

# Qualitative Research: Heat Networks

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Report prepared by Kantar Public

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# Executive Summary

## Introduction

The CMA promotes competition and fair markets, within and outside the UK, for the benefit of consumers, and is currently undertaking a market study of the domestic heat networks sector, to investigate whether there is evidence of consumer detriment. As part of their market study, the CMA have undertaken consumer research to explore consumers' awareness, understanding and expectations about heat networks while moving house – specifically experiences of information received – and to understand what role heat networks and the information received about them play in consumer decision making.

## Methodology

Qualitative research was conducted with consumers living on heat networks with responsibility for the choice of property when moving home. Primary sampling criteria included how recently consumers had moved house, tenure (including owner occupier, private renter, local authority, and housing association tenants), and whether the property was a new build. 22 x 60-minute depth interviews were conducted in total, with 21 conducted face to face and 1 conducted by telephone. Researchers used a journey mapping technique to explore respondents' home move journey and their experiences of the information they received about heat networks.

Recruitment was conducted from a BEIS sample containing heat network post codes, sample purchase and data matching, 5118 mail-outs (post and e-mail), and door-knocking by recruiters. Due to a number of recruitment challenges, there are a number of limitations to the findings relating to final sample composition. The research included consumers that had moved more than three years ago, limiting their recall of the exact information received during the home move journey. The sample also did not include an even spread of tenure: only 1 x local authority tenant and 2 x private renters were recruited, meaning findings for these specific tenures are indicative rather than conclusive. Further, 4 respondents had complained to the CMA, meaning their attitudes were more negative, and they were more engaged than other respondents, which may have introduced a bias to the sample

## Home move journey

### *Prior to moving house*

On the whole, respondents had low awareness of heat networks prior to experience with their current property, and the few that had previous awareness had mixed perceptions about heat networks. Some felt they were efficient and environmentally friendly, whilst others associated them with old blocks of flats and being inefficient because they were 'always on.' However, any previous associations had very little impact on decision making during the home move.

### *Searching for a property*

Heating was not top of mind or a high priority when searching for a new property across all tenures. Respondents' priorities included location (for all), as well as budget and features of the property. Very little information about heating was provided at the searching stage, and respondents were not seeking information about heating at this time. In addition to this, across all tenures, respondents described having very limited choice in terms of the properties available to them, citing budget constraints and high demand, as well as long waiting lists for housing association tenants - meaning their decision about a property took very few factors (other than budget, location and size) into account.

### *Viewing a property*

Heat networks were not always mentioned at viewings. If they were mentioned, they were often 'sold' by agents as a 'green' or 'efficient' heating system to owner occupiers and private renters. As a result, respondents perceived the heat network as a positive aspect of the property and did not feel the need to ask for any additional information. For local authority and housing association tenants, if heating was discussed, it came up in relation to services charges – the fact that the heating system was a heat network was rarely mentioned. Respondents also felt pressure to commit to properties at viewings, which limited their engagement with information. Any knowledge about the heat network at this stage had minimal impact on decision making as respondents had higher priorities.

### *Prior to move in*

Owner occupiers received the most printed information about the property prior to the home move, compared to other tenures. However, they were unlikely to engage with any information about the heat network as they were dealing with a great deal of other paperwork at the time relating to the property purchase, and had higher priorities than utilities. Other tenures did not receive as much written information as owner occupiers, though local authority and housing association tenants tended to know what their heating costs would be prior to move in from the tenancy agreement.

### *Moving in*

Moving into a property was a key moment where respondents received and engaged with information about heating, meaning they either realised they were on a heat network, or began to understand that a heat network was different to conventional heating. The key information received at this point was the home user manuals or a welcome pack, though the description of the heat network in these documents tended to be quite technical, meaning respondents' understanding of the heat network may have remained quite shallow. During move in, some respondents (more likely owner occupiers) also learnt who their supplier was, though this was not always the case. It was rare for local authority and housing association tenants to receive home user manuals or welcome packs at move in.

### *Experience since moving*

Engagement with and understanding of heat networks was linked to consumer experiences and satisfaction. Respondents who had positive experiences (primarily LA/HA) had no reason to engage with their heat network or supplier, and so their understanding of their heat network remained limited. Housing association tenants also tended to have little direct contact with their supplier, as this was managed partly or completely housing association.

Those that had negative experiences (primarily owner occupiers in the sample) gradually became more engaged with their heat network and supplier as they dealt with disruptions in service, higher than expected heating costs, inconsistent/infrequent billing, and poor customer service. As respondents encountered issues, they sought additional information from their supplier, property managers, neighbours, and online, which led to fuller understanding of heat networks and the implications for choice, namely that they are unable to switch supplier.

## **Information needs and implications**

Information received during the home move journey did not influence decisions about property because (a) the information received about heat networks was partial and (b) engagement with that information was low. Any information received prior to move in was primarily verbal and non-specific, particularly at viewings. The majority of information was actually received after move in (e.g. welcome packs and home user manuals), or was proactively sought out in the event of service problems. Respondents tended not to engage with the limited information received about heat networks because heating was not a high priority when choosing a property

and there is an underlying assumption that all utilities will operate in the same way (i.e. that consumers are able to switch).

Respondents that had negative experiences felt that they did not receive enough information about the heat network, and that in order to make a truly informed choice, there is key information they should be told prior to making a decision, specifically that: consumers cannot switch supplier; heat networks may mean more frequent disruptions to service which may take longer to fix (compared to conventional heating); and that the market is unregulated, so there is not necessarily a clear escalation process for disputes. Respondents with positive experiences tended to be satisfied with the information they received, but thought there could be better provision of contract and billing information.

Respondents felt that more information should be provided at the viewing stage and prior to move in, particularly that a property is part of a heat network, how this differs to conventional heating, and that you cannot switch supplier. Respondents also wanted information about expected heating costs and tariffs prior to moving in, as well as more consistent and transparent information about billing and disruptions in service after moving in.

In hindsight, participants said their choice of property may have changed, but overall their choices were constrained because of limited consumer choice in the housing sector. Some with negative experiences said they would avoid properties with heat networks in the future, and would caution family and friends against purchasing properties on a heat network. Respondents that had extremely negative experiences, said they would not have made the same choice of property as a result of the issues they experienced.

## **Conclusions**

Providing information about heat networks during the home move process raises a number of contextual challenges, namely consumers' general disengagement with heating (and other utilities) and the fact that heating is a low priority whilst searching for a property and moving house. In order to overcome assumptions that all utilities operate in the same way, information will need to highlight that heat networks differ from conventional heating. The more transparent the information is about the impact on consumer choice (i.e. inability to switch), the more likely it is to capture attention.

There were key information gaps in the home move journey, and respondents wanted more complete information prior to making a decision and moving into a property. This presents an opportunity to provide consumers with standardised, meaningful information they can engage with e.g. heating cost projections. Those with negative experiences felt there was a need for greater transparency about the inability to switch supplier, frequent disruptions, and that heat networks were an unregulated market. After move in, consumers also wanted better information from their supplier and greater transparency about contact details, contracts and billing.

Though consumers may be unable to act on information about heat networks due to constrained choices in the housing market, more complete information may mean they feel they made an informed choice and feel more positively about their situation.

# 1. Introduction

The CMA promotes competition and fair markets, within and outside the UK, for the benefit of consumers. The CMA may trigger a market study if there are indications that a particular market is not working well, to the detriment of consumers. The CMA is undertaking a market study of the domestic heat networks sector<sup>1</sup>, as there may be consumer detriment in this sector, underpinned by the fact that customers are unable to switch supplier and may be locked into very long contracts. Specific concerns include:

- issues with pricing due to lack of competition;
- possible price increases after customers are locked in;
- barriers to entry for other energy suppliers;
- lack of transparency about prices before purchasing/renting a property that uses a heat network;
- lack of transparency in billing during residency;
- poor service and intermittent supply; and
- the fact that heat network customers are not covered by equivalent consumer protections applicable to gas and electricity customers

The key objectives of the research were: to explore consumers' awareness, understanding and expectations about heat networks, specifically experiences of information received; and to understand what role heat networks play in consumer decision making. Within these two broad objectives were a number of other research aims:

- How well are consumers informed about the heat network and running costs before they move in?
- What information is provided to them, and is this sufficient?
- How well is the information understood by consumers, such that they can act on it?
- What part does the heating system play in the consumers' decision to buy or rent a property: how much does it matter to them?
- How important is this alongside other factors the consumer considers?
- To what extent does it affect what consumers are willing to pay for the property?
- Once the consumer has moved in and had experience of the heat network, would they still have made the same decision? Do they feel they should have had more information, or that they should have paid more attention to it?

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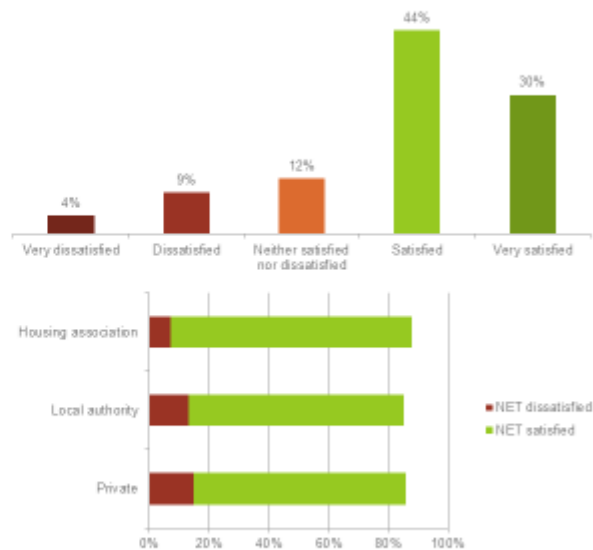
<sup>1</sup> Heat networks market study statement of scope. Competition and Markets Authority. 7 December 2017. <https://assets.publishing.service.gov.uk/media/5a281c21e5274a75088c42d1/statement-of-scope-heat-networks-market-study.pdf>

## Context to the research

### What does the BEIS survey data tell us?

- More than a third of heat network consumers reported experiencing an **interruption/loss of heating** in the last 12 months
- **Experience can differ** greatly for heat networks consumers
- There is evidence of **great variation in pricing** in the heat network sector
- Evidence of **relatively poor transparency** in the heat network sector: less likely to receive any form of bill, account summary or statement
- Less likely to have received **information** about the type of heating system they had
- However – heat network consumers **as satisfied** as non-heat network consumers with the **quality of information** they received about their heating and hot water system

Overall satisfaction with heating and hot water system



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Source: Heat Networks Consumer Survey  
[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/665447/HNCS\\_Results\\_Report\\_-\\_FINAL.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/665447/HNCS_Results_Report_-_FINAL.pdf)  
Department for Business, Energy & Industrial Strategy, December 2017.

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Previous quantitative research<sup>2</sup> about heat networks conducted by Kantar Public on behalf of the Department for Business, Energy and Industrial Strategy, provides the context to this research. Specifically, that there appears to be a fair amount of variation in the sector in terms of experience, billing and service. There is also evidence that transparency and information provision is poor compared to non-heat network consumers.

It is worth noting that overall, consumers tend to be satisfied with their heat network<sup>3</sup> - this research has sampled both satisfied and dissatisfied customers, so it explores respondent views and needs at both ends of the spectrum.

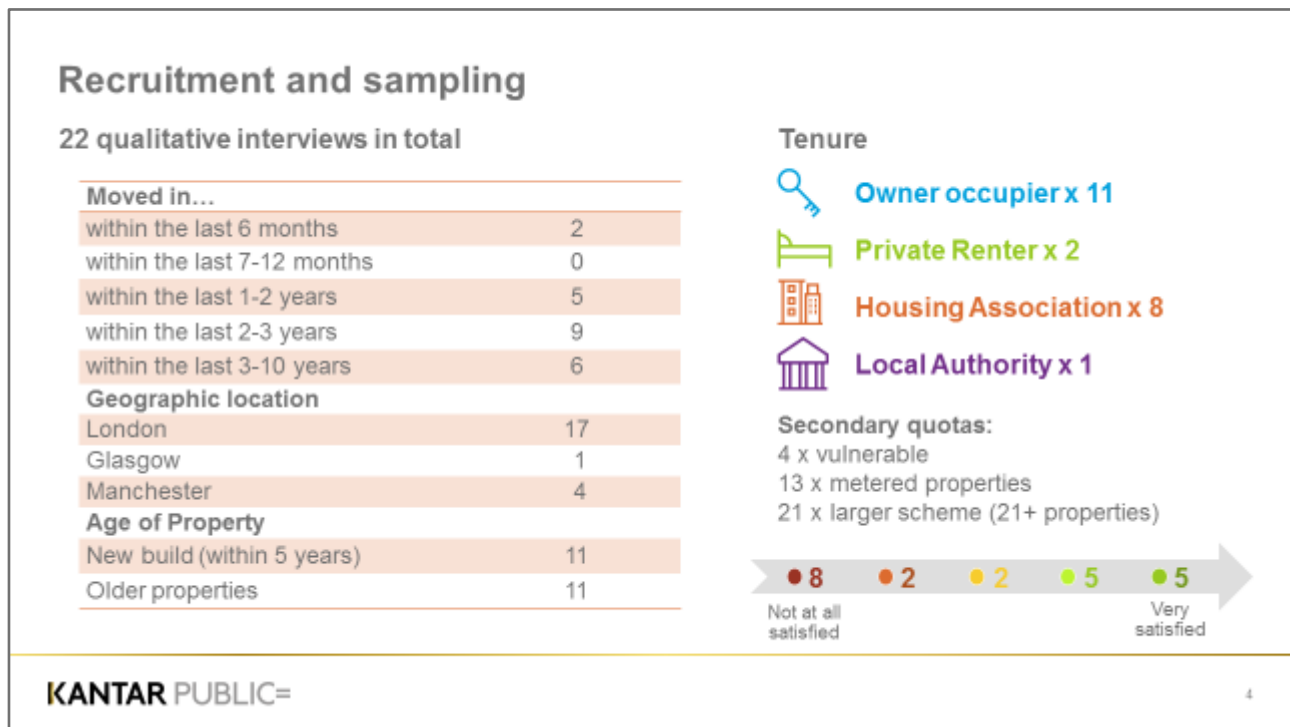
<sup>2</sup> Heat Networks Consumer Survey.

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/665447/HNCS\\_Results\\_Report\\_-\\_FINAL.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/665447/HNCS_Results_Report_-_FINAL.pdf). Department for Business, Energy & Industrial Strategy, December 2017.

<sup>3</sup> Q14. Overall, how satisfied or dissatisfied are you with your heating and hot water system?

# 2. Methodology

## 2.1 Fieldwork & Sampling



All respondents were living on a heat network and had responsibility for making decisions about their home move. Key sampling criteria included how recent their home move was, housing tenure, and age of property. Additional quotas in the sample related to location, metering, and vulnerability. We recruited respondents with a range of satisfaction with their heat network. A limit was set at a maximum of two respondents per heat network. A final achieved sample table can be found in Appendix D.

Qualitative fieldwork was conducted in January and February 2018 in London, Manchester and Glasgow. Out of 22 total depth interviews, 21 were conducted face to face and lasted around 60 minutes. One interview with a respondent in Manchester was conducted by telephone. Respondents were given a £50 incentive as a thank you for taking part in the research.

This research used a journey mapping technique to capture information about respondents' home move journey and the information they received about heat networks. Journey mapping is a technique used to help respondents' recall in interviews, where the researcher creates a map of the respondent's journey, which can be used as a scaffold for respondents' memories and assist in recall. Mapping events systematically and bringing respondents back to a particular point in time helps the researcher to build a fuller, more accurate picture of what was going on throughout the journey.

In addition, other stimulus materials such as examples of EPC certificates, residents' welcome packs and heat supply agreements, were used to prompt respondents' memory. The topic guide is included in Appendix E - and an example journey map in Appendix F.



## 2.2 Recruitment

### Recruitment strategy and challenges

*5,118 opt-in letters: 2,684 by email and 2,434 by post*

- Low incidence of people who have moved recently: 12% people on a heat network moved in the last 12 months
- Potential research fatigue: BEIS postal survey April-July 2017, 3,716 households

1. Heat network sample provided	2. Sample purchase: emails and letters sent	3. Door knocking	4. Sample purchase: recent move (+HN)	5. CMA Complainants sample
<ul style="list-style-type: none"> <li>• Unable to target to particular properties or time since move</li> </ul>	<ul style="list-style-type: none"> <li>• Unable to target heat network or recent move</li> <li>• Less likely to be sample for recent movers (time for data capture)</li> </ul>	<ul style="list-style-type: none"> <li>• Property access: mainly flats</li> <li>• Unable to target recent movers; low incidence</li> <li>• Snowballing</li> </ul>	<ul style="list-style-type: none"> <li>• Data available about recent movers limited</li> <li>• Data quality/accuracy</li> </ul>	<ul style="list-style-type: none"> <li>• 4 recruited in this method</li> <li>• More engaged / introduces skew to satisfaction</li> </ul>

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The key recruitment challenges related to the low incidence of heat network customers, potential research fatigue following the recent survey of heat network customers commissioned by the Department for Business, Energy and Industrial Strategy (BEIS), difficulty targeting homes on heat networks, and property access. In response to slow uptake to recruitment, Kantar Public undertook a number of recruitment activities in addition to mail-outs and door-knocking based on the heat networks database provided by the CMA, including: additional sample purchase, cross-reference with sample purchased based on recency of home move, additional desk research, and recruiting through the CMA complainants sample.

Further details about recruitment strategies can be found in Appendix C – Recruitment Approach.

## 2.3 Research limitations

Due to recruitment challenges, there are a number of limitations to the achieved sample and things to bear in mind when interpreting the results of this study:

- The sample was designed with the intention of interviewing people on heat networks who had recently moved house, meaning respondents would have better recall about the specific information they received during their home move. However, due to recruitment challenges this quota was relaxed to include others who had moved less recently. While respondents that had moved more recently had better recall, overall respondents could remember key points in the information journey i.e. whether they knew about the heat network before making a choice of property, whether this influenced their decision, when/how they found out the property was on a heat network. Respondents were also asked to bring any information they received about the heat network to the interview, which assisted with recall.
- There are a number of caveats to be made about the strength of sub-group analysis possible in this sample, which will be reiterated where applicable. Findings for both local authority tenants and private renters are based on low sample sizes (1 and 2 respectively), so findings about the differences in experience for these groups are illustrative and indicative, rather than robust conclusions. On the other hand, stronger conclusions can be drawn about differences for owner-occupiers, housing association tenants, and for new build properties. For the purposes of reporting,

we have grouped together local authority (LA) and housing association (HA) tenants to describe how experiences differ for those living in social housing.

- The achieved sample is skewed to London (though there is a higher concentration of heat networks in London<sup>4</sup>), so some of the experiences about searching for a property may be specific to London.
- Respondents that had complained to the CMA ('complainants') had particularly negative experiences. Of the 11 owner occupiers in our sample, 4 were complainants, which might be why the experiences of owner occupiers in our sample are more negative than those of other groups of respondents. The complainants are also likely to be more engaged in the sector and more knowledgeable than other heat network customers which might have introduced further bias to the sample.

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<sup>4</sup>"Heat networks are more likely to be situated in larger urban areas, particularly in London. Reflecting this, the regional distribution of heat network consumers in our survey differed markedly from the wider population. Nearly half of heat network respondents (46%) lived in London, compared to just 15% of the wider population in England and Wales." From the Heat Networks Consumer Survey. [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/665447/HNCS\\_Results\\_Report\\_-\\_FINAL.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/665447/HNCS_Results_Report_-_FINAL.pdf). Department for Business, Energy & Industrial Strategy. December 2017.





# 3. Home move journey

### Overview of home move journey

Searching      Viewing property      Prior to move in      Moving in      Experience since moving

- This section will trace the home move journey for respondents, examining:
  - their priorities
  - the information received, and
  - their understanding of heat networks at each stage.

This is broken down by tenure/property age where relevant differences emerge:

 Owner occupier       Private renter       Local Authority (LA) Housing Association (HA)       New build

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In this chapter we provide an overview of the home move journey, in terms of respondents' priorities, the information they received at each stage, and how this affected their understanding of heat networks. Icons indicate where findings differ by sub-group (tenure or age of the property).

## Respondents had limited previous awareness of heat networks prior to moving house



Few used the term heat networks spontaneously, most used 'communal heating' or 'district heating'



The few that had pre-existing awareness had mixed perceptions, either as

- an **efficient and green** system
- associated with **old blocks of flats**, 'always on', **inefficient** (not a deterrent for new builds)
- previous experience in HA but **disengaged with how it works**



Overall, previous awareness and understanding of heat networks was low



Deeper understanding of the heat network **builds over time**, as a result of lived experience and **information received across the home move journey** (especially in cases of negative experiences); however understanding tends to remain fairly surface level for those with positive experiences.

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Prior to moving into a home on a heat network, on the whole respondents had not heard of heat networks before. Those who did have some previous awareness had generally encountered them through their work (e.g. environmental/surveying), and had different perceptions about heat networks. Some perceived them as a green and efficient heating system, while others associated heat networks with older blocks of flats, seeing them as inefficient because they were 'always on'. Not everyone that worked in the housing sector had heard of them however, as one respondent who worked for a homelessness charity had not heard of heat networks before moving into her current property. One housing association tenant had lived in a property with a heat network previously, but had little understanding of it and no strong views about it.

*"I knew what District Heating was. I thought district heating, centralised heating, was a good thing."*  
(Owner Occupier, London)

*"You see it in old mansion blocks, 1920s ones, where they are generally very inefficient because you pay a fortune in heating and it's on all the time."* (Owner Occupier, London)

Starting from a position of relative ignorance, respondents were not primed to react to information about heat networks in any particular way. Even those who had some pre-existing understanding of heat networks said that this had very little influence on their home move journey or decisions about where to live.

## Heating was low salience compared to other priorities during property search, where consumer choice is already constrained



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In the context of searching for a new property, respondents' priorities tended to be the location (for all), budget and other property features (for the private sector). Heating was not top of mind or a priority for respondents, and was assumed to be a basic 'hygiene factor'. Very little information was provided about heating at the searching stage, and respondents were not noticing or seeking out information about heating.

*"We didn't even think about heating. You just think it is in every property."* (Housing Association, London)

Respondents had higher priorities than heating during the search for a new property. Finding a property within their budget was the main driver of searching behaviour for owner occupiers, particularly those looking for a property in London. The priority for local authority and housing association tenants was primarily the location of the property.

*"We discovered very quickly that with those criteria we would be living in an ex council flat on our budget in that area."* (Owner Occupier, London)

Owner occupiers and private renters tended to search online for properties that fit their criteria (budget, location) and would contact estate agents directly about properties. Local authority and housing association tenants typically applied for housing and were often placed on a waiting list before being offered housing. If their council offered choice-based lettings, tenants would search online and bid on specific properties.

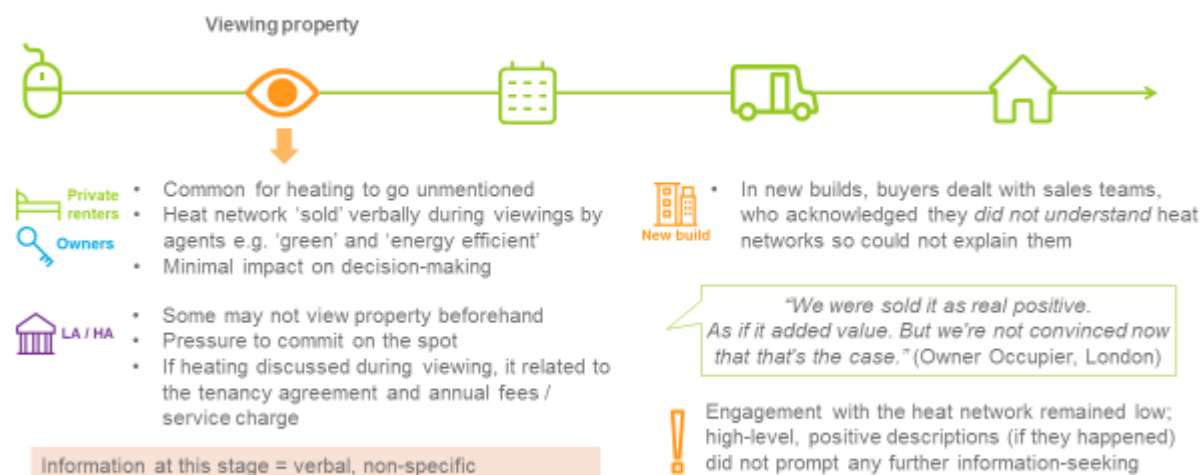
*"Once you registered you got regular updates, you got to watch your bid go up or down once people viewed the property and declined it."* (Housing Association, Manchester)

Choice of property was limited for all, especially as most of these respondents were located in London where the housing market particularly limits choice. Owner occupiers were limited by budget constraints, and the number of properties to choose from was even more limited for those that were searching through Help to Buy schemes. Private renters and local authority tenants had to contend with high demand for rental properties<sup>5</sup>. Housing association properties were also in high demand, with long waiting lists, which meant tenants had even more restricted choice.

*"They're so short of properties you don't get a choice."* (Local Authority, London)

<sup>5</sup> Due to the small sample size the finding should be treated as indicative only

## Communal heating may be mentioned during property viewings; described as a 'green feature' or in relation to service charges



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Heating was not always discussed during property viewings. If mentioned, heat networks were most often described as a 'green' or 'energy efficient' system, or less commonly, in terms of the property having 'one big boiler' or 'communal boiler'. Engagement with this information was low and it had minimal (if any) impact on decision-making. This was in part because respondents did not properly grasp that the heating was that different to conventional heating and the fact that it was framed as a benefit of the property. A further reason may lie in the fact that respondents tended to feel under pressure at viewings to commit to a property, due to a competitive housing market, limiting engagement with information before making a decision.

*"I didn't think much. Didn't know anyone that had it, didn't know nothing. It was not an issue. We didn't know how it was going to work."* (Owner Occupier, London)

*"They told me it was a communal boiler system and we pay weekly and then [the housing provider] pay the bill at the end of year when they get it. I didn't really think about it, just wrote it off."* (Housing Association, Manchester)

### Owner Occupiers and Private Renters

Particularly for owner occupiers and private renters, if heating did come up during a viewing, it was usually as part of a 'sales pitch'. Respondents were typically told the property had a 'green' heating system but not necessarily that the property was part of a heat network.

*"We were sold it as real positive. As if it added value. But we're not convinced now that that's the case."* (Owner Occupier, London)

The discussion was typically high-level and focussed on characteristics of the heat network, rather than the specifics of the heating system or how it worked. That the property was 'green' and 'energy efficient' was seen a 'nice to have' but did not generally influence respondents' choice of property as they had higher priorities.

*"Heating never came up. When you walked into the utility room, they just said 'This is where all your utilities stuff are plumbed in'. And there's a thing that looks like a boiler on the wall and there's a meter. We didn't know to ask about [heat networks], because we didn't even know they existed. It*

*very much looks like a boiler and the stuff you normally see. I'm not a heating expert. That's the only information they volunteered.*" (Owner Occupier, London)

In the rare cases where respondents did seek out more information, often estate agents or new build sales people were unable to answer questions and admitted they did not know much about heat networks.

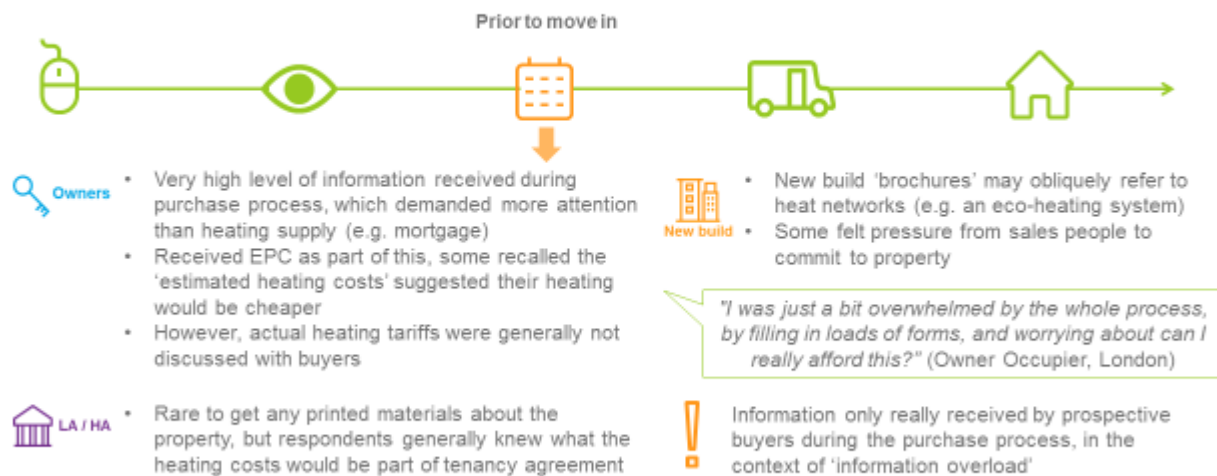
*"I was interested and wanted to know more, but in fact, the sales people knew very little."* (Owner Occupier, London)

### **Local authority and housing association**

Not all local authority and housing association tenants viewed the property before making a decision to take it. If they discussed heating at the viewing, it often came up in relation to service charges or fees for utilities as part of tenancy agreement, so they may not necessarily have been aware that the property was part of a heat network.

*"The heating was sold as being part of the annual fee."* (Housing Association, London)

## Owner occupiers receive most information prior to move in, but engagement with heat network was limited



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After viewing a property, respondents were typically making decisions and committing to a property. Private renters and social tenants signed tenancy agreements once they chose a property, whilst owner occupiers were preparing to exchange contracts. Owner occupiers received the most information about heating prior to moving in (compared to other tenures), but tended to experience 'information overload' due to the amount of overall information received and paperwork involved in purchasing a property.

*"I was just a bit overwhelmed by the whole process, by filling in loads of forms, and worrying about can I really afford this?" (Owner Occupier, London)*

If they received information about their heat network prior to moving in, they tended to pay minimal attention to it, being more preoccupied with other significant issues such as securing a mortgage.

*"We weren't paying much attention. We did know during the course of making an offer that it was on a communal heating system, but we didn't know much about it to be honest." (London, Owner Occupier).*

Owner occupiers generally recalled receiving an EPC along with other paperwork prior to move in. One respondent said that they took notice of the 'expected heating costs' on the EPC, which suggested heating costs might be cheaper. However, generally heating costs and tariffs were not discussed with estate agents or sales people prior to moving in.

During this time, owner occupiers were still experiencing pressure from estate agents and sales people to commit to properties and get through the exchange process quickly, which limited their ability to engage with information.

*"We were very, very rushed. From the moment we'd reserved, they wanted us to exchange contracts within 28 days." (Owner Occupier, London)*

Private renters and local authority and housing association tenants did not experience the same 'information overload' as owner occupiers, as they did not receive as much information as owner occupiers before moving in. Whilst local authority and housing association tenants typically knew the heating costs prior to

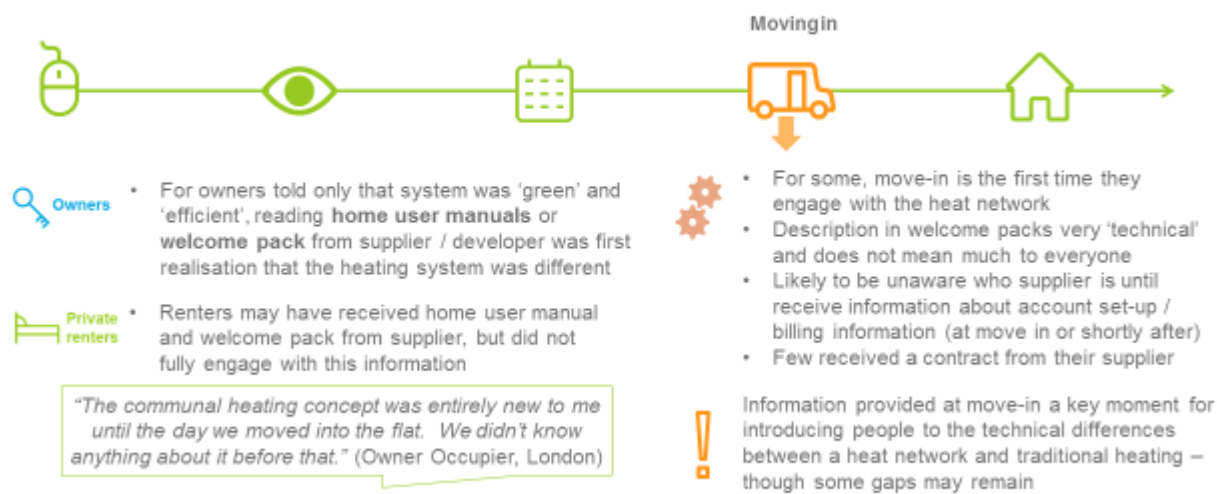


move in because they were specified in the tenancy agreement, private renters<sup>6</sup> were not aware of expected heating costs.

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<sup>6</sup> Due to the small sample size the finding should be treated as indicative only

## On move in, awareness about the differences between heat networks and traditional heating supply begins to build



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Moving into a property was a key moment where respondents engaged with their utilities and started to understand that there is a difference between a heat network and a conventional heating system after they received and engaged with additional information. Though respondents' understanding of the heat network increases at move-in, engagement with the heat network may be relatively shallow at this point (as descriptions are quite technical), so there may still be gaps in understanding about the full implications of living on a heat network.

### Owner occupiers and private renters

For owner occupiers that were told only that their heating is green or efficient, move in was often the point at which they realised that they were on a heat network.

*"The communal heating concept was entirely new to me until the day we moved into the flat. We didn't know anything about it before that." (Owner Occupier, London)*

Generally, this realisation came after reading home user manuals or a welcome pack from their supplier, which might include a description of their heating system. Often these descriptions were quite technical, so whilst it indicated that the heating system was different to conventional heating, understanding of the heat network and how it worked remained shallow.

Most owner occupiers and private renters were not aware of who their supplier was until move in or shortly after when they received information about setting up an account. Few had received a contract from their supplier or were asked to sign a contract at any point. A couple of owner occupiers that later asked for a copy of their contract from their supplier were given unsigned contracts.

*"I have never had a contract and that is one issue. [My supplier] claims that I did. They sent a contract without any signature from me, claiming that is the contract." (Owner Occupier, London).*

Private renters<sup>7</sup> were much less engaged than owner occupiers, and did not read home user manuals, even if they did receive them. Both private renters were unaware even at the point of research that their property was part of a heat network.

### **Local authority and housing association tenants**

Local authority and housing association tenants tended not to receive much information about their heat network at move in. Most commonly they received information about heating costs as detailed in the tenancy agreement, but a couple of respondents received written information about the heat network. One housing association tenant recalled receiving the EPC efficiency rating with her tenancy agreement. Another housing association tenant received a home user manual, which included a description of the heat network, though like owner occupiers and private renters, she found the description confusing and overly technical.

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<sup>7</sup> Due to the small sample size the finding should be treated as indicative only

## Owners interviewed had more negative experiences, increasing engagement and information-seeking about heat network / supplier



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Understanding of heat networks related to consumer experience and satisfaction. Those who had negative experiences became more engaged with their heat network and supplier as a result of these experiences, and they were motivated to seek out further information. On the other hand, those with positive experiences had had little reason to (attempt to) engage with suppliers, and tended to have lower engagement with and understanding of their heat network.

### Positive Experiences

Overall, local authority<sup>8</sup> and housing association tenants in our sample had more positive experiences. They tended to have fewer experiences of disruptions to their heating, and because the local authority and housing association were the main point of contact, tenants generally were not dealing directly with the supplier regarding billing or maintenance.

*“In one sense it is better because you don’t have the headache of another bill and because the service charge covers breakdown costs, what you use and maintenance, I don’t have to have insurance on it.”* (Housing Association, London)

However, this occasionally led to confusion over who to contact (supplier or LA/HA) if respondents experienced issues with their heating or with their pre-pay meter.

Local authority and housing association tenants also tended to pay a flat rate weekly or monthly for heating (which had usually been discussed), so there were not any unexpected heating costs to deal with.

*“Towards this communal heating I pay £12.35 a week, which is nothing out of £168 a week state pension.”* (Housing Association, London).

It’s possible greater positivity among local authority and housing association tenants may be linked to the fact that they do not directly manage their heating and it is either partly or totally managed by the local authority or housing association.

<sup>8</sup> Note that there was only one local authority tenant in our sample.

## Negative Experiences

Although some private renters and local authority and housing association tenants encountered issues with their heat network, those that reported overall negative experiences with their heat networks tended to be owner occupiers (this could be due to the fact that the four complainants recruited were owner occupiers).

Issues that respondents encountered can be grouped into broad categories: disruptions in service, issues with heating costs/billing, and customer service. The experiences of heat networks were often considered to be very different to experiences of conventional heating in terms of the time taken to remedy problems, and that the information provision standard to conventional heating was not a given, with some specific gaps in information provided about heating tariffs and costs, and information about the supplier.

### Disruptions in service

Nearly all owners in our sample had experienced disruptions in their heating supply, with some experiencing recurring disruptions or disruptions that lasted for several days. Respondents felt these disruptions were not resolved in a timely manner, and that the supplier lacked transparency about what was being done to resolve issues.

*“So many problems, initially a problem with the pressure in the heating system, so radiators not working properly, the pipes obstructing the HI unit, some valves were not working to switch on radiator, filling loops, cylinder had to be replaced in December over £1300, and now there is an issue with the pump.” (Owner Occupier, London)*

### Heating costs/ billing

Overall heating costs were generally higher than respondents expected they should be. For example, a respondent who moved from a semi-detached house to a flat said she was paying more to heat her flat. Some felt that the rates were not competitive, specifically that the standing charge for heating was very high.

*“One of the plans has the standing charge at £1 per day, so £30 per month just for the standing charge. And then the heating can cost up to 8p per kilowatt-hour, which is quite high.” (Owner Occupier, London)*

Respondents reported receiving bills at irregular intervals, often with large gaps in between, resulting in some very high bills. Others hadn't received billing statements and weren't able to access their past statements, which meant they were unable to query heating costs with their supplier.

*“[My supplier's] online billing system is so poor. It will show you how much you've paid in, but not how much you've used. Is £30 sufficient? Money is tight, am I going to be landed with a massive bill? It's quite frightening because you really don't know. It's not been a nice experience.” (Owner Occupier, London)*

*“I've had no bills online, even though I'm signed up to online billing. Since April 2017 I have not been able to view my bills online. I've been paying the bills based on the total amount without knowing what the surcharge is, what the heating part of the tariff cost is.” (Owner Occupier, London)*

One private renter experienced great difficulties topping up their pre-pay meter and felt the amount of money they were paying for heating was high.

### Customer Service

After encountering issues, respondents had contacted their suppliers, and often found the customer service to be particularly poor. Respondents described the sometimes confrontational nature of interactions,

inconsistency of information provided to consumers on the same network, and difficulty finding the right person.

*“(I’m) not very happy with the heat network. Essentially it works, but trying to deal with them is difficult which means the service we’ve had is particularly poor.”* (Owner Occupier, London)

*“I phoned up [my supplier] and spoke to about 3 different people, and they each gave me different information. I had to speak to one of my neighbours who told me the times of when the heating came on.”* (Owner Occupier, Manchester)

## 'Fuller' understanding of heating supplier and implications of this on service and choice came only after encountering issues/outages



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As respondents encountered issues, they sought more information from their supplier, and where they felt this information was not sufficient or the customer service was poor, they sought additional information. Respondents commonly contacted property management companies for information about disruptions, maintenance, and billing, and wanted their support in addressing ongoing issues with the service and supplier. Those who had negative experiences frequently discussed issues and shared information about their heating with their neighbours; many created social media groups for their neighbours as a result of ongoing issues with their heating. Many also searched online for information about heat networks and their supplier.

*"It wasn't until we got the bill through, and spoke with someone, and Googled 'communal heating system' that we realised, actually, we have absolutely no choice: 'This is the supplier you go with, this is the price that you get'. I remember at the time feeling very annoyed, because all control and choice had been taken away from us".* (Owner Occupier, London)

*"I got more information off the internet than I did from [my supplier]."* (Owner Occupier, Manchester)

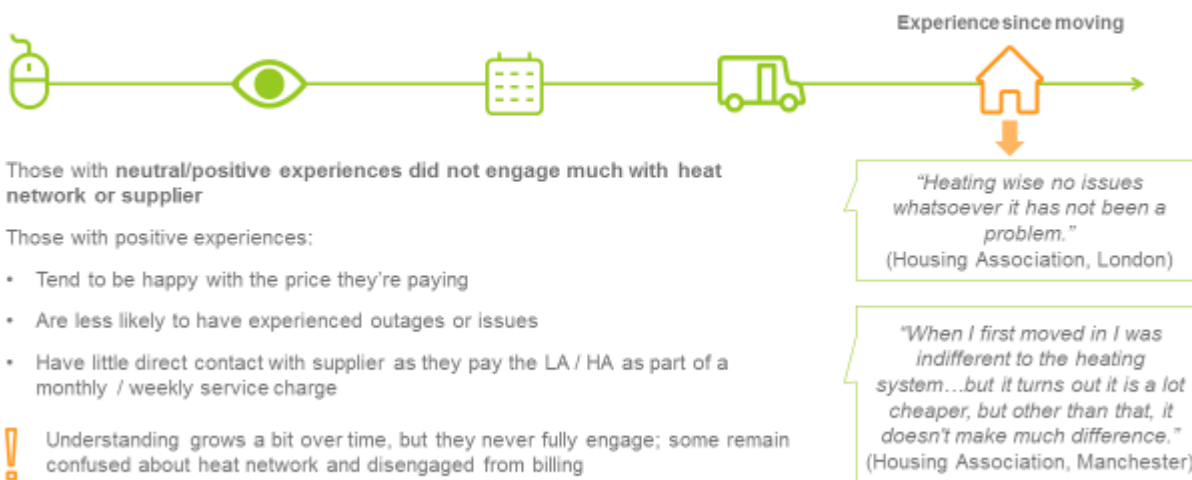
As a result of this engagement and the information received, respondents realised that a heat network was different to conventional heating and that this had implications for their choice. Specifically, even if they were unhappy with the heating supply, billing, heating costs, or customer service they cannot switch supplier and there was no place to escalate disputes with their supplier.

*"Because where I'd moved from before I've always had a choice of heating. I've never lived in a property where you do not have a choice."* (Owner Occupier, London)

*"Heating is important, but it never passed through my head that we would have issues."* (Owner Occupier, London)

*"I want value for money and I can't get a cheaper rate anywhere. It's a bit bad that you can only be with [one supplier] and you can't shop around."* (Owner Occupier, Manchester)

## Those with mostly positive experiences were less engaged with heat network and don't generally reach a fuller understanding



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Respondents that had positive experiences – primarily housing association tenants in our sample – did not engage as fully as those with negative experiences. Their understanding of heat networks remained 'shallow' in that they were unlikely to be aware that they cannot switch supplier, or even know who their supplier is.

*"I know as much as is in this manual, which is not much at all."* (Housing Association, London)

*"Not much to tell the truth, I don't even know who is my heating supplier."* (Private Renter, London)

*"I know that it is communal, that it is electric only and that's all I know really."* (Housing Association, London)

*"I've not actually questioned communal heating."* (Housing Association, London).

Respondents with positive experiences reported fewer disruptions to their service, and did not have to deal directly with their supplier for billing or maintenance.

*"Heating wise no issues whatsoever it has not been a problem."* (Housing Association, London)

These respondents also tended to be happy with the price they were paying.

*"When I first moved in I was indifferent to the heating system...but it turns out it is a lot cheaper, but other than that, it doesn't make much difference."* (Housing Association, Manchester)

As a result, those with positive experiences generally were not interacting with their supplier's customer service, where much of the dissatisfaction appears to stem from.

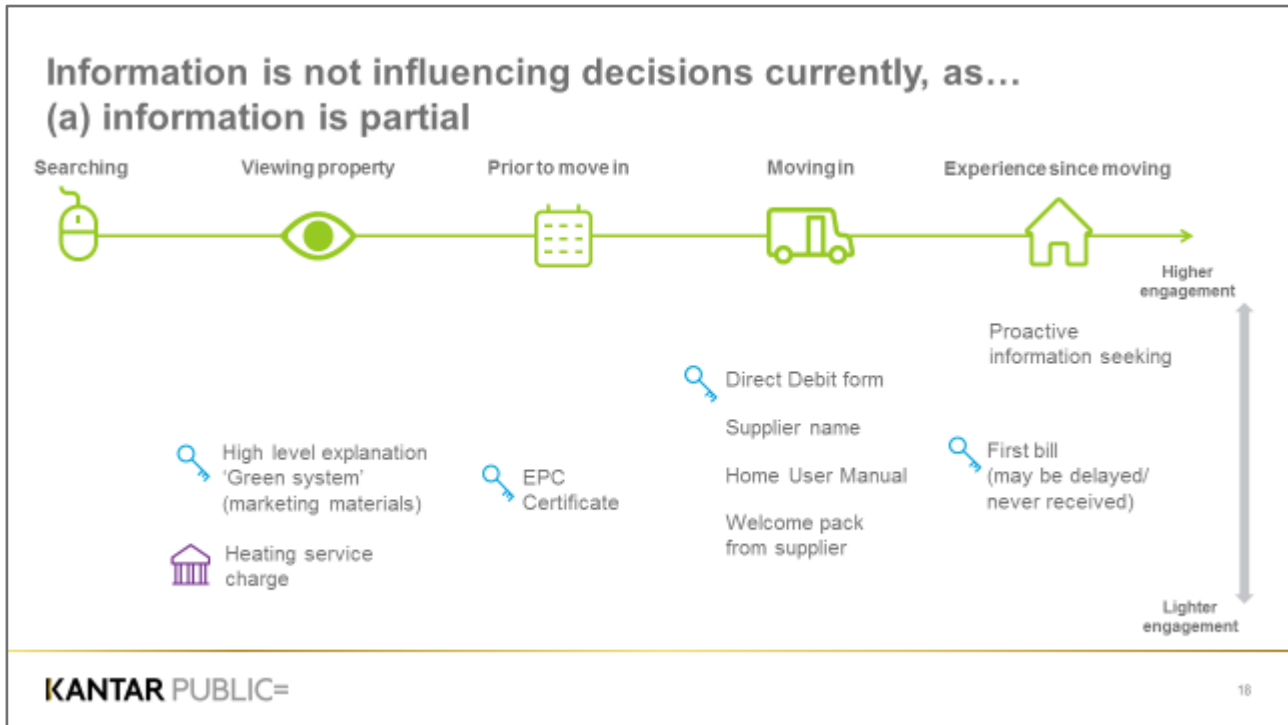
*"I'd never lived in communal accommodation before. I thought it was lovely, they sort out all the maintenance and you don't have to worry."* (Housing Association, Manchester)

Some respondents described the positives of living with a heat network that functioned well, in particular their appreciation for consistent warmth, and in one instance the positive effect this had on their family member's health condition.



*“Our property is very warm all of the time because we have communal heating and that's really helped my dad's health, so it's something we'll consider in our next move.”* (Housing Association, London)

## 4. Information needs and implications



The information received about heat networks during their home move journey did not affect respondents' decisions because the information received was very limited, and the majority of information was received after move in.

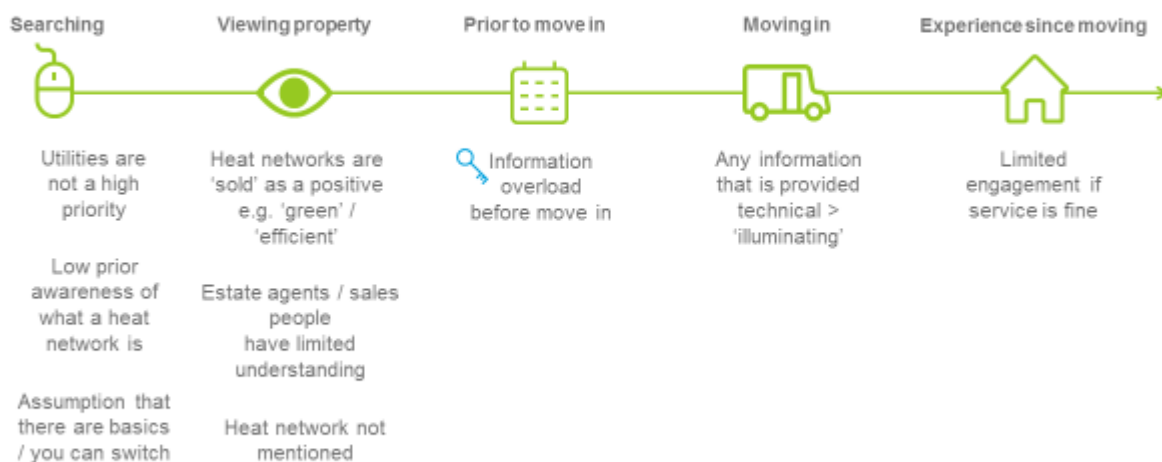
*"I did not have all the information. I will never buy any property associated with district heat scheme that is categorical."* (Owner Occupier, London)

It was common for respondents not to receive any written information about the property until move in<sup>9</sup>, with the exception of owner occupiers who may have received EPC certificates.

Respondents received more information as they progressed through the home move journey, and their engagement with their heat network grew as they received further information.

<sup>9</sup> Though some respondents moved more than a year ago, it is unlikely that there was an additional stage of information provision that they had forgotten. Those who had moved more than a year ago often could recall viewings, mentions of heat networks by estate agents, and could recall when they first became aware that their property was on a heat network.

## Information is not influencing decisions currently, as... (b) engagement with information is low



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A further reason that information had a limited impact on decisions was that respondents did not really engage with it. One of the key reasons for this was that utilities were not considered important in the context of a competitive housing market, where choice was already often severely constrained. Further, respondents tended to assume that heating will meet a basic standard and will operate as other energy utilities do (for example, with similar reliability, consumer protection and ability to switch), so were even less likely to pay attention to the minimal information received.

*"It didn't bother me. It just sounded strange, I hadn't come across it before."* (Housing Association, Manchester)

*"I just kind of made an assumption it would just be as easy as anywhere else I'd lived. Like when I phone up British Gas and they say 'Okay, we'll send a bill'. But it wasn't."* (Owner Occupier, London)

*"I didn't think much. Didn't know anyone that had it, didn't know nothing. It was not an issue. We didn't know how it was going to work."* (Owner Occupier, London)

At viewings, heat networks were either not mentioned, or were 'sold' as a positive or simply as a 'green', 'efficient' heating system by estate agents or sales people, so respondents were not prompted to seek additional information. When respondents did have questions, estate agents and sales people did not know enough about heat networks to explain them in any detail.

As discussed, very little information about heat networks was provided prior to move in for anyone other than owner occupiers, who received an Energy Performance Certificate (EPC). However, given the amount of documentation they were dealing with during their house purchase, and the relative significance of this, their engagement with the EPC and any other information about heating was limited.

Where respondents received information like welcome packs from their supplier or home user manuals after move in, the technical descriptions of the heat network were a barrier to full understanding of their heat network. If respondents had a positive experience with their heating, their engagement with their heat network had no reason to progress beyond this technical understanding.

Some felt they should have asked more questions at the time, but others felt that it was unlikely they would have been given accurate information about the costs (where these were very high) or the reality of service interruptions.

*“They gave us a lot of information about how it works. They had a good plan in place, I guess, but the heating is not working as planned. It’s constantly giving us problems.” (Owner Occupier, London)*

## Participants that had negative experiences felt information received about heat network did not fully communicate risks

- **No choice** – you cannot switch supplier for a better deal
- Compared to conventional suppliers, it may take longer for outages/issues to be resolved
- **Poor customer service** - it may be difficult and time consuming to get information from supplier especially when there are disruptions to service
- **Unregulated market** – so there is no one to escalate complaints to
- May be a very **small supplier**, or relatively new to market/ inexperienced (not known)

*"There wasn't really any way of me anticipating this was how terrible the service from [my supplier] was going to be." (Owner Occupier, London)*

*"The fact they have to have a monopoly to charge you that amount of money says a lot about it. If you have fair pricing, you can switch provider. It's not for consumers." (Owner Occupier, London)*



For consumers to be 'fully' informed, they need to understand broadly how a heat network works and the impacts of this market on their consumer choice – though this is only mainly important to those with negative experiences

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Respondents that had negative experiences felt that the information they received did not give a complete picture of what it meant to be on a heat network and the implications of this on customer service and repairs, the cost of heating, billing, and choice of supplier. As a result, these respondents felt that consumers ought to be told more about what they regarded to be the full implications of heat networks prior to move in, specifically that: there is no choice of supplier - consumers cannot switch to get a better deal, and are compelled to pay what their supplier charges; that consumers on heat networks may experience disruptions to service that take longer to repair compared to conventional heating; and that the market is unregulated, meaning it is unclear who to complain to.

*"I'm being ripped off. This feels like a monopoly because I'm being forced to go with a provider I didn't pick. I have no option but to go with this provider." (Owner Occupier, London)*

*"I wouldn't recommend anyone to use communal heating, it's as simple as that. It's not designed keeping the consumer in mind. They charge you an insane amount of money." (Owner Occupier, London)*

*"The main things for me are there's no choice. It feels like there's absolutely no control over the price they charge, and because they're not regulated I don't know who you're meant to complain to or what you're meant to do. You're very much in the dark, on a constant basis." (Owner Occupier, London)*

## These participants in particular feel key information about heat networks is needed to make an informed decision on a property



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Respondents across the sample pointed to information gaps along their knowledge journey, and described their ideal information journey, in terms of what they thought they should receive, and when. Respondents with positive experiences did not express as great a desire for additional information as respondents that had negative experiences, who felt more information about the heat network and the 'full' implications of this was needed earlier to make an informed choice.

At the viewing stage, respondents felt they should be told that the property has communal or district heating and that this is different to traditional heating beyond just being more efficient (e.g. that the system might experience more frequent disruptions). They also felt it was important to know at this stage that you cannot switch supplier.

Prior to move in, respondents felt they should be given an idea of the expected costs, as well as the name of the supplier, so they could look into the supplier if they wanted to.

*"I should have been told what district heat scheme is, tariffs....knowing that you don't have a choice of provider that would be useful to know, knowing that it is not regulated by a central body, Ofgem."*  
(Owner Occupier, London)

At move in, those that received welcome packs from their supplier and home user manuals that provided a description of their heat network were happy to receive further information, however, sometimes the descriptions were quite technical and not all respondents received welcome packs or manuals. Respondents felt they should receive a contract from their supplier, as well as information about tariffs and supplier contact details at move in.

Once living in the property, respondents also wanted to be billed consistently (where they were being billed irregularly), and they wanted to be issued regular statements with information about tariffs and usage and to have access to past statements, so they were empowered with this information should they wish to query what they were being charged.

*"I'm supposed to get a heat summary every year, and the first one I got was in the summer 2017 and that was after many issues that I have had. [The heat summary] says this is the tariff you are on, this is what you should be paying, this what the service charge is in that tariff, and this is the heating. Unfortunately, from 2014 I did not receive any of those."* (Owner Occupier, London).

After experiencing difficulties with the heat network, respondents wanted greater transparency from the supplier about what the issue was and what was being done to address it.

*“You never think there's going to be such problems. You know, it is a brand new place. It's not hell, but the way they are doing business, it's not transparent. We are not being communicated with. They are supposed to tell me things.”* (Owner Occupier, London)

Finally, where respondents felt they were not being dealt with fairly, they wanted to know what escalation points there were for complaints or disputes with their supplier.

## In hindsight, participants with negative experiences said choice of property may have changed – though constrained by choice

On the whole, choice of property is **constrained**, effectively meaning respondents would be largely 'unable to act' on information

*"For us, because location was so important, you're kind of stuck, in London. And that's how you end up feeling in a really stuck situation, so it's kind of like 'suck it up'"* (Owner Occupier, London)

However, those with **negative experiences** would be wary of living in another property with a heat network or serviced by their supplier, and would caution family and friends



What does more information mean if there is limited opportunity for consumers to act on it?

**Some complainants** said they would have chosen a different property due to persistent issues with heating supply, billing and customer service

*"Me any my boyfriend are planning on moving in together and I said one condition is that we are having our own boiler! At least then I am make my own decisions. But I will never do this again."* (Owner Occupier, London)

One respondent had known he could not switch before purchase – and felt positive that he had **made an informed choice**, despite having a negative experience

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On the whole respondents said their choice of property or what they offered would not or could not have changed, as a result of what they saw as very limited consumer choice in the housing sector. This was true for some respondents who had had very negative experiences. However, they expected that they might try to avoid heat networks in future.

*"If there was no heating and the hot water was twice as expensive, I think we'd still be here."* (Private Renter, London)

Some complainants<sup>10</sup> felt that in hindsight, given what they had been through, they would not have chosen the same property.

*"During the process of buying I didn't know it was part of District Heat. If I had known that I don't think I would have bought the property."* (Owner Occupier, London)

*"If I had my time again and I knew the situation would have occurred, I don't know if I would have bought, because you are completely bound."* (Owner Occupier, London)

Overall, respondents said their offer on the property would not have changed, however, one complainant said he would have been willing to pay more for a property that was not part of a heat network

*"Given a choice, the same property, more expensive but without the [communal] heating, maybe ten to twenty thousand pounds more expensive, I would go for that property."* (Owner Occupier, London)

Some felt that if they had more information about the supplier, they might have had reservations about the property.

*"If I'd Googled [my supplier] and read the reviews, I would have had reservations [about buying the flat]."* (Owner Occupier, London)

Despite having had negative experiences with his heat network, a respondent who knew he could not switch supplier felt relatively positive as he'd made an informed decision about his property.

<sup>10</sup> Respondents who had complained to the CMA about their heat network



*"I had no option in it, but I found a property in the borough I want to live in. So that's a drawback I have to take. I came to terms with [the heat network] because of the massive upside I saw."* (Owner Occupier, London)

# 5. Conclusions

## Key findings and challenges

### Contextual challenges

- **Low engagement** with heating generally: low priority, a basic, assumed to be the same as other utilities
- Heat networks not mentioned, or being **'sold' as a green benefit** – by agents with low/no understanding
- **Very constrained choice** in home move – especially in London / social housing

### Information journey and decision-making

- **Information received is partial** and some not aware of heat network prior to moving in
- For those aware prior to moving in, **no impact on decision about property or price**
- Understanding of the heat network remains **shallow** unless something goes wrong
- **Core information gaps** in terms of clarity about supplier, who to contact, contracts and billing/tariffs
  - For some – there is **also a need to be transparent** about inability to switch, commonality of service interruption, and time taken to remedy (compared to traditional heating) – and channels for escalation
- Those with negative experiences in particular think **more information** should be provided so a decision can be made with 'eyes open', however in **hindsight, may still have made the same decision**

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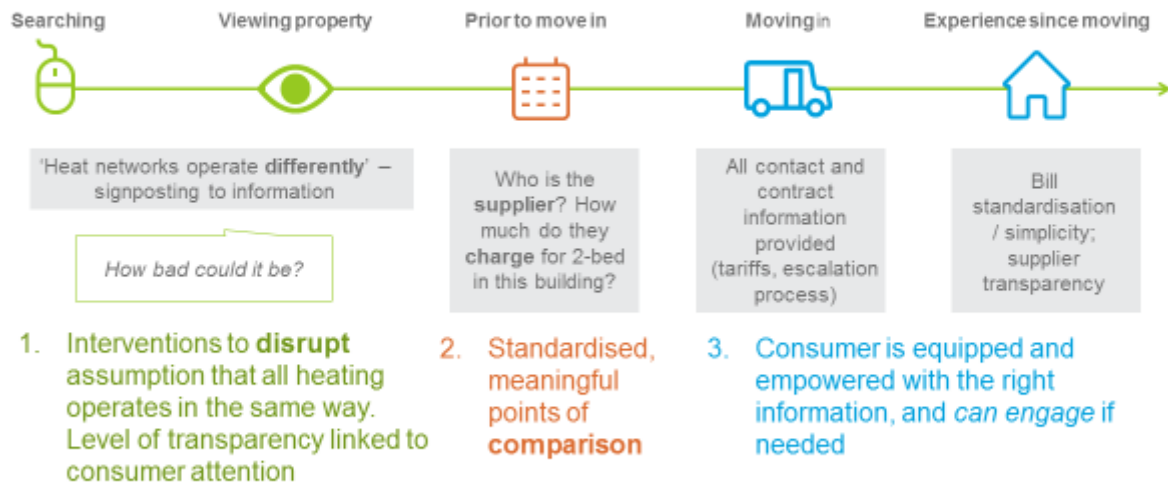
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There are a number of contextual challenges to providing information about heat networks, such that consumers can act on it. This includes general disengagement with heating, and the fact that it is a low priority and low salience issue during home searching and moving. The current housing market in both the private and public sector present a further challenge as consumers may have (or feel they have) limited ability to make choices about property based on anything other than location, budget and key features such as the number of bedrooms. As a result, not all consumers may be able to act on information, but it may mean they feel more informed about their situation.

The research has highlighted key information gaps during the current home move journey, across different tenures. It was not uncommon for respondents to be unaware that they were on a heat network until the point of moving in, either because the heat network had not been discussed, or because they had not engaged with the brief mentions there had been. This meant that for some respondents who had experienced issues with the network later on, there was a perception that information had been inadequate, and that (if described) the heat network had been misrepresented.

Universally respondents wanted better information about the supplier name and contact details, and better billing and tariff information. Notably, this information was less about aiding decision making and more about improving experience of the service after move in, with the exception of knowing the name of the supplier prior to move in. Those with negative experiences, and thus a deeper understanding of heat networks, felt there was also a need to be transparent about the inability to switch and the likely difference in service compared to conventional heating.

## Recommendations and opportunities



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Looking across the home move journey, there are a number of opportunities to engage with consumers differently to increase awareness of heat networks. In order for information to be effective prior to move in, it will need to overcome assumptions made about heating by highlighting that heat networks operate differently than conventional heating. Consumers are more likely to pay attention to information that reveals more about the inability to switch, or service differences.

Prior to move in, there is very little printed information provided - this is a key opportunity to give consumers standardised information that they can make sense of, for example by providing the name of the supplier so consumers could find out more about them, or cost projections based on actual charges for comparable properties on the same heat network.

Once consumers are living with heat networks, they would benefit from improved communications from their supplier and clarity about contact details, contracts and billing and escalation process

# Appendix A – Opt-In Letter

Dear Resident,

I am writing from a research company called Criteria Fieldwork ([www.criteria.co.uk](http://www.criteria.co.uk)). We have been commissioned by an independent research company Kantar Public to arrange a market research study on behalf of the Competition and Markets Authority (CMA) and are looking for people to take part. The CMA promote competition within and outside the UK for the benefit of consumers.

We are speaking to people in your area to gain feedback on household utilities. The aim of the study is to help make the energy sector fairer for consumers.

We are arranging some market research face-to-face interviews on Monday 15<sup>th</sup> January, Tuesday 16<sup>th</sup> January, Thursday 18<sup>th</sup> January, Wednesday 24<sup>th</sup> January and Thursday 25<sup>th</sup> January. The research would last around 1 hour and we would arrange for a researcher from Kantar Public to visit you at your home or a convenient location for you.

As a token of appreciation for your participation, eligible participants would receive £50.00 in cash.

Please rest assured this is not a sales exercise and anything mentioned in the research will not be attributed to you personally.

The research is completely voluntary, anonymous and confidential and we will not share your name or details with your heating supplier. Kantar Public is completely independent from the CMA and your heat supplier.

Criteria Fieldwork is a Company Partner of The Market Research Society. The Market Research Society provides a free-phone number for you to verify our membership if you wish: 0800 975 9596

If you are interested in participating or would like further information about the research we are conducting please contact Tom Sandey on 020 7431 4366 or by email – [tom.sandey@criteria.co.uk](mailto:tom.sandey@criteria.co.uk). We will need to ask some very brief questions to check your eligibility for the research before scheduling your participation.

If you are not interested in participating please accept my apologies for the intrusion and please ignore this flyer.

Kind regards,



Tom Sandey

# Appendix B – Recruitment Screener

<b>Kantar Company</b>	<b>Kantar Public</b>
<b>Name of project</b>	<b>CMA Heat Networks</b>
<b>Sample size</b>	<b>Sample description: 30 depths</b>
<b>Sample description</b>	<b>1 hour in home interview</b>
<b>Quota</b>	<b><u>All respondents must meet the following criteria:</u>  <b>See attached sample table</b></b>
<b>Location</b>	London, Manchester & Edinburgh

Good MORNING / AFTERNOON / EVENING, I am NAME from {{company}}, working on behalf of Kantar Public and the Competition and Markets Authority (CMA).

We are conducting an independent research study about household utilities. We would be grateful if you could allow us to ask some questions. This is a genuine piece of market research; we are not trying to sell you anything and the information will be used for research purposes only.

**Q1.** Which of the following descriptions applies to you?

- 1  Male
- 2  Female
- 3  Other – Specify.....
- 4  Prefer not to answer

**▪ RECRUIT A MIX OF GENDER AT Q1**

**Q2.** How old are you?

*WRITE IN ANSWER*

---

**▪ RECRUIT A MIX OF AGES AT Q2**

**Q3.** Can you tell me your ethnicity?

*WRITE IN ANSWER*

---

**▪ RECRUIT A MIX OF ETHNICITIES AT Q3**

**Q4.** Which of the following best describes your current working status?

- 1  Working full-time (over 30 hours per week)
- 2  Working part-time
- 3  Temporarily unemployed/looking for work
- 4  Retired
- 5  Not working for other reasons (looking after family, ill etc)
- 6  At school/college/university

**▪ RECORD RESPONSE AT Q4**

**Q5a.** Are you, or anyone in your household, currently employed, previously employed, or retired from, any of the following types of companies?

- 1○ Marketing or market research
- 2○ Public relations
- 3○ Advertising
- 4○ Journalism or broadcasting
- 5○ Manufacturing or distribution of any utility providers
- 6○ New product development
- 7○ None of the above

**▪ IF RESPONDENT CODES 1-6 PLEASE CLOSE**

**Q5b.** What is the occupation of the main income earner in your household? That is, the person with the largest income, whether from employment, benefits, investments or any other source.

*RECORD VERBATIM RESPONSE(S)*

---

If required PROBE for: Are they employed / self-employed, What grade/ level their position is, Business type, How many people they are in charge of, Any job specific qualifications they may have etc.

*RECORD SOCIAL CLASS*

- 1○ A
- 2○ B
- 3○ C1
- 4○ C2
- 5○ D
- 6○ E

**▪ RECRUIT A MIX OF SOCIAL GRADES AT Q5c**

**Q6.** Have you ever been interviewed or attended a group discussion for market research purposes?

- 1○ Yes – continue to Q7a
- 2○ No – continue to Q8
- 3○ Don't Know - **CLOSE**

**• CLOSE IF ANSWERS CODE 3**

**Q7a.** How long ago did you attend this group discussion/interview?

- 1○ Less than 6 months ago **CLOSE**
- 2○ 6 months to a year
- 3○ Longer than 1 year ago
- 4○ Don't know / Can't remember **CLOSE**

**• NONE MAY HAVE PARTICIPATED IN THE PAST SIX MONTHS OR ANSWER CODE 4**

**Q7b.** Can you tell me what the previous discussions were about? (Other)

• **NONE MAY MENTION HEAT NETWORKS**

**Q8.** Can you tell me if your home is serviced by a heat network?

EXPLAIN: Most homes have their own boiler or a burner located inside the home to generate heating. For some homes, heating is provided by communal heating. This is where heating is provided by a shared boiler, or another heat source, that is located outside of your home but in the same building. The boiler provides heat to all homes within that building. An example of this is a block of flats with a shared communal boiler in the basement.

Other homes are on district heating systems. This is where heating is provided by a shared boiler or heat source that provides heating and hot water for multiple buildings. This could be multiple houses or multiple blocks of flats. Often, the central heat source has its own small building near these homes, sometimes called an 'energy centre'.

- 10 My home is part of a heat network (communal heating or district heating) **CONTINUE AFTER VERIFYING PROPERTY/DWELLING IS ON A HEAT NETWORK**
- 20 My home has its own gas or oil boiler which provides my heating **CLOSE**
- 30 My home is solely or mostly heated by electric radiators or storage heaters **CLOSE**
- 40 Something else (Record – make sure not heat network) **CLOSE**
- 50 I don't know **CONTINUE AFTER VERIFYING PROPERTY/DWELLING IS ON A HEAT NETWORK**

• **ALL RECRUITED TO LIVE IN A HOME THAT IS SERVICED BY A HEAT NETWORK, RECORD WHETHER THEY THINK THEY ARE OR NOT AT Q8**

**Q9.** Can you tell me which of the following applies to you?

- 10 I moved into my current home less than 6 months ago **CONTINUE**
- 20 I moved into my current home 6 months to a year ago **CONTINUE**
- 30 I moved into my current home 1-2 years ago **SCREEN AND GAIN**  
**CONSENT FOR RECONTACT**
- 40 I moved into my current home 2-5 years ago **CLOSE**
- 50 I moved into my current home 5+ years ago **CLOSE**

*RECRUITER TO ASK - Do you know anyone else in your building or block that has moved in the last year? If yes, recruiter to provide his/her contact details for that person to get in touch if interested in taking part in research.*

• **AT LEAST 10 MOVED HOME LESS THAN 6 MONTHS AGO AT Q9**

**Q10.** Can you tell me roughly how old your property is?

- 10 Less than 5 years old
- 20 Between 5-25 years old



- 3○ Over 25 years old
- 4○ Don't know / Can't remember

- **AT LEAST X8 TO LIVE IN PROPERTY THAT IS LESS THAN 5 YEARS OLD AT Q10**
- **AT LEAST X8 TO LIVE IN PROPERTY THAT IS 5 YEARS+ OLD AT Q10**

**Q11.** Can you tell me which of the following best describes you?

- 1○ I live in a privately rented property
- 2○ I own my home (i.e. owner occupier)
- 3○ I am a housing association tenant
- 4○ I am a council tenant

- **AT LEAST 5 TO LIVE IN PRIVATELY RENTED PROPERTY AT Q11**
- **AT LEAST 5 TO BE OWNER OCCUPIERS AT Q11**
- **AT LEAST 7 TO BE HOUSING ASSOCIATION TENANT AT Q11**
- **AT LEAST 7 TO BE COUNCIL TENANT AT Q11**

**Q12.** Can you tell me if your property currently has a heat meter?

- 1○ Yes
- 2○ No
- 3○ I don't know

- **AT LEAST X8 LIVE IN A PROPERTY WITH A METER AT Q12**
- **AT LEAST X8 DO NOT LIVE IN A PROPERTY WITH A METER AT Q12**

*Note to Recruiter: If they don't know, explain that a heat meter is a device that measures how much heat energy is used in a person's home, and then ask again. If they still don't know, record and continue.*

**Q13.** Are you the main bill payer for your heating supply?

- 1○ Yes **CONTINUE**
- 2○ No **RECRUITER TO ASK TO SPEAK TO THE BILL PAYER**

**Q14.** Can you tell me if you received any information about the fact that your property is heated using a heat network (or communal or district heating) prior to moving into your property?

- 1○ Yes
- 2○ No
- 3○ I don't know/I don't remember

- **RECORD RESPONSE AT Q14 – IF YES, PLEASE ASK RESPONDENT WHETHER THEY CAN BRING THIS INFORMATION TO THE INTERVIEW IF POSSIBLE**

**Q15.** On a scale of 1-5, where 1 is not at all satisfied and 5 is very satisfied, can you tell me how satisfied you have been with the heating at your current property?

\_\_\_\_\_

- **RECORD RESPONSE AT Q15**

**Q16.** Can I ask how many bedrooms your home has?

- 1○ 1 BEDROOM
  - 2○ 2-3 BEDROOMS
  - 3○ 3+ BEDROOMS
- 

**• MONITOR AT Q16**

**Q17.** Can I ask if any members of your household have:

- 1○ Long Term Health Problems
- 2○ Hearing/Visual Impairment
- 3○ Received extra support or assistance\* from their gas/heating supplier

\*Including help in reading or understanding energy bills, relocation of prepayment meters to ensure they can be used safely, or priority support in an energy emergency.

**• IF RESPONDENT ANSWERS YES TO ANY OF THE ABOVE, THEY ARE CLASSED AS VULNERABLE - MONITOR AT Q17**

**DO NOT ASK RESPONDENTS**

**Q18.** Record from list the size of the network:

---

**• A MIX OF PEOPLE THAT LIVE IN A HEAT NETWORK THAT SERVES 1-20 DWELLINGS AND 21+ DWELLINGS AT Q18**

**DO NOT ASK RESPONDENTS**

**Q19.** Record whether scheme is part of Heat Trust:

- 1○ Heat Trust
- 2○ Not Heat Trust

**• MONITOR AT Q19**

**DO NOT ASK RESPONDENTS**

**Q20.** Record who the scheme is run by?

- 1○ Energy company
- 2○ Housing association
- 3○ Local authority

*Note to recruiter: Check that respondent's answer matches what is in the sample data and make a note if it does not match.*

**• MONITOR AT Q20**

**ASK RESPONDENTS**

**Q21.** If we have any further questions related to this particular survey, would you be willing to be re-contacted by Kantar?

- 1  Yes
- 2  No

• **RESPONDENTS DO NOT HAVE TO AGREE TO BEING RE-CONTACTED**

**Q22.** The research is about understanding consumers’ experiences of heat networks, and ultimately will be used to help make the energy sector fairer for consumers. This research is being conducted on behalf of the CMA (Competition and Markets Authority), who promote competition for the benefit of consumers.

We would like to invite you to speak to one of our researchers (FOR LONDON: and possibly an CMA representative) about your views and experience with your heating. Our researcher will come to see you in person at your address, or another location convenient to you.

*Note to Recruiter: The CMA may choose to sit in on some of the depth interviews where there is permission to do so from the participant. This is only an option for interviews being conducted in LONDON, so you do not need to ask respondents in EDINBURGH or MANCHESTER.*

**RECRUITER, CONFIRM ADDRESS FOR LOCATION OF DEPTH INTERVIEW AND RECORD**

The discussion will last no more than an hour and as a thank you for your time, you will receive a £50 cash debit card.

RECRUITER TO READ OUT: To confirm, the research is completely voluntary (you can stop participating at any time and participation will not affect your relationship with your heat supplier or the CMA. The research is anonymous and confidential and we will not share your name or details with your heating supplier. KANTAR PUBLIC is completely independent from the CMA and your heat supplier.

With your permission, we will be audio recording the discussions. These will be shared only with the KANTAR PUBLIC research team for research purposes.

FOR LONDON: If an CMA representative does sit in on your discussion with the researcher, they will also treat all parts of the discussion as confidential and will not be sharing your personal details with anyone outside of the research team.

For the interview, please bring any information related to heating that you received during your home move.

You do not need to have any prior knowledge to take part in this discussion. We will not be testing people’s knowledge, but simply asking for people’s views and opinions.

Are you still happy to participate in this research?

- 1  Yes - **CONTINUE**
- 2  No - **CLOSE**

• **If No, please record reason.....**

Respondent's Full Name \_\_\_\_\_

Address \_\_\_\_\_

City/ Town \_\_\_\_\_ County \_\_\_\_\_ Post Code: \_\_\_\_\_

Tel. No. (home) \_\_\_\_\_ Tel. No. (work) \_\_\_\_\_  
\_\_\_\_\_

Mobile Phone No.: \_\_\_\_\_ MUST CODE

Interviewer's name \_\_\_\_\_ Interviewer I.D.# \_\_\_\_\_

Interview Date: \_\_\_\_\_ Date and Time of Interview: \_\_\_\_\_

I declare that this interview has been carried out strictly in accordance with your specification and has been conducted within the MRS Code of Conduct.

Interviewer's signature.

Date:

# Appendix C – Recruitment Approach

1. The CMA provided a database<sup>11</sup> that gave addresses and postcodes of heat networks, though did not provide addresses of the properties serviced by the heat network, or any names/contact details of households on a heat network.
2. In order to target individuals living in properties serviced by heat networks, Kantar Public purchased postal and email addresses for the heat network postcodes in the BEIS sample in our working areas of London, Manchester, and Edinburgh. Opt-in letters (see Appendix A) inviting recipients to participate in the research were sent via email. In total 2,684 emails were sent to respondents in London (1,400), Manchester (1,011), and Edinburgh (273).

To maximise opt-in responses, the opt-in letter stated that the research was about household utilities. After receiving opt-in responses, the field team used a recruitment screener (see Appendix B), which included a detailed definition of a heat network, to check that respondents were indeed living in a property on a heat network. To ensure respondents did not mistakenly tell recruiters they were not on a heat network when they were (and vice versa), they were asked to check their supplier information to verify it, and the field team checked respondent's home address to verify (in most instances) that a property was in fact on a heat network via the EPC register.

While this approach generated opt-in responses, the majority of those who responded were either not living in properties serviced by a heat network or had not moved house in the last year (which was originally one of our recruitment criteria). It is possible that individuals that had recently moved were less likely to be represented in the purchased sample, as this list is based on individuals undertaking activity linking them to an address, meaning there is short timeline for them to be captured by this database.

To recruit respondents for the pilot interviews, the CMA provided the names of properties about which they had received complaints, targeting new builds that were more likely to have a higher incidence of individuals that had moved within the last year. Opt-in letters were sent by post to all known addresses at these properties.

3. In order to better target properties on heat networks, the field team identified properties based on heat network postcodes from the BEIS sample for recruiters to target with door knocking. Recruiters had difficulty gaining access to properties, as they were often blocks of flats. New build properties in particular were difficult to access, as security staff/concierges did not allow them into the building. Whilst this strategy was successful in targeting properties on heat networks, recruiters were unable to target individuals that had moved within one year, so many potential respondents were screened out. Recruiters also attempted to recruit using 'snowballing' techniques, asking individuals that were not eligible to take part (due to home move criteria) whether they knew anyone that had recently moved in their block. However this did not generate any successful leads. In total, six full days were spent recruiting door-to-door in London (x2 days), Manchester (x2 days) and Edinburgh (x2 days) without any success recruiting individuals that had moved within a year. As a result, the field team re-strategised to find ways to better target individuals that had recently moved house.

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<sup>11</sup> The database included information from heat network notifications. (Under the Heat Metering and Billing Regulations 2014 heat suppliers are required to notify BEIS if they have an existing heat network and provide information about the network.)

4. In order to better target recent movers, Kantar Public purchased additional sample for individuals that had moved within the last three years, for heat network postcodes from the BEIS sample. As the new sample purchased contained individuals that had moved within the last three years, a decision was made to relax the home move criteria to anyone that had moved within the last three years.

A total of 2,434 opt-in letters were sent via post to individuals in London, Manchester, and all of Scotland. This generated a number of opt-in responses, though the individuals who responded were ineligible to take part in research.

5. Finally, the CMA contacted individuals that had made a complaint about their heat network (referred to as 'complainants' in this report) inviting them to take part in the research. Initially, some complainants that were willing to take part were screened out because they had not moved within three years. When the home move criteria was extended to beyond three years, the field team reached out to further complainants. Four respondents were recruited through this method. This recruitment method may introduce some bias in the sample in the sense that consumers who have complained are likely to be more engaged in the sector and more knowledgeable than others on a heat network (see Section 2.3).

## Appendix D – Achieved Sample

	TARGET [Participants]	ACHIEVED
<b>TOTAL</b>		
<b>30 x F2F depths (2 participants per network)</b>	30	22
<b>PRIMARY QUOTAS</b>		
<b>Home Move</b>		
Moved within the last 6 months	Min 10	2
Moved within the last 7-12 months		0
Moved within the last 1-2 years (between 13-24 months)		5
Moved within the last 2-3 years (between 25-36 months)		9
Moved within the last 3-10 years		6
<b>Location of Heat Networks</b>		
London	14	17
Edinburgh/Scotland	Min 7	1
Manchester	Min 7	4
<b>Tenure</b>		
<b>Private sector</b>	Min 12	
(Private rental)	Min 5	2
(Owner occupier)	Min 5	11
Housing Association tenant	Min 7	8
Local Authority tenant	Min 7	1
<b>Age of Property</b>		
New build properties (built within 5 years)	Min 8	11

Older previously occupied properties	Min 8	11
<b>SECONDARY QUOTAS</b>		
<b>Size of Scheme (Dwellings Served)</b>		
1-20 dwellings	A mix	1
21+ dwellings		21
<b>Metering</b>		
Properties with meters	Min 8	13
Properties with no metering	Min 8	7
Don't know		2
<b>Vulnerable</b>		
<i>Any member of the household with: Long Term Health Problems, Hearing/Visual Impairment, Received extra support or assistance from their gas/heating supplier</i>		
Vulnerable	Min 3	4
<b>MONITORING</b>		
<b>Size of Property</b>		
Small properties (1 bedroom)		12
Large properties (3+ bedrooms)		3
<b>Scheme Management</b>		
Heat networks run by energy companies		16
Heat networks run by housing associations		4
Heat networks run by local authorities		2
<b>Demographic mix</b>		
<b>Gender</b>		
Male	A mix	12
Female	A mix	10
<b>Age</b>		
18-34	Range	9



35-54		9
55+		4
<b>Ethnicity</b>		
BAME	Min 3	4
<b>SEG</b>		
	A mix	X2 A, X5 Bs, X9 C1s, X C2 X2 Es, X1D

# Appendix E – Topic Guide



## Competition and Markets Authority – Heat Networks

### Topic Guide V2

60 mins

#### Research questions

To explore consumers' awareness, understanding and expectations about heat networks, specifically experiences of information received:

- How well are consumers informed about the heat network and running costs before they move in?
- What information is provided to them, and is this sufficient?
- How well is the information understood by consumers, such that they can act on it?

To understand what role heat networks play in consumer decision making:

- What part does the heating system play in the consumers' decision to buy or rent a property: how much does it matter to them?
- How important is this alongside other factors the consumer considers?
- To what extent does it affect what consumers are willing to pay for the property?
- Once the consumer has moved in and had experience of the heat network, would they still have made the same decision? Do they feel they should have had more information, or that they should have paid more attention to it?

#### Key principles for researchers to follow throughout fieldwork

This guide is intended to be used with a variety of individuals with varying characteristics and backgrounds. As such, it does not contain pre-set questions, but rather lists the key themes and sub-themes to be explored with participants in each interview. Words or short phrases are instead used to indicate the study issues, and allows the researcher to determine the formulation of questions and how to follow up. This encourages the researcher to be responsive to the situation and most crucially to use the terms, concepts, language and behaviours used by the participants.

It does not include follow-up questions like 'why', 'when', 'how', etc. as participants' contributions will be fully explored in response to what they tell us in order to understand how and why views and experiences have arisen. The order in which topics are addressed and the amount of time spent on different themes will vary between interviews but the key areas for discussion are the same.

Questioning and probing will be framed to ensure we understand participants' situations as they view them. Researchers will adapt the approach, as much as possible, to suit the needs of each participant. The prompts provided are not exhaustive, but rather indicate the types of content we would expect to be covered – this may vary across participant groups.

There may also be elements of observation of interaction within the interview – researchers will make notes of observations straight after the interview, capturing any key themes related to the research aims and objectives.

## 1. Introduction (5 minutes)

- **Thanks & Introduction:** Introduce yourself and Kantar Public – independent research agency
- **About the client:** research on behalf of the Competition and Markets Authority (CMA), who promote competition and fair markets within and outside the UK for the benefit of consumers
- **Reason for participation:** Explain that they have been asked to participate in this research to help us understand more about people's experiences of heat networks
- **How their info will be used:** Their views and experiences will be looked at together with views of others taking part in interviews. These views will be analysed by theme then a report is written based on those themes. Research is confidential and no one will be identified in the report.
- **Duration:** 60 minutes
- **Reassurances:** No right or wrong answers - we are simply asking for people's views and opinions; voluntary participation; comfort – let me know if you'd like a break at any time
- **Incentive:** £50 as a thank you for taking part, in the form of a Bacs transfer following the interview
- **Audio recording:** ask for permission to record (explain the discussion will be recorded so that we can accurately capture their views, and so researchers can listen back when analysing the data).  
If they consent to audio recording, tell them that the CMA is interested in listening to the audio recordings of interviews. Tell them this is optional and voluntary, and they can decide at the end of the interview. If they are happy for the CMA to be provided with the audio recordings, we will ask them to sign a Media Release Consent form.
- Any questions/concerns?
- **Start recording:** acknowledge consent for being recorded

## 2. Background and context (5 minutes)

**Section aim:** To warm up the participant to the tone/style of the discussion, and to provide context to journey mapping.

- How they spend their time
  - Job
  - Hobbies
- Who they live with
- Overview of their recent home move
  - When they moved
  - Reason for move
  - Whether anyone else involved in choosing new place to live
- Confirm tenure of current property from sample e.g. rent, own, social housing
  - Check tenure at previous property e.g. rent, own, social housing (i.e. whether there has been a change)
  - Explore any other differences between old/new property (e.g. size, location, etc.)
- Briefly explore their awareness and understanding of heat network

- Explore what they know about their heat supply
- Whether they know who supplies their heat
- How they would describe it e.g. heat network, communal, district, something else
- Whether their property has a meter for heating/hot water- if so how used

If queried, explain what a heat network is:

*Most homes have their own boiler or a burner located inside the home to generate heating. For some homes, heating is provided by communal heating. This is where heating is provided by a shared boiler, or another heat source, that is located outside of your home but in the same building. The boiler provides heat to all homes within that building. An example of this is a block of flats with a shared communal boiler in the basement.*

*Other homes are on district heating systems. This is where heating is provided by a shared boiler or heat source that provides heating and hot water for multiple buildings. This could be multiple houses or multiple blocks of flats. Often, the central heat source has its own small building near these homes, sometimes called an 'energy centre'.*

### 3. Customer journey mapping – moving house (30 minutes)

**Section aim:** To explore participant's actions and decision-making processes during their home move and their priorities at the time, before discussing heat networks

RESEARCHER NOTE: Using the journey map

- Discuss the time from the participant's previous property to when they moved house. The journey mapping exercise covers the home move journey, while Section 4 focuses on the period following their home move and their current views and experiences.
- Establish rough timings for each stage and record this on the map.
- Fully explore all the participant can remember happening throughout the process, including people involved, key activities, what was going on in their life at the time, how they felt about developments - and record on the map.
- Throughout, adapt probes to tenure as appropriate

RESEARCHER NOTE: Introducing the journey map

Tell the participant that during the interview you will be creating a journey map together to understand their experience of moving house and their heating supply, starting at the beginning of the process through to the end. The map will be used to establish relative timings of key events and can be added to or amended throughout the discussion.

#### USE STIMULUS

#### HOME MOVE (15 MINUTES)

- Explore experiences of their previous property, using prompts below as necessary:
  - Where they were living
  - What type of property
  - Who they lived with

- How long they had lived there
- Type of heating supply
- Experience of heating supply (e.g. good, bad, neutral)
- Explore reasons for moving house
  - Priorities at the time - i.e. what were they looking for in the new property
  - Of these, which were more or less important, i.e. deal-breakers, willing to compromise, nice-to-haves
- Explore experiences of searching for a new property
  - Steps taken to find a new property
  - Who else was involved – e.g. estate agents (single/multiple), partner/house-mates, etc.
  - Sources of information
  - Length of time spent looking
  - How easy/difficult it was to find what they were looking for
- Explore making a decision
  - If there was a viewing:
    - What they recall from the viewing of their current property
    - What things stood out about the property
    - IF MENTIONED EXPLORE FULLY: Anything they remember about heating (that they saw, heard, asked about)
  - Any information provided about property (from estate agent, solicitors, local authority, housing association)
  - Why they decided on that property
    - Most important factors influencing decision

### **HEAT SUPPLY AND INFORMATION RECEIVED (15 MINUTES)**

RESEARCHER NOTE: Use a different coloured pen to annotate map during discussion about heat supply following discussion about the home move (above)

*NB: If respondent did not receive/doesn't recall receiving any information, or was not aware of being on a heat network until recently (e.g. until being contacted as part of this research), use the following prompts flexibly, exploring what (if anything) they were told about heating supply, what information they received, and how this may have influenced their decisions (if at all) and then proceed to the next section of the guide.*

- Explore finding out new property is part of a heat network
  - When they found out
  - How they found out/from whom
  - If applicable: How the heat network was described to them
    - What that meant to them
  - Initial reactions to heat network
    - Whether aware of heat networks before this
    - If previously aware, explore existing views about heat networks
  - Questions they had
    - Whether questions were answered

- Where/from whom did they get answers

Building on this, explore all experiences of receiving information about the heat network up to the point of moving in.

*NB: For anything mentioned, establish timing (e.g. at viewing, upon moving in), format and satisfaction with any information received.*

- If respondent brought any information they received about the heat network to the interview, explore using prompts below. Following this, explore any other information about the heat network the participant recalls receiving:
  - Type of information received (if any) e.g. verbal, leaflets, pack, e-mail, etc.
    - Whether received an Energy Performance Certificate (EPC) / did they notice it mentioned heat supply
    - Whether received a contract from their heat supplier
  - Where information came from e.g. supplier, property developer, housing association or local authority
  - How much attention they paid to it / how closely read
  - Content of information - what was included (e.g. information on likely costs, who to contact for complaints, etc.)
    - Whether information was understood
    - Whether information received was considered helpful
    - Any information they thought was missing
- Explore whether they actively searched for information about heat networks
  - If so, when
  - Sources of information
  - Assessment of that information
- Overall, whether they felt informed about heat network before moving, and **why**

*IF RESPONDENT WAS AWARE OF THE HEAT NETWORK AT THE POINT OF DECISION MAKING:*

- Explore impact of heat network on feelings about property
  - Whether/to what extent the heat network influenced decisions about the property
    - If so, how
    - If not, why not
  - How important was the heating supply relative to other priorities at the time
  - For tenants/owner occupiers: Whether property being on a heat network affected how much they were willing to pay for the property
    - If so, probe how (e.g. whether it was part of negotiations)

## 4. Experience of heat network (8 minutes)

**Section aim:** To understand participant's experience of the heat network since living at the property and the information received from the supplier following home move

*NB: This section is relevant to the overall customer journey, however it is low priority in terms of the aims of the research, so cover only if there is time and use prompts flexibly.*

*NB: If respondent has not received/does not recall receiving any information about their heat network since moving in, or was not aware until recently they were on a heat network, use the following prompts flexibly, exploring their heat supply, information, and billing more generally.*

- Explore experiences overall with their heat network
  - How they would rate their experience
  - How it compares to previous types of heat supply e.g. in previous property
  - What's good/positive about their heat network
  - What's bad/negative about their heat network - for any, exploring:
    - What the issue was e.g. overheating/under-heating
    - Whether it has been resolved
  - If previously aware of heat network, how experience of heat network compared to expectations
- Explore experiences of information/communication received about heat network following home move
  - Whether received any information after moving house
  - If so, what information was received (type/content)
  - Usefulness of information received
  - Where information came from e.g. supplier, housing association or local authority
- Explore experiences with heat network billing
  - Information received e.g. monthly statements
  - Whether heating costs are higher/lower than expected
  - How heating costs compare to previous property
  - Understanding of how they're being charged
  - Whether easy to get in touch with supplier for queries
    - Any experience of this

## 5. Information needs and reflections (10 minutes)

**Section aim:** To explore participant's reflections on their experience with a heat network and their information needs given their experiences

Explore views in hindsight, i.e. "knowing what you know now about your heat network..."

- Would decision to move to property been different / would they have chosen the same property
  - If so, how - would their offer have changed
  - If not, explore why
- Anything they would do differently
- Whether they wish they'd paid more attention at the time
  - Would this have changed anything
- Information they wish they had to make a decision
  - When information should be received i.e. at what point in home move journey
- Key info they would tell someone moving onto a heat network

- Anything else to say about experience of being on a heat network

## 6. Thanks and close (2 minutes)

**Section aim:** To wind down the interview, capturing any outstanding views/experiences, and bringing the interview to a close.

- Final messages
- Thanks, and reminder of confidentiality and anonymity
- Explain incentive process
- **Media Release Form:** As discussed, the CMA is interested in listening to audio recordings of interviews. If participant agrees to allow us to share the audio recording of their interview with the CMA, Kantar Public would provide the audio recordings to the Competition and Markets Authority. NB this is optional and voluntary.
- If they are happy to for us to share the audio from their interview with the CMA, have them sign a media release form.



# Appendix F – Stimulus

