



Energy Diaries 2025 – Voices of small organisations

Exploring the energy needs of small organisations and charities

Full report
September 2025

Thinks
— Insight & Strategy —

Cadent
Your Gas Network

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Executive summary





Background

CADENT'S MESSAGE

As the UK's largest gas distribution network and a provider of a critical service to over 11 million properties in the UK, Cadent is responsible for keeping people safe, warm, and independent in their homes and organisations.

Cadent does this with a keen eye to the future: decarbonising its business, while investing in green alternatives to fossil gas to help fuel the UK for generations to come.

RESEARCH OBJECTIVES

As part of its ongoing work to help customers work towards a sustainable future, Cadent has commissioned Thinks Insight & Strategy to conduct research on the topics of energy and sustainability, with a focus on small and medium sized businesses and charitable organisations.

The core research question is as follows: **In the context of the cost-of-living crisis and environmental pressures, how are small charities and SMEs thinking about how they might use and interact with energy in the future?**

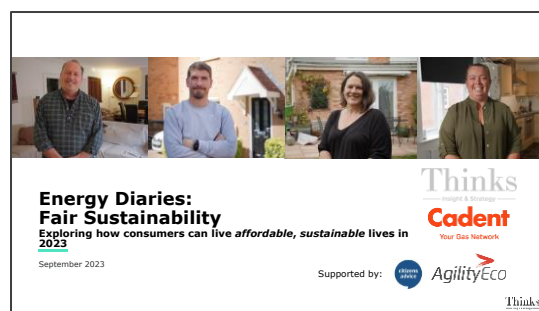
This is the fourth iteration of the Energy Diaries research

Since 2022, Cadent and Thinks Insight & Strategy have conducted annual research with customers to understand key issues relating to energy usage, behaviours, sustainability and the cost-of-living crisis. This piece of work is the next iteration, now focusing on small organisations (SMEs and charities).

Energy Diaries 2022



Energy Diaries – Fair Sustainability 2023



Energy Diaries – Voices of the future 2024



Energy Diaries – Voices of small organisations 2025



Definition of small organisations

- Throughout this report, '**small organisations**' is used as a collective term that refers to both small and **medium-sized enterprises** (SMEs) and **charitable organisations**.
- Where findings or insights are specific to either SMEs or charities, this will be clearly indicated throughout – **using distinct icons** (see right).
- This approach allows us to address **common themes** across small organisations, while also acknowledging the **unique contexts** and **needs of each group** where relevant.



SMEs will be represented using the corresponding icon



Charities will be represented using the corresponding icon



Consumer tracking responses will be represented using the corresponding icon

Our research included qualitative and quantitative components

METHODOLOGY

Phase 1: Qualitative in- depth interviews	Phase 2: Co- creation expert workshop	Phase 3: Initiative testing	Quantitative survey	Consumer tracking survey
28 th Feb – 14 th March	29 th April	6 th June – 16 th June	4 th June – 18 th June	Early September
In-depth interviews were conducted with 12 SMEs and 8 charity organisations, each preceded by a short pre-task to explore organisation context and energy behaviour. The findings were later presented during the co-creation session.	A session was held with a range of experts in sustainability, energy, and behaviour change, to brainstorm possible ideas and interventions, in light of the qualitative findings.	A follow-up online task with 7 SMEs and 4 charities built on the findings from phases 1 and 2, inviting participants (who took part in phase 1) to provide feedback on the initiatives generated in the co-creation session.	A survey with 400 SMEs and 150 charities to quantify the issues raised in the qualitative phases.	A tracking survey with 2000 domestic consumers to explore how key issues have changed over time

We heard from 12 SMEs and 8 charity organisations as part of the qualitative process



General criteria	Sample weighting
Type	3 x retail and hospitality 3 x manufacturing 2 x construction 2 x real estate
Size	4 x micro (1-9 employees) 4 x small (10-50 employees) 4 x medium (51-250 employees)
Location	3 x Northwest 3 x West Midlands 4 x East of England 3 x North London



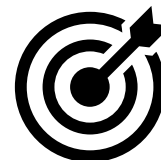
Importance of energy

All use mains gas and electric with a range of heating systems, including smart and A/C. They agree energy is essential for operations and would be unable to operate or only run at limited capacity if supply is cut. The majority struggle to pay energy bills in the last 6-12 months.



Importance of sustainability

Most see sustainability as important, but prioritising this creates a tension for most SMEs and charities due to multiple competing pressures.



Importance of Net Zero

Mixed levels of understanding and importance placed on Net Zero – SMEs show stronger understanding and view it as more important, while most charities have limited understanding and more mixed views on importance.



General criteria	Sample weighting
Type	3 x community support 1 x health & wellbeing 2 x employment support 2 x children and animal support
Size	All relatively small, with of max 250 employees
Location	1 x Northwest 1 x West Midlands 5 x East of England 1 x North London

And consulted with four industry experts in a co-creation workshop

International Customer Experience Manager



Co-founder



Head of Policy



Research Manager



Key questions

How are small organisations thinking about how they might use and interact with energy in the future? What can gas networks can do about it?

1

Understanding
running a small
organisation
today

What are the unique pressures being faced by SMEs and charities today, and how does this shape how they think about the future?

2

Energy
behaviours

How do small organisations engage with/think about energy today? What are their day-to-day energy behaviours, and how do they reflect on these behaviours? How do they think they will interact with energy in the future?

3

Engagement with
sustainability

How relevant is living sustainably for running a small organisation right now? What are the motivators and barriers to making small organisations more sustainable?

4

Heating

How engaged are small organisations on the topic of heating in relation to energy usage and sustainable energy behaviours? What specific outlooks and needs do they have in relation to heating?

5

Supporting small
organisations

What support and advice do small organisations need to help them thrive in the current climate, with respect to energy?

Key insights

1	2	3	4	5
Understanding running a small organisation today	Energy behaviours	Engagement with sustainability	Heating	Supporting small organisations
Small organisations feel they are facing a unique set of challenges, which are exacerbated by the cost-of-living crisis. SMEs are grappling with rising costs across their business and charities are trying to help more people, with less resources. These pressures are particularly pronounced for the smallest organisations.	Concerns about rising costs (of which energy is one) is driving small organisations to reduce their energy usage and cut costs wherever possible. Some SMEs are passing costs onto customers and charities are struggling to maintain their essential services. They would like Government and energy providers to provide tailored support for small organisations.	Sustainability is important to most small organisations; they are taking steps where possible to implement sustainable behaviours. However, competing demands and limited resources leaves little room for future thinking and restricts small organisations' ability to make bigger investments in sustainability that would save money and energy in the long term.	Heating is vital for many to maintain a warm, comfortable environment for staff, customers and service users. It is seen as very difficult to reduce, without compromising on the organisation's success.	Small organisations feel government and energy companies have a responsibility to support them and help fund sustainability changes, as they are providing essential services and economic support to local areas. Financial support and education are seen as key ways to help.

Key insights: supporting data

1

Understanding running a small organisation today

52% of charities and 39% of SMEs are anxious they'll be operating in 5 years. Only **22%** of micro businesses feel their organisation is thriving (compared to 53% of medium businesses), with a 46% passing costs onto customers. **55%** of charities say a reduction in donations is making it challenging to cover energy costs and **41%** are reducing or changing the service they offer.

2

Energy behaviours

Financial concerns create a tension between remaining viable and maintaining a service. **76% of charities and 67% of SMEs** are looking to reduce their energy usage, with **64% of charities and 53% of SMEs** cutting costs elsewhere. Even with this, **57% of charities and 42% of SMEs** say the increase in bills is negatively impacting the service they offer to customers/users.

3

Engagement with sustainability

Affordability takes priority over sustainability, making it difficult for the smallest organisations. Only 31% say sustainability is not a priority, with 73% of charities and 55% of SMEs saying they are making improvements to be more energy efficient. However, this drops to 63% for local charities and 41% for micro businesses.

4

Heating

60% of charities and 50% of SMEs are worried that heating has become a luxury for some organisations. However, the majority (75% of charities and 55% of SMEs) say the comfort of staff and customers is key to their business model and 37% of charities and 55% of SMEs would not be able to operate without gas.

5

Supporting small organisations

When shown examples of what Cadent is doing (or could do) to support small organisations to manage their energy costs and be more sustainable, examples which stood out as meaningful ways for Cadent to support were **hints and tips** (to provide tailored support to small organisations), **the Greener Society** (reducing emissions to help wider society and providing greener gas to help organisations reach sustainability goals) and **the Cadent Foundation**. Engaging in charity work is seen to have a dual benefit: the morally right thing to do, alongside enhancing brand image.

Our small organisations represented SMEs and charities across a range of sectors

Meet our small organisations...



Pushpa



Emily



Arun





Pushpa, Salon owner

Pushpa owns a beauty salon for nearly 10 years, and she sees her business as more of a **'retreat'**—a place where clients not only get a great service, but can **relax in a calming, warm atmosphere**. As a result, she is **highly dependent** on gas to maintain the warm, welcoming environment.

"We [would] not be able to live without heating... We have built this ambiance [around] relaxation. [We] are very dependent on energy."

However, with the recent increase in her premises' size, a growing number of staff, and more demand for services, **energy prices have become a significant concern**. Pushpa has found there's little room to reduce her gas usage without compromising the experience she provides. She has tried to cut costs in other areas, such as scaling back on some of her overseas product orders, but when it comes to client satisfaction, **heating is one aspect she's unwilling to sacrifice**.

"Everything [is] going up and not going down. That is very challenging. I don't know how we'd survive [in the future]. The word I would use for the future is 'bleak'... Now is the time to start thinking if we can challenge or overcome [the energy prices]. We can [try], but what are we going to do differently?"

To manage the rising energy costs, Pushpa has actively sought deals with her energy provider. Unfortunately, this has proven challenging due to the **high business tariffs**. She believes the government should play a proactive role in helping SMEs. **The uncertainty in energy costs is causing significant anxiety among small business owners like herself.**



Privately
rented
premises



Heating is
essential
for operations



Severely
impacted
by rising
energy costs



Not
confident
about future
challenges



Very
proactive
in seeking
support



Emily, Charity manager

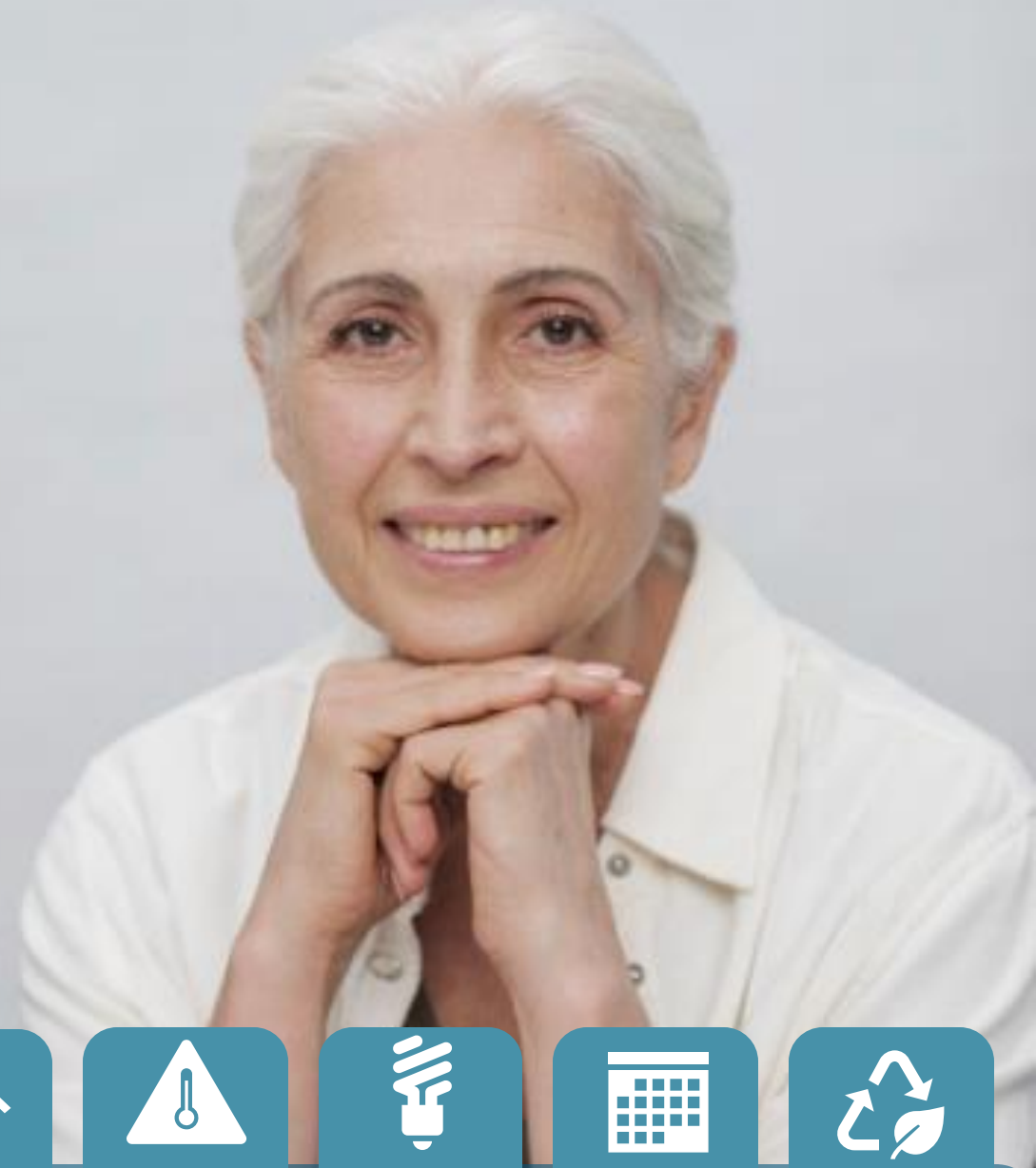
Emily manages a community-focused charity that incorporates a local shop, food bank, and a range of support services for the local area. Through initiatives like coffee mornings, lunch clubs, and practical support for food poverty, Emily plays a central role in creating a **welcoming, supportive environment for those in need.**

"We offer safe space [as] where we live is one of the poorest places in the UK. We [also] offer a warm place for people to come in and have a chat."

Recently, the sharp increase in energy prices has become a source of concern. As a designated '**warm space**', Emily's organisation offers a **vital refuge** where people can **come to keep warm during colder months**—something that has become **increasingly essential** as more individuals struggle to afford basic utilities at home. As a result, heating is not something they can reduce or compromise on, despite the rising costs.

"I think in the early days of this economic climate, it was a choice between heating and eating, and now there isn't any choice. Some people have no food and no heating, and some people have gone days without heating. When they come to us for a full parcel, they ask for things that they can eat cold because they can't afford to use the cooker."

This places growing pressure on both the charity and Emily herself. With more people affected by the cost-of-living crisis, demand for the charity's services is rising. The increased demand, paired with limited resources, is forcing Emily to make **difficult decisions about where to cut back**—scaling down some services in order to keep the most critical support, like heating, running.



Rent free
charity
premises



Heating is
essential
for operations



Severely
impacted
by rising
energy costs



Not
confident
about future
challenges



Moderately
proactive
in seeking
support



Arun, Business director

Arun is the director of a mid-sized apparel business that focuses on providing quality clothing to consumers. He's acutely aware of how fluctuating **energy costs** have a **significant impact** on the company's bottom line. Over the years, the balance between **profit and expense** has become **more challenging**, especially as energy prices continue to rise alongside product costs.

"In all honesty, the high energy costs [is] crippling... [and] that's going to have a detrimental effect on our production costs."

Heating is crucial for the business, particularly for customer comfort and employee satisfaction. However, maintaining a comfortable environment means dealing with high energy costs, which have become a major concern. To stay on top of these fluctuating prices, Arun **actively monitors and reviews the business's energy usage, seeking the most cost-effective suppliers to find better deals and more stable pricing.**

"I expect [both] the government and energy providers to provide more support... just [to] work with local businesses, tailor the offerings for them and keeping them informed of any potential changes in gas prices, so that the costs are mitigated for the local businesses."

Despite these efforts, Arun feels that **both the government and energy providers often fall short in offering meaningful support to SMEs like his.** Arun believes that practical, accessible support could be provided, such as hosting webinars for SMEs on how to optimise energy use. He's hopeful that both the government and energy providers can find ways to collaborate more effectively with businesses like his to promote long-term cost savings and a more sustainable future.



Owned
premises



**Heating is
essential**
for operations



**Generally
impacted**
by rising
energy costs



**Somewhat
confident**
about future
challenges



**Very
proactive**
in seeking
support

Understanding running a small organisation today



Small organisations are facing a unique set of challenges – SMEs are grappling with rising costs and charities are trying to help more people with less resource

The high energy costs are crippling because obviously there's a lot of competition from abroad. We still manufacture in the UK, but we source a lot of materials from overseas, with the potential threat of tariffs being posed by America. That's going to have a detrimental effect on our production costs and ultimately our profit margin. Water has gone up from April and council tax and business rates have gone up too. Everything has gone up for normal households and businesses.

-SME

A large proportion of small organisations are **unsure** about their long-term future



52%

Of **charities** agree with the statement 'I am anxious about whether our organisation will still be operating in the next 5 years'

This rises to 64% for those who say electricity costs are having one of the biggest impacts on them



There is widespread concern that more and more charities will fold in the future due to rising costs. Charities are aiming to not have to make redundancies, continue to access funding and be able to keep supporting their service users.

Charities are trying to maintain the standard of service they currently offer, rather than looking to expand.



39%

Of **SMEs** agree with the statement 'I am anxious about whether our organisation will still be operating in the next 5 years'

This rises to 54% for those who say electricity costs are having one of the biggest impacts on them

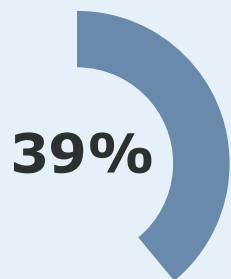


SMEs are continually trying to find ways to remain agile and efficient in a world of continually rising costs. Most are aiming to grow, although only a few are optimistic about this aim.

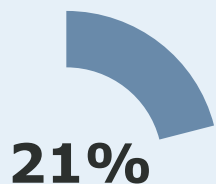
As well as rising energy costs, SMEs are facing increased costs across their supply chain, cost of staff, maintaining buildings, inflation and impacts of climate change.

Due to the current market unpredictability, small organisations are hesitant to be tied into long-term contracts with energy (and other) suppliers.

Financial and competitive challenges are felt strongly. Most SMEs are struggling to cope with the **rising costs** of running a business



of SMEs agree with the statement 'my organisation is thriving at the moment'



of SMEs agree with the statement 'if the heating broke, the organisation would not be able to afford to fix/replace it'

Running a small business is particularly challenging in 2025 for a number of reasons, including:

- **Increased costs** (e.g. suppliers, contractors, staff, energy bills, NI). There is a resentment that SMEs are paying more for exactly the same services and products as before. They describe trying to get the best deals they can negotiating with their own suppliers to keep costs down, but this is difficult as source materials are more expensive.
- **The Cost of Living crisis** reducing customer spending.
- **Being undercut by competitors** but unsure how they can cut their costs.
- **Limited cashflow.** If customers or clients don't pay on time, small businesses often do not have the cash reserves to cover their costs.

"Prices [are] being very competitive, [and] cost of living affects us too. I have to pay my workers, [but] also my bills, and draw a salary out for myself."

-SME

"We just got our heads above water, but it's just touching our chin... you got to eat, [and] my work family has to put food on their tables."

-SME

Q17: How far do you agree with the following statements? Base size: all SMEs (n=400)

Charities are facing pressure on three fronts: greater need, reduced donations and rising costs



53%

of charities agree with the statement 'my organisation is thriving at the moment'

55%

of charities agree with the statement 'reductions in donations from the public is making it challenging for charities to cover energy costs'

"We're seeing more and more people choosing between eating or heating. They can't have both, so they come to us to be warm."

-Charity

- **Greater need:** charities are supporting an increasing number of people, as the cost-of-living crisis pushes more people into difficulty. They are trying to do more, with less resource (e.g. offer more food banks, cover transport costs, provide warm water and charge devices).
- **Reduced donations:** charities note fewer donations from the public (e.g. money and food bank donations), fewer grants and more competition for the grants available. All of which are having a significant impact on charities' income.
- **Rising costs:** the cost of providing their service has increased – particularly heating and hot food. This is essential to many charities who provide 'warm hubs' and other community services and these costs are becoming a burden.

In 2020 we couldn't get toilet roll, and in 2025, we can't afford it. That's how much everything has gone up. It is extremely challenging now. It has always been challenging, but the pace is much more difficult. It was down to Covid now it's the Russian/Ukraine war.

-SME

For many, these pressures are perceived to be growing as the cost-of-living crisis continues

These pressures are seen to have noticeably increased in the years since the pandemic, and the cost of living and energy crises began.



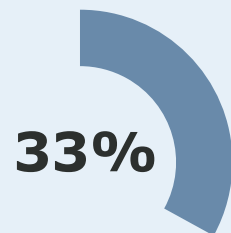
Some SMEs also note having to reduce staff due to the impact of the Covid-19 pandemic on their sectors.

The extent to which these pressures are felt is greatest for the smallest organisations

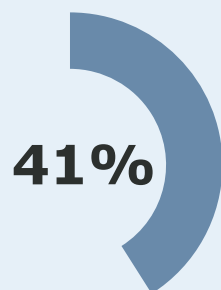
"My business /organisation is thriving at the moment"	SMEs 	Micro 22%	Small 36%	Medium 53%	Overall 39%
	Charities 	Local 33%	Regional 56%	National 57%	Overall 53%

The sentiment that current pressures, in particular rising energy costs, is being felt most strongly by micro and small organisations is echoed by the experts.

Q17: How far do you agree with the following statements? Base size: All SMEs (n=400); micro (n=102); small (n=132); medium (n=166). Base: All charities (n=150); local (n=24); regional (n=66); national (n=60)

33%

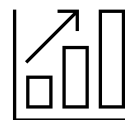
of SMEs say they are 'reducing the number of staff in the organisation or pausing hiring of new staff'

41%

of charities say they are 'reducing or changing the service the charity offers to its users'

Q16: Which, if any, of the following actions are you currently doing in response to the increased pressure of rising costs? Base size: all SMEs (n=400); all charities (n=150)

Increased costs are having a detrimental impact on staff and services



Some SMEs have had to reduce staff hours (e.g. opening on fewer days of the week), or have not been able to increase salaries for their staff in a long time. This has led to low morale and retention challenges. In many cases, managers indicate that salary increases are simply not plausible due to ongoing financial constraints.



As cost of living rises, more people are seeking assistance from charities, which is **placing additional pressure on services provided** (food banks, warm spaces, etc.). Charities are **struggling to balance** increased demand with limited resources, and some report feeling there is little room to cut costs. In order to **maintain their core services, some charities have been forced to cut back on supplementary services**, such as events, days out, and coffee mornings, in order to focus on providing the basics.

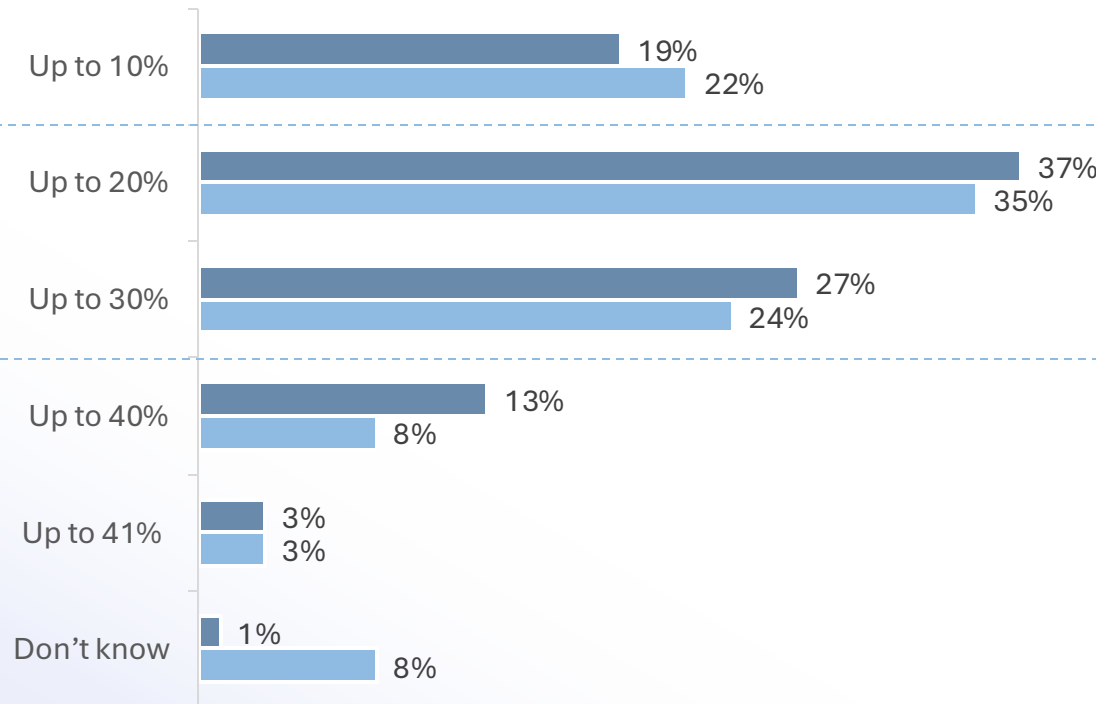
Experts recognise the intense pressure both sectors are under due to rising energy costs

- Experts are in agreement that small organisations are very vulnerable in the current financial context, in particular those that are 'energy-reliant', where energy expenditure constitutes a significant portion of turnover.
- They argue that a key reason for this difficulty is that small organisations are forced to focus on short-term endurance rather than long-term strategic planning around energy use.

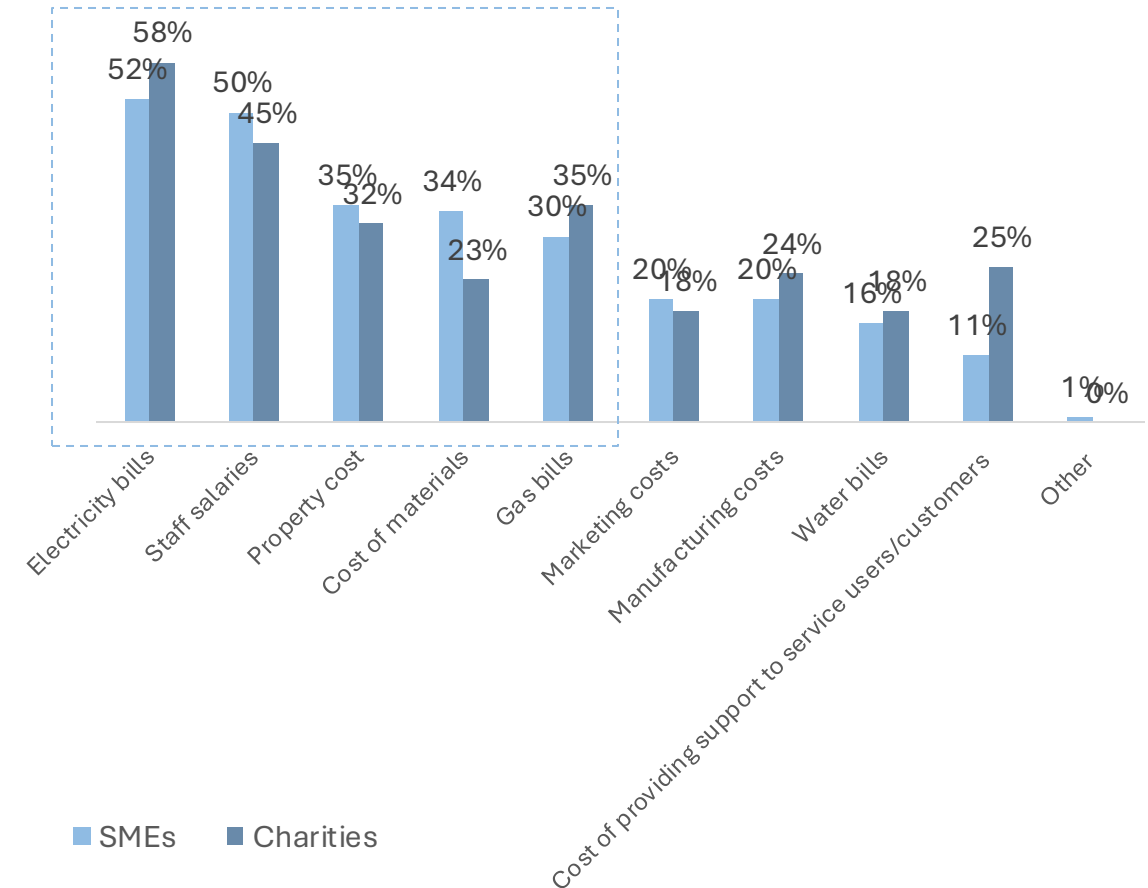
Experts also talk in depth about the specific pressures on small organisations who do not own their own premises: they know sustainable alternatives are beneficial in the long term, but many operate in old buildings, are unable to relocate, and lack the financial flexibility to invest in energy-saving solutions.

Alongside electricity bills, small organisations are dealing with rising costs of staff, property, materials and gas

Share of Monthly Outgoings Spent on Energy



Direct costs that have the biggest impact on the organisation



Q12: Approximately what proportion of the organisation's monthly outgoings is spent on energy bills? Base size: all SMEs (n=400); all charities (n=150)
Q14: From the following list, please select the three direct costs that have the biggest impact on your organisation? Base size: all SMEs (n=400); all charities (n=150)

Some are open to **relocating for cheaper energy costs**, particularly if electricity is one of their biggest costs



35%

of SMEs agree with the statement 'I would relocate my business/organisation if there were other regions of the UK with cheaper energy.'

Medium business are more likely to agree (47%), compared to micro (21%) or small (30%) businesses.

66% of SMEs who say they would relocate to another region also say they would relocate outside of the UK.



27%

of SMEs (consistent across size) agree with the statement 'I would relocate my business/organisation outside of the UK if there were cheaper energy costs.'

Those in the North are more likely to agree (32%) than those in the south (22%).



51%

of charities (consistent across size) agree with the statement 'I would relocate my business/organisation if there were other regions of the UK with cheaper energy.'

73% of charities who say they would relocate to another region also say they would relocate outside of the UK.



32%

of charities (consistent across size) agree with the statement 'I would relocate my business/organisation outside of the UK if there were cheaper energy costs.'

Those who select electricity as one of the direct costs with the biggest impact on the organisation are more likely to say they would move abroad (59% and 67% for SMEs and charities respectively).

However, energy is just one of many costs that small organisations consider when locating

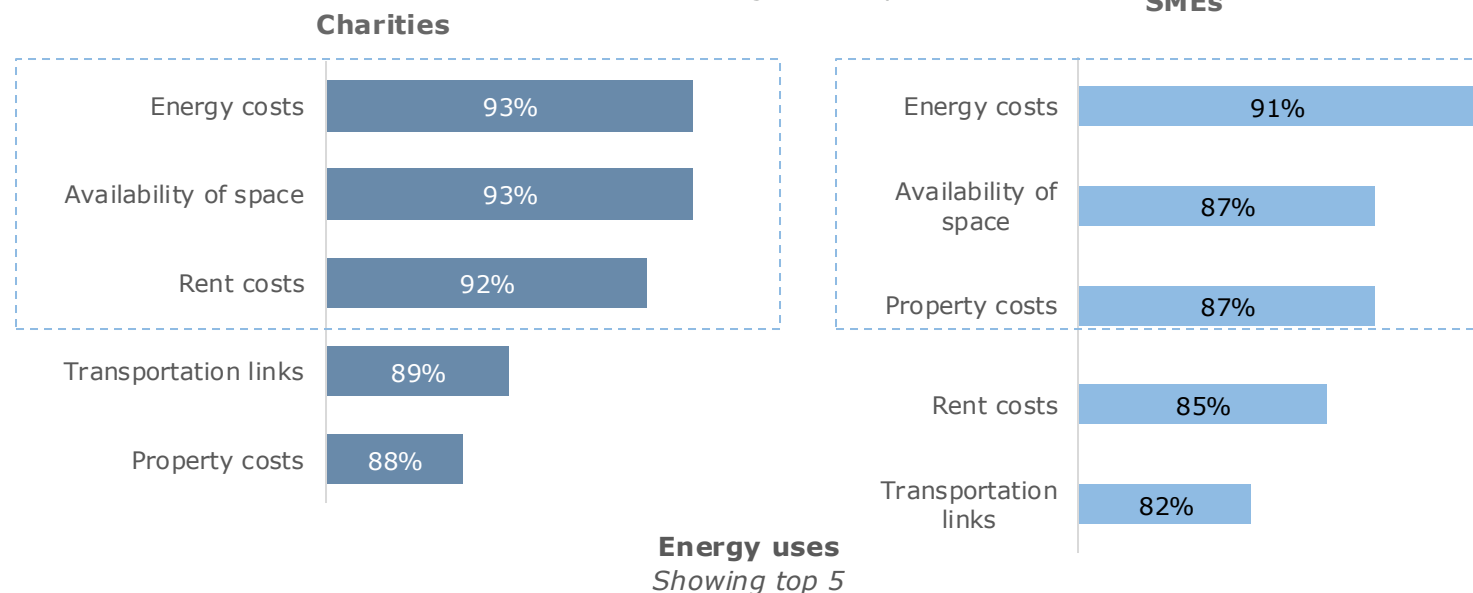
- For many small organisations, energy costs remain **an important consideration in future plans** and in decisions about **the location of premises**.
- Rising energy costs are often viewed as a **signal that other expenses** — such as rent and supply chain costs — **will also increase**.
- Many organisations, **particularly SMEs**, link these challenges to **wider economic uncertainties**, noting that geopolitical factors often play a significant role in driving such spikes.

"One of the [future challenges] will be finding the correct location... Secondly the volatility of gas prices [is] the other thing I am concerned about... especially with the US imposing tariffs in certain countries."

-SME

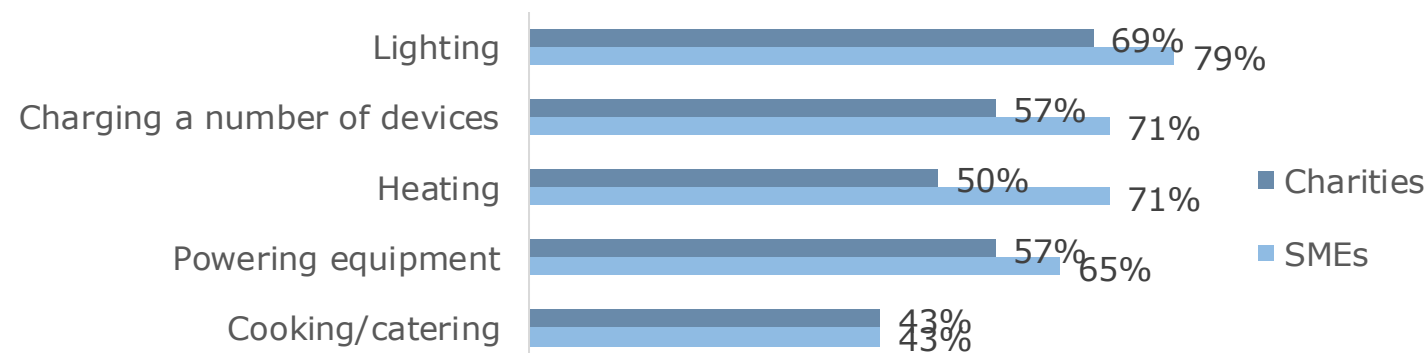
Important factors when deciding where to locate

Showing NET: important



Energy uses

Showing top 5



Energy behaviours



Energy is front of mind for small organisations today, regardless of size or sector

Across SMEs and charities...

"[Rise in energy] made us very cautious... it does make us think before we go and offer [an employee] a few more hours... [rise in energy] directly impacts on staff levels, and in turn impacts on our service users."

-Charity

... size of organization...

"The [challenge we face] is the volatility in energy costs. That can have an impact on [our outgoings]... Energy cost is like 30% of our main cost, excluding [the main services we provide]. It's something we tend to keep an eye on."

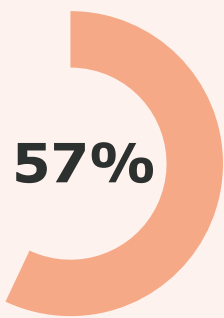
-SME, medium

... and sector

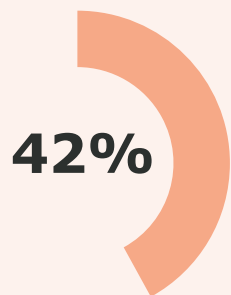
"We provide trainings for front of house, security and for catering... [and] we have to put prices up; if we charge £21 an hour for members of staff, it's gone up to £23 or £25. We have to pull the price from somewhere."

-SME

Concerns about the cost of energy bills are high across all small organisations



Of charities agree with the statement 'the increase in our energy bills is negatively impacting the service we are currently providing to our customers/service users'.



Of SMEs agree with the statement 'the increase in our energy bills is negatively impacting the service we are currently providing to our customers/service users'.

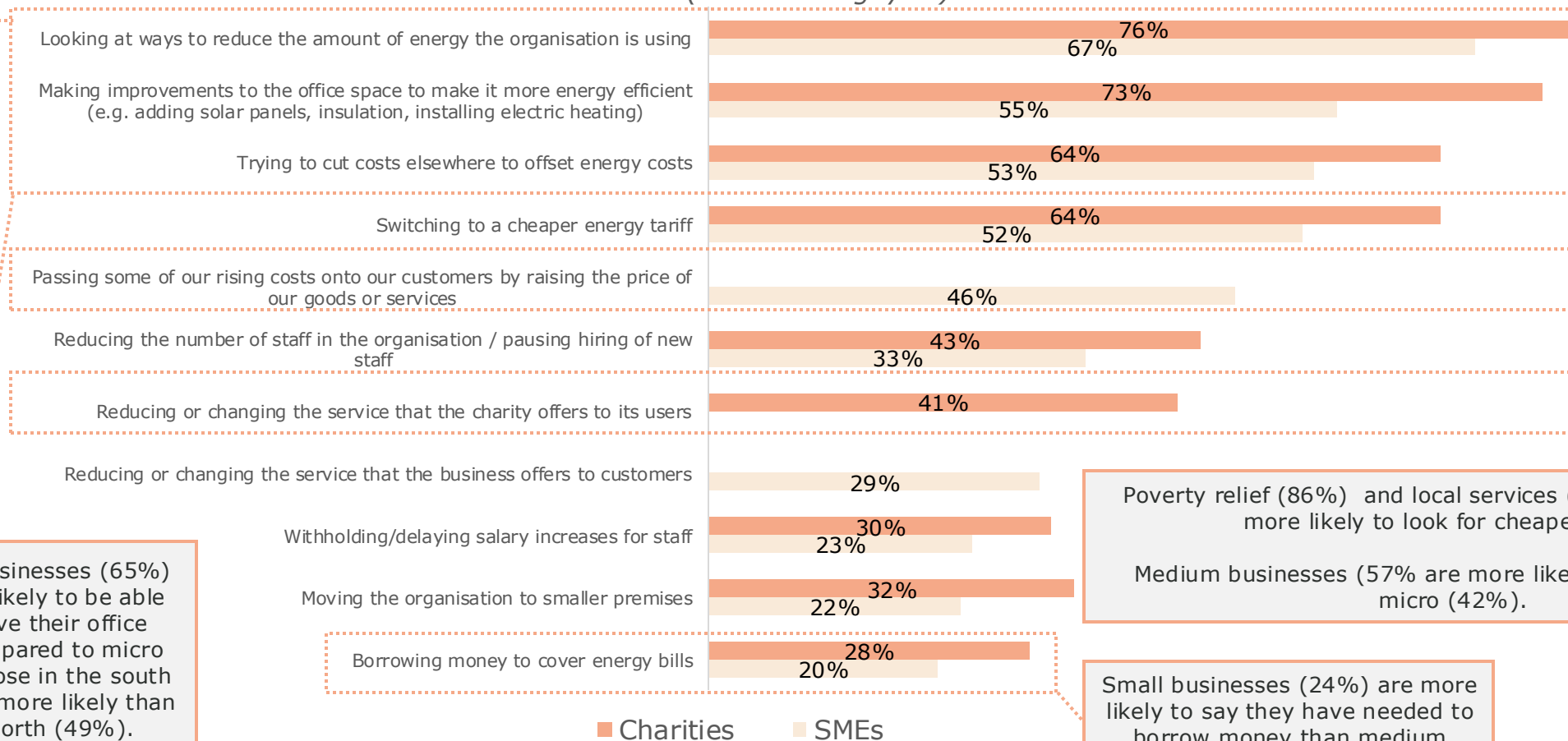
- **All small organisations are worried about the increasing cost of energy bills.** Across organisation size and sector, there is a resentment that they are paying more for exactly the same services as before.
- As we see in wider research with domestic customers, some are actively seeking ways to mitigate the impact of higher energy (and other operating) costs by cutting spending in other areas.
 - For charities, the pressure of paying these bills is compounded by other pressures facing charities (e.g. reduced donations and increased numbers of people requiring support).
- **Whilst small organisations feel there is more flexibility to reduce electricity use (e.g. turning off lights and other tech), gas feels less flexible and more necessary, making it harder to reduce spend.**
 - Heating in particular, and gas use more generally, is seen as strictly necessary and unlikely to be reduced in the future without an alternative source of energy for heating and hot water.
- **For those who require gas heating to operate, continuing to afford these bills (alongside other rising costs) and remain operational is a concern.**

Q15: Here are some statements people have made about running a small organisation in 2025. For each one, could you say how far you agree or disagree Base size: all SMEs, (n=400); all charities (n=150)

Small organisations are taking steps to cut their costs rather than pass costs onto service users or impact staff

Energy behaviours

Actions taken in response to increased costs (% answering 'yes')



Local charities are more likely to try to reduce their energy use (92%)

Charities who say heating is becoming a luxury are more likely to try and cut their costs (74%).

Medium businesses (60% are more likely to say this than micro (41%).

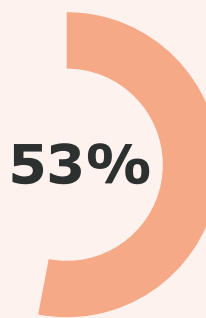
Medium businesses (65%) are more likely to be able to improve their office space compared to micro (41%). Those in the south (60%) are more likely than in the north (49%).

Poverty relief (86%) and local services (71%) charities are more likely to look for cheaper tariffs.

Medium businesses (57% are more likely to say this than micro (42%).

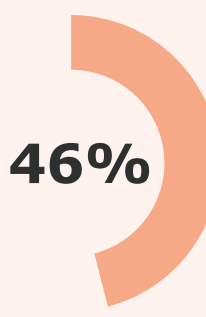
Small businesses (24%) are more likely to say they have needed to borrow money than medium businesses (25%).

SMEs are trying to cut costs and then passing costs onto consumers



53%

of SMEs say they are 'trying to cut costs elsewhere (e.g. in supply chain or manufacturing) to offset energy costs'.



46%

of SMEs say they are 'passing on some of our rising costs to consumers by raising the price of our goods or services'.

- For example, SMEs are trying to negotiate better deals with suppliers, making swaps for cheaper materials where they can, using cheaper distribution etc. However, trying to reduce costs is difficult as suppliers are also raising prices. Some SMEs are also replacing full-time staff with occasional freelancers.
- There are some costs they cannot cut back on, for example keeping their premises at a comfortable temperature for staff.
- **Once they have made the changes they can, some SMEs are passing on their cost increases to customers** by raising the price of their products or services in order to keep operating.
- However, other SMEs face challenges with this, and are unsure if they can increase prices and keep their customers, **so their own profits are squeezed instead.**

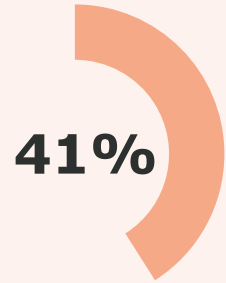
"We've had to streamline supply chain costs – we have good suppliers, and we can try and demand a lower price increase than they might suggest. We can shop around, but you're only going to get so good a deal given what's going on."

-SME

"We have to pass some costs on to the customer, but they tend to get more than one quote. There's a tricky balance between working for nothing and not having any work."

-SME

Similarly to SMEs, due to the pressure of rising costs, some charities are cutting back on non-essential services



41%

of charities say they are 'reducing or changing the service that the charity offers to its users'.



55%

of charities say that 'a reduction in donations from the public is making it challenging for us to cover our energy costs'.

- Fewer donations from the public, fewer grants and more competition are having a significant impact on charities' income. However, it is very difficult for charities to reduce their outgoings, particularly heating, which is essential to many charities who provide 'warm hubs' and other community services.
- Additionally, many charities are trying to support an increasing number of people, as the Cost of Living crisis pushes more people into difficulty. They are trying to do more, with less resource.
- **In order to make ends meet, some charities are having to cut back on 'nice to have' things and supplementary services in order to maintain the essentials.** For example, some charities have stopped organising days out or trips to cafes for their users, instead opting for coffee mornings in the office as these are significantly cheaper.
- Some charities also mention having part time employees rather than full time in order to reduce staff costs.

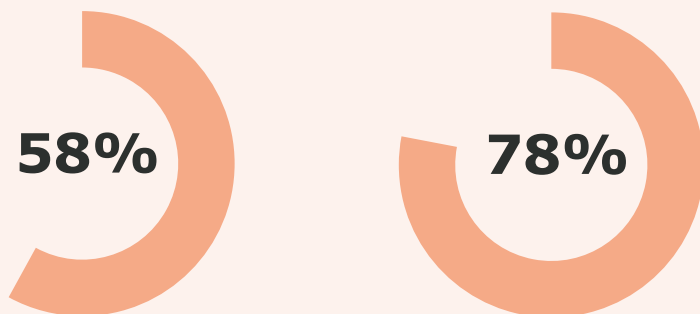
"If we do not have families or children [in the charity], we do turn off heating and put our fleeces on. [The employees] are very understanding".

-Charity

"We haven't been able to give salary increases in 3 years, and the staff is understanding of that. We feel that it is important to have a job, but if we do increase [services], we might lose [the job] in 2 years time."

-Charity

For most, energy companies are the best place to look for information about the sector



of
SMEs...

of
charities...

agree with the statement 'I would like there to be one single comprehensive information source for accurate and trustworthy information about how I can reduce my energy bills and the support available'.

- **The majority feel energy companies are best positioned to be an ongoing source of information on the topic** (in line with previous research with domestic consumers).
- Small organisations also talk about accessing information from Government sources, figures like Martin Lewis and through word of mouth. Several talk about doing general online searches for advice as well as looking at news articles.
- There does not seem to be one key place that small organisations know they can get all the necessary information from.



Small charities in particular either have not looked for information or have tried but are unsure where to find advice.

"If I had a query of energy usage I'd find someone on the bill and call. I wouldn't know where else to go to be fair."

- Charity

Access to support varies by size - **less than half of the smallest organisations know where to look for support**

51%



of SMEs agree with the statement 'I know where to go for information and support for reducing my energy bills'.

This increases to 59% for medium businesses, but only **40% of micro businesses know where to look.**

66%



of charities agree with the statement 'I know where to go for information and support for reducing my energy bills'.

This increases to 68% for national and 73% for regional charities. **For small, local charities, knowledge of where to look for support drops to 42%.**

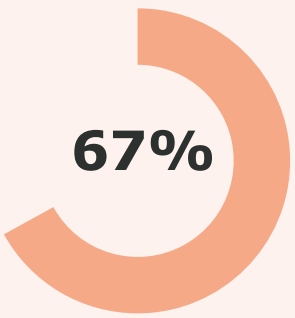
Experts agree that there is a **knowledge gap** for small organisations

- Experts and stakeholders agree that SMEs and charities encounter substantial barriers in accessing the necessary resources and expert guidance. They acknowledge the vast majority of advice is geared towards domestic consumers.
- Experts highlight that energy companies often adopt a 'top-down prioritisation' approach, focusing on larger organisations for carbon reduction efforts due to their scale and immediate impact.
- They emphasise the need for more targeted support for SMEs and charities.

Experts also talk in depth about the specific challenges of understanding and securing financial support for energy bills. These are discussed in more detail in the 'supporting small organisations' section.



Charities generally feel that energy companies and the government have supported them where possible



67%

of charities agree with the statement 'When it comes to the energy crisis, the energy industry has supported charities as much as possible in a very difficult situation'.



59%

of charities agree with the statement 'I think the Government are doing all they can to help small businesses / charities during the energy crisis'.

Despite the majority of charities feeling that energy companies and government are doing all they can to help, they do identify areas where this could go further:

- **Subsidised costs:** For example, government and energy companies working together to cap the amount that charities pay for their energy or offer reduced rates for charities, given the service they provide to the community.
- **Personalised advice:** Charities often do not have the time or resource to look in depth at their energy usage and where they could cut this back. If energy companies could provide advice to charities to help them identify where they can cut costs and better manage their energy use, this would be well received.

"I think with the government support, the best they could do is regulation, because it's really hard for them to create market in a very limited space."

-Charity

Most SMEs feel energy companies could be doing more to help them navigate the energy market

SMEs turn to **government advice** on sustainability and sources like Martin Lewis for financial advice. They also discuss with their supply chain and others in the industry.



SMEs expect **national and local government to support**. They feel currently available funding isn't generous enough to encourage actions like installing heat pumps. They feel local governments could be more active in engaging small businesses and providing tailored assistance.

They believe that **energy companies** have a responsibility to ensure advice and information reaches small businesses.



SMEs feel energy companies should provide tailored advice to save both electricity and gas, specific to businesses to guide them to the best deals and navigate grants.

"I feel like it is their [energy companies'] duty to get the knowledge into businesses that don't understand, especially industries that have much higher usage and a lack of knowledge. Take the hospitality industry, for example, not a lot of people within the hospitality industry have a clue [on] how to reduce energy."

-SME

36%

of SMEs agree with the statement 'When it comes to the energy crisis, the energy industry has supported charities as much as possible in a very difficult situation'.

32%

of SMEs agree with the statement 'I think the Government are doing all they can to help small businesses / charities during the energy crisis'.

Only 16% of micro businesses agree (compared to 32% for small and 41% for medium)

Engagement with sustainability



Small organisations are doing what they can to be sustainable, but are balancing multiple competing priorities...

Both SMEs and charities would like to make their organisation more sustainable, and see the value in doing this...

"I think [sustainability] is a priority [for small organisations]. Without it, businesses won't last as long as it can do."

-SME

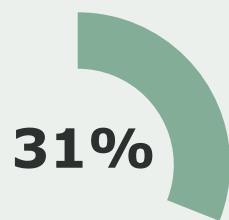
... However, sustainability is rarely the top priority when considered alongside the other demands on small organisations' resources.

"I think it should be a priority for everyone, but it can be hard when you are small [charity], as it tends to be one person dealing with lots of different areas. Therefore, [it] can be difficult to get the right advice - and money can sometimes be a problem."

-Charity

Experts agree that ongoing financial pressures is mentally draining on those running small organisations, demanding substantial time and energy. This then leaves little room for future thinking and sustainability planning to lower costs in the long run.

Sustainability is important to small organisations, but they will need support to encourage them to prioritise this



of small organisations (**consistent across SMEs and charities**) agree with the statement 'Sustainability is not a priority for my organisation right now'.

Medium businesses are more likely to **disagree** (i.e. say sustainability is a priority) at 57% compared to small (43%) or micro (34%).

"We are always looking at ways to improve sustainability but sometimes need advice and help from more clued-up people around this."

-Charity

Small organisations are **operating in a tough set of circumstances**: increased costs, customers spending less money, and more vulnerable people needing access to charitable services.

In this context, **sustainability goals can be deprioritised**, despite small organisations understanding the importance of reducing their energy consumption.

In order to be more sustainable, **small organisations require financial help and tailored advice**.



SMEs are engaged with sustainability, but they will need more support to fully embrace sustainable changes

- SMEs all understand the importance of sustainability, both **for the environment** and for how they **present their organisation** to clients / customers.
- SMEs do not tend to have **specific quantified energy use goals**, but they do aim to be sparing where possible – and at **least, not wasteful**.
- They readily adopt behaviours such as turning off tech overnight and putting lights on timers. This is often as much about **saving cost as it is about sustainability**.
- Whilst larger businesses can have people with dedicated sustainability roles, **smaller businesses cannot do this**.

We're trying to do as much as we can, more so for how it's viewed from outside, because people are concerned about that; they like to know that you are sort of an ethical company. [Sustainability is] not something we obsess with in my head, [because] there's a certain level you can get to [as an SME], and that's it...We're gradually changing our fleet over to electric vehicles which feels like the obvious thing to do.

-SME

I'd agree that sustainability often isn't a top priority for small organisations right now. It's not because we don't care, it's just that we're juggling so many immediate pressures like costs, staffing, and keeping the business running. Sustainability can feel like a long-term goal we struggle to focus on.

-SME

Charities aim to be as sustainable as possible, but they are often unable to prioritise this

- For smaller charities in particular, sustainability is a lower priority.
- They do not tend to have the staff or financial resource to dedicate to sustainable changes and have to focus their increasingly stretched resources on maintaining their essential services.
- As a result, many charities are **focusing on simpler, cost-effective ways to promote sustainability**. For them, these measures are as much about cutting back on costs as they are about sustainability.

Private & Confidential

Sustainability for us is a lot more about suppliers. It's about materials [we] use and things like that. But [we are] a small team, so it's individual [actions we take] to make a dent on it, really.

- Charity

Yes, [I agree that sustainability] is not a priority for our charity... but it is an important area and if we expand, then it becomes a much more important factor both from a cost-saving and environmental perspective.

- Charity

But, small organisations are taking small steps towards a sustainable future that feels manageable

55%

Of **SMEs** say they are making improvements to make their office space more energy efficient, in response to rising costs.

However, this drops to 41% for micro businesses (65% for medium businesses).

73%

Of **charities** say the same, but this drops to 63% for small, local charities.

"Our costs are a fair bit higher, but we know it's a cold time of the year... We are trying to get the staff to be conscious of closing doors [and] putting strips down the doors."

-Charity



Charities implement easy to adopt sustainable behaviours, such as installing LED lights, turning off lights when not in use, and ensuring doors are closed to prevent heat from escaping.



SMEs have implemented cost-effective sustainable strategies such as cycle-to-work schemes, going paperless, or offering part-time work arrangements that help balance sustainability with operational needs.

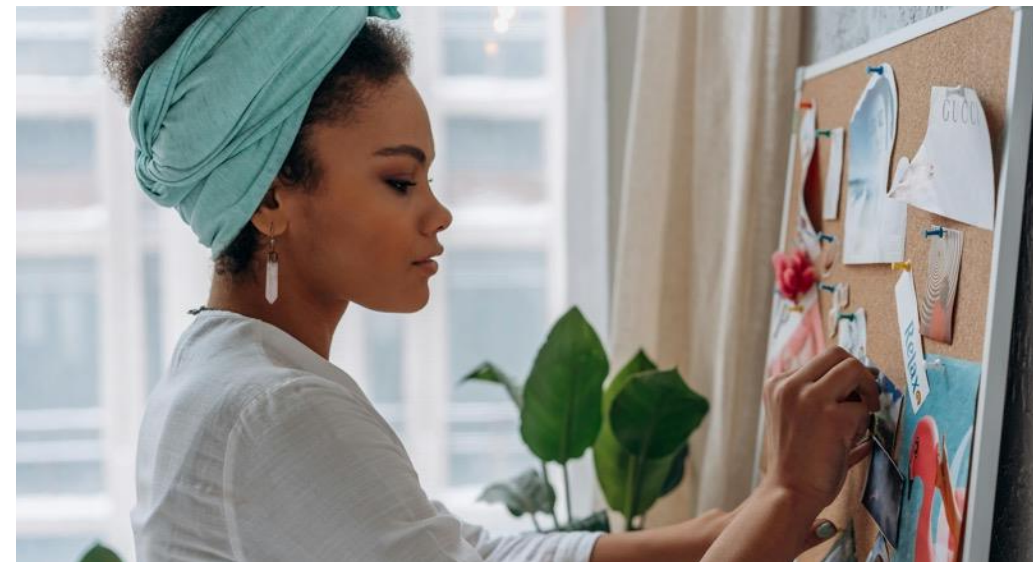
Despite acknowledging the importance of sustainability, small organisations often **lack the resource to act**

For small organisations, sustainable solutions such as solar panels and heat pumps are too expensive. These can feel like a poor investment for an organisation which is running on a tight budget, as many are.

This is amplified for those **who don't own their premises**, making such alternatives impractical, if not impossible, to implement.



This challenge is particularly pronounced for charities - their extremely tight budgets stop them from saving to invest in sustainable solutions that could save them money in the long term.



"I can't really [think of alternative solutions], other than solar panels. Which will be difficult because I don't own the building. It's a big expense, what if something happened to my business, and I wanted to move on?"

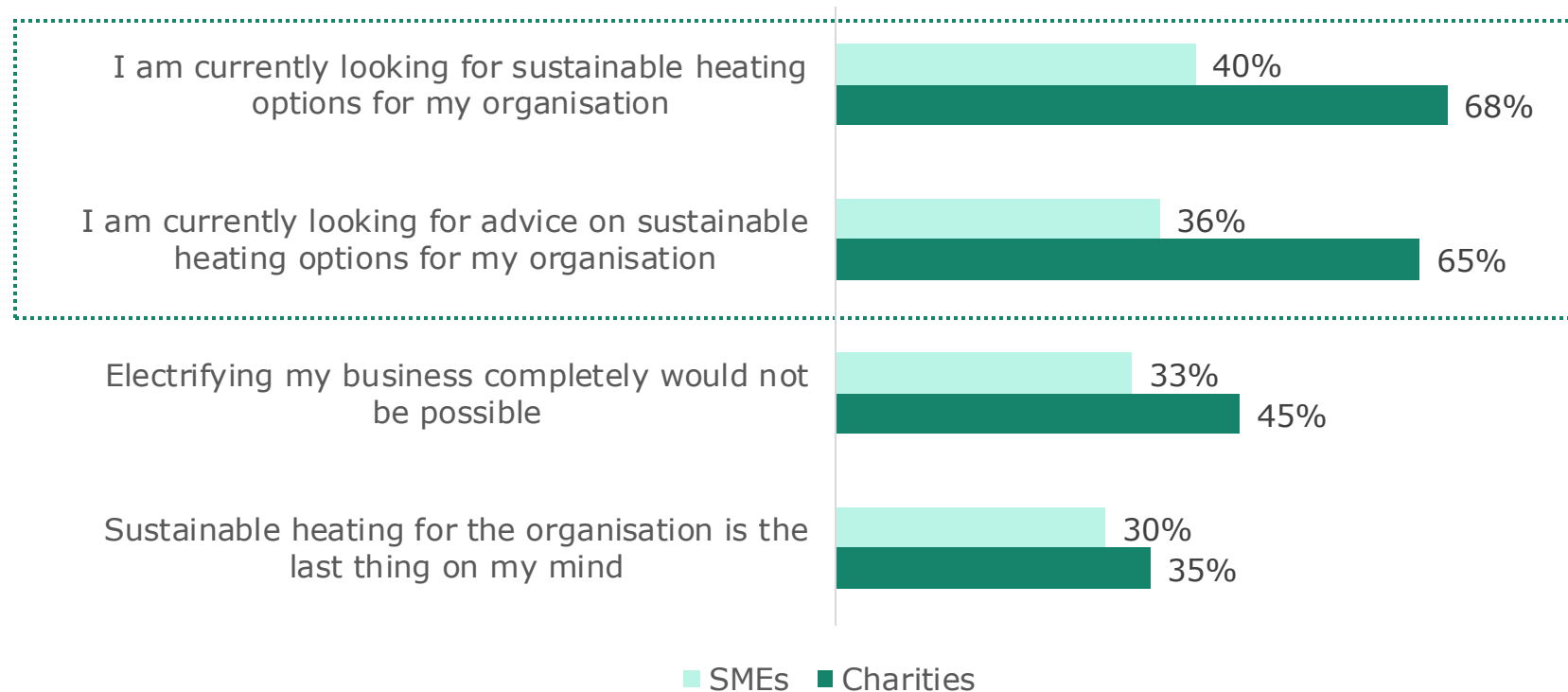
—SME

Small organisations are looking to reduce their energy consumption, and charities in particular are **looking for advice on this**

67%

of SMEs (**consistent across size**) say yes to the statement 'We are looking at ways to reduce the amount of energy the organisation is using'.

Respondents engagement with sustainability *Showing Net: agree*



Q16: Which, if any, of the following actions are you currently doing in response to the increased pressure of rising costs? Base size: all SMEs (n=400)
Q17: How far do you agree with the following statements? Base size: all SMEs (n=400). Base size: all charities (n=150)

From a charity perspective... [sustainability] is a hot topic that we always talk about. [Charities] have a moral compass attached to some of these issues. In terms of disinterest in this area, I think it's more guilt [charities feel]; they know they have to [be sustainable], but they cannot. They also know the advantages of investing in these sustainable resources... If anyone were to put solutions on the table, they would do it - it's just the instance of there isn't feasible solutions to offer.

-Expert

Experts echo this, agreeing that small organisations need more support

Experts (in SMEs, charities and energy) agree that small organisations want to be more sustainable to mitigate the pressures faced by rising energy costs. They also agree that **short-term solutions are generally prioritised**, due to uncertainty about whether the organisation will be operating in the future. They agree that there needs to be support to shift towards long-term sustainable solutions.

Experts feel that investing in sustainability must be an attractive and viable option, without taking away from the day-to-day customer experience. To do this, small organisations need to be presented with better long-term investment options for sustainable improvements, as it is typically very difficult for them to make larger financial investments.

Heating



Keeping premises warm and comfortable is essential for most small organisations, and can be a struggle

55%

Of SMEs

75%

Of charities

agree with the statement 'the comfort of staff and customers is core to the success of my business model'.

50%

Of SMEs

60%

Of charities

agree with the statement 'Heating is becoming a luxury for some organisations in the UK right now.'

Medium sized businesses are more likely to agree (57%), compared to micro businesses (41%).

Q17: How far do you agree with the following statements? Base size: all SMEs (n=400); micro (n=102); small (n=132); medium (n=166); all charities (n=150)

For many small organisations, providing a warm and comfortable environment is vital.

- For example, keeping offices at a comfortable temperature, or providing comfortable spaces for beauty treatments.
- Charities in particular cannot afford to cut back on heating, especially if they are providing 'warm hubs' or health services for vulnerable people.

For the small organisations that need gas heating in order to operate, the rising cost of heating is posing a significant challenge. For some, keeping up with their energy bills is a worry.

- Although gas is often not their largest outgoing (compared to electricity and staff salaries) it is still enough to be a concern.

But there is limited flexibility in reducing gas usage.

"We have a hydrotherapy pool, it is therapy in water... [the] pool has to be heated by 34 degrees – we do not have a choice, we have to provide that [so] we are completely reliant on energy"

-Charity

55%

Of SMEs say gas heating is vital – they couldn't operate without it.

71% of chip shops/curry houses say gas is vital*

37%

Of charities say gas heating is vital – they couldn't operate without it.

Gas heating is seen as vital for many, and **more difficult to cut back on**

- Heating and hot water are seen as necessary costs for both sectors, which are **almost impossible to cut down on**.

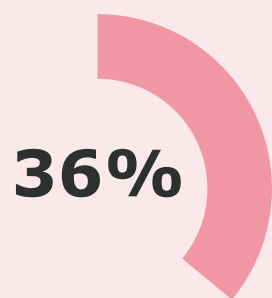


- For SMEs, there are requirements to keep workplaces at a comfortable temperature.



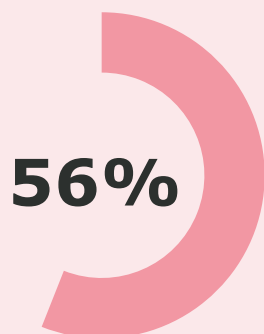
- Some charities are registered warm hubs, providing warmth for their communities.
- Although small organisations are aware of technology that could reduce their gas use (e.g. solar panels and heat pumps), these are **too expensive for them to invest in**.
- Conversely, reducing electricity feels more familiar (e.g. turning off lights), and small organisations generally feel there is **more advice available for how to cut down on energy in ways that are manageable for small organisations**.

Hybrid working has gone some way to helping some small organisations, but for most they still need to keep their heating on



Of SMEs agree with the statement 'hybrid working means I am heating empty/underused buildings at times'.

Small and medium sized businesses (both 39%) are more likely to agree than micro businesses (25%).



Of charities agree with the statement 'hybrid working means I am heating empty/underused buildings at times'.



For some SMEs who work in offices there are days when they can turn of the heating and save on energy costs (e.g. if all employees are working from home).

For most, hybrid working hasn't made a difference to gas use given this is mainly for heating. Even with fewer employees in the office, unless the building is empty there is still a need to have premises heated at all times (outside of summer).

Despite needing to keep the heating on, some SMEs and charities describe putting heating on a timer, or turning it down when it's not needed. For others, there may be a gap in applying their at-home energy saving mindset to the organisation.

"Certain [staff] will work on certain days. I would be struggling if everyone worked full-time. [If] the room is not occupied after 1PM, the thermostat is going to be off."

-SME

Experts acknowledge that cutting back on heating is a large challenge for small organisations that have customers and users to serve

They discuss that keeping a warm and comfortable environment is often vital to the success of small businesses and charities, and therefore making changes to alternative heating sources could be detrimental to the service they offer and negatively impact their organisation.

It is clear that while both SMEs and charities are eager to reduce energy costs, they often encounter the barrier of substantial upfront investments (e.g. for new heating solutions) that may not yield noticeable returns for many years.

Supporting small organisations now and in the future



What do small organisations hope for their future?

Sustainable growth and stability...

"We want to continue to grow... [but] we need to find ways that are agile, efficient, smart. [That way], we can continue to make a return. We've just got to make sure that we continue to provide [our services] and make a return."

-SME

Financial resilience and managing rising costs...

"I hope we are still around that's the main thing. I wouldn't say we are looking for major growth... [but] for profit and saving costs where possible. Maybe modernising and adapting to our circumstances and the world around us."

-SME

Service and staff development...

"I would like to offer more services to service users, especially on the well-being side. Because we think that if somebody's in a good state of mind, a lot of different areas become easier for that service user."

-Charity



Despite remaining hopeful about their future, small organisations often caveat these ambitions with concerns over rising costs and funding uncertainties. Limited capacity to plan ahead leaves many fearing these challenges could hinder their future goals.

Financial support and clear, tailored advice emerge as key priorities for energy companies to consider

Financial support

Across both sectors there is a feeling that there should be more options to help small organisations fund energy costs and sustainable changes. For example, delayed payments or loans to allow them to make sustainable investments.

Charities in particular are hopeful that **energy companies could offer reduced tariffs or additional grants as part of their CSR initiatives**. While they don't expect energy to be free, a more affordable rate would make a positive impact, benefiting both the charity and the energy company's reputation by contributing to the community.

Tailored advice

Additionally, some small businesses find communications from energy suppliers **overwhelming and hard to understand**.

They feel it is the energy companies' responsibility to provide really clear information about why their energy bills are changing and what options are available, tailored to their organisation type.

SMEs suggest that providers should also **engage them more actively**, using multiple channels—such as emails, cold calls, and flyers—to explain how they can reduce energy usage and lower costs.



Charities in particular would like grant funding to help them continue to support those who are vulnerable

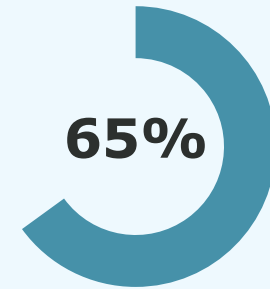
- Grant funding emerges as the **most common request** among charities, seen as essential for **maintaining services** and **covering rising operational costs**.
- However, securing these funds is often **inconsistent** and **unstable** due to **competition** for limited resources and a **lack of clear guidance** on how to access or apply for the right schemes – this often creates **anxiety** about the charity's ability to sustain its services and **plan for the future**.

"We have applied to Cadent once before for funding... [but] we know that places are overwhelmed when it comes to funding."

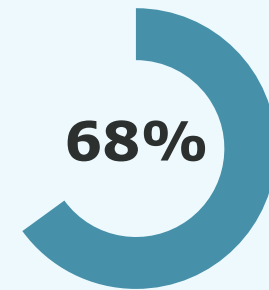
-Charity

"If bills keep going up, a lot more small groups and charities are going to fold... [we] are struggling to get funding to carry on."

-Charity



Of charities agree with the statement 'I am currently looking for advice on sustainable heating options for the organisation'.



Of charities agree with the statement 'I am currently looking for sustainable heating options for my organisation'.

Q16: Which, if any, of the following actions are you currently doing in response to the increased pressure of rising costs? Base size: all charities (n=150)

They feel it is **government responsibility** to help fund changes and support organisations that provide services to the community



SMEs

SMEs feel the government have a key role to play in funding sustainable changes and improvements, as well as educating about what technologies are available.

They also feel that as they hire and contribute to the economy, **creating conditions for their success should be a priority, particularly for the government.**

They also want **advance notice of price changes** to better plan for future cash flow.



Charities

Similarly, as charities offer a vital service to a growing number of vulnerable people, they feel there should be a **greater number of grants available to charities to help with the rising cost of energy.**

They point out that when costs increase, more individuals struggle to make ends meet, which in turns means more people rely on charities, who are also struggling with increased costs. The charities are therefore **having to help more people, with less money.**

Their view is that the government should take increased energy costs into consideration when considering broader policy (e.g. around benefits).



SMEs are in favour of CSR strategies and see value in energy suppliers having charitable foundations

- **The majority of SMEs mention having CSR strategies** and emphasise the importance of these across the organisation, both ethically and to strengthen customer relationships.
- SMEs **value** working with suppliers, **including energy providers**, that also have an **established CSR framework** which aligns with their own practices.
- As a result, many SMEs view charitable foundations as a way for **energy providers to demonstrate genuine commitment** to supporting vulnerable people and giving back to communities.

However, some SMEs highlight that they are **often limited in their choice** of energy suppliers due to cost. As a result, **affordability** may sometimes **outweigh considerations** of whether a supplier has a charitable foundation.

"I think it is [important for energy suppliers to have charitable foundations]. We want our providers, whether it's wholesale or supplies, to have a similar ethos to what we do... it boosts our own brand as well knowing that we're working with businesses who have got similar ethos to us."

-SME

"I would consider [our CSR strategy] as important. It gives trust [and] shows genuine side of companies. [SMEs] doing something relevant in terms of their sector puts more trust into [their] company."

-SME

"I think most people just do the cheapest [energy] supplier... [for some], they're always going to be with British Gas because they've been with them all their life. I'm not sure someone goes 'right, I want to review their charitable work before I sign up with them.'"

-SME

Experts identify **three key ways** in which small organisations could be supported to access the necessary resource and guidance

1. Accessible funding

Allowing small organisations to pay for energy solutions in smaller instalments, rather than requiring large upfront payments.

This challenge is particularly evident for charities, as they are typically unable to secure funding for core operational costs. As a result, while energy efficiency improvements are necessary, they become difficult to prioritise.

2. Tailored support

Experts highlight that energy companies often adopt a 'top-down' prioritisation approach, focusing on larger organisations for carbon reduction efforts due to their scale and immediate impact.

They emphasise the need for more targeted support for SMEs and charities, who are at risk of being left without the resources needed to make meaningful progress in reducing energy consumption.

3. Navigating funding

Providing support to navigate the grant application process (which had become increasingly competitive amongst SMEs and charities) would help organisations without the expertise to access this support.

We showed small organisations five ideas to support them with their energy costs and fill a knowledge gap

The role of charitable foundations



Since 2019, the Cadent Foundation has funded charities help to tackle fuel poverty and keep homes warm.

Charitable foundations form an important part of energy companies and can be used to support small organisations to help them provide their support and better help the people they serve.

Cadent Greener Society



Cadent have plans to reduce emissions and support the UK by becoming more sustainable through 2 key areas: reducing emissions and Moving to Greener Gases in the network.

If Cadent could supply small organisations with cleaner energy, they would not need to make any changes in order to hit their sustainability targets.

Advice to help grant applications



Small organisations often lack the time or staff to write competitive grant applications.

Cadent could support small organisations working on energy and fuel poverty by sharing simple, practical tips to strengthen applications and improve access to funding.

Hints and tips



Advice and support could be tailored to:

- 1. Supporting small businesses operating from homes with energy-saving and financial advice**
- 2. Helping organisations that assist vulnerable people with targeted advice**
- 3. Offering tailored advice to small organisations in fuel poverty**

Funding support for charities



Cadent's research with SMEs and charitable organisations show they are struggling more than ever.

Cadent could partner with these small organisations by providing funding to ease their energy costs, helping them continue vital services for vulnerable communities.

Small organisations support Cadent’s ideas, but call for greater clarity, accessibility and relevance

The role of charitable foundations

Impact	Low awareness, but have strong support for proactive foundation work
Usefulness	Extremely important for charities, but small organisations seek clear guidance and visibility

Hints and tips

Impact	Practical, tailored energy advice helps small organisations manage costs
Usefulness	Seen as valuable if idea is accessible, action-focused and easy to apply

Cadent Greener Society

Impact	Widely valued for driving sustainability, greener gases, and efficiency goals
Usefulness	Greener gas valuable for helping small organisations reach sustainability targets. SMEs want to align with companies demonstrating emission reductions

Funding support for charities

Impact	Seen as a timely way for energy companies to help cover rising costs, easing strain on essential services
Usefulness	While the support feels meaningful, low awareness among small organisations highlights the need for clarity

Advice to help grant applications

Impact	Addresses resource gaps in completing competitive grant applications effectively
Usefulness	Small organisations emphasise that help provided must be simple and accessible

Small organisations value **Charitable Foundations**, feeling energy companies are well placed to support vulnerable people



- Small organisations recognise the importance of charitable foundations for supporting society and vulnerable communities.
- They welcome the idea of energy companies using their position to give back to those in need.
- Small organisations want to be partnered with companies doing impactful community work, as this aligns with their values and ethos.



- Although small organisations respond positively when told about foundations, many are unaware that charitable foundations exist or what they do.
- Some feel that this should be a 'given', as energy companies should play a proactive role in delivering structured support
- There is a call for Cadent to provide more visible evidence of the work of foundations and the impact.



SMEs feel particularly connected to this concept, as many are already **involved in charitable support themselves**. This approach is often seen to have a **dual benefit**: not only is it the morally right thing to do but also enhances brand image – potentially attracting more customers through improved public perception.

"I wasn't really aware that energy companies like Cadent had charitable foundations... As a business owner, anything that supports vulnerable households and energy efficiency is definitely something I'd take an interest in."

-SME

"Energy companies should legally have to provide charitable support to those charities working with local people to ensure they are not in poverty."

-Charity

Small organisations welcome Cadent's focus on **reducing emissions**. Partnering with green suppliers helps both the environment and their brand image



- Reducing emissions is seen as Cadent setting a positive example to be greener, which they feel the energy industry should be doing.
- Small organisations welcome suppliers with strong green credentials. They want to partner with suppliers who are actively promoting this, as it aligns with their values and looks good to customers.



- Small organisations call for clearer, more actionable guidance from Cadent to help them understand how the proposed changes apply to their specific context.



Charities mention that they actively seek ways to improve their sustainability **but often struggle to access the right information**. Cadent's leadership on reducing emissions could help bridge this gap, **if communicated clearly and effectively**.

"I think [this idea] should be a priority for everyone, but it can be hard when you are small as it tends to be one person dealing with lots of different areas and therefore can be difficult to get the right advice."

-Charity

"[Reducing emissions] is incredibly important, to meet new zero target and support wider government goals."

-SME

Small organisations praise **Greener Gases** for helping them meet their sustainability goals



- Small organisations react positively to Cadent's greener gas plans, as this helps them achieve sustainability goals without having to make as many changes internally (which many struggle to do).
- By making the network cleaner, Cadent helps reduce environmental impact of small organisations, without them having to invest in greener energy themselves.



- Small organisations call for more detail on what greener gas means in practice, and how quickly it will be available.
- Some small organisations use limited amounts of gas and question how impactful the benefits of greener gas would be for them.



SMEs see support like this as **valuable**, as many **lack the expertise or resources** to navigate green energy or energy efficiency on their own.

"I believe [Greener Gases] will make a great difference in reaching our sustainability targets; definitely a move in the right direction."

-Charity

"[Greener Gases] would make our organisation more aligned in its values to be greener, [more] conscious of the environment, and the issues surrounding it."

-SME

Tailored hints and tips resonates with small organisations looking for clear, actionable steps



- Small organisations value tailored advice that reflects their realities, seeing it as practical and useful.
- Extending support to those operating from domestic premises is particularly welcomed, addressing a gap in traditional advice.
- Energy-saving advice should not be one-size-fits-all, with many seeing potential for both cost savings and productivity gains.



- Some question whether the advice will be worth engaging with in practice.
- Time constraints and limited capacity mean guidance must be simple and efficient to implement.
- Advice needs to be clearly linked to tangible, measurable outcomes to drive meaningful action.



Charities often receive help that comes through cold calls at **inconvenient times**, making it **difficult to engage**. To improve accessibility, energy-saving advice should be **made available online** or in formats that can be **accessed at the organisation's convenience**.

"[Hints and tips] would be useful, but it is also having the time myself... and not being cold called and put on the spot would be good."

-Charity

"I think [this idea] would help solve a problem we face. Managing energy costs and usage is a constant challenge, but there's not always clear, tailored advice for businesses our size."

-SME

Small organisations welcome **advice to help grant applications**, but call for a simple, transparent process



- Many small organisations see grant writing support as a practical and tangible way for the industry to address real operational challenges.
- The idea is valued for helping those who lack the time, staff, and expertise to complete competitive applications.
- Small organisations particularly appreciate its potential to support charities working with vulnerable communities.



- Some are concerned that the grant process could remain too complex or time-consuming, even with guidance.
- There is a clear call for simplified, step-by-step tools such as templates, how-to videos, and easy-to-follow resources.
- Small organisations also want more transparency on benefits and success rates to judge whether the time investment is worthwhile.



SMEs in particular mention that this type of support would be highly beneficial, as many lack the **time** or **expertise** to **navigate funding** or energy efficiency schemes.

"[The industry] should offer [advice to help grant applications]. But I wonder if the process is seen as too hard then it could be a wider problem."

-SME

"I think this is a great idea. We are a small charity operating out of a domestic premises but paying business prices. Gas and electric are our biggest expenses after insurance."

-Charity

Small organisations value **funding support for charities** as timely and meaningful, but limited by low awareness



- Small organisations see funding support as a practical way to ease financial strain and maintain essential services.
- The initiative is welcomed as timely, especially with rising energy costs placing pressure on operations.
- Many appreciate that energy companies, like Cadent, are taking proactive steps to help cover costs.



- Awareness of the scheme is low, with many unsure how, or if, it applies to them.
- Limited visibility and unclear communication risk reducing uptake and impact.
- Small organisations call for stronger promotion and proactive outreach to ensure support feels accessible.



SMEs in particular mention the idea reflecting a positive step towards **social responsibility**, recognising the potential for energy companies to play a **more active role** in supporting community resilience and creating lasting **positive change**.

"This [idea] is a really good and noble thing for energy companies to be doing... everybody should be sympathetic to the most vulnerable people."

-SME

"The cost of living and running a charity has become a lot harder... and we [are] always looking at ways of making sure we get value for money. More advice and information needs to be available."

-Charity



Thank you

alister@thinksinsight.com
abarker@thinksinsight.com
emacgregor@thinksinsight.com
kyigitachikbash@thinksinsight.com

T: +44 (0)20 7845 5880
www.thinksinsight.com

Thinks Insight & Strategy
West Wing
Somerset House
London
WC2R 1LA
United Kingdom

Appendix

Tracking Questions and other data

Private & Confidential

Impact of cost-of-living on sustainability (all respondents)

	Net: Agree				Percentage point change	Statistically significant differences
	May 23	Nov 23	June 24	Sept 25		
The most vulnerable in society need the most support when it comes to being more environmentally friendly	61%	62%	65%	56%	-9	Those who work for micro businesses are more likely to agree that there is little that individual people can do on their own to make real impact (46%).
There is really very little that individual people can do on their own to make a real impact, it needs businesses and Government to do much more	53%	51%	50%	49%	-1	Those who work for small and medium businesses are 22% more likely to feel that they have been more environmentally friendly over the past year, but mainly because of the inability to afford to consume as much, compared to those who work for micro businesses (48% small/medium, 26% micro businesses respectively).
I think that being more sustainable is really important, but it just isn't a priority at the moment with the cost-of-living crisis	51%	53%	54%	51%	-3	
I have been more environmentally friendly over the past year or so, but mainly because I can't afford to consume as much as I used to	46%	45%	47%	35%	-12	
The cost-of-living crisis has actually made me do more things to be environmentally friendly	35%	35%	35%	32%	-2	The cost-of-living crisis has affected young peoples' ability to be sustainable significantly more than their older counterparts, with 42% of 18-30 agreeing , compared to 26% for respondents aged 31 and above.
Since the start of the cost-of-living crisis I have had to put sustainability on hold	28%	32%	33%	29%	-4	

Public Quant Survey Wave 1 2023 : Here are some statements that people have made about trying to be more environmentally friendly and sustainable. For each one, say how far you agree or disagree. Base: All public (2,080)

Public Quant Survey Wave 3 2023: Here are some statements that people have made about trying to be more environmentally friendly and sustainable. For each one, say how far you agree or disagree. Base: All public (2,124)

Public Quant Survey Wave 1 2024: Here are some statements that people have made about trying to be more environmentally friendly and sustainable. For each one, say how far you agree or disagree. Base: All public (2,085)

Public Quant Survey 2025: Here are some statements that people have made about trying to be more environmentally friendly and sustainable. For each one, say how far you agree or disagree. Base: All public (2,073)

Role of energy companies in sustainability (all respondents)

	Net: Agree				Percentage point change	Statistically significant differences
	May 23	Nov 23	June 24	Sept 25		
Energy companies have the resources and expertise to take the lead in creating a more sustainable UK	79%	79%	75%	67%	-8	AB respondents are more likely to agree with this statement (71%) than DE respondents (62%).
Energy companies have a unique responsibility to offer advice, information and support to customers to help them to be more sustainable	77%	78%	73%	64%	-9	
Energy companies have a particular responsibility for protecting the most vulnerable in our society	74%	75%	68%	65%	-3	Those who work for micro businesses are less likely to agree with this statement (57%) compared to those who work in small and medium businesses (68% and 63% respectively).
Energy companies have a particular responsibility for helping the most vulnerable in our society to be more sustainable	72%	70%	66%	59%	-7	
Energy companies have more responsibility than other businesses as this is who we pay our bills to	70%	71%	65%	60%	-5	Those who work for small and medium businesses are more likely to agree with this statement (45% and 46% respectively) than those who work for micro businesses (35%).
Energy companies can't be trusted to help individuals and families to make more sustainable choices because it isn't in their commercial interest	60%	55%	53%	49%	-4	
Energy companies are the last people I would go to for objective advice about using energy more sustainably	42%	39%	34%	37%	-3	

Public Quant Survey Wave 1 2023: Thinking about energy companies, how much do you agree with each of the following statements when it comes to energy companies' role in helping individuals, families, and the country in general, to be more sustainable? Base: All public (2,080)

Public Quant Survey Wave 3 2023: Thinking about energy companies, how much do you agree with each of the following statements when it comes to energy companies' role in helping individuals, families, and the country in general, to be more sustainable? Base: All public (2,124)

Public Quant Survey Wave 1 2024: Thinking about energy companies, how much do you agree with each of the following statements when it comes to energy companies' role in helping individuals, families, and the country in general, to be more sustainable? Base: All public (2,085)

Public Quant Survey 2025: Thinking about energy companies, how much do you agree with each of the following statements when it comes to energy companies' role in helping individuals, families, and the country in general, to be more sustainable? Base: All public (2,073)

Role of energy companies in sustainability (all respondents)

Net: Agree

Energy companies should be focusing more on improving affordability of bills rather than sustainability right now

Energy companies have the same responsibility and role to play as any other business

Energy companies can be trusted to give advice on energy saving products, services and solutions because they have the knowledge and expertise

Sept 25

61%

64%

43%

Statistically significant differences

Older respondents are more likely to agree with this statement compared to younger respondents (**63%** and **55%** respectively). Those who work in small/medium businesses are more likely to agree with this statement than those who work in micro businesses (**65%** and **62%**, compared to **51%**, respectively).

Those who work for micro businesses are less likely to agree (**40%**) that energy companies can be trusted to give advice on energy saving products, to those who work for small or medium sized businesses (both **52%**).

Statements about life in the UK today (all respondents)

	Net: Agree				Percentage point change	Statistically significant differences
	May 23	Nov 23	June 24	Sept 25		
I would like there to be one single comprehensive information source for accurate and trustworthy information about energy bills/support available	69%	68%	68%	62%	-6	Older respondents of 31+ are more likely to agree (64%) there to be one single comprehensive information source about energy bills/support than younger respondents of 18-30 (54%).
I'm really anxious about the cost of my energy bills	61%	55%	51%	46%	-5	
The increase in my energy bills is negatively impacting every single area of my life	51%	42%	40%	35%	-5	DE respondents are more likely to agree they are anxious about their energy bills (52%) to 43% of AB respondents, and 45% C1C2.
There is no point in contacting my energy supplier about my energy bills as I don't think there is any help available	44%	42%	40%	38%	-2	
I know how much energy different appliances use and therefore how I need to use my appliances differently to save money on my energy bills	56%	56%	52%	51%	-1	Those who work for micro businesses are more likely to agree (33%) that there is no point of contacting energy suppliers for their help with energy bills than those who work for small and medium businesses (45% and 47% respectively).
I avoid media coverage about the energy crisis as it is all doom and gloom with no practical help	46%	44%	39%	35%	-4	
I feel totally powerless when it comes to trying to reduce my energy bills	45%	39%	38%	36%	-2	

Public Quant Survey Wave 1 2023: Here are some statements that people have made recently about life in the UK. To what extent do you agree with these statements? Base: All public (2,080)
 Public Quant Survey Wave 3 2023: Here are some statements that people have made recently about life in the UK. To what extent do you agree with these statements? Base: All public (2,124)
 Public Quant Survey Wave 1 2024: Here are some statements that people have made recently about life in the UK. To what extent do you agree with these statements? Base: All public (2,085)
 Public Quant Survey 2025: Here are some statements that people have made recently about life in the UK. To what extent do you agree with these statements? Base: All public (2,073)

Statements about life in the UK today (all respondents)

	Net: Agree				Percentage point change	Statistically significant differences
	May 23	Nov 23	June 24	Sept 25		
I know where to go for information and support for reducing my energy bills	51%	48%	48%	45%	-3	Those who work for micro businesses are less likely to agree (8%) that the Government are doing all they can to help people during the energy crisis – agreement with this statement increases alongside with business size (15% small businesses, 26% medium businesses). Those who work for micro businesses are significantly less likely to agree (8%) that the energy industry has supported customers as much as possible in response to energy crisis, in comparison to those who work for small and medium businesses (27% and 32%, respectively).
I think the Government are doing all they can to help people during the energy crisis	26%	20%	17%	13%	-4	
When it comes to the energy crisis, the energy industry has supported customers as much as possible in a very difficult situation	21%	20%	19%	17%	-2	

Public Quant Survey Wave 1 2023: Here are some statements that people have made recently about life in the UK. To what extent do you agree with these statements? Base: All public (2,080)
 Public Quant Survey Wave 3 2023: Here are some statements that people have made recently about life in the UK. To what extent do you agree with these statements? Base: All public (2,124)
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 Public Quant Survey 2025: Here are some statements that people have made recently about life in the UK. To what extent do you agree with these statements? Base: All public (2,073)

Energy behaviours in response to cost-of-living (all respondents)

	% Answered yes				Percentage point change	Statistically significant differences
	May 23	Nov 23	June 24	Sept 25		
Using my smart meter more often so I can monitor how much energy I use	39%	35%	35%	34%	-1	Respondents aged 31+ are more likely to invest in boiler care (29%) than those aged 18-30 (19%). Those who work for larger businesses are also more likely to invest in this option; 28% medium, 30% small, and 16% micro businesses.
Making home improvements to make my home more energy efficient e.g. loft insulation	30%	27%	22%	23%	+1	
Investing in boiler care to keep my appliances well maintained and working efficiently	28%	26%	27%	27%	0	
Starting to use my savings to pay my heating bill	27%	23%	22%	19%	-3	Those who work for micro businesses are less likely to use their savings to pay for heating bills (16%) than small and medium businesses (24% and 25% respectively).
Stopped looking into energy efficiency for my home as it's too expensive	26%	23%	25%	-	-	
Starting to use electric space heaters instead of turning on my boiler	17%	17%	13%	14%	+1	
Postponing changing my boiler which needs replacing	15%	12%	10%	10%	0	Respondents aged 18-30 are more likely to borrow or lend money to support paying energy (20%) than respondents aged 31+ (7%).
Borrowing or lending money to friends and family to support paying energy bills	14%	12%	12%	10%	-2	
Cancelling or postponing my annual service check for my boiler /central heating system	14%	12%	11%	10%	-1	

Public Quant Survey Wave 1 2023: Are you doing any of the actions below, this year, in response to the increase pressure of cost-of-living? Base: All public (2,080)

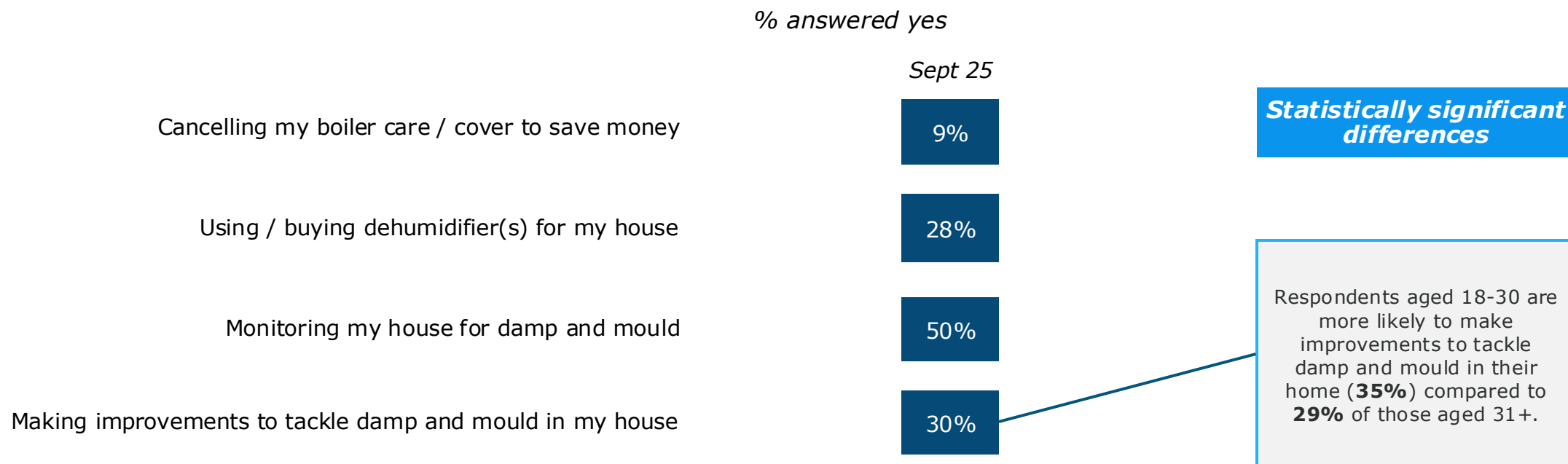
Public Quant Survey Wave 3 2023: Are you doing any of the actions below, this year, in response to the increase pressure of cost-of-living? Base: All public (2,124)

Public Quant Survey Wave 1 2024: Are you doing any of the actions below, this year, in response to the increase pressure of cost-of-living? Base: All public (2,085)

Public Quant Survey 2025: Are you doing any of the actions below, this year, in response to the increase pressure of cost-of-living? Base: All public (2,073)

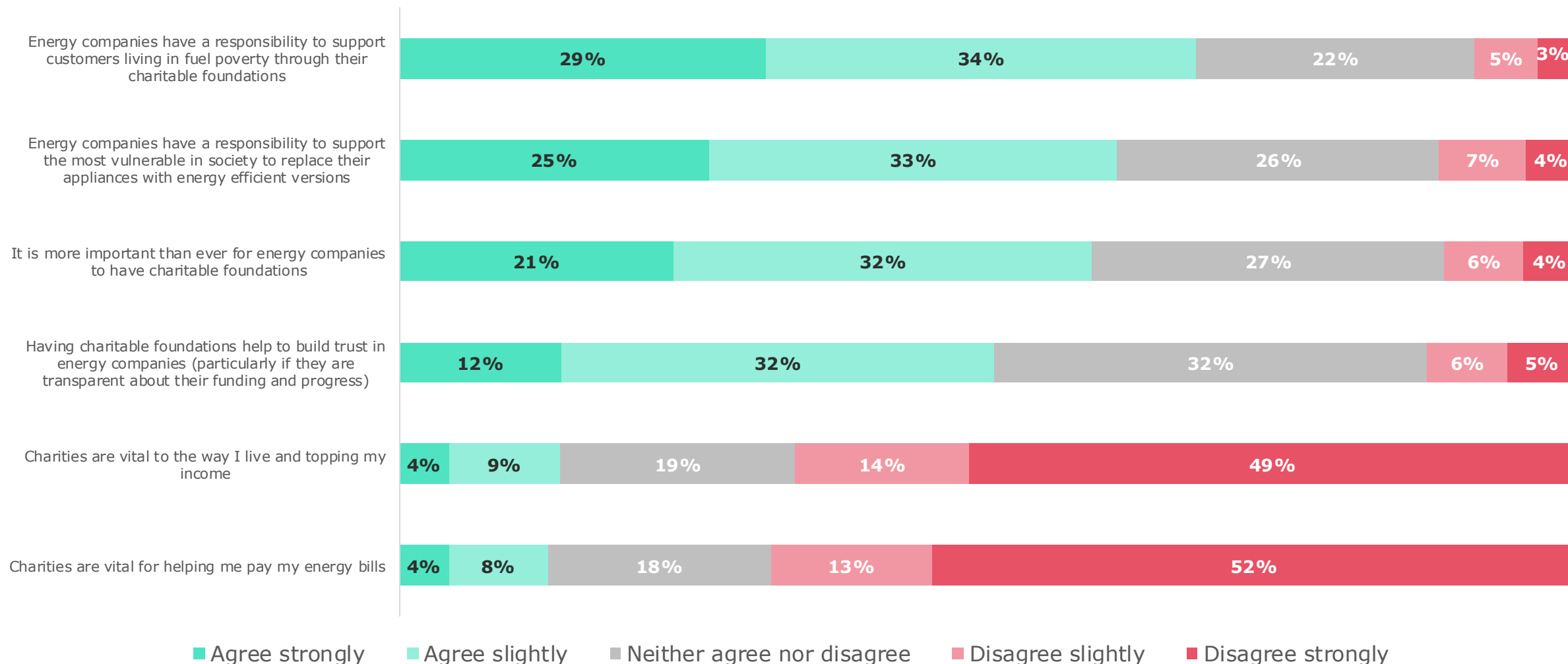
Energy behaviours in response to cost-of-living (all respondents)

Appendix



Views towards the role of charities and charitable foundations

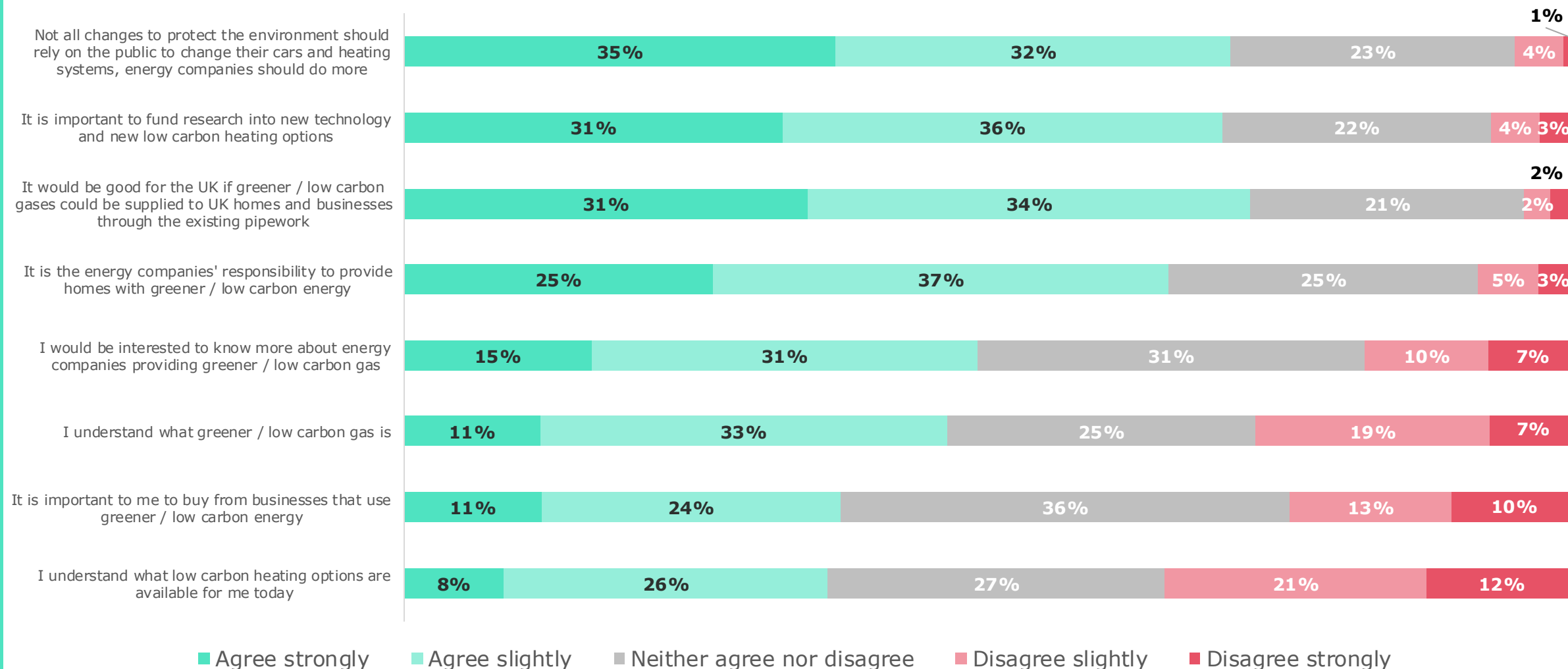
Appendix



Q7. Here are some statements people have made about the role of charities and charitable foundations. To what extent do you agree with these statements? (n=2,073)

Attitudes towards greener / low carbon energy

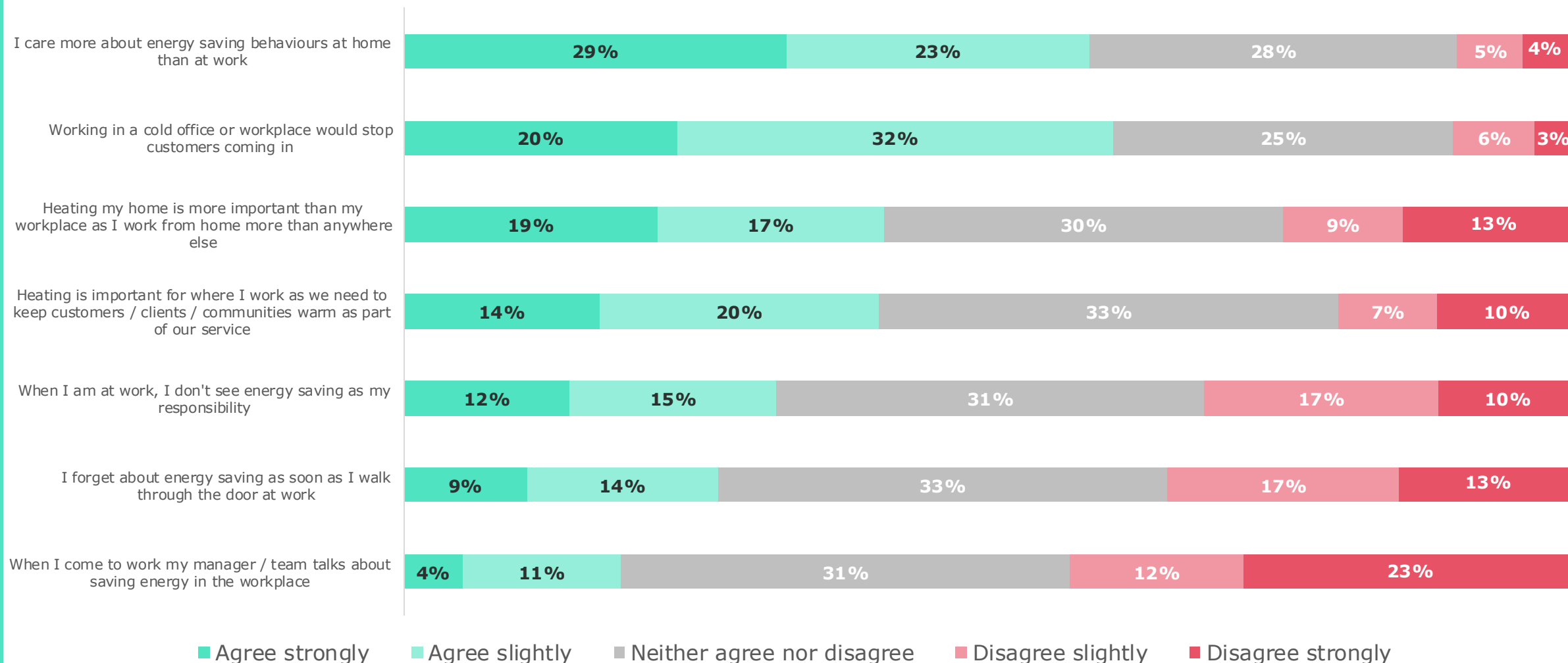
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Q8. Here are some questions about greener / low carbon energy. To what extent do you agree with these statements? Base: All respondents (n=2,073)

Attitudes towards energy behaviours at work versus at home

Appendix



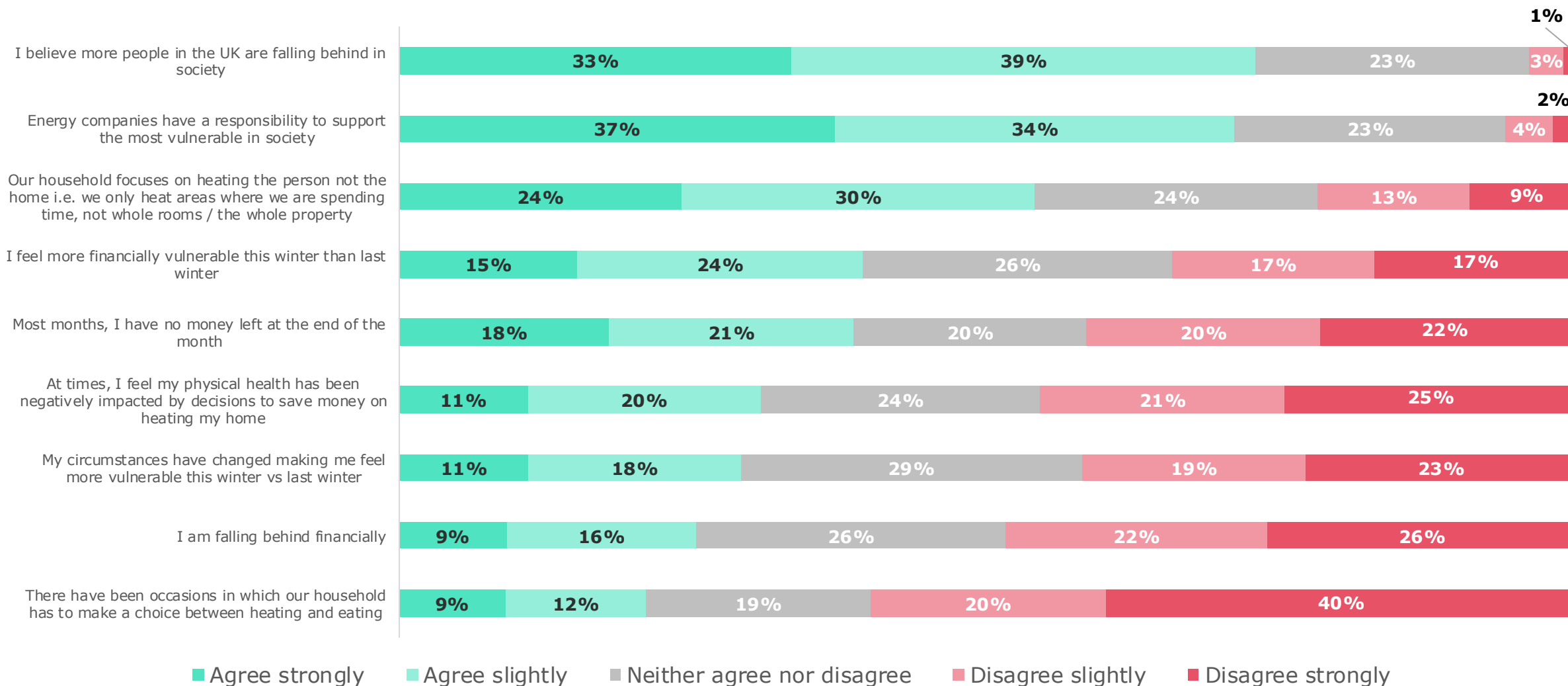
Q9. Here are some statements people have made about energy behaviours at work vs at home. To what extent do you agree with these statements? Base: All respondents (n=2,073)

Attitudes towards household heating

	Net: Agree		Percentage point change	Statistically significant differences
	June 24	Sept 25		
I am concerned that for some people, heating has become a luxury rather than a basic service	77%	78%	+1	Older respondents of 31+ are more likely (75%) to agree that they feel more concerned about some households going cold over winter due to the price of heating, than younger respondents of 18-30 (63%).
I am concerned about some households going cold over winter due to the price of heating	74%	73%	-1	
I think it is important to reduce waste in the energy system so more of the gas produced can be used to heat homes	70%	72%	+1	DE respondents are more likely to agree they are anxious about their energy bills (53%) to 63% of AB respondents, and 56% C1C2.
I see heating as a key part of my energy bill, and try to reduce how much heating I use to save costs	72%	72%	0	
I think it is important that we have more choice on heating options in the future vs what is available today	71%	70%	-1	Those who work for micro businesses are significantly less likely (49%) to know about the changes that could be made to heating to save money than those who work for small and medium businesses (57% and 60% respectively).
I am aware of the different options available to me for heating my home	60%	57%	-3	
I am aware of changes I could make to my heating to save money	55%	57%	+2	Those who work for micro businesses are significantly less likely to agree (14%) that they feel positive about heating bills becoming more affordable in the future than those who work for small and medium businesses (32% and 38% respectively).
I am aware of changes I could make to my heating to save energy / be more sustainable	55%	55%	0	
I feel positive that heating bills will become more affordable in the near future, and then I will be able to focus on sustainability	28%	21%	-7	

Views on paying for household bills

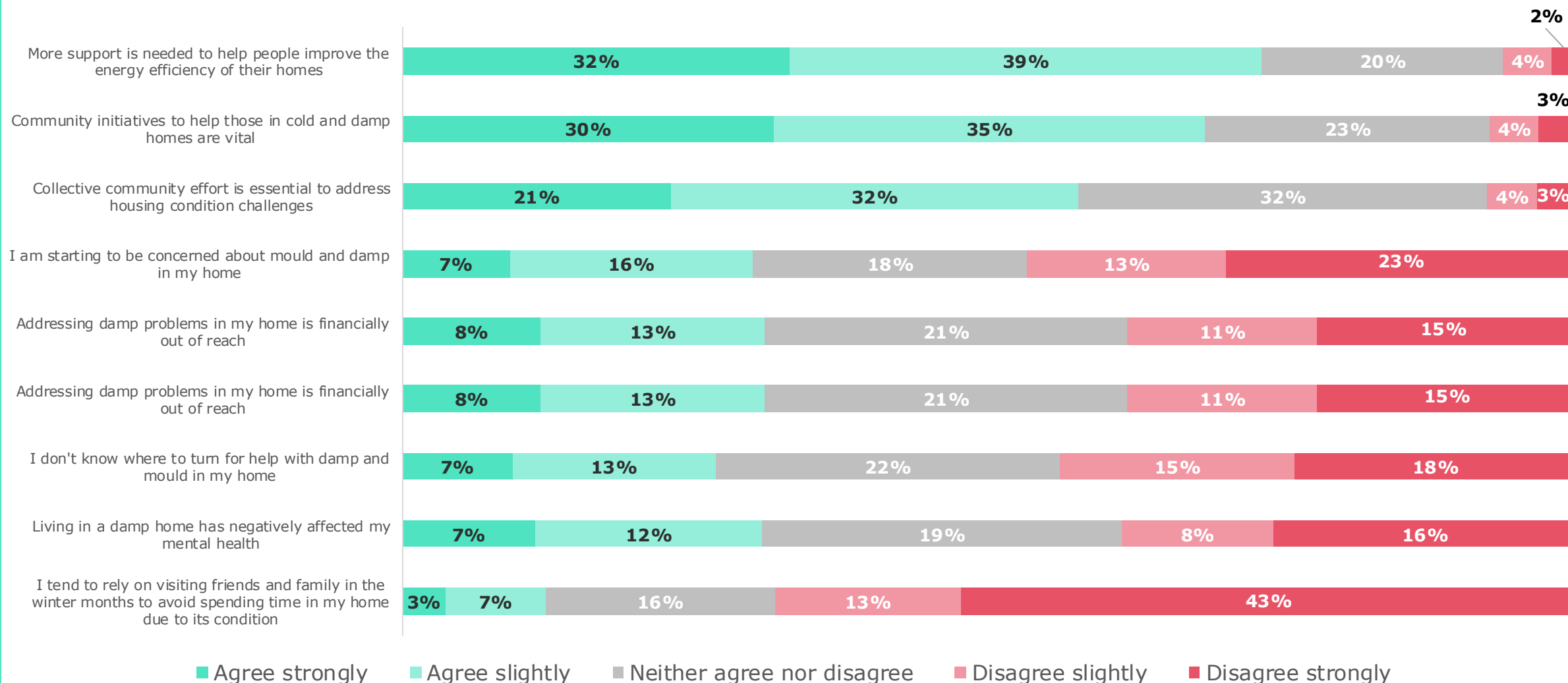
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Q11. Here are some statements people have said about paying for household bills. To what extent do you agree with these statements? Base: All respondents (n=2,073)

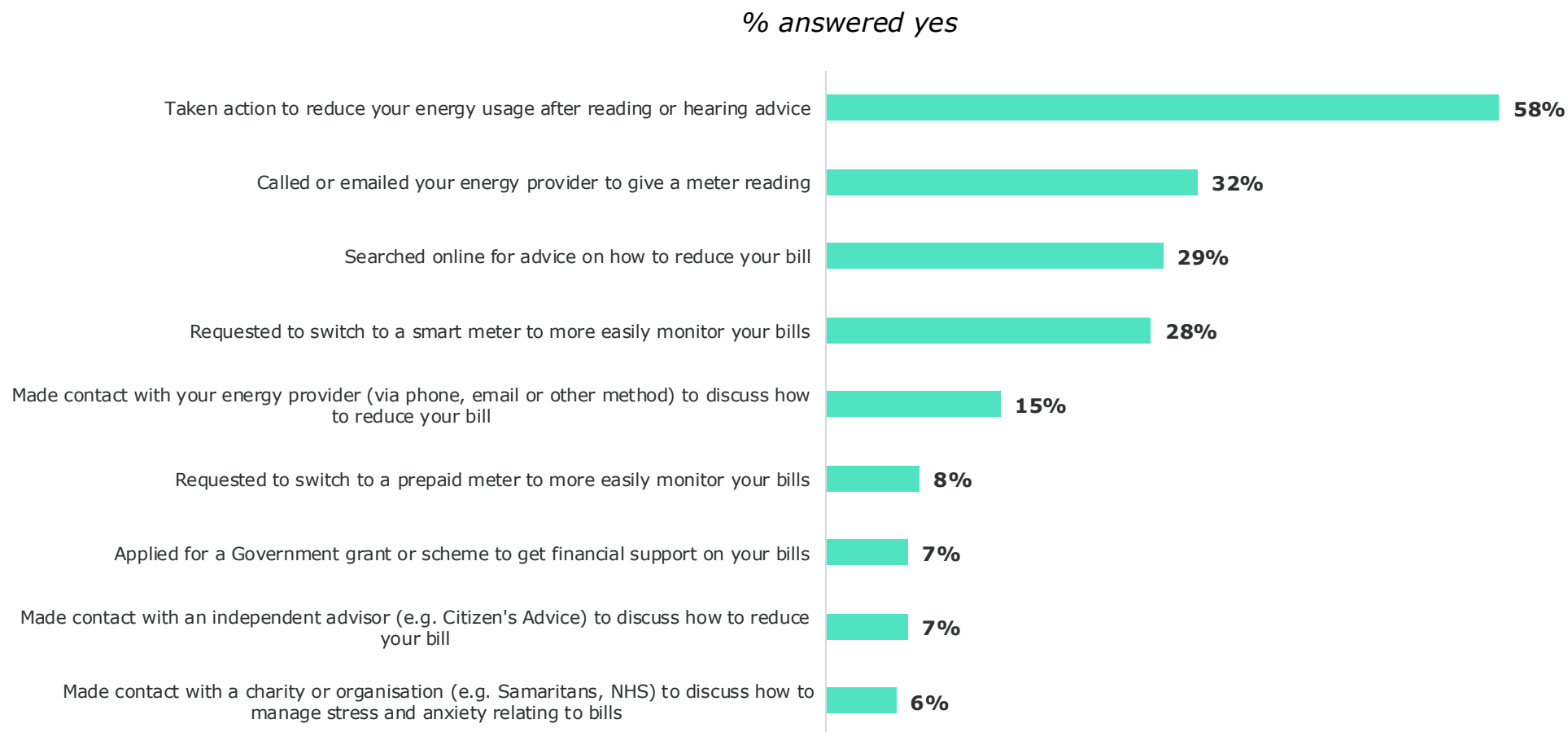
Damp and mould in homes

Appendix



Q12. Here are some statements specifically about experiencing damp, mould or excessive cold in homes. To what extent do you agree with these statements? Base: All respondents (n=2,073)

Actions to manage energy bills



Q13. Here are some actions that you may have taken in relation to managing your energy use or bills. Which, if any, of these actions have you taken?? Base: All respondents (n=2,073)