

Insight

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electricity
north west

Bringing energy to your door



Customer and stakeholder insights to help us make better decisions

Edition 06 – August 2024

Steph's introduction

I'm delighted to introduce the sixth edition of **Insight** which aims to improve knowledge sharing across the business and bring the lives, needs and opinions of our customers to life. It's easily said to 'put ourselves in our customers' shoes' but until you see and feel it, it's difficult for an organisation to really understand what's going on. This regular bulletin will help us all do just that.



On 31st July, we released our inaugural **Annual Vulnerability Report**. As we reflect on the start of the RIIO-ED2 period, we're filled with pride at the remarkable achievements of our colleagues, partners, and stakeholders. Make sure you check our top 10 highlights. Additionally, if you have more time, delve into the wealth of insights that showcase our deep understanding of vulnerability issues in the North West and our proactive efforts to address them.

In this edition, our featured stories illuminate the clarity we possess regarding our social role. We leverage insights to proactively **identify risks and safeguard customers from potential vulnerabilities arising due to changes occurring**. Importantly, we recognise that solutions to changes need not always originate within our organisation; but our convening power allows us to amplify awareness of existing support mechanisms.

If you want to work on some research or understand a particular group's views, let our research team know. Contact our Research and Insights manager, [Maxine Stiller](#).

How low can you go?



Low carbon technologies (LCTs) can deliver significant benefits for people, including lower bills, greater comfort, and improved health and wellbeing. This is demonstrated in polling: almost 9 in 10 people who installed LCTs in their homes in the last year would recommend them to a friendⁱ.

But too many people are still put off installing them. Making changes to your house can be scary and it can often feel like a big risk for households to take. Yet Government targets are high; aiming for 600,000 heat pumps to be installed each year by 2028- an 11-fold increase on the volume installed in 2021ⁱⁱ.



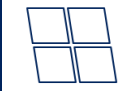

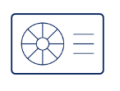
The recent election highlighted worries among voters about the cost of the changes aheadⁱⁱⁱ. Research reveals concerns among the public that climate change effects will be unequal, emphasising the need to protect vulnerable communities from undue burdens they didn't create and cannot avoid^{iv}.

Under an Ofgem Incentive launched in 2023/24, we can offer impartial guidance to those in need, facilitating customer installations, although we cannot not directly finance technology installations.

What does the research say?

This year, we completed the fourth phase of an independently facilitated bi-annual Low Carbon Technology (LCT) survey^v – a collaborative piece of research with other DNOs. This initiative has reached over 4,000 households and tracks understanding, perceptions and LCT adoption rates over time.

Table 1: Average LCT ownership December 2023 and consideration (next five years)

North West % - December 2023	LED bulbs 	Smart meter ^{vi} 	Solar Panels 	EVs 	Heat pumps 
Ownership	62%	50%	11%	6%	3%
Considering	66%	49%	37%	31%	30%

In the North West, our survey^{vii} found:

- Only 24% of electricity users feel confident in taking action towards net zero.
- 76% own gas boilers, higher than the GB average of 71%. 38% worry about the upfront cost, and 32% about running costs, of new heating systems.
- Cost is the main hurdle for adopting solar panels and EVs, which are of high interest in the region.
- Just 34% know about funding options like Warm Homes and ECO4, and only 7% have applied.
- There's a general hesitation about being aggressively marketed to after showing initial interest.



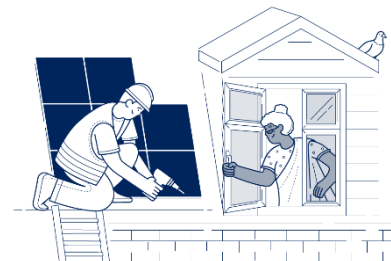
Insight

At risk electricity users want relevant and impartial information on LCT options and costs but want to avoid being 'pursued' and 'sold to'.

What does this mean for Electricity North West?

Electricity North West **launched a free advisory service in March 2024** to guide customers on low-carbon energy solutions. Trained advisors in our Connections and Customer Teams offer insights on products, costs, incentives, and FAQs. Our service focuses solely on providing expert advice, without any sales intent.

Our team engages with customers to **boost their confidence** in using technologies, such as smart meters. We recognise that this confidence may, in the future, enable them to participate in schemes such as [The ESO's Demand and Flexibility Service](#). However, we are also aware that some customers feel overwhelmed by constantly seeing their usage increase on the in-home display.



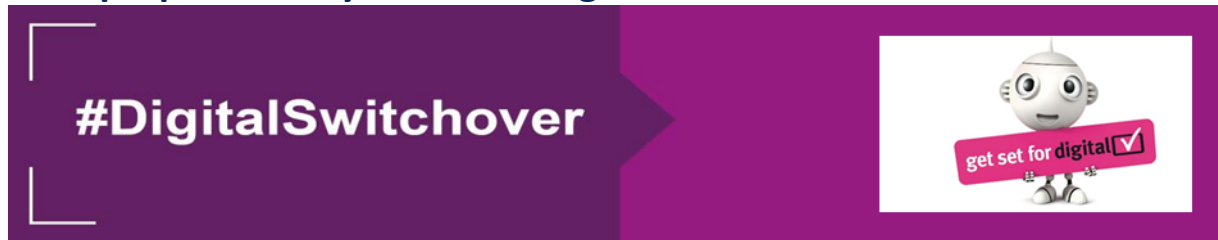
Initially tested with staff family and friends, it is expanding under **the 'Take Charge' umbrella** brand through social media, targeted communications, and local authority partnerships. Multiple contact methods, including a freephone number and a [microsite](#), are now available.

What could, and should we do differently?

To move forward with confidence, we need to rigorously test our advice service so that we can learn from feedback and enhance the customer experience. We measure success by the quality of our service, not just the quantity of customers assisted. To support our Customer Inclusion Team, you can:

1. Familiarise yourself with www.golowtoday.co.uk
2. Share social media posts with your networks to raise awareness
3. Give feedback on any aspect of Take Charge, by [contacting Jill Hendry](#)
4. Identify friends or family needing expert low carbon advice and refer them for [a free appointment](#)
5. [Let us know](#) of other large employers who may be willing to promote Take Charge to their staff?

How prepared are you for the digital switchover?



The UK's telephone network is changing. Between now and January 2027 customers will be moved from old analogue landlines over to new upgraded landline services using digital technology^{viii}. The migration process has started across the UK, with some BT and Virgin Media customers already being moved to digital voice. This means services that rely on the old copper landline system such as phones, healthcare devices and business equipment will be switched over. If you have an internet connection, the change may be as simple as plugging your phone into your broadband router rather than the socket on the wall.

What does the research say?

Amid growing concerns, the UK has extended its deadline for transitioning from the analogue telephone network to a digital, internet-based service from December 31, 2025, to January 31, 2027.

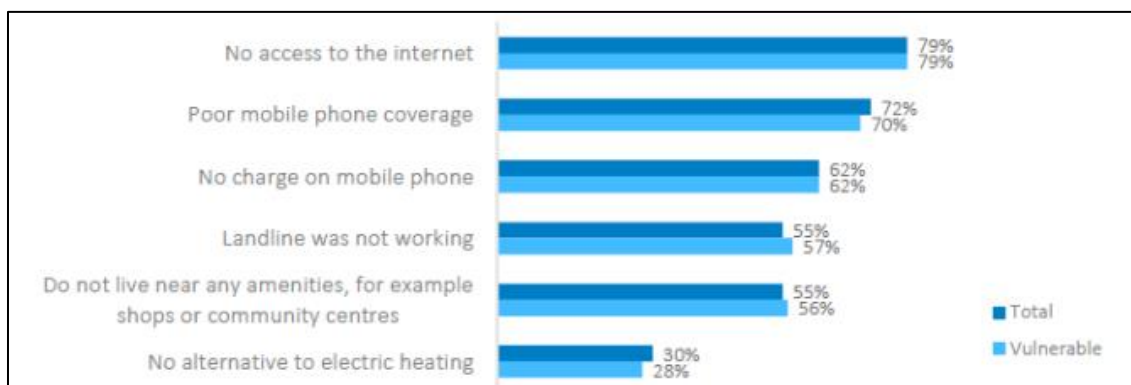
Despite this extension, our data reveals just 57% of customers (and 53% in the North West) are aware of the digital switchover^{ix}. This has increased from 26% in March 2023^x. The older people are, the more likely they are to know about the switchover.

Table 2: Q. Before today, had you heard about the digital switchover?

July 2024	UK	18-24	25-34	35-44	45-54	55-64	65+
Awareness %	57%	26%	37%	51%	67%	70%	72%

Among those who are aware, the most common concerns are the impact on others who rely most on the copper network (64%) and how they would make a call if there was a power cut (53%) This validates findings from our Storm Arwen Customer Research^{xi}, which evidenced that the loss of communication networks increased vulnerability and isolated customers.

Figure 1: The biggest challenges faced by 500 customers impacted by Storm Arwen





3% of landline users, their landline is their only option to make and/or receive calls in their homes^{xii}. For some consumers, the use of a landline is driven by inadequacies in other services, e.g. poor or no mobile connection in their home. As expected, issues with these connections appear to be more prominent for those in **rural housing** compared to those in urban housing^{xiii}.

Our telecoms engagement^{xiv} has also revealed a critical gap: identifying transmitters connected to our network is challenging. Phone towers, cells, and generators operated independently. While most masts have three-hour battery backups, some don't, or they fail. Consequently, communities face a heightened risk if power is interrupted. An example arose during our response to Storm Debi (November 2023). A backup generator connected to a Cumbria phone mast was buried in snow and failed to operate.

What does this mean for Electricity North West?

We are focused on urging national stakeholders to address the digital switchover risks for vulnerable populations. We must also use our influence to engage locally, raise awareness, and coordinate action.

However, we are still very concerned about the lack of solutions for customers in areas with poor or no mobile signal to contact us during interruptions.

We proactively engaged with Ofgem and Ofcom in May 2024^{xv} to share our insights. We are helping Ofcom by analysing storm-prone areas and regions at risk of losing mobile network coverage during power outages. This analysis will inform resilience guidance for telecoms providers.

What could, and should we do differently?

We can all play our part in raising awareness of the switchover.

- The Local Government Association has designed a [toolkit](#) for partners to use to raise awareness
- We can encourage vulnerable customers to contact their telecoms provider for support, including access to battery back-up packs which enable emergency calls to be made.

Our forward plan for 2024/25 includes expanding the testing of 'last gasp' and 'ping' communication with **smart meters to identify properties without power**. For at-risk customers who lose power, we can deploy **door-knocking teams to ensure their safety** and keep them informed. To better target our resources, we are co-funding the next phase of development of **an innovative data mapping tool to identify areas with reduced phone coverage and connectivity**.

Vulnerable businesses ask for more of a heads-up on scheduled outages

In 2019, our innovation project, the Value of Lost Load^{xvi}, revealed that supply interruptions have the most significant financial and social impacts during winter. This holds especially true for customers in vulnerable situations, such as those experiencing fuel poverty, residing in rural areas, or owning electric vehicles. **Businesses, particularly those in rural regions, are also significantly affected by these interruptions due to loss of productivity, income and potential reputational impacts.**

What does the research say?

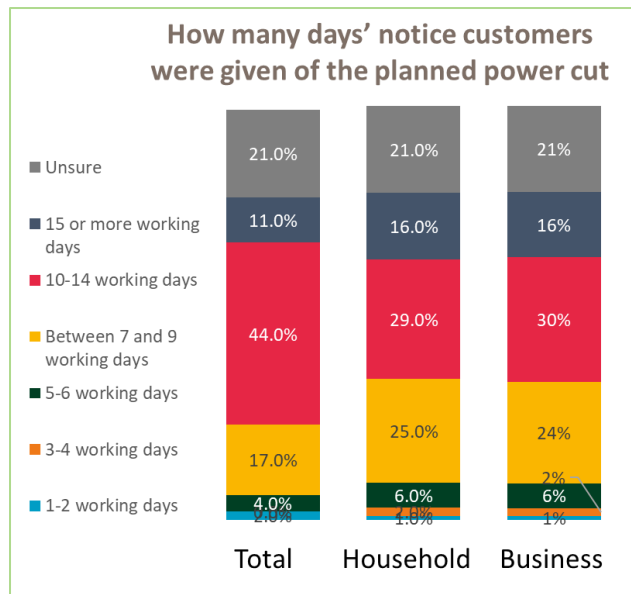


We conducted a deep-dive research programme and heard that SMEs have few, if any, business continuity plans in place to mitigate the impact of a power cut^{xvii}. In response, we launched a free

[Business Priority Services Register](#) in May 2019 for all our business customers. Working with our customers, we co-created materials and [business continuity advice](#), including information on how to assess risk and how to procure a generator.

Since its launch, 5268 business customers have signed up to the service enabling them to access **key benefits they told us they wanted to access, including 30 days' notice of a planned power cut**, exceeding the Ofgem standard of 10 days' notice.

Research during 2023/24 has revealed that customers who receive advance notice of planned power cuts tend to give satisfaction scores of 9 or 10 out of 10^{xviii}. This is because it allows them to make alternative arrangements.



However, businesses participating in our surveys are telling us that they are receiving similar advance notice to household customers. 63% say they receive up to 14 days' notice, however those on the Business ECR could be receiving up to 30 days. Our analysis indicates that this is a key factor in businesses scoring us lower across the board for this touchpoint.

What does this mean for Electricity North West?

There are 266,950 businesses in the North West registered for VAT^{xix} and about 196,000 connected to our network^{xx}, making up 8% of all customers, but a whopping 64% of total energy consumption!

Table 3: Meter Point Administration Number – connected properties in North West

July 2024	Domestic	Non-domestic	Extra High Voltage	Total
Volume	2,230,925	196,227	159	2,427,311
Proportion	91.91%	8.08%	0.01%	100%

This shows us that there is a **big opportunity to expand awareness and membership of the Business Extra Care Register**. However, to maximise our finite resources, we must first identify businesses that are most in need of support and extra care and target our awareness raising at them.

For example, to protect the storage of COVID-19 vaccinations in 2020/21 we proactively engaged with the NHS to identify locations at risk, should faults occur on our network and targeted awareness raising at pharmacies and GP surgeries. We've also targeted care homes who look after vulnerable people. By registering businesses who require extra care we can tailor the support services we provide.

What could and should we do differently?

As businesses have distinct needs compared to households, we understand the importance of staying attuned to their requirements when designing our services. Our challenge lies in elevating the visibility of the Business Extra Care Register in the years ahead. **We invite your suggestions on identifying eligible businesses, promoting the service effectively within spaces where businesses are likely to encounter it (including potential partnerships), and maximising our return on investment.**

Let us know what you think

This newsletter has been produced by Maxine Stiller, Research and Insights Manager, with support from our Independent research and insight partner, Create Clarity. **Please provide your feedback** by using [this](#) form. If you would like to share anything in future editions get in touch.

Maxine Stiller

Research and Insights Manager

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Director, Create Clarity

✉ Michael@createclarityconsulting.com**End notes (source material available from Maxine Stiller)**

ⁱ Online survey of homeowners in England and Wales who had looked into installing low carbon technologies in their home in the last year, YouGov, 4th-18th August 2023

ⁱⁱ Department for Energy Security and Net Zero (2023), Heat pump net zero investment roadmap

ⁱⁱⁱ [Why Sunak's net zero rollback won't pay off | British Politics and Policy at LSE](#)

^{iv} [About the smart & fair programme \(cse.org.uk\)](#)

^v Low Carbon Technology (LCT) tracker Wave 4 December 2024 2,002 interviews (GB and North West)

^{vi} Department for Energy Security and Net Zero - Smart Meter Statistics in Great Britain: [Quarterly Report to end December 2023](#)

^{vii} Low Carbon Technology (LCT) tracker Wave 4 December 2024 2,002 interviews (GB and North West)

^{viii} [Moving landline phones to digital technology: what you need to know - Ofcom](#)

^{ix} Digital phone switchover poll July 2024, 2,115 interviews conducted by Yonder Data Solutions on behalf of Create Clarity

^x Yonder, on behalf of Which?, surveyed 4,958 UK adults online between 29th November and 8th December 2021. [Data](#) was weighted to be representative of the UK population by age, gender, region, social grade, tenure and work status.

^{xi} Impact Research: Storm Arwen Lessons Learned Report (February 2022). Our Storm Arwen Customer Research included 500 customer surveys, 61 attendees at x8 focus Groups and x8 interviews with LRF representatives, and colleague (Contact Centre Management Team, HUB Management Team, Operations, Incident Manager) feedback.

^{xii} Ofcom Freedom of Information: Right to know request 18 December 2023: [landline and broadband coverage data](#).

^{xiii} House of Comms Library: [Rural mobile coverage in the UK: Not-spots and partial not-spots](#)

^{xiv} [Electricity North West SECV 2022/23-part-two.pdf](#)

^{xv} DAR in Tractivity from Ofcom/Ofgem discussion on PSTN switch off Tuesday 28 May 2024

^{xvi} [voll--summary-factsheet.pdf \(enwl.co.uk\)](#)

^{xvii} [2019-20-ofgem-stakeholder-engagement-incentive-scheme---part-three.pdf \(enwl.co.uk\)](#)

^{xviii} Customer Experience Tracking - Planned Service Interruptions. Customer feedback from period July 2023-March 2024. 641 interviews, with analysis conducted by Create Clarity.

^{xix} UK Business, activity, size and location: the number of businesses registered for VAT and or/PAYE 2023 September 2023 produced from a snapshot of the Inter Departmental Business Register.

^{xx} The Metering Point Registration System 2023/24