TRAVERSE

WALES&WEST
UTILITIES

Consumer Panel

Trial report

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1. Executive summary

Overview and objectives

Wales & West Utilities' consumer panel was launched in 2021 to gain regular insight from customers on strategically important issues and business activities. While the full panel will run through the RIIO-GD2 business plan period, this report covers the consumer panel's trial stage. This aimed to test the process and collect insight on specific topics, with an evaluation of the process built into the overall design.

The full objectives can be found in chapter 2.1.

Method

The consumer panel trial consisted of a mix of synchronous engagement (Zoom evening workshops) and asynchronous engagement (an online portal with 'homework' activities – Recollective – and two surveys). Details of the activities, objectives and platforms can be found in section 3.

The panel brought together 29 participants based in three regions of Wales & West Utilities' operating area – Mid and North-Wales (9 participants), South Wales (10 participants), and the south west of England (10 participants). Participants were recruited to be broadly reflective of the area, although ethnic minority representation was boosted to ensure an individual was not asked to represent a whole community. A full breakdown of the sampling quota can be found in chapter 3.3.

Topic findings

Wales & West Utilities and its role within the UK energy system
Participants joined the panel with a low level of understanding of Wales & West Utilities and their operations. The first session, intended to act as introduction to Wales & West Utilities was useful in building up participants' understanding, particularly a three minute video introducing the organisation and services they deliver[1]. By the end of this session, participants felt they knew more about the organisation and demonstrated an increased level of understanding (see chapter 4.1).

Wales & West Utilities' GD2 commitments
The consumer panel looked at three specific GD2 commitment areas:

- *Vulnerability and Wales & West Utilities Customers*
  Participants focussed on raising awareness of the Priority Services Register (PSR) and of the wider services available to vulnerable people. Some participants also felt that the definition of vulnerability was worth reviewing, arguing that not all parents with children under 5 should be classed as vulnerable, while other criteria, such as isolation

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[1] https://vimeo.com/499171003

and digital illiteracy should be considered and, in some cases, prioritised.

- *Safe and Reliable Gas Network*
  Raising awareness was also crucial to ensuring safety – with suggestions including boiler stickers and greater use of the Safety Seymour campaign.
- *Net Zero and the future of energy*
  Participants were unfamiliar with net zero as a concept, with few initial comments outside of clarifying questions in the early stages of the trial. The topic was explored in detail in the second half of the trial.

The role of individuals in the decarbonisation of domestic heat

Participants identified five key themes when considering their, and the wider general public's, role in decarbonising heat.

- Cost – across all locations, participants expressed concerns around the cost implications of decarbonisation – from high installation and increased running costs, particularly of new appliances, to ensuring grant schemes are available to those on low incomes.
- Disruption – some participants were concerned about the level of disruption decarbonisation would cause – both for individuals and for small businesses, particularly those run from home.
- Consumer choice – some participants were concerned that the move to decarbonise heat would lead to a reduction in consumer choice, where gas customers would be forced to change their appliances by either Government or their utility company.
- Transition to net zero – participants generally felt the transition to net zero was necessary, for the sake of future generations.
- Changes they are willing to make - participants were drawn to lower maintenance changes, particularly if they are fairly well established, such as a smart meter. This was in contrast to big, disruptive changes, like a new boiler.

The role of Wales & West Utilities in the decarbonisation of domestic heat

Participants identified key roles for Wales & West Utilities in the decarbonisation of heat: ensuring the network is safe and raising public awareness. Participants who focussed on the need to keep the network safe felt Wales & West Utilities should have little role 'beyond the meter'. A larger group of participants however felt that there was a role for the organisation in informing or educating the public – although Wales & West Utilities were not thought by participants to be an organisation they would go to for advice on home energy systems, preferring energy suppliers or local plumbers instead. As discussion progressed, a few participants started to question whether their gas network should have a greater role in engaging the public on local choices for decarbonisation.

Process evaluation

To evaluate the effectiveness of the process design, we developed an evaluation framework made up of five process objectives, outlined below, along with some key considerations for future engagement. The full findings can be found in chapter 5.

- Gain feedback on how to improve participant engagement experience for the main panel.
  - o Ensure a variety of engagement approaches are used; that small group discussions allow participants to learn from each other; encourage participants to join online sessions with video on; and keep online sessions at weekday evenings.
- Understand whether we were able to recruit and onboard participants to meet the desired sample.
  - o Allow for three weeks to recruit and a 10% drop out rate.
- Gauge whether the dynamics of the panel were affected by the inclusion of 16 – 18-year-olds.
  - o Younger participants in this trial did contribute but required support from the facilitator. Moving forward, it would be worth exploring options to provide additional support to younger participants who aren't gas customers.
- Understand whether offering materials in Welsh is sufficient to engage Welsh speakers.
  - o Ensure Welsh-speaking facilitators are used when hosting events in Wales, even when using English.
- Gain insight into topics (relevant to a gas distribution network) that participants would like to engage on.
  - o Consider participants' preference for supporting customers, particularly those in need, when determining future engagement topics.

2. Introduction

2.1 Context

Gas Distribution Networks (GDNs) are natural monopolies, and as such are regulated by Ofgem to protect consumers' interests. This includes setting standards and expectations around how GDNs engage with consumers and communities. Ofgem expects 'an understanding of stakeholder needs to be at the heart of the way companies run their business'.[2] Wales & West Utilities' approach to engagement is supported by three high-level principles: transparency, inclusivity and continuous improvement.

In line with this approach, in November 2020, Wales & West Utilities appointed Traverse to design and deliver a consumer panel that could run throughout the RIIO-GD2 business plan period (2021-2026).

Traverse is an independent research and engagement company. Our team members have a range of experience across engagement approaches, and we have a strong track record of supporting clients within the utilities sector to engage meaningfully with their customers and the communities they serve.

2.2 Objectives

The purpose of the panel is to enable Wales & West Utilities to gain regular insight from customers on strategically important issues and business activities.

The delivery of the panel has been split into two parts:

1. A trial to be held and assessed before the RIIO-GD2 business plan period begins in April 2021,

2. A full panel running thereafter, incorporating learnings from the trial and subsequent panel activities.

The trial aimed both to test the process and collect insight related to the topics discussed, with an evaluation of the process built into the design.

The trial objectives were therefore as follows:

Topic objectives

1. To build and gauge participants' understanding of Wales & West Utilities and its role within the UK energy system.

2. To build and consolidate participants' understanding of Wales & West Utilities' GD2 commitments.

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[2]https://www.ofgem.gov.uk/system/files/docs/2019/11/enhanced_engagement_guidance_final.pdf

3. To gain insight into the panel's perception of what decarbonisation of heat and achieving net zero means for them personally.

4. To gain insight into participants' perception of what the role of a gas distribution network should be in relation to achieving the decarbonisation of heat.

Process objectives

1. Gain feedback on how to improve participant engagement experience for the main panel

2. Understand whether we were able to recruit and onboard participants to meet the desired sample

3. Gauge whether the dynamics of the panel were affected by the inclusion of 16 – 18-year-olds

4. Understand whether offering materials in Welsh was effective in engaging Welsh speakers

5. Gain insight into topics (relevant to a gas distribution network) that participants would like to engage on

2.3 An online consumer panel trial

Given the context of Covid-19 and related restrictions on meeting face-to-face, Traverse designed a fully online approach for the trial. The engagement lasted for four weeks in total. This consisted of two weeks of synchronous (online zoom sessions) and asynchronous (online platform) activities, followed by two weeks of two surveys on the process and content. Twenty-nine participants were recruited across Wales & West Utilities' three regions to take part. Fuller detail of the methodology, recruitment and achieved sample is available in chapter 3.

2.4 Reading this report

This report covers all engagement carried out during the trial stage of the project, including the findings from the sessions and online platform, and the results from the trial's evaluation and suggested next steps.

The report is divided into an executive summary and five chapters.
- Executive summary: Overview of all findings
- Chapter 1: Introduction
- Chapter 2: Methodology
- Chapter 3: Topic findings
- Chapter 4: Process evaluation
- Chapter 5: Recommendations

Appendices are provided at the end of the report.

Quantifiers and interpreting findings

We use non-specific quantifiers to give relative weighting to qualitative data:

- 'Most' or 'majority' when a clear majority of participants shared a similar view
- 'Some' when a minority of participants shared a similar view
- 'A few' when a small number of participants shared a similar view

Where multiple views on an issue are presented, more prominent views are generally reported first. We use terms such as 'consistent', 'commonly held', or 'less common', to show the relative frequency of occurrence of views.

The small number of participants (27), and qualitative approach, mean that findings should be considered illustrative rather than statistically representative of public views. Where differences have been identified by location these are noted in the text. Differences between locations should not be interpreted as geographical patterns. As with all research, this report is a snapshot in time. People's views may change significantly in the future.

Use of quotes

Quotes are used throughout the report to illustrate points, not replace narrative. When using participants' own text, these are provided verbatim, without changes to spelling or grammar. The data the quote has been drawn from is also provided by a caption. For example: 'Session 1, Breakout group notes, South Wales'

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3. Methodology

3.1 Design overview

We designed the engagement process in three main phases, which focussed on:

1. Onboarding and building participants' knowledge of Wales & West Utilities.

2. Supporting reflection, discussion and eliciting participants' views on Wales & West Utilities' action around decarbonising heat and achieving net zero.

3. Collecting additional feedback and views from participants. The table below summarises the full engagement process.

Phase	Phase 1: Onboarding		Phase 2: Supporting reflection and discussion		Phase 3: Collecting feedback and additional views	
Date	22nd – 24th Feb	24th Feb	25th Feb – 3rd March	3rd March	5th – 12th March	12th – 19th March
Activity	Participant onboarding and first online activity	Session 1	Second online activity	Session 2	Survey 1	Survey 2
Goals	Equip participants to engage using the online tools Support participants to begin learning about Wales & West Utilities and the wider sector	Set the scene and ensure Panel Members understand remit of their involvement Panel members deepen understanding of Wales & West Utilities and its place in the wider energy system	Support reflection and consolidation of learning from Session 1 Support building a personal connection with the topics at hand, to encourage deeper engagement in Session 2	Build panel members' understanding of Net Zero, future of energy, and the de-carbonisation of heat Panel members reflect on how Net Zero and low carbon technologies will affect their lives, and what they expect from Wales & West Utilities	Gather feedback on the design of the panel from participants	Gather additional participant views on net zero and the decarbonisation of heat
Platform	Recollective and email	Zoom	Recollective	Zoom	Snap surveys	Snap surveys

The process evaluation and recommendations for future panel design are covered in chapter 5 of this report.

More detail about the 'activities' is provided at the start of each section of the findings reported in Chapter 4.

3.2 Platforms & logistics

Panel meetings: Traverse held two online, evening sessions on the 24th February and 3rd March 2021, from 18:30-20:00. We chose to use Zoom as the platform for these, due to increased public experience of using it over the last 12 months, as well as its stability and functionality. The sessions included a mix of plenary and virtual tables, supported by Traverse lead and group facilitators and note-takers. The three virtual tables each represented a part of Wales & West Utilities' operating area – see figure 1 for breakdown by location.

Platform activities: alongside the online evening sessions, participants completed online activities, as part of onboarding and between the two events. These were hosted on an online platform called Recollective.

Mindful of combatting digital exclusion, Traverse provided participants information in their welcome pack about how to use both Zoom and Recollective. We also encouraged participants to communicate any technical support needs, having asked about this in the recruitment screener.

Surveys: Two surveys were programmed and managed using Snap software.

3.3 Sampling and recruitment

Recruitment

An external partner 'Riteangle' undertook the recruitment. We provided them with a sample and screener for the recruitment of participants.

For this trial panel we over-recruited 29 participants, expecting between 24-29 to take part. 27 participants engaged with all aspects of the panel, while two participants dropped out.

Participants were incentivised to take part, with the possibility of earning up to £100 for attending both Zoom workshops, completing two sets of online Recollective activities, and completing two concluding surveys.

As Wales & West Utilities operates across the three regions of Mid and North-Wales, South Wales, and the south west of England we recruited from each of these areas to create the consumer panel and reflect the company's customer base. These areas are illustrated in Figure 1.

Figure 1

Sampling

The full sample for this panel can be found in the appendices.

We used prescribed quotas to ensure that the sample met a number of demographic and other criteria known to influence behaviours related to energy use:

- mix of key demographics (age, gender and ethnicity);
  - We sought to boost for ethnic minority representation to guard against an individual being asked to represent a whole community during sessions.

- inclusion of customers with long term health problems or disability;
- inclusion of a mix of socio-economic circumstances;
- a mix of people living in urban and rural environments; and
- include future consumers (16-18-year olds) as well as existing consumers.

All participants were recruited from households which use mains gas, but not all were current bill-payers.

We recruited two young people aged 16-17 to take part in the panel. In order to support their participation, we recruited them from the same location and hosted them at the same virtual table. The purpose was to gain insight into the dynamics of involving 16-17-year olds, who in Wales are of voting age, in the main consumer panel, or whether other engagement formats may be more suited. Given the small overall sample size, we chose

to involve only two participants, so as not to imbalance inclusion of other age groups.

Additionally, as two of the three regions that Wales & West Utilities serve are in Wales, we accommodated Welsh speaking participants by employing an external Welsh speaking associate to facilitate the North and Mid Wales group. Participants were asked in advance of the process by the recruiter, if they would be happy to take part in English, nobody was deterred by this from taking part. Whilst all participants said they would be happy participating in English, presentation slides were translated to Welsh for those who asked for them and the Welsh facilitator was available for any Welsh language needs.

Process reflections on these two specific recruitment quotas of age and language, are detailed further in chapter five of this report.

4. Topic findings

During this trial panel, we used the following four research objectives to focus our topic engagement:

1. To build and gauge participants' understanding of Wales & West Utilities and its role within the UK energy system.

2. To build and consolidate participants' understanding of Wales & West Utilities' GD2 commitments.

3. To gain insight into the panel's perception of what decarbonisation of heat and achieving net zero means for them personally.

4. To gain insight into participants' perception of what the role of a gas distribution network should be in relation to achieving the decarbonisation of heat.

The mix of activities through which Traverse collected feedback has provided rich data responding to these objectives, and our findings are detailed in the following pages against each of the four topic objectives.

4.1 Wales & West Utilities and its role within the UK energy system.

Key findings

Low initial awareness

The findings from Phase 1 of the consumer panel illustrate that initially most participants had a limited knowledge of Wales & West Utilities, as seen in data taken from the online discussion board.

A feeling of increased understanding

A combination of the introductory video and posters on Recollective, helped to build participants' understanding of the company. Prior to Session 1, the majority of participants answered all fill-in-the-blanks questions correctly showing that participants gained a base-level knowledge. The question with the most incorrect answers, was that asking who regulates a GDN.

By the end of Session 1, most participants either agreed or strongly agreed that they understood the role of Wales & West Utilities.

Activity Overview of phase 1

Phase 1: Onboarding

[Findings from the events and activities within this phase have been reported where appropriate within this chapter. Full data sets are available in the appendices.]

Participant onboarding and first online activities	Session 1
Participants watched an introductory video and read several posters on Wales & West Utilities, to provide them with a base understanding of the services offered. They then completed a short fill in the blanks activity to show what they had understood from the materials, and had the opportunity to introduce themselves to their peers in the 'Discussion' tab.	Participants were presented with three of Wales & West Utilities' commitment areas for the period between 2021-2026. These were: 1. Vulnerability and Wales & West Utilities' customers 2. Safety and reliability 3. Net Zero and the future of energy They had the opportunity to ask general questions during the plenary. In breakout groups participants then heard a carousel of introductions to the three commitment areas by Wales & West Utilities speakers. During the carousel participants could ask quick questions and give initial reactions. They then completed a short zoom poll to confirm their understanding.

Survey 2

Participants were asked to rank their order of priority for these three commitment areas and explain their reasoning.

Baseline Awareness of Wales & West Utilities

Discussion Board

14 participants interacted on the introductory discussion board on Recollective, nine of whom noted their varying levels of existing awareness of Wales & West Utilities. Two of these participants knew about Wales & West Utilities from their personal backgrounds:

> *"I've been aware of Wales & West Utilities for many years as two of my school friends went more or less straight from school to work on the vans."*

Recollective, Discussions Tab, 'Getting to know each other'

> *"I know of Wales & West and what they do from my previous jobs in plumbing and sales!"*

Recollective, Discussions Tab, 'Getting to know each other'

A few other participants had some basic understanding of the work of Wales & West Utilities, such as dealing with gas leaks and digging up roads for pipe maintenance work. However, on the whole participants displayed only a

basic knowledge of the company and were unaware of their specific services.

Whilst these initial comments, made prior to the sessions themselves, indicate a low base-level understanding of the role of Wales & West Utilities, several participants commented that the materials provided were useful in informing and building their understanding. For example, two participants noted that whilst they hadn't heard of Wales & West Utilities or knew little about them prior to engaging in this research, the materials had successfully informed them of their role.

"I have heard of Wales & West Utilities but know a bit more now after the video clip!"

Recollective, Discussions Tab, 'Getting to know each other'

"I have never heard of Wales & West Utilities company until now. But after watching the video I now know what the services are."

Recollective, Discussions Tab, 'Getting to know each other'

Fill-In-The-Blanks

In addition to these introductory comments from the discussion board, all 27 participants in the panel completed the fill-in-the-blanks activity prior to the first session.

The following six questions were posed to the panel, which they answered after having read and watched the introductory materials:

1. What does GDN stand for?

2. What is the GDN you use determined by?

3. Who are GDNs regulated by?

4. How many customers do Wales & West Utilities have?

5. How many kilometres does their customer base cover?

6. What do Wales & West Utilities do with gas?

The question most often answered incorrectly was *"Who are GDNs regulated by?"* With four participants believing it to be Wales & West Utilities at this stage of the process. Additionally, two participants believed that the GDN you use was determined by the amount of gas you use. However, all 27 participants answered question six correctly, noting that Wales & West Utilities transport rather than sell gas.

Each of these questions had multiple choice answers, and a clear majority of participants answered all questions correctly, indicating firstly that the materials were understood, and secondly that the panel had acquired a base-knowledge of the company, prior to the first session.

During Session 1 itself, discussions regarding Wales & West Utilities' GD2 commitments took place. These are detailed in chapter 4.2 of this report.

Zoom Poll

At the end of the first session we ran a Zoom poll to gauge participants' understanding of what they had heard and read so far in the process.
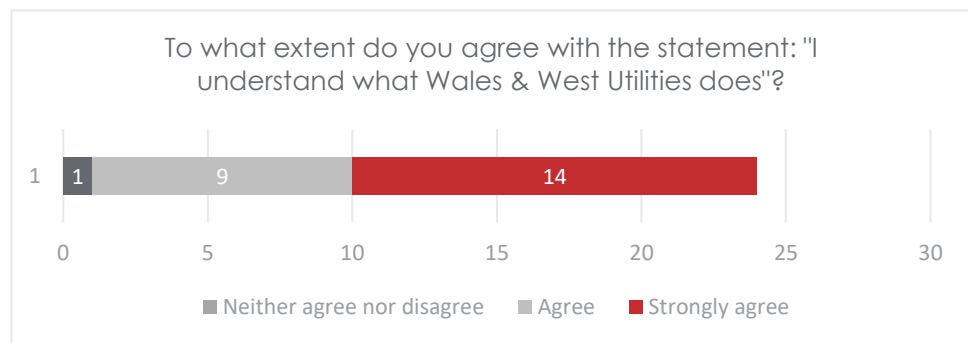

To what extent do you agree with the statement: "I understand what Wales & West Utilities does"?

Figure 2

26 participants attended this session, and 24 completed the poll. Two participants were unable to answer the questions due to technical difficulties. Therefore, a combined total of 23 participants agreed or strongly agreed that they understood the role of Wales & West Utilities by the end of Session 1. This illustrates that from a participant perspective, the activities and presentations up until this point had been successful in starting to build knowledge and understanding of the company.

4.2 Wales & West Utilities' GD2 commitments

Key findings

Vulnerability and Wales & West Utilities Customers:

Out of all the performance areas, customers made the most comments about the commitments related to customers in vulnerable situations. They felt it was important, that public awareness of the Priority Services Register (PSR) be raised, and that customers should be educated and made aware of the services available to them. They also queried the definition of vulnerability, and why certain characteristics such as having young children would make you eligible for the PSR. Participants started to question and make suggestions about how to better reach vulnerable audiences, such as phoning or visiting in person isolated or elderly customers, or those who are not online. This performance area was deemed the top priority for a consumer panel to focus on in the next 12 months.

Safe and Reliable Gas Network:

Similarly, participants saw raising awareness as essential when considering safety. They gave suggestions, such as boiler stickers with contact details and more use of the Safety Seymour campaign. The South West group made comments surrounding the significant potential impacts of carbon monoxide poisoning and the need to ensure the safety of customers surrounding this issue.

In terms of reliability, they raised questions as to the use of plastic pipes and whether this was environmental or economic, and whether they would be reliable long-term. However, they seemed to accept the explanations provided by Wales & West Utilities.

A safe and reliable network was ranked the top priority for Wales & West Utilities to focus on going forward, but not for the panel to engage with themselves. Safety was deemed a fundamental responsibility of the company and therefore not a topic that needs to be discussed by the panel itself.

Net Zero and the future of energy:

At this stage, there was less discussion around the future of energy, but it was evident that the topic of net zero was new to most participants and they had questions about it as a result. Further views on this topic are reported on in sections 4.3 and 4.4.

Later in the process, the future of energy was not seen as a priority for the panel to discuss in future. We could assume this was linked to it having been covered in Session 2, however, participants also gave views that engaging about vulnerability was a priority.

During Session 1, the panel focused on the GD2 commitments in the following three performance areas:

1. Vulnerability and Wales & West Utilities' customers
2. Safety and reliability
3. Net Zero and the future of energy

Vulnerability and Wales & West Utilities' customers

This commitment area around customers in vulnerable situations was not mentioned by participants during the plenary section of Session 1, however it was a key focus during the carousel in breakout groups.

At large there was praise for the Priority Services Register, however most participants agreed that this service required more publicity. A few participants suggested that Wales & West Utilities should advertise it more heavily, noting that they were previously unaware of its existence despite

living in the area.

"I think the PSR should get more publicity – never seen anything on social media – really great service"

Session 1, South West, Breakout Group Notes

Participants also demonstrated some confusion and disagreement as to who fits the definition of vulnerable. Even those who may be vulnerable themselves were unaware of the service and therefore not taking advantage of it.

"I have a child under 5 and I don't see why that should make me a priority or vulnerable to be honest"

Session 1, South West, Zoom Chat

"I'm classed as vulnerable, with the water, so what about the gas I know nothing about that?"

Session 1, South Wales, Breakout Group Notes

Some participants went on to make suggestions as to how to better serve customers in vulnerable situations, considering age, isolation, and digital illiteracy as key contributors to requiring extra attention.

"I automatically think of my grandmother who lives alone. She comes from a rural village in NE Wales. Letter come through the post and no real contact with the customers. Maybe opportunities for people to drop by or phone calls."

Session 1, North and Mid Wales, Breakout Group Notes

"How do you contact the people? Some people are not online."

Session 1, North and Mid Wales, Breakout Group Notes

Safety and reliability

Similarly, when discussing safety and reliability, a key issue raised with regards to the role of Wales & West Utilities was that of public awareness and information dissemination. For example, multiple people noted that they did not know which number they should ring or who they would need to go to for help in the case of a gas emergency. One participant suggested stickers on boilers with this information would be practical and helpful to customers.

"I never knew this number existed!"

Session 1, South West, Zoom Chat

"It might be worth making the emergency number printed on the

boiler or something (even when having a gas safety check etc)"

Session 1, South West, Zoom Chat

Others stated that they had never heard of Safety Seymour and thought that all schools should be more informed of the materials available to them.

"Do all schools get visited by Safety Seymour as I have never heard the grandchildren mention him"

Session 1, South West, Zoom Chat

We can infer from these comments, alongside those regarding the Priority Services Register, that there is a general lack of clarity and awareness surrounding the services that Wales & West Utilities provide. This suggests that whilst taking part in the trial panel was informative for participants, there is a wider need for this information to be shared more broadly throughout the public.

Additionally, participants seemed interested in the commitment to upgrade pipework (which they heard about in this performance area, as well as the future of energy). A recurring topic of interest related to this, centred on the use of plastic pipes. Participants commented on the longevity of the pipes and the environmental impact of using plastic, as well as both the disruption and cost caused by their installation.

Whilst participants didn't use the Zoom chat extensively during the plenary session, some comments were made regarding this use of plastic.

"I thought plastic waste was a huge global issue at the moment and 80 years doesn't seem sustainable to me."

Session 1, Plenary, Zoom Chat

"Is replacing metal pipes with plastic ones environmentally friendly?"

Session 1, Plenary, Zoom Chat

This conversation then carried over into the breakout room discussions where participants questioned the speakers about this issue during the carousel activity.

"It strikes me that the lifespan of plastic pipe is 80 years, which is under half lifespan of metal pipes which is around 200. Is it economical to change it throughout?"

Session 1, North and Mid Wales, Breakout Group Notes

"Carbon zero is good but I don't know how they are going to be replacing metal pipes with plastic- there will be lots of disruptions on the roads".

Session 1, South West, Breakout Group Notes

These comments on the pipes reflect two themes. Firstly, is that of impact, both environmental and due to the disruption of works, and secondly reliability, with regards to longevity of materials and future costs. On the whole, participants then accepted the rationale for plastic pipes as explained by Wales & West Utilities speakers in response to their comments and questions.

Finally, there were a few participants who commented on the risk posed by carbon monoxide poisoning. This discussion did not cross into all breakout groups but was raised in the South West group due to one panel member's personal experience. Participants in this group agreed that safety is essential as there is a risk to human life.

Net Zero and the future of energy

During Session 1, there was less discussion of net zero and the future of energy, however a few participants asked for a definition of biomethane, whilst others indicated that this was altogether a new topic for them.

"What is biomethane?"

Session 1, North and Mid Wales, Zoom Chat

"The hydrogen, above everything, that's really interesting"

Session 1, North and Mid Wales, Breakout Group Notes

*"**Speaker:** Have you been thinking about net zero yourselves?*
__Participant:__ I have not thought about it much. Feel like I'm learning quite a bit today."

Session 1, South Wales, Breakout Group Notes

Participants explored this GD2 commitment in more detail during session 2 which is evidenced in sections 4.3 and 4.4 of this report.

Survey 2

Participants completed two surveys following the two panel meetings and activities on Recollective. Survey 2 focused on the topic research objectives of this panel and extracted participant opinion on the GD2 commitments with closed questions.

The first question in the survey asked participants to rank the three GD2 commitment areas discussed in order of which they thought should be Wales

& West Utilities' priority. The results of this question are depicted in the chart below, with a 'safe and reliable gas network' being ranked the most important priority by panel members, followed by supporting vulnerable customers, and lastly preparing for the future.
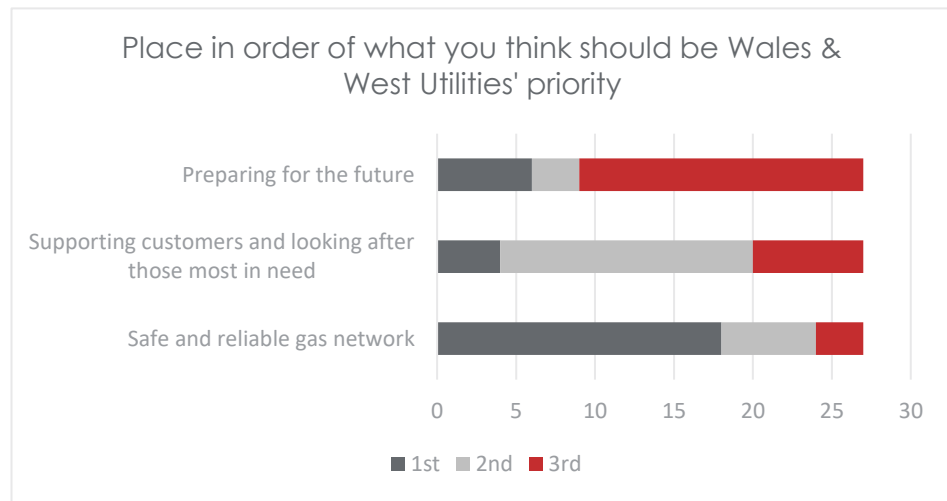

Figure 3

When giving reasons for their choices, most participants indicated that safety was the top priority.

"Safety always has to be the top priority and there is no point preparing for the future if the network is not reliable"

Survey 2, Anonymous, Question 2

"Although I think the safety of customers is most important, having a safe network is overall safer for everyone."

Survey 2, Anonymous, Question 2

Question 2 of the survey then asked participants to rank the three commitment areas discussed in order of priority for the consumer panel to focus on over the next 12 months. While this data is pertinent to a process
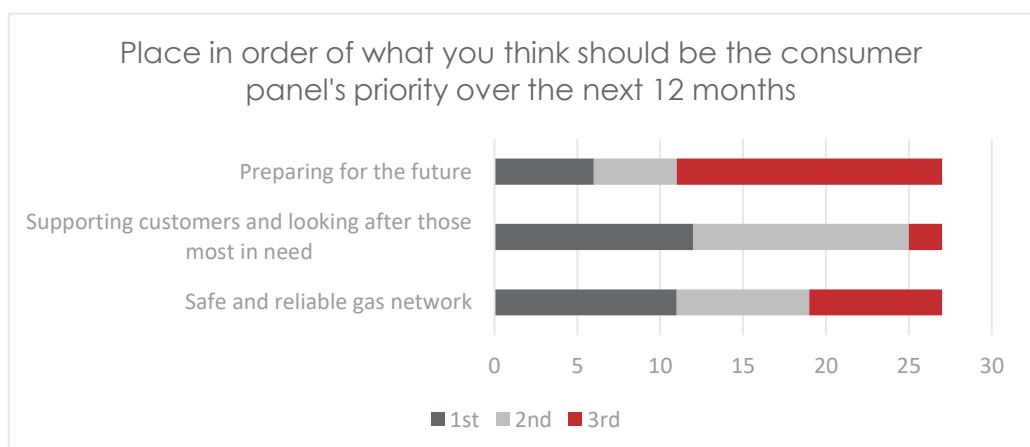
objective, we have summarised the findings here, as it provides further context to participants answers to Question 1.

Figure 4

As depicted in the above chart, a 'safe and reliable gas network' and 'supporting customers and looking after those most in need' had a far more even spread of prioritisation in this context, while 'preparing for the future' remained the third priority with 16 participants ranking it as least important.

We could make an initial assumption that the lower prioritisation allocated to the latter, is due to it having been covered in Session 2 of the trial panel. However, we can see some further explanation as to the difference between overarching priorities for the company, and the priorities for the consumer panel, in participants' explanations in question 4:

"I ranked the safety of the network last because I don't think this is something that consumers should be involved in or could have any useful input. This is WWU are of expertise not the public."

Survey 2, Anonymous, Question 4

"The customer panel doesn't really need to have much input on the safety and logistical side of things. The support for vulnerable people and future plans should be the main focus of the future consumer panels."

Survey 2, Anonymous, Question 4

Interestingly, the survey indicates that safety and reliability is viewed as a particularly important commitment by participants, but that they believe this is a matter for Wales & West Utilities to address and does not depend on public input via the consumer panel. This is consistent with other public engagement Traverse has been involved with for energy networks, where the public has viewed safety as fundamentally important, but something that the networks should be delivering as standard. Instead, the commitments aimed at supporting customers in vulnerable situations, gained in importance when relating to the consumer panel's future focus. In terms of a priority for Wales & West Utilities, and for the consumer panel, planning for the future was the lowest priority of the three commitments. It could be that this is due to participants completing this survey after having covered this third topic during Session 2, and therefore they may have seen this subject matter as sufficiently covered already.

4.3 To understand what role individuals expect to play in the decarbonisation of domestic heat

Key findings

Key themes in the data included cost, disruption and consumer choice.

Cost:

Across all locations, cost concerns were the dominant theme over the second session. Participants expressed concern about both the installation costs and the running costs involved in switching to low carbon heating systems. Participants also expressed concern that individuals who had recently replaced boilers would have to replace these newly installed boilers with greener models, at an extra cost. Participants suggested that grant schemes should be in place to help those on low incomes, to be able to afford the switch to low carbon technologies. Alongside this concern, some participants hoped that efficiency savings from greener technologies had the potential to reduce bills in the long run.

Disruption:

A few participants expressed concern about disruption associated with the installation of low carbon heating systems. Some participants felt this would be disruptive in general, and other suggested it could disrupt businesses that are run from home. Participants also expressed concern about the reliability and teething issues, that could be associated with a new heating system.

Consumer choice:

Participants were concerned about whether they would get a choice when switching to low energy heating systems. Some participants were concerned that customers would be forced to change, or that change would be dictated by their utility company. A few participants also raised concern about whether those in social or private rented homes would have a say in any changes.

The transition to net zero:

Participants reflected on the necessity and the inevitability of moving to low carbon heating systems, suggesting change is needed for the sake of future generations. Participants thought the decarbonisation of heat would reduce emissions and be better for the environment.

Changes participants would be willing to make:

Most participants indicated they would be likely to switch to using a smart meter and to insulate their home, if they had not already done so. In contrast, most participants said they would be unlikely to use an electric heating system such as a heat pump. It must be noted that they had not been given particular information during the trial about electric heating options. Participants were split on whether they would switch to using biomethane/hydrogen boilers or hybrid boilers, with many being unsure. Some participants had already changed their cooking appliances, the

others were split in whether they would do so in the future.

Activity overview of Phase 2

Phase 2: Supporting reflection and discussion

[Findings from the events and activities within this phase have been reported thematically within this chapter. Full data sets are available in the appendices]

Second online activities	**Session 2**
Participants were asked to observe and record their interactions with domestic heat and use of gas over a 24-hour period.	Participants listened to a presentation by Wales & West Utilities on the decarbonisation of heat and what this could mean for consumers. Participants were asked what they thought decarbonisation of heat meant for them. Participants were also asked for their views on Wales & West Utilities' current role in helping to decarbonise heat.

Survey 2

Participants answered questions on achieving decarbonisation of heat in UK homes, the changes they would be willing to make, the benefits and concerns of low carbon heating, influential factors on the decision to choose a lower carbon heating system, who they would get advice from, and whether Wales & West Utilities should be helping customers to decarbonise their heating.

Hopes and concerns relating to individuals and the decarbonisation of heat

Cost

The most frequent theme with regards to the role individuals expect to play in the decarbonisation of heat, was that of cost. This was reflected in both the online sessions and Survey 2, in which most participants identified cost as their main concern about future low-carbon heating systems.

A few participants expressed concern about cost in general terms.

"Cost is always important"

Survey 2, Anonymous, Question 10

However, most participants illustrated concerns specifically about the installation cost of new appliances (especially boilers).

"For me I'd be most worried about installation cost"

Session 2, South West, Breakout Group Notes

This specific concern also surfaced in Survey 2, question 9, in which participants were asked to select factors that would influence their decision when choosing lower-carbon heating systems. 17 participants selected installation costs as a key factor in this decision, suggesting that if such systems came at a high monetary cost, most participants would not be so willing to install them.

Moreover, some participants expressed concern that they had only recently replaced their gas appliance (mainly boilers). They worried their new appliance would be out of date and would need replacing sooner than planned. This concern surfaced in all three locations and was a major theme in the breakout group discussions. The majority of participants expressing this worry were concerned about the additional cost incurred as a result of needing to replace appliances. However, a couple of panel members also suggested this approach would be wasteful.

"It's just a throwaway society. We need everything new and get rid of the old stuff"

Session 2, North & Mid Wales, Breakout Group Notes

Related to this, one participant from North and Mid-Wales voiced concern about private landlords offloading the installation costs of new appliances onto the tenant, causing their rent to rise.

"Landlords are going to offload that, so rents will go up and it's going to be a lot dearer to rent. You're saying £500 off your bills but in the start with rent going up it's going to go up"

Session 2, North & Mid Wales, Breakout Group Notes

Participants were mindful that some people may struggle to afford to pay for changes to their homes. A few panel members suggested financial assistance for low-income households to be able to afford to change appliances. Panel members asked whether the government would provide grants or incentivise the installation of net zero appliances.

"Will there be any government grants, like with solar, to help with new boilers/cookers. Or will there be incentives for suppliers with regards to this?"

Session 2, South Wales, Breakout Group Notes

Furthermore, several participants expressed concern about potential increases in the cost of bills.

"Well, it's about the cost – if bills go high people will struggle with it. And the cost of having it all put in the house won't be free either"

Session 2, South Wales, Breakout Group Notes

This concern also surfaced in Survey 2, question 9, in which most participants identified running costs as a key factor that would influence their decision to change to a low carbon heating system. These cost related concerns were seen consistently across the different locations.

"If it's higher than now then I better just keep the old one – otherwise it'll be a struggle to pay for the bills"

Session 2, South Wales, Breakout Group Notes

The gas diary activity prior to Session 2 demonstrated that some participants had the cost of their bills in mind when using gas at home. A few participants also expressed surprise at the extent of their gas use.

"I try not to set my gas too high… because of the price of gas. Mum would always say put a jumper on rather than putting the heating on"
Recollective, Anonymous, 'Gas Diary Activity'

Interestingly, alongside this widespread concern about costs, a small number of participants suggested that despite initial installation costs, they thought new equipment may in fact reduce bills in the long run.

"More efficient equipment to help the environment and hopefully save customers money in the long term"
Survey 2, Anonymous, Question 7

This quote indicates that whilst the majority of comments surrounding cost were raising concerns with increased spending, there was some positivity that the changes could be used to address affordability issues.

Disruption

Concern about disruption in general surfaced in Survey 2. A small number of participants expressed concern about potential disruption caused by the

installation of new low-carbon heating systems.

In Survey 2, one participant indicated that disruption from installation could impact businesses that are run from home.

"Disruption - my wife's a childminder (registered) so would/could impact her business"

Survey 2, Anonymous, Question 10

Meanwhile, others raised concerns with the general disruption and upheaval of installing new domestic appliances.

"How much disruption will it all be? Having new boilers and cookers in? I've only just replaced mine – how's that going to affect me?"

Session 2, South Wales, Breakout Group Notes

In Survey 2, a few participants also indicated that reliability would be an important factor influencing their decision to switch to low carbon heating systems, listing it as their main concern. This suggests that it was important for panel members that disruption is limited by maintaining a reliable service.

"Obviously new system need bedding in so unreliability would be a factor - teething issues"

Survey 2, Anonymous, Question 8

Overall, several participants identified disruption associated with installation as a major factor that would influence their decision when choosing a lower-carbon heating system in the future.

Consumer choice

Participants discussed various aspects of consumer choice in relation to the decarbonisation of heat. Panel members expressed concern about whether they would get a choice to switch to low-carbon energy systems or whether change would be mandatory. For example, a few participants asked whether this change would be dictated by the utility company in the area or potentially restricted by what the local plumber can offer.

"Will customers be forced to change?"
Session 2, Plenary, Zoom Chat

"Does this mean you will not have a choice in what system you have? It will be dictated by what the utility company decide for the area?"
Session 2, Plenary, Zoom Chat

A few participants also asked whether those living in social or private rented housing would have a say in changes to their homes. It could be inferred from these questions that the participants felt this autonomy was important

for the tenant.

"I'm in a rented place by a private landlord. What's going to be the implications for private landlords. Is it going to be made law? I am trying to save to buy but if I'm still in private rented, what's going to be the implication then?"

Session 2, North & Mid Wales, Breakout Group Notes

However, some participants stated that they were comfortable not having a choice because drastic measures are necessary to combat climate change. In this way, some panel members' comments appear to reflect the GD2 commitment of planning for the future, as they are considering the impact and potential mitigations of climate change. An example of this can be found in one participant suggesting that the government needs to enshrine in law a requirement for private and social landlords to fit the most efficient and modern systems into their properties.

The transition to net zero

Some participants spoke in general terms about the inevitability and the necessity for changes to take place to tackle climate change. These participants emphasised the need to look forward and think about future generations, and therefore their comments reflected the GD2 commitment of planning for the future.

"You've got to look at the bigger picture – it's for the kids."

Session 2, South Wales, Breakout Group Notes

In Survey 2, participants were asked what they thought the main benefits of future 'greener' low carbon heating systems would be. Most participants suggested greener systems would reduce carbon emissions and be better for the planet and the environment in general.

"Reducing carbon emissions and therefore less greenhouse gases. I think it is a very important issue as our planet is being destroyed by human activity"

Survey 2, Anonymous, Question 7

Related to this, in Survey 2, question 9, participants were asked to select factors that would most influence their decision when choosing a 'greener' lower-carbon heating system in future. A few participants chose the 'less environmental impact' option, indicating a desire to choose more environmentally friendly heating systems.

"The environmental impact is most important because that is the reason to change heating systems in the first place"

Survey 2, Anonymous, Question 9

At the same time, a few panel members were cautious about the speed of decarbonisation, suggesting they did not want changes to happen too quickly.

"Facilitator: would you want WWU to try to decarbonise faster? Participant: No! I've only just changed by boiler – I'd want to wait a bit"

Session 2, South Wales, Breakout Group Notes

Changes participants would be likely to make to decarbonise their homes

In Survey 2, participants were asked how likely they were to make various changes to help decarbonise their home heating systems.

The majority of participants indicated they had either already changed to a smart meter system or that they are likely to do this in the future. Similarly, most participants said they have either already insulated their homes or are likely to do this in the future. No participants rejected either of these options.

In contrast, most participants reported it was unlikely they would switch to an electric heating system such as a heat pump. However, a few participants did indicate that they are willing to make this switch. It must be noted that participants were not given much information in plenary about fully electric options for lower-carbon heating.

Participants gave a range of responses when asked whether they would change from a natural gas to a hydrogen or biomethane heating system. This question elicited the most 'don't know' responses, potentially indicating a lack of understanding of the benefits and costs involved. However, more participants suggested they would be willing to make this switch than not.

Similarly, participants gave a range of responses when asked whether they would be prepared to change to a hybrid heating system which can use hydrogen/biomethane gas and electricity. Again, this question elicited more 'don't know' responses than other options. Participants were roughly evenly split between those indicating they were likely to make this change and those who were unlikely.

In terms of changing cooking appliances, a small number of participants said they had already done so. Again, participants were roughly evenly split between those indicating they were likely to make this change and those who were not.

For a full understanding of this data, please refer to the appendices.

4.4 The role of Wales & West Utilities in the decarbonisation of domestic heat

Key findings

Two key themes emerged from this data with regards to panel members' views of the role of Wales & West Utilities in the decarbonisation of domestic heat. Both the need to raise **public awareness, and safety** were deemed important by participants.

Interestingly, in discussion groups participants disagreed over Wales & West Utilities' role in the decarbonisation of domestic heat. Some believed the company to only be required to prepare the network and keep it safe, whilst others felt they also had a duty to customers to inform and educate them about upcoming changes to the systems. Most participants suggested that Wales & West Utilities should play some role in informing the public.

In Survey 2, opinion remained mixed, but many participants commented on the importance of educating customers to be able to understand and make decisions.

However, in Survey 2, participants also indicated that Wales & West Utilities are not who they would approach first for advice about their home energy systems. It can be inferred that providing such advice was not seen as an essential facet of the company's role by the panel. Participants most commonly reported that they would seek advice from their energy supplier or local plumber. Interestingly, more participants said they would seek specialist energy advice or advice from the national government, in three years' time compared to tomorrow.

Wales & West Utilities' role 'beyond the meter'

When asked in Survey 2 whether or not they thought Wales & West Utilities should be helping customers decarbonise their home heating, 10 people explicitly said yes, whilst four explicitly said no. The remaining 13 participants were less direct, however most of these focused on the importance of educating customers to be able to understand and make decisions.

In discussion groups, a few participants suggested Wales & West Utilities should stick to replacing pipes and maintaining the network. Similarly, in Survey 2, a couple of participants suggested that the decarbonisation of heat is the job of gas suppliers, not gas distributors.

"Just keep the network safe and reliable!"

Survey 2, Anonymous, Question 13

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Other participants disagreed, suggesting Wales & West Utilities' role should be wider, and acknowledging that the company will play a role in deciding what kind of gas customers receive. Whilst this was not evident in every breakout group, it did come through in the survey data.

"P1: Stick to just getting pipes ready"

"P2: Don't think it's' their responsibility to do any more than that"

"P3: Well it kind of is because they'll decide what kind of gas you will have ultimately"

Session 2, South Wales, Breakout Group Notes

"Yes, it has a duty as an instrumental part of the energy infrastructure to help make the public aware and to make informed choices."

Survey 2, Anonymous, Question 10

As noted, most panel members who thought Wales & West Utilities did have a role to play in the decarbonisation of heat 'beyond the meter', thought this role involved informing the public about incoming changes.

"WWU has a duty as an instrumental part of the energy infrastructure to help make the public aware and to make informed choices"

Survey 2, Anonymous, Question 13

Public awareness

This notion of public awareness of decarbonisation was further emphasised by participants stressing a need to know what is going on in order to plan for the future. Some participants commented that this panel was the first time they had been made aware of decarbonisation.

"Had I not been part of this I would be oblivious to this huge change in infrastructure."

Session 2, North & Mid Wales, Breakout Group Notes

Some participants emphasised the importance of public awareness in relation to a general concern about being unaware of coming changes. Similarly, some participants wanted to be kept in the loop to prevent them purchasing out of date appliances. Many panel members emphasised the need to consult with the public early around intended changes, to enable the public to prepare themselves financially for the transition into lower-carbon energy systems.

"Just telling people so they're more aware. For instance, someone said their boiler is coming to end of lifespan. If you hadn't been on this call, would you know that was an option?"

Session 2, North & Mid Wales, Breakout Group Notes

"I might be buying a gas boiler not knowing I should be switching over"

Session 2, North & Mid Wales, Breakout Group Notes

Participants disagreed over who should be responsible for raising this awareness and providing information about net zero. Most participants suggested that Wales & West Utilities should play some role in informing the public. In Survey 2, a couple of participants noted that the perception of Wales & West Utilities as impartial could make customers more willing to listen to their advice about decarbonisation. A few other participants suggested that Wales & West Utilities should work together with energy suppliers to deliver information.

"It's important that we know what's going on. Information and keeping people informed - like this panel"

Session 2, South Wales, Breakout Group Notes

"WWU should give their customers more info about changing and funding options"

Survey 2, Anonymous, Question 13

In contrast, a few participants suggested that ultimately the government was responsible for raising awareness, and that Wales & West Utilities should not concern themselves with this.

"WWU's role is to maintain the network and achieve net zero relating to this only, so I don't think it is their responsibility to advise customers on heating systems"

Survey 2, Anonymous, Question 13

Safety

As detailed in chapter 4.2 of this report, in Survey 2 participants ranked the safety and reliability of the gas network as the highest priority for Wales & West Utilities to focus on. Some participants also indicated that safety would be an important consideration for them when choosing a lower carbon heating system.

"Safety should always be first priority"

Survey 2, Anonymous, Question 2

A couple of participants emphasised the importance of feeling safe at home and raised concerns over whether hydrogen in particular posed a risk.

"The safety of hydrogen heating would be my main concern if I lived in built up areas and cities"

Survey 2, Anonymous, Question 8

"Hindenburg?"

Session 2, South West, Breakout Group Notes

Where participants would go for advice

Following discussions of public awareness and safety, participants commented on who they would approach for advice about their gas and home heating system.

In Survey 2, participants were asked where they would go for advice about changing their heating systems, either tomorrow or in three years' time.

For both questions, participants most commonly reported they would seek advice from their energy supplier or local plumber. After this, participants were evenly split between seeking advice from a Gas Safe registered engineer, the local council, or a gas distribution network such as Wales & West Utilities.

Interestingly, more participants said they would seek specialist energy advice or advice from the national government, in three years' time compared to tomorrow.

In both variations of this question Wales & West Utilities were not currently seen by participants to be the first port of call when seeking advice regarding their heating systems. Therefore, we can infer that this was not viewed as an essential element of the company's role.

Discussion and recommendations, around how the process informed the depth and quality of discussion on these subjects, are covered in the next two chapters of this report.

Gauging final understanding

Survey 1 was useful in identifying participants' understanding at the end of the trial consumer panel process.

At the end of the trial consumer panel process, we wanted to check whether participants understood the roles of the individual and Gas Distribution Networks. The data from Survey 1 indicates that most participants felt they understood how they may be affected by changes needed to reach net zero, how GDNs contribute to achieving net zero, and more specifically what Wales & West Utilities does.

This data can be found in the appendices.

5. Process evaluation

In this trial, our overarching goal for the process evaluation was to surface insight into what worked well, and what could be improved for the main panel going forwards. Our process objectives are listed in the table below.

To evaluate the effectiveness of the process design, we developed an evaluation framework which we used to shape how we compiled **observational data** (what we saw and heard during the sessions and on Recollective) together with **feedback from participants and staff** on the design of the activities, which came through debriefs and reflections after each event, and two surveys that were administered to participants.

A summary of our evaluation framework is included here, and our process evaluation findings are organised against each objective in the following pages.

Process objective	Data source/s
1. Gain feedback on how to improve participant engagement experience for the main panel	• Facilitator and speaker reflections after session 1 and 2 • Participant comments from session 1 and 2 • Participant feedback via Zoom polls and survey 1
2. Understand whether we were able to recruit and onboard participants to meet the desired sample	• Comparing participant data with the desired sample
3. Gauge whether the dynamics of the panel were affected by the inclusion of 16 – 18-year-olds	• Facilitator reflections after session 1 and 2
4. Understand whether offering materials in Welsh is sufficient to engage Welsh speakers	• Facilitator reflections after session 1 and 2 • Participant feedback via survey 1
5. Gain insight into topics (relevant to a gas distribution network) that participants would like to engage on	• Participant feedback via survey 2

5.1 Participant engagement experience

Process objective	Data source/s
1. Gain feedback on how to improve participant engagement experience for the main panel	• Facilitator and speaker reflections after session 1 and 2 • Participant comments from session 1 and 2 • Participant feedback via Zoom polls and survey 1

We have organised our findings against our first process objective into the following five themes:

- The overall experience

- Information provision and supporting learning

- Making the most of small group discussions

- The benefits and challenges of a digital approach

- Scheduling live sessions

5.1.1 The overall experience

Overall, feedback from Wales & West Utilities speakers and observers, and from facilitators indicates that the panel was an engaged and friendly group.

"The panel were really good, and all had something to say. They were very interactive with the speakers."

Facilitator Debrief, Wales & West Utilities team member

25 out of 27 participants completed Survey 1, feeding back on the design of the panel, and their experience of participating.

All 25 respondents would be interested in participating in future consumer panel events and activities, and 24 out of 25 were glad they took part. 22 out of 25 understand how the feedback from the panel was going to be used, and 23 out of 25 understood why the panel was taking place.

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The extent to which participants agreed with the following statements:

Legend: 1 - Strongly Agree, 2 - Agree, 3 - Disagree, 4 - Strongly Disagree, 5 - Don't know
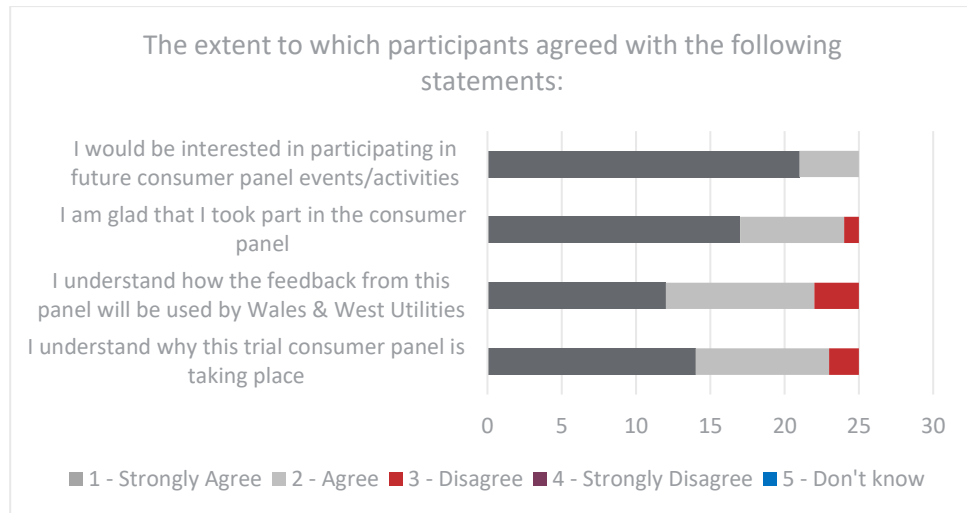
Figure 5

In polls at the end of both sessions, participants who completed the poll all either strongly agreed or agreed with the statement "I enjoyed taking part this evening".

The extent to which participants agreed with the following statements

Legend: 1 - Strongly Agree, 2 - Agree, 3 - Disagree, 4 - Strongly Disagree, 5 - Don't know
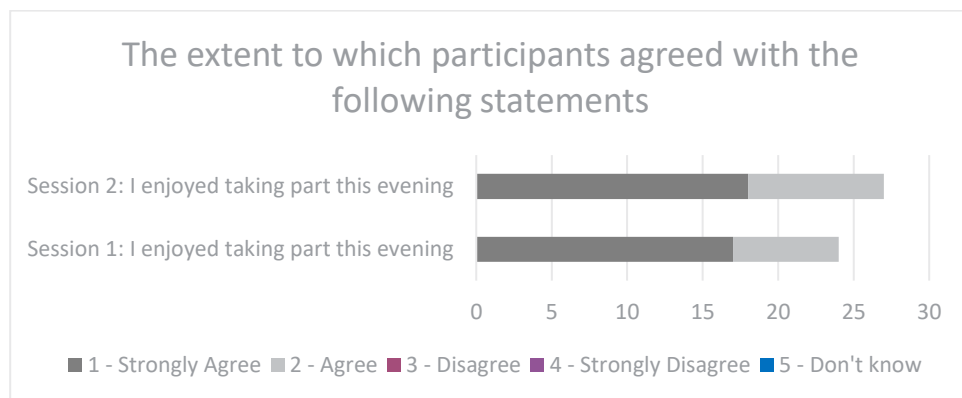
Figure 6

Based on this feedback, we can conclude that the overall participant engagement experience was very positive, and left people keen to continue participating in the consumer panel.

5.1.2 Information provision and supporting learning

As discussed in the methodology chapter, we designed the engagement to allow participants to build their knowledge cumulatively over the ten days, beginning with introducing Wales & West Utilities and their role in the wider energy system, to contextualise the more in-depth information about net zero and the decarbonisation of heat that came in the second half of the engagement.

It is clear from participant survey responses that most participants felt they learned something new about Wales & West Utilities and what they do, and about what the future holds for home heating and for the gas network.

"I also found it helpful to understand Wales and west utilities as I

didn't realise that they had a role in my local area."

"It was interesting to know what [Wales & West Utilities] does. And knowing that our ideas can be valued as customers."

"I enjoyed the experience and found out a lot of information about Net Zero and Wales & West Utilities"

"I'm always interested in learning new things, and it's been fascinating discovering about the changes that are afoot over the next 30 years."

These survey responses echo the sentiment of several participants who said in the Zoom chat after the first session that they found the sessions informative, or that they felt they had learned a lot from participating

"Panel member 1: I've learned loads from the last few sessions.

Panel member 2: I totally agree – I've learned loads from these panels.

Panel member 3: Me too"

We can see from survey responses that almost all participants found they were able to keep up with the presentations, and that the information provided was clear and accessible. However, one participant shared that they felt more time could have been taken on the presentations when asked about barriers to participating.
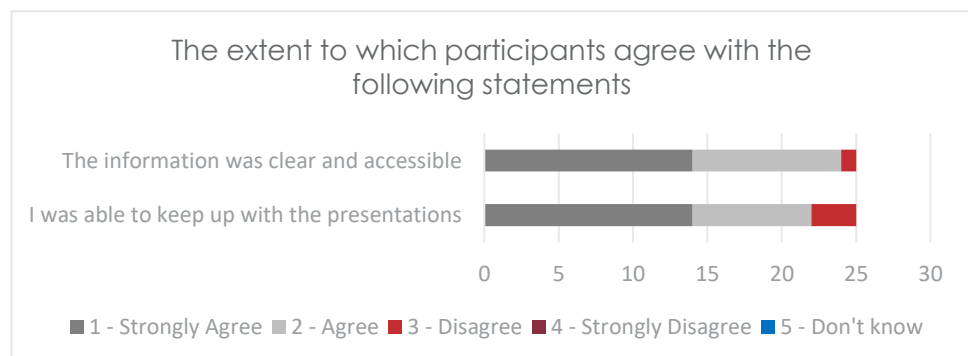
Figure 7

One participant reflected on the importance of visual aids for understanding new and complex information.

*"The videos… were great and really helped me understand things.
And visual aids – they're very helpful for me personally"*

Session 2, South Wales, Breakout Group Notes

Based on the participant feedback summarised here, we can conclude that the overall process - two live sessions and asynchronous online activities across a ten-day period, and the mix of activities within the sessions, works to support participant learning.

It is also worth noting that the focus of information provision in Session 1 was on *the role that Wales & West Utilities could play* in supporting the transition to net zero. The materials did not cover wider approaches to the decarbonisation of heat (where Wales & West Utilities would have less of a role to play) in as much detail, including the electrification of heat. Some participants showed an interest in wider decarbonisation topics like carbon capture. If Wales & West Utilities is keen to understand consumers' views on these wider approaches, they would need to be covered in the materials in the same level of depth, with speakers from other industries or utilities.

Key considerations for supporting information provision and learning

- Allow for both synchronous (live sessions) and asynchronous (online activities) learning and engagement

- Ensure materials are appropriate for a range of learning styles, including visual, auditory, and reflective learners.

- Consider bringing in outside speakers, to provide the consumer panel with a wider perspective or opportunity to shape 'whole-house' solutions, particularly on topics which affect multiple utilities.

5.1.3 Making the most of small group discussions

From a participant perspective, the small group discussions were where most of the benefits of participating were felt. Hearing from (and learning from) others was the most common benefit of participating that panel members mentioned. When asked, in Survey 1, what they had enjoyed most about participating in the trial panel, the most common response was around the format of the panel allowing them to hear from a diverse group of people and being exposed to views potentially different from their own.

"I enjoyed the engagements with others, especially in my local area with similar views and opinions but completely different backgrounds and potentially cultures."

Survey 1, Anonymous, Question 8

"It was easy to communicate with other people, and interesting to

hear different views that I may not have considered myself"

Survey 1, Anonymous, Question 8

This indicates the value of region-based breakout groups that provide the structure and space for participants to hear from one another.

When asked in Survey 1, about whether there was anything that made it difficult for them to participate, four participants mentioned the amount of time or the size of the group, with one participant suggesting smaller groups would have allowed for more in-depth conversation, and another suggesting more time or another meeting to provide more space to hear from one another.

"Smaller break out groups so you can have more in depth conversations"

Survey 1, Anonymous, Question 9

"More time could have been allocated to the group discussion to cover each topic in greater detail or another zoom meeting could have been arranged to obtain a better understanding of people's concerns/questions."

Survey 1, Anonymous, Question 11

This sentiment was echoed by facilitators and speakers, who reflected on how group size can limit the ease with which participants can contribute, as well as the time available for them to do so.

"Everyone participated but I do think a slightly smaller group would have helped contribute to a more flowing discussion giving participants slightly more opportunity to contribute."

Traverse facilitator reflection

In terms of making the most of the small group discussions to gather rich and useful insight to inform decision-making, there are two key considerations: having enough time for participants to process and reflect on new information, as well as time for the discussion itself; and the number of research questions and focus of the discussion prompts.

Timing of the sessions

We designed Session 1 with a focus on information provision and building participants' understanding, and as such, the bulk of discussion time was centred around Q&A. We designed Session 2 both to provide information to participants, but also to support reflection and discussion. However due to the relatively large size of each group, it wasn't possible for every participant to contribute to each discussion at length. For example, in a group with ten people, for each 15-minute slot within a breakout room, each person would have just 90 seconds to contribute to the discussion.

Research questions and discussion prompts

Whilst the content of discussions is explored in chapter 4, at a high level it is worth mentioning that there were multiple research questions, each of which framed a separate discussion within each regional group. Balancing the number of research questions with the amount of time available can support achieving the desired level of depth vs. breadth of discussion. In future, it could be worth earlier and closer involvement of topic specialists and the engagement team in developing the research questions, to ensure they link to decision making within the organisation, and to support the framing of discussions with participants.

Key considerations for making the most of small group discussions

- Region-based breakout groups with a broadly reflective, diverse group of people work to engage participants, and allow them to hear and learn from one another

- Work closely with Wales & West Utilities topic leads to develop research questions and related prompts in the facilitator discussion guide

- Ensure recap slides are available in breakout rooms to revisit key messages from any presentations if needed

- Make time for and support individual reflection within breakout rooms

- In advance of each meeting, speakers practice their presentations to ensure they can comfortably deliver within the timeframe

- General Q&A should be conducted in plenary, to avoid the same questions being asked and answered multiple times within breakout rooms

- Explore options for spreading the engagement over a greater number of sessions or extending the length of sessions with a greater emphasis on discussion.

- Explore options for reducing group size, to give each participant more time to speak, and to improve the flow of conversation. This could involve having a greater number of smaller groups.

5.1.4 Benefits and challenges of a digital approach

We delivered the panel online in response to the pandemic and restrictions on gathering in person. During the recruitment process, we screened for access to the internet and an appropriate device, to ensure that all participants would be able to engage on an equal footing. This means we were not seeking to engage with digitally excluded people. Having a parallel approach to engaging with digitally excluded individuals could be

considered for future engagements. The online nature of the panel did make it more inclusive in other ways, by opening up participation to people who may not have been able to travel or be away from home. For example, there was a mother who had her baby with her in one of the groups.

"The diversity of the group stood out, and the benefits of the of the digital set up. It allowed a mother to feed her baby on the call and still participate. It helps to hear the voices of people who may not have taken part on a Wednesday evening in person."

Traverse facilitator reflection

Of the 25 people who completed Survey 1, all said that they felt confident using both of the digital platforms that supported the panel – Recollective and Zoom.
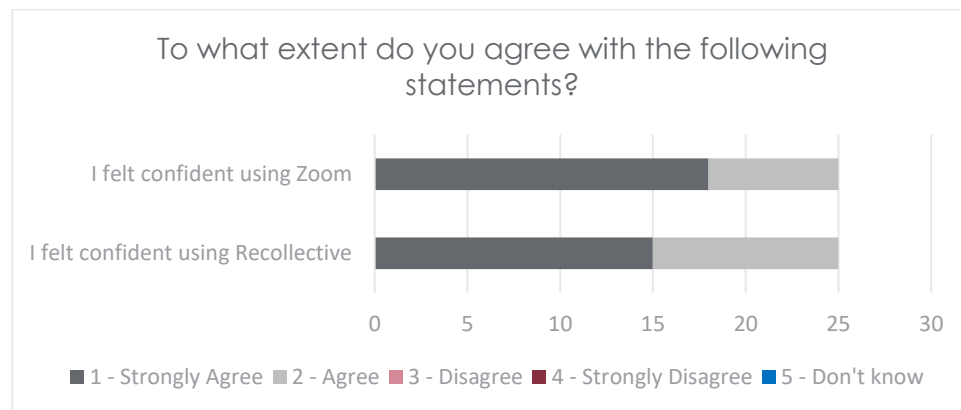
Figure 8

In the recruitment process, participants were asked if they would like any support from the team around the digital tools being used. None opted to receive this support. However, in response to the question *"was there anything that made it difficult for you to participate?",* five participants mentioned technological issues of some kind, ranging from one participant's microphone not working during the first session, through to the sound from some participants being lower quality than others. One participant failed to join Session 1 altogether due to challenges joining the Zoom meeting.

Facilitators reflected on how difficult it was to engage people who had their video off. For facilitators, it was clear that participants with their video on contributed more freely, where the facilitator had to actively call on participants without their video on to contribute. As we all know from personal experience of participating in online meetings, where participants can see one another, it is also easier for them to tell when someone has something to say, and to see how people are reacting to what they themselves are saying. Whilst it is not possible to attribute cause in a trial of this size, it seems likely that groups having a majority of participants with their video on is supportive of higher quality discussion.

"Some people are keen to turn their cameras off, and then it's harder to keep them in the conversation"

Facilitator debrief, Wales & West Utilities team member

Technical or connectivity issues which led to people cutting out or not being able to hear one another did interrupt the flow of conversation on occasion and limited the depth of engagement for some participants who were only able to contribute through the chat due to microphone issues.

Whilst the chat created another way of feeding into the conversations for those with tech issues, or who wanted to comment while others were talking, this comes with the associated challenge of participants needing to stay on top of what is being said as well as what is being written. One participant noted that they struggled to concentrate on the speaker's answers during a Q&A session, as questions were also being answered in the chat.

Key considerations for digital engagement

- Explore ways of encouraging / ensuring video for participation in the panel

- Explore options for supporting with technical issues in advance of the first session. This could include hosting an open drop-in session to troubleshoot problems or having a quick call with participants before the first event to ensure all participants understand where to find key features on zoom, and to test microphones and video.

- Explore the potential for a parallel approach to engage with digitally excluded individuals, if this is deemed a priority.

5.1.5 Scheduling live sessions

We planned for live sessions to take place on weekday evenings, so that they fell outside of normal working hours. From our experience working on a range of online engagement programmes since March 2020, members of the public have preferred weekday evening sessions to weekend sessions. This was confirmed in participant survey responses - when asked about the timing of the sessions in Survey 1, all participants said that weekday evenings were the most convenient for them.

Key considerations for scheduling live sessions

- Weekday evenings seem like the most desirable option from a participant perspective

5.2 Recruiting a diverse panel

Process objective	Data source/s
2. Understand whether we were able to recruit and onboard participants to meet the desired sample	• Comparing participant data with the desired sample

In this trial, we aimed to recruit a group of people from across Wales & West Utilities' three operating regions, and for each group to be broadly reflective of the regional adult population.

Due to the small group sizes, we boosted for certain characteristics to try and ensure there wasn't just one person from a specific age group, or from a BAME community.

We successfully recruited to the desired sample. See chapter 3.2 for a more detailed overview of our recruitment and sampling approach.

"It was the most diverse group I have spoken to which was really exciting."

Facilitator debrief, Wales & West Utilities team member

For this trial panel we over-recruited 29 participants, expecting between 24-29 to take part. 27 participants engaged with all aspects of the panel, while two participants dropped out.

Participants were incentivised to take part, with the possibility of earning up to £100 for attending both Zoom workshops, completing two sets of online Recollective activities, and completing two concluding surveys.

Key considerations for recruiting a diverse panel

- Allow for at least three weeks for recruitment, and over-recruit by around 10% to cover potential drop out

- £100 is sufficient to incentivise up to four hours of synchronous and asynchronous online engagement

5.3 Engaging younger participants

Process objective	Data source/s
3. Gauge whether the dynamics of the panel were affected by the inclusion of 16 – 18-year-olds	• Facilitator reflections after session 1 and 2

In this trial, we wanted to understand how the involvement of young people might impact the dynamics of the panel, to inform decisions about whether and how to involve young people in the main panel going forwards.

We recruited two 16-17-year olds to the South Wales group, so that they would not be the only ones in a particular group. We didn't provide any additional support to the young people in advance of the engagement.

Both young people attended Session 1 and Session 2 and completed all activities. Whilst both young people contributed to the discussion, this required additional prompting from the facilitator. It isn't clear whether this was due to their age, or some other factor. For example, both young people had their videos turned off, which may have had a greater impact on their level of participation than their age.

If this age group is going to be included in the panel going forwards, it would be worth exploring options to provide additional support to younger participants who aren't gas customers. This could involve having a conversation with each young person before the first session, to run through any questions and make sure they felt comfortable participating. It could also be worth reviewing prompt questions to ensure they are inclusive of all participants, or that there are prompts tailored for younger participants.

Other utilities companies have incorporated young people's perspectives through a separate youth forum. Depending on Wales & West Utilities' goals and priorities in relation to young people's views, next steps could include a review of best practice in youth engagement in the utilities or energy sector, and/or work to understand young people's engagement preferences, either through a survey to a wider set of 16-17-year-olds, or through engaging with stakeholders who represent youth audiences in their regions to make suggestions on behalf of young people.

Key considerations for engaging younger participants

- Explore options for additional support from the project team for younger participants

- Ensure the discussion prompts are relevant for younger participant who aren't yet gas customers

- Review best practice in youth engagement from across the sector

- Explore engagement preferences of young people through key organisations or stakeholders, or through a survey of young people in Wales & West Utilities regions.

5.4 Engaging Welsh speaking participants

Process objective	Data source/s
4. Understand whether offering materials in Welsh is sufficient to engage Welsh speakers	• Facilitator reflections after session 1 and 2 • Participant feedback via survey 1

Through this trial, we wanted to learn whether our provision around Welsh language was sufficient for Welsh speaking participants to engage in the process.

We offered versions of all materials in Welsh and had a Welsh-speaking facilitator for the North and Mid Wales group. We screened for whether or not people felt comfortable participating in English, to ensure all participants would be able to contribute on an equal footing. We therefore were not seeking to engage people who were not English-speaking.

None of the participants opted to receive materials in Welsh in advance. While the events were held in English the Welsh speaking facilitator in the North and Mid Wales group spoke in Welsh at various points to ensure complete understanding, build trust and boost engagement.

Two participants mentioned the Welsh language provision in their feedback. One mentioned that they would have enjoyed being able to participate in Welsh. Another participant mentioned that they appreciated how the Welsh speaking facilitator spoke in Welsh at various points. For the main panel, it might be worth considering a Welsh speaking group where people participate in Welsh. This could fit well in a model where there are a larger number of smaller groups. Going forwards, it could be worth seeking advice from the Welsh Government or other Welsh-language stakeholders on best practice.

Key considerations for engaging Welsh speaking participants

- Bring on Welsh-speaking facilitators for the North and Mid Wales and South Wales groups

- Consider whether a welsh-speaking group would be feasible /appropriate

- Seek advice from welsh-language stakeholders to advise on best practice

5.5 Topics for future engagement

Process objective	Data source/s
5. Gain insight into topics	• Participant feedback via survey 2

(relevant to a gas distribution network) that participants would like to engage on	

When asked to rank a set of three commitment areas in order of priority for the consumer panel to focus on over the next 12 months, 'supporting customers and looking after those most in need' was the highest ranked, followed by 'safe and reliable gas network' and finally 'preparing for the future.

As described on page 19 within chapter 4, participant comments in Survey 2 are consistent with findings from other public engagement Traverse has been involved with for energy networks, where the public has viewed safety as fundamentally important, but something that the networks should be delivering as standard rather than a priority to explore with consumers.

Key considerations for future engagement topics

- Consider the current participants' preferred option – 'supporting customers and looking after those most in need' – when selecting the topic for the next panel engagement

5.6 Key considerations for future engagement design

Improving participant engagement experience

Supporting information provision and learning

- Allow for both synchronous (live sessions) and asynchronous (online activities) learning and engagement

- Ensure materials are appropriate for a range of learning styles, including visual, auditory, and reflective learners.

Making the most of small group discussions

- Region-based breakout groups with a broadly reflective, diverse group of people work to engage participants, and allow them to hear and learn from one another

- Work closely with Wales & West Utilities topic leads to develop research questions and related prompts in the facilitator discussion guide

- Ensure recap slides are available in breakout rooms to revisit key messages from any presentations if needed

- Make time for and support individual reflection within breakout rooms

- In advance of each meeting, speakers practice their presentations to ensure they can comfortably deliver within the timeframe

- General Q&A could be conducted in plenary, to avoid the same questions being asked and answered multiple times within breakout rooms

- Explore options for spreading the engagement over a greater number of sessions or extending the length of sessions with a greater emphasis on discussion.

- Explore options for reducing group size, to give each participant more time to speak, and to improve the flow of conversation. This could involve having a greater number of smaller groups.

Digital engagement

- Explore ways of encouraging / ensuring video for participation in the panel

- Explore options for supporting with technical issues in advance of the first session. This could include hosting an open drop-in session to troubleshoot problems or having a quick call with participants before the first event to ensure all participants understand where to find key features on zoom, and to test microphones and video.

- Explore the potential for a parallel approach to engage with digitally excluded individuals, if this is deemed a priority.

Scheduling live sessions

- Weekday evenings seem like the most desirable option from a participant perspective

Recruiting participants to meet the desired sample

- Allow for at least three weeks for recruitment, and over-recruit by around 10% to cover

potential drop out

- £100 is sufficient to incentivise up to four hours of synchronous and asynchronous online engagement

Involving young people in the panel

- Explore options for additional support from the project team for younger participants
- Ensure the discussion prompts are relevant for younger participant who aren't yet gas customers
- Review best practice in youth engagement from across the sector
- Explore engagement preferences of young people through key organisations or stakeholders, or through a survey of young people in Wales & West Utilities regions.

Involving Welsh-speaking people in the panel

- Bring on Welsh-speaking facilitators for the North and Mid Wales and South Wales groups
- Consider whether a welsh-speaking group would be feasible /appropriate
- Seek advice from welsh-language stakeholders to advise on best practice

Topics for future engagement

- Consider the current participants' preferred option – 'supporting customers and looking after those most in need' – when selecting the topic for the next panel engagement

Restricted External
Final

Appendices

- Poll questions
- Survey questions
- Survey data
- Recruitment data
- Recollective Screenshots

Poll Questions

Poll 1:

To what extent do you agree or disagree with the following:

1) I understand why developing a consumer panel is important to Wales & West Utilities
2) I understand what Wales & West Utilities does
3) I enjoyed taking part this evening

Poll 2:

To what extent do you agree or disagree with the following:

1) I enjoyed taking part this evening
2) I understand the role Wales & West Utilities could play in achieving net zero
3) I understand how decarbonising heat might impact my life

Survey Questions and Closed Question Responses

Survey 1:

1) Which age range do you fall within?
   o Under 18 years old
   o 18-34 years old
   o 35-54 years old
   o 55-74 years old
   o 75+
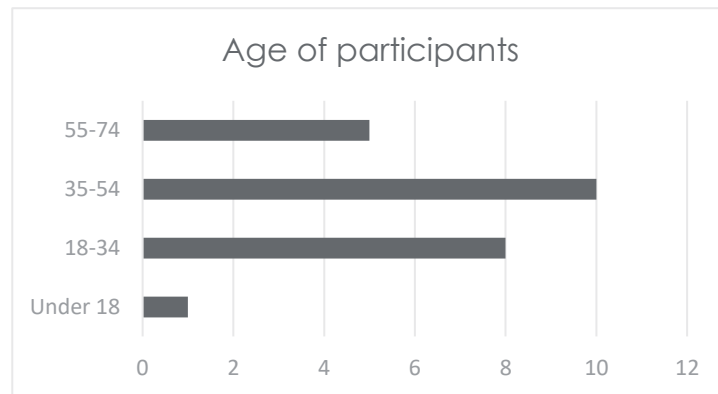
Responses:

2) For Welsh speakers, would you have preferred to speak Welsh during the events?
   o Yes
   o No

Responses:
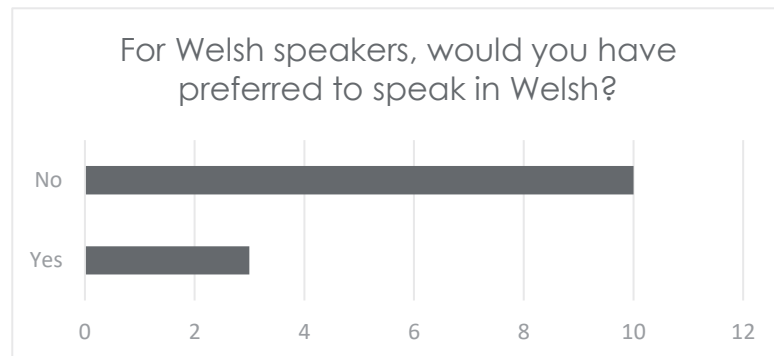
3) Please tell us to what extent you agree or disagree with the following statements about taking part in the panel workshops: [Options to all statements were strongly agree/agree/disagree/strongly disagree/don't know]
   o I had enough time to take in new information
   o There was enough time for the discussions
   o I found it easy to share my views

- o I felt comfortable asking questions
- o I was able to keep up with the presentations
- o My questions were answered well
- o The information was clear and accessible

Responses:

The extent to which participants agreed with the following statements:
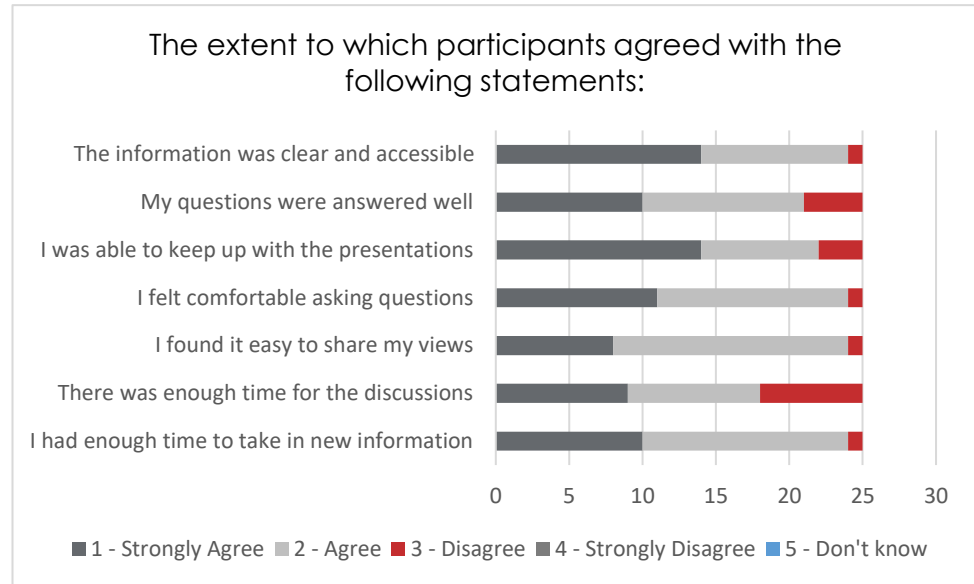
4) Please tell us to what extent you agree or disagree with the following statements about the technology and organisation of the consumer panel: [Options to all statements were strongly agree/agree/disagree/strongly disagree/don't know]
- o I felt confident using Recollective
- o I felt confident using Zoom
- o I found the timing of the sessions (weekday evening) convenient
- o The consumer panel was well organised

Responses:

The extent to which participants agreed with the following statements:
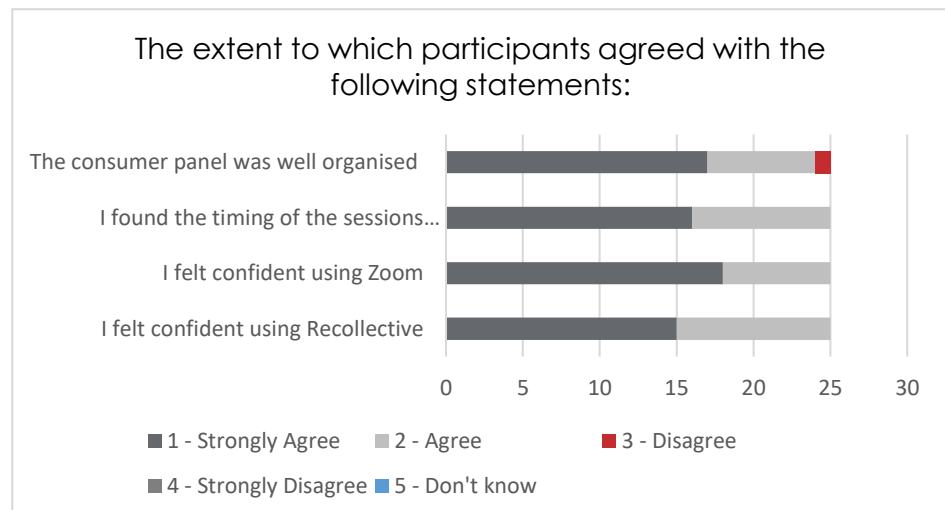
5) Please tell us to what extent you agree or disagree that the sessions and activities helped you to understand the following: [Options to all statements were strongly agree/agree/disagree/strongly disagree/don't know]
   o What Wales & West Utilities does
   o How Gas Distribution Networks can contribute to achieving Net Zero
   o How I as a gas customer may be affected by changes needed to reach Net Zero

Responses:

The extent to which participants feel they now understand the following:
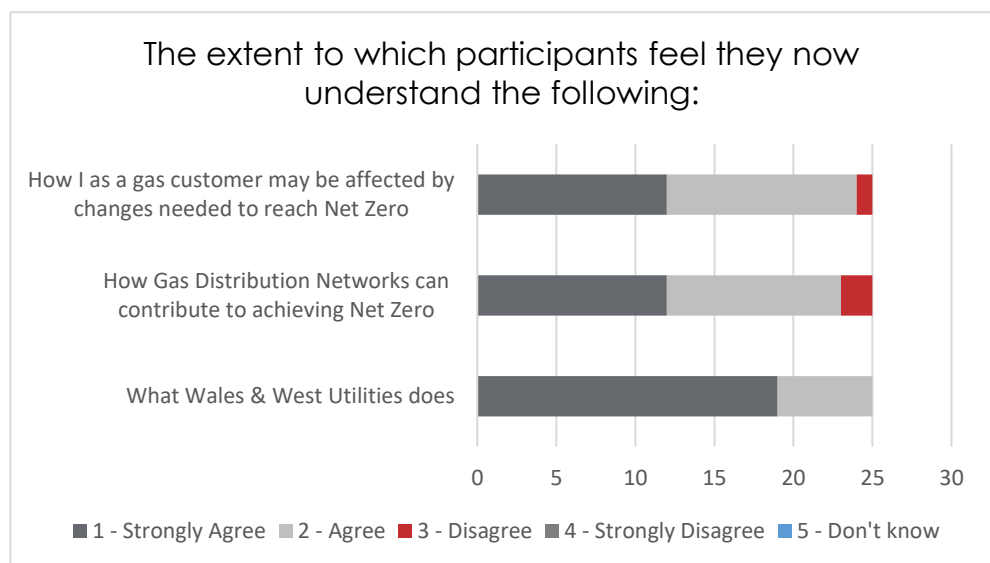
6) Please tell us to what extent you agree or disagree with the following statements about the purpose and overall experience: [Options to all statements were strongly agree/ agree/ disagree/ strongly disagree/ don't know]
   o I understand why this trial consumer panel is taking place
   o I understand how the feedback from this panel will be used by Wales & West Utilities
   o I am glad that I took part in the consumer panel
   o I would be interested in participating in future consumer panel events/activities

Responses:

The extent to which participants agreed with the following statements:
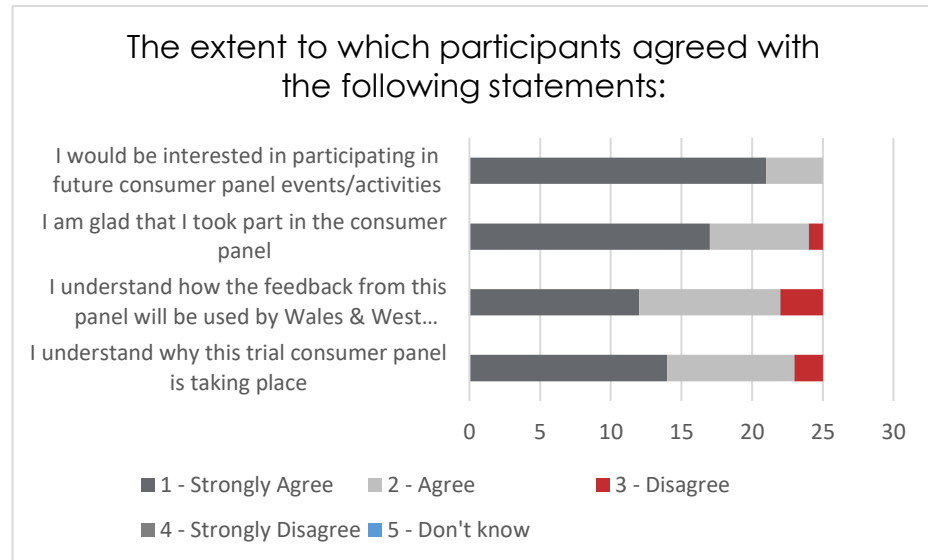
7) If you said you would be interested in participating in future consumer panel events or activities, when would it be convenient for you to take part? Select all that apply.
   o Weekday mornings
   o Weekday afternoons
   o Weekday evenings
   o Saturday mornings

Responses:

If you said you would be interested in participating in future consumer panel events or activities, when would be convenient for you to take part?
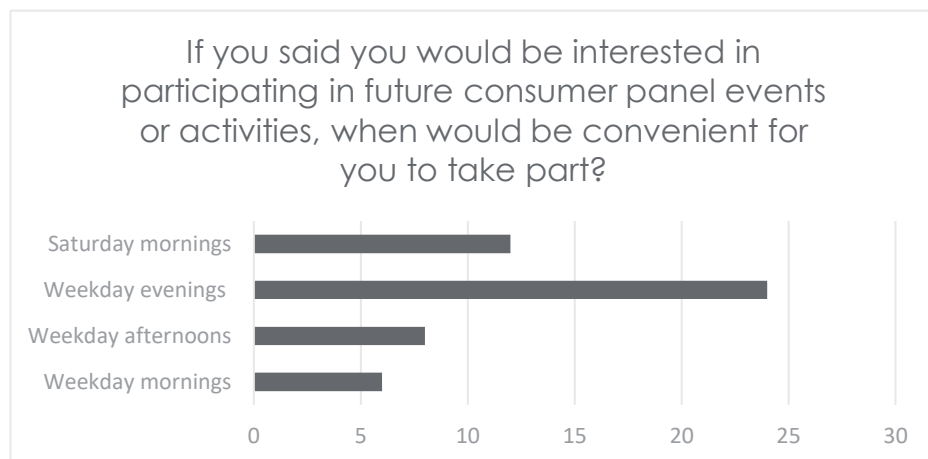
8) What did you like most about taking part in the panel? Were there any activities that you found particularly interesting or rewarding?

Responses: [OPEN ENDED]

9) Was there anything that made it difficult for you to participate in the panel? What could have improved your experience of taking part?

Responses: [OPEN ENDED]

10) If you said you would not be interested in taking part in future events or activities, please tell us why.

Responses: [OPEN ENDED]

11) Do you have any other suggestions, comments or questions?

Responses: [OPEN ENDED]

Survey 2:

About Wales & West Utilities and their 2021-2026 commitments:

1) In session 1 you heard about the three service areas Wales & West Utilities is focusing on in 2021-2026. Please place these in order of which you think should be their priority, with 1 being highest and 3 the lowest:
   o Safe and reliable gas network
   o Supporting customers and looking after those most in need
   o Preparing for the future
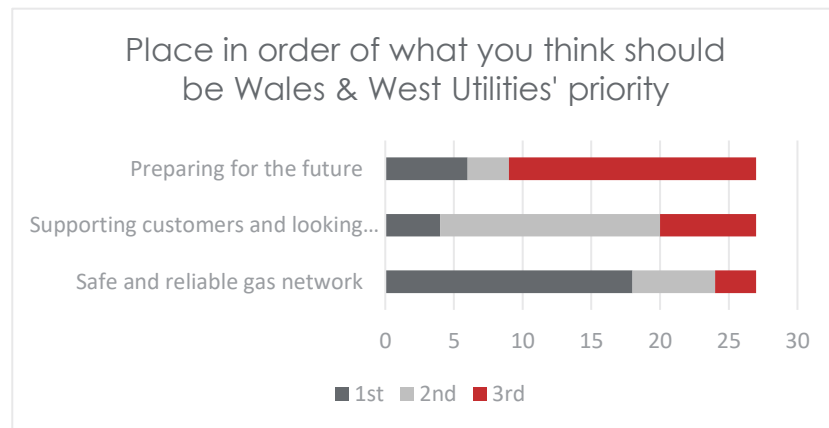
Responses:

2) Why did you place them in this order?

Responses: [OPEN ENDED]

3) Which of these areas do you think the consumer panel should prioritise in the next 12 months? Please rank the 3 in the order you think they should be discussed, with 1 being first.
   o Safe and reliable gas network
   o Supporting customers and looking after those most in need
   o Preparing for the future

Responses:

Place in order of what you think should be the consumer panel's priority over the next 12 months
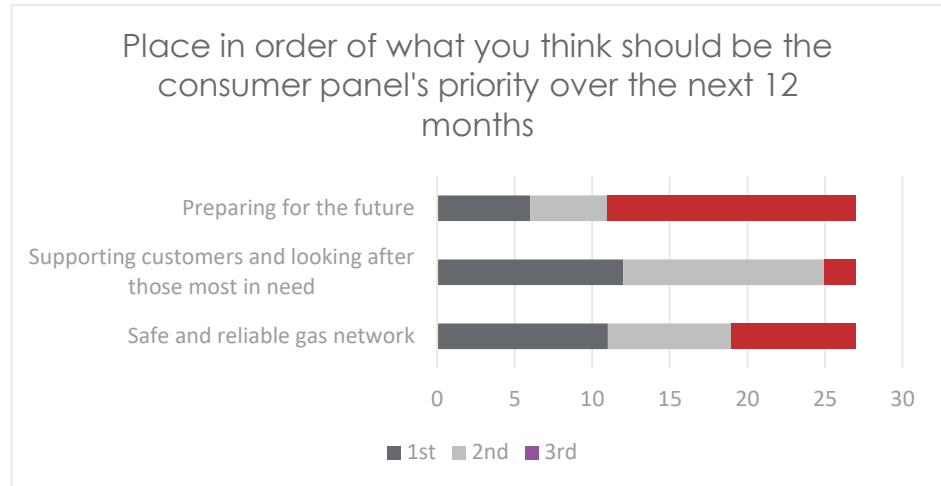
4) Do you have any other comments or suggestions about topics related to gas distribution that the consumer panel should explore and discuss?

Responses: [OPEN ENDED]

About net zero and the decarbonisation of heat:
5) How important do you think the following options are in achieving the decarbonisation of heat in UK homes? [Options to all statements were very important/important/not very important/not at all important/don't know]
   o Getting a smart meter
   o Insulating my home
   o Having my heating on less
   o Using less hot water
   o Getting a lower-carbon boiler or heating system
   o Changing my cooking appliances

Responses:

How important do you think the following are in achieving the decarbonisation of heat in UK homes?

6) What sorts of changes would you be willing to make to help decarbonise your home heating (heating, hot water, cooking) in the next 3-10 years? [Options to all statements were I have already done this/I am likely to do this/ I am not likely to do this/ don't know]
   - Getting a smart meter
   - Insulating my home
   - Changing to an electric heating system e.g. air source heat pump
   - Changing from a natural gas to a hydrogen or biomethane heating system
   - Changing to a hybrid heating system which can use hydrogen/biomethane gas and electricity
   - Changing my cooking appliances
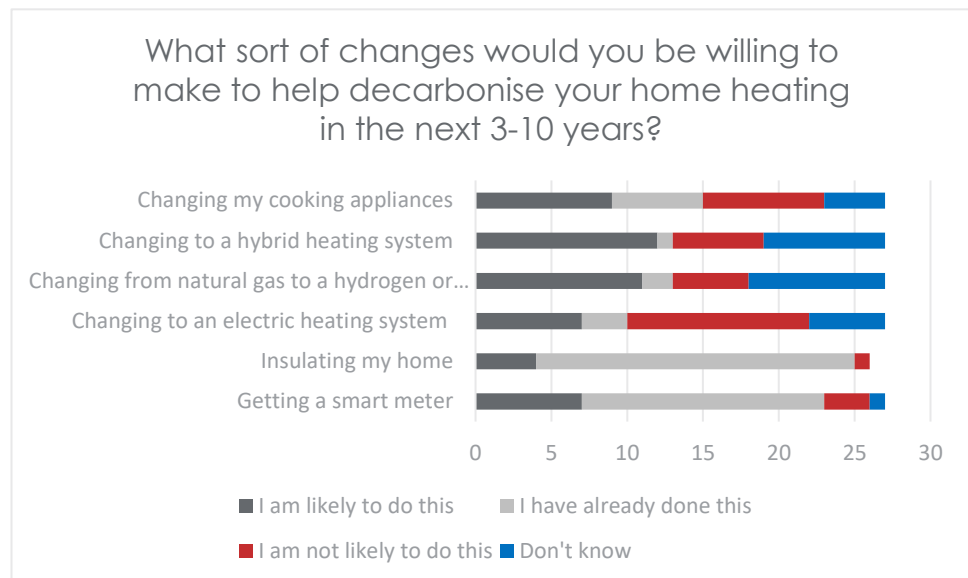
Responses:

7) What do you think the main benefits of future 'greener' low carbon heating systems would be?

Responses: [OPEN ENDED]

8) What would your main concerns about future 'greener' low carbon heating systems be?

Responses: [OPEN ENDED]

9) Which of the following factors would most influence your decision when choosing a 'greener' lower carbon heating system in the future? Please select up to 3.
   - Disruption associated with installation
   - Look and size of the unit

- o Installation costs
- o Running costs
- o Noise
- o Safety
- o Comfort (able to control temperature levels)
- o Reliability
- o Less environmental impact
- o Smart controls (on an App or your phone)
- o Whether I need to change cooking appliances
- o Whether I need to change radiators
- o Other – please specify

Responses:

Which of the following factors would most influence your decision when choosing a greener lower carbon heating system in the future?
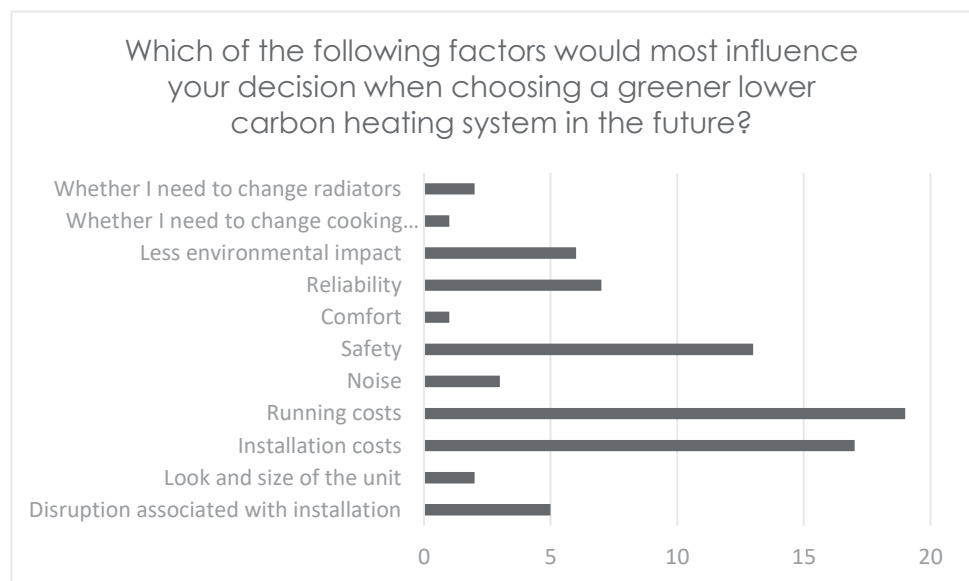
10) Please comment on your answer to the previous question. Why do you say these are the most important factors?

Responses: [OPEN ENDED]

11) Imagine you needed to change your heating system tomorrow (this includes, hot water, cooking and heating). Who would you currently get advice from about 'greener', lower carbon options? Please select up to three that apply or select other and specify.
- o Energy supplier
- o Heating supplier
- o National government
- o Plumber
- o Green safe registered engineer
- o Local council
- o Specialists energy advice
- o Gas distribution network (e.g. Wales & West Utilities)

- o Don't know
- o Other – please specify

Responses:

Who would you currently get advice from about greener, lower carbon options?
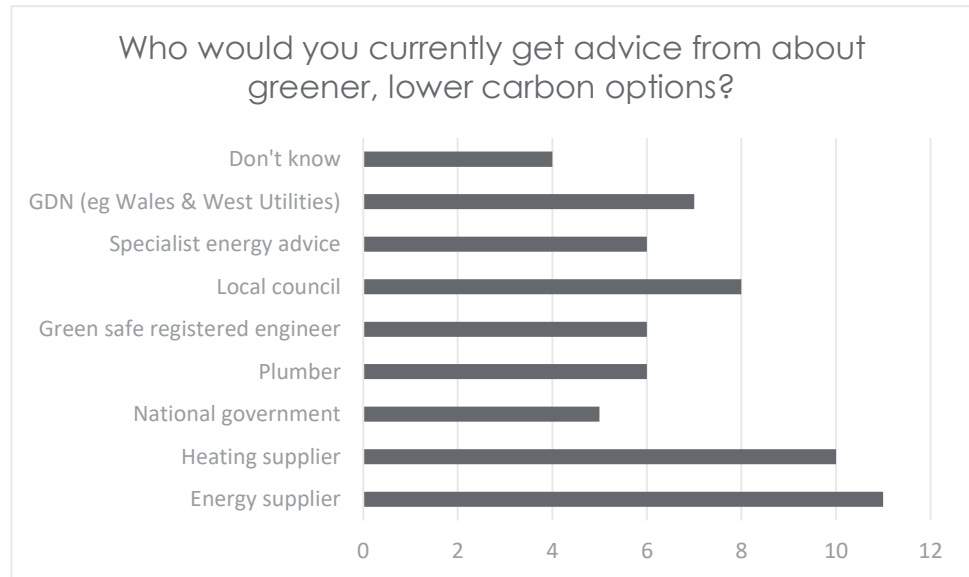
12) Imagine you needed to change your heating system in 3 years' time (this includes hot water, cooking and heating). Who would you like to be able to get advice from in the future about 'greener', lower carbon options? Please select up to 3 that apply or select other and specify.
- o Energy supplier
- o Heating supplier
- o National government
- o Plumber
- o Green safe registered engineer
- o Local council
- o Specialist energy advice
- o Gas distribution network (e.g. Wales & West Utilities)
- o Don't know
- o Other- please specify

Responses:

Who would you get advice from in 3 years time about greener, lower carbon options?
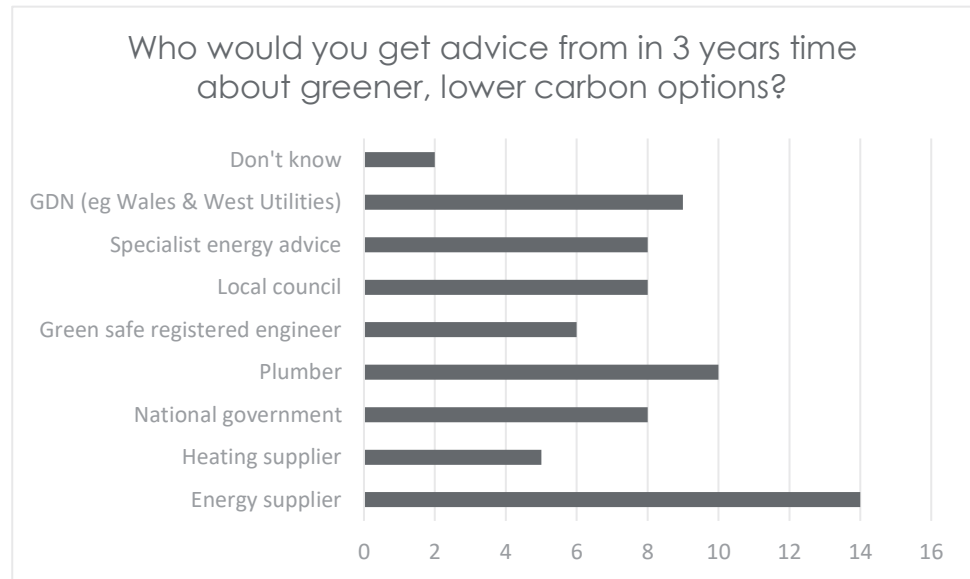
13) Should Wales & West Utilities be helping customers to decarbonise their home heating? If yes, what should they be doing? If no, why not?

Responses: [OPEN ENDED]

Recruitment data

Long-term health problem or disability (n=29)

Day-to-day activities limited a lot
Day-to-day activities limited a little
Day-to-day activities not limited

0   5   10

■ North-Mid Wales   ■ South Wales   ■ Southwest England

Urban/Rural (n=29)

Southwest England
South Wales
North-Mid Wales

0   2   4   6   8   10   12

■ Urban   ■ Rural

Gender (n=29)

Male
Female
Rather not say
Other

0   5   10   15   20

■ North-Mid Wales   ■ South Wales   ■ Southwest England

Ethnicity (n=29)

Asian/Asian British
Black British/Black African
White

0   5   10   15   20   25

■ North-Mid Wales   ■ South Wales   ■ Southwest England

Age (n=29)

| | North-Mid Wales | South Wales | Southwest England |

Socioeconomic Group (n=29)

| | North-Mid Wales | South Wales | Southwest England |

Restricted External
Final

Recollective Screenshots