

Unlocking the Net Zero Home: The Net Zero Action Rankings 2024 Report



British Gas

Foreword



Our lives depend on energy. We use it to travel, to cook, to keep ourselves warm. But with 26% of UK carbon emissions coming from home heating and personal transport¹, the challenge to reach Net Zero starts at home.

Our energy landscape is already in transition – becoming renewable, electrified and digital. But with this transformation, what households will want and need will broadly remain the same. When they flick the switch, they expect the lights to come on. When they run a bath, they expect it to be hot. And with 8 in 10 homeowners willing to make changes to their own home to tackle climate change, how can we make the transition as simple and affordable for everyone?

British Gas gives millions of households around the country the confidence to make the right energy choices. And Hive's unique eco-technologies give customers control over their energy. Together we provide the technology, services, tariffs, offers, support, advice and expertise to help homes achieve net zero.

Reaching Net zero will be a collaborative effort among businesses like us, Government, NGOs – and homeowners.

That's why, for the third year running, we are measuring Britain's attitudes to technology that will help green their homes. Our net zero Action Rankings show us which household energy technologies are most likely to be adopted, and where people need more support to take up low carbon measures.

One of our main takeaways this year is that at a

time when positive attitudes towards installing green technologies should be steadily ramping up over time to meet net zero targets, they have largely remained constant over the past three years. This dial must be shifted if fast approaching statutory targets and the new Government's pledge to upgrade 5 million homes over the next four years are to be delivered on.

The good news? There is strong support for net zero and homeowners are willing to make changes to their home to help the country tackle climate change. Homeowners need help to turn their enthusiasm into tangible action through simplified Government grant schemes

British Gas and Hive have already installed more than 3 million smart energy measures around the UK. But we want to go further, faster. The challenge for everyone concerned—Governments, NGOs, and businesses—is to help Britain's homeowners understand the technologies that in the future will make them better off, give them greener homes, and increase Britain's energy security.

We hope you enjoy the report, and we're glad to have you along on our journey towards net zero.

Dan Rosenfield

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Executive Summary



Welcome to the third year of our British Gas Net Zero Homes Tracker. We've interviewed over four thousand people each year to understand how Britain feels about the journey to net zero as well as the tech helping to decarbonise homes. This research gives us a clear view of changing attitudes over the past three years.

While our research usually takes place in April, given the political significance of this year, we ran a booster survey in July to test how far party pledges during the general election and policy announcements from the new Labour Government, have impacted the public's attitude.

Our polling shows that the public is more optimistic about the new Government's commitment to tackling climate change compared to the previous Conservative Government, as tested in April. A greater proportion of the public think that the Government is committed to the net zero target, with a 10% increase in just 3 months.

Additionally, there is a 16% drop in the proportion of the UK public who think the Government isn't doing enough on climate change.

Our annual research, conducted in April, found that:

While the British public is concerned about climate change, they are increasingly pessimistic about our ability to take action. In Britain today, more than 92% believe that climate change is real. Of those, almost 8 in 10 believe that it is primarily caused by human actions. However, over half (52%) of the public now feel more pessimistic about our ability to respond to climate change, up from 43% since 2022.

The public remains supportive of the Net Zero target, Governments target to reduce the UK's net emissions of gases that cause climate change to zero by 2050. In April this year, for the first time, a majority of people have heard of the UK Government's Net Zero target and understand what it is (53%, up from 45% in 2022), and more than two thirds support the target.

Public confidence in achieving Net zero is low. Fewer than a third are very or somewhat confident that the UK will be Net Zero by 2050 – a figure that has changed very little since 2022. In the 8 months leading up to the poll in April, there were major policy interventions and political debates on Net Zero and green investment from central Government, the Scottish Government and the then-opposition Labour Party. These interventions appear to have had little impact on the public's confidence in its achievability.

However, the British public want to take action to decarbonise their homes. A strong majority of almost 8 in 10 homeowners say that they would be willing to make changes to their own home in order to help the country tackle climate change: this has consistently been the case since we first started measuring in 2022.



Net Zero Action Rankings 2024 - Which technologies do the British public favour?

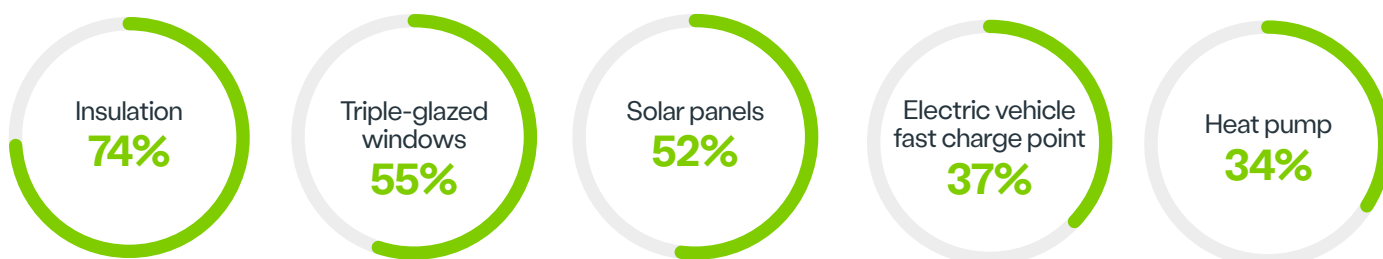
Our Net Zero Action Rankings shine a light on the household energy technologies that are most popular and where extra support is needed. They calculate the percentage of the UK public who report they are willing to install low-carbon tech in the next two years, or who've already jumped on board and installed them.

Our Action Rankings, tracked across three years, show that:

Despite the public's overall willingness to take action and install green upgrades,

worryingly the numbers have remained largely constant over time, rather than increasing as expected.

Installing a heat pump is one of the biggest single actions a household can take to reduce carbon emissions² - and 1 in 10 British homes need to install a heat pump in the next four years in order for the UK to meet its carbon targets - and yet it is the least popular technology. Heat pumps ranking last indicates that more needs to be done to persuade homeowners to make the switch.



²Nesta. One in ten households need to install a heat pump during life of this Parliament to meet UK's climate obligations. July 2024



One of the main hurdles is that people aren't convinced of the cost-benefit to making the upgrades and want more tailored information. Many of the concerns homeowners have centre around a lack of knowledge - for example, what the impact of an installation will be on their energy bills, what technologies are suited to their home, and if they are eligible for Government grants. In the report, we delve into these for each technology.

The new Government will need to work hard if they are to change these perceptions and deliver on their manifesto pledge of upgrading 5 million homes by the end of Parliament³ -

improving information and building the public's confidence in the deliverability of the policy objective are vital.

We'll keep tracking these attitudes yearly to see how they evolve as the UK moves towards net zero. Are homeowners getting more familiar with and open to installing low-carbon products? Is awareness of net zero and climate change on the rise? And with inflation continuing to impact households budgets, will optimism about achieving net zero and its benefits hold steady? These are just some of the themes that we'll explore in the following chapters.

The public is more optimistic about the new Government's commitment to tackling climate change compared to the previous Conservative Government.

Although the survey runs April - April each year, given the political significance of this year, it was appropriate to track how public attitudes towards net zero and Government action on climate has changed since the 2024 General Election was called and a new Labour Government came into power. An extra poll was run to compare the British public's attitudes in April and July of this year, detailed below.

Following the election campaign and a new Labour Government, a greater proportion of the public think that the Government is committed to the Net Zero target, a 20 percentage point net shift in just three months. Almost half (48%) of respondents agreed that the Government was not really committed to the Net Zero target in April, dropping significantly to around a third (34%) of respondents in July.

This shift is particularly strong among older respondents. Among 65+ year olds, there is a 16% decrease since April of this year in their belief that the Government is not committed to the target, compared with just a 4% shift for 18-24 year olds.

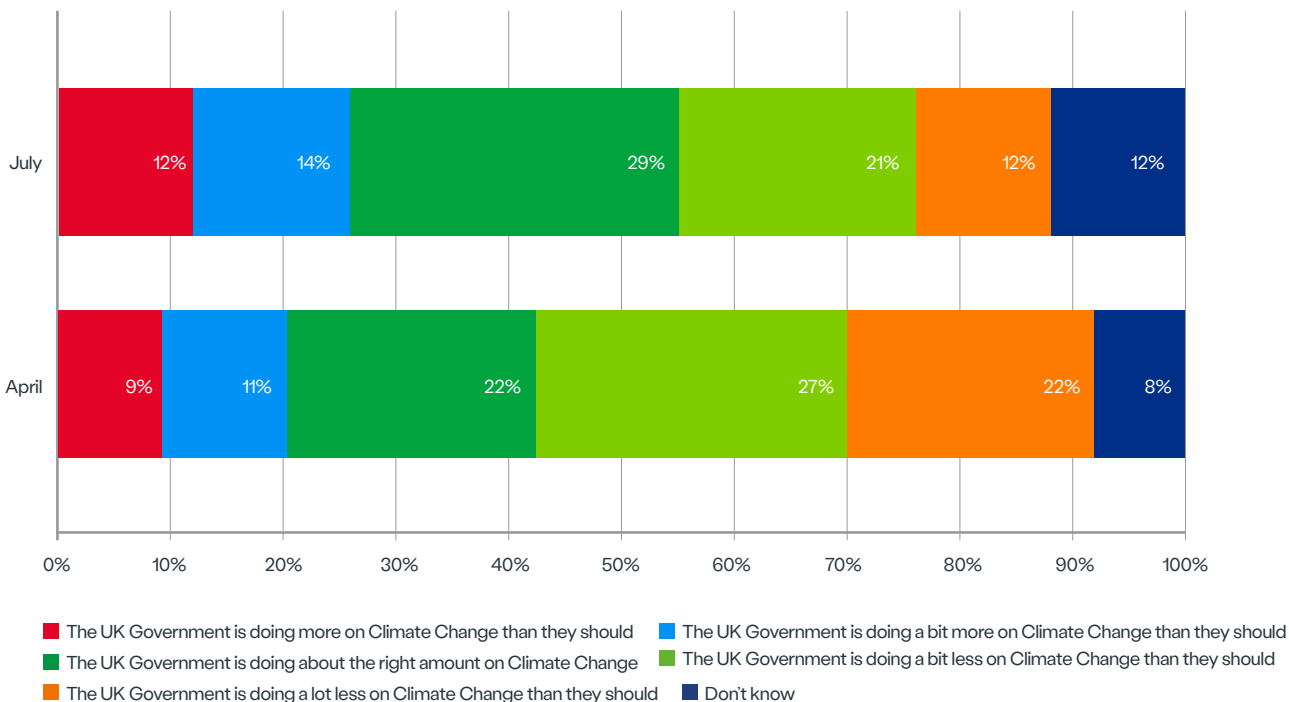
The public is much more positive that the new Labour Government is taking action on climate change compared to the previous Conservative Government in April. There is a 16 percentage point drop in the UK public who think the Government isn't doing enough on climate change - which is significant - and a corresponding increase in the number that think Government is doing 'about the right amount' (+7%), 'too much' (+5%) and 'don't know' (+4%).

The rest of the report focuses on the findings from our annual survey which took place in April 2024.

Figure 1 - Belief that the Government is taking enough action on climate change (April - July 2024)

Which of the following comes closest to your view?

Public First | UK Adults | Sample Size: 2,011 respondents (July), 4,016 respondents (April) | Fieldwork 4-14 April and 19-24 July





The Impact of Climate Change

This year, we've seen extreme weather events like heatwaves in India, wildfires in Greece and (closer to home) a drought in Kent and Sussex, leaving thousands of homes without water and schools forced to close⁴.

Meanwhile, the British public has watched the political debate heat up over the costs of net zero.

Prior to our survey of the public in April this year, there were several high-profile media events which questioned the feasibility and costs of net zero: the then-Prime Minister Rishi Sunak pulled back on home decarbonisation plans, the then-Opposition Labour Party drastically reduced their proposed budget for home upgrades from (up to) £60bn over ten years to £13.2bn this Parliament due to concerns over funding their plans, and the Scottish Government delayed their own net zero target.

The results in this chapter demonstrate that, despite the politicisation of net zero, rising energy bills, and extraordinary weather events of this past year, the public perception of climate change and support for net zero remains largely constant.

In the past twelve months, the British public's awareness of and concern towards climate change has changed very little. While major policy concerns such as the cost of living, healthcare and the state of the economy remain the largest issues for respondents, climate change is still seen as one of the most pressing issues of our time by a majority (57%) of people, consistent with our findings last year.

Our research shows that the public is still very supportive of the net zero goal and wants more action from the Government and businesses. However, even with this support, there is a lack of confidence that the UK will hit the net zero target by 2050. This year, public confidence in meeting the target hasn't changed much.

While it's good news that confidence hasn't dropped, especially given the political and media focus on net zero this past year, homeowners need clearer guidance and strong Government leadership on what's next for British homes to feel motivated to make changes themselves.

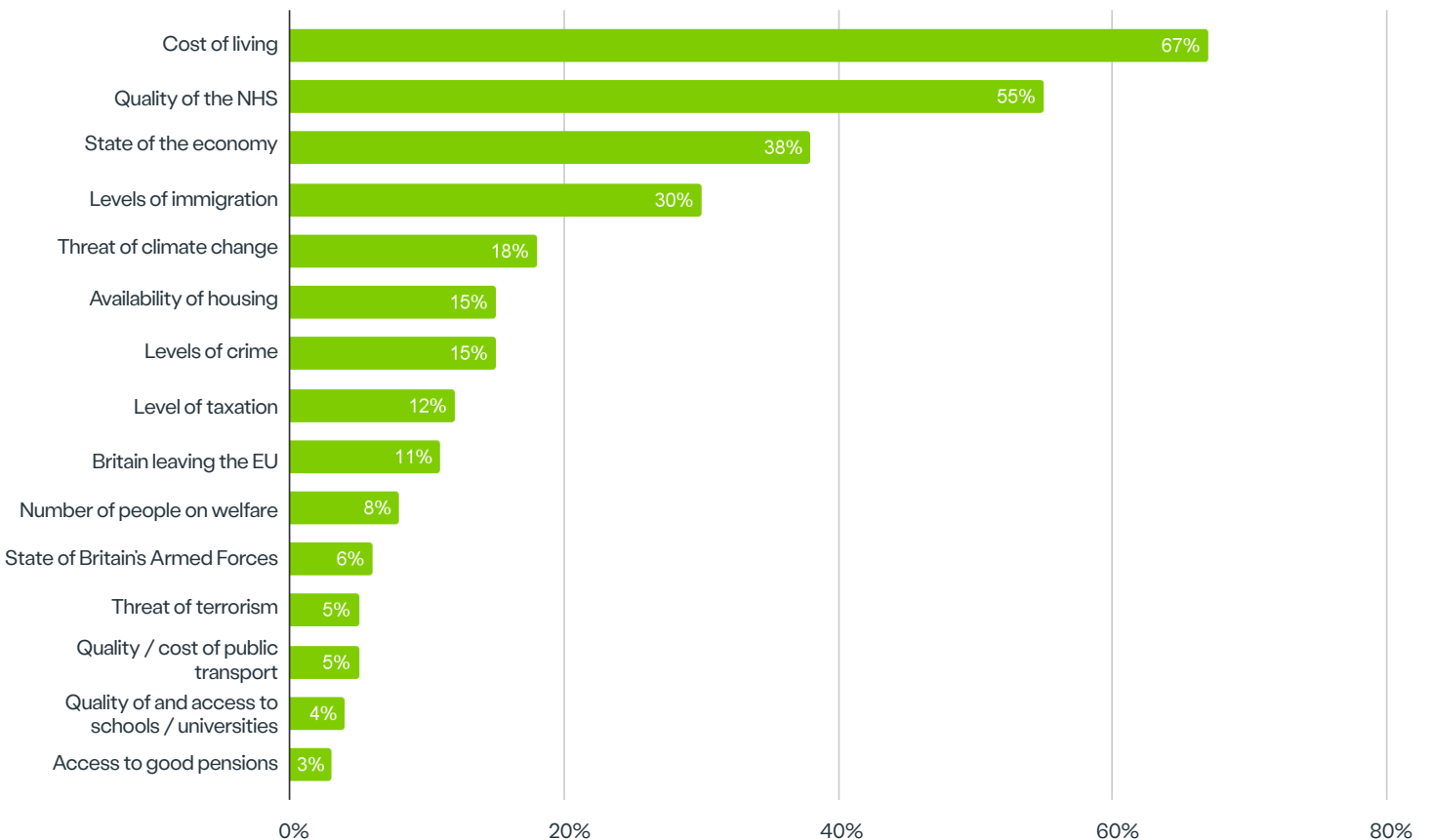
Public Awareness of and concern towards climate change remains high

The third British Gas Net Zero Action Rankings shows that climate change awareness and concern are still sky-high, with strong backing for actions to tackle it head-on.

For the British public, climate change is the fifth most important issue (18%), trailing behind the cost of living (67%), quality of the NHS

(55%), state of the economy (38%), and levels of immigration (30%). Interestingly, climate change ranks higher than other pressing issues like housing (15%), crime (15%), levels of taxation (12%), and Brexit (11%). Contrary to what some might think, our Net Zero Action Rankings shows no significant age differences in how climate change is viewed.

Figure 2 - Most Important Issues Facing the UK (April 2024)



Like last year, 92% believe climate change is real, and 72% believe that human actions, such as pollution, are the primary cause. Of those believing climate change to be real, 85% of respondents said they were concerned about it - with four in ten (38%) saying they were very concerned.

57% of people say that climate change is one of the most pressing issues of our time, an identical figure to 2023, and just 2 percentage points down from 2022. London (62%) leads the country in saying it's one of the most pressing issues of our time, with this dropping to 55% in the East Midlands and 48% in Wales.

Our research finds that awareness of the target has not increased significantly across the past three years.

While the public is concerned, they also worry that other people are not taking sufficient care of the environment. 60% of the public believed that “most people in the UK do not care about the damage they do to the environment”, rising from 54% in 2023. Among younger respondents, we find just over two-thirds of young people aged 18-24 (70%) believe that people in the UK do not care about the damage they do to the environment, again rising from 64% in 2023.

The public is also increasingly pessimistic about their ability to take action. Over half of the public now feel more pessimistic about our ability to respond to climate change (52%). This represents an increase in pessimism year-on-year, a 9% increase since 2022. Those who have become more optimistic (31%) tend to be younger. 38% of 25-34 years olds state they are more optimistic about our ability to respond to climate change than they were a few years ago, compared to 27% of 55-64 and 65+ year olds. Interestingly, those that were intending to vote Liberal Democrat, when polled in April, were the most pessimistic

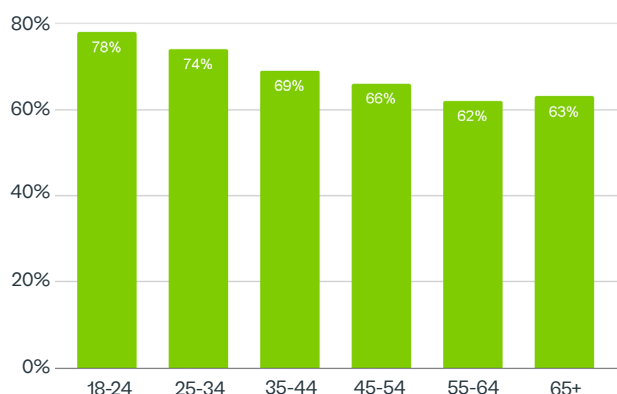
in their ability to respond to climate change (65% were pessimistic), more so than those intending to vote Labour (55%) and even Conservative (40%).

The public remain very supportive of the Net Zero target despite their concerns it is not deliverable

In 2019, the UK Government passed legislation to commit the UK to achieving net zero emissions of greenhouse gases by 2050. The new Labour Government has fully committed to the net zero target - making the decarbonisation of the power system by 2030 one of its core missions. **Our research finds that awareness of the target has not increased significantly across the past 3 years.** Still, for the first time, an absolute majority (53%) of respondents said they understood what the target meant, which is a positive step. 89% of the public said they had heard of this target, which is up 2 percentage points from 2023.

We tested the depth of this knowledge by asking respondents to select the correct definition of “net zero” from a list of options. Just 55% of respondents correctly defined the net zero target, while a further 15% selected a definition that, while incorrect, is broadly similar. One in five (20%) respondents selected incorrect answers, such as “a target to close down all coal and oil power plants in the UK, so that none of the country’s electricity comes from fossil fuels” (5%), or “a target to remove all petrol and diesel vehicles from UK roads, so that no vehicles will release carbon emissions” (7%)

Figure 3 - Support for the Net Zero target, by age group (April 2024)



Once net zero was explained however, we found that support for it is strong and has remained so for the past 3 years. 68% said they supported the net zero target, with only 9% saying they were opposed. Younger people were still more likely to be supportive than older groups, with 78% of 18-24 year olds supportive, compared to 63% of 65+ year olds.

The public isn't confident that the UK will meet its net zero target by 2050. Only 32% of respondents believe the country will hit the target, while 61% are doubtful—unchanged from 2023 and a 7% increase in doubt since 2022. Interestingly, there's been almost no shift in belief about the deliverability of net zero. Among those who lack confidence, 36% think the UK will never achieve net zero, the same as in 2023.

Actions to tackle climate change

The public support the energy transition and building more renewables

The public appreciates that tackling climate change will require us “to radically change how we live our lives” (71%). This still holds across all age groups (70% of 18-24 year olds agreed compared to 72% of those aged 65+).

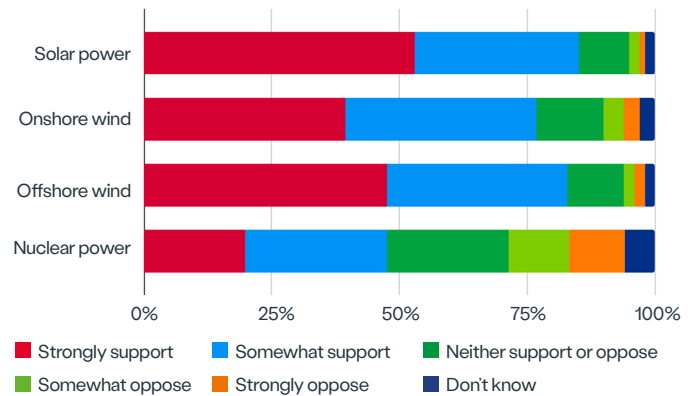
In its first days in power, the new Labour Government lifted the previous Conservative Governments de facto onshore wind ban, and MP Ed Miliband the Secretary of State for the Department for Energy Security and Net zero approved several large solar projects which had been opposed by local communities.

Our polling shows that the public are very supportive of the energy transition and of building more solar and onshore wind generation.

85% of the public support building more solar power, with just 3% opposed - citing the perceived unreliability of energy supply, aesthetic impact, and the prohibitive cost as the main reasons for this opposition. 76% of the public support building more onshore wind, with just 7% saying they were opposed. This was broadly similar to our findings in both 2022 and 2023. Support for building more onshore wind is broadly consistent across age groups and different social grades.

As expected, nuclear power has the lowest overall support among low-carbon energy sources. Only 48% of respondents back the construction of new nuclear power plants, while 22% are against it. Interestingly, there's a U-shaped age trend: support is lowest among middle-aged respondents, but highest among both the 65+ and 18-24 age groups.

Figure 4 – Support for constructing more of the following electricity generation types (April 2024)



Responsibility for tackling climate change

The public think that UK Government is most responsible for tackling climate change and should be doing more

The public holds the national Government as **most responsible** for tackling climate change, followed by international bodies, such as the UN, and large businesses. This is consistent with last year.

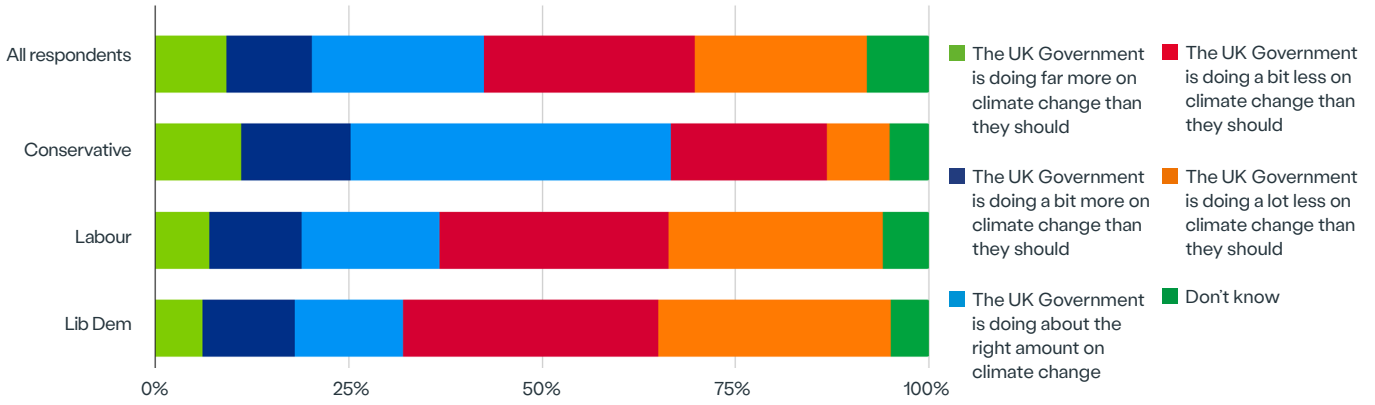
The public believes that the UK Government should be doing more to tackle climate change. In April almost half (49%) thought the then-Conservative Government was doing too little, compared to 22% that thought the Government was doing the right amount on climate change, and 21% that thought the Government was doing too much.

Unsurprisingly, there is a variation among voter groups - with those intending to vote for the Conservative Party in April much less likely to say that the Government is not doing enough on climate change. Despite party debates on climate policy, Conservative voters in April 2024 still weren't much more likely to think the Government is overdoing it on climate change.

Following the general election, polling conducted in July found that the public is more positive that the new Labour Government is taking action on climate change compared to the previous Conservative Government, with a decline of 16 percentage points in the proportion of the UK public who think the Government is not doing enough on climate change [See pg. 6-7 for results from our post-election July 2024 polling].

Businesses are also seen as not pulling their weight in tackling climate change. 52% of the public thought businesses were doing too little on climate change than they should, compared with 17% who thought they were doing the right amount and 17% who believed businesses were doing too much on climate change.

Figure 5 – Belief that the Government should be doing more on climate change, by vote intention (April 2024)



Opening the door to Britain's homes



As we get closer to our statutory net zero and fuel poverty targets, the British public needs to be enabled to make changes in reducing their own emissions, starting with their home.

Six million UK homes live in fuel poverty⁵, and 26% of the UK's carbon emissions come from heating and personal transport⁶. Solutions include upgrading Britain's existing housing stock (8 million homes are currently below EPC C)⁷, switching to electric vehicles and public transport, and installing low-carbon heating options like heat pumps. Making this energy transition happen depends on new technologies being made simple and affordable. This section explores how people feel about decarbonisation, their willingness to act, and the barriers they face.

We find that attitudes towards installing green technologies in our homes are changing, with the British public increasingly realising the importance of decarbonising their home.



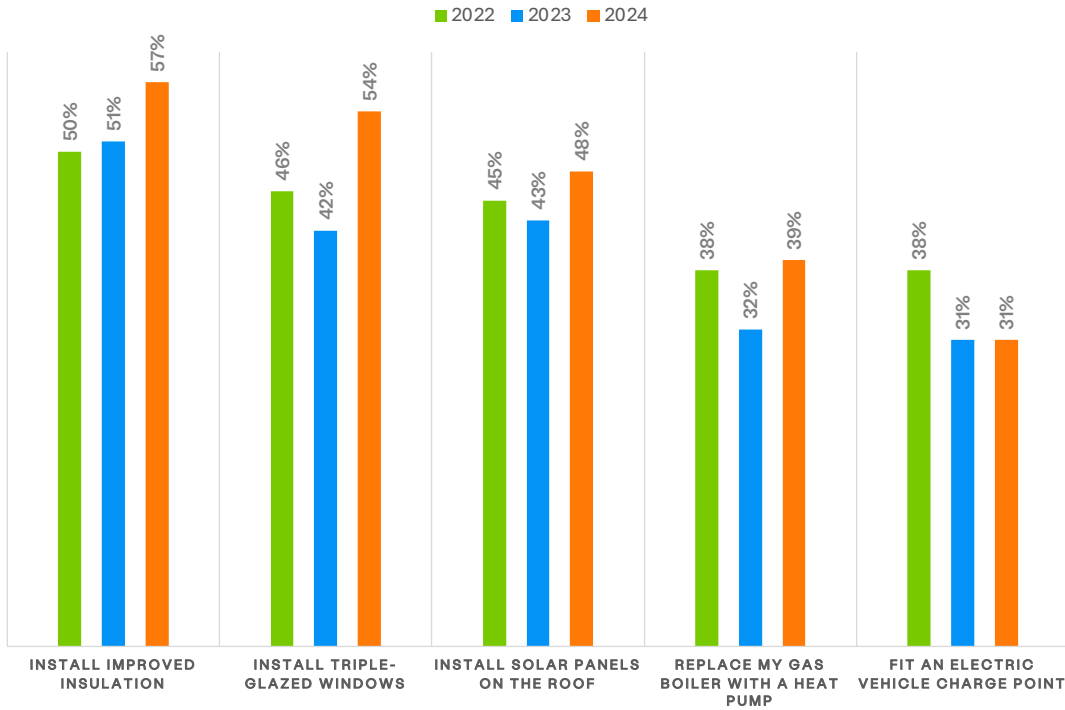
⁵Institute of Health Equity, Fuel poverty, cold homes and health inequalities in the UK, June 2023

⁶ONS, Climate Change Insights, August 2022

⁷ONS, Who lives in homes that are hard to warm? December 2023

As the chart below shows, there has been a slight increase over these past three years, and across all technologies, in the public's belief that it is important for them to install green upgrades in their home.

Figure 6 - Perceived Importance of Installing Technologies Over Time (2022 - 2024, April)



79% of the public say that they are willing to make changes in their own homes to tackle climate change, unchanged from the previous round of polling. However, we see a clear age trend here, with 87% of those aged 18-24 being willing to make changes at home compared to 73% of 65+ year-olds.

This year, we've measured the Net Zero Action Rankings, a calculation of the percentage of people who have or are ready to install low-carbon tech in the next two years. The Action Rankings below show that although the public is willing to install technologies, there are significant differences in their appeal. Insulation is the most popular green upgrade (74%), closely followed by triple glazing (55%). Heat pumps are the green improvement with the lowest action ranking (34%).

2024 Action Rankings
Which technologies do the British public have the greatest appetite to install?

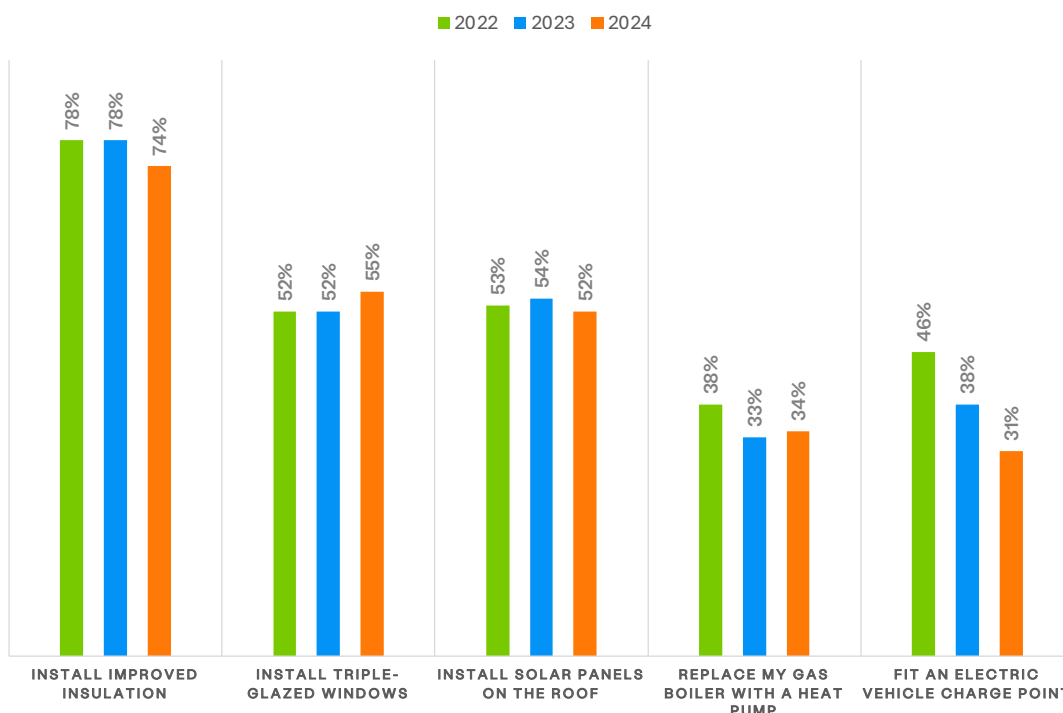
Ranking	Technology	10-Year Action Score	2-Year Action Score
1	Insulation	80%	74%
2	Triple-glazed windows	63%	55%
3	Solar panels	58%	52%
4	Heat pump	45%	34%
5	EV charge point	45%	37%

Most interestingly, when tracked across the past 3 years in the graph below, **willingness to install technologies has remained largely constant despite the public increasingly thinking it is important for them to take action.** This is because significant barriers and a lack of incentives hold homeowners back. Notably, the only technology that has experienced a decline

in the public's willingness to install it across the past 3 years is an electric vehicle car charging point.

In the next few sections we unpick these barriers for each technology to understand what the Government and industry can do to empower homeowners to decarbonise their homes.

Figure 7 - Technologies by two-year action score from 2022 to 2024 (April)



1. Attitudes towards installing home insulation

The energy crisis has highlighted the importance of not wasting energy and the need for the UK's housing stock to become better insulated. The UK has the oldest and among the most draughty housing in Europe⁸. Compared to last year's audit, the UK is now through the worst of the energy crisis. However, energy bills will continue to be high for the next several years if not longer - and homeowners will continue to see inflation cut into their household budgets.

Despite more homeowners believing that it is important to install insulation in their home (67% of the public, an increase of 16% from 2022), we find that the public's sense of urgency has declined. In 2023, 25% believed

that improved insulation was **essential** (and 27% in 2022), this declined to 16% this year which shows that the reduction in energy bills may have reduced the public's sense of urgency.

There is a strong appetite from homeowners to install insulation, more than for any other technology that we tested. 49% of homeowners said they were willing to install improved insulation in the next two years (up 2 percentage points from 2023), with only 11% saying they were not willing to install improved insulation over that time frame. When asked the same question over a **ten year** time frame, we see willingness increases by 10% to 58%.

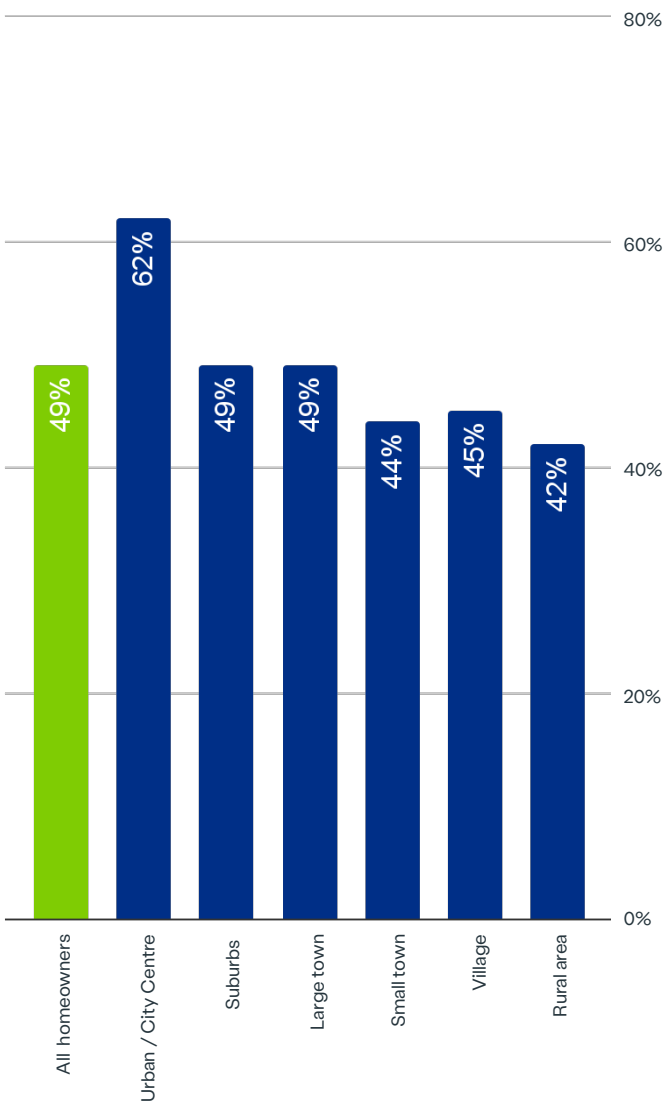
⁸ ISHE, Left Out in the Cold: The Hidden Impact of Cold Homes, Feb 2024

74%

of those able to do so are willing to or have already installed insulation

Rural members of the public are less willing to install insulation.

Figure 8 - Share of respondents willing to install insulation in the next 2 years (April 2024).



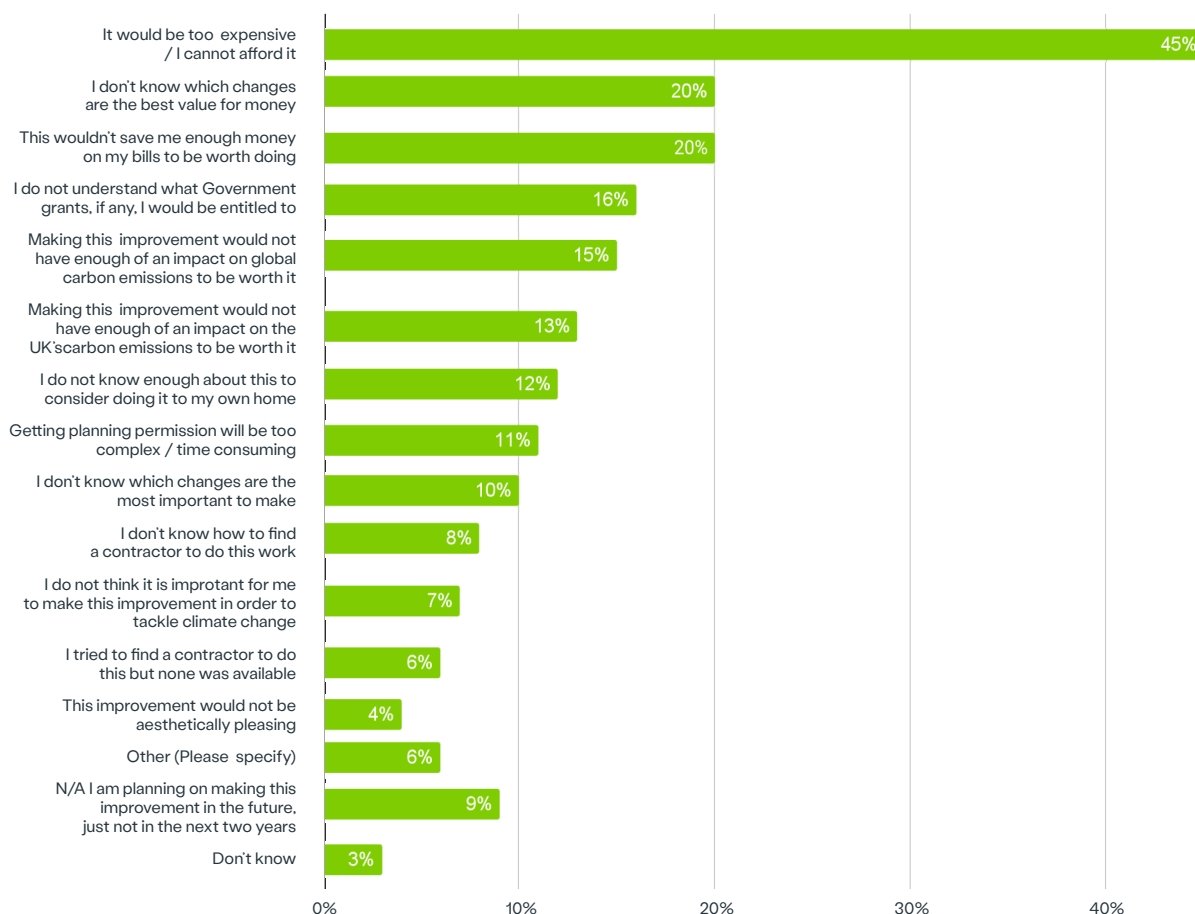
We found a 20-point difference in willingness to install improved insulation between homeowners in urban areas and those in rural areas. With the exception of age, this was the most substantial range among all of the demographic groups we studied for this improvement. This difference is likely

because of the income differential between urban and rural areas, meaning the upfront cost of insulation is a greater barrier for rural homeowners.

When it comes to turning enthusiasm into action, the main hurdle is that people aren't convinced about the cost-benefit of making upgrades. Homeowners hesitant to take action are primarily worried about installation costs (45%), lack of information on which changes represent the best value-for-money (20%), and doubts that the savings on their energy bills would justify the expense (20%).



Figure 9 - Barriers to the public installing improved insulation (April 2024).



2. Attitudes towards installing solar panels

Solar panels are an important way homeowners can help to decarbonise their homes and reduce the burden on the UK's grid, which is critical to meeting the demands of electrifying our homes, businesses, and vehicles. Increasingly, consumers are able to generate electricity for their own use, store it in batteries, and even sell it back to the grid at a profit at times of higher demand.

In this report, we see a clear increase in the perceived importance of installing solar panels. We asked homeowners how important they felt it was to install solar panels on a scale from 1 - not at all important, to 10 – essential. 59% of respondents said it was important to install solar panels, with 12% saying it was essential.

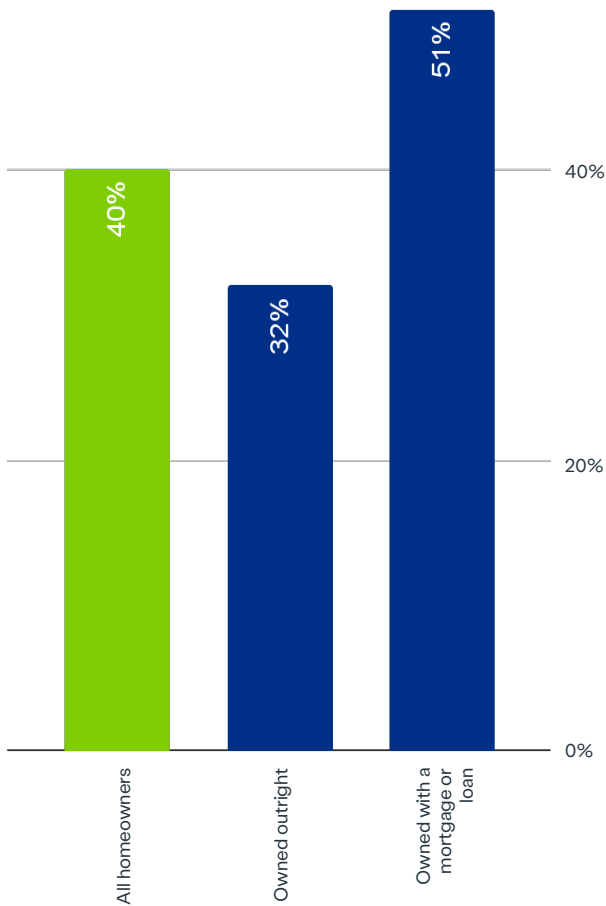
Compared to last year's report, when 43% thought it was important to install solar

panels, this represents a 16% increase in the perceived importance of this action.

Homeowners are more open to installing solar panels in the next 10 years - the challenge is to incentivise them to take action sooner rather than later. Among homeowners, 40% said they were willing to install solar panels on their roof in the next 2 years (broadly the same as 2022 and 2023), with around a quarter (26%) saying they were not willing to install solar panels over that timeframe. When we asked respondents how willing they would be to install solar panels over a ten year timeframe, we see willingness increases to 45%, with 21% not willing to do so. These homeowners' reservations centred around the cost-benefit: (62%) thought solar panels were too expensive and 25% were unconvinced it would save enough money on their bills (25%).

Results defy expectations for the type of homeowners willing to install solar panels

Figure 10 - Share of respondents willing to install solar panels in the next 2 years (April 2024).



Homeowners who don't have a mortgage tend to find it easier to finance big upgrades to their home. However, looking at willingness to install solar panels within the next 2 years, we find that homeowners who do not have a mortgage are **less willing** to install solar panels than those who own their house with a mortgage or a loan, challenging our expectations.

This difference is partly driven by a higher share of owner-occupiers who say they have already installed solar panels or who say that solar panels would not be viable in their house.

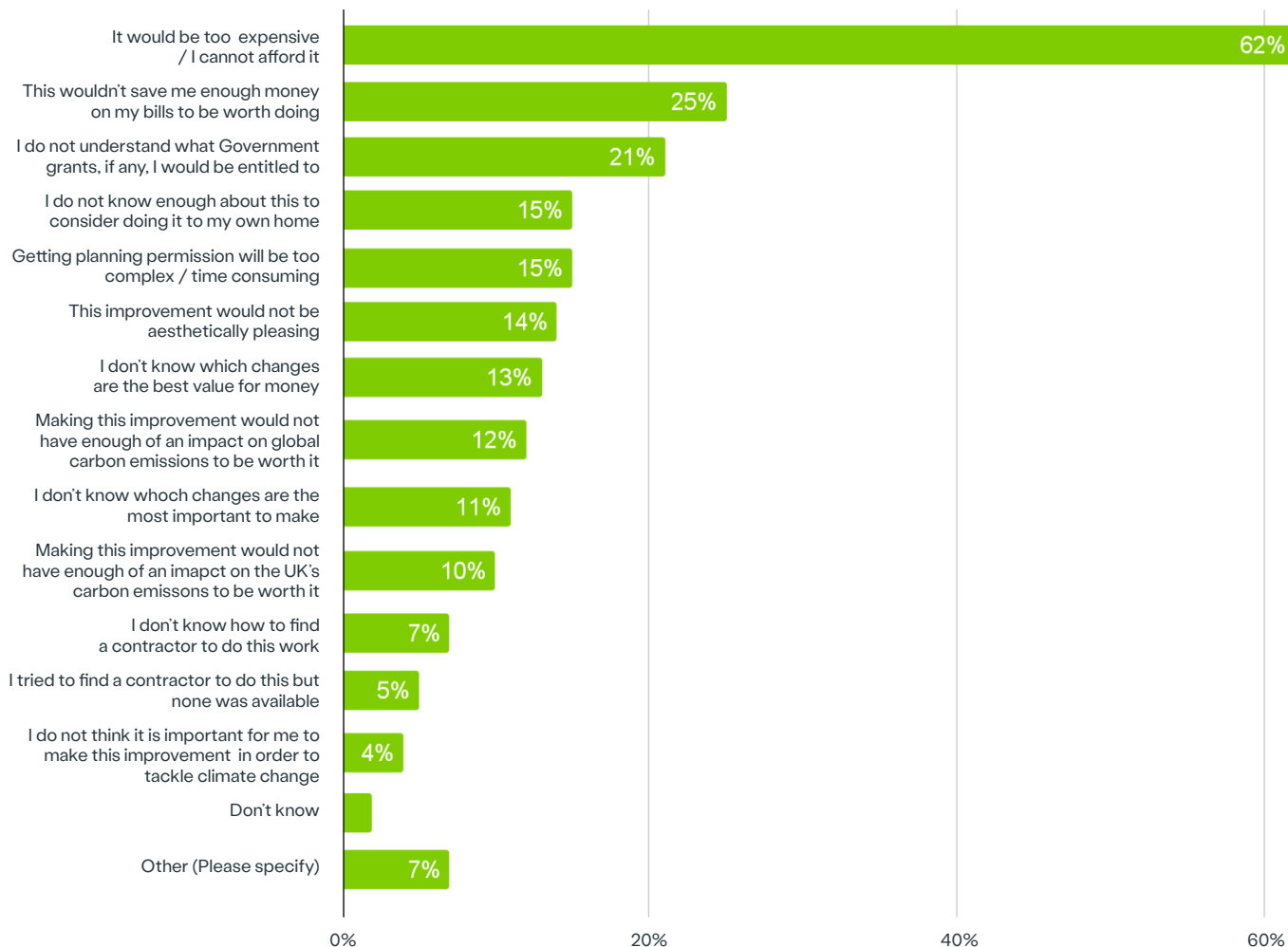
To motivate homeowners to install solar panels, we need to tackle the key barriers to doing so. The main concern is the cost of installation (62%), followed by worries that the up-front expense won't lead to enough savings on energy bills (25%) and confusion over available Government grants (21%).

52%

of those able to do so are willing to or have already installed solar panels



Figure 11 - Barriers to the public installing solar panels (April 2024).



3. Attitudes towards installing heat pumps

The main source of emissions from British homes is the use of natural gas for heating and cooking. With 85% of homes connected to the gas grid and around 23 million using gas boilers, this is a significant challenge. However, in most net zero scenarios, British homes will need to transition from gas boilers to heat pumps and, in some cases, shared heat networks over the next two decades.

Heat pumps are typically electrically driven devices that efficiently extract heat from the air, ground, or water.

In October of 2023, the Government increased the grant for a heat pump in England and Wales from £5,000 to £7,500 - which led to a 40% increase in

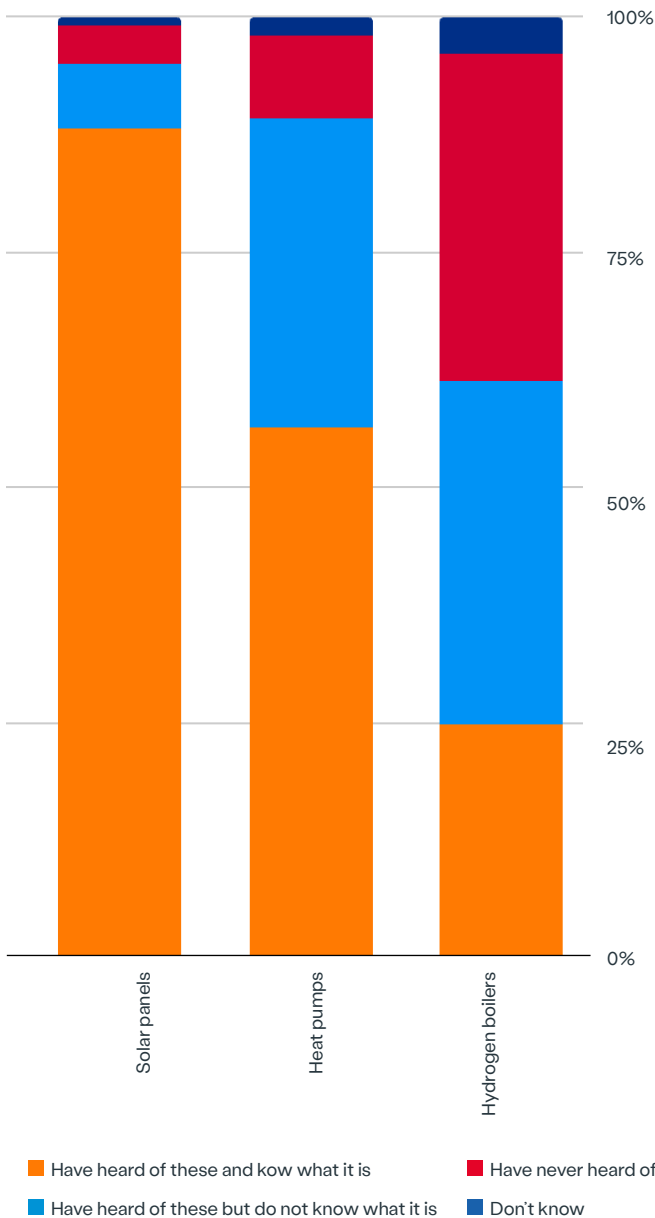
applications to the scheme⁹. Whilst this is positive, the current uptake of heat pumps is far below what is necessary to reach the Government's targets of 30,000 installed per year to 600,000 per year by 2028.

Awareness and understanding of heat pumps

We asked respondents about their awareness of various green home improvements, rather than just their willingness to install them. Of the three improvements we tested (heat pumps, solar panels, and hydrogen boilers), heat pumps have the second-highest level of awareness. A notable 89% of respondents have heard of heat pumps, with 57% saying they know what they are. In comparison, 88% of

⁹ Gov.uk, Boiler Upgrade Scheme statistics: January 2024

Figure 12 - Awareness and understanding of green improvements (April 2024).



respondents know about solar panels and understand them, while only 25% can say the same about hydrogen boilers.

Perceived importance of, and willingness to, install a heat pump

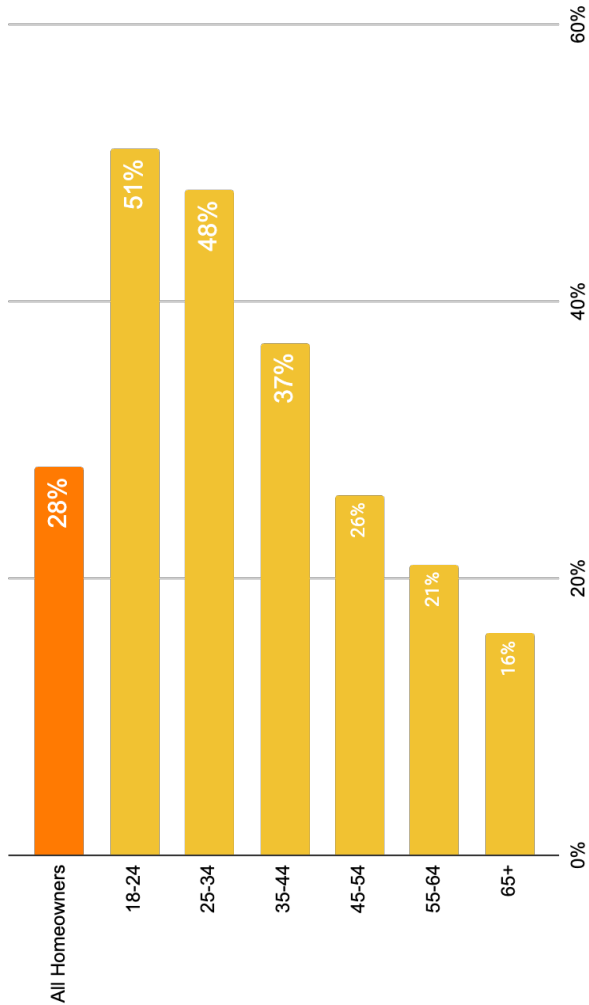
We find that homeowners are becoming increasingly convinced of the need to switch out their gas boiler for a heat pump. Almost half of the public (49%) think installing a heat pump in their home is important, with 7% saying it is essential to do so. This is an increase of 16% in the perception that it is important to replace their gas boiler with a heat pump, from 32% in 2023.

Just over a quarter of homeowners are willing to install a heat pump in the next 2 years, with 4 in 10 (38%) saying they were not willing to do so. This is identical to 2023. When we asked respondents how willing they would be to install a heat pump over a ten-year timeframe, we saw willingness increase by 10% to 38%, with 29% not willing to do so.

34% of those able to do so are willing to or have already installed a heat pump



Figure 13 - Share of respondents willing to replace their gas boiler with a heat pump in the next 2 years (April 2024).



We see a substantial difference between respondents with differing levels of educational attainment. Those with lower levels of educational attainment are less than half as willing as those with postgraduate degrees to say they would be willing to replace their gas boiler with a heat pump. There are many likely causes for this, and while we did not explore the reasons behind this further in the survey, it is likely a result of higher income levels and greater familiarity with technologies among those with higher educational attainment.

Looking into what barriers need to be resolved for homeowners to feel empowered to take action, we see that **concerns are primarily over the cost of**

installation (62%), followed by concerns that installing a heat pump wouldn't save them enough money on their energy bills to be worth doing (20%), and confusion over the Government grants available (19%). These are notably the same concerns that are key barriers for installing rooftop solar panels.

Whilst the cost of installation continues to be the primary barrier for homeowners to install a heat pump (62%), we find that the significance of this barrier relative to other considerations, such as environmental impact, has increased. For homeowners currently using a gas or oil boiler, price now comfortably beats environmental impact when thinking about what type of replacement they would make. 43% said they would install the cheapest option, regardless of any environmental impact, with 32% saying they would install the most environmentally friendly option, regardless of the cost. **Contrary to our findings in previous years, respondents of all age groups are now more likely to say they would pick the cheapest option than the more environmentally friendly option.** This change is likely due to the impact of the cost of living crisis on homeowners.

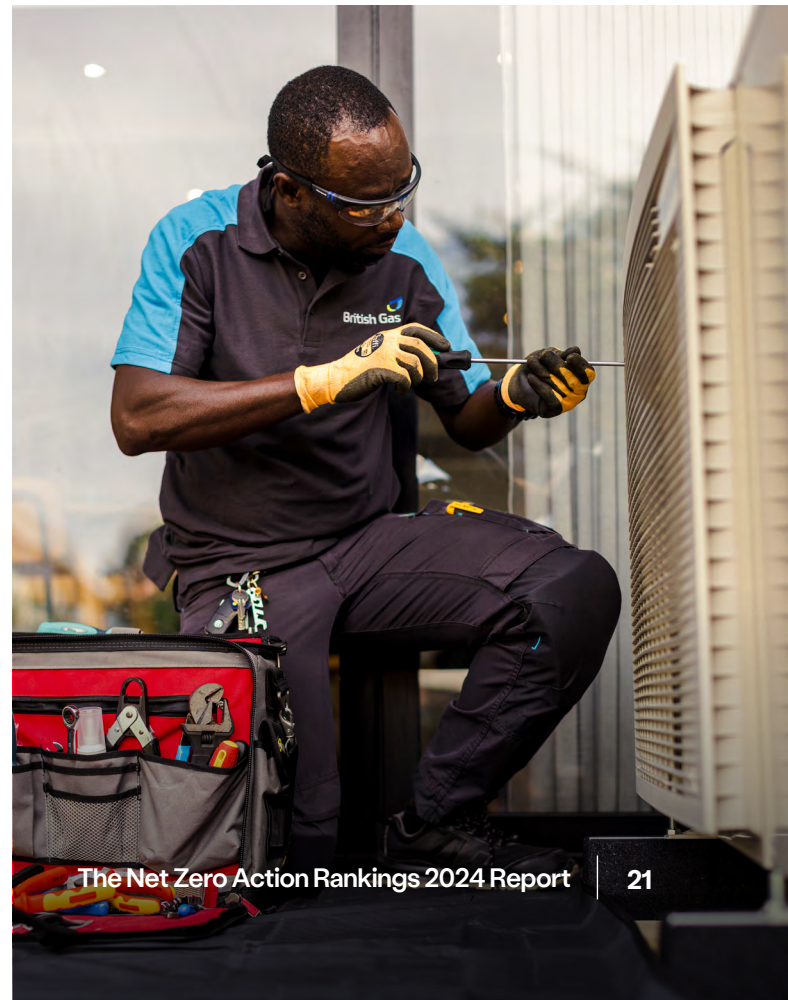


Figure 14 - Barriers to the public installing heat pumps (April 2024).



One key challenge for heat pumps, in particular, is a lack of awareness of the alternatives to traditional boilers. We would expect this to decline year-on-year as the rollout of heat pumps becomes more widespread and the public begins to see examples of heat pump installation from friends, neighbours and the press. However, **our survey finds that the public remains as unsure about their choices and preferences as they did twelve months ago.**

Whilst Government policy (both the previous Conservative Government and new Labour Government) signals to the eventual phase-out of gas boilers in favour of low carbon alternatives such as heat pumps, our research finds that **homeowners are not on the same page as Government policy and are reluctant to replace their gas boiler for a heat pump.**

When asking homeowners with a gas or oil boiler about replacements, 37% say they would go for a similar gas or oil-fired boiler. 14% say they would choose a heat pump. 5% anticipate choosing a boiler that runs on hydrogen. But the single biggest group is the **38% of people who say they don't know what they would choose.**

This is an area where Government and energy suppliers can play an important role in communicating with and educating the public on the direction of travel for home heating and what this means for them when their gas boiler eventually needs to be replaced.

4. Attitudes towards installing electric vehicle charge points

Transport is the biggest sectoral source of CO2 emissions in the UK, accounting for around one-third of total emissions¹⁰.

Positively, electric vehicles are becoming increasingly popular with motorists, and it is a rapidly growing market, with a variety of options and competitive price points. There are now over a million electric vehicles on British roads. Electric vehicles make up a growing proportion of newly bought cars. For the 2024 period so far (Jan to June), battery electric vehicles make up 17% of new cars registered in the UK, and hybrid (including plug-in) cars make up 22%¹¹.

Access to charging remains one of the main barriers to mass EV adoption. If we're to make electric vehicles accessible for every driver across the UK, then we must tackle

the inequality that exists between at home and public charging. With private charge points, homeowners with a driveway can take advantage of cheap off-peak energy prices and even contribute power back to the grid during times of high demand.

Despite this however, we found that there is a decline year on year in the proportion of homeowners that are willing to install a charge point in their home in the next 2 years, from 46% in 2022 to 37% in 2024. This may be caused by the early adopters already having moved, so it is the stickier consumers left (those least willing or facing the greatest barriers e.g low income households), or by the negative coverage of electric vehicles in the press, reinforcing the public's concerns about range and price.

We found that 40% of homeowners said they thought it was important to install a fast-charge point in their home. Almost a quarter (23%) of respondents said it was not at all important for them to do so.

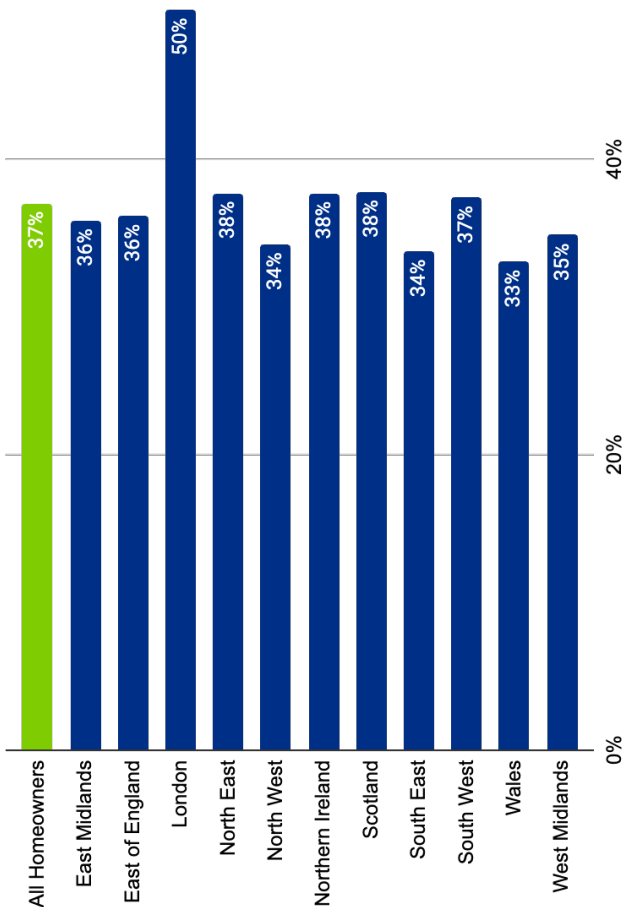


37%

of those able to do so, are willing to or have already installed an EV charge point

There are significant regional differences in willingness to install an EV charge point

Figure 15 - Share of respondents willing to install an electric vehicle fast charging point in the next 2 years (April 2024).



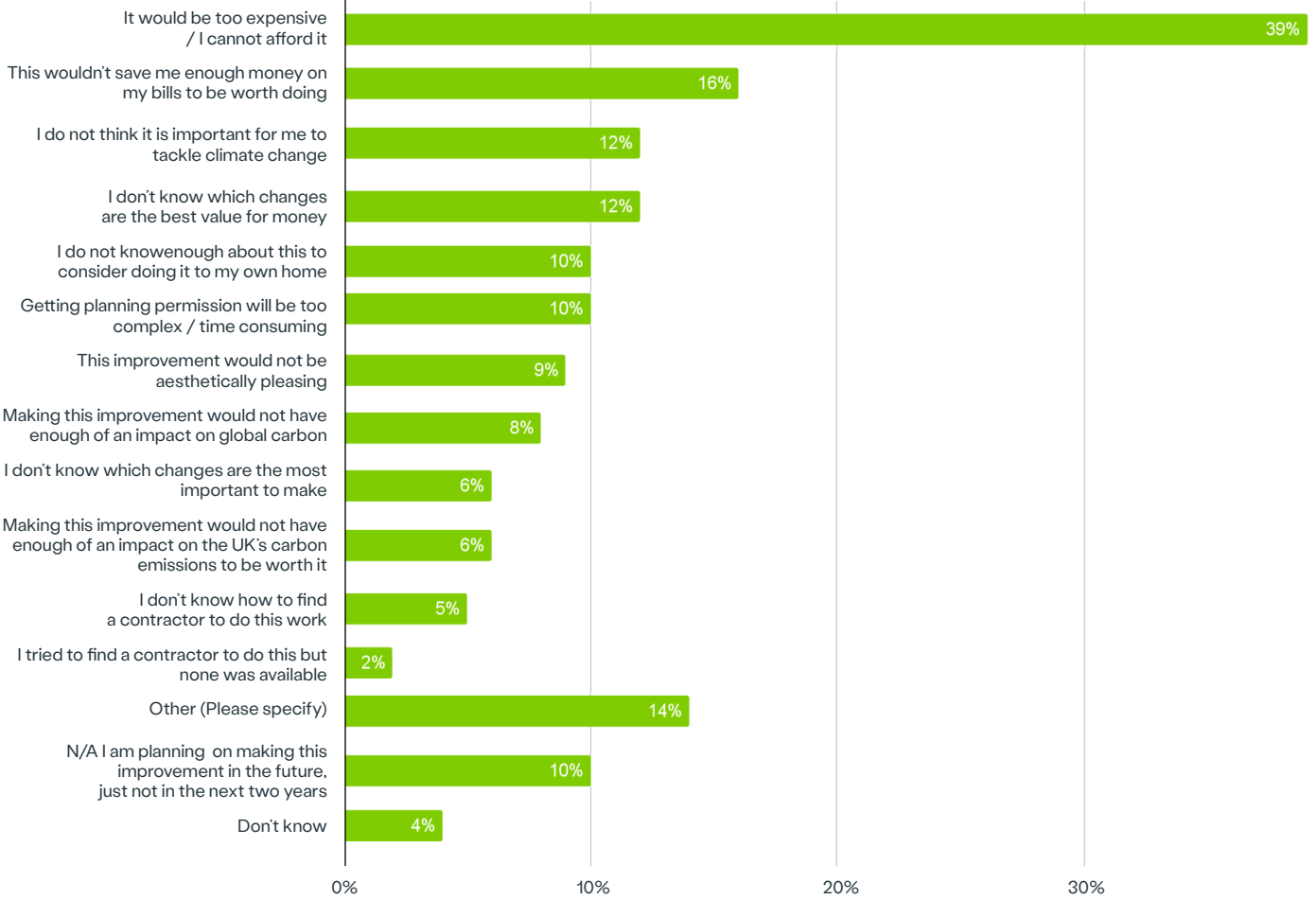
Homeowners in London are substantially more likely (50%) than those in the rest of the country to say they would be willing to install an electric vehicle fast-charge point in the next two years, compared to just 33% in Wales. This difference could perhaps be explained by wealth, politics and urban v rural differences in electric vehicle uptake. For example, Londoners are generally more supportive of net zero, more wealthy, and may have less range anxiety than those living in rural or suburban areas.

Looking in greater detail into what barriers homeowners face that prevents them from installing a charge point, we see that they are unconvinced of the personal cost-benefit and lack incentives. Once again, concerns over the cost are the main concern (although at a far lower rate than solar panels or heat pumps), selected by 39% of respondents. This is followed by concerns that it wouldn't reduce users' bills enough to be worth installing (16%).

Not having access to a driveway was a barrier for homeowners considering purchasing an electric vehicle. 17% of those who don't have access to a driveway said they'd be more likely to buy an electric car if they did, and 62% of all respondents said it would be easier to own an electric car if they had access to a driveway - showing how improved access to on-street charging is a vital way that Government can make electric vehicle ownership more accessible for homeowners.



Figure 16 - Barriers to the public installing fast charge points (April 2024).





The energy system is undergoing a radical change, with UK households playing a critical role in this revolution - from both consumption and generation perspectives.

And with this transformation, what households will want and need will broadly remain the same. The household energy experience needs to be reliable, simple, and affordable. Welcome to a whole new world of home energy.

Also within the Centrica family, Hive's team of engineers have been developing a range of technology designed to help households live greener, lower bills and control homes like never before. For EV chargers, solar panels, energy-saving light bulbs, waaay smarter heating and a whole lot more. For the home you love and the planet we share.

We're here to help every home reach its eco-energy potential, from little switches that make a big difference over time and at scale, to more significant upgrades that significantly improve your home energy bills and your impact on your home planet.

We know we're all at different stages on the journey so if you need an EV charger for your electric car, or solar panels to boost your energy efficiency, then we've got it.

But Hive offers more than just products. Customers can enjoy smarter, greener, money-saving homes, all controlled by their app.

Needing a heat pump? We are integrating heat pumps into our market-leading Hive app before the end of the year.

A one-stop shop, whether it's adjusting the thermostat, managing lighting, controlling security cameras, or monitoring energy usage. All the smart home devices work in harmony and independently, allowing customers to control their home like never before. And we're making it great for the planet and your pocket by introducing incentives like FreeCharge, where we will pay back 100% of your charging costs for a whole year when you pair your Hive charger with any British Gas electricity tariff. Or our Heat Pump Energy Offer which gives you cheaper energy for heat pumps to help with ongoing running costs.

Because the only way we're ever going to get there is together. Because smart, sustainable and money-saving energy should be for everyone. Wherever you are on your net zero journey. Whatever your home energy goals. Hive helps you make smarter energy choices, cut your bills and improve your environmental impact.



Join the Hive at hivehome.com

Going Green in a Cost of Living Crisis



It's no surprise that nearly half (48%) of the public believe we should prioritise keeping heating costs low, even if it means contributing more to climate change.

The cost of living crisis has dominated UK homeowners' lives for the past three years and inhibited their ability and willingness to make expensive upgrades to their homes. It is unlikely that households will feel a material difference in their finances in the short-term.

It is expected that the energy price cap will increase in October this year, with home energy bills forecast to rise by 10% for the average homeowner¹². As energy prices are fundamental to the wider economy, we can expect higher prices to continue to impact the wider cost of living as well - meaning that British households will continue to pay an inflated price in their weekly expenses like food shopping. Even though energy bills peaked in 2023, they are expected to remain above pre-crisis levels for the medium-term. Reducing homeowners monthly bills will continue to be a priority for the public, and therefore should be a focus of the new Labour Government this Parliament.

It's no surprise that nearly half (48%) of the public believe we should prioritise keeping heating costs low, even if it means contributing more to climate change. **This highlights the biggest hurdle for homeowners: they're not convinced about the cost benefits. The upfront investment feels too steep, and the expected savings on their energy bills seem too small.**

Given the cost of living crisis, personal finances are tighter than ever, and the interest rates for taking on loans are high. Across the past 3 audits, cost remains the primary barrier that prevents the public from having the appetite to install green upgrades.

This section tries to unpick how homeowners would behave even if they were able to pay, to understand what barriers there are beyond upfront cost. We find that green upgrades are far less appealing than other options such as going on a holiday, and that a lack of knowledge and awareness impedes homeowners.

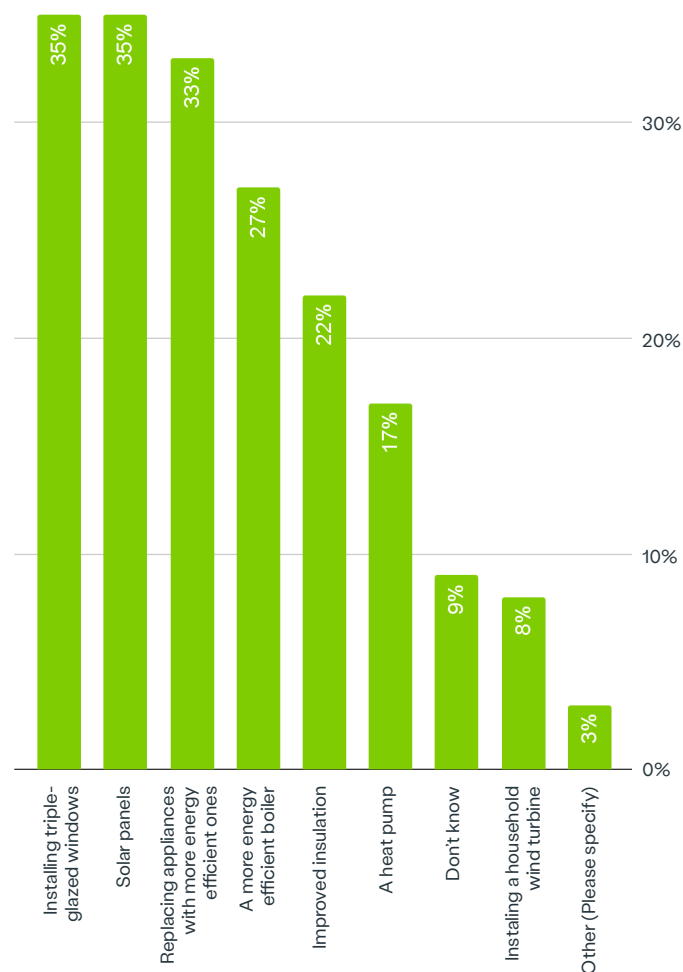
The public aren't convinced a tight budget is best spent on green upgrades

We presented respondents with a series of questions asking them how they would respond if they earned different windfalls of money (£500, £1,000, £2,000, £5,000, and £10,000), in order to test how green improvements would fare against more traditional destinations for spending, such as increased saving, a holiday, or a new car. Across all windfall levels, we find the three most popular options for spending are (perhaps unsurprisingly) paying off existing debt, paying for a holiday, or deciding to save the money for the future.

Green improvements were consistently deprioritised compared to the other destinations for spending. In general, the “green” improvements we tested (installing solar panels, investing in triple glazing, purchasing a new electric car, installing a heat pump, or installing improved insulation) performed relatively poorly. This is an important reminder to Government and industry who are trying to sell these green upgrades to homeowners that they are in competition with holidays and kitchen renovations, and losing. From the perspective of a homeowner (living in a time where household budgets are pinched and debt is expensive) **they need to be convinced that the cost-benefit and comfort provided by upgraded insulation is more attractive than a family holiday abroad or a new car.**

We also asked respondents what improvements they would prioritise if they were provided with a windfall of £10,000 that they were required to spend on green improvements to their home. Here, we find improvements such as installing triple-glazed windows (35%) and household solar panels (35%) were most popular, followed by replacing appliances with energy-efficient alternatives (33%).

Figure 17 - Green windfall spending priorities (April 2024).



Key barriers for homeowners are cost, inconvenience and a lack of information

We know that cost is often the main factor that prevents people from considering green improvements, but it is not the only driver of inaction. Even when upfront cost is removed as a barrier and respondents are told they will receive a cash bonus, they are more likely to say they would replace their household boiler with another gas boiler - albeit more efficient - (27%) than they are to say they would install a heat pump (17%).

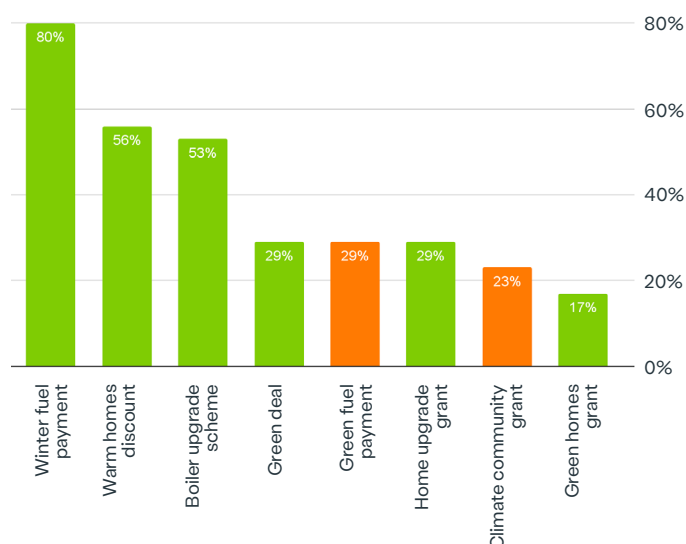
A major factor limiting the uptake of green improvements is a need for improved information and tailored advice about the technologies and whether they suit their home. When asked why they did not improve their home's energy efficiency, 40% of the public cited the up-front cost. The next most common reason for why they didn't upgrade their home was uncertainty about whether their house could accommodate more insulation (26%). Additionally, the hassle factor—like needing to empty the loft—was a significant barrier for 17% of respondents.

Another key barrier is that **the public lacks awareness of the Government support available to help mitigate the upfront cost and finds the grant landscape confusing.** When we dug into the barriers that prevented homeowners from taking action, around one in ten mentioned they were not sure what Government grants, if any, they would be entitled to. This was broadly consistent across each of the different improvements we tested, showing that a lack of clearly signposted information on grant eligibility is a key barrier.

We, therefore, wanted to investigate the public's awareness of grants in greater detail. In order to do this, we asked respondents whether they had heard of any of a series of green subsidies or grants provided by the Government, and included two fake options. Around a third (30%) of respondents claimed to have heard of the "Green Fuel Payment", which we invented, while around a quarter

(23%) said they had heard of the "Climate Community Grant," another invented term. Each had higher levels of 'awareness' than real Government schemes, which clearly shows how low awareness of Government schemes is.

Figure 18 - Awareness of government subsidies and grants (April 2024)



When directly asked, a majority (56%) of respondents said they find the current system of grants and subsidies difficult to understand, compared to 29% who find them easy to understand. Clearly, homeowner awareness of the Government support, and ability to navigate information on them, is poor. This is a key area where a new central Government can help to improve the information available, particularly on the Government website, so homeowners are able to make educated choices and access financial support.



Advice & Trust



Trusted sources of advice play a vital role in educating and supporting homeowners in the energy transition.

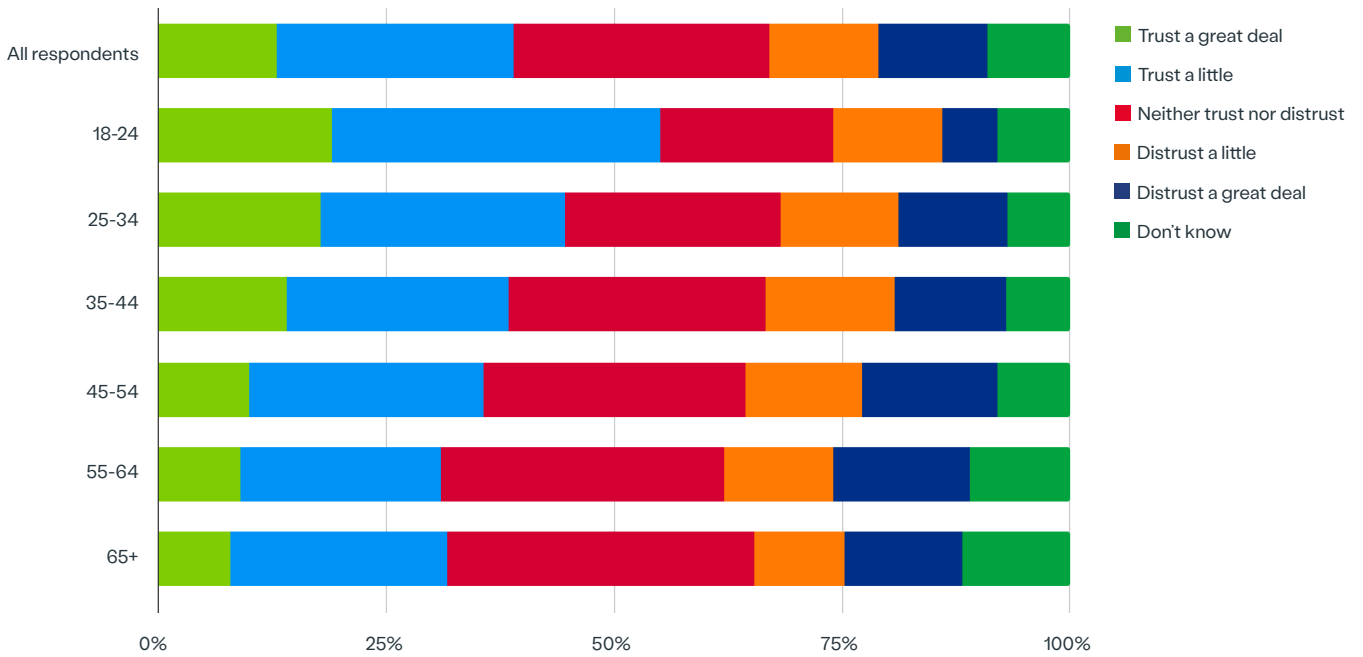
As our research shows, a key barrier for homeowners in decarbonising their homes is **low knowledge and confusion about what options are suitable for their homes** and the cost-benefit of making the investment.

With 200 years of experience and the largest heating engineering workforce in the country, British Gas is perfectly positioned to lead the way in helping homeowners transition to net zero.

Consistent with the past two years, over a third (39%) of the public say they trust British Gas to help deliver the Government's Net Zero target, with a net trust score of +14%.

Younger respondents have an even more positive view, with 54% of 18-24 year olds trusting British Gas to help deliver the Net Zero target, for a net trust score of 36%.

Figure 19 - Trust in British Gas by age group (April 2024)



Energy suppliers are increasingly working to support their customers in reducing their energy bills and decarbonising their homes. We found that, of the companies we tested, British Gas was one of the most trusted to help deliver

the energy transition. Most notably, all of the energy companies tested have net positive levels of trust to help deliver the Government's Net Zero target.



Conclusion



The data has shown that year on year, many of the results of the data have stayed largely similar when it comes to British homeowners' attitudes to decarbonising their homes.

Although the public support the Net Zero target and a majority of homeowner's are willing to make changes to their homes in order to tackle climate change - the public need improved information and financial support to take action and install upgrades in their homes.

To shift the dial, homeowners need:

- **Improved financial support options.** Upfront costs are a major barrier to making net zero homes a reality and homeowners have a low awareness of the support available. The Government should simplify their grant schemes, making them more accessible, and improve awareness of the home upgrade grants and private finance products available to homeowners.

- **Improved information.** The public aren't confident in the cost-benefit of making upgrades and want more tailored information. Clearer and more tailored information on the technologies, what is suitable for each home, and the process of installation should be provided by industry (including British Gas) to give homeowners the confidence to take action.

This time next year, we hope that our research will show that homeowners feel more encouraged that low carbon technologies will benefit them, and feel more equipped with the information and financial support they need to turn their interest into tangible action.

Methodology



Public First surveyed 4,016 people in an anonymous, online survey from 4th April to 14th April 2024. All results are weighted using Iterative Proportional Fitting, or 'Raking'.

The results are weighted by interlocking age & gender, region and social grade to Nationally Representative Proportions of the United Kingdom.

Public First is a member of the British Polling Council (BPC) and abides by its rules.



For more information please contact the Public First polling team:

polling@publicfirst.co.uk

