Heatropolis Primary Research Report

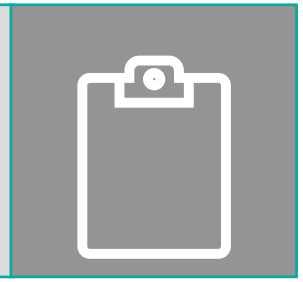
Metropolitan, Passiv UK, Guidehouse and UK Power Networks

Prepared by Impact Research

Executive Summary

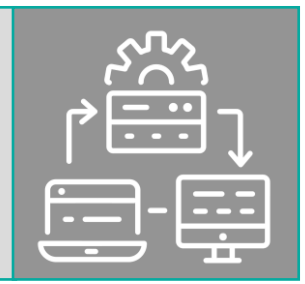
Executive summary

Context
Heatropolis is pioneering commercial and technical solutions to create smarter, more flexible heat networks. This research aims to conduct primary market research on residential and commercial heat network customers. The research has gathered insights into their experiences being heat network customers and willingness to participate in flexibility.



Customer experience, trust and communication
Customers' satisfaction with their heating systems varies. Many cite reliability and comfort, while others highlight frustration with costs, unclear billing, and inconsistent performance. Trust in operators is closely linked to communication quality, limited updates or unclear messages often lead to reduced confidence and perceptions of poor service.

Openness to flexibility and data sharing
Customers are generally open to flexible heating and data-driven management when the benefits are clear and data is handled responsibly and transparently. Cost savings are the strongest motivator for engagement, while community or innovation-led appeals have less influence. Many are willing to share usage data if they understand how, it will be used and trust that operators will handle it responsibly.



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Research Background and Methodology

Notes and definitions

Acronym	Definition
SEG	Socio-Economic Grade - Socio-economic classification produced by the ONS (UK Office for National Statistics)*
T3B	Top Three Box – NET of the three highest points on the scale
B3B	Bottom Three Box – NET of the three lowest points on the scale

The following groups were looked at when conducting sub-group analysis:

- Age
- Region
- Time at current property
- Home ownership
- Household vulnerabilities and registration on a PSR service
- SEG
- Children in household
- Fuel poverty

On some charts in this report, we show differences between sub-groups where these are statistically significant. Where no sub-group differences are highlighted, no statistically significant differences were found. All significance testing has been conducted at the 95% confidence level.

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*Please see the next slide for full definitions of each Socio-Economic Grade

Notes and definitions: Socio-Economic Grade

Acronym	Definition
SEG A	Higher managerial/ professional/ administrative (e.g. Doctor, Solicitor, Board Director in a large organisation 200+ employees, top level civil servant/public service employee etc.)
SEG B	Intermediate managerial/ professional/ administrative (e.g. Newly qualified (under 3 years) doctor, Solicitor, Board director of small organisation, middle manager in large organisation, principal officer in civil service/local government etc.)
SEG C1	Supervisory or clerical/ junior managerial/ professional/ administrative (e.g. Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc.) or Student
SEG C2	Skilled manual worker *(e.g. Bricklayer, Carpenter, Plumber, Painter, Bus/ Ambulance Driver, HGV driver, pub/bar worker etc.)*
SEG D	Manual *worker (e.g. Caretaker, Park keeper, non-HGV driver, shop assistant etc.)*
SEG E	Casual worker – not in permanent employment or Housewife/ Homemaker or Retired and living on state pension or Retired and not living on state pension or Unemployed or not working due to long-term sickness or Full-time carer of another household member

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Background and objectives

OBJECTIVE:

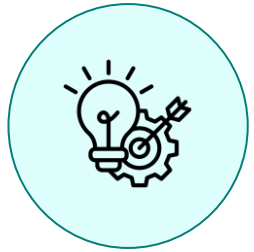
Gather insights from residential and commercial heat network customers on their experiences, perceptions, and concerns to inform the design of the Heatropolis trials, which will test various heat network commercial arrangements, smart controls, and thermal storage solutions.

01

Customer insights:

- Understand Customer Experiences
- Assess Service Perceptions
- Evaluate Flexibility & Smart Controls

02



Application:

- Inform Trial Design
- Optimise Customer Experience Support Net Zero Transition
- Influence Policy & Business Models

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Method

- 15-minute survey, consisting of quantitative closed questions and open-ended responses.
- All respondents were customers of heat networks.
- Before the research began we conducted desk research to identify databases containing postcode-level heat network data. This then formed the sample for non-Metropolitan[1] customers.

Postal to online

- Letters were sent to the addresses of non-Metropolitan heat network customers.
- Each letter contained a QR code linking to the survey.
- A prize draw was conducted to incentivise participation.
- **We received n=474 respondents from letters**.

Email to online

- Email invitations were distributed to Metropolitan customers.
- A prize draw was conducted to incentivise participation.
- **We received n=85 respondents from email distributions.**

Computer assisted telephone interviewing (CATI)

- **n=360** Telephone interviews with non-Metropolitan heat network customers

Before the survey was launched we conducted **n=5 cognitive interviews** to test understanding of the questionnaire. This ensured questions were clear, easy to follow, and interpreted consistently by respondents

[1]Metropolitan are a Heat Network Operator and a project partner on the Heatropolis project

Sample and Demographics

We spoke to a range of heat network customers. The figures below outlines key demographic data of respondents. Unweighted bases are shown throughout. All significance testing is conducted at 95% confidence level.

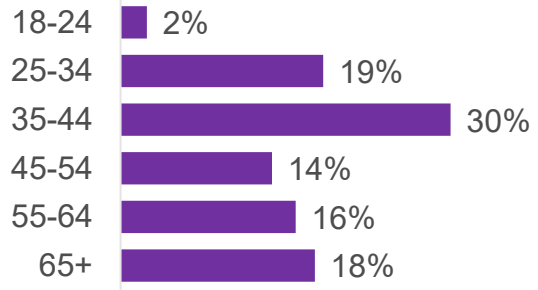
Gender[1]:

Male: 44%

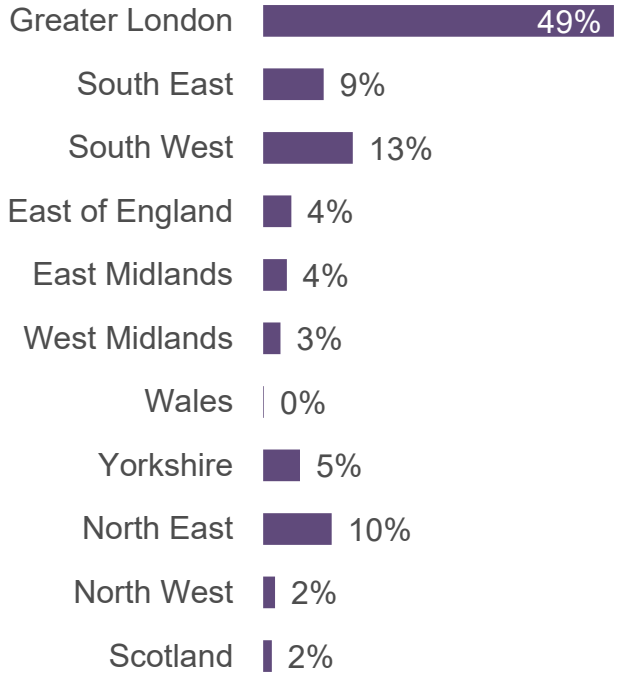
Female: 53%

***Non-binary + Prefer not to say**: 3%*

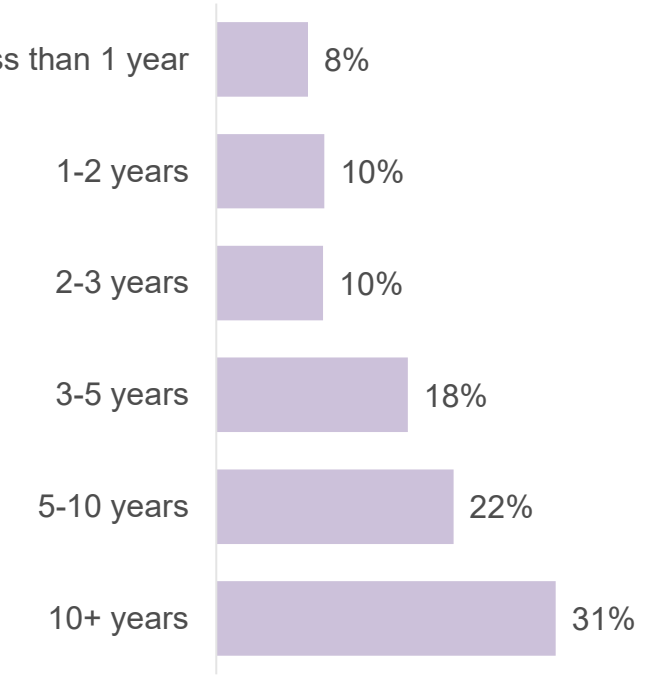
Age[2]:



Region[3]:



Length of time at property[4]:



[1]Which of the following best describes your gender? Base size: 918. Non-binary=1%, Prefer not to say=2%.
[2]Which of the following age bands do you fall into? Base size: 918. Prefer not to say=1%.
[3]Which of the following best describes the area where you live/ your organisation or business is based. If you are spread over several sites, please answer thinking of the site connected to the heat network IF SME CUSTOMER]? Base size: 919
[4]For how long have you have you lived at your current property/has your business been based at the current premises? Base size: 918

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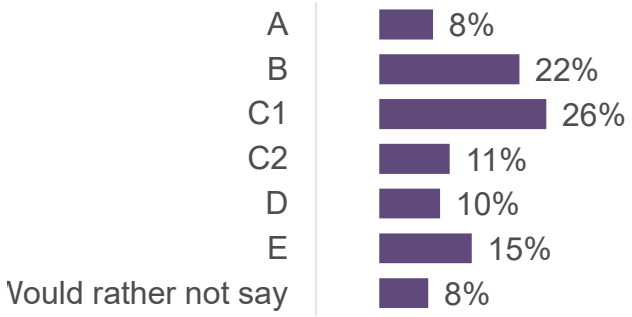
Sample and Demographics

Unweighted bases are shown throughout. All significance testing is conducted at 95% confidence level.

SEG:



Vulnerability:

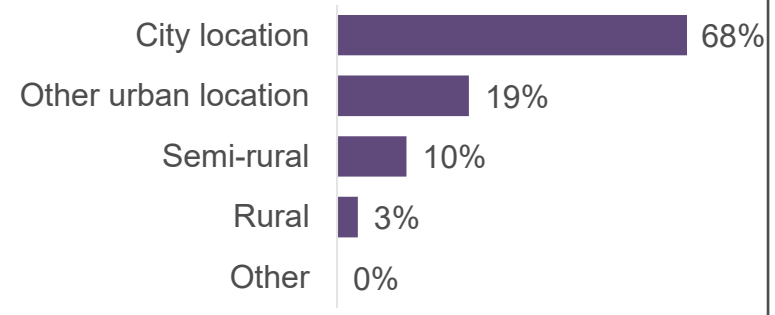
	Respondent	Others in household
Some vulnerability	34%	23%
None of the above	60%	72%
Prefer not to say	6%	6%

Fuel Poor:

Never struggle to pay energy bills and don't have to think much about energy use	24%
Don't struggle to pay energy bills, but I do need to manage my energy use carefully	40%
Sometimes struggle to pay energy bills but usually manage to keep on top of them	25%
Struggle to pay energy bills and often fall behind on payments	3%
Always struggle to pay energy bills and nearly always behind on payments	3%
Prefer not to say	6%

Fuel poor = 6%

Location:



Home ownership:

Private homeowner	38%
Private tenant	15%
Housing association tenant	22%
Council tenant	21%
Other	3%

P5: We are looking for a range of different people to take part in our research. May I ask Which ONE of the following categories best describes the employment status of the Chief Income Earner (CIE) in your household?/ P6: Which ONE of the following categories best describes the employment status of the Chief Income Earner before they retired? Base size: 918. Prefer not to say= 8%
P9: We would like to understand a little more about how your household's financial situation is affected by your energy bills. Which of the following statements best describes your situation? Base size: 918. Prefer not to say= 6%.
S7: Please can you confirm where you live/ organisation or business works? Base size: 918.
P2A: Which of these best describes your home situation? Base size: 918
P10: There are a wide range of factors that could mean anyone might need extra help or support from their heat network provider during a heating or hot water supply interruption. Base size: 918

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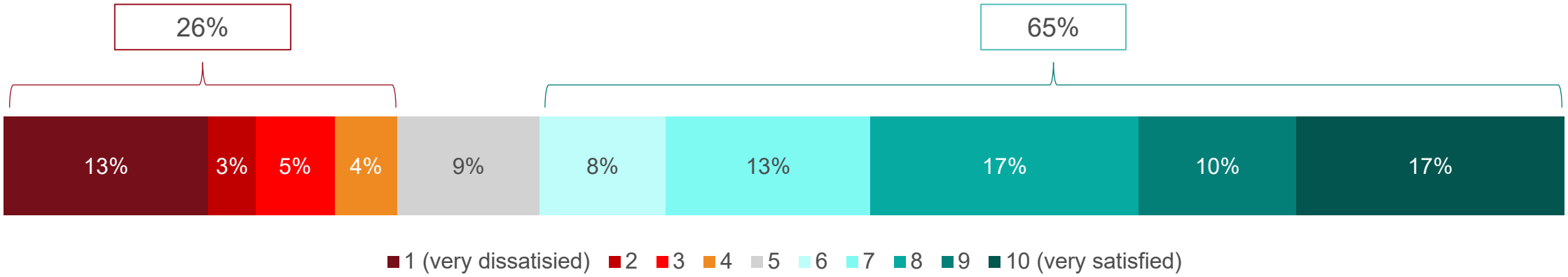
Customer Experience with Heating Systems

Satisfaction with heating and hot water system

65% are satisfied with their heating and hot water system while 26% are dissatisfied, driven by high costs, lack of transparency, and inconsistent service. Satisfaction is mainly due to the system working reliably rather than offering added benefits.



Reasons for dissatisfaction with current heating system:

- Perceived high or unfair costs
- Outages or interruptions
- Lack of control
- Poor communication and service

Reason for satisfaction with current heating system:

- Affordable
- Reliable / never had issues

E1A: On a scale of 1 to 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with your home/ business heating and hot water system overall? Base size: 919. (Don't know= 1%)
E1B: Why do you say that?

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Satisfaction with heating system – significant subgroup differences (versus total level results)

Those in **North England** are more likely to be satisfied (T3B) with their heating system than the total (61% vs 44%)

Those in **London** are less likely to be satisfied (T3B) with their heating system than the total (37% vs 44%)

Council tenants are more likely to be satisfied (T3B) with their heating system than the total (52% vs 44%)

Those who **often/always struggle to pay bills** are less likely to be satisfied (T3B) with their heating system than the total (30% vs 44%)

Private homeowners are less likely to be satisfied (T3B) with their heating system than the total (38% vs 44%)

Base sizes: North England: 158, London: 449, Often/always struggle to pay bills:54, Private homeowners: 353, Council tenants: 190

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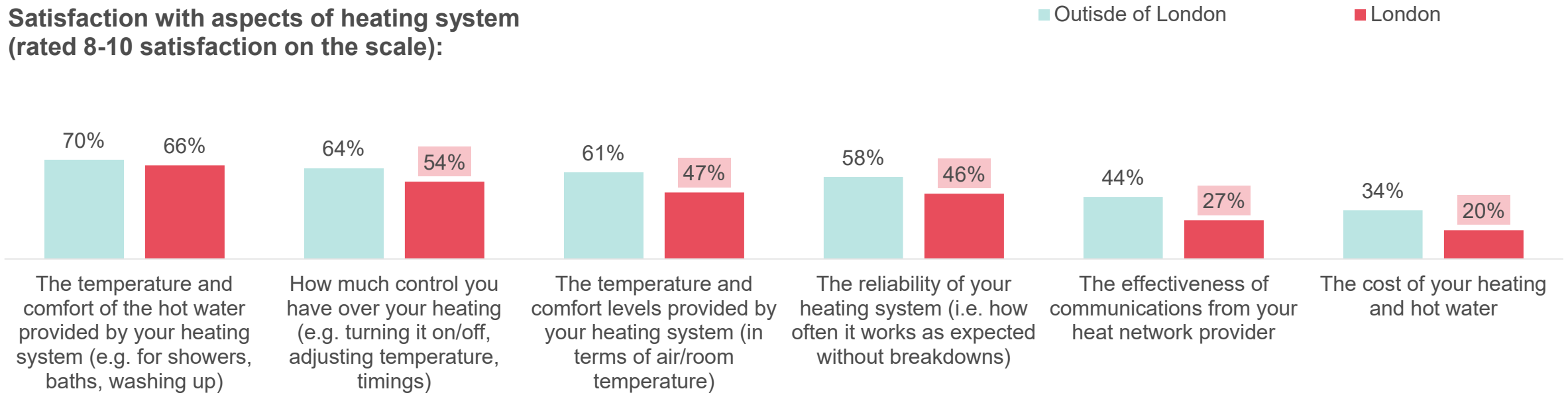
Satisfaction in London – Deep dive

Those in London were less likely to be satisfied with all aspects of their heating system. The biggest areas for concern are the effectiveness of communications and the cost of heating and hot water (which are also the aspects with the lowest satisfaction outside of London). This could be a result of the lower trust levels seen in London, as well as the greater prevalence of private homeowners who completed the survey.

Satisfaction with aspects of heating system (rated 8-10 satisfaction on the scale):



London under indexes on:

- Likelihood to trust networks operators to use data responsibly (8%) than those outside of London (14%)

London over indexes on:

- Private homeowners (46%) vs 31% outside of London. This group is also less likely to be satisfied with their heating and hot water (38%) than the total (44%).

E2: And using the same scale, how satisfied or dissatisfied are you with each of the following aspects of your home/ organisation or business heating and hot water system? Base sizes, Outside of London: 470, London: 449.

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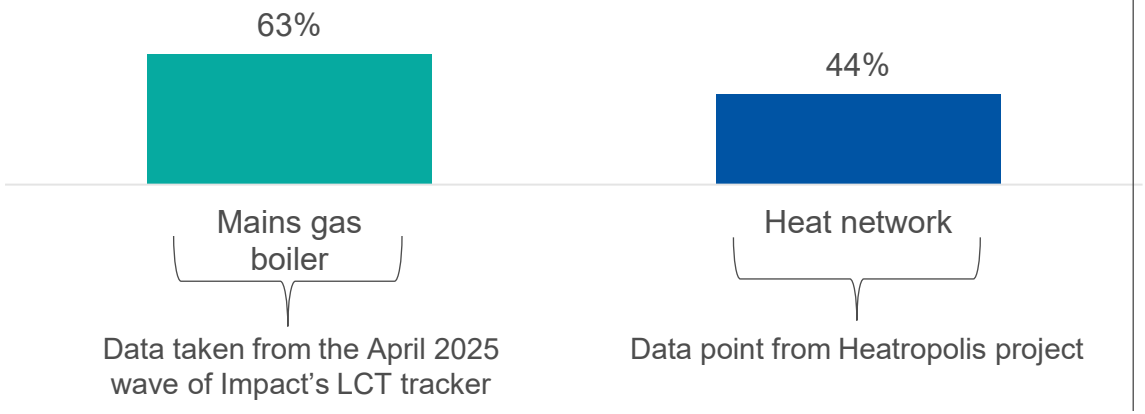
Benchmark for satisfaction

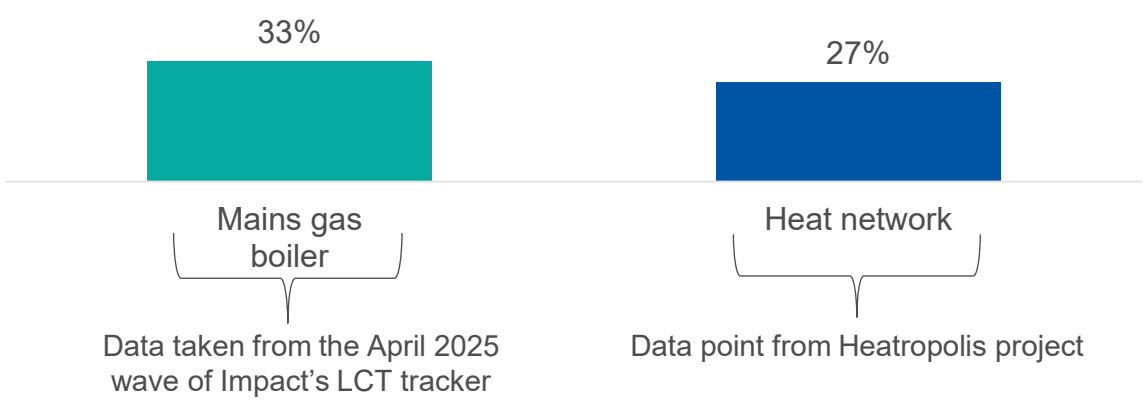
Heat-network customers report **lower overall and cost satisfaction** vs mains-gas boiler users (Low carbon technology (LCT) tracker).

***Please note**: Both questions used the same scales; however, mains gas boiler satisfaction was asked in the context of a heating system, whereas heat-network satisfaction was asked in the context of a heating and hot water system.*

Satisfaction with current heating system (rated 8-10 satisfaction on the scale):



Satisfaction with cost of heating system (rated 8-10 satisfaction on the scale):



Impact's LCT Tracker is a twice-yearly syndicated study for DNOs and GDNs tracking adoption and attitudes to EVs, heat pumps and solar. Fieldwork uses a nationally representative online sample of 1,000 Great Britain consumers, with optional subscriber boosts by DNO/GDN area to enable robust regional analysis.

From LCT Tracker: What is the primary source of heating used in your home? How satisfied or dissatisfied are you with your current heating system? Please give a score on the scale below, where 1 is very dissatisfied and 10 is very satisfied.
Base: (1,009) Mains gas boilers: 743

Heatropolis: E1A: On a scale of 1 to 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with your home/ business heating and hot water system overall?
Base size: 919. (Don't know= 1%)

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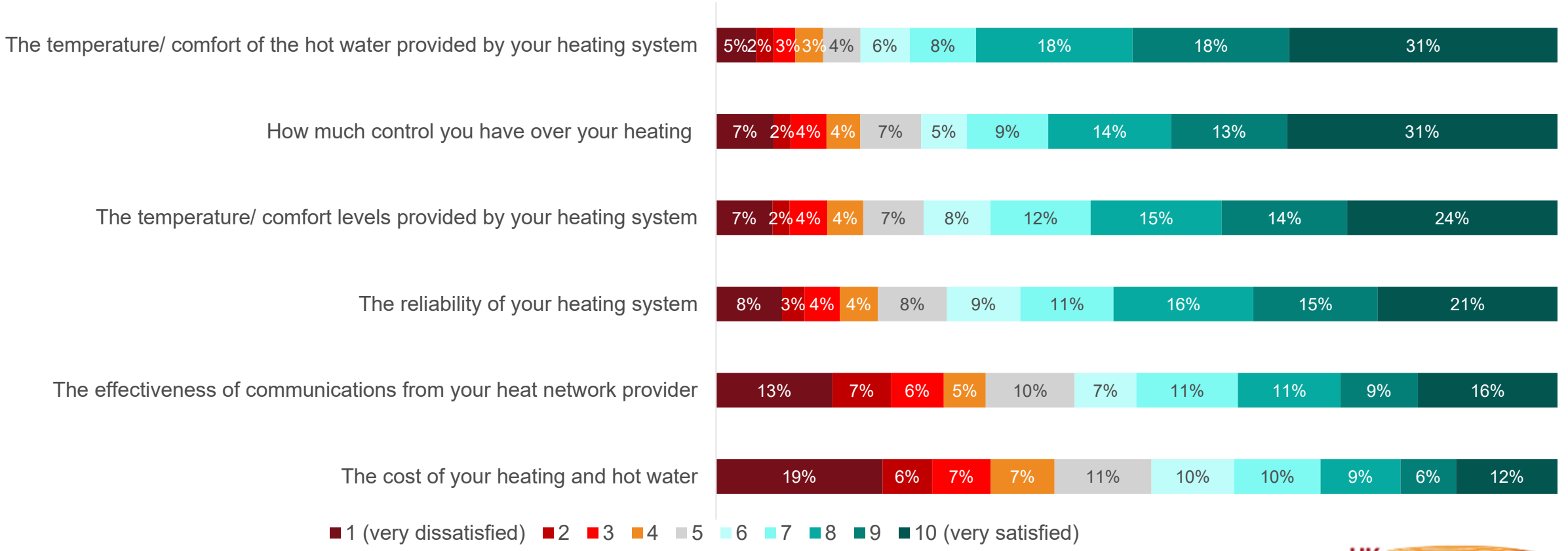
Satisfaction with specific aspects of heating system

Respondents are most satisfied with the temperature and comfort of the hot water provided by their heating system, and the control they have over their heating system. Dissatisfaction is highest for the cost of heating and hot water.



E2: And using the same scale, how satisfied or dissatisfied are you with each of the following aspects of your home/ organisation or business heating and hot water system? Base size: 919.
(Don't know: The temperature and comfort levels provided by your heating system= 3%, The temperature and comfort of the hot water provided by your heating system= 2%, How much control you have over your heating= 2%, The reliability of your heating system= 2%, The cost of your heating and hot water= 3%, The effectiveness of communications from your heat network provider= 6%.)

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Satisfaction with specific aspects - significant subgroup differences (versus total level results) (1)

Those **Aged 35-54** are less likely to be satisfied (T3B) with the cost (22% vs 27%) and communication (30% vs 36%) than the total

Those **Aged 55+** are more likely to be satisfied (T3B) with reliability (60% vs 52%), cost (37% vs 27%) and communication (45% vs 36%) than the total

Those who **often/always struggle to pay bills** are less likely to be satisfied (T3B) with the temperature/comfort of heating (33% vs 54%), temperature/comfort of hot water (43% vs 68%), control (41% vs 59%) and reliability (31% vs 52%) than the total

Those **in South England** are less likely to be satisfied (T3B) with the cost (22% vs 27%) and communication (30% vs 36%) than the total

Those **in Central England** are more likely to be satisfied (T3B) with the control (74% vs 59%), reliability (67% vs 52%), cost (41% vs 27%) and communication (46% vs 36%) than the total

Base sizes: Aged 35-54: 404, Aged 55+ 310, South England: 646, Central England: 97, Often/always struggle to pay bills:54

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Satisfaction with specific aspects - significant subgroup differences (versus total level results) (2)

Council tenants are more likely to be satisfied (T3B) with the cost (37% vs 27%) and communication (46% vs 36%) than the total

Private homeowners are less likely to be satisfied (T3B) with the cost (20% vs 27%) and communication (28% vs 36%) than the total

Those with adults 65+ in the household are less likely to be satisfied (T3B) with the cost (39% vs 29%) than the total

SEG AB are less likely to be satisfied (T3B) with the cost (21% vs 27%) and communication (27% vs 36%) than the total

Those with children in the household are less likely to be satisfied (T3B) with the temperature and comfort of hot water (60% vs 68%) than the total

Those living in a property for 10+ years are more likely to be satisfied (T3B) with the cost (33% vs 27%) than the total

SEG DE are more likely to be satisfied (T3B) with the cost (39% vs 27%), communication (46% vs 36%) and reliability (60% vs 52%) than the total

Base sizes:, Private homeowners: 353, Council tenants: 190, SEG AB: 281, SEG DE: 222, Children in household: 248, 65+ in household: 141, Living in the property 10+ years: 289

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Changes/ improvements to heating system

While many respondents (24%) noted they did not want to change anything about their current heating system, there were some key themes which are listed below.

Simpler controls and easier temperature adjustment

"I would like the temperature thing to be easier to use. It's got four different buttons and it's confusing for me."

"Better control of the heating and the ability to reduce or turn it off to save money. Also. when filling the bath, I sometimes run out of hot water."

"To have better control on adjusting the temperature on the radiator."

More reliable and better performance

"The thermostat seems unreliable in that the temperature shown doesn't tally with how it feels."

"It needs to be reliable all the time, and it needs to be cheaper."

"Reliability of these systems needs to be much improved also. Management pricing needs to be much more transparent. There is a real concern around lock-in, as we cannot change our provider"

Wanting homes to feel warmed and more evenly heated

"Radiators that can give me proper heat as I get quiet poorly through winter."

"We have to pay all year round, but obviously don't use it in the summer, but still pay the same amount."

"How long it takes to heat up and how rubbish it is at making a room warm."

Cheaper and more energy efficient system

"I'd like it to be cheaper. I don't know enough about it as a system, I think it's been in since the 70's and was only meant to be for 150 homes but there's 600 houses now."

"Just warmer showers really, the rest works well enough for me."

"Reduce the daily fee for smaller households / low usage."

E4: What, if anything about your heating system would you like to change or improve? Base size: 919

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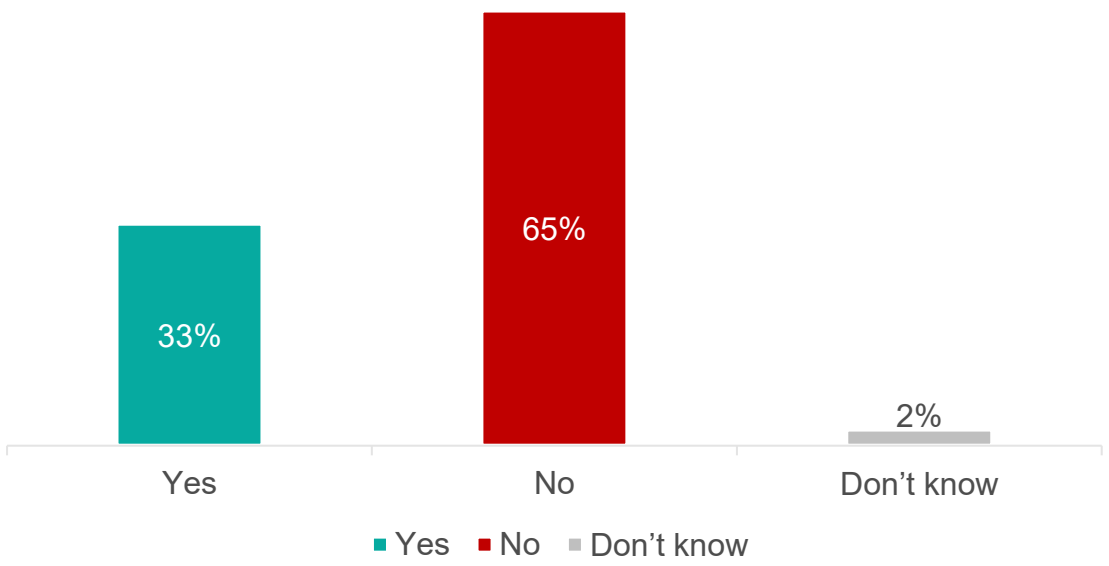
Flexibility and Smart Controls

Smart controls usage

1 in 3 people currently use smart controls. This figure is higher among SEG A.

Currently using smart controls (control (e.g., thermostat app, digital timer, remote control):



Subgroup differences (versus total level results):

- Those **aged 55+** are less likely to be using smart controls (26%)
- Those in **SEG A** are more likely to be using smart controls (46%)
- Those in **SEG E** are less likely to be using smart controls (23%)
- **Private homeowners** are more likely to be using smart controls (41%)
- **Council tenants** are less likely to be using smart controls (23%)
- **Those in a property for 10+ years** are less likely to be using smart controls (22%)

E3: Do you currently use any kind of smart control (e.g., thermostat app, digital timer, remote control)? Base size: 919
Aged 55+ 310, SEG A: 78, SEG E: 134, Private homeowners: 353, Council tenants: 190, Those in a property 10+ years: 289

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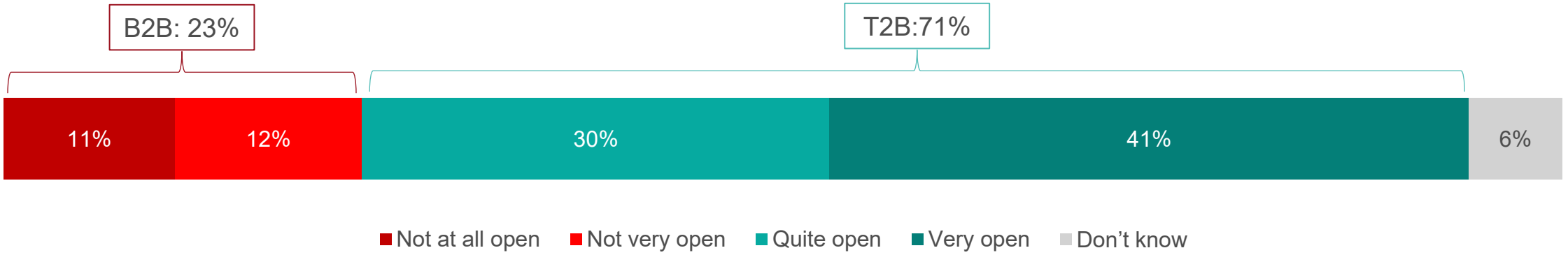
Openness to flexible heating

Once explained what flexible heating entails, 7 in 10 respondents say they are open to flexibility. However, there seems no obvious link between satisfaction and openness to flexibility, as evidenced by the fact that those aged 55+ are less likely to be very open despite having higher satisfaction with their heating/hot water system (vs. younger age groups).



Stimulus shown on flexibility

"Some new heating systems allow you to use smart controls (control of heating through a smartphone or internet-connected platform) to heat your space more flexibly. These systems provide a simple, accessible control system for your heating. Data can be used to make decisions and predictions around heat preferences. This would allow your space to be heated exactly the right amount, ensuring that target temperatures are met at minimal cost. This could mean your heating is adjusted slightly at different times of day, based on outside temperature, your schedule, or even lower-cost periods. The goal is to save energy, reduce costs, and make heating more sustainable."

FLEX1: How open, if at all, would you be to using a flexible heating system like this, if your comfort needs were still met? Base size: 919
Aged 18-34: 192, Aged 55+ 310

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Openness to flexibility - significant subgroup differences (versus total level results)

Those aged 18-34 are more likely to be very open (51%) and those aged **55+** were less likely to be very open (28%)

Those aged 35-54 are more likely to be open (T2B) (78% vs 71%)

Those with children <5 in the household are more likely to be open (82%)

Those in North England are less likely to be open (T2B) (58% vs 71%)

Private homeowners are more likely to be open (T2B) (82% vs 71%)

Council tenants are less likely to be open (T2B) (55% vs 71%)

SEG DE are less likely to be open (T2B) (58% vs 71%)

SEG AB are more likely to be open (T2B) (85% vs 71%)

Those that are PSR registered are less likely to be open (T2B) (52% vs 71%)

Those with adults 65+ in the household are less likely to be open (T2B) (53% vs 71%)

Base sizes: Aged 35-54: 404, North England: 158, Private homeowners: 353, Council tenants: 190, SEG AB: 281, SEG DE: 222, PSR registered: 61, 65+ in household: 141

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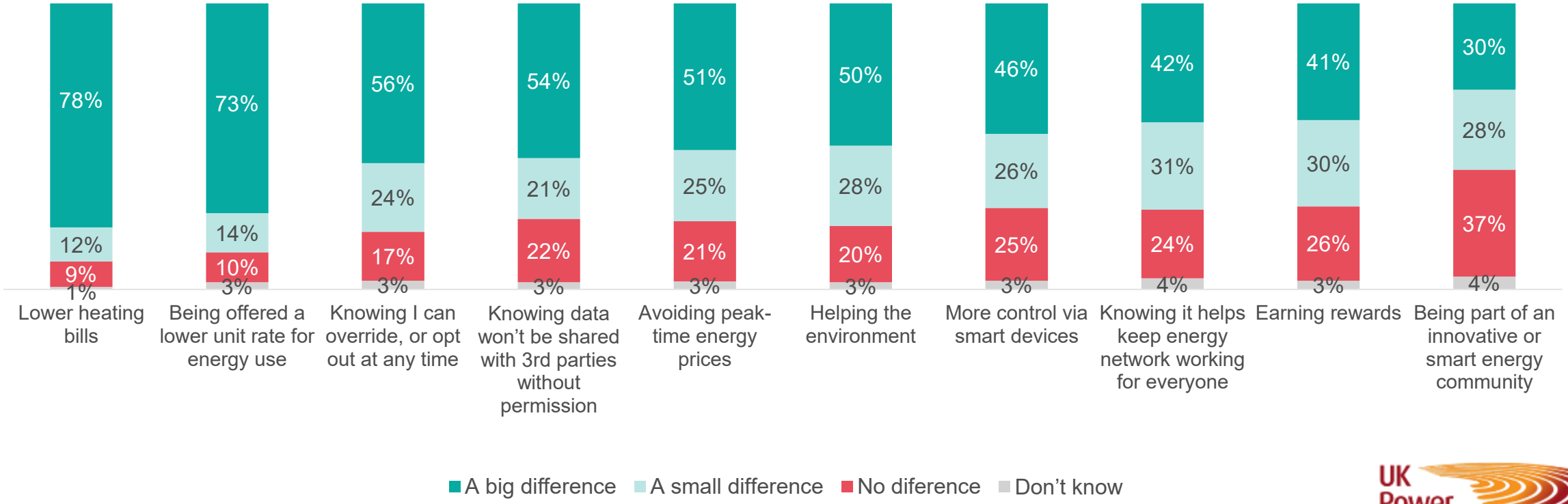
Drivers of openness to flexibility

Cost benefits (i.e., lower heating bills or discounted rates for energy consumption) would make the strongest difference to openness to using heating more flexibly. Conversely, being apart of an innovative/ smart energy community, would have the least impact on willingness to engage with flexibility.

Openness to flexibility with different benefits:



FLEX2: Some people have said they would be more open to using their home/ organisation or business heating more flexibly if it came with certain benefits. How much of a difference, if any, would each of the following make to you? Base size: 919

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Drivers of openness - significant subgroup differences (versus total level results) (1)

Those aged 35-54 are more likely to say lower bills (84% vs 78%) would make a big difference in openness to flexibility

Those aged 55+ are less likely to say lower bills (70% vs 78%), a lower unit rate (62% vs 73%), more control via smart devices (36% vs 46%), and earning rewards (34% vs 41%) would make a big difference in openness to flexibility

Private homeowners are more likely to say more control via smart devices (53% vs 46%) and less likely to say earning rewards (35% vs 41%) would make a big difference in openness to flexibility

Those in South England are more likely to say lower bills (82% vs 78%) and more control via smart devices (36% vs 46%) would make a big difference in openness to flexibility

Those in North England are less likely to say lower bills (68% vs 78%), a lower rate for energy use (63% vs 73%) and more control via smart devices (34% vs 46%) would make a big difference in openness to flexibility

Those with children <5 in the household are more likely to say helping the environment (57% vs 46%) and knowing it helps keep the energy network working for everyone (50% vs 41%) would make a big difference in openness to flexibility

Base sizes: Children in the household: 248, Aged 35-54: 404, Aged 55+: 310, South England: 646, North England: 158, Private homeowners: 353,

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Drivers of openness - significant subgroup differences (versus total level results) (2)

Those who have been in the property 10+ years are less likely to say more control via smart devices (38% vs 46%) would make a big difference in openness to flexibility

Those who have been in the property a year or less are more likely to say avoiding peak-time energy prices (72% vs 51%) and earning rewards (58% vs 41%) would make a big difference in openness to flexibility

Those with people aged 65+ in the household are less likely to say earning rewards (30% vs 38%) would make a big difference in openness to flexibility

Those who never struggle with bills are less likely to say:

- Lower heating bills (66% vs 78%)
- Being offered a lower unit rate for energy use (60% vs 73%)
- Knowing I can override, or opt out at any time (46% vs 56%)
- Knowing my data won't be shared with third parties without my permission (45% vs 54%)
- Avoiding peak-time energy prices (42% vs 51%)

Those who struggle with bills are more likely to say:

- Knowing it helps keep the energy network working for everyone (61% vs 42%)
- Being part of an innovative or smart energy community (48% vs 30%)

Base sizes: At the property 10+ years: 289, At the property a year or less: 78, 65+ in household: 141, Never struggle to pay bills: 219, Struggle to pay bills: 54

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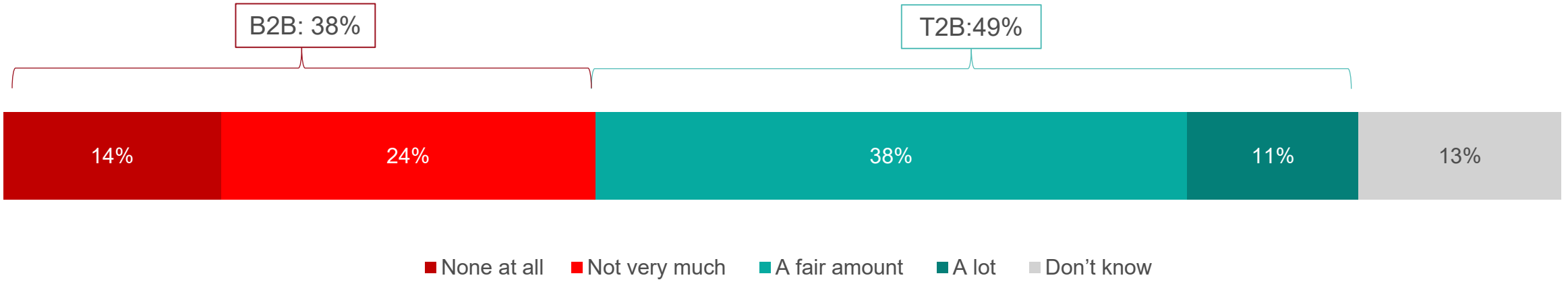
Trust in operator to use consumption data responsibly

Only half of respondents claim to trust their heat network operator to use their consumption data responsibly. Open-end feedback suggests that the lack of trust is influenced by fears such as data security, lack of transparency, and poor communication from their heat network operator.



Reasons for a lack of trust:

- Fears over how their data could be shared/ misused
- Negative previous experiences with their operator
- Poor communication from heat network operator
- Unreliable systems and management

"It would be as they have not been good at communicating with us, so I just do not think that I would trust them to use my home usage data responsibly."

"How do we know that they will use our home consumption data responsibly?"

"Their communication is terrible, and I don't feel they are reliable."

FLEX3: How much trust do have in your heat network operator to use your home/organisation or business consumption data responsibly? Base size: 919
FLEX4: You mentioned that you don't have much trust in your heat network operator to use your home/ organisation or business consumption data responsibly. What are your main concerns?

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Operator trust - significant subgroup differences (versus top level results)

Those in North England are more likely to have a lot of trust (16% vs 11%)

Those who never struggle to pay bills are more likely to have a lot of trust (17% vs 11%)

Base sizes: North England: 158, Struggle to pay bills: 54

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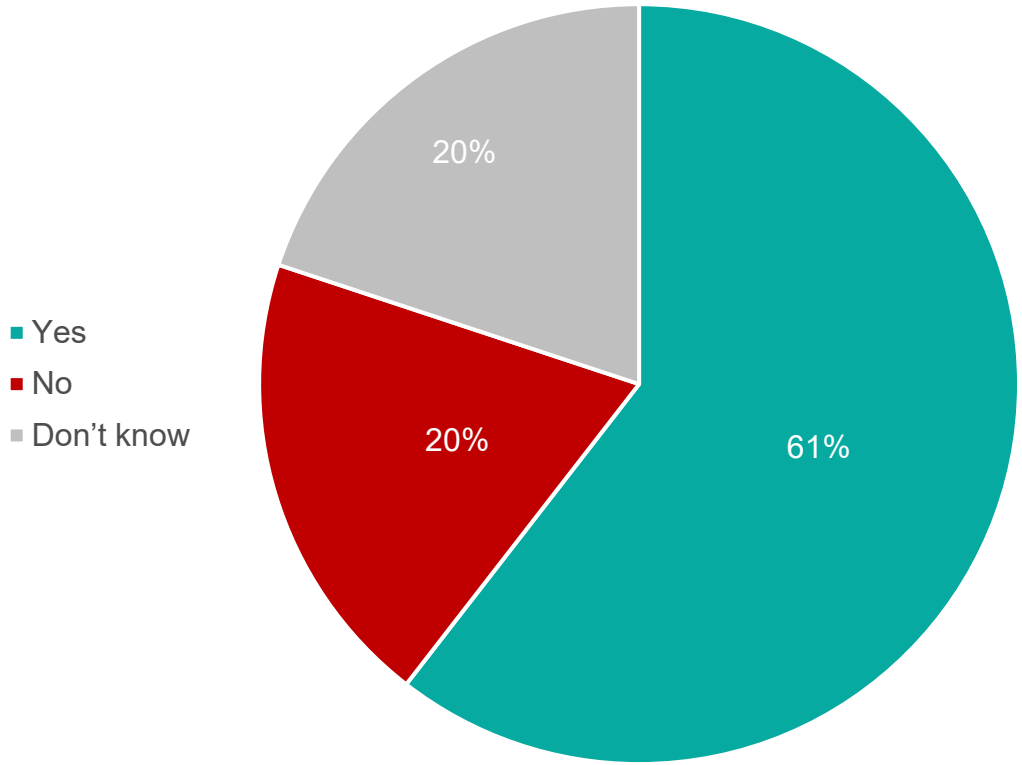
Willingness to share heating usage data

3 in 5 respondents would be willing to share their heating usage data with their heat network operator. However, this drops among those who have no trust in their heat network operator, suggesting that issues around trust and transparency have a knock-on effect when it comes to openness to sharing data.



Willingness to share usage data drops to **41%** among those who said they had no trust

SEG AB were more likely to be willing to share data (68% vs 61%)

FLEX5: To help manage heating demand more efficiently, would you be willing to share your home/organisation or business heating usage data with your heat network operator? Base size: 919
SEG AB: 281

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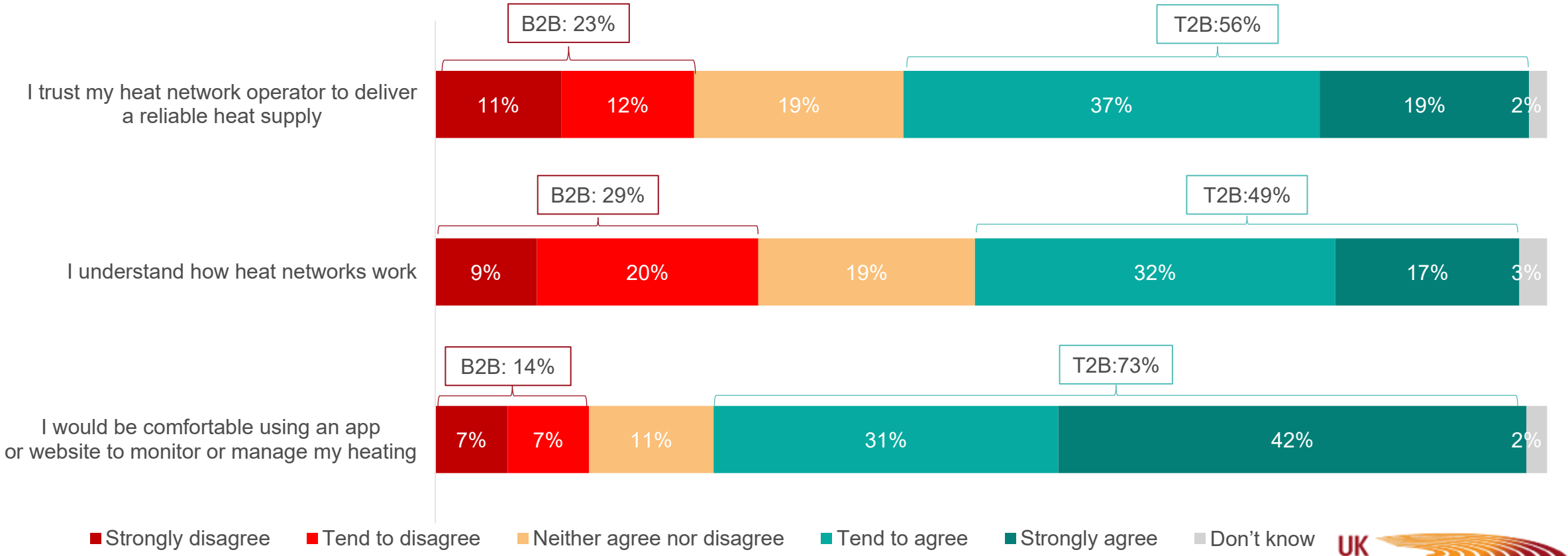
Attitudes and Perceptions

Understanding and trust

Levels of trust in heat network operators and understanding of how networks function are both moderate, suggesting that users feel reasonably confident, but are not fully assured. In contrast, there is much greater openness to digital tools, with many participants expressing comfort in managing their heating through an app or website.



A1: To what extent do you agree or disagree with each of the following statements? Base size: 919

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Understanding and trust - significant subgroup differences (versus top level results) (1)

Aged 18-34 are more likely to agree they would be comfortable using an app or website to monitor or manage heating (86% vs 73%)

Aged 35-54 are more likely to agree they would be comfortable using an app or website to monitor or manage heating (81% vs 73%)

Those in Central England are more likely to agree that they trust their heat network operator to deliver a reliable heat supply (70% vs 56%)

Aged 55+ are less likely to agree they would be comfortable using an app or website to monitor or manage heating (55% vs 73%)

Those in North England are more likely to agree that they trust their heat network operator to deliver a reliable heat supply (66% vs 56%) and less likely to agree would be comfortable using an app or website to monitor or manage heating (55% vs 73%)

Those in South England are more likely to agree they would be comfortable using an app or website to monitor or manage heating (78% vs 73%)

Base sizes: Aged 18-34: 192, Aged 35-54: 404, Central England: 97, Aged 55+: 310, North England: 158, South England: 646

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Understanding and trust - significant subgroup differences (versus top level results) (2)

Private homeowners are less likely to agree that they trust their heat network operator to deliver a reliable heat supply (49% vs 56%) and more likely to agree would be comfortable using an app or website to monitor or manage heating (81% vs 73%)

Those with people aged 65+ are less likely to agree that they would be comfortable using an app or website to monitor or manage heating (49% vs 73%)

Those who have been in the property a year or less are more likely to agree they would be comfortable using an app or website to monitor or manage heating (85% vs 73%)

Council tenants are more likely to agree that they trust their heat network operator to deliver a reliable heat supply (68% vs 56%), and less likely to agree they understand how heat networks work (40% vs 49%) and they would be comfortable using an app or website to monitor or manage heating (61% vs 73%)

Those who have been in the property 10+ years are less likely to agree they would be comfortable using an app or website to monitor or manage heating (85% vs 73%)

Those with children <5 in the household are more likely to agree that they would be comfortable using an app or website to monitor or manage heating (85% vs 73%)

Base sizes: Private homeowners: 353, 65+ in household: 141, In the property a year or less: 78, Council tenants: 190, In the property 10+ years: 289, Children in the household: 248

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Understanding and trust - significant subgroup differences (versus top level results) (3)

Those who never struggle to pay their bills are more likely to agree they trust their operator (73% vs 56%) and they understand how heat networks work (57% vs 49%)

Those who struggle with bills are less likely to agree they understand how heat networks work (40% vs 49%)

Base sizes: Never struggle to pay bills: 219, Struggle to pay bills: 54

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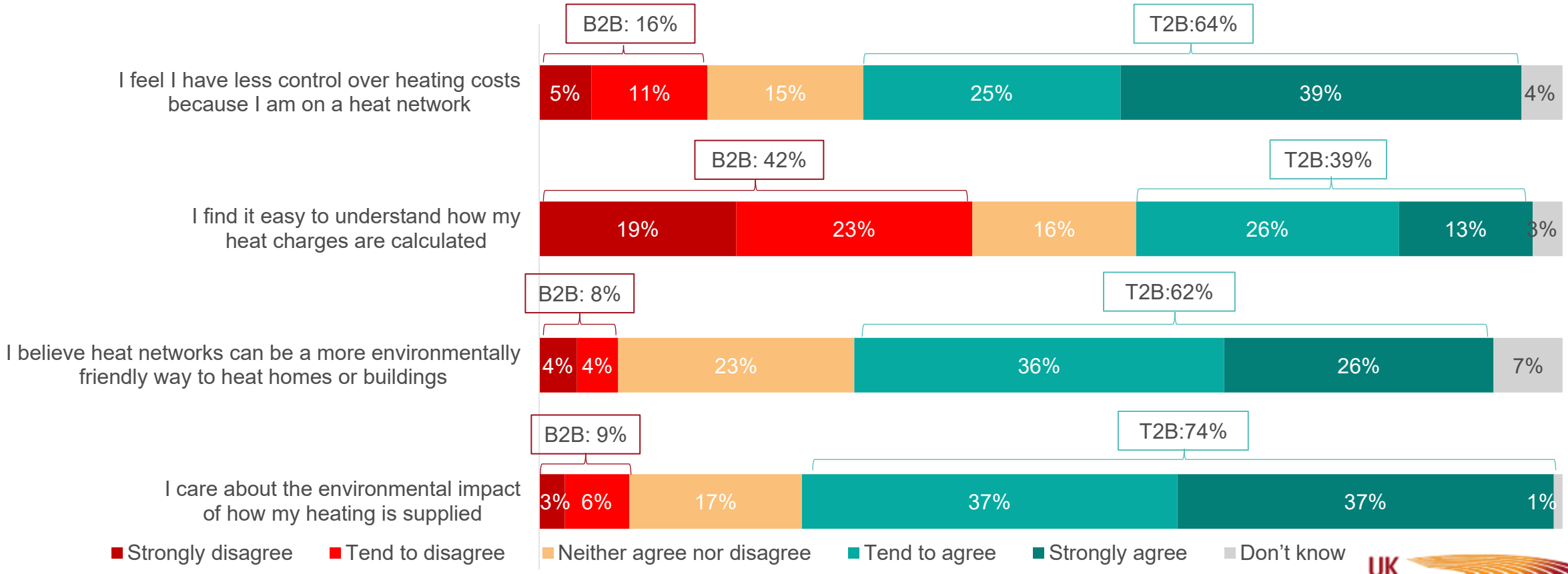
Cost and control perceptions

Nearly two-thirds feel they have less control over costs on a heat network, and only four in ten find charges easy to understand. However, most recognise heat networks as a more environmentally friendly way to heat homes and care about their environmental impact. **No age-based differences in sentiments around controls were identified.**



A1: To what extent do you agree or disagree with each of the following statements? Base size: 919

Cost and control - significant subgroup differences (versus total level results) (1)

Private tenants are less likely to agree that heat networks can be a more environmentally friendly way to heat homes or buildings (30% vs 39%)

Those who never struggle to pay bills are more likely to agree that heat networks can be a more environmentally friendly way to heat homes or buildings (52% vs 39%)

Those who struggle to pay bills are less likely to agree that heat networks can be a more environmentally friendly way to heat homes or buildings (22% vs 39%)

Base sizes: Private tenants: 142, Never struggle to pay bills: 219, Struggle to pay bills: 54

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Summary and Conclusion

Results at a glance

Primary research was conducted to understand the views of wider UK heat network end consumers.

61% are **willing to share heating usage data** to support **more efficient** demand management. 	**73%** are comfortable using digital tools or smart controls to monitor or manage their heating. 	**71%** are open to flexible heating, especially if it leads to lower bills or rates. 	Those in London are slightly less likely to be satisfied with their heating system than the total. 
74% care about the **environmental impact** of their heating supply, while **62%** believe **heat networks can be more environmentally friendly** than alternatives. 	**65%** of heat networks customers are satisfied their heating and hot water system, driven by reliability. 	**49% understand** how heat networks work or how **heat charges** are calculated 	Those who **often/always struggle to pay bills** are less satisfied with all aspects of their heating system 

Summary and conclusion

Customer base and vulnerability risks

Customers who often/always struggle with bills report lower satisfaction and weaker understanding of how heat networks work, increasing the risk of disengagement.

Older and digitally cautious groups face barriers: 65+ households are less open to flexibility and less comfortable using apps; council tenants likewise report lower app comfort and lower openness, raising the risk of digital exclusion from Smart trials.

Willingness to share data falls to 41% where trust is low, amplifying participation risks in settings with limited confidence.

Customer experience

Customers **shared mixed experiences with their heating systems**. Many found their system to be reliable, but others **highlighted frustrations around high or unclear costs, inconsistent performance, and limited control.**

Trust in operators is strongly tied to how well they communicate and respond to customer needs, with poor communication often leading to reduced confidence and perceived unfairness.

Openness to flexibility

Customers show openness to more flexible and data-driven approaches when they can see personal and environmental benefits**.** Lower **costs and fair pricing are the strongest motivators** for engagement.

Many are willing to share heating usage data if operators **communicate clearly, explain how data will be used, and ensure it is handled responsibly.**

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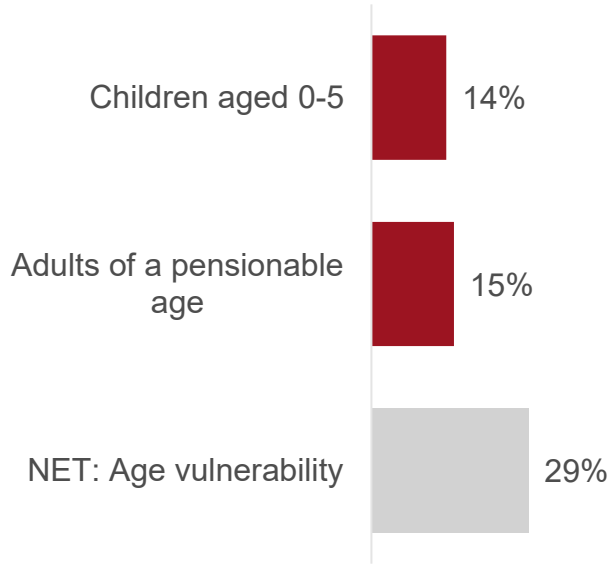
Appendix

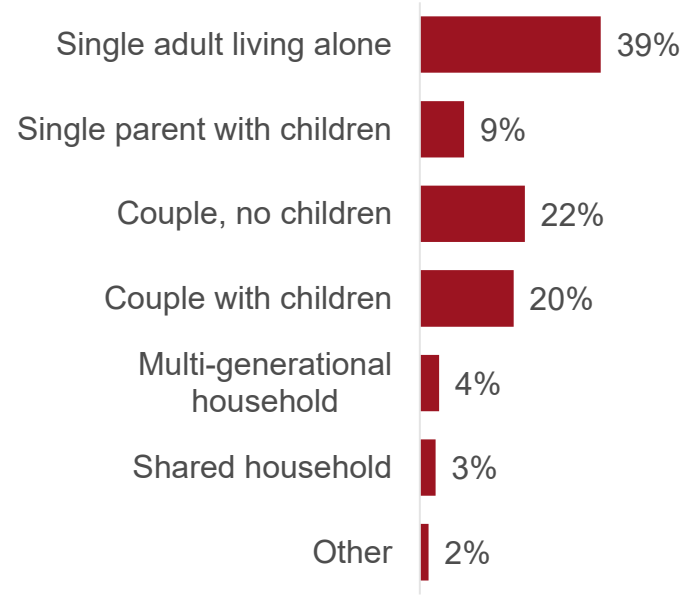
Additional profiling (1)

To ensure representation of different groups, we included questions around household composition. This allowed to us to test for differences among those with children aged 0-5 in the household.

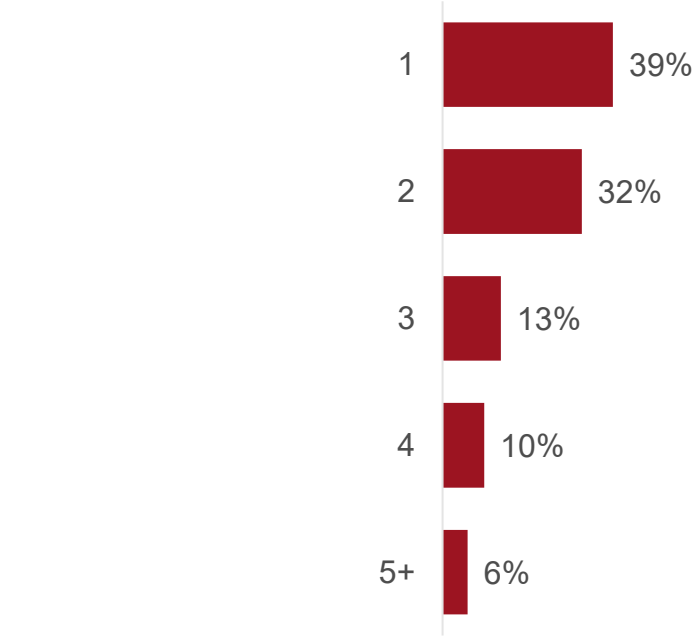
Age vulnerability:



Household composition:



Number of people living in the household:



P8: Including yourself, how many people usually live in your household? Base size: 918
P9A: Which of the following best describes your household? Base size: 918
P9B: Thinking about everyone who usually lives in your home (including yourself), which of the following age groups are represented? Please select all that apply. Base size: 918

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Additional profiling (2)

Chronic/serious illness	14%	13%	6%
Mental Health issues e.g. anxiety	10%	9%	5%
Physical Impairment	8%	7%	3%
Pensionable Age	8%	7%	4%
Young children aged 5 or under	7%	5%	6%
Hearing /speech difficulties (including deaf)	3%	2%	1%
Developmental condition	3%	1%	2%
Medically Dependant Equipment	2%	2%	1%
Not comfortable with male engineer in home without additional female presence	2%	1%	1%
Unable to communicate in English	2%	1%	1%
Temporary - life change for example post hospital recovery, unemployment, infant in the house	2%	1%	1%
Poor sense of smell	2%	1%	0%
Unable to answer door	2%	1%	1%
Restricted hand movement	2%	1%	1%
Partially sighted	1%	1%	1%
Oxygen use	0%	0%	0%
Blind	0%	0%	0%
Dementia	0%	0%	0%
None of the above	78%	60%	72%
Prefer not to say	8%	6%	6%

Registered on a support service/ scheme that provides extra assistance with heating/ hot water:

Yes = 7%

No = 90%

Don’t know = 4%

P10: There are a wide range of factors that could mean anyone might need extra help or support from their heat network provider during a heating or hot water supply interruption. Do you feel that any of the following factors apply to you or anyone in your household that might mean you need extra support or help during a loss of heating or hot water? Base size: 918
P11: Are you, or anyone in your household, currently registered for any kind of support service or scheme that provides extra assistance with heating, hot water, or related needs. Base size: 918

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