
Cadent
Your Gas Network

# Listening and acting for consumers

# How we are meeting consumer needs

## Keeping people warm while protecting the planet.

**The majority of the population – around 86% – use gas as the primary source of heat in their homes and businesses[1]. We own and maintain the pipeline that delivers the gas they need, whilst investing in ways to ultimately decarbonise what we do to support the UK's transition to net zero. While our brand is little known to many of the public, everyone who receives a gas bill is ultimately paying for the services that we provide.**

That adds up to nearly 11 million consumers and it is a clear priority for us to engage and listen to their views so we understand what they consider to be important, using insight and experience to drive action throughout the organisation.

Through various methods over the last 24 months, we've engaged extensively with consumers and stakeholders and this report summarises the key insights that lay the foundations for the services we provide today and for our business plan going forward.

**86%**

of the population, have gas as their primary source of heat in their homes and businesses

**11million**

homes and businesses served by Cadent

**"We are always striving to provide better levels of customer service and support our local communities in ways that add the most value. In order to do this, it is essential that we provide a platform to engage with our consumers and expert stakeholders to inform our decision making process. This report provides a snapshot of some of our latest consumer insight work and explores a number of strategic themes that we see emerging as we continue to engage."**

**Mark Belmega**
Director of Sustainability and Social Purpose

**"Maintaining the UK gas network's excellent safety and reliability standards remains crucial, and providing outstanding customer service has never been more important, especially when considering the number of households living in vulnerable situations and fuel poverty. It is great to see Cadent's plans to use customer insight to shape their plans at this early stage. The challenge with the shift to low carbon solutions is evident but keeping homes warm is the immediate and ongoing need. I am really interested to see Cadent's focus on leakage and shrinkage, which will hopefully reduce carbon in the atmosphere in the immediate term, while the company continues research into greener gases. Myself and the Customer Challenge Group will work with and challenge the Company to ensure investment into the network meets consumer needs both today and in the future."**

**Angela Love**
Chair of Customer Challenge Group

## What this report covers

- How our ongoing consumer engagement approach ensures that insights sits in our internal governance and decision making framework.
- What consumers are telling us about what they want and expect from us.
- Why we continue to support vulnerability and sustainability.
- How we will use further research to build a deeper understanding of consumers and stakeholders to shape the business plan going forward.
- A stimulus for meaningful discussions with collaborators, stakeholders and the regulator as the business plan is further defined and developed.

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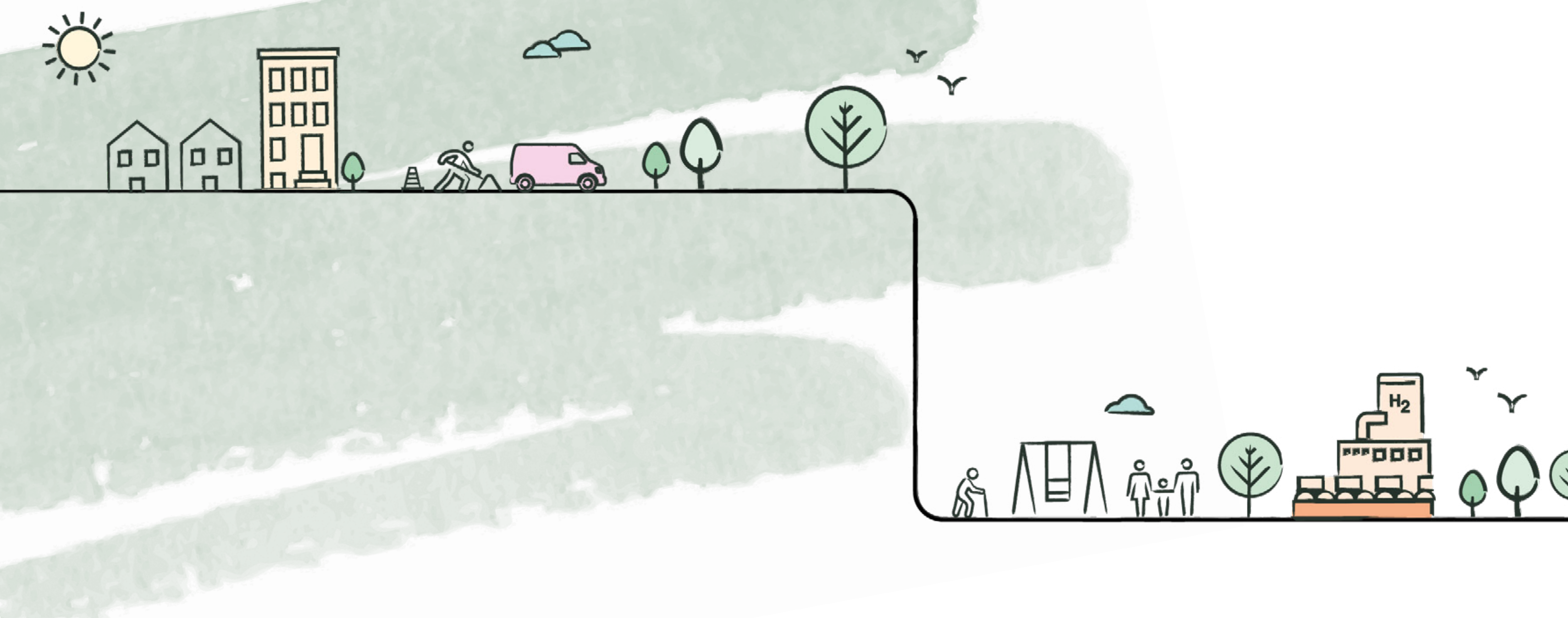
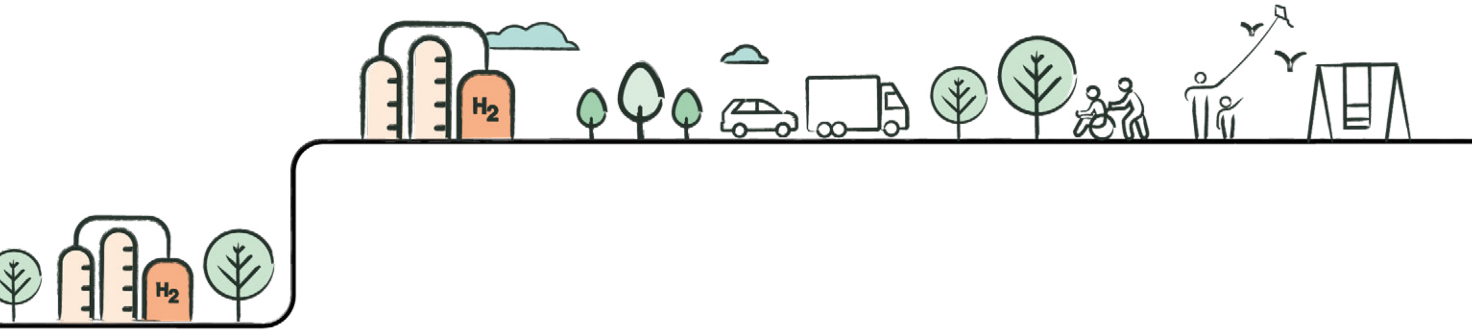




Section 1

# Understanding energy in the current context of peoples lives

**Energy price increases have impacted consumers, business and industry, both directly with increased energy bills and more holistically through the cost of living crisis. Although, the Cadent element of the total gas bill remains small.**

**Before we explore how we consider this within our forward-looking business planning process, it's important to understand the current context of energy in people's lives.**

### Current perceptions

Consumers are faced with unprecedented times with respect to energy. Our research tells us, increases in the cost of living have made energy an everyday conversation, with 55% of consumers being anxious about energy and 42% confirming that the increase in energy bills is negatively impacting every area of their life[2].

While there is a general awareness that the war in Ukraine and post-pandemic economic factors are contributing to rising costs, consumers are still confused as to why prices are high. Our studies show that 43% do not understand the bill breakdown[3] and 22% do not confidently understand how to read their bill[2]. An increasing number of people are entering fuel poverty – around 2 million since before the cost-of-living crisis, making a total of around 6.5 million in the UK[4] – with 23% using their savings to help fund energy bills[2].

Government funding is available but our research shows that only 13% of the population are accessing the funds in the last year[5]. Despite increased awareness campaigns, there is still a challenge to ensure that consumers claim the funding available. Part of the problem is, we believe, a lack of understanding by consumers as to what benefits are available and who is entitled to them. This may be why many people do not believe that energy companies or the government are doing enough to support consumers to ensure that those who most need help are connected to the right level of support[5].

Trust in energy companies has always been a complex issue for consumers but lack of understanding on why bills have recently risen so dramatically does not help. In addition, awareness of the role of network companies such as Cadent play in the energy landscape remains low.

We've also seen that engagement in other public funded services, such as water, is more of a topic than ever before. Consumers want to see long-term investment in services and accountability for where their money has been spent.

### Changing consumer behaviour

Nevertheless, there are positive changes in consumer behaviour that could leave a legacy and support the transition to low carbon solutions.

Our research shows 75% of consumers are making changes to reduce energy consumption, with 75% of consumers acting on their energy usage patterns to reduce consumption[3]. More people are taking regular meter readings in response to advice about saving costs – 50% giving meter readings in the past year[3] – and many are following hints and tips to make savings on overall energy consumption and efficiency and are actively seeking more information. Consumers are most likely to go online to search for help, and experts such as Martin Lewis are trusted by consumers with the Money Saving Expert website promoting initiatives such as the Priority Services Register for consumers to access help.



We are seeing a natural draw to smart meters and people benefiting from the in-home displays (35% have started to use their smart meter more[2]). Where consumers are engaging with news reports of business and government support interventions, they tell us that this is creating a genuine feeling of hope and is motivating people to take further action, in particular the younger generation[6].

### Attitudes to home heating

The uptake of electric heating remains low, with breakdowns and home moves remaining the main drivers to changing a heating system in the UK. People in the UK are accustomed to instant heat and hot water to meet their primary needs of comfort and convenience at home, and todays home energy systems are highly optimised with 40 years of investment to keeping people safe, warm and working.

The trajectory to net zero has slowed and the scale of change for end consumers is not generally well understood. We have first hand experience of communicating with consumers the changes required in their homes to decarbonise their home heating as we have led the engagement in the first trials to stop natural gas in home. This has provided us with clear evidence that there will be opposition to mandated change. More work is required to set out a clear transition plan for consumers on their role and choices in achieving net zero. In addition, there is a slowing on net zero action by the UK government as it recognises the challenges in supporting consumers through such extensive changes. Through our research consumers have told us that they are reluctant to invest in larger purchases right now therefore the journey to net zero and making changes to their lifestyle will be difficult. When asked to share how they would spend an additional £7,500 with respect to energy, 32% suggested this would be used to pay energy debts and only 21% would use it to pay for a heat pump, 33% for solar. Most people (68%) would use an extra £7,500 to pay energy bills, whereas 43% would improve their central heating system[2].

There is a growing need to look at the engagement with younger people. Many have sustainable attitudes and habits but show a disconnect with respect to energy consumption. 48% of 18–24-year-olds are likely to feel they have put sustainability on hold since the cost-of-living increases[5].

### Core consumer needs remain consistent

We regularly track the key priorities of our consumers with respect to gas distribution, to understand how they change over time. In 2022, energy security was an emerging need in response to the Ukraine war. However, despite some new emerging consumer trends, as summarised below, there is consistency in what they value most from a gas grid. For many years reliability and safety have been the core need and this is consistently seen in feedback from consumers and businesses. We engage extensively with consumers during incidents causing gas outages, such as water ingress into the network. We consistently receive insight on just how much value consumers place on the additional support and care we provide to communities during these events.

In addition we see that topics such as sustainability, supporting the most vulnerable in society and improvements in customer service are all important needs for a consumer with respect to the role of the gas networks. All of these themes are therefore core to our business plan.

### Core consumer needs[7]

**1. Reliability**

59% of consumers rated this as important

51% of businesses rated this as important

**2. Energy security**

52% of consumers rated this as important

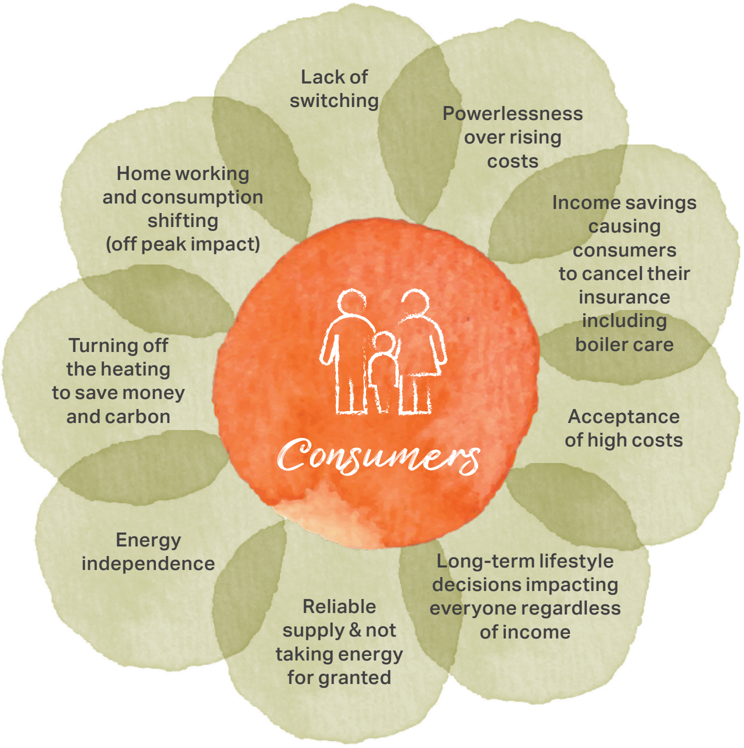
50% of businesses rated this as important

**3. A safe network**

45% of consumers rated this as important

40% of businesses rated this as important

### Emerging trends



Section 2

# How we are engaging with consumers

## 1. Turning insights into action

We have a dedicated Customer Insights team who use a wide range of techniques to ensure that the voice of consumers is heard, understood and fed into our governance and decision making framework. In 2023, we completed eight large scale consumer research projects, using a variety of methods exploring topics such as consumer vulnerability. sustainability, fuel poverty, change management and the energy transition.

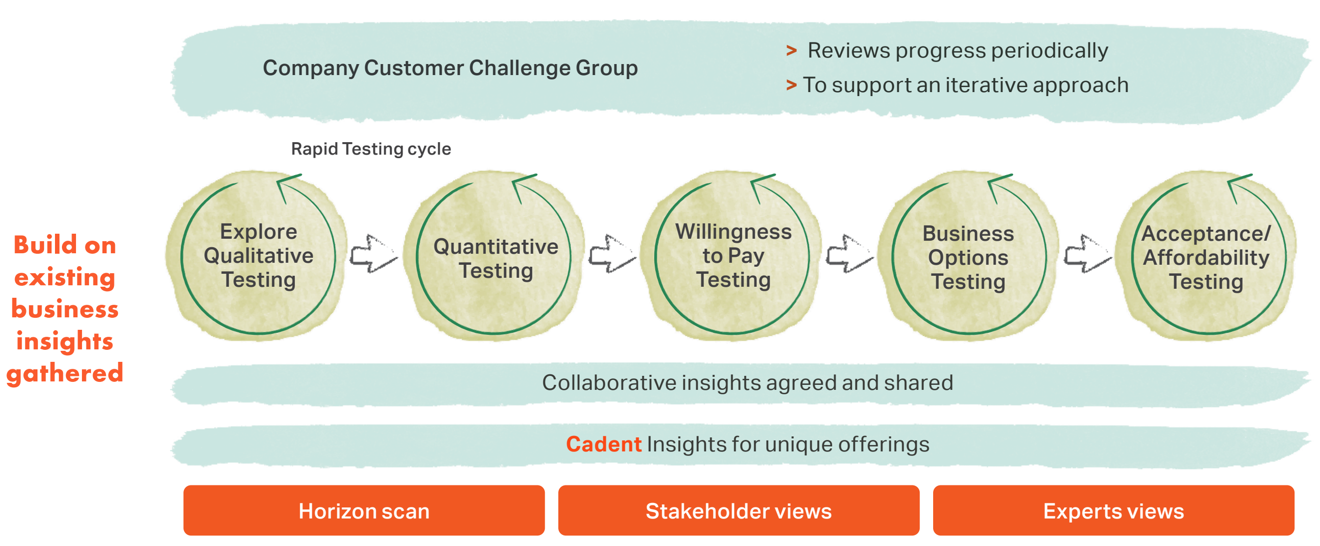
In 2024, we will submit our business plan for the next regulatory period, which will run from 2026 to 2031.

Over the next 12 months we will continue to look beyond and seek to track and understand consumers' thoughts on an ongoing basis to ensure that our plans represent their priorities, needs and expectations.

We use various testing methods to bring the voice of the consumer into our decision making processes in addition to our operational data which measures customer satisfaction across our core journeys. Our approach is set out in the following schematic.

### Our approach to customer engagement

This will build on our existing insights & deepen our understanding of consumer needs.



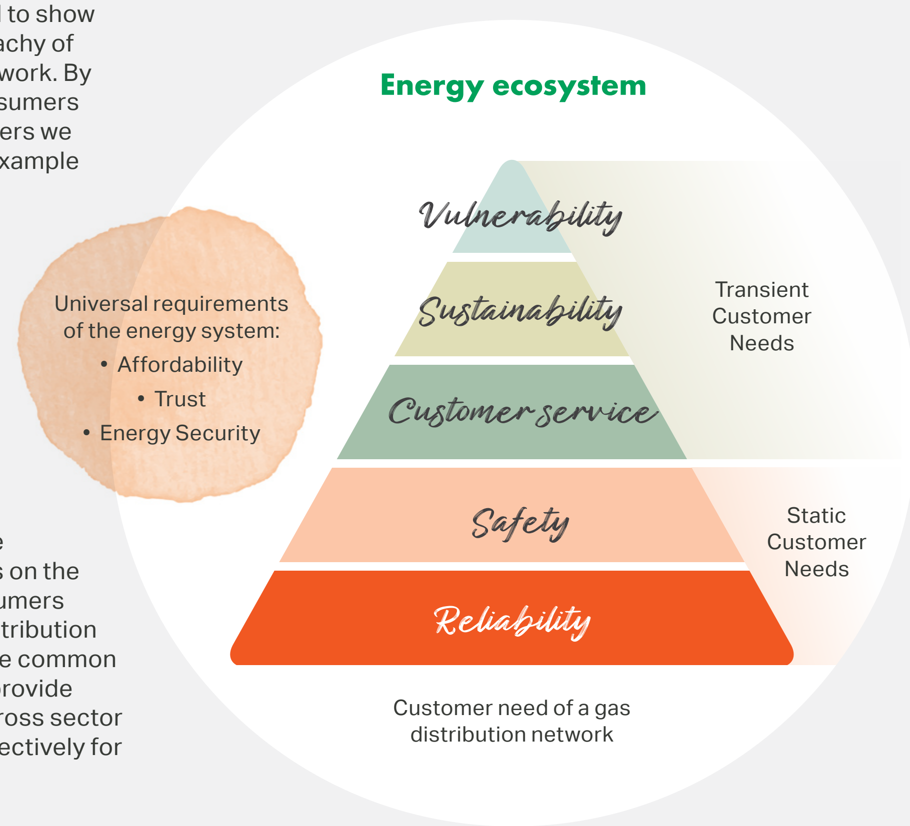

Our starting point will be to review our existing insight so we build on the data we have gathered to be more targeted on where we carry out new research. We will use the established, tried and tested process from RIIO-2, so we focus on generating new insights as opposed to 're-inventing the wheel' with changing the framework. We are committed to keeping a cost focus on insight gathered. As we progress in our business planning process, the relative priority of reliability, energy security and safety will be further researched and understood to create a consumer centric plan. The input from experts across the energy industry will be a vital to our work, particularly as consumers struggle to understand and pay for high bills. It is apparent from our research that many consumers find the role of gas distribution businesses confusing, which makes it more challenging to engage and introduce more complex topics. There is a clear need for deliberative research with good quality explainers. However, by gathering the views of experts and stakeholders, who support consumers more broadly, and combining this research with the views of consumers we will build a well evidenced plan.

In addition we will endeavour through our ongoing research in 2024, to evaluate the impact of emerging trends impacting consumers on our role as a gas network. Our horizon scanning work will enable us to envisage the changing needs of consumers relative to their core needs.



## 2. Continuing to evolve our understanding of consumers' needs

The accompanying diagram is a visual to show our current understanding of the hierachy of needs of consumers from the gas network. By undertaking further analysis with consumers and bringing in the views of stakeholders we will further define this hierarchy. For example we will explore the relative order of needs particularly for the topics Sustainability, Customer Service and Vulnerability which can impacted by circumstances, for example if you have had experience with Cadent. We have seen that the relative order of importance of customer service, sustainability and vulnerability move over time, hence the term 'transient' in the diagram. Therefore we will endeavour to enhance our understanding of changes the relative hierarchy of needs to ensure we focus on the right things. We also see that as consumers can be confused by the role of gas distribution versus the retailers that we all have the common goal across the sector to build trust, provide energy security and affordability so cross sector collaboration is key to deliver this collectively for consumers.




## 3. Ensuring we have appropriate testing across diverse consumer groups

Ensuring we have appropriate testing across diverse consumer groups will enable us to act in the best interests of all consumers.

**Understanding the needs of different consumer groups and tailoring solutions to meet them is vitally important, whilst Cadent serves some 11m domestic households, the heavy Industry that Cadent supports consumes more than 20% of gas demand. The intense heat that gas provides ensures that many household and industrial products, such as glass, ceramics and steel, can be produced in the UK, therefore supporting the UK economy and jobs.**

**Angela Love**
Chair of Customer Challenge Group

### Ensuring all consumer groups are fairly represented including vulnerability

Section 3

# Providing all consumers with a safe, reliable service

**This remains the highest priority for our consumers, with expectation levels on businesses like Cadent rising over recent years.**

**I don't think children take it as seriously as adults. They take it more for granted. It's hard with kids, mostly cause they're not paying for it.[5]"**

**Sophie**

### Exploring consumer expectations

Our ongoing research and engagement with consumers has informed us that when it comes to customer service, keeping the gas flowing remains a key focus, along with reducing the disruption felt when Cadent are completing necessary safety work. For this, consumers increasingly explain that communication with them is of utmost importance and we work with consumer groups and charities to ensure that our communications are clear and inclusive, using a range of channels.

With the changing external landscape comes changing consumer and stakeholder priorities and a need for us to continually engage to inform how we prioritise our consumer vulnerability support programmes and allocate funding. In 2022/23, we ran an in depth consumer research project called The Energy Diaries. This included our 'Energy Diaries' research, through which we asked consumers living in various degrees of fuel poverty to maintain a diary of their engagement with their energy solutions, their feelings, actions and motions over a period of several months, spanning the removal of the energy price cap in April 2022.

We worked with these consumers, along with a raft of expert stakeholders, including Groundwork UK, National Energy Action, Citizens Advice and numerous charities to feed into our future work programme and co-create a number of the initiatives that we subsequently launched. Our winter energy efficiency awareness package was one example of an initiative that was delivered as a direct result of the co-creation work.

Building upon the insights we have gained throughout the year; in May 2023 we reached out to a further 24,000 consumers from across the UK to gain feedback on our existing portfolio of projects[8]. This helped our understanding about future needs for consumers in vulnerable situations and how we can provide support now and into the future through the initiatives we fund. Using a targeted approach, we held in-depth conversations with consumers in vulnerable situations coupled with 15 in-depth conversations with existing partners, industry experts, local councils, and safeguarding experts[8].



68% of consumers surveyed were supportive of funding initiatives related to supporting consumers living in fuel poverty, or living in other vulnerable situations[8]. They felt that this was even more important now because of the unprecedented cost-of living levels. The insight presents a clear signal that expectation levels are to be socially focused, joining together initiatives to support the most vulnerable with those that help people be more sustainable, are higher than ever.

### Extending our services into homes

We have been working extensively with customers and stakeholders to inform the extension of the work we complete to support customers in vulnerable situations with services in their home. The feedback has reaffirmed the importance of the role that we play in this space, supporting the continuation of this work, with greater focus on energy efficiency.

**With elderly people it can mean life or death, if they haven't got the heating[9]"**

**Consumer Tameside**

75%

of consumers agree energy companies have a particular responsibility for protecting the most vulnerable in our society[2]

1.6 million

calls answered[8]

12%

of consumers have cancelled their boiler care

15%

have delayed changing boilers

### Responding to consumer feedback

The cost-of-living crisis has forced more people into fuel poverty and consumers have told us they expect more of the regulated consumer vulnerability financial allowance to be channelled into supporting people in this area. We have supported over five million of our consumers with a range of support initiatives, generating more than £300m in social value[8], with research showing that 70% of consumers want energy companies to support the most vulnerable in society to become sustainable and 79% want energy companies to take the lead on sustainability as they have the expertise[2].

### How we deliver for our consumers

Cadent (along with other GDNs) have a natural position of advantage when it comes to supporting customers in vulnerable situations. Cadent employees and contractors enter thousands of homes every single day, speak with tens of thousands more through our Customer Centre and engage with many more through our mains replacement programmes. This direct customer interaction, coupled with an inherent level of trust (as we do not sell anything directly to customers) and the fact that we train all of our front-line employees annually to identify and support customers in vulnerable situations, allows us to become the `eyes and ears' of society' in our daily operations.

Many of the consumers we have engaged with have struggled to balance what they have perceived to be mutually exclusive priorities; making their money go further and being greener. This conflict is something that they are keen for Cadent to play a leading role in. Consumers are happy to make the little changes to lifestyle to become 'green' but they also react positively to contributions from big business in tackling carbon emissions. They see everyone as accountable in supporting the environment and would like to see clear evidence of progress on claims made by businesses. It is important that homeowners do not feel they are alone in the energy transition and reducing emissions.

## Section 4

# Transitioning to a net zero future

**We acknowledge that in building on the needs of consumers to have a safe and reliable net work today our future business plans also needs to ensure that Cadent is ready to provide them with a net zero future. However, this will require changes to our business which we have already set in motion such as converting >90% of the network to plastic, reducing our greenhouse gas emissions and readying the network for a low emission gas future.**

There is clear recognition from a most of the consumers we have engaged with that they do not feel able to make the more sizeable investment households will need to make to decarbonise home heating. As we have reported earlier many homeowners are happy to make small changes to their lifestyle, but larger investments feel too costly for many right now.

The chart opposite shows how consumers would spend an additional £7,500 if it had to be used in relation to their energy usage. The public are primarily focused on paying their bills now and would typically use it to create more financial security in the short term, rather than invest in energy efficiency improvements for the longer term.

>50%

Consumers agree that being more sustainable is really important, but it just isn't a priority at the moment with the cost-of-living crisis[2]

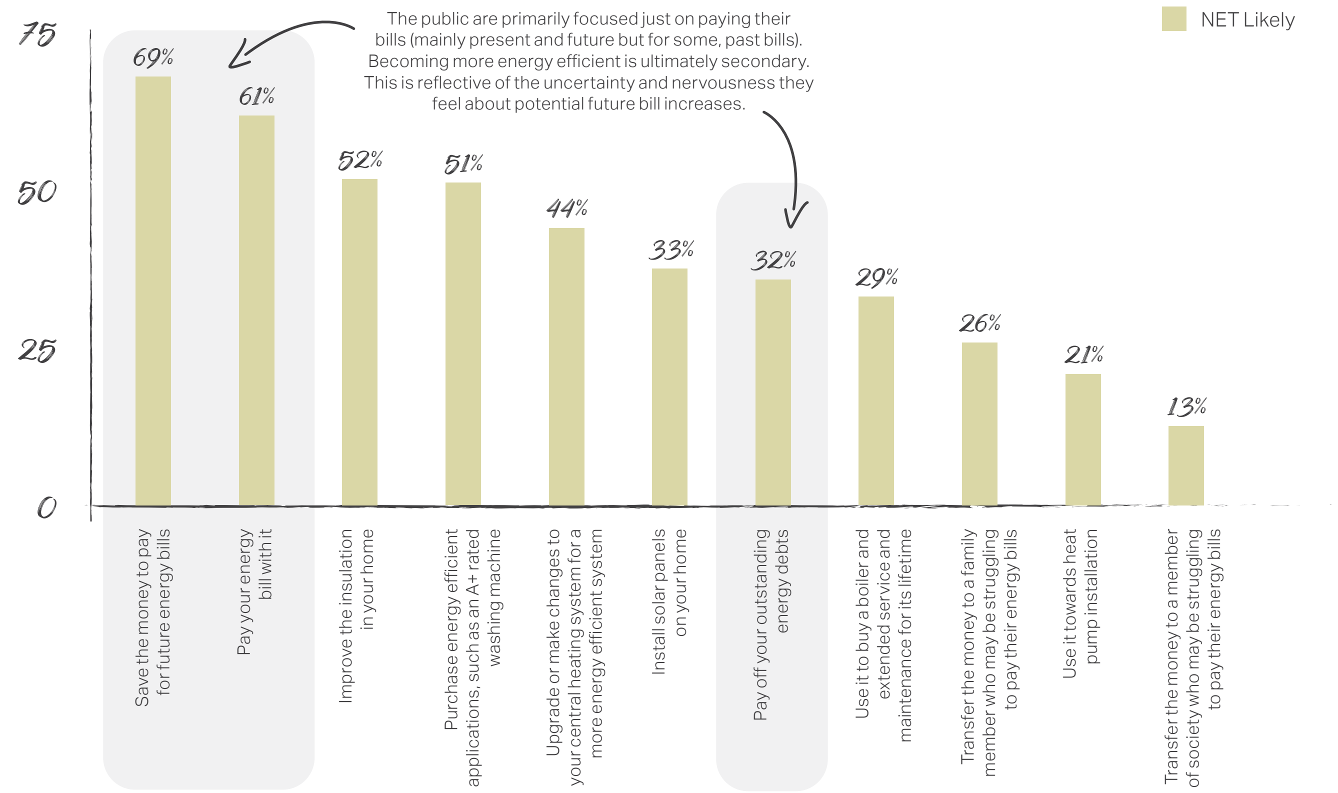
32%

agree that since the cost of living crisis I have had to put sustainability on hold[2]



**How £7,500 would be spent in relation to energy usage**

% ranking factor of top 3 selection




Public Quant Survey Wave 3: Finally, we'd like you to imagine that you were given £7,500 to spend in relation to energy usage. What would you do with this money? Base: All public (n=2,124)

Awareness is also low on the need for people to make significant change, and it is too soon for many consumers to relate to net zero goals with respect to home heating and what this means to making changes in their home (although it is accepted that early adopters are always present). Adoption levels of existing low carbon solutions remains low, although solar has seen an elevation in recent years.

The research that we completed in the run up to designing our approach to the proposed hydrogen village trial shows that many consumers, even after nine months of intense engagement, still felt they did not have enough information to decide on how to heat their homes in a net zero world. However, this positivity increased when the trial offered the option to remain on natural gas.

### Cadent must navigate short term needs whilst preparing for a net zero future

The findings support the need for today's gas network for decades to come, as technology advances and energy consumers become more aware of the need for change and feel more able to support these changes. Consequently our consumers continue to expect us to invest in the gas network to ensure the high levels of safety and reliability continue to be delivered, but that we invest further in the network to reduce our carbon footprint as a business. For Cadent and other GDNs, this means a greater focus is needed to reduce levels of gas shrinkage and leakage. We know from our research that consumers support our ambition to reduce methane leakage by greater than 30% by 2030 and we will be testing a range of ambition levels for the future.

In parallel we see a growing interest in future greener gases (biomethane, blending and hydrogen) but more information on what this means for consumers is required.

It is vital that the industry provides expertise in future alternatives, as 79% of consumers believe the energy industry has the expertise to respond to this[2]. Many respondents react positively when they hear about the option of repurposing the grid. One third of consumers want to stay the same but when they hear about the possibility to repurpose the grid interest grows in this as an option by 6%[10].

Section 5

# Preparing for the energy transition

**We will continue to play a leading role in supporting the UK Government's ambition to achieve net zero by 2050. For us, this means determining the future role of gas, helping to explore and enable low carbon alternatives such as hydrogen through a range of industrial and domestic trials and projects.**

## Early reactions to trialling

Many consumers have reacted well to the idea of trials - 63% consumers and 78% of businesses[7] - but when it comes to the practicalities and the implications of change, there is some reluctance.

It could be seen from a consumer's perspective to be too soon to make decisions with respect to adopting new low carbon heating. Consumers want detail when there is major change, particularly with respect to long-term aftercare, running costs and safety. Joint government campaigns like 'Stay at Home, Save Lives' during the pandemic demonstrated the importance of the need to change, which in turn drives momentum to major lifestyle changes with a disruptive element. In transitioning >80% of domestic homes to low carbon solutions, a communication approach of this nature would be beneficial[1].

**Hydrogen demand for Industry is growing**
For businesses hydrogen demand is growing Already. To date more than 30 industrial and commercial organisations have requested that we supply them with hydrogen for heat. These large organisations have a high heat demand which is intense in nature, supplies must be resilient for the businesses to operate, down time will cause significant commercial loss. Compliance requirements for cleaner production add a clear incentive to drive the transition to lower carbon emissions.

**Engaging with future generations will be key**
Our research over the past two years has shown us that we and others must invest more time in educating and inspiring the younger members of society as decisions makers and leaders of future Britain. We've noted that the cost-of-living crisis has frustrated younger individuals more than any other consumer group and in doing so has disconnected them the most from energy.

We were surprised to see that 18–24-year-olds are more likely to be in debt from the cost of living but are also more likely to want to support others in need with additional funds[3]. Education relating to the energy transition can start with this group of advocates and future decision makers. As such we should continue to invest in the channels they learn from, particularly digital and social, and ensure that quality information is available through trusted sources online. This will help to bridge the low levels of trust that many place on the existing online content that consumers have access to. Additional research showed that 30% of social media content related to net zero raises concerns about credibility of sources references 'hoax' or 'lies'[11]. Trusted content online is required for consumers to inform and enable decision making.

**Exploring the parameters required to facilitate net zero change**
In late 2023, we initiated a study with leading UK and European behavioural scientists to assess the extent to which UK residents are more resistant to large scale change than those of other European nations. The initial results from the study have concluded that all people are highly adaptable to change, but it has pointed to a number of key structural and societal conditions that must be in place to enable mass change. These include clear decision making, and easy to understand rationale for a change, including the benefits that are expected.



*In a recent study on Net Zero change resistance four elements were identified for successful change*

- *Leadership*
- *Infrastructure*
- *Communication*
- *Role of the Individual*



## Choice and collaboration

Consumer choice is important. Many consumers like to make informed choices and the most vulnerable need a way to make decisions with support. All consumer groups would like independent advice and information presented simply and generally awareness of various in-home solutions is low - heat pumps 26%, hydrogen boilers 13%, district heating 24% and biomethane 21%[7]. If choice is taken away, we believe detailed evidence is required for trust building, particularly if change is mandated.

To protect consumers in the energy transition, collaboration across the industry is advisable. Trust is a challenge that unites the industry. Therefore we need to give consistent messages from across the industry to build consumer and stakeholder trust. Gas and electricity networks could have an opportunity over the retailers who are more commercially driven in the eyes of the consumer. Our learning from the village trial show that if the industry approaches consumers with conflict, the default option is to 'stay the same'.

**We're concerned about our future generations' wellbeing but it's on the scales with our finances.[9]"**

**Birmingham**

Section 6

# Turning insight into action, now and in the future

## Value for money

Energy consumers have seen prices go up and they don't fully understand why. When we explain how Cadent's costs are represented in their energy bills, they typically see network costs as value for money, but this must not be compromised by any reduction in the core expectations of safety, reliability and customer service.

## Reliability and resilience

These factors remain of critical importance to consumers, but they accept that 99.99% network reliability is very high. With the war in Ukraine, consumers are increasingly concerned with energy resilience and are keen to support ways to support energy security, including increased 'home grown' gas, such as that produced through biomethane.

## Sustainability

Our customers are keen to become more sustainable and have implemented a number of 'micro-changes' to their behaviours, mainly in an attempt to reduce their energy usage to save money. Most can not afford to make bigger changes and expect large businesses, like Cadent, to play a role in helping them to become more sustainable.

They expect Cadent to have a clear plan to decarbonise its business and are supportive of the improvements that have been made as part of our Environmental Action Plan. They expect us to enhance this plan during the next regulatory price control period.

## Transitioning to net zero

We will listen to consumers and play a significant role in enabling a transition to low carbon heating in the UK.

However, for this change to be successful, a combination of strong leadership, clear targets and a much stronger case for change must be articulated at a national level.

UK consumers are not inherently more resistant to change than other nationalities, but there is a low level of engagement with options and more certainty is required before there will be mass adoption of new technologies.

## Customer service

Customers regularly score Cadent's core services at over 9/10. However, customers see improvements in digitalisation and automation from other industries and expect continual improvement from their gas network too.

Customers place a large reliance on the support we provide to customers living in vulnerable situations and there is strong support to our continued role in this area, especially in relation to the cost of living crisis.

## Next steps for enhanced engagement

We will explore more strategic themes to ensure future plans consider the changing context of people's lives. In 2024 we are planning to deliver a series of comprehensive research projects, including:

- What are the expectations of consumers from a gas network business in the immediate term, including how much are they willing to pay them?
- What are the views of expert stakeholders compared to consumers?
- How important is choice to consumers for changing their heating?
- Do people believe their gas central heating will need to be changed?
- Do people feel the government will be prepared to enforce change?

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