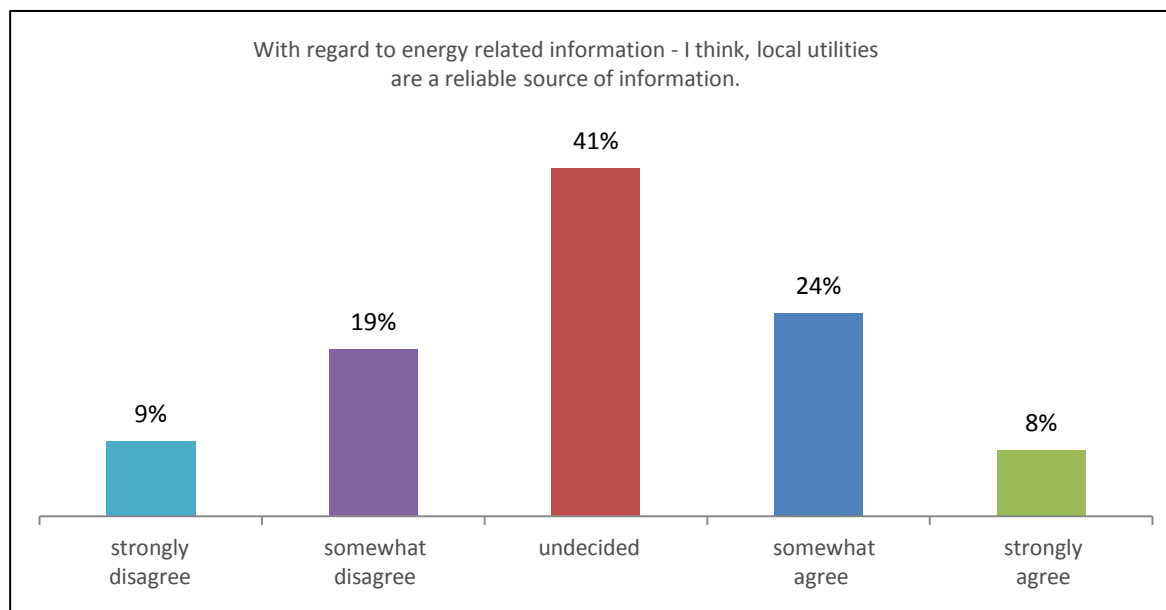
# Use of Internet in Target Group



2011/12 | © HS Osnabruck | Prof. Dr. Dominik Halstrup

The Internet (including Social Media) has to be seen as main Communication Channel (and Service Platform) for target group.

# Public Utilities as Source of Information



2011/12 | © HS Osnabruck | Prof. Dr. Dominik Halstrup

Public Utilities as Source of energy related information should be seen at least critical.



# Lessons learned / Recommendations for Marketing Strategies

## Study results show ...

- A** that climate issues of energy sources and technologies are of high importance in the examined target group
- B** enormous potential with regard to the improvement of the perception of natural gas in the examined target group
- C** the importance of the Internet (and Social Media) as main communication channel (for primary information about product and industry) of the target group
- D** that the image of public utilities (Germany) is good, but not the best in the examined target group

## Decision makers should ...

- 1 review the Communication Mix; stress in particular positive environmental qualities of natural gas in targeting the customers of tomorrow
- 2 perceive Internet (and Social Media) as main platform to communicate with the examined target group
- 3 consider to reallocating the Marketing Budgets in favor of Internet Communication including Social Media
- 4 win Independent Organisations to support positioning of natural gas in the examined target group

# Understanding the Natural Gas Consumers of the Future

Results of an Empirical Investigation and  
Recommendations for the Gas Industry

By: Prof. Dr. Dominik Halstrup  
University of Applied Sciences Osnabruck

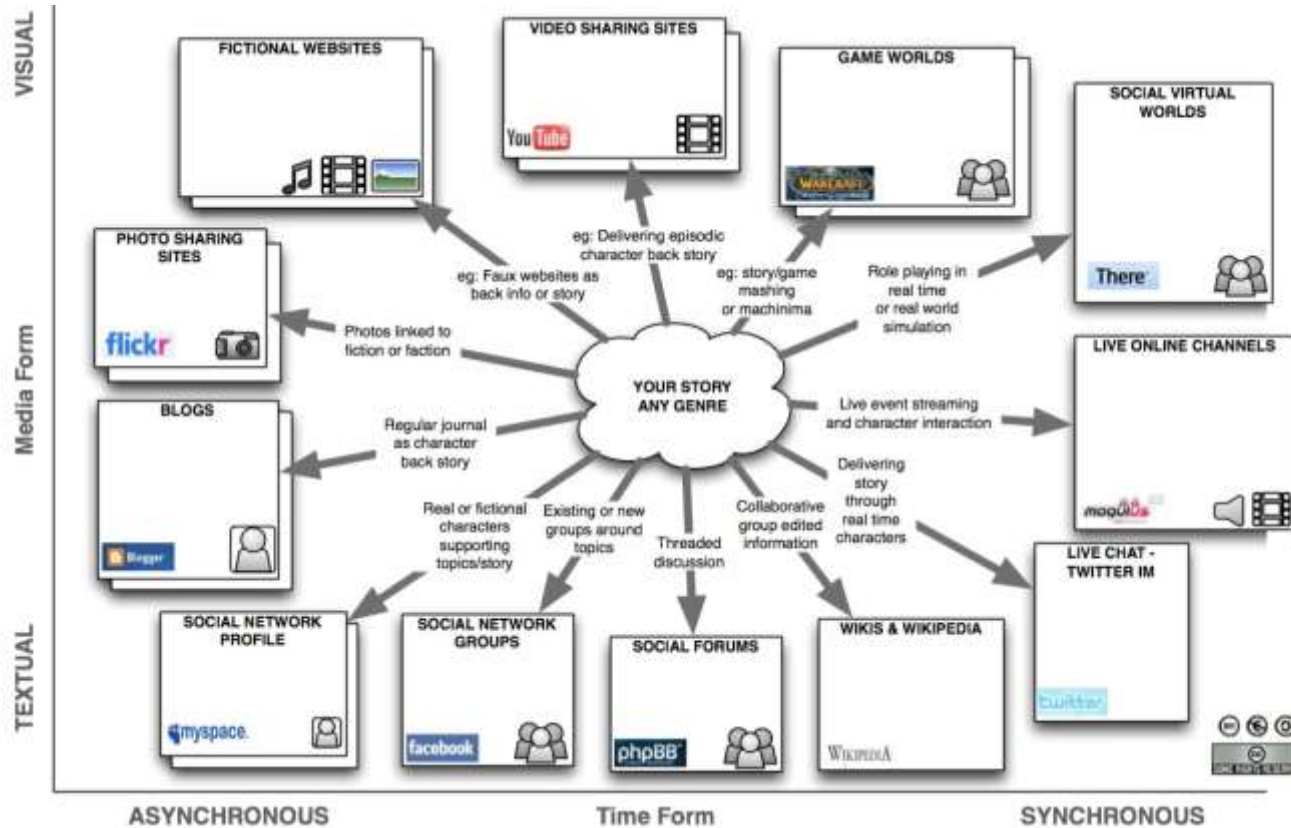
Date: Thursday 7<sup>th</sup> June

Venue: CS10.2

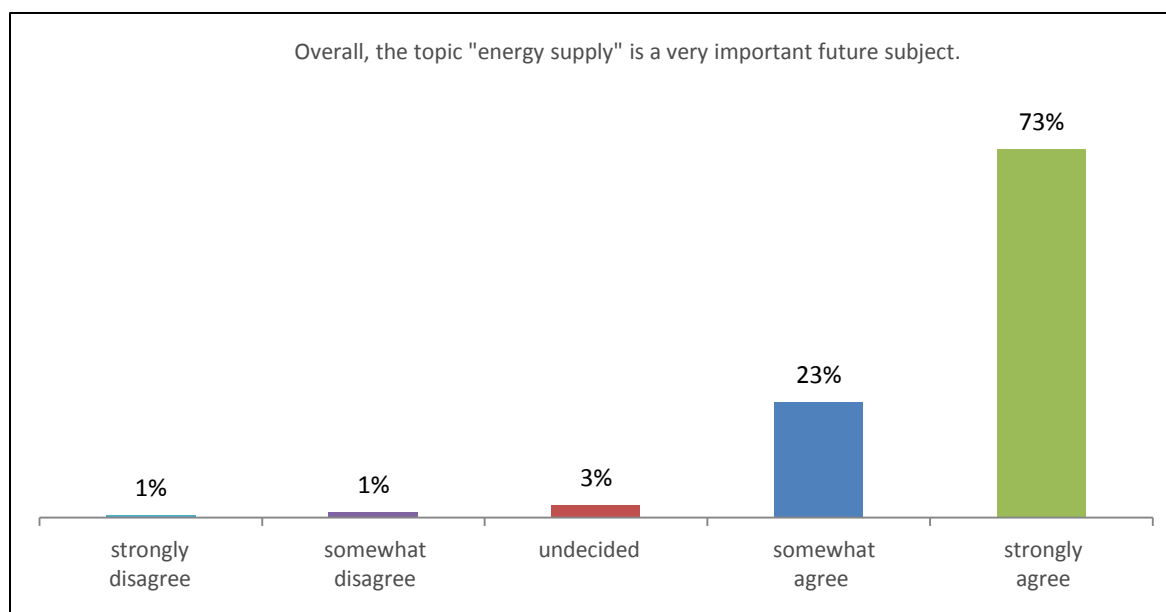
Thank you.

([www.fee.hs-osnabrueck.de](http://www.fee.hs-osnabrueck.de))

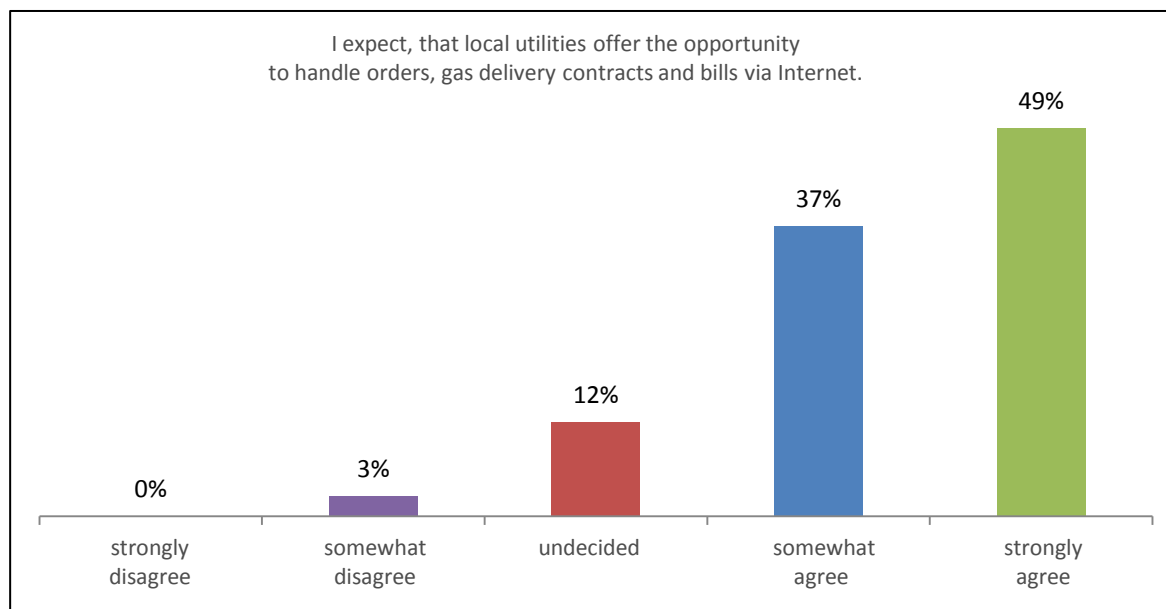
# Integrated Online-Approach



# Energy Supply important issue



# Internet seen as Point of Sale



# Perception of public utilities (Germany)

I perceive public utilities as ...

aloof	33%	36%	31%		in touch with the people
passive	39%	31%	30%		active
“dusty“	35%	43%	22%		modern
bureaucratic	59%	31%	10%		unbureaucratic
untrustworthy	21%	45%	34%		trustworthy
“crusty“	33%	48%	19%		innovative
unreliable	9%	24%	67%		reliable