

# Decarbonising heat insights

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# Cadent is the UK's largest gas network



- Cadent connects 11 million homes in the UK with gas
- It covers over 50% of the country
- Is divided into 5 regions
- Supplies gas to large industry as well as households
- Drives on customer vulnerability



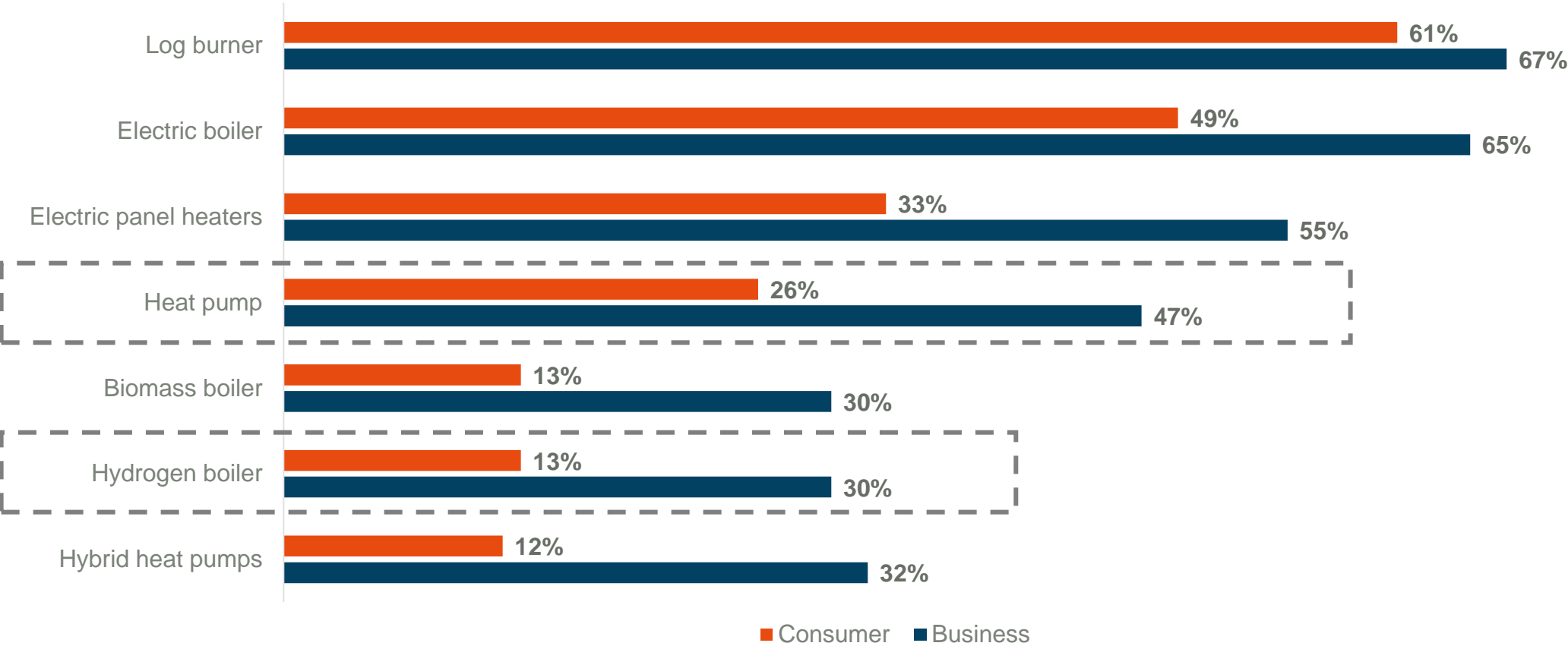






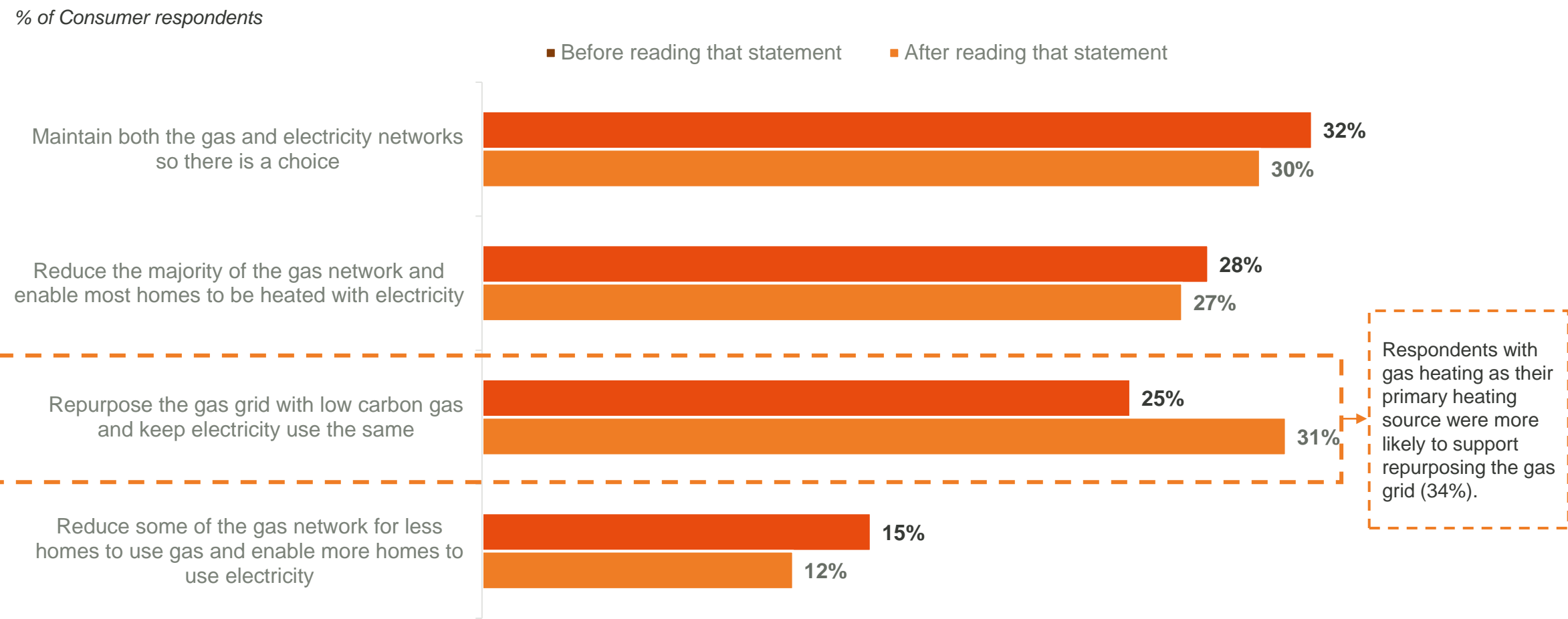
# The consumer awareness of low carbon home heating solutions is low

% those have a good understanding of what it is – split by consumer and business respondents



Q8. How much do you understand about the following ways of heating your home and providing hot water? BASE: All **Consumer** respondents (5067); All **Business** respondents (501)

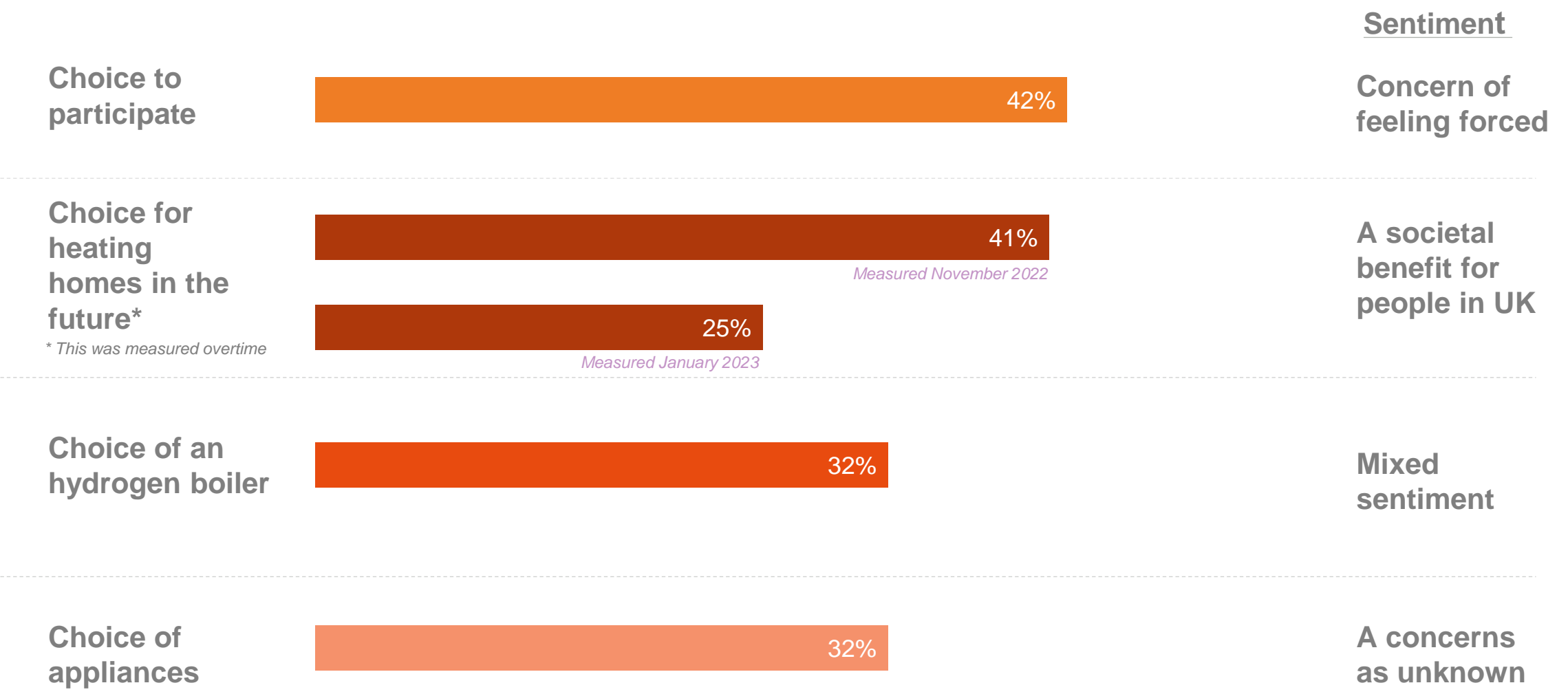
# 1/3 of consumers want to maintain the status quo but when informed about the option for repurposing the gas grid interest grows



Q9. In order to get ready for the UK's move away from natural gas boilers, there are different options about what can be done with the existing gas network and electricity grid. Which of the following do you think is best for the UK? BASE: All Consumer respondents (5067)

Q10. Having read that statement, which of the following do you think is best for the UK? You can select the same answer as previously or select a different one. BASE: All Consumer respondents (5067)

# Consumer choice is important & can be viewed in many ways, where the Whitby residents shared their views on various aspects of choice



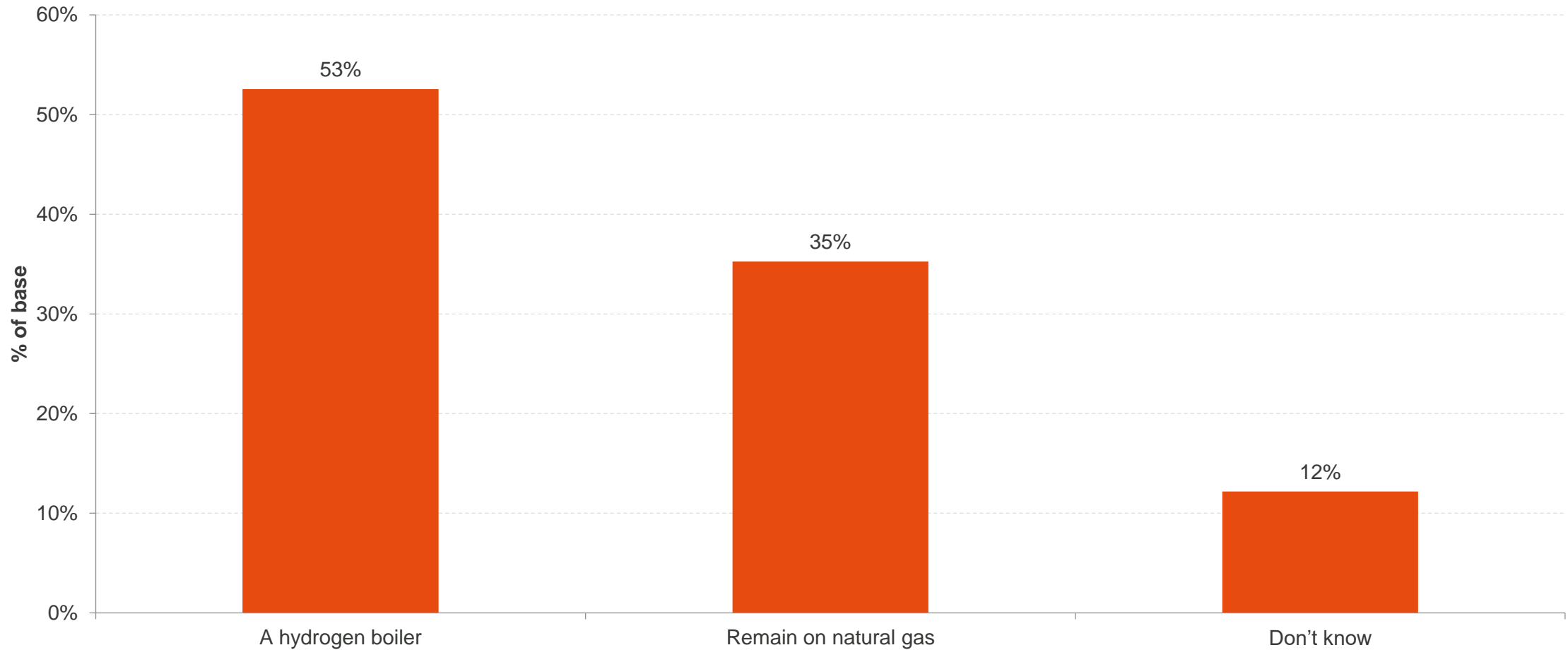
Ongoing research will look at change & choice for consumer to develop a deeper insight

# Positivity was driven by environmentalism and being part of the future while negativity was driven by feeling forced, concerns over safety & cost

Reasons for positivity and negativity



# In response to the feedback from residents we acted and changed the offering to include the option to stay on natural gas



Sample size: n = 156 | Base = Respondents who saw the question | Q = "If the Whitby Hydrogen Village Programme was to go ahead, what would you have preferred for your primary heating system?" (Single choice)



# Heat decarbonisation universal ingredients for success

## Consumer-led ingredients

1. An energy supply that matches demand
2. A grid that is sized for heat in all eventualities
3. Insulated homes compatible with a future heating system
4. Solutions for all types of consumers
5. Consumers willing to change their homes
6. Consumers willing to pay
7. Consumers get to choose when they switch
8. Benefits/incentives for all types of house tenure



**Thank you !  
Hydrogen.... the Journey  
towards net zero  
continues....**

