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

- Log burner: Consumer 61%, Business 67%
- Electric boiler: Consumer 49%, Business 65%
- Electric panel heaters: Consumer 33%, Business 55%
- Heat pump: Consumer 26%, Business 47%
- Biomass boiler: Consumer 13%, Business 30%
- Hydrogen boiler: Consumer 13%, Business 30%
- Hybrid heat pumps: Consumer 12%, Business 32%

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.

<table>
<thead>
<tr>
<th>Choice to participate</th>
<th>42%</th>
<th>Concern of feeling forced</th>
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<tbody>
<tr>
<td>Choice for heating homes in the future*</td>
<td>41%</td>
<td>A societal benefit for people in UK</td>
</tr>
<tr>
<td>Choice of an hydrogen boiler</td>
<td>32%</td>
<td>Mixed sentiment</td>
</tr>
<tr>
<td>Choice of appliances</td>
<td>32%</td>
<td>A concerns as unknown</td>
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* This was measured overtime

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**

- **42%** Good for environment
- **27%** It's the future/inevitable/move with the times
- **15%** Need to move away from current fuels
- **15%** Generally positive
- **14%** Exciting/new things/tech innovation
- **5%** Good offer/financial incentive/new appliances
- **5%** Good communication

- **42%** It has been forced upon us
- **25%** Safety
- **22%** Cost implications
- **10%** House prices
- **11%** Not enough information
- **7%** Part of an experiment
- **7%** Skeptical of "green" credentials of hydrogen
- **5%** Do not want to be part of this trial

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Q26. You said that you feel [positive/negative] about taking part in the Hydrogen Village Programme. Please can you explain why you feel this? Base: All TP2 positive (113) negative (383) *The percentage is calculated based on each Positive & Negative bases. Survey was closed to residents in Jan 2023.*
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...