

# Business Plan Acceptability Testing

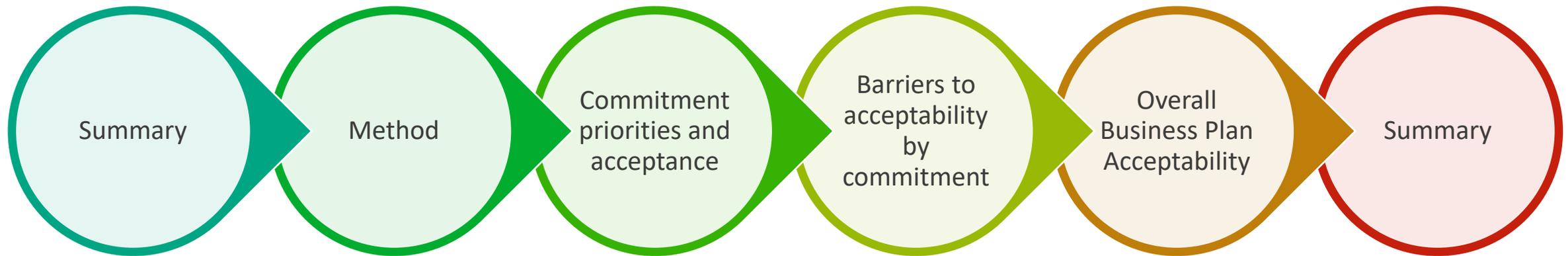
## Final report

Prepared for **Wales and West Utilities**  
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# Content





## Background

As part of its RII0-GD3 Business Plan submission process, WWU needs to understand the value customers place on different aspects of its proposed services and their willingness to accept standards in services on key elements of WWU's 2026-2031 plan.

17 commitments across 5 themes have been identified by WWU as the key elements of the proposed business plan.

This research set out to clearly communicate the commitments to domestic and SME customers, and evaluate how acceptable they are.

This report presents the findings of this research, demonstrating the extent to which the business plan is justifiable, especially in the context of the ongoing cost-of-living crisis.

## Executive Summary

All commitments receive a very high level of acceptance from domestic customers (90%+), but commitments from Theme 2 ('Maintaining a safe and resilient network') perform most strongly. Those from Theme 5 ('Delivering an environmentally sustainable network – Net Zero') are amongst the least strong.

In contrast to Domestic customers, SME customers accept some 'environment – Net Zero' commitments very strongly, while most of the 'Value for money' commitments are relatively less strong.

While it is not the most important commitment for Domestic customers, 'Innovate to speed up WWU's transition to net zero and improve other areas of the business' is one of the strongest differentiations of those customers who strongly accept the overall plan acceptance

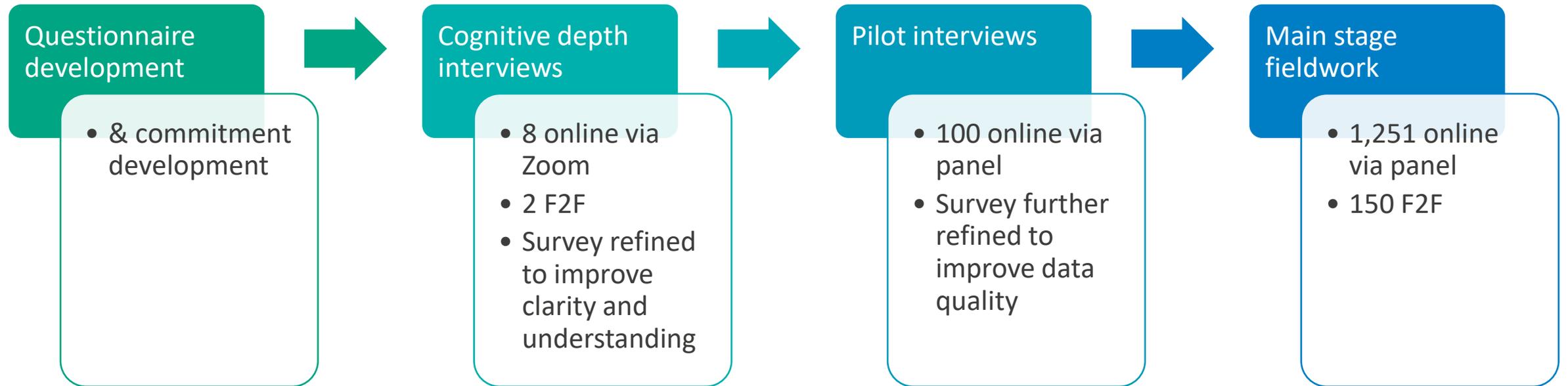
Method

**IMPACT**

FROM INSIGHT TO INFLUENCE

# Method

1,401 x 20-minute interviews conducted in October 2024



# WEIGHTING & SIGNIFICANCE – Representative Domestic Sample

The data in this report has been weighted to ensure the sample profile is nationally representative of the WWU region according to the following profiles: gender, socioeconomic group (SEG), WWU region and age.



Nat rep profile	Male	Female	Non-binary or other	Prefer not to say
Unweighted base	576	669	3	1
Weighted base	627	627	2	1

Nat rep profile	18-24 year old	24-44 year old	45-64 year old	65-74 year old	75+ year old
Unweighted base	173	479	349	157	91
Weighted base	147	364	349	218	171

Nat rep profile	SEG AB	SEG C1C2	SEG DE
Unweighted base	381	568	300
Weighted base	251	671	327

Nat rep profile	South Wales	North & Mid-Wales	Devon & Cornwall	Bristol, Gloucester, Somerset & Wiltshire
Unweighted base	522	142	216	369
Weighted base	443	164	281	360

- Unweighted bases are shown throughout
- All significance testing is conducted at 95% level
- SME customers were not weighted

# Achieved sample – unweighted base (domestic)

Type	
Domestic bill payer	1149
Future bill payer	80

Recruitment	
Panel	1100
CAPi	149

Region	
South Wales	522
North & Mid-Wales	142
Devon & Cornwall	216
Bristol, Gloucester, Somerset & Wiltshire	369

Location (urbanicity)	
Urban	241
Sub-urban	695
Rural	306
Other / don't know	7

Age	
18-24 years old	173
25-34 years old	263
35-44 years old	216
45-54 years old	171
55-64 years old	178
65-74 years old	157
75+ years old	91

Gender	
Male	576
Female	669
Non-binary or other	3
Prefer not to say	1

Type	
A	128
B	253
C1	359
C2	209
D	163
E	137

Payment responsibility	
Complete responsibility	756
Shared with others in household	409
Paid by landlord and included in rent	26
Someone else pays bills	56
Don't know	2

Ethnicity	
African	39
Any other Asian background	11
Any other Black, Black British, or Caribbean background	9
Any other ethnic group	4
Any other Mixed or multiple ethnic background	10
Any other White background	24
Arab	1
Bangladeshi	4
Caribbean	4
Chinese	14
English, Welsh, Scottish, Northern Irish or British	1067
Indian	19
Irish	7
Irish Traveller	0
Pakistani	8
Roma	1
White and Asian	13
White and Black African	4
White and Black Caribbean	10
Would rather not say	0

# Achieved sample – unweighted base (SME)

Recruitment	
Panel	152
CAPI	N/A

Business size	
1 (sole trader)	34
2 to 9	33
10 to 20	37
21 to 50	48

Sector	
Private	121
Public	23
Charity / Third sector	6
Other	2

Business sector	
Accommodation & food services	7
Agriculture, forestry & fishing	3
Arts, entertainment, recreation	7
Business administration, support	4
Construction	23
Education	17
Financial and insurance	8
Health	9
Information and communication	6
Manufacturing	11
Mining, quarrying, utilities	1
Motor trades	1
Professional, scientific, technical	8
Property	2
Public administration, defence	0
Retail	30
Transports, storage (inc. postal)	4
Wholesale	1
Other	10

Region	
South Wales	57
North & Mid-Wales	13
Devon & Cornwall	34
Bristol, Gloucester, Somerset & Wiltshire	48

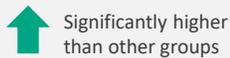
Business location (urbanicity)	
Urban	62
Sub-urban	67
Rural	23

# SIGNIFICANCE TESTING AND ACRONYMS

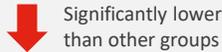
Significance testing in this report is conducted by comparing sub-groups against each other. For both methods, the results have been tested using 95% confidence intervals.

## Comparing sub-groups:

Where we have tested sub-groups, you will see one of the following on the screen:



Significantly higher than other groups



Significantly lower than other groups

Green text = significantly higher than other groups

Red text = significantly lower than other groups

Where you see these, for any group(s) which is significantly higher/lower than others, an arrow (or coloured text) will be placed with the data point. Where no arrow or red text appears, the result is not significantly different.

Which symbol is used (arrow/text colour) depends on the quantity of subgroup differences present.

## Acronyms used in this report:

T2B

Top 2 Box (percentage score for highest two points on rating scale combined)

B2B

Bottom 2 Box (percentage score for lowest two points on rating scale combined)

WWU

Wales & West Utilities

SEG

Socioeconomic group

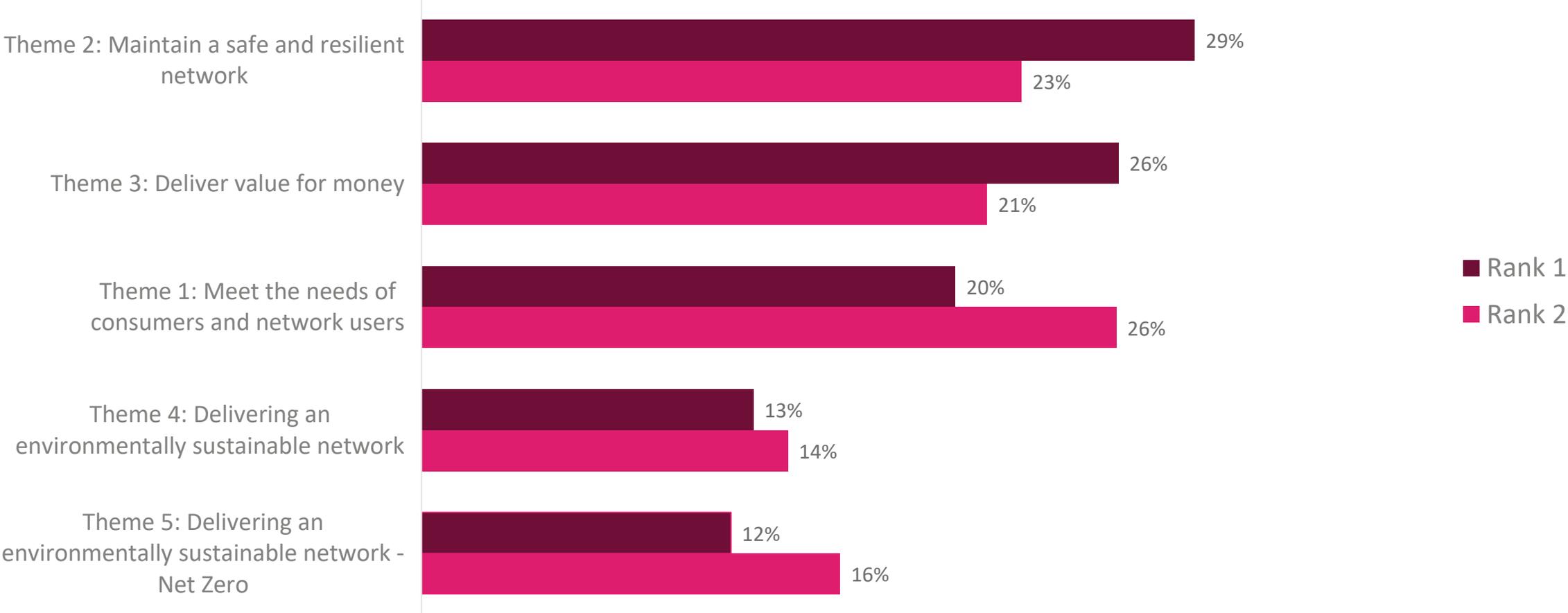
Commitments:  
priorities and  
acceptance

**IMPACT**

FROM INSIGHT TO INFLUENCE

# Overall ranking of themes - Domestic

'Maintaining a safe and resilient network' is ranked the most important theme by domestic customers, followed by 'delivering value for money'.



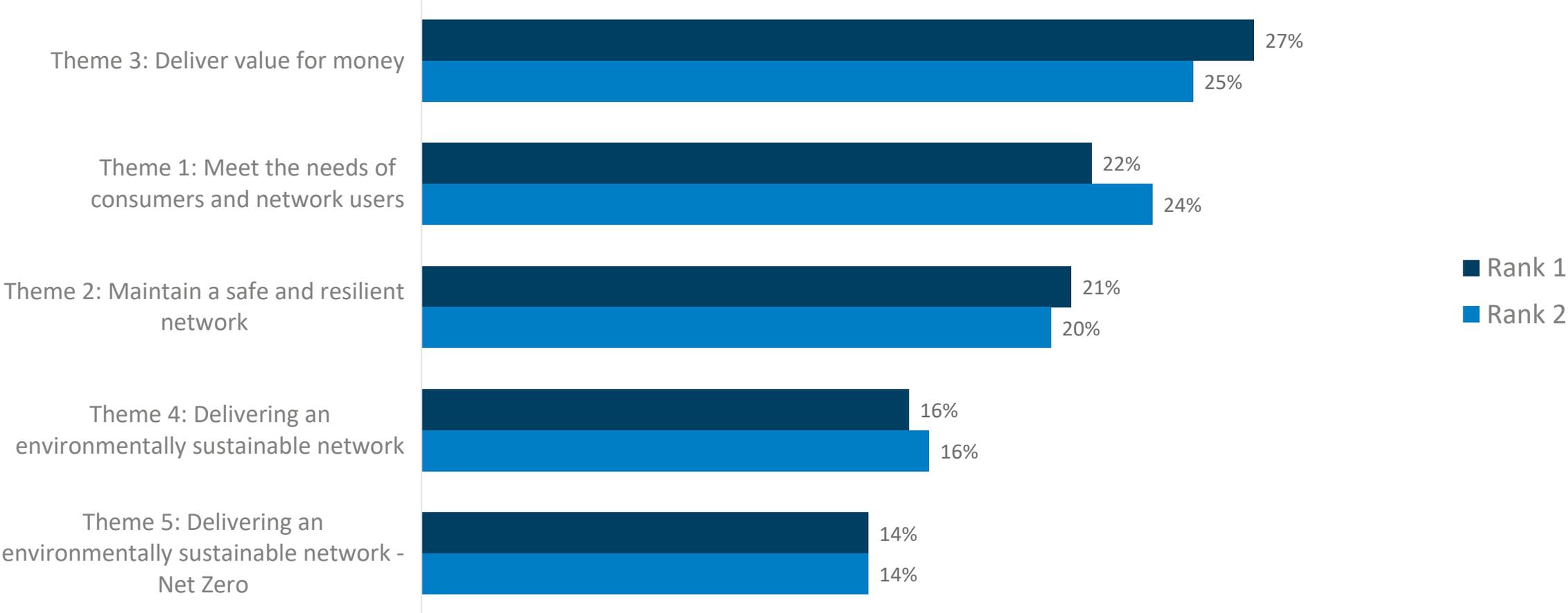
## Themes: Domestic Average Acceptance Scores (% agree or completely agree)

When the % 'completely agree and agree' responses for each commitment are averaged for each theme, we see that the most important theme, 'Maintaining a safe and resilient network', is strongest and 'delivering an environmentally sustainable network – Net Zero', the least important, is weakest for domestic customers.

Theme	Domestic Customers			
	Overall, this commitment is acceptable to me to include in the business plan	It is easy for me to understand what WWU are planning to do for this commitment	The benefits of this commitment are easy to understand	Doing this will effectively prevent the risks that could happen if WWU don't do it
% agree or completely agree with statement				
Theme 1: Meeting the needs of consumers and network users	93%	93%	94%	92%
Theme 2: Maintaining a safe and resilient network	96%	96%	96%	95%
Theme 3: Delivering value for money	93%	91%	91%	90%
Theme 4: Delivering an environmentally sustainable network	93%	91%	92%	90%
Theme 5: Delivering an environmentally sustainable network - Net Zero	91%	91%	90%	89%

# Overall ranking of themes - SMEs

‘Delivering value for money’ is ranked the most important theme by SMEs, followed by ‘meeting the needs of consumers and network users.’



## Themes: SME Average Acceptance Scores (% agree or completely agree)

‘Maintaining a safe and resilient network’ is consistently strong for SME customers, but ‘Meeting the needs of consumers and network users’ and ‘delivering an environmentally sustainable network’ are also strong. ‘Value for money’, the most important theme for SME customers, is the least strong.

	SME Customers			
Theme	Overall, this commitment is acceptable to me to include in the business plan	It is easy for me to understand what WWU are planning to do for this commitment	The benefits of this commitment are easy to understand	Doing this will effectively prevent the risks that could happen if WWU don't do it
% agree or completely agree with statement				
Theme 1: Meeting the needs of consumers and network users	95%	94%	95%	92%
Theme 2: Maintaining a safe and resilient network	96%	94%	95%	95%
Theme 3: Delivering value for money	94%	92%	90%	90%
Theme 4: Delivering an environmentally sustainable network	95%	95%	94%	92%
Theme 5: Delivering an environmentally sustainable network - Net Zero	96%	94%	95%	93%

# Commitments: Domestic Overall Acceptance Scores (% agree or completely agree)

Although all the commitments receive a very high level of acceptance (90%+), commitments from Theme 2 ('Maintaining a safe and resilient network') perform most strongly. Those from Theme 5 ('Delivering an environmentally sustainable network – Net Zero') are amongst the least strong.



# Commitments: SME Overall Acceptance Scores (% agree or completely agree)

In contrast to Domestic customers, SME customers accept some Theme 5 ('environment – Net Zero') commitments very strongly, while most of the Theme 3 ('Value for money') commitments are relatively less strong, though all are higher than 90%.



Theme 1: Meeting the needs of consumers and network users
Theme 2: Maintaining a safe and resilient network
Theme 3: Delivering value for money
Theme 4: Delivering an environmentally sustainable network
Theme 5: Delivering an environmentally sustainable network - Net Zero

Barriers to  
acceptability by  
commitment

**IMPACT**

FROM INSIGHT TO INFLUENCE

# Barriers to acceptability for each commitment (*theme 1*)

## Theme 1: Meeting needs of consumers & network users

Commitment	% not acceptable*	Top two barriers (coded from open ends)	
<b>C1:</b> Support customers as the UK moves to low carbon heating systems.	9%	#1: Concerns over cost #2: Lack of understanding / perceived complexity	<i>"Without government funding the average household will not be able to afford to upgrade"</i>
<b>C2:</b> Identify and support customers who need more help to stay safe and warm.	5%	#1: Concerns over cost #2: Concerns over support being given to those who are not at-risk	<i>"it will cost everyone to have the work done, regardless"</i>
<b>C3:</b> Provide an exceptional level of service to WWU's customers, meeting their expectations.	6%	#1: Distrust in commitment/execution #2: Lack of understanding / perceived complexity	<i>"Seems to be high end corporate speak that means little."</i>
<b>C4:</b> Minimise both the number of times and for how long gas is off for when we're working or when there is an emergency.	7%	#1: 10 hours too long to be without gas #2: Concerns over cost	<i>"My wife needs heating and if this is done in the winter she will have serious health issues."</i>

\*Only those who did not consider a commitment acceptable were asked for their perceived reasons for unacceptability

# Barriers to acceptability for each commitment (*theme 2*)

Theme 2: Maintaining a safe and resilient network		
Commitment	% not acceptable*	Top two barriers (coded from open ends)
<b>C1:</b> Keep people and their properties safe by making sure WWU engineers get to all reported gas leaks rapidly.	4%	#1: Perception it already is or should be standard #2: Lack of specificity
<b>C2:</b> Maintain a safe and reliable gas network, while upgrading WWU’s gas pipes, actively reducing carbon emissions to support the UK’s environmental targets.	4%	#1: Concerns over cost #2: Lack of understanding / perceived complexity

*“it needs a disclosure of a specific procedure as to how to reach these projections.”*

*“Fixing pipes etc. will most likely raise gas prices for customers even when they are so high already.”*

\*Only those who did not consider a commitment acceptable were asked for their perceived reasons for unacceptability

## Barriers to acceptability for each commitment (*theme 3*)

### Theme 3: Delivering value for money

Commitment	% not acceptable*	Top two barriers (coded from open ends)	
<b>C1:</b> Safeguard WWU's data against cyber threats and only make it accessible when safe to do so.	6%	#1: Lack of understanding / perceived complexity #2: Concerns over cost	"Cyber crime can be confusing to consumers especially the elderly"
<b>C2:</b> Innovate to speed up WWU's transition to net zero and improve other areas of the business.	9%	#1: Lack of specificity #2: Scepticism over net zero	"It's all grand plans but nothing specific."
<b>C3:</b> Reduce how much it costs us to run the business by 0.5% a year, by improving how we do things.	7%	#1: Concerns over potential job cuts #2: Scepticism it will translate to reduced cost to customers	"This will probably include job cuts, which I'm not a fan of."

\*Only those who did not consider a commitment acceptable were asked for their perceived reasons for unacceptability

# Barriers to acceptability for each commitment (*theme 4*)

Theme 4: Delivering an environmentally sustainable network		
Commitment	% not acceptable*	Top two barriers (coded from open ends)
<b>C1:</b> Help WWU’s business and partners leave the environment in a better state when working in an area, such as by offering use of WWU land to community groups.	8%	#1: Considered unnecessary or irrelevant to WWU #2: Concerns over cost
<b>C2:</b> Support the ecosystem by planting more native trees in their natural habitat.	5%	#1: Considered unnecessary or irrelevant to WWU #2: Distrust in commitment/execution
<b>C3:</b> Reduce its business carbon footprint (the amount of harmful carbon emissions released into the atmosphere) ahead of government targets.	9%	#1: Scepticism over net zero or government targets #2: Lack of specificity

“They’re meant to be doing the gas not posturing with other things- reduce the prices if they've got enough spare to do this”

“I don't believe wasting money planting trees to offset gas works is really beneficial. Spend the money getting the job done quicker.”

“All these reduced carbon emissions don't make economic sense when viewed in the global picture”

\*Only those who did not consider a commitment acceptable were asked for their perceived reasons for unacceptability

## Barriers to acceptability for each commitment (*theme 5*)

### Theme 5: Delivering an environmentally sustainable network - Net Zero

Commitment	% not acceptable*	Top two barriers (coded from open ends)	
<b>C1:</b> Speed up the transition to decarbonisation (net zero), which includes delivering low carbon hydrogen as a substitute for natural gas.	9%	#1: Concerns over cost #2: Scepticism over net zero	<i>"Switching over to hydrogen power, in its current form, is going to cost every single person in this country an absolute fortune. Now is not the time."</i>
<b>C2:</b> Increase the amount of low carbon gas that we can transport, which is produced from organic feedstock, like vegetable waste, that would otherwise go to waste.	8%	#1: Concerns over cost #2: Lack of understanding / perceived complexity	<i>"This is not an acceptable commitment unless you can prove the economics of this option is viable and sustainable."</i>
<b>C3:</b> Lower carbon emissions by replacing up to 20% of the gas WWU transports with low carbon hydrogen.	8%	#1: Target considered too low for aims #2: Lack of understanding / perceived complex	<i>"It doesn't sound like reducing gas by 20% and replacing it with hydrogen is close to being enough to achieve net zero"</i>
<b>C4:</b> Attract diverse and talented people who reflect the communities WWU serves, and who have or can develop the skills needed to deliver a net zero network.	9%	#1: Concerns over diversity quotas #2: Concerns over cost	<i>"It is better to train the right staff according to ability than any quotas for inclusiveness"</i>
<b>C5:</b> Invest in improving colleagues' knowledge and skills at WWU so it can deliver a net zero ready network.	9%	#1: Perception it should already be standard #2: Concerns that most capable staff not being selected/recruited	<i>"They should be doing this already. It is not clear how this will help us to get to net zero."</i>

\*Only those who did not consider a commitment acceptable were asked for their perceived reasons for unacceptability

Produced by Impact Research Ltd in strict confidence

# Overall Business Plan Acceptability

**IMPACT**

FROM INSIGHT TO INFLUENCE

# CHAID analysis: Which commitments make the business plan 'very acceptable'

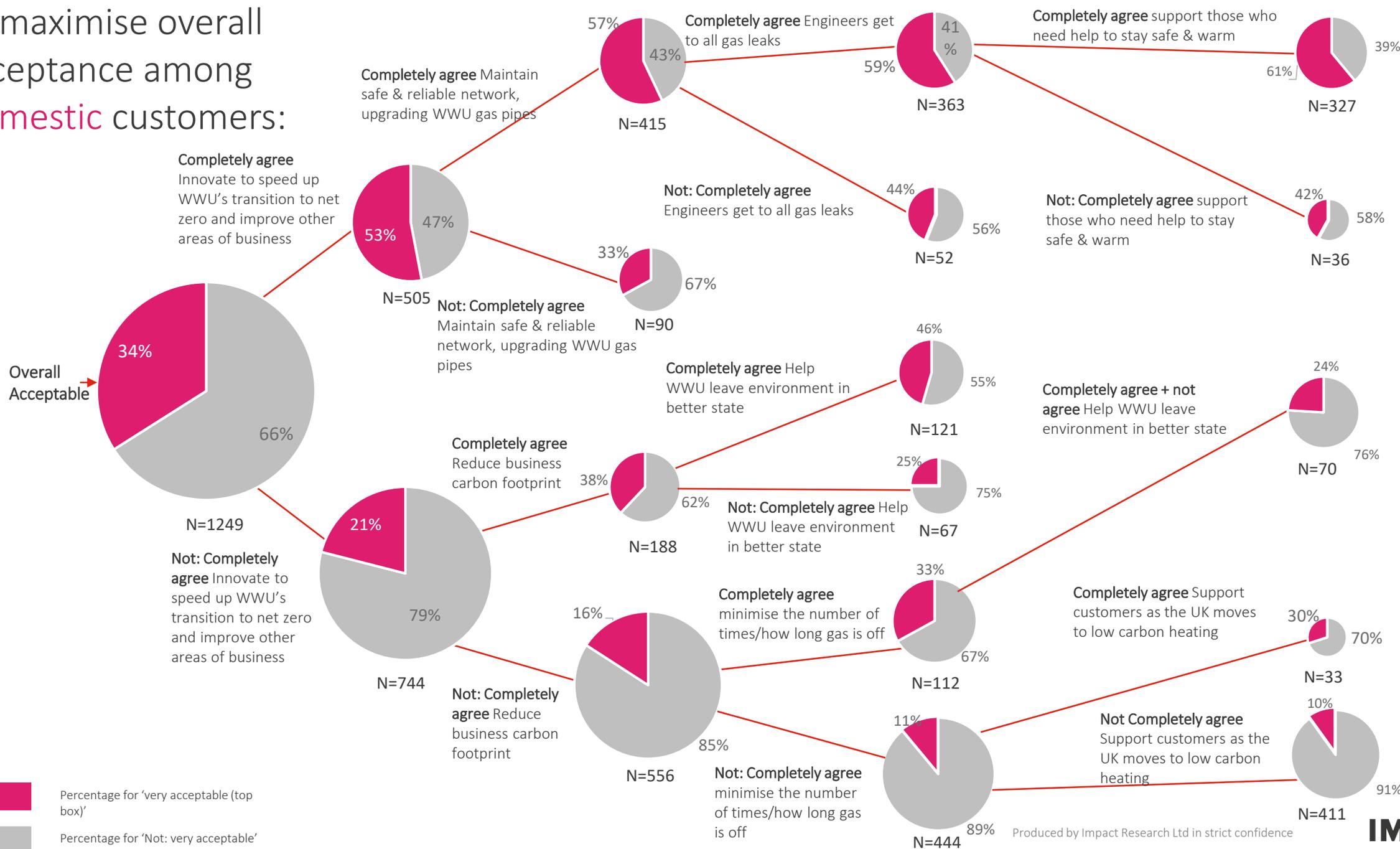
CHAID analysis was conducted to identify the main reasons for the business plan being 'very acceptable' among **domestic** customers (the SME sample was too small to support a similar analysis).

This flexible statistical technique analyses all possible combinations of measures to identify a division of respondents that differ most from each other in terms of very high acceptability v all other responses. **This identified those commitments that most related to why some customers find the overall plan very acceptable vs. those who do not.**

The slide that follows indicates that the commitments that most influence overall plan acceptability are:

- Innovate to speed up WWU's transition to net zero and improve other areas of business (Theme 3 C2)
- Maintain safe & reliable network, upgrading WWU gas pipes (Theme 2 C2)
- Engineers get to all gas leaks quickly (Theme 2 C1)
- Support those who need help to stay safe & warm (Theme 1 C2)
- Reduce business carbon footprint (Theme 4 C3)
- Leave environment in better state when working in an area (Theme 4 C1)
- Minimise the number of times / how long gas is off (Theme 1 C4)
- Support customers as the UK moves to low carbon heating (Theme 1 C1)

# To maximise overall acceptance among Domestic customers:



 Percentage for 'very acceptable (top box)'  
 Percentage for 'Not: very acceptable'

# Reasons for the overall business plan not being acceptable

## Domestic % fairly / very unacceptable

### Reason #1 Concerns over cost

*"I think the prices are too high as it is. No one is asking for this upgrade to be done. It's just another way of putting the price up."*

## SMEs % fairly / very unacceptable

### Concerns over cost

*"The bills are way too high as they are. The company needs to sort this out before it does anything else."*

### Reason #2 Concerns about company profits or priorities

*"Recent headlines lead me to believe that utilities companies are making a lot of money already, far in excess of what a successful business should be making."*

### Concerns about company profits or priorities

*"Profits are at an all time high for this company and should be invested more efficiently."*

### Reason #3 Lack of confidence it will be followed

*"The plan sounds good, but I have my doubts it will be followed"*

### Belief it should already be in place

*"These changes should be already happening with the costs already incurred on our bills."*

# SUMMARY OF FINDINGS

**IMPACT**

FROM INSIGHT TO INFLUENCE

# Summary of Findings

## Domestic customers

- All commitments receive a very high level of acceptance from domestic customers (90%+), but commitments from Theme 2 ('Maintaining a safe and resilient network') perform most strongly. Those from Theme 5 ('Delivering an environmentally sustainable network – Net Zero') are amongst the least strong. This is consistent with the rank ordering of these items in terms of importance.

## SME customers

- In contrast to Domestic customers, **SME customers** accept some 'Environment – Net Zero' commitments very strongly, while most of the 'Value for money' commitments are relatively less strong. This is the opposite of the importance ranking given to these commitments, so that 'Value for money' is a relatively weaker part of the plan for SME customers.

## Overall plan acceptance

- Customers demonstrate a very high level of acceptance towards the overall plan.
- While it is not the most important commitment for **Domestic customers**, 'Speed up WWU transition to net zero and improve other areas of the business' is commitment most associated with those who find the plan *very* acceptable.

THANK YOU

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All projects are carried out in compliance with the ISO 20252 international  
standard for market, opinion and social research and GDPR.

**IMPACT**

FROM INSIGHT TO INFLUENCE

# Appendix

**IMPACT**

FROM INSIGHT TO INFLUENCE

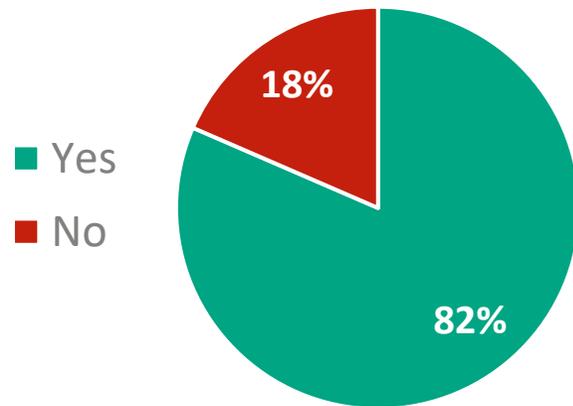
# Awareness and Satisfaction

**IMPACT**

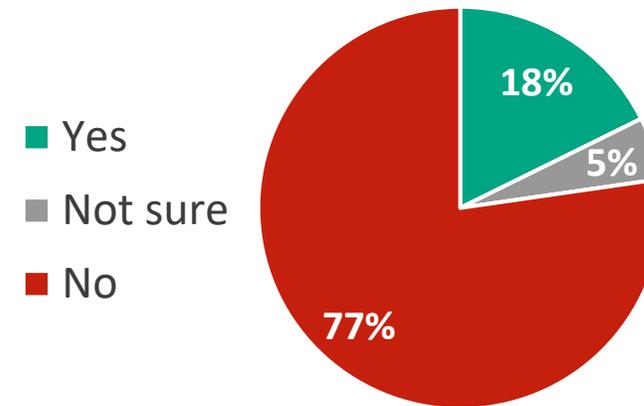
FROM INSIGHT TO INFLUENCE

Around 4 in 5 **domestic** customers are aware of WWU, and around 1 in 5 have contacted WWU before.

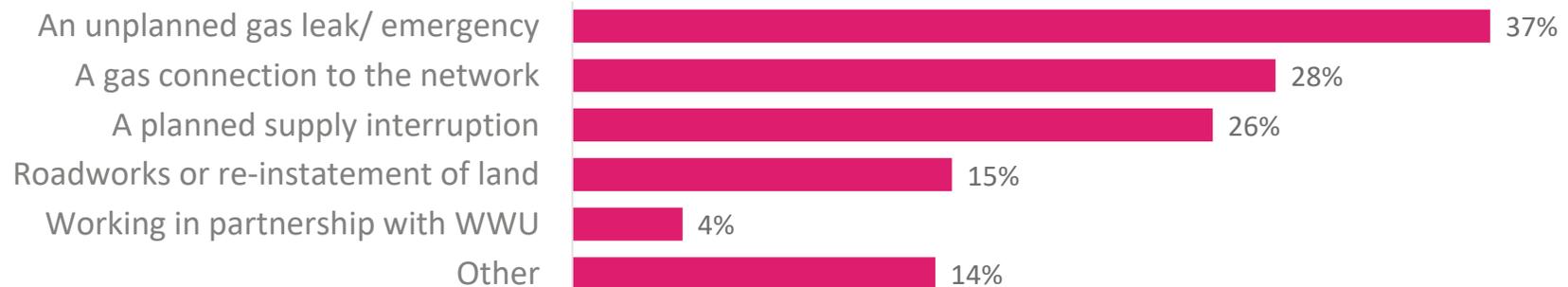
Before today, had you previously **heard** of Wales and West Utilities?



Before today, have you ever **had contact** with WWU?



On the last occasion you needed to contact WWU, what did you contact them **about**?



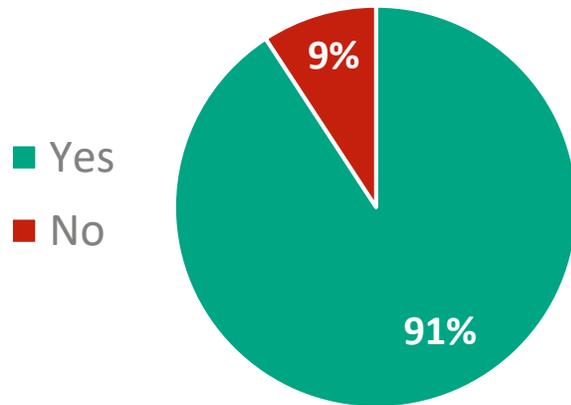
A1 Before today, had you previously heard of Wales and West Utilities? (Base domestic: 1249)

A2 How/in what places have you heard of Wales and West Utilities? (Base domestic who have heard of WWU: 1013)

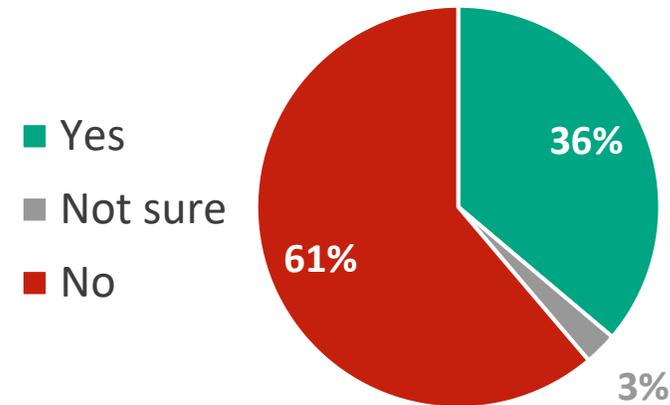
A3 And on the last occasion you needed to contact WWU, what did you contact them about? (Base domestic who have contacted WWU: 253)

**SMEs** are more likely to have heard of WWU than domestic customers, and they are twice as likely to have contacted them before, with around 1 in 3 having done so.

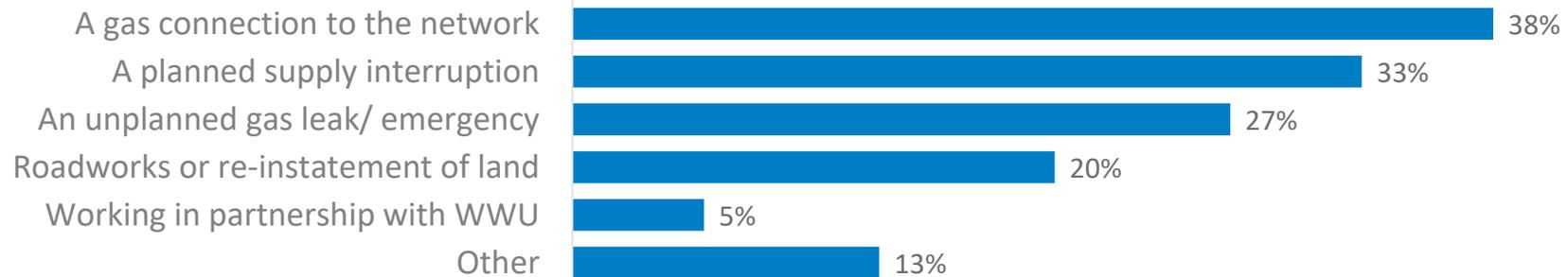
Before today, had you previously **heard** of Wales and West Utilities?



Before today, have you ever **had contact** with WWU?



On the last occasion you needed to contact WWU, what did you contact them **about**?



A1 Before today, had you previously heard of Wales and West Utilities? (Base domestic: 152)

A2 How/in what places have you heard of Wales and West Utilities? (Base domestic who have heard of WWU: 138)

A3 And on the last occasion you needed to contact WWU, what did you contact them about? (Base domestic who have contacted WWU: 55)

Acceptance scores  
by commitment

**IMPACT**

FROM INSIGHT TO INFLUENCE

# Commitments: Domestic Acceptance Scores (% agree or completely agree)

Theme	Commitment	Overall, this commitment is acceptable to me to include in the business plan	It is easy for me to understand what WWU are planning to do for this commitment	The benefits of this commitment are easy to understand	Doing this will effectively prevent the risks that could happen if WWU don't do it
Theme 1: Meeting the needs of consumers and network users	C1: Support customers as the UK moves to low carbon heating systems.	91%	92%	92%	90%
	C2: Identify and support customers who need more help to stay safe and warm.	95%	95%	95%	93%
	C3: Provide an exceptional level of service to WWU's customers, meeting their expectations.	94%	92%	94%	93%
	C4: Minimise both the number of times and for how long gas is off for when we're working or when there is an emergency.	93%	93%	93%	93%
Theme 2: Maintaining a safe and resilient network	C1: Keep people and their properties safe by making sure WWU engineers get to all reported gas leaks rapidly.	96%	96%	96%	95%
	C2: Maintain a safe and reliable gas network, while upgrading WWU's gas pipes, actively reducing carbon emissions to support the UK's environmental targets	95%	95%	95%	95%
Theme 3: Delivering value for money	C1: Safeguard WWU's data against cyber threats and only make it accessible when safe to do so.	94%	91%	91%	91%
	C2: Innovate to speed up WWU's transition to net zero and improve other areas of the business.	91%	90%	90%	90%
	C3: Reduce how much it costs us to run the business by 0.5% a year, by improving how we do things.	93%	91%	93%	90%
Theme 4: Delivering an environmentally sustainable network	C1: Help WWU's business and partners leave the environment in a better state when working in an area, such as by offering use of WWU land to community groups	92%	91%	92%	90%
	C2: Support the ecosystem by planting more native trees in their natural habitat.	95%	94%	95%	92%
	C3: Reduce its business carbon footprint (the amount of harmful carbon emissions released into the atmosphere) ahead of government targets.	91%	89%	90%	89%
Theme 5: Delivering an environmentally sustainable network - Net Zero	C1: Speed up the transition to decarbonisation (net zero), which includes delivering low carbon hydrogen as a substitute for natural gas.	90%	89%	89%	88%
	C2: Increase the amount of low carbon gas that we can transport, which is produced from organic feedstock, like vegetable waste, that would otherwise go to waste.	92%	92%	91%	91%
	C3: Lower carbon emissions by replacing up to 20% of the gas WWU transports with low carbon hydrogen.	92%	91%	91%	89%
	C4: Attract diverse and talented people who reflect the communities WWU serves, and who have or can develop the skills needed to deliver a net zero network.	90%	91%	92%	88%
	C5: Invest in improving colleagues' knowledge and skills at WWU so it can deliver a net zero ready network.	91%	90%	89%	91%

# Commitments: Domestic Acceptance Scores (% completely agree)

Theme	Commitment	Overall, this commitment is acceptable to me to include in the business plan	It is easy for me to understand what WWU are planning to do for this commitment	The benefits of this commitment are easy to understand	Doing this will effectively prevent the risks that could happen if WWU don't do it
Theme 1: Meeting the needs of consumers and network users	C1: Support customers as the UK moves to low carbon heating systems.	43%	43%	43%	36%
	C2: Identify and support customers who need more help to stay safe and warm.	51%	52%	52%	46%
	C3: Provide an exceptional level of service to WWU's customers, meeting their expectations.	48%	47%	51%	43%
	C4: Minimise both the number of times and for how long gas is off for when we're working or when there is an emergency.	50%	48%	50%	46%
Theme 2: Maintaining a safe and resilient network	C1: Keep people and their properties safe by making sure WWU engineers get to all reported gas leaks rapidly.	57%	55%	58%	52%
	C2: Maintain a safe and reliable gas network, while upgrading WWU's gas pipes, actively reducing carbon emissions to support the UK's environmental targets	56%	54%	55%	52%
Theme 3: Delivering value for money	C1: Safeguard WWU's data against cyber threats and only make it accessible when safe to do so.	44%	43%	43%	41%
	C2: Innovate to speed up WWU's transition to net zero and improve other areas of the business.	39%	40%	40%	38%
	C3: Reduce how much it costs us to run the business by 0.5% a year, by improving how we do things.	50%	47%	49%	42%
Theme 4: Delivering an environmentally sustainable network	C1: Help WWU's business and partners leave the environment in a better state when working in an area, such as by offering use of WWU land to community groups	47%	46%	49%	41%
	C2: Support the ecosystem by planting more native trees in their natural habitat.	53%	54%	53%	45%
	C3: Reduce its business carbon footprint (the amount of harmful carbon emissions released into the atmosphere) ahead of government targets.	44%	43%	44%	39%
Theme 5: Delivering an environmentally sustainable network - Net Zero	C1: Speed up the transition to decarbonisation (net zero), which includes delivering low carbon hydrogen as a substitute for natural gas.	41%	40%	41%	35%
	C2: Increase the amount of low carbon gas that we can transport, which is produced from organic feedstock, like vegetable waste, that would otherwise go to waste.	41%	41%	41%	35%
	C3: Lower carbon emissions by replacing up to 20% of the gas WWU transports with low carbon hydrogen.	47%	45%	45%	38%
	C4: Attract diverse and talented people who reflect the communities WWU serves, and who have or can develop the skills needed to deliver a net zero network.	44%	44%	43%	39%
	C5: Invest in improving colleagues' knowledge and skills at WWU so it can deliver a net zero ready network.	43%	42%	43%	37%

## Themes: Domestic Average Acceptance Scores (% completely agree)

When the % 'completely agree' responses for each commitment are averaged for each theme, we see that the most important theme, 'Maintaining a safe and resilient network', is strongest and 'delivering an environmentally sustainable network – Net Zero', the least important, is weakest for domestic customers.

Theme	Domestic Customers			
	Overall, this commitment is acceptable to me to include in the business plan	It is easy for me to understand what WWU are planning to do for this commitment	The benefits of this commitment are easy to understand	Doing this will effectively prevent the risks that could happen if WWU don't do it
% completely agree with statement				
Theme 1: Meeting the needs of consumers and network users	48%	47%	49%	43%
Theme 2: Maintaining a safe and resilient network	56%	54%	56%	52%
Theme 3: Delivering value for money	45%	43%	44%	40%
Theme 4: Delivering an environmentally sustainable network	48%	48%	49%	41%
Theme 5: Delivering an environmentally sustainable network - Net Zero	43%	42%	43%	37%

# Commitments: SME Acceptance Scores (% agree or completely agree)

Theme	Commitment	Overall, this commitment is acceptable to me to include in the business plan	It is easy for me to understand what WWU are planning to do for this commitment	The benefits of this commitment are easy to understand	Doing this will effectively prevent the risks that could happen if WWU don't do it
Theme 1: Meeting the needs of consumers and network users	C1: Support customers as the UK moves to low carbon heating systems.	95%	90%	93%	91%
	C2: Identify and support customers who need more help to stay safe and warm.	95%	97%	97%	92%
	C3: Provide an exceptional level of service to WWU's customers, meeting their expectations.	96%	96%	96%	96%
	C4: Minimise both the number of times and for how long gas is off for when we're working or when there is an emergency.	94%	94%	94%	89%
Theme 2: Maintaining a safe and resilient network	C1: Keep people and their properties safe by making sure WWU engineers get to all reported gas leaks rapidly.	97%	95%	95%	95%
	C2: Maintain a safe and reliable gas network, while upgrading WWU's gas pipes, actively reducing carbon emissions to support the UK's environmental targets	95%	93%	94%	94%
Theme 3: Delivering value for money	C1: Safeguard WWU's data against cyber threats and only make it accessible when safe to do so.	93%	93%	88%	91%
	C2: Innovate to speed up WWU's transition to net zero and improve other areas of the business.	92%	91%	88%	89%
	C3: Reduce how much it costs us to run the business by 0.5% a year, by improving how we do things.	96%	93%	94%	89%
Theme 4: Delivering an environmentally sustainable network	C1: Help WWU's business and partners leave the environment in a better state when working in an area, such as by offering use of WWU land to community groups	95%	96%	91%	90%
	C2: Support the ecosystem by planting more native trees in their natural habitat.	95%	95%	97%	95%
	C3: Reduce its business carbon footprint (the amount of harmful carbon emissions released into the atmosphere) ahead of government targets.	96%	93%	93%	91%
Theme 5: Delivering an environmentally sustainable network - Net Zero	C1: Speed up the transition to decarbonisation (net zero), which includes delivering low carbon hydrogen as a substitute for natural gas.	97%	93%	96%	93%
	C2: Increase the amount of low carbon gas that we can transport, which is produced from organic feedstock, like vegetable waste, that would otherwise go to waste.	97%	97%	91%	95%
	C3: Lower carbon emissions by replacing up to 20% of the gas WWU transports with low carbon hydrogen.	93%	90%	97%	90%
	C4: Attract diverse and talented people who reflect the communities WWU serves, and who have or can develop the skills needed to deliver a net zero network.	96%	96%	96%	95%
	C5: Invest in improving colleagues' knowledge and skills at WWU so it can deliver a net zero ready network.	97%	95%	95%	93%

# Commitments: SME Acceptance Scores (% completely agree)

Theme	Commitment	Overall, this commitment is acceptable to me to include in the business plan	It is easy for me to understand what WWU are planning to do for this commitment	The benefits of this commitment are easy to understand	Doing this will effectively prevent the risks that could happen if WWU don't do it
Theme 1: Meeting the needs of consumers and network users	C1: Support customers as the UK moves to low carbon heating systems.	61%	53%	49%	42%
	C2: Identify and support customers who need more help to stay safe and warm.	50%	50%	50%	41%
	C3: Provide an exceptional level of service to WWU's customers, meeting their expectations.	56%	54%	53%	42%
	C4: Minimise both the number of times and for how long gas is off for when we're working or when there is an emergency.	50%	47%	61%	42%
Theme 2: Maintaining a safe and resilient network	C1: Keep people and their properties safe by making sure WWU engineers get to all reported gas leaks rapidly.	59%	53%	60%	50%
	C2: Maintain a safe and reliable gas network, while upgrading WWU's gas pipes, actively reducing carbon emissions to support the UK's environmental targets	53%	47%	52%	53%
Theme 3: Delivering value for money	C1: Safeguard WWU's data against cyber threats and only make it accessible when safe to do so.	48%	52%	48%	38%
	C2: Innovate to speed up WWU's transition to net zero and improve other areas of the business.	51%	51%	52%	40%
	C3: Reduce how much it costs us to run the business by 0.5% a year, by improving how we do things.	51%	56%	53%	43%
Theme 4: Delivering an environmentally sustainable network	C1: Help WWU's business and partners leave the environment in a better state when working in an area, such as by offering use of WWU land to community groups	53%	52%	54%	43%
	C2: Support the ecosystem by planting more native trees in their natural habitat.	55%	58%	55%	42%
	C3: Reduce its business carbon footprint (the amount of harmful carbon emissions released into the atmosphere) ahead of government targets.	52%	51%	52%	44%
Theme 5: Delivering an environmentally sustainable network - Net Zero	C1: Speed up the transition to decarbonisation (net zero), which includes delivering low carbon hydrogen as a substitute for natural gas.	56%	54%	55%	45%
	C2: Increase the amount of low carbon gas that we can transport, which is produced from organic feedstock, like vegetable waste, that would otherwise go to waste.	47%	51%	45%	40%
	C3: Lower carbon emissions by replacing up to 20% of the gas WWU transports with low carbon hydrogen.	48%	53%	55%	45%
	C4: Attract diverse and talented people who reflect the communities WWU serves, and who have or can develop the skills needed to deliver a net zero network.	59%	54%	57%	43%
	C5: Invest in improving colleagues' knowledge and skills at WWU so it can deliver a net zero ready network.	46%	46%	49%	34%

## Themes: SME Average Acceptance Scores (% completely agree)

‘Maintaining a safe and resilient network’ is consistently strong for SME customers, but ‘Meeting the needs of consumers and network users’ and ‘delivering an environmentally sustainable network – Net Zero’ are also strong. ‘Value for money’, the most important theme for SME customers, is the least strong.

Theme	SME Customers			
	Overall, this commitment is acceptable to me to include in the business plan	It is easy for me to understand what WWU are planning to do for this commitment	The benefits of this commitment are easy to understand	Doing this will effectively prevent the risks that could happen if WWU don't do it
% completely agree with statement				
Theme 1: Meeting the needs of consumers and network users	54%	51%	53%	42%
Theme 2: Maintaining a safe and resilient network	56%	50%	56%	51%
Theme 3: Delivering value for money	50%	53%	51%	41%
Theme 4: Delivering an environmentally sustainable network	53%	54%	54%	43%
Theme 5: Delivering an environmentally sustainable network - Net Zero	51%	52%	52%	41%

Theme 1:  
Meeting the needs of  
consumers and network  
users

**IMPACT**

FROM INSIGHT TO INFLUENCE

## C1: Support customers as the UK moves to low carbon heating systems.

	Overall, this commitment is <b>acceptable to me</b> to include in the business plan		It is easy for me to understand <b>what WWU are planning to do</b> for this commitment		The <b>benefits of this commitment</b> are easy to understand		Doing this will effectively <b>prevent the risks</b> that could happen if WWU don't do it	
	Domestic	SME	Domestic	SME	Domestic	SME	Domestic	SME
<i>Commitment</i> <b>% T2B</b>	91%	95%	92%	90%	92%	93%	90%	91%
<i>Theme average</i> <b>% Completely agree</b>	48%	54%	47%	51%	49%	53%	43%	42%
<i>Commitment</i> <b>% Completely agree</b>	43%	61%	43%	53%	43%	49%	36%	42%

Theme 1: Meeting the needs of consumers and network users

## C2: Identify and support customers who need more help to stay safe and warm.

	Overall, this commitment is <b>acceptable to me</b> to include in the business plan		It is easy for me to understand <b>what WWU are planning to do</b> for this commitment		The <b>benefits of this commitment</b> are easy to understand		Doing this will effectively <b>prevent the risks</b> that could happen if WWU don't do it	
	Domestic	SME	Domestic	SME	Domestic	SME	Domestic	SME
<i>Commitment</i> <b>% T2B</b>	95%	95%	95%	97%	95%	97%	93%	92%
<i>Theme average</i> <b>% Completely agree</b>	48%	54%	47%	51%	49%	53%	43%	42%
<i>Commitment</i> <b>% Completely agree</b>	51%	50%	52%	50%	52%	50%	46%	41%

Theme 1: Meeting the needs of consumers and network users

C3: Provide an exceptional level of service to WWU’s customers, meeting their expectations.

	Overall, this commitment is <b>acceptable to me</b> to include in the business plan		It is easy for me to understand <b>what WWU are planning to do</b> for this commitment		The <b>benefits of this commitment</b> are easy to understand		Doing this will effectively <b>prevent the risks</b> that could happen if WWU don’t do it	
	Domestic	SME	Domestic	SME	Domestic	SME	Domestic	SME
<i>Commitment</i> <b>% T2B</b>	94%	96%	92%	96%	94%	96%	93%	96%
<i>Theme average</i> <b>% Completely agree</b>	48%	54%	47%	51%	49%	53%	43%	42%
<i>Commitment</i> <b>% Completely agree</b>	48%	56%	47%	54%	51%	53%	43%	42%

Theme 1: Meeting the needs of consumers and network users

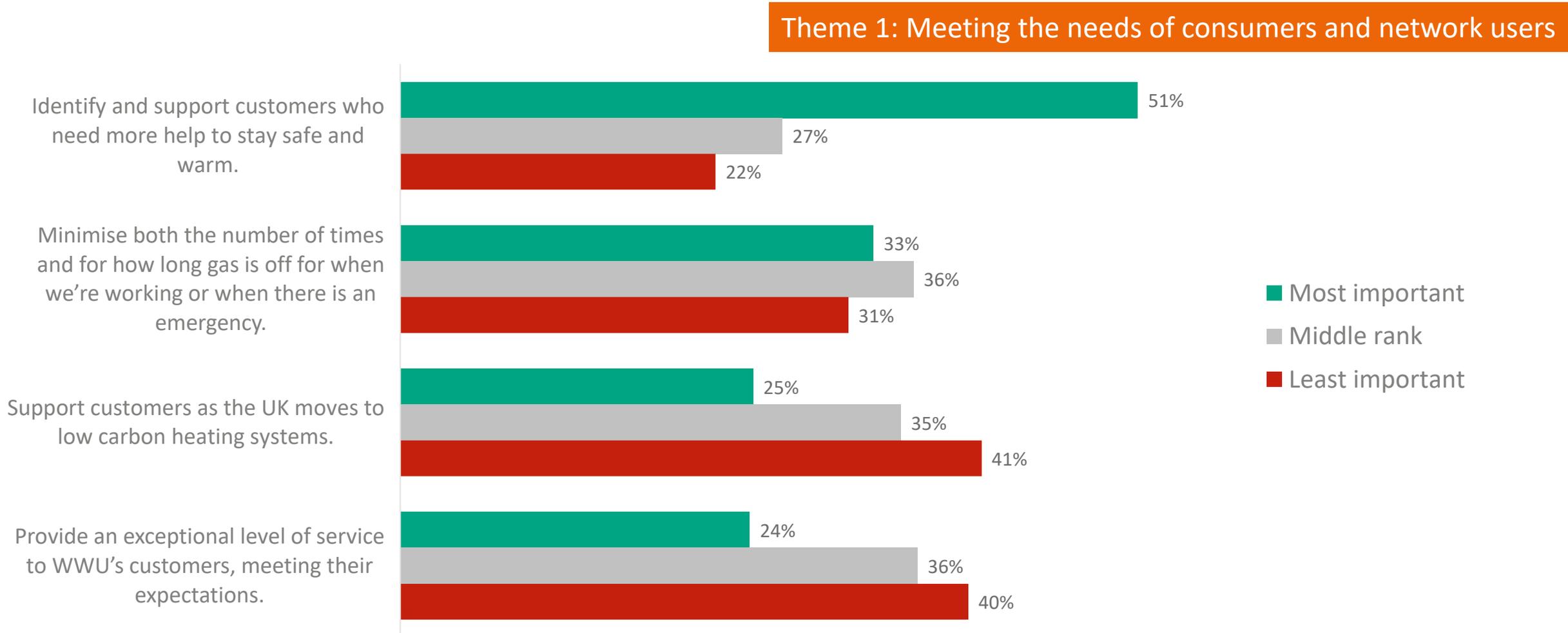
C4: Minimise both the number of times and for how long gas is off for when we're working or when there is an emergency.

	Overall, this commitment is <b>acceptable to me</b> to include in the business plan		It is easy for me to understand <b>what WWU are planning to do</b> for this commitment		The <b>benefits of this commitment</b> are easy to understand		Doing this will effectively <b>prevent the risks</b> that could happen if WWU don't do it	
	Domestic	SME	Domestic	SME	Domestic	SME	Domestic	SME
<i>Commitment</i> <b>% T2B</b>	93%	94%	93%	94%	93%	94%	93%	89%
<i>Theme average</i> <b>% Completely agree</b>	48%	54%	47%	51%	49%	53%	43%	42%
<i>Commitment</i> <b>% Completely agree</b>	50%	50%	48%	47%	50%	61%	46%	42%

Theme 1: Meeting the needs of consumers and network users

# Meeting the needs of consumers and network users commitments ranking - domestic

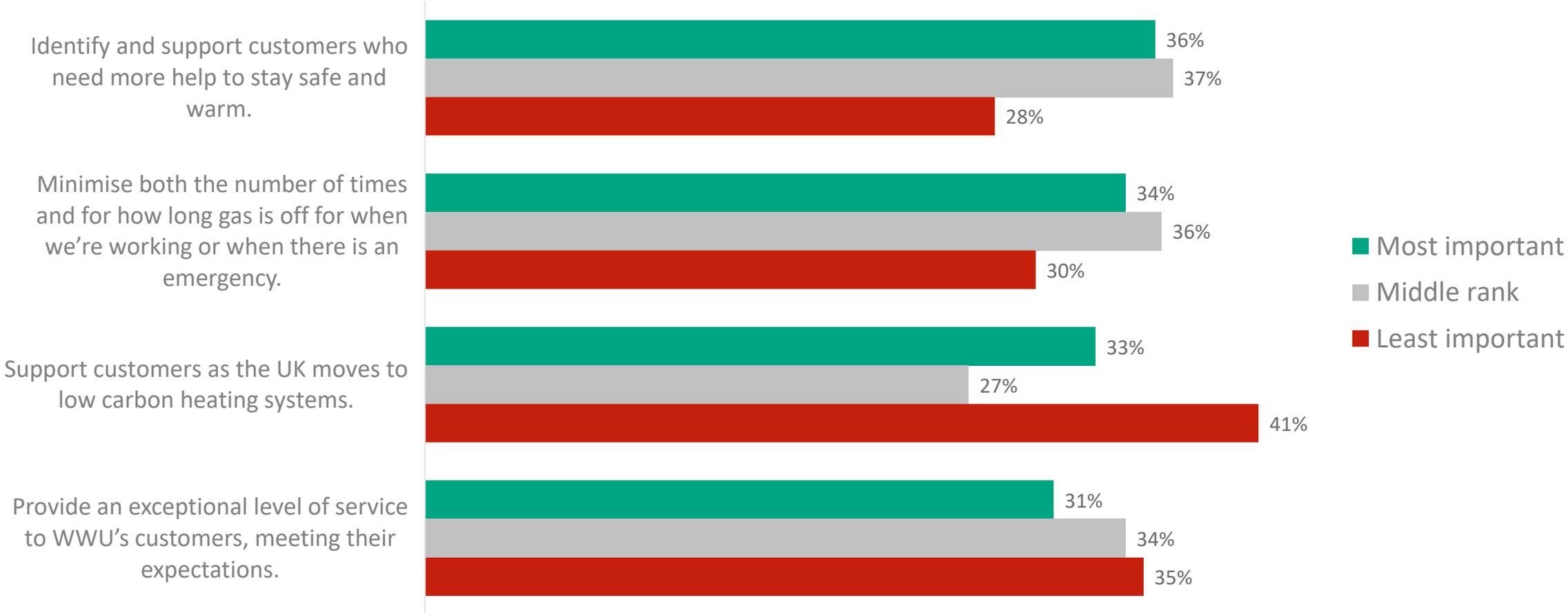
Domestic customers ranked identifying and supporting customers who need more help to stay safe and warm is ranked the most important commitment within this theme.



# Meeting the needs of consumers and network users commitments ranking - SMEs

SMEs were split in terms of which commitment was most important within this theme, with identifying and supporting customers who need more help to stay safe being first by a slim margin.

## Theme 1: Meeting the needs of consumers and network users



# Theme 2: Maintaining a safe and resilient network

**IMPACT**

FROM INSIGHT TO INFLUENCE

C1: Keep people and their properties safe by making sure WWU engineers get to all reported gas leaks rapidly.

	Overall, this commitment is <b>acceptable to me</b> to include in the business plan		It is easy for me to understand <b>what WWU are planning to do</b> for this commitment		The <b>benefits of this commitment</b> are easy to understand		Doing this will effectively <b>prevent the risks</b> that could happen if WWU don't do it	
	Domestic	SME	Domestic	SME	Domestic	SME	Domestic	SME
<i>Commitment</i> <b>% T2B</b>	96%	97%	96%	95%	96%	95%	95%	95%
<i>Theme average</i> <b>% Completely agree</b>	56%	56%	54%	50%	56%	56%	52%	51%
Commitment <b>% Completely agree</b>	57%	59%	55%	53%	58%	60%	52%	50%

Theme 2: Maintaining a safe and resilient network

C2: Maintain a safe and reliable gas network, while upgrading WWU's gas pipes, actively reducing carbon emissions to support the UK's environmental targets.

	Overall, this commitment is <b>acceptable to me</b> to include in the business plan		It is easy for me to understand <b>what WWU are planning to do</b> for this commitment		The <b>benefits of this commitment</b> are easy to understand		Doing this will effectively <b>prevent the risks</b> that could happen if WWU don't do it	
	Domestic	SME	Domestic	SME	Domestic	SME	Domestic	SME
<i>Commitment</i> <b>% T2B</b>	95%	95%	95%	93%	95%	94%	95%	94%
<i>Theme average</i> <b>% Completely agree</b>	56%	56%	54%	50%	56%	56%	52%	51%
Commitment <b>% Completely agree</b>	56%	53%	54%	47%	55%	52%	52%	53%

Theme 2: Maintaining a safe and resilient network

# Maintain a safe and resilient network commitments ranking - domestic

Domestic customers ranked keeping people and their properties safe by making sure WWU engineers get to all reported gas leaks rapidly as the more important commitment in this theme.

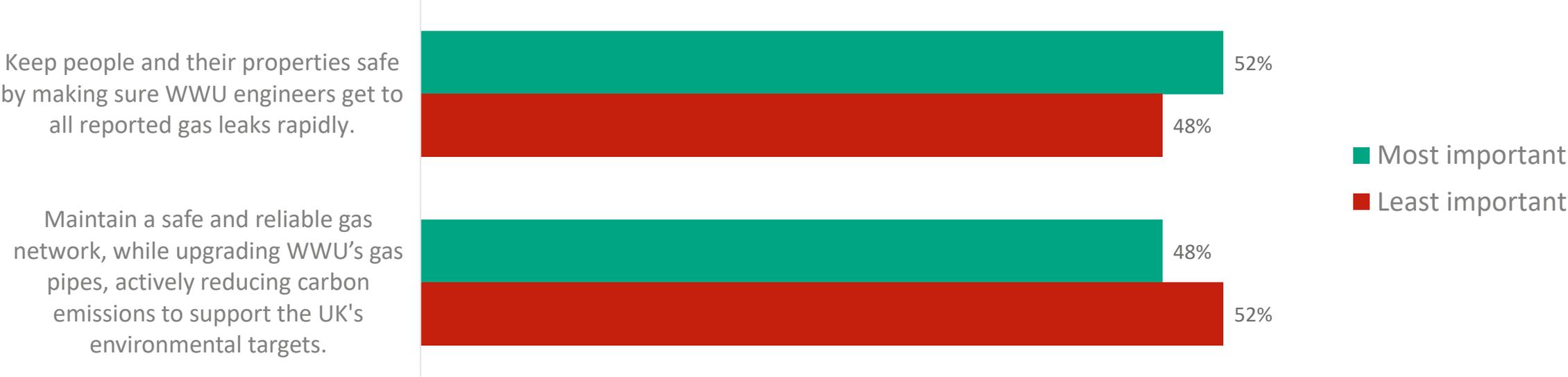
## Theme 2: Maintaining a safe and resilient network



# Maintain a safe and resilient network commitments ranking - SMEs

SMEs were split in terms of which commitment was most important within this theme, with keeping people and their properties safe by making sure WWU engineers get to all reported gas leaks rapidly being first by a slim margin.

## Theme 2: Maintaining a safe and resilient network



# Theme 3: Delivering value for money

**IMPACT**  
FROM INSIGHT TO INFLUENCE

C1: Safeguard WWU's data against cyber threats and only make it accessible when safe to do so.

	Overall, this commitment is <b>acceptable to me</b> to include in the business plan		It is easy for me to understand <b>what WWU are planning to do</b> for this commitment		The <b>benefits of this commitment</b> are easy to understand		Doing this will effectively <b>prevent the risks</b> that could happen if WWU don't do it	
	Domestic	SME	Domestic	SME	Domestic	SME	Domestic	SME
<i>Commitment</i> <b>% T2B</b>	94%	93%	91%	93%	91%	88%	91%	91%
<i>Theme average</i> <b>% Completely agree</b>	45%	50%	43%	53%	44%	51%	40%	41%
<i>Commitment</i> <b>% Completely agree</b>	44%	48%	43%	52%	43%	48%	41%	38%

### Theme 3: Delivering value for money

C2: Innovate to speed up WWU’s transition to net zero and improve other areas of the business.

	Overall, this commitment is <b>acceptable to me</b> to include in the business plan		It is easy for me to understand <b>what WWU are planning to do</b> for this commitment		The <b>benefits of this commitment</b> are easy to understand		Doing this will effectively <b>prevent the risks</b> that could happen if WWU don’t do it	
	Domestic	SME	Domestic	SME	Domestic	SME	Domestic	SME
<i>Commitment</i> <b>% T2B</b>	91%	92%	90%	91%	90%	88%	90%	89%
<i>Theme average</i> <b>% Completely agree</b>	45%	50%	43%	53%	44%	51%	40%	41%
<i>Commitment</i> <b>% Completely agree</b>	39%	51%	40%	51%	40%	52%	38%	40%

Theme 3: Delivering value for money

C3: Reduce how much it costs us to run the business by 0.5% a year, by improving how we do things.

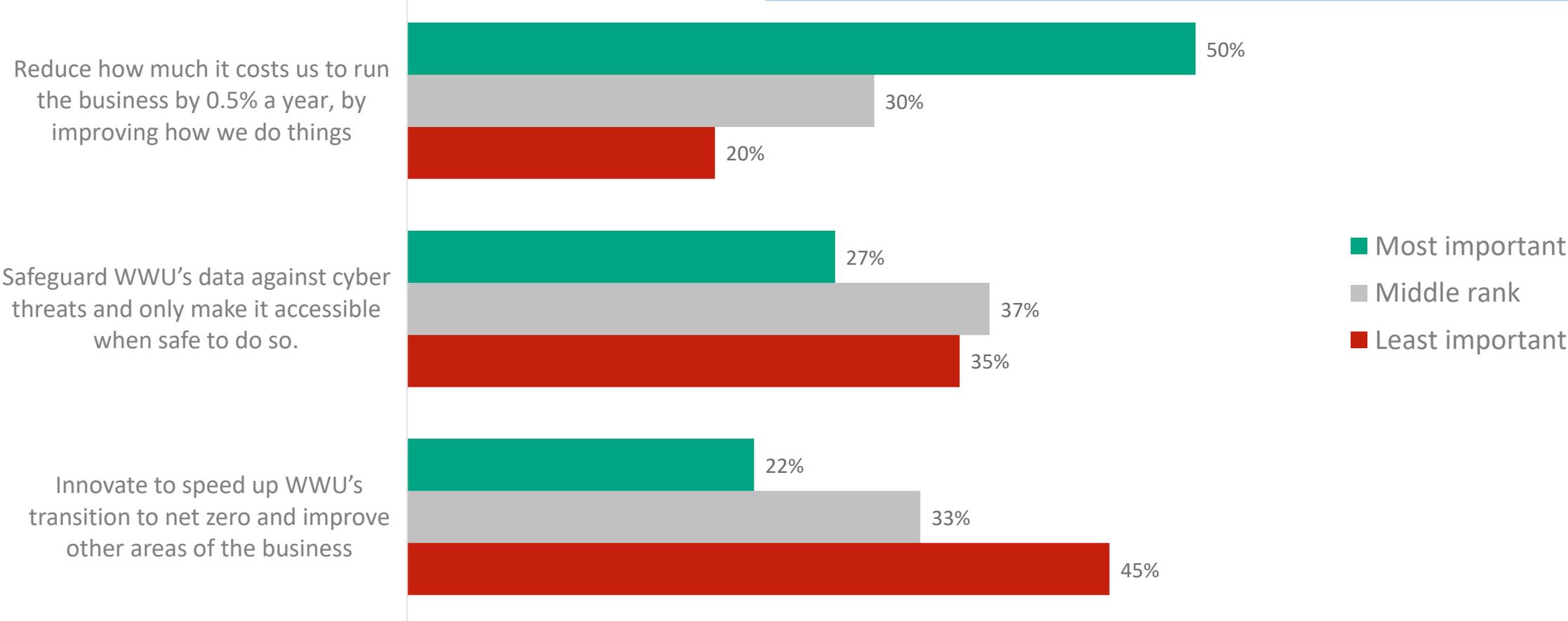
	Overall, this commitment is <b>acceptable to me</b> to include in the business plan		It is easy for me to understand <b>what WWU are planning to do</b> for this commitment		The <b>benefits of this commitment</b> are easy to understand		Doing this will effectively <b>prevent the risks</b> that could happen if WWU don't do it	
	Domestic	SME	Domestic	SME	Domestic	SME	Domestic	SME
<i>Commitment</i> <b>% T2B</b>	93%	96%	91%	93%	93%	94%	90%	89%
<i>Theme average</i> <b>% Completely agree</b>	45%	50%	43%	53%	44%	51%	40%	41%
<i>Commitment</i> <b>% Completely agree</b>	50%	51%	47%	56%	49%	53%	42%	43%

### Theme 3: Delivering value for money

# Delivering value for money commitments ranking - domestic

Domestic customers ranked reducing how much it costs to run the business by 0.5% a year, through improving how things are done as the most important commitment in this theme.

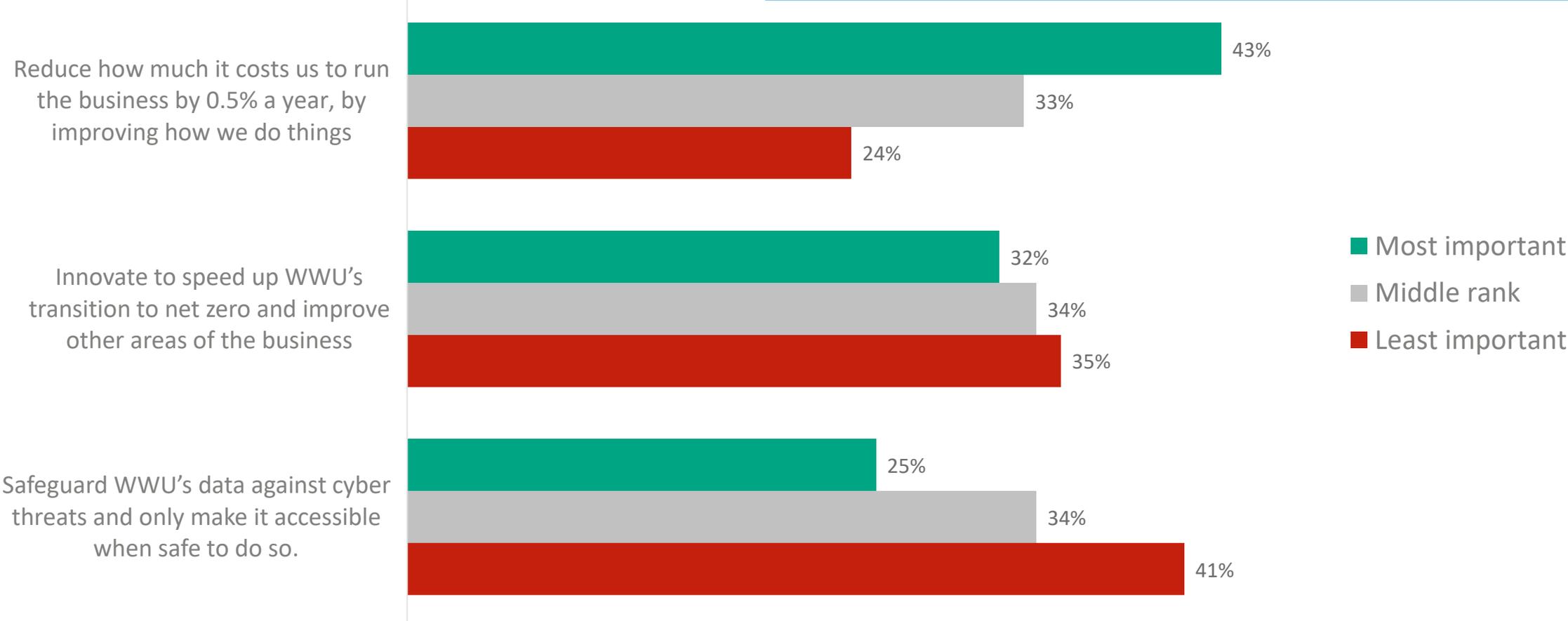
## Theme 3: Delivering value for money



# Delivering value for money commitments ranking - SMEs

SMEs ranked reducing how much it costs to run the business by 0.5% a year, through improving how things are done as the most important commitment in this theme.

## Theme 3: Delivering value for money



# Theme 4: Delivering an environmentally sustainable network

**IMPACT**

FROM INSIGHT TO INFLUENCE

C1: Help WWU’s business and partners leave the environment in a better state when working in an area, such as by offering WWU land to community groups.

	Overall, this commitment is <b>acceptable to me</b> to include in the business plan		It is easy for me to understand <b>what WWU are planning to do</b> for this commitment		The <b>benefits of this commitment</b> are easy to understand		Doing this will effectively <b>prevent the risks</b> that could happen if WWU don’t do it	
	Domestic	SME	Domestic	SME	Domestic	SME	Domestic	SME
<i>Commitment</i> <b>% T2B</b>	92%	95%	91%	96%	92%	91%	90%	90%
<i>Theme average</i> <b>% Completely agree</b>	48%	53%	48%	54%	49%	54%	41%	43%
<i>Commitment</i> <b>% Completely agree</b>	47%	53%	46%	52%	49%	54%	41%	43%

Theme 4: Delivering an environmentally sustainable network

## C2: Support the ecosystem by planting more native trees in their natural habitat.

	Overall, this commitment is <b>acceptable to me</b> to include in the business plan		It is easy for me to understand <b>what WWU are planning to do</b> for this commitment		The <b>benefits of this commitment</b> are easy to understand		Doing this will effectively <b>prevent the risks</b> that could happen if WWU don't do it	
	Domestic	SME	Domestic	SME	Domestic	SME	Domestic	SME
<i>Commitment</i> <b>% T2B</b>	95%	95%	94%	95%	95%	97%	92%	95%
<i>Theme average</i> <b>% Completely agree</b>	48%	53%	48%	54%	49%	54%	41%	43%
<i>Commitment</i> <b>% Completely agree</b>	53%	55%	54%	58%	53%	55%	45%	42%

### Theme 4: Delivering an environmentally sustainable network

C3: Reduce its business carbon footprint (the amount of harmful carbon emissions released into the atmosphere) ahead of government targets.

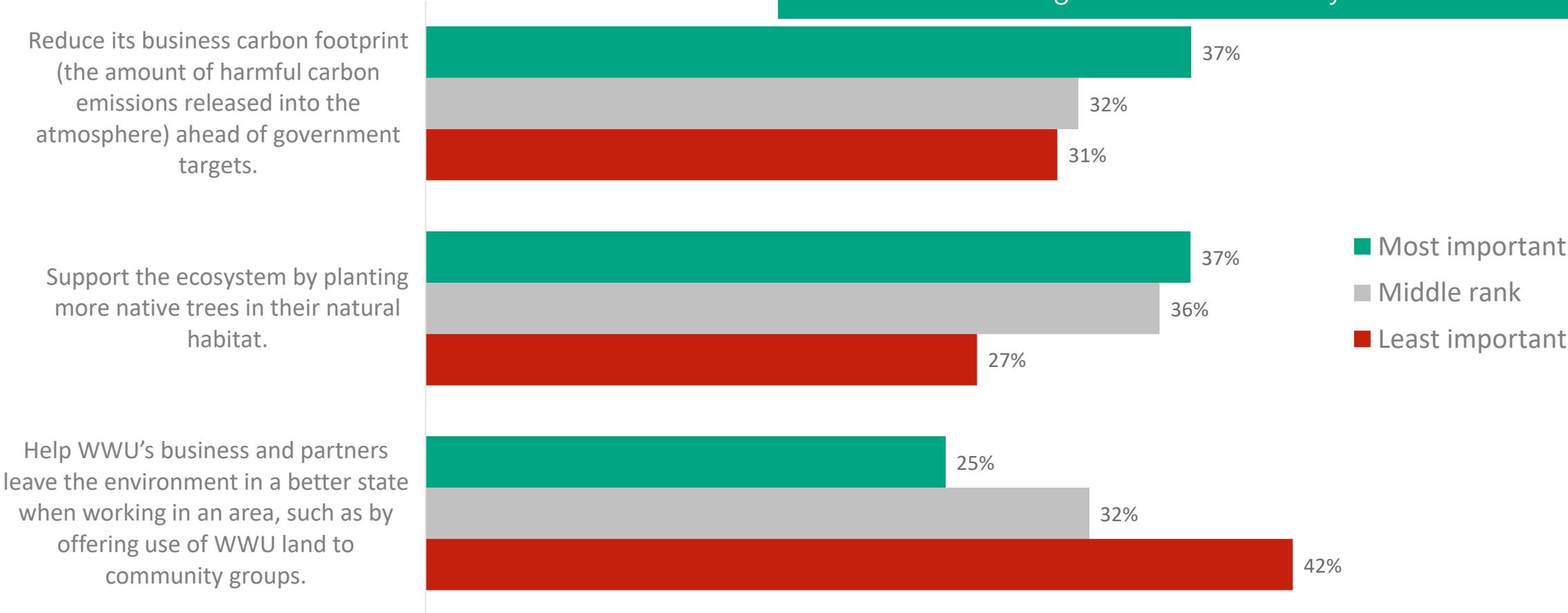
	Overall, this commitment is <b>acceptable to me</b> to include in the business plan		It is easy for me to understand <b>what WWU are planning to do</b> for this commitment		The <b>benefits of this commitment</b> are easy to understand		Doing this will effectively <b>prevent the risks</b> that could happen if WWU don't do it	
	Domestic	SME	Domestic	SME	Domestic	SME	Domestic	SME
<i>Commitment</i> <b>% T2B</b>	91%	96%	89%	93%	90%	93%	89%	91%
<i>Theme average</i> <b>% Completely agree</b>	48%	53%	48%	54%	49%	54%	41%	43%
<i>Commitment</i> <b>% Completely agree</b>	44%	52%	43%	51%	44%	52%	39%	44%

Theme 4: Delivering an environmentally sustainable network

# Delivering an environmentally sustainable network commitments ranking - domestic

Domestic customers were split between reducing business carbon footprint and supporting the ecosystem as the most important commitments within this theme.

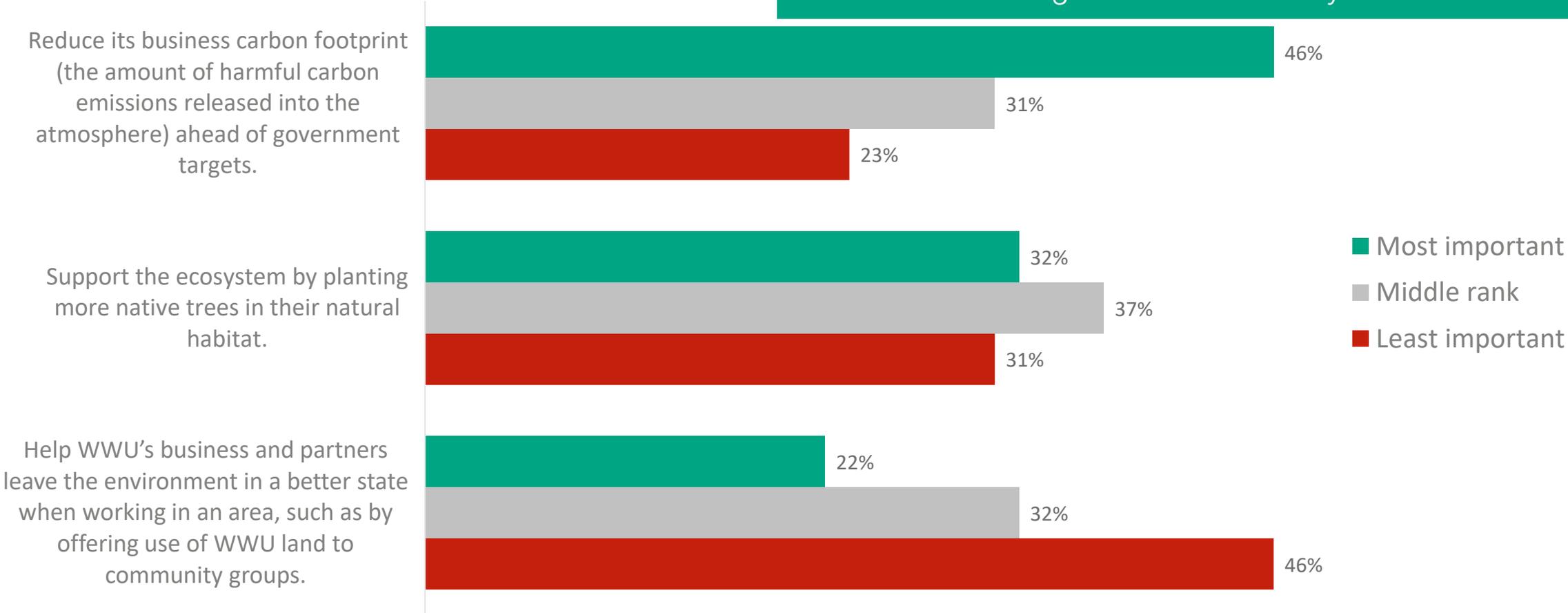
## Theme 4: Delivering an environmentally sustainable network



# Delivering an environmentally sustainable network commitments ranking - SMEs

SMEs ranked reducing business carbon footprint ahead of government targets as the most important commitment within this theme.

## Theme 4: Delivering an environmentally sustainable network



# Theme 5: Delivering an environmentally sustainable network - Net Zero

**IMPACT**

FROM INSIGHT TO INFLUENCE

C1: Speed up the transition to decarbonisation (net zero), which includes delivering low carbon hydrogen as a substitute for natural gas.

	Overall, this commitment is <b>acceptable to me</b> to include in the business plan		It is easy for me to understand <b>what WWU are planning to do</b> for this commitment		The <b>benefits of this commitment</b> are easy to understand		Doing this will effectively <b>prevent the risks</b> that could happen if WWU don't do it	
	Domestic	SME	Domestic	SME	Domestic	SME	Domestic	SME
<i>Commitment</i> <b>% T2B</b>	90%	97%	89%	93%	89%	96%	88%	93%
<i>Theme average</i> <b>% Completely agree</b>	43%	51%	42%	52%	43%	52%	37%	41%
<i>Commitment</i> <b>% Completely agree</b>	41%	56%	40%	54%	41%	55%	35%	45%

Theme 5: Delivering an environmentally sustainable network - Net Zero

C2: Increase the amount of low carbon gas that we can transport, which is produced from organic feedstock, like vegetable waste, that would otherwise go to waste.

	Overall, this commitment is <b>acceptable to me</b> to include in the business plan		It is easy for me to understand <b>what WWU are planning to do</b> for this commitment		The <b>benefits of this commitment</b> are easy to understand		Doing this will effectively <b>prevent the risks</b> that could happen if WWU don't do it	
	Domestic	SME	Domestic	SME	Domestic	SME	Domestic	SME
<i>Commitment</i> <b>% T2B</b>	92%	97%	92%	97%	91%	91%	91%	95%
<i>Theme average</i> <b>% Completely agree</b>	43%	51%	42%	52%	43%	52%	37%	41%
<i>Commitment</i> <b>% Completely agree</b>	41%	47%	41%	51%	41%	45%	35%	40%

Theme 5: Delivering an environmentally sustainable network - Net Zero

## C3: Lower carbon emissions by replacing up to 20% of the gas WWU transports with low carbon hydrogen.

	Overall, this commitment is <b>acceptable to me</b> to include in the business plan		It is easy for me to understand <b>what WWU are planning to do</b> for this commitment		The <b>benefits of this commitment</b> are easy to understand		Doing this will effectively <b>prevent the risks</b> that could happen if WWU don't do it	
	Domestic	SME	Domestic	SME	Domestic	SME	Domestic	SME
<i>Commitment</i> <b>% T2B</b>	92%	93%	91%	90%	91%	97%	89%	90%
<i>Theme average</i> <b>% Completely agree</b>	43%	51%	42%	52%	43%	52%	37%	41%
<i>Commitment</i> <b>% Completely agree</b>	47%	48%	45%	53%	45%	55%	38%	45%

Theme 5: Delivering an environmentally sustainable network - Net Zero

C4: Attract diverse and talented people who reflect the communities WWU serves, and who have or can develop the skills needed to deliver a net zero network.

	Overall, this commitment is <b>acceptable to me</b> to include in the business plan		It is easy for me to understand <b>what WWU are planning to do</b> for this commitment		The <b>benefits of this commitment</b> are easy to understand		Doing this will effectively <b>prevent the risks</b> that could happen if WWU don't do it	
	Domestic	SME	Domestic	SME	Domestic	SME	Domestic	SME
<i>Commitment</i> <b>% T2B</b>	90%	96%	91%	96%	92%	96%	88%	95%
<i>Theme average</i> <b>% Completely agree</b>	43%	51%	42%	52%	43%	52%	37%	41%
<i>Commitment</i> <b>% Completely agree</b>	44%	59%	44%	54%	43%	57%	39%	43%

Theme 5: Delivering an environmentally sustainable network - Net Zero

C5: Invest in improving colleagues' knowledge and skills at WWU so it can deliver a net zero ready network.

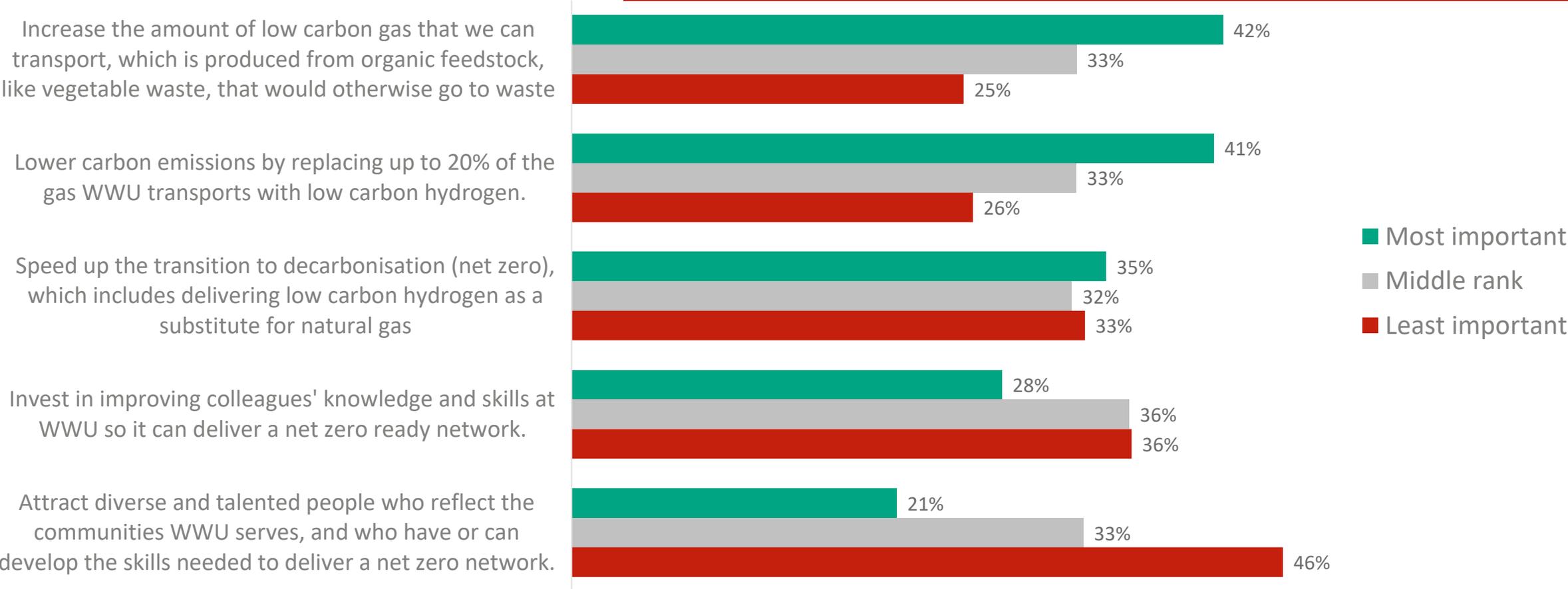
	Overall, this commitment is <b>acceptable to me</b> to include in the business plan		It is easy for me to understand <b>what WWU are planning to do</b> for this commitment		The <b>benefits of this commitment</b> are easy to understand		Doing this will effectively <b>prevent the risks</b> that could happen if WWU don't do it	
	Domestic	SME	Domestic	SME	Domestic	SME	Domestic	SME
<i>Commitment</i> <b>% T2B</b>	91%	97%	90%	95%	89%	95%	91%	93%
<i>Theme average</i> <b>% Completely agree</b>	43%	51%	42%	52%	43%	52%	37%	41%
<i>Commitment</i> <b>% Completely agree</b>	43%	46%	42%	46%	43%	49%	37%	34%

Theme 5: Delivering an environmentally sustainable network - Net Zero

# Delivering an environmentally sustainable network (net zero) commitments ranking - domestic

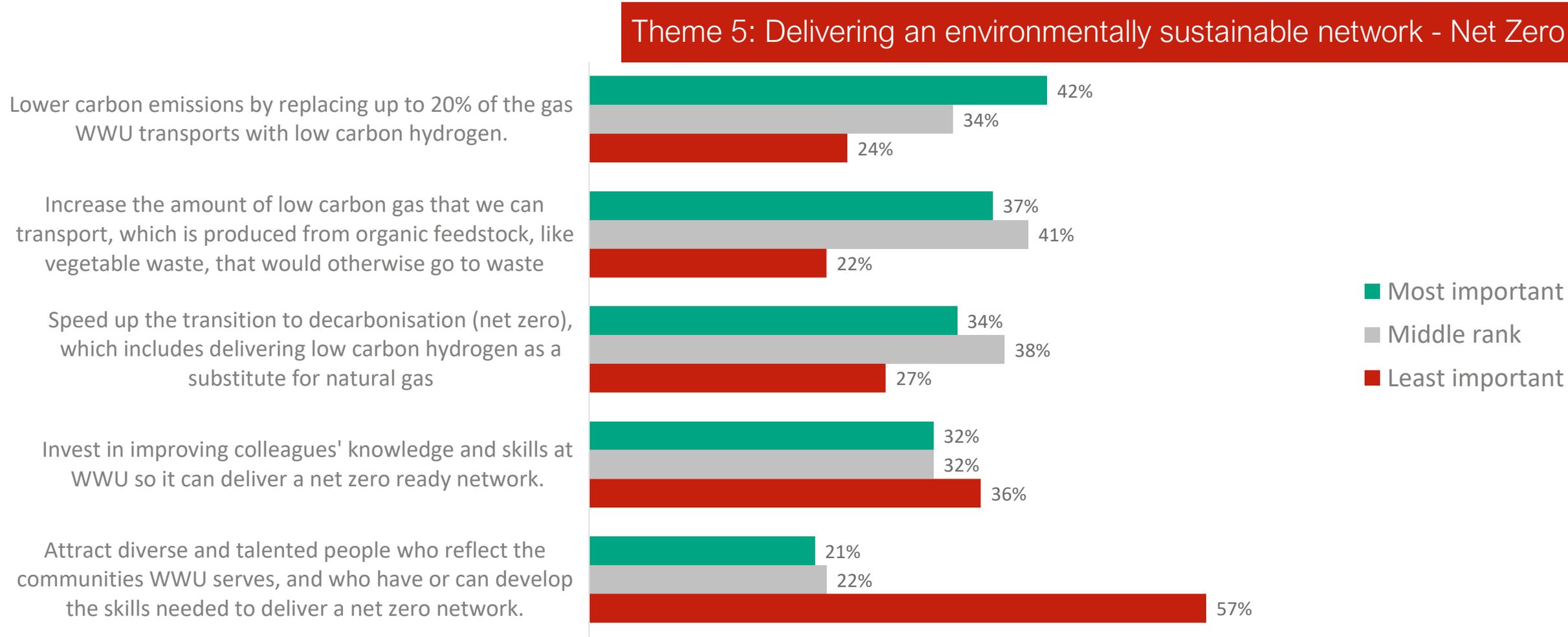
Domestic customers ranked increasing the amount of transportable low carbon gas as the most important commitment within this theme, closely followed by lowering carbon emissions through transporting more low carbon hydrogen.

## Theme 5: Delivering an environmentally sustainable network - Net Zero



# Delivering an environmentally sustainable network (net zero) commitments ranking - SMEs

SMEs ranked increasing the amount of transportable low carbon gas as the most important commitment within this theme.



DEMOGRAPHICS

**IMPACT**

FROM INSIGHT TO INFLUENCE

1,169 domestic bill-paying customers, 152 SMEs and 80 future bill payers from Wales and England completed the questionnaire



5% Future bill payers  
 84% Bill-paying Customers  
 11% SMEs

**Total sample %**

- Bristol, Gloucester, Somerset & Wiltshire: 2%
- Devon & Cornwall: 1%
- North & Mid Wales: 1%
- South Wales: 2%

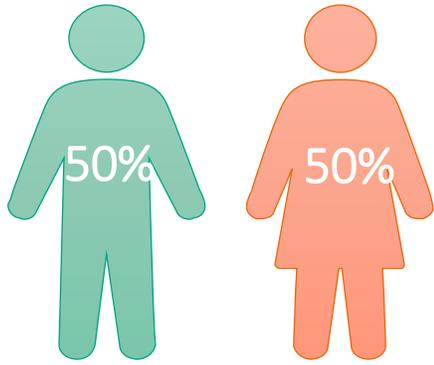
- Bristol, Gloucester, Somerset & Wiltshire: 24%
- Devon & Cornwall: 19%
- North & Mid Wales: 11%
- South Wales: 30%

- Bristol, Gloucester, Somerset & Wiltshire: 3%
- Devon & Cornwall: 2%
- North & Mid Wales: 1%
- South Wales: 4%

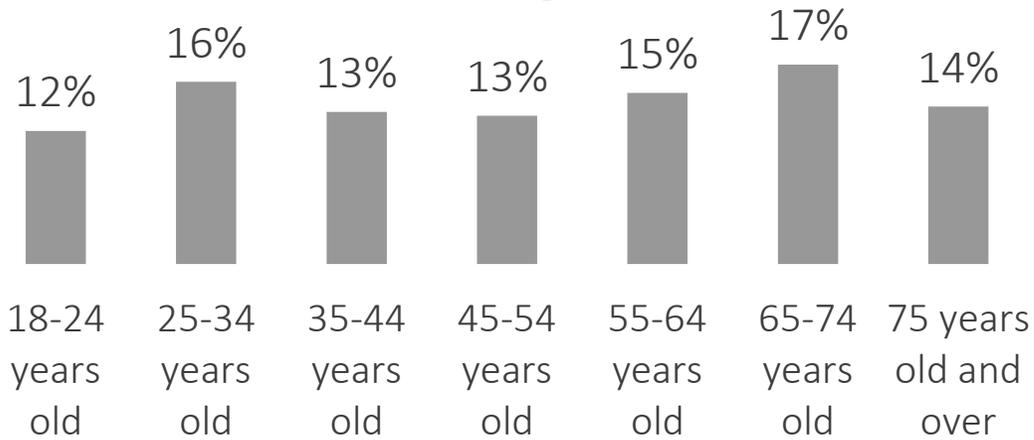
S2b Are you a business decision maker (i.e. make purchasing and contract decisions on behalf of a business)? Base: those in paid employment (863)  
 S3 How much involvement, if any, do you have in choosing and managing the energy supply/bills for your business? Base: Business decision makers (445)  
 S4 How many people work at your organisation? If you have more than one business premises, please include these in your estimation. Base: those who manager business energy bills (417)  
 S9. Please specify which area you work/live in. Base: All (1401)

# DEMOGRAPHICS (Domestic)

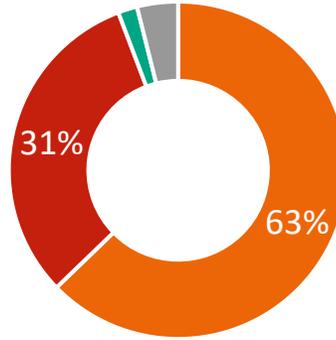
## Gender



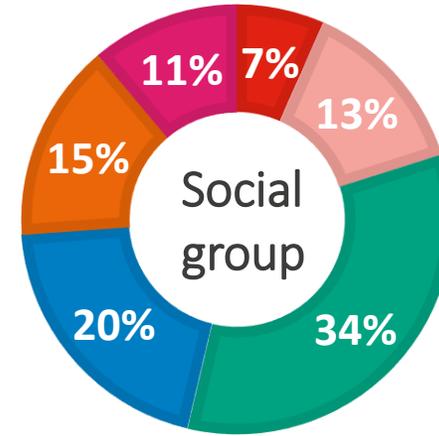
## Age



# Bill Payment Responsibility

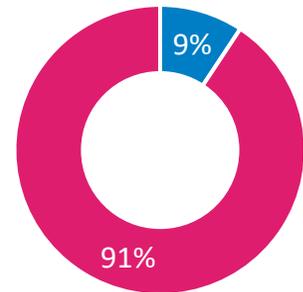


- Complete responsibility for payment
- Share responsibility for payment with others in household
- No responsibility, but included in rent
- No responsibility, someone else pays



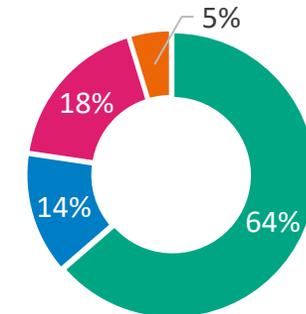
- A: High Managerial, admin or professional
- B: Intermediate managerial, admin or professional
- C1: Supervisory, clerical and junior managerial, admin or professional
- C2: Skilled manual workers
- D: Semi and unskilled manual workers
- E: State pensioners, casual/lowest grade workers, unemployed with state pension

## Ethnicity



- Ethnic minority
- Not ethnic minority

## Accommodation



- Homeowner
- Local authority housing
- Private rented
- Other

S10 What is your age? Base: Domestic (1249)

D3: Are you the person, or one of the people, in your household who is responsible for the household utilities bills (such as electricity, water and gas)? Base: Domestic (1249)

D1: what is your gender? below. Base: Domestic (1249)

D2: Which of the following best describes your ethnicity? Base: Domestic (1249)

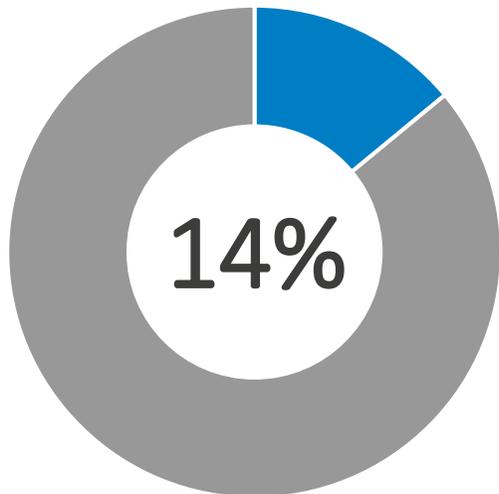
D6: Which ONE of the following categories best describes the employment status of the Chief Income Earner (CIE) in your household? Base: Domestic (1249)

D11: Which of the following best describes your home situation? If you have more than one home, please answer based on where you spend most of your time. Base: Domestic (1249)

# VULNERABLE CLASSIFICATION

53% of domestic households were classified as vulnerable

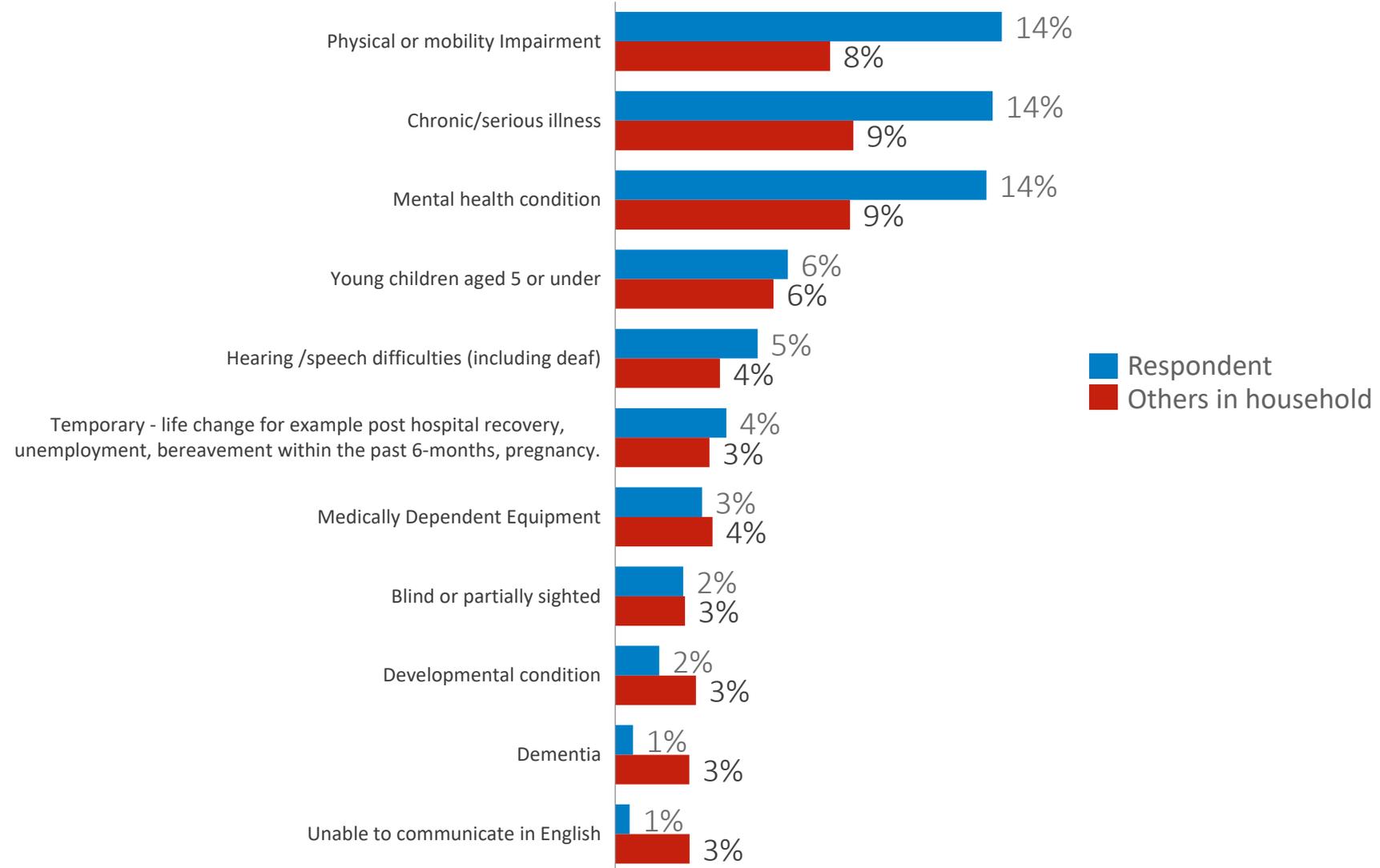
Domestic customers aged 75+



S10 What is your age? Base: Domestic (1249)

D10 For various reasons, people sometimes need extra help or support with their daily routines. Do you feel that any of the following factors apply to you or anyone else in your household at the moment that might mean you need extra support? Base: Domestic (1249)

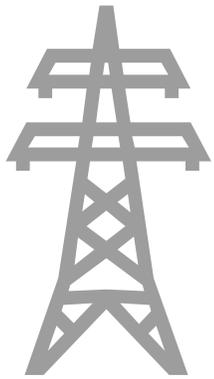
## Other vulnerabilities



# DOMESTIC CUSTOMER PROFILE

Almost all domestic customers use electricity and gas, with a small number also using renewable energy.

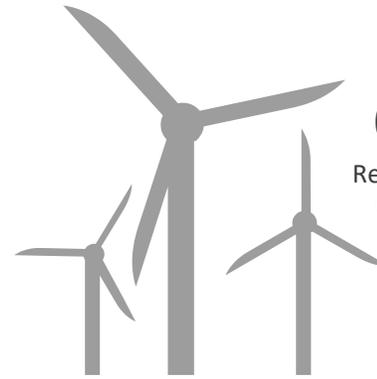
## Fuel usage type



98%  
Mains  
electricity  
supply



100%  
Mains  
gas  
supply



6%  
Renewable  
energy



2%  
Other fuel  
source e.g. oil  
or gas  
canisters

## Location of home



20% Urban

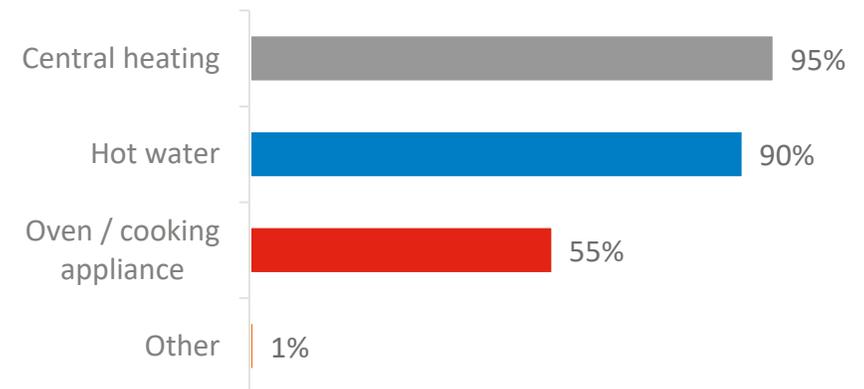


59% Suburban



20% Rural

## Domestic Gas Usage



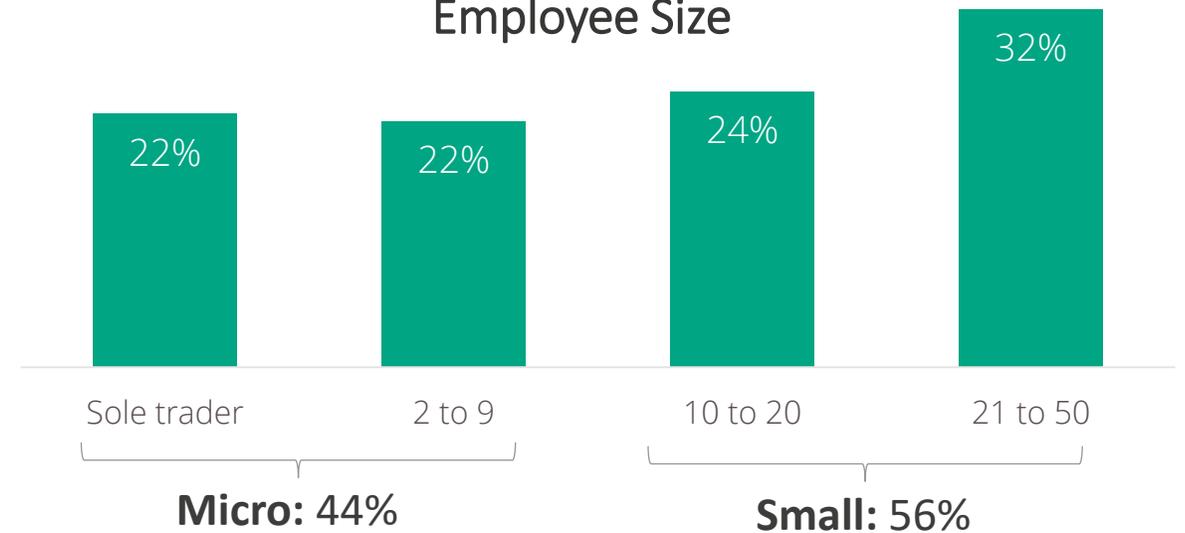
# SME CUSTOMER PROFILE

We interviewed mostly private sector businesses, with a good mix of business sizes.

## Organisation type



## Employee Size



S6: Which of the following best describes the organisation you work for? Base: SMEs (152)

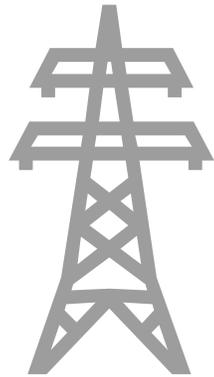
S7: And what business sector best defines the main activity of the organisation you work for? Base: SMEs (152)

S4: How many people work at your organisation? If you have more than one business premises, please include these in your estimation. Base: SMEs (152)

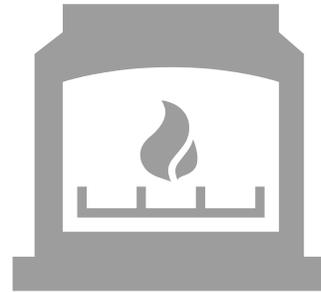
# SME CUSTOMER PROFILE

Most businesses use electricity and gas with one in five also having renewable energy.

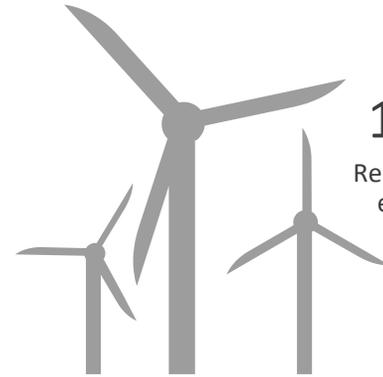
## Fuel usage type



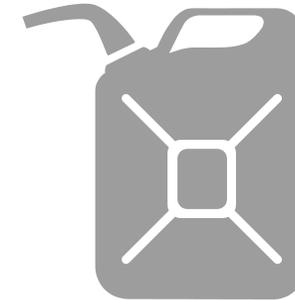
95%  
Mains  
electricity  
supply



100%  
Mains  
gas  
supply



18%  
Renewable  
energy



2%  
Other fuel  
source e.g. oil  
or gas  
canisters

## Location of business

