the ecoexperts

2024 NATIONAL HOME ENERGY SURVEY



In association with

Project Solar UK

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Executive Summary

***The Eco Experts'* 2024 National Home Energy Survey (NHES) shows that UK consumers have a high level of awareness of low-carbon technology (LCT) like solar panels, solar batteries, heat pumps and EVs.**

Satisfaction levels of consumers who have bought this technology are also very high, but costs and communications challenges are hindering more widespread adoption.

Our survey finds that the biggest barrier to the investment in LCT in homes across the UK is unquestionably the upfront costs involved. To help consumers overcome this, more action is needed from industry, financial institutions and government at local and national level.

By increasing public awareness of – and accessibility to – grants and more innovative funding models, the government will find that consumers are more than willing to make the switch away from fossil fuels.

While there is scepticism among the UK population about how much individuals can contribute towards combating climate change, according to the National Audit Office, heating the UK's 28 million homes accounts for 18% of all UK greenhouse gas emissions. Meanwhile, domestic transport accounts for more than a quarter (28%) of the UK's greenhouse gas emissions.

While there may be scepticism about what individuals can do to fight climate change, two things we should all be aiming to do that would make a significant difference in reducing the UK's carbon emissions are:

1. Moving away from burning fossil fuels to heat our hot water, homes and businesses.
2. Switching from a petrol or diesel car to an Electric Vehicle (EV).

While there are substantial costs involved in achieving these two goals, they would not involve a significant change in our lifestyles.

As you will see from our survey, public resistance to more personal lifestyle changes, like giving up – or paying more for – flights, meat and dairy is quite high, in contrast to the acceptance of LCT. All that remains to increase adoption of this already desirable technology, is to help consumers overcome the upfront costs involved.

The electrification of our power supply, transport, heating and hot water would go a long way towards helping dramatically reduce the UK's carbon emissions, and while infrastructure challenges around things like the National Grid remain, the technology we need to make the successful shift away from fossil fuels is already here. Consumers just need the right support to help them make choices that will benefit the UK as a whole.

Rather than being overwhelmed by information about climate change, our survey respondents expressed a desire for actionable, practical advice that will help them reduce their carbon footprint and cut their bills.

When confronted with new language about kWh, kWp, heat pump short cycling and the scientific jargon associated with LCT, it is easy to see why consumers might be baffled or intimidated by it.

Consumer information and language around switching to LCT needs to break down the science into simple terms, and explain the 'why?' to consumers. What will LCT mean for their energy bills and back pockets, and what help is available to them in order for them to make the switch?

How consumers prioritise the order of their decarbonisation journey will depend on their individual needs, but perhaps there is more that can be done to help connect these related products in the minds of consumers. The communications challenge here is to present LCT and electrification more holistically.

For example, if you have insulated your home and have double-glazing, it makes sense to get solar panels, a heat pump and a storage battery.

Similarly, if you have solar panels and a battery, it makes sense to get an EV and refuel your vehicle for free with a home charger. You might even be able to use your EV as a storage battery for your home.

For the new government - and they have started doing some of this already - part of the policy challenge is to demonstrate to both consumers and business that this path towards net zero and energy security has clear backing through its strategy.

As we will see, the majority of our respondents felt that the main political parties were not doing enough to help reduce our carbon emissions.

Most understand that the race towards renewables will not only help reduce our reliance on natural gas, but will also future-proof energy bills against the volatility and price shocks we have experienced in recent years, and provide the jobs and growth that the UK economy desperately needs.

The new government also needs to make investing in wind, solar and the National Grid easier for business so that we can generate and store the energy that we need, where we need it.



“As the pressures of climate change intensify and energy bills continue to rise, understanding the landscape of the UK’s renewables market has never been more critical.

At Project Solar, we are proud to collaborate with The Eco Experts on this report, which not only shines a light on the tremendous opportunities within the sector, but also underscores the challenges we must tackle head-on.

It’s incredibly heartening to see that the vast majority of those who invest in low-carbon technologies (LCTs) are extremely satisfied. Over the last 13 years, we’ve consistently received the same positive feedback from our customers, who report significant savings on energy costs thanks to their solar panels.

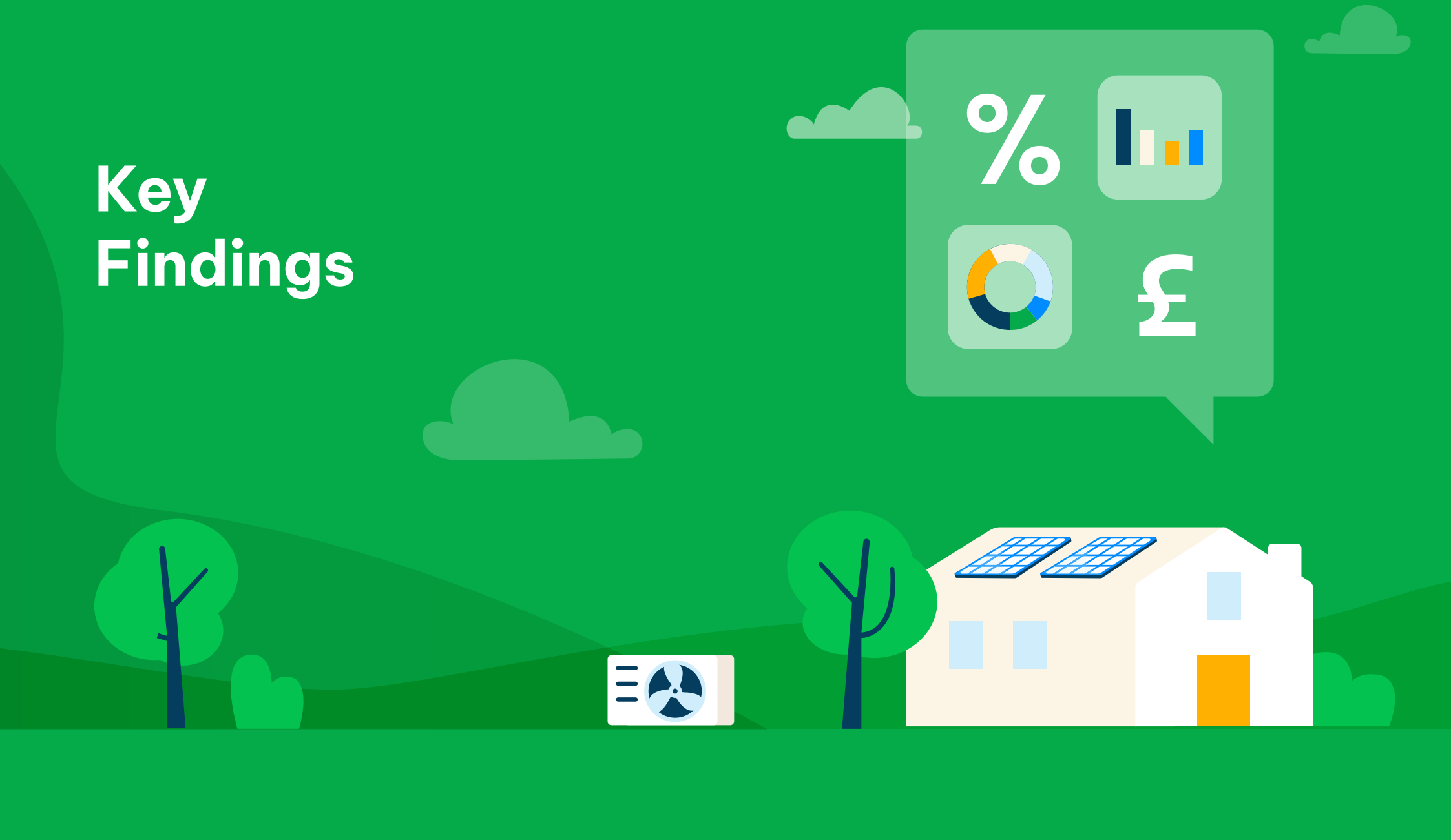
However, there remains a clear gap between awareness and widespread adoption of LCT. The challenge for government, industry leaders, and businesses alike is to bridge this gap—by effectively communicating the benefits, and simplifying the process for consumers to transition to cleaner energy.

Our hope is that this report will inspire accelerated adoption of renewable technologies, driving us towards a cleaner, more sustainable future for the UK. Together, we can meet the environmental and energy challenges of our time while empowering more people to embrace a greener way of living.”

Project Solar UK

Tom Armstrong,
Managing Director of Project Solar UK

Key Findings



Key Findings

93%

Public awareness and interest in LCT are high, with **93% of people aware of at least one LCT**. Page 20

37%

Despite high awareness levels, **only 37% of people have bought an LCT in the past 12 months**, indicating a gap between awareness and adoption. Page 22



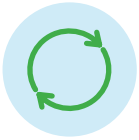
The main barrier to adoption is cost, **with 48% citing high upfront costs** as the main obstacle. Page 28



There's a significant lack of awareness about available grants and government initiatives, **with more than a quarter unaware of any initiatives.** Page 30



The public is more interested in **receiving actionable, practical tips for reducing their carbon footprint (16%)** than in other types of information about climate change. Page 51



There's a high level of willingness **(50%) to switch to energy providers that only use renewable energy**. Page 44



Financial motivations dominate decisions to adopt LCT, **with 51% citing energy bill savings as the primary factor.** Page 13



A large majority of people who have LCT are happy with them (81%). EVs and solar panels are the LCT that people are most satisfied with. Page 14



37% of people have bought an LCT in the past 12 months. Page 21



68% believe the government should offer tax incentives or rebates for energy-efficient appliances or home improvements. Page 59



There's a decline in the perception of a climate 'emergency', with **51% believing we're in one, down from 73% in 2023.** Page 36



62% of respondents believe political parties are not doing enough to reduce carbon emissions. Page 55



Regional variations exist in satisfaction with the main political parties on reducing carbon emissions, with **74% in Wales believing that the government isn't doing enough.** Page 56



There was scepticism about a new government's ability to significantly impact carbon emissions reduction, with **39% doubting and only 28% believing in its potential impact.** Page 58



The most recognized government grant is the Winter Fuel Payment (47%), while schemes designed specifically for energy efficiency or renewables have relatively low recognition. Page 30

Research Methodology

The Eco Experts National Home Energy Survey 2024 report is based on the results of its '**Attitudes towards low carbon technology and renewable energy 2024**' survey, conducted in June 2024.

The online survey received 2184 responses from UK residences aged between 21 to 85, including those who rent, live with parents or own their homes.

Each chart included in the report will specify the sample size received should it be different to the 2184 total respondent count.

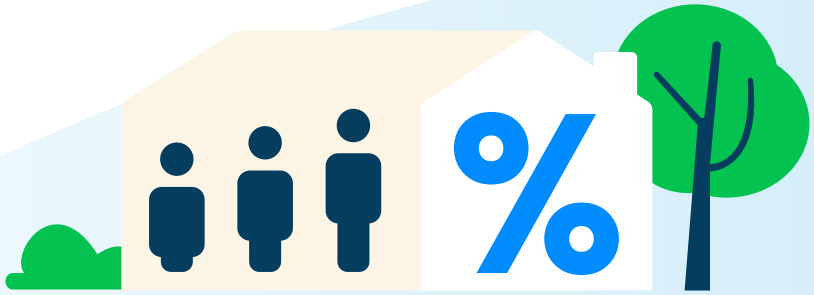
Case study interviews were conducted between June and September 2024 to provide additional context and real-life perspectives to the trends.

The National Home Energy Survey 2024 report was developed through discussions with many research advisors and practice leads. Further demographic context on the National Home Energy Survey results is provided below

Generational Divide

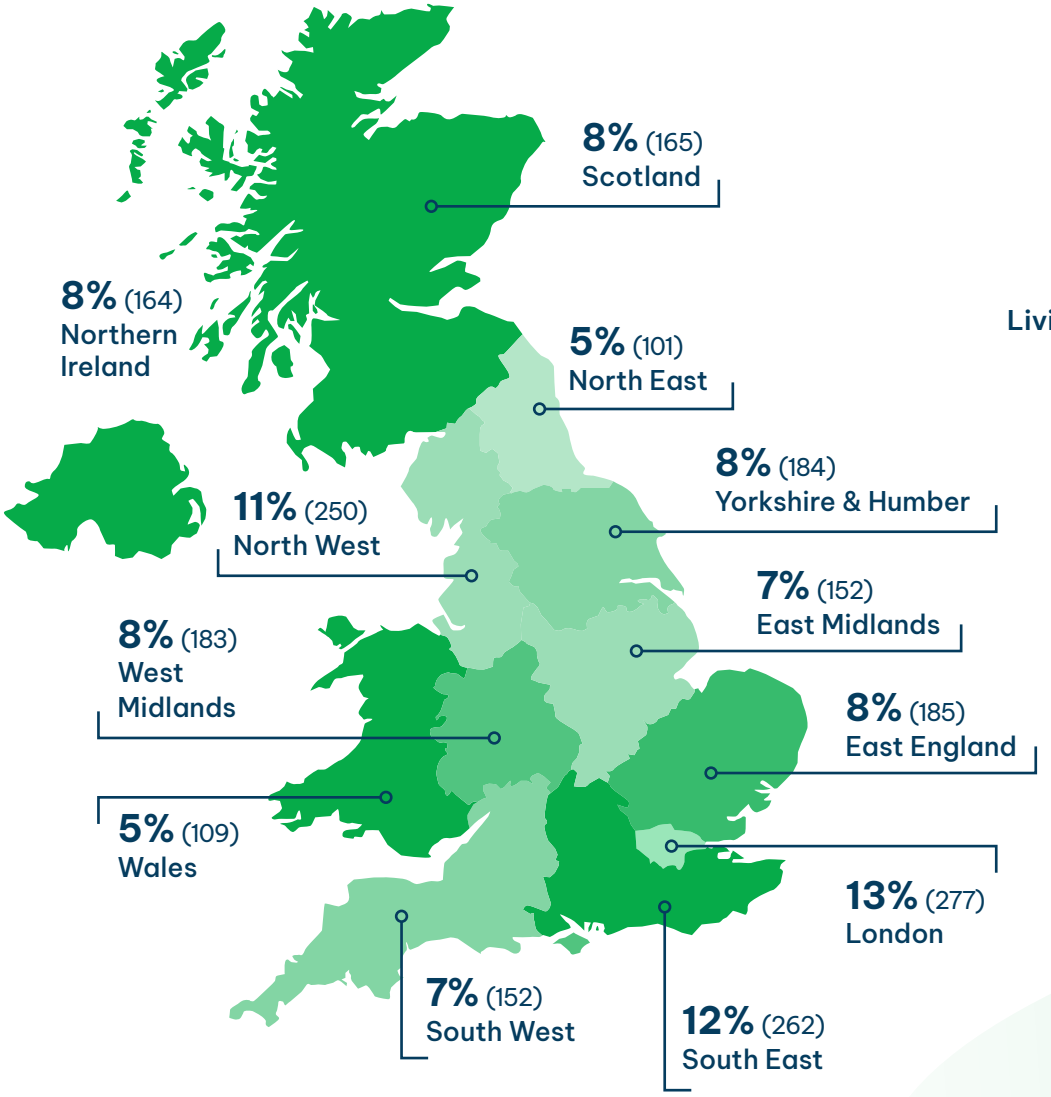
What is your age?

	Age Range	Response (%)	Response Count
Generation Z	21-25	**12%**	254
Millennials	26-41	**30%**	657
Generation X	42-57	**30%**	661
Boomers	58-74	**38%**	612



Regional Divide (n=2184)

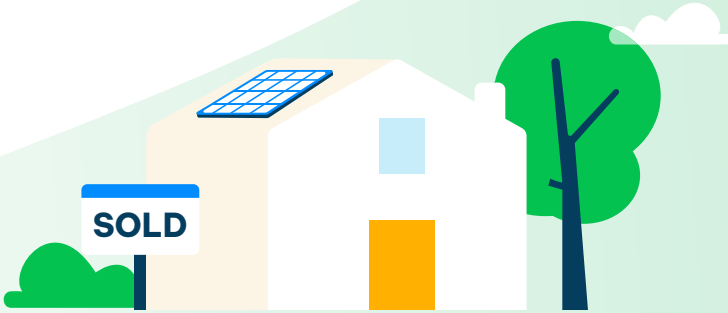
Where do you currently live in the UK?



Home Ownership (n=2184)

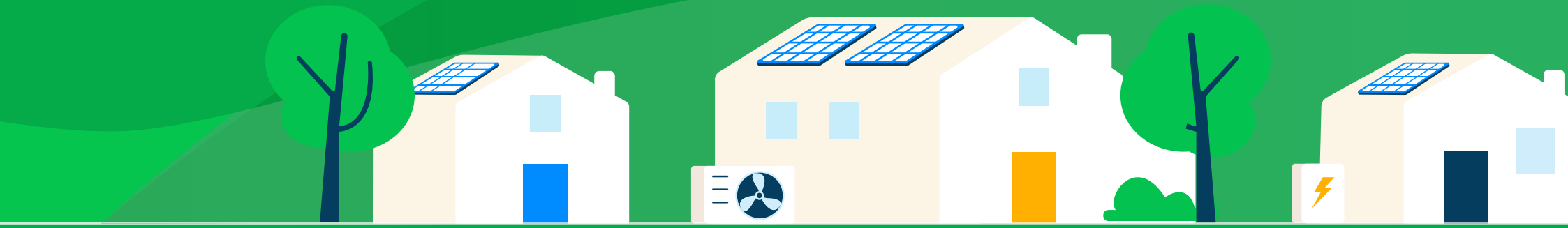
Please describe your living situation?

	Response (%)	Response Count
Homeowner	55%	1194
Tenant	37%	808
Living with Parents	8%	182
Boomers	38%	612



Part 1

Attitudes towards and investments in LCT



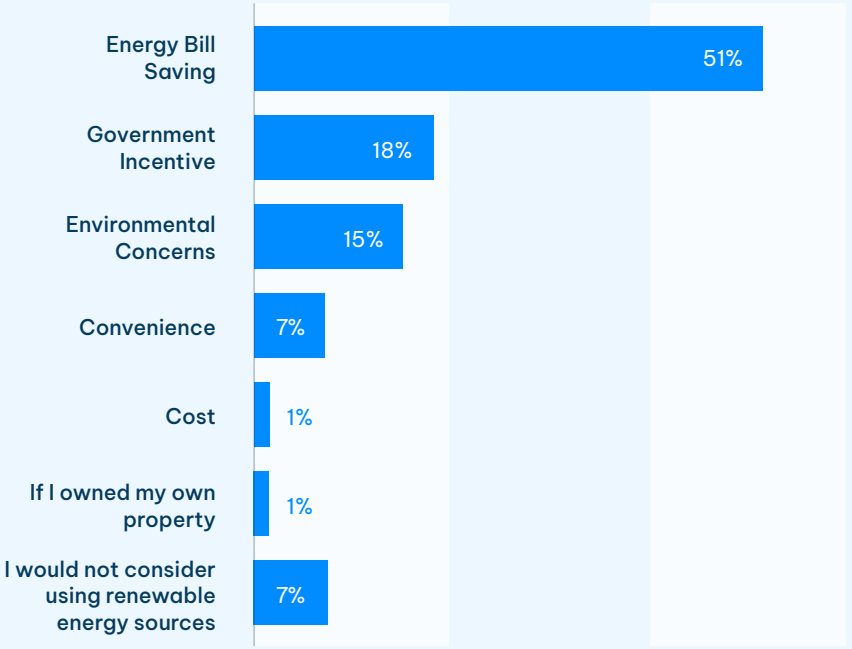
Part 1: **Attitudes towards and investments in LCT**

Over the last few years, the cost of energy has been one of the biggest economic challenges for households across the UK, piling substantial pressure on a population already suffering from low-wage growth, inflation and a reduction in living standards.

Like many other countries, the UK has ambitions to cut greenhouse gas emissions, including a commitment to reach net zero by 2050, but for consumers, the key motivating factor that will drive them towards renewables and LCT is economic - and more specifically, energy bill savings. As we will see, this comes way above environmental concerns.

As renewables are now the fastest-growing energy technology in the world, the moral argument for them can now make way for a far more powerful economic one.

Which factor would primarily influence your decision to utlize renewable energy sources?



Solar satisfies

Our survey shows that when people have LCT installed, they are generally very happy with their investment. More than four out of five people (81%) say they are satisfied or very satisfied with any LCT they have purchased.

Solar panels have particularly high levels of satisfaction, with 87% of people saying they are either satisfied or very satisfied with their solar panels.

This should come as no surprise, as solar installation usually takes only a few days, and the average three-bedroom household can enjoy a 50% cut in energy bills from day one, and the break even on a solar panel investment is usually within 15 years - 10 years earlier than their 25-year average lifespan.

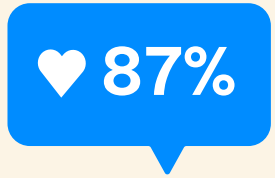


Year-on-year increase of solar panel purchases



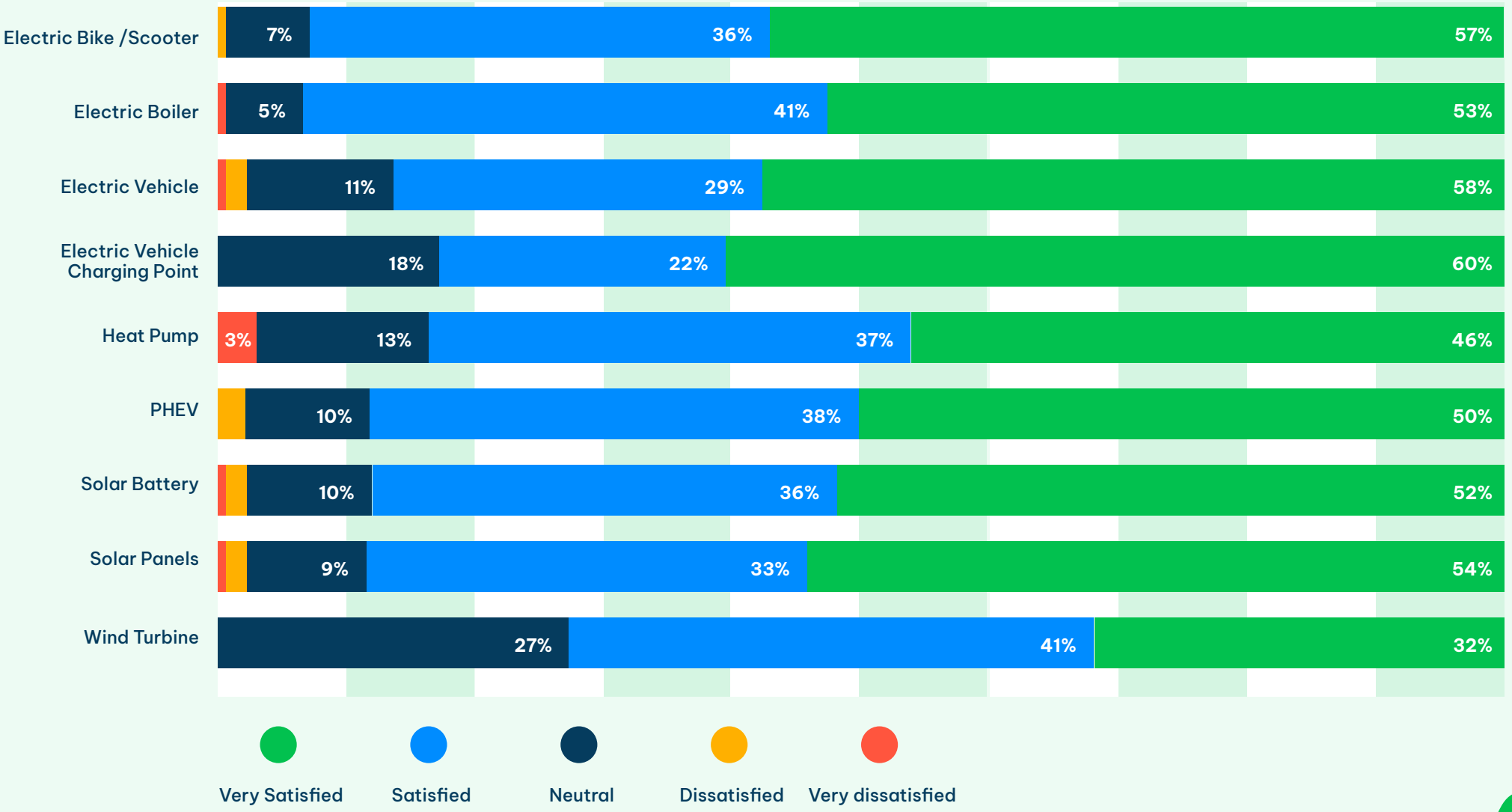
Typical bill reduction after installing Solar Panels

50%



People who are are satisfied or very satisfied with their Solar Panels

How satisfied are you with the low carbon technology that you have purchased?





Shirley Patterson, a homeowner in Fife, Scotland, who has owned solar panels since 2011, told *The Eco Experts* that she **recouped her initial investment in just over five years and saves roughly £66 a month on her energy bills.**

Shirely said the investment was "absolutely" worth it, "especially for the way we use the electricity to power our home-based offices, three plug-in cars, and the heating of our water."

She said the speed of her return on investment was because she could charge her car with solar energy, rather than paying for petrol, as well as making money back from the Feed-in Tariff - an initiative that allowed users to sell energy back to the grid.

Although it was withdrawn in 2016 and replaced with the Smart Export Guarantee (SEG), the Feed-in Tariff shows how government incentives can help people enjoy the benefits of clean energy.

Homeowner Peter Gibbs from Maidenhead in Berkshire had solar panels and an air-source heat pump installed in March 2022. He's been "really pleased" with the results.

> **"The savings are difficult to quantify because energy prices have been up and down, and that makes comparisons with previous years difficult,"** he explained. **"But I can be pretty confident that we haven't spent more than we would have done with gas and I'm fairly sure we've actually saved. The house has never felt more comfortable in the winter than it does now."**
>
> **Peter Gibbs,** Homeowner

> **I can be pretty confident that we haven't spent more [on bills with solar panels and a heat pump] than we would have done with gas and I'm fairly sure we've actually saved, and the house has never felt more comfortable in the winter.**
>
> **Peter Gibbs,** Homeowner

The high level of satisfaction when it comes to solar panels is certainly to do with the immediate reduction in energy bills, as well as their low maintenance costs.

Some of it may also be due to the technology's versatility - including options such as solar roof tiles for irregularly-shaped roofs, or bifacial solar panels which generate more energy than normal solar panels (if you have spare land or a flat roof to put them on).

There is also the opportunity to directly make money from your solar panels and other renewable energy sources through government initiatives, such as the SEG, which compels large energy suppliers to pay homeowners for renewable energy they send back to the National Grid.

Further Reading: **How to start saving costs on energy**

Check out our **eight renewable energy ideas** for your home to discover more ways to make your home energy-efficient.

Learn more about how you can reduce energy consumption with our **guide on how to save energy at home.**

EVs, e-bikes and heat pumps

EVs, electric bikes and scooters also have very high levels of satisfaction among adopters, with 87% and 93% respectively saying they were either satisfied or very satisfied with their purchases.

The lower running costs of EVs compared to petrol and diesel cars will almost certainly be a factor here, coupled with the increasing accessibility of charging infrastructure.

Electric bikes in particular are a very low maintenance and convenient way to get around, cruising up hills and whizzing past stationary traffic without breaking a sweat are key reasons for electric bike owners to be smug, and very satisfied with themselves.

The Eco Experts editor Roland Ellison purchased his e-cargo bike to transport his kids to and from nursery and school back in 2018, and is still using the bike regularly today:

"I still use it to ferry my kids to and from school and to their various clubs and sporting fixtures locally in South London. My kids are 8 and 11 now, and they still love it. I've never really had any problems with it, so it's been a fantastic purchase for us. As a regular cyclist anyway, I'm always extolling the virtues of getting an electric bike. Once you try one, you'll want to use it all the time. It beats being stuck in traffic any day."

NHS worker Emily Jones from South London is similarly satisfied:

> **My electric bike is probably one of the best investments I've ever made. It's better for the environment, keeps me fit, it's cost effective and the best thing is, I'm am no longer at the mercy of public transport. I can get from A to B exactly when I am supposed to, with no delays. In terms of the actual bike, it's really comfortable and sturdy with plenty of power to get me up steep hills.**

Heat pumps also have a high satisfaction rate of 84%, which demonstrates that people are very happy with them – in contrast to the many myths that surround them.

Of the remainder, 13% felt neutral and 3% very dissatisfied. Although this is a small number, it's the highest rate of very dissatisfied people of any of the LCTs in our survey.

This may be because heat pumps can be more complicated to install and maintain than solar panels, and there is a shortage of qualified engineers who can install and maintain them.

Our Heat Pump Cost Guide provides a detailed breakdown of installation, maintenance, and running expenses, helping you understand the financial commitment and potential long-term savings.

Did you know you could get financial support to install a heat pump? Explore our Heat Pump Grants Guide to discover available funding options and learn how to significantly lower your upfront costs.

The weakest-performing LCT for satisfaction was wind turbines, but even here satisfaction was fairly high at 73%, with the remainder neutral - no wind turbine owners reported being dissatisfied.

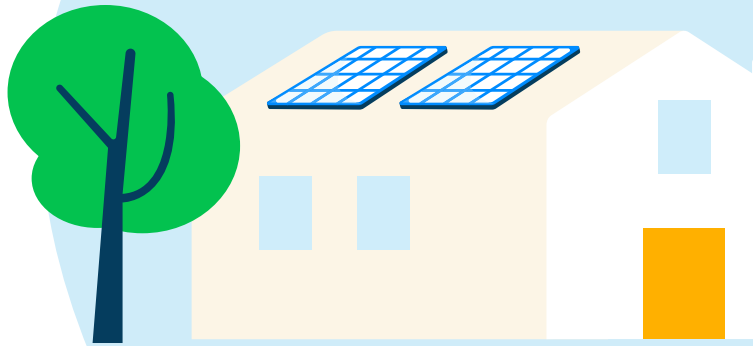
Wind turbines had the lowest uptake among our respondents, with just 3% of reporting a purchase – compared to 12% for heat pumps, which is higher than PHEV and electric vehicle charging points.

Given the small sample size for wind turbines, it's possible that the satisfaction data is less conclusive. This low adoption rate is consistent with trends across the UK, where wind turbine usage is generally lower compared to other LCT.

As we see more small-scale wind turbine products coming onto the market, we may start to see adoption levels and satisfaction levels start to rise in this area.

A huge
93%
of people are aware of at least one LCT

with solar panels having the highest awareness at
84%



Awareness of LCT

Our survey shows that the overwhelming majority of people know what LCT are, and how they can be used to help cut carbon emissions and energy bills.

A huge 93% of people are aware of at least one type of LCT, with solar panels having the highest level of awareness at 84%, narrowly beating electric bikes/scooters at 83%.

On average, people are aware of six LCT, and these are most likely to be solar panels, EVs, electric bikes, wind turbines and heat pumps.

Awareness has increased since last year: in particular, more people are aware of solar panels (4% increase) and heat pumps (11% increase) than they were a year ago.

Regional variations

There are some regional variations when it comes to adoption rates for LCT.

For example, there is consistently high interest in heat pumps in the South-West, where adoption in the last 12 months was 11% higher than the UK average.

Meanwhile, Scotland saw 11% higher adoption rates of solar panels than the UK average, with North West England and North West England also seeing high levels of solar panel adoption.

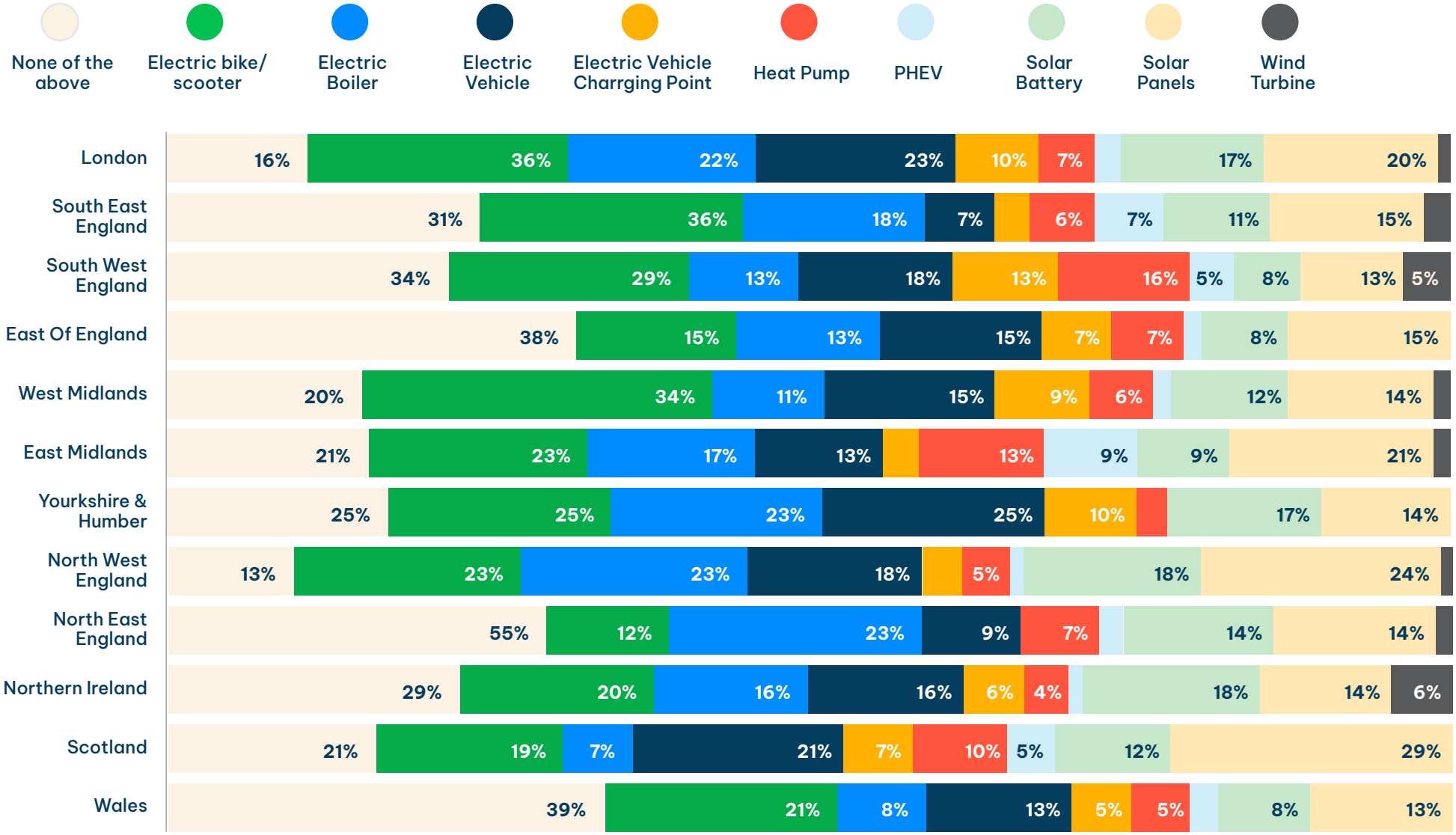
Conversely, Wales, the East of England and North East England saw the lowest adoption rates for LCT, falling 5% below the national average.

Another disparity is home ownership, with homeowners on average 2% more knowledgeable about LCT than those who rent. A majority of homeowners - 59% - are also aware of 7 LCT on average, slightly higher than the overall figure. This is probably because homeowners are more likely to buy LCT, which is logical since they are more likely to make long-term investments in their home.

While it is possible to install LCT in rented accommodation, it often requires permission from the landlord (and any other tenants) and given the risk of eviction or not living in the rented property long-term, it may be harder to recoup the investment.

Overall, awareness of LCT has increased, and our survey shows that, once purchased, people are very satisfied with them. The challenge is to overcome the financial barriers to people investing in them.

By Region: Which of these low carbon technologies have you purchased in the last 12 Months?



Does awareness translate to purchases?

Awareness of LCT has increased, and those who have used them are happy with the results, but how does this translate to more people actually purchasing them?

Unfortunately it doesn't. There is a big gap between awareness of LCT and purchasing, largely due to the upfront costs involved.

People are buying LCT to save money and become more energy independent. They are aware of the technology available, but perhaps the benefits of investing are not being communicated clearly enough.

Just 37% of people have bought at least one LCT in the past 12 months, which seems low when 93% of people have said they're aware of them.

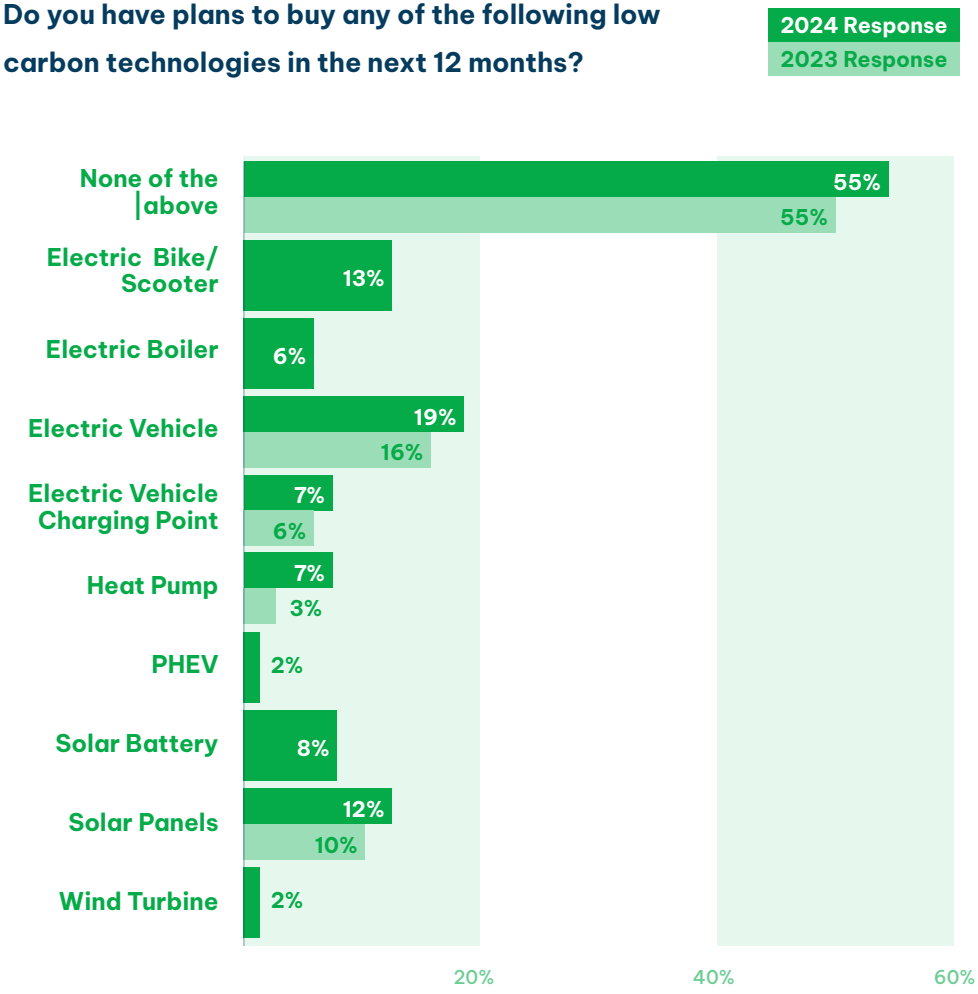
The disparity suggests that while LCT may be popular in theory, there are still considerable hurdles in the way of consumers investing in this tech for their homes.

The primary barrier to widespread adoption of LCT remains the high upfront costs.

With 55% of respondents saying they had no plans to buy LCT in the next 12 months – a figure that has gone up 5% from last year's survey.

However, the percentage of people who said that they intended to buy an EV was up 3% year-on-year. Intended heat pump purchases were up 4%, and intended solar panel purchases were also up 2% year-on-year.

Do you have plans to buy any of the following low carbon technologies in the next 12 months?



The main barrier to people investing in solar panels remains their cost.

While nearly half of the population expressed willingness to install solar panels if financial support were available, only 12% intended to purchase them in the next 12 months without assistance.

This disparity underscores the significant role that financial incentives play in making LCT more accessible. The data suggests that while there is a strong interest in adopting solar panels, the upfront costs deter potential investors.

In fact, 91% of Gen Z, Millennials, and Gen X said they would purchase low-carbon technology if financial support were available to them. In comparison, Baby Boomers were 8% less likely to be influenced by financial incentives.

> **People are aware of the technology available, but the benefits of investing are not being communicated clearly enough, nor are the tools that can help overcome financial barriers.**

Further Reading: **How Solar Panels Boost Property Value**

If you're considering buying a house with solar panels and want to know more about the purchasing process, check out our guide.

Curious about how solar panels affect the price of your property? Our guide to selling your home with solar panels has all the details you need to make an informed decision.

Past purchases

When asked which LCT people had purchased in the last 12 months, 'none of the above' came out on top, on 25% – although this number was down significantly from 53% in last year's survey.

The next most popular answer was an electric bike/scooter at 24%.

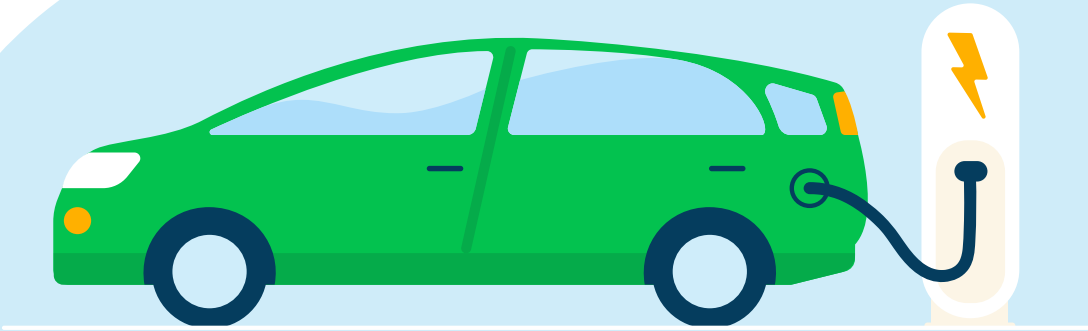
EVs came out third on 17%, which was up 14% on last year, while solar panels came third, with 18% of respondents saying that they had purchased them in the last 12 months, a figure that was up 13% year-on-year.

Research from the non-profit organisation Energy Climate Intelligence Unit (ECIU) and YouGov showed that a majority of petrol car drivers had a 'poor' knowledge of EVs and that this was discouraging them from switching, so there is still some work to do here.

However, our survey suggests that this is something that is already starting to change. A common theme of the survey findings this year is the increase in desirability and demand for EVs.

This is perhaps owing to a price war in the EV sector, which has seen prices tumble. According to some reports, used EVs are now cheaper than used petrol or diesel cars, and even new models are coming onto the market at very affordable prices.

Improved ranges of EVs and the increased accessibility to EV charging infrastructure could be a reason for this. Another factor could be better access to EV salary sacrifice schemes, which some employers offer to make purchasing an EV more tax efficient and affordable for their employees.



Motivations: 'The economy, stupid'

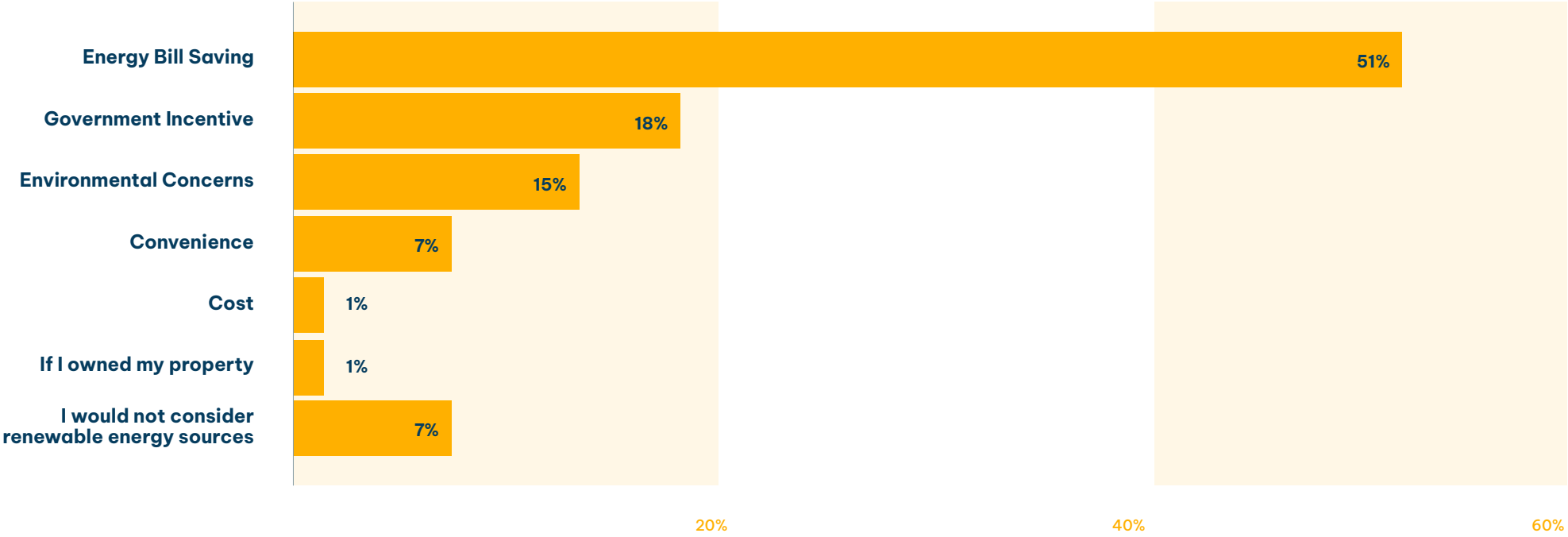
The key motivations for switching to renewable energy and technologies are overwhelmingly financial.

When asked about the primary factors that would motivate them to buy green technology, just over half of people - 51% - said energy bill savings, with just 15% citing environmental concerns, behind government incentives at 18%.

This reflects the broader trend of financial concerns as the main driver behind the adoption of renewables and LCT.

Installers are already using this 'energy bills' messaging when it comes to selling in LCT to consumers, and that's not surprising.

Which factor would primarily influence your decision to utilise renewable energy sources?



Generational Differences

In terms of motivation, energy bill saving was the most popular reason across all generations, especially Millennials, 57% of whom said it would be the biggest motivation for investing in LCT.

Gen X were a close second on 55%, some distance ahead of Gen Z and Baby Boomers, 49% and 43% respectively.

This suggests that the generations most likely to be buying their first property would be the ones most interested in the energy saving benefit of LCT.

Environmental concerns are a bigger motivation to Gen Z than any other generation, as almost a quarter - 23% - cited this as their primary motivating factor.

This is notably higher than other age groups: just 16% of Millennials, 11% of Gen X and 14% of Baby Boomers said the environment was their motivation.

Environmental concerns were the second biggest motivating factor for the two youngest generations - Gen Z and Millennials. For Gen X and Baby Boomers, the second biggest motivating factor is government incentives, perhaps reflecting the realities of those who have first-hand experience of home ownership.

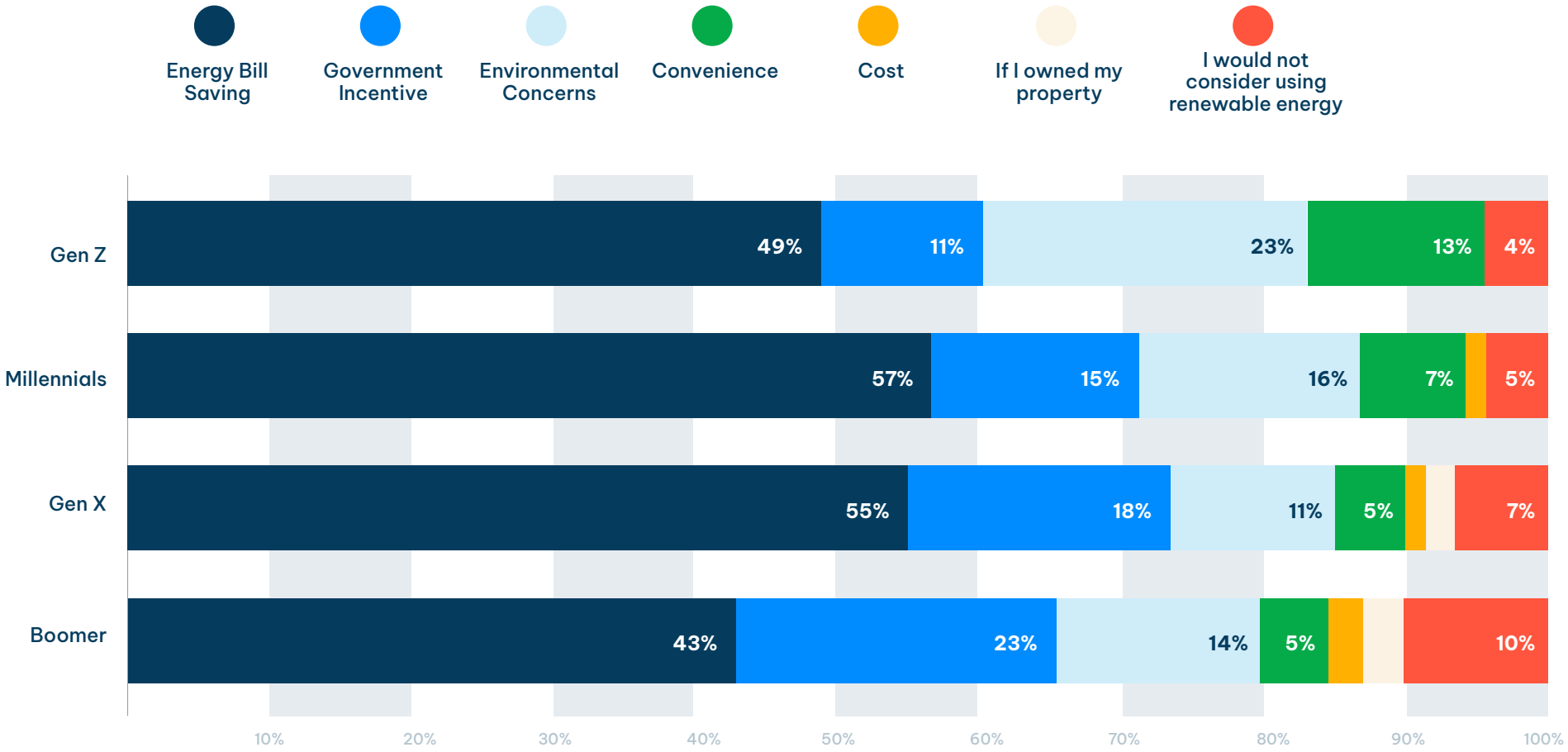
Overall, only 7% said they wouldn't buy an LCT under any circumstances, which means 93% are open to investing if their needs were met.

This figure is consistent with the number of people who said they are aware of at least one LCT, which implies that when people become aware of renewable technologies, they are more open to investing in them.

> **"Only 7% of people said they wouldn't buy an LCT under any circumstances, which means 93% are open to investing if their needs were met."**

Generational Segmentation

Which factor would primarily influence your decision to utilise renewable energy?



Adoption barriers

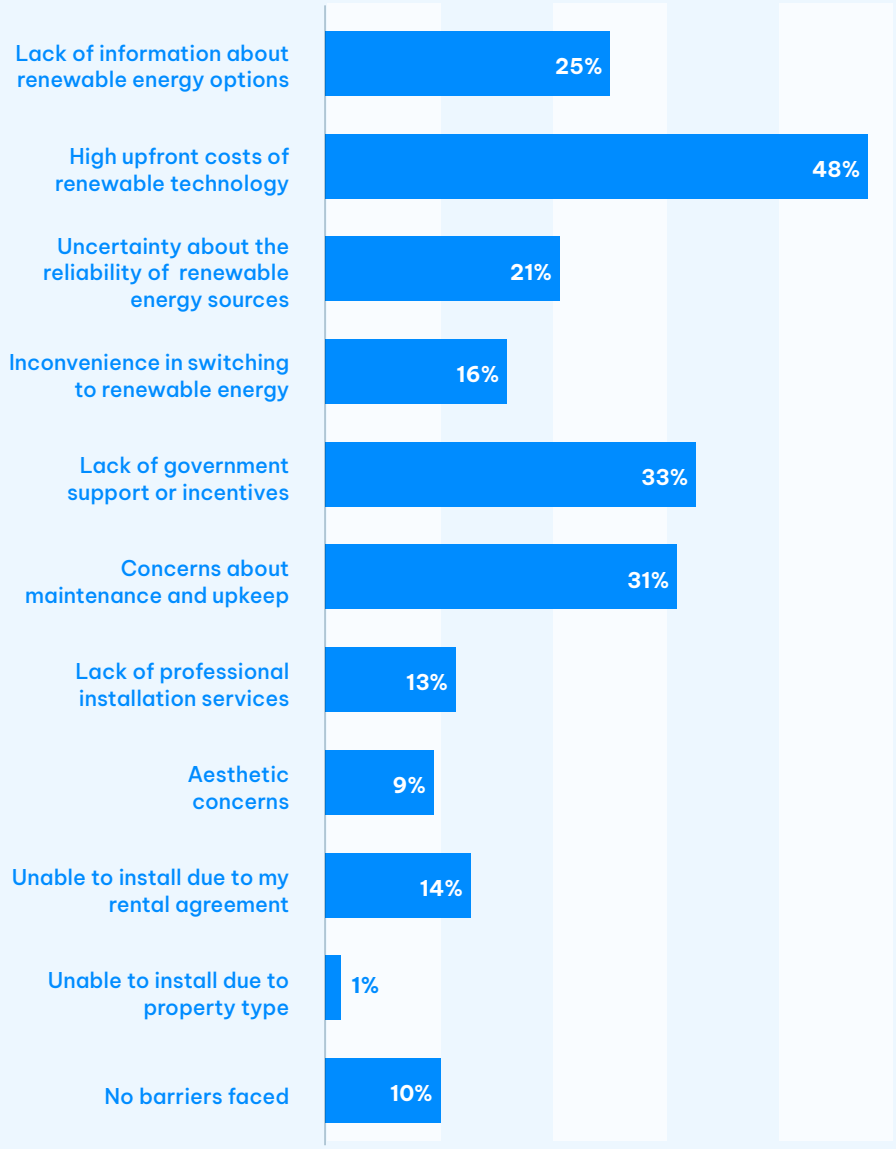
People are aware and interested in LCT, and could even be persuaded to invest in them, but not at the scale necessary for the UK as a whole to make a significant shift towards clean energy.

This leads us to the question: why are people not buying LCT and how can the gap between awareness, interest and investment be bridged?

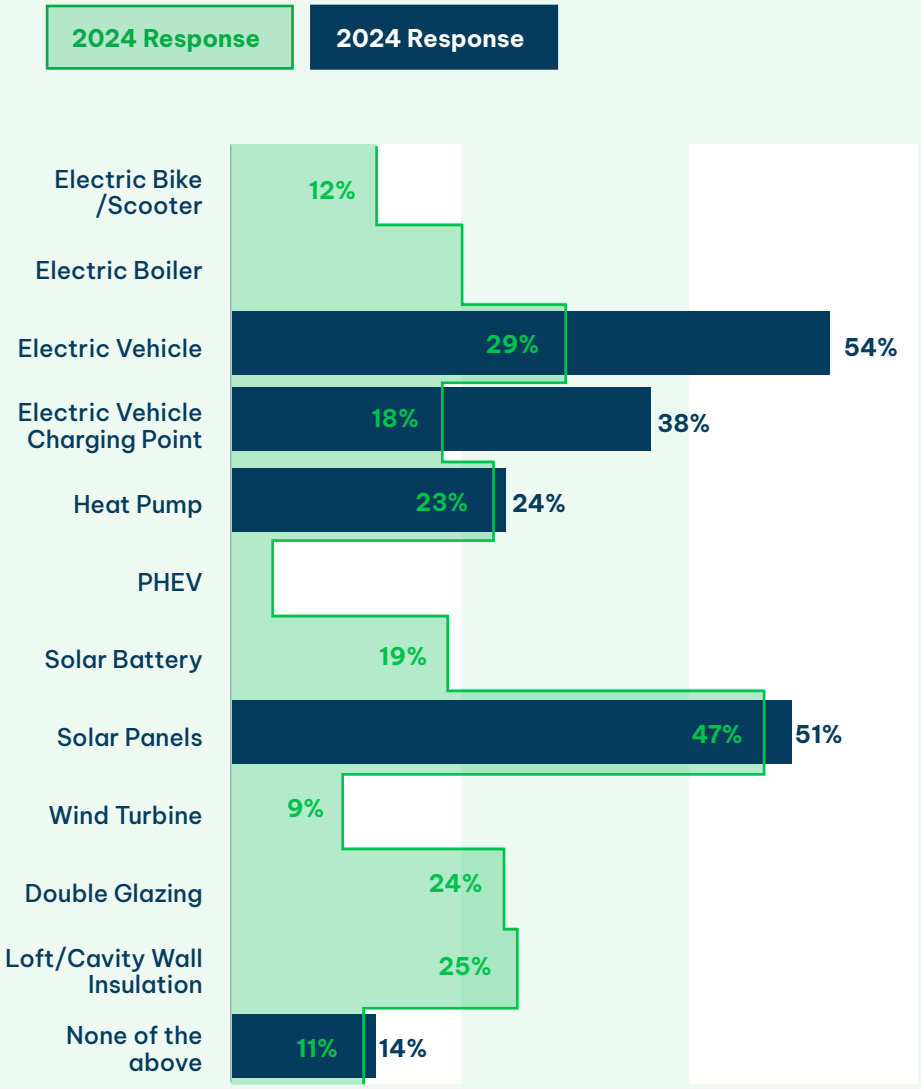
When asked about the biggest barriers to adopting LCT, almost half of people questioned - 48% - blamed the high upfront costs. A perceived lack of government support or incentives was the second most-cited barrier at 33%

Only 10% of respondents said there was 'no barrier' to them adopting renewable energy in their household, with the average person saying that there were at least two barriers standing between them and investing in renewables.

What barrier if any, do you face in adopting renewable energy practices in your household?



If you recieved financial support to cover the cost, which of the following options would you be most interested in?



A whopping 89% of respondents said they would be more likely to invest in renewables if they received support to cover the cost.

This figure has increased by 3% overall since last year, but interestingly has dropped significantly for EVs and EV charging points, the LCT which, according to the same respondents, they are most likely to buy in the next 12 months.

In 2023, EVs were the LCT that people were most interested in investing in if financial support was available at 54%, but this year, that fell to 29%. Perhaps indicating that EVs are now perceived as being more affordable. EV charging points fell from 38% to 18% in the same period.

This year, solar panels were the LCT that respondents said they were most likely to invest in with financial support (47%), perhaps indicating that solar panels are perceived as being desirable, but less affordable.

The availability of financial support, such as government grants, could have the biggest impact when it comes to LCT, particularly for solar panels.

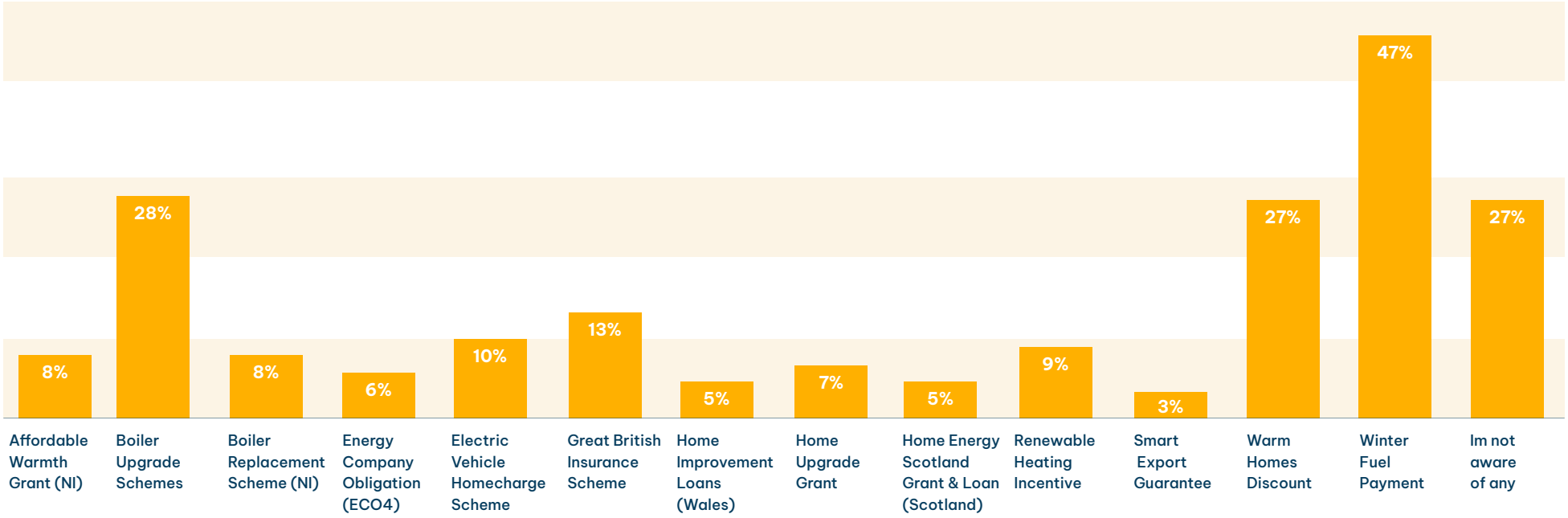
Awareness of Financial Support

Surprisingly, more than a quarter of respondents (27%) said they were unaware of any of the grants and government funding schemes available to them to help reduce energy bills or switch to LCT. On average, the UK public is aware of just 1.7 low-carbon technology schemes, pointing to a big communication gap between the government, funding bodies and consumers.

The most recognised government grant is the Winter Fuel Payment (WFP), which 47% of respondents picked out when asked which schemes they were aware of. This high level of recognition probably correlates with the length of time the WFP has been in existence, and the fact that it directly cuts the cost of energy for pensioners.

It is also the only scheme on the list that doesn't relate directly to renewables or energy efficiency - meaning that the level of recognition for sustainability incentives is even lower.

Which of these schemes are you aware of?



The Winter Fuel Payment is due to be withdrawn from all but the poorest pensioners receiving pension credit. It's estimated that ten million pensioners will no longer be entitled to it. This will make it all the more important to clearly communicate viable alternatives that will help keep people warm this winter, and more energy efficient throughout the year.

As it is, schemes that are designed to make homes more energy efficient are lagging behind in terms of recognition.

For example, the Energy Company Obligation (ECO4), a scheme specifically designed to fight fuel poverty through insulation, boiler upgrades and solar panels (for eligible households) was only recognised by 6% of people. That was still more people than recognised the Smart Export Guarantee - on just 3%.

Only two other schemes were recognised by more than a quarter of people - the Boiler Upgrade Scheme (28%) and the Warm Homes Discount (27%).

The Boiler Upgrade Scheme (BUS) covers all homeowners in England and Wales switching to renewable heating from a fossil fuel boiler. While the BUS scheme applies to nearly all homeowners, the criteria for other grants are much stricter, leaving many homeowners ineligible for government funding.

While some companies offer financing options for solar panels and double glazing, and there are now subscription models and rental schemes, it's clear the government should be encouraging banks and other financial institutions to do more to encourage low-interest loans or mortgages to encourage LCT adoption.

Further Reading: **Government financial support and incentives for LCT**

See available government support for solar panels in our Solar Panel Grants Guide. Also read our solar panel financing options which details how providers can help to make solar panel installation even more affordable.

Learn about heat pump grants and incentives with our Heat Pump Grants Guide.

Electric vehicle owners can also save - check out the Grants for Charging Points to get financial support for installing a home charging point.

If you're thinking about upgrading your windows, take a look at the Double Glazing Grants to see how you can cut costs while improving energy efficiency.

> **“The government should be encouraging banks and other financial institutions to do more to encourage low-interest loans or mortgages to encourage LCT adoption.”**

Making the benefits clearer

The greater awareness of the BUS and WHD may be because these schemes have wider eligibility, as well as marketing efforts and their direct relevance to reducing energy bills.

This suggests that communication may be key when it comes to encouraging the roll out of LCT. The data shows that clarity, not jargon, improves people’s understanding of technology and energy literacy.

This is particularly true of energy bills, which often contain complex terms and data that can be hard to understand. To improve energy literacy further and encourage LCT uptake, companies should simplify information as much as possible and consider offering bespoke energy-saving advice.

A large majority - 69% - said they are very confident or moderately confident when it comes to understanding their energy consumption, with 16% describing themselves as extremely confident.

This was not the case in all regions. In Wales, 16% of respondents said they were ‘slightly confident’ in managing and understanding their energy use, while 4% said they were ‘not confident at all’.

How Confident are you in understanding and managing your energy use?



The increase in the price of electricity and the wider adoption of smart meters seems to have contributed towards a greater consumer understanding of energy consumption.

Further Reading: **As the interest in LCT rises, more people are considering whether these investments are right for them.**

Are Heat Pumps Worth It? – Learn about the long-term savings, environmental benefits, and potential challenges of heat pumps.

Are Solar Panels a Good Investment? – See how solar panels can reduce your energy bills and boost your home's value over time.



Part 2

Attitudes towards green energy, climate change and the environment



Part 2: **Attitudes towards green energy, climate change and the environment**

Nearly everyone accepts the reality of man-made climate change, and countries across the world have announced their own net zero goals to try and tackle it. The UK's target date for net-zero emissions, for example, is currently set to 2050, as set out in the Paris Agreement.

Our survey shows that the majority of respondents (51%) believe that we're in a state of climate emergency. Meanwhile, 40% of respondents said they were 'very worried' about climate change.

Shirley Patterson, a homeowner in Glenrothes, Fife, is one of those who has expressed her concerns around climate change.

> **"What are these future generations going to think of our actions if we haven't done our utmost to halt further climate change that they'll be living with?"**
>
> **Sue Housley,** Self-build homeowner

Further Reading

What is climate anxiety? – Learn about the growing psychological effects of climate change and how people are coping with climate anxiety.

What does it mean to be carbon neutral? Explore what it means to achieve carbon neutrality and how individuals and businesses are reducing their carbon footprints.

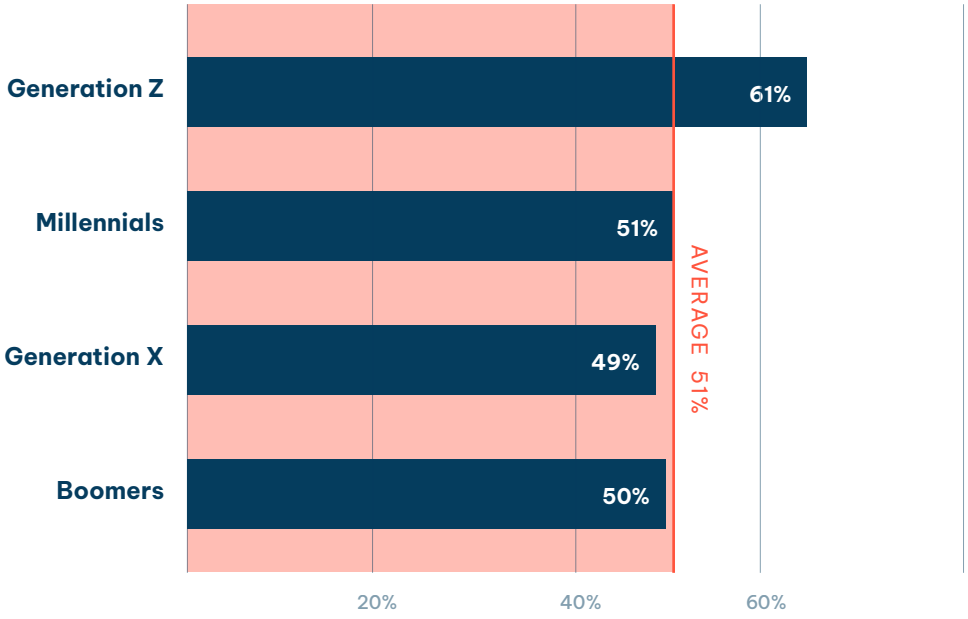
Declining belief in climate 'emergency'

This year, **51%** of our survey respondents believe that we are currently experiencing a 'climate emergency'.



Do you think we are currently experiencing a "climate emergency"?

% of people who said YES



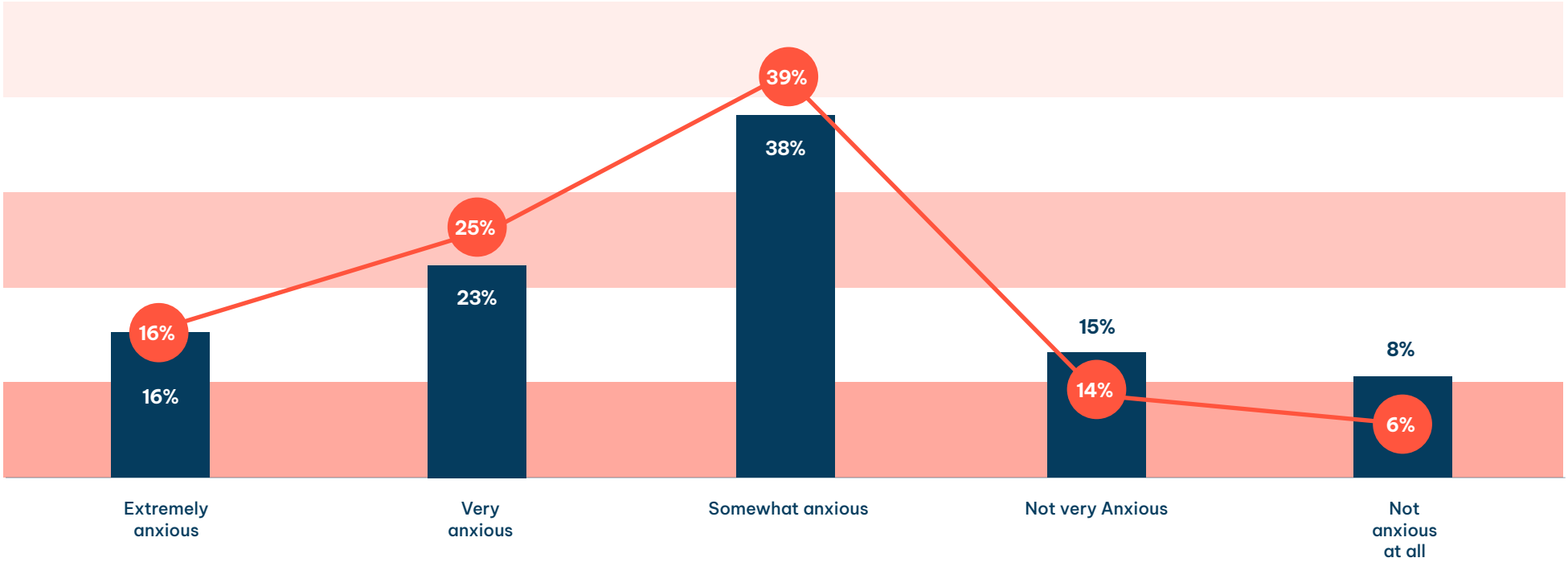
It's worth noting that this is lower than last year. In 2023, an overwhelming 73% of respondents agreed that we were facing a climate emergency.

This year, a combined 49% of respondents were either unsure (25%) or outright denied (24%) that we were experiencing a climate emergency, suggesting a growing polarisation of public opinion.

Meanwhile, 39% of the UK population felt either very or extremely anxious about climate change. As in previous years - the demographic most concerned about climate change was Gen Z, who continue to report high levels of anxiety about it.

> **I'm very concerned about climate change and we have an awfully long way to go. Governments need to help more and make renewable energy tech more affordable because young people who want to invest in it can't afford it. To lower climate change, things like funding and loans need to become more accessible.**
>
> **John Taylor,** Homeowner

How worried are you about climate change?



Water and sewage pollution emerged as the second most-significant environmental concern that people had (after climate change), with 66% saying that they were either 'very worried', 'worried' or 'slightly worried' about it. This is not surprising, given the widespread coverage of sewage overflows, and even contaminated drinking water reported in Brixham, Devon throughout the summer.

Air pollution was the third biggest concern, with 37% of people placing it as the most, or second-most, important environmental issue.

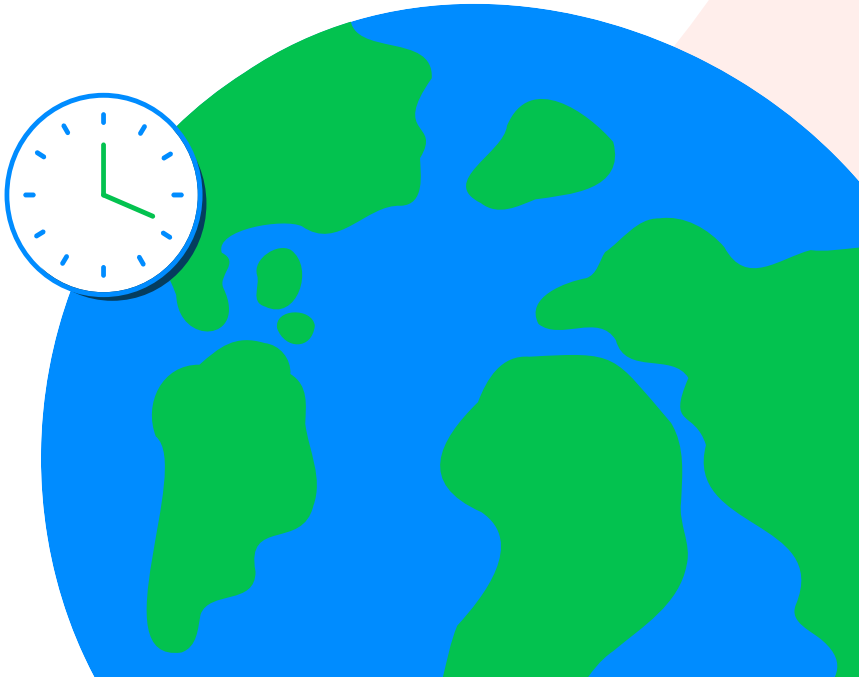
In recent years, the widespread health effects of invisible particles of air pollution have been increasingly publicised, as well as the fact that many UK cities regularly breach targets.

Plastic pollution came in fourth place in the list of respondents' environmental concerns, with 31% placing it first or second in their list.

Deforestation was last on the list of concerns, even though it is a significant contributor to climate change.

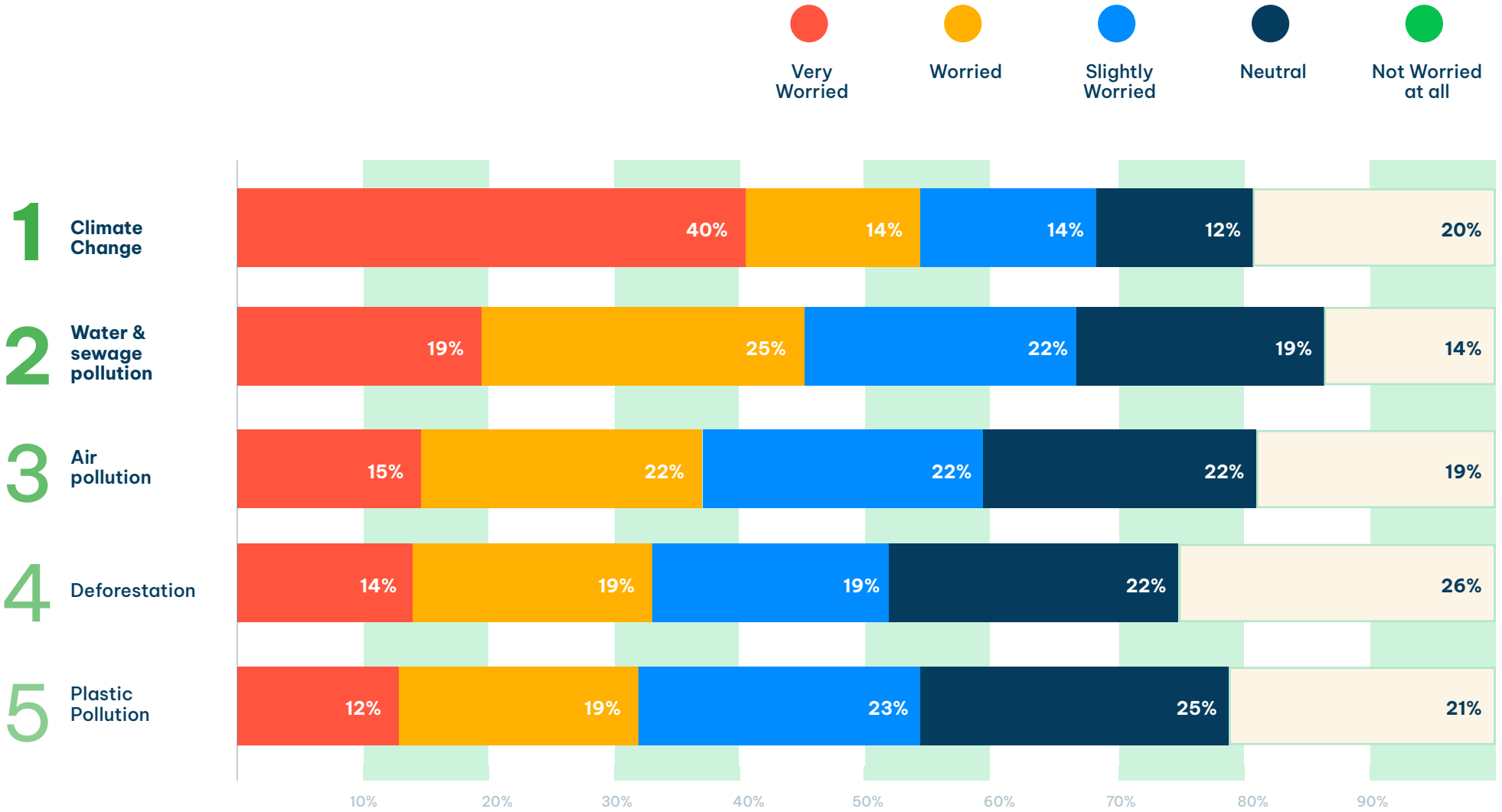
Deforestation is critical to global biodiversity loss, climate regulation, and the livelihoods of indigenous communities. Despite this, 26% placed it last on their list of concerns, and only 14% said it was their top concern, making it the lowest-ranking environmental concern that respondents worried about.

The geographical distance of the UK from the direct consequences of deforestation could be a significant factor here. It's not something that leads the evening news, but 3 million hectares (7.5 million acres) of Bolivian land has burned so far in 2024 as the South American nation battles the biggest outbreak of wildfires in 14 years. Brazil has experienced similar problems this year, but there is very little coverage of this in the UK media.



Ranked:

What are the biggest environmental concerns?



Closer to home

The shift in focus away from a climate 'emergency' could be due to the fact that the UK population has been focused on the immediate challenges of the cost of living crisis closer to home.

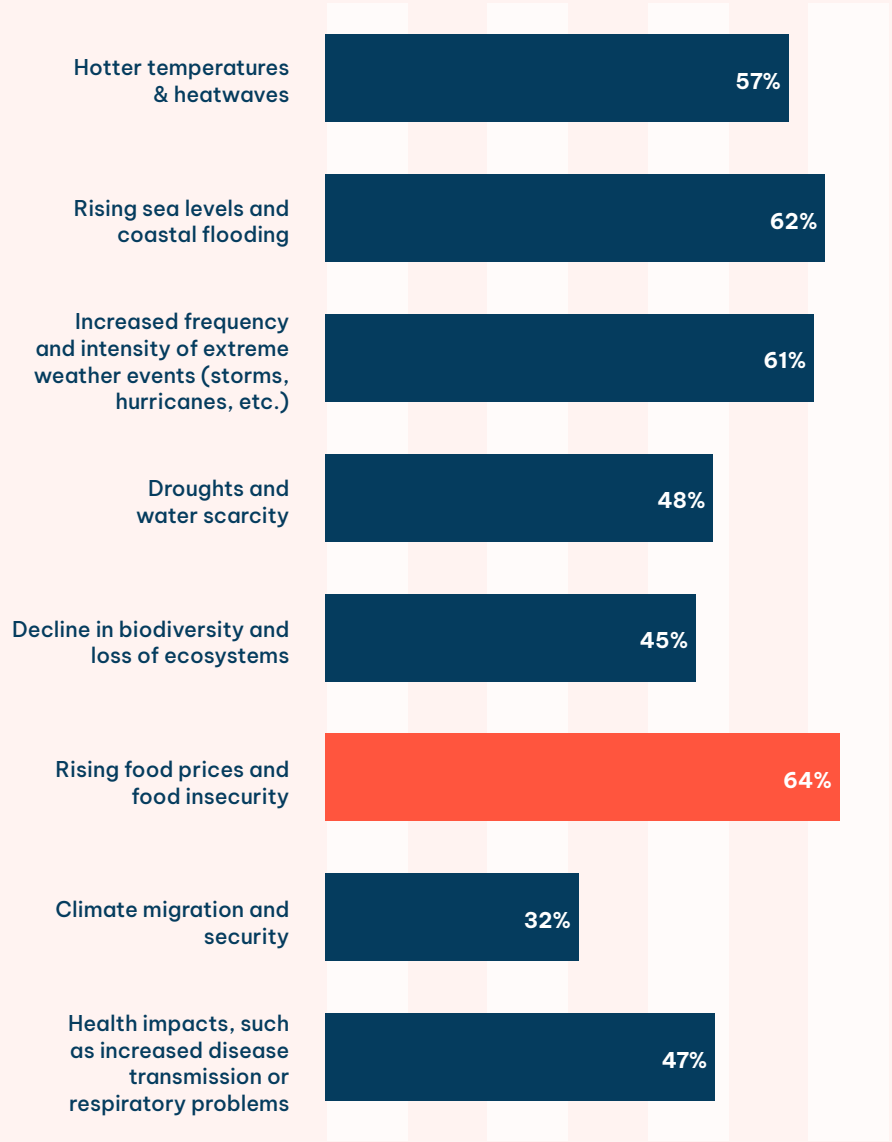
For example, when asked which aspects of climate change they were most concerned about, **the most common answer was rising food prices and food insecurity (64%)**.

Over the three years between May 2021 and May 2024 food prices in the UK have increased by 30.6%. This is more than they had previously risen in the previous 13 years, from January 2008 to May 2021.

Inflation, war in Ukraine, high fuel and energy costs, Brexit-related disruption and climate change have all contributed to this. The astonishing rise in the cost of olive oil, for example, can be directly attributed to climate change, with soaring temperatures and wildfires destroying crops across southern Europe.

Concerns about food security potentially reflect the broader economic and social disruptions experienced by UK consumers in recent years, demonstrating how climate change is increasingly interwoven with immediate economic realities.

What specific impacts of climate change are you most worried about?



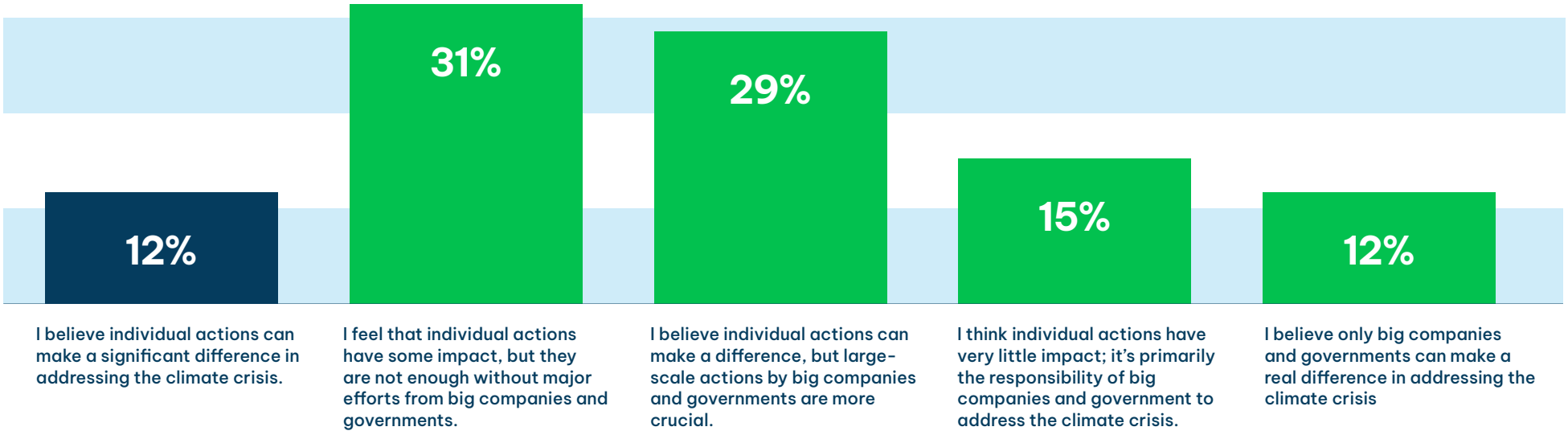
What needs to be done to tackle climate change, according to the public?

Despite widespread concern over climate change and recognition of its severity, many individuals have doubts about their ability to contribute meaningfully to its solution, leading to increasing apathy among consumers.



For example, 87% believed that 'big companies and governments' were key to tackling climate change, rather than individuals alone, on just 12%.

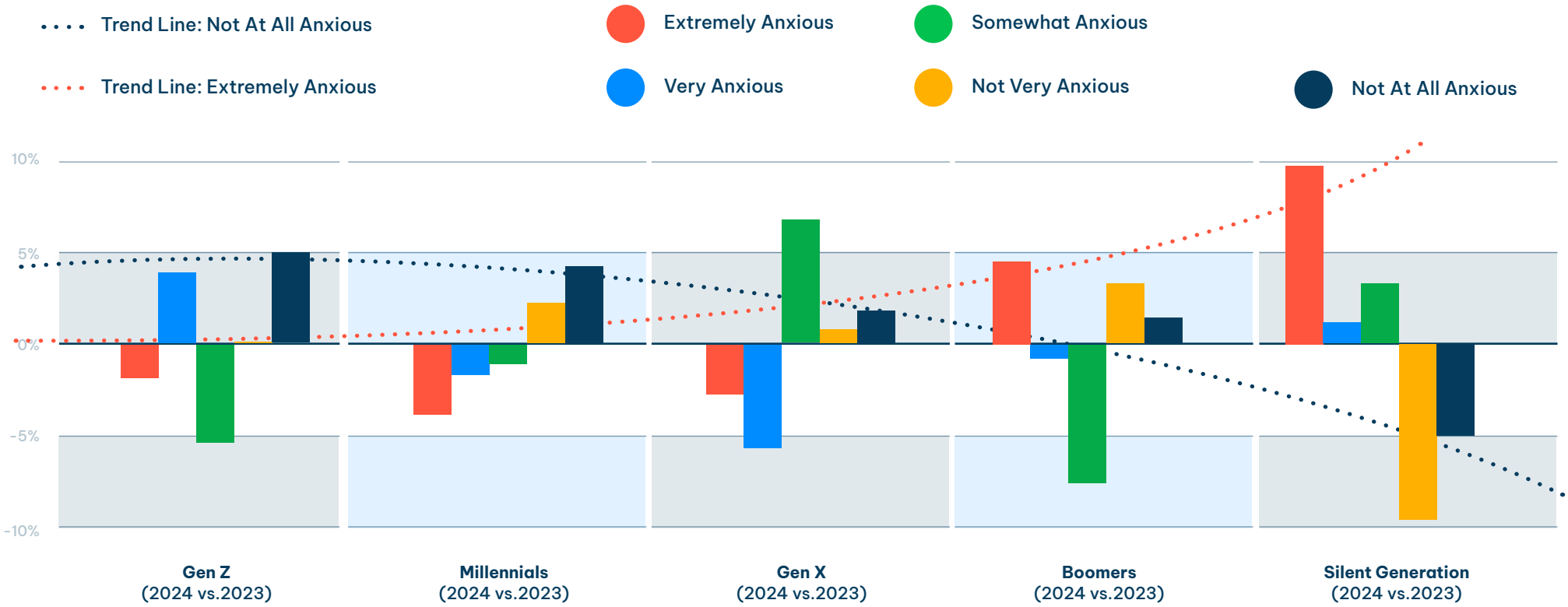
Do you feel that individual actions can make a difference in addressing the climate crisis, or do you believe it is primarily the responsibility of big companies and governments?



Interestingly, while Gen Z is more anxious about climate change, Millennials are slightly more optimistic about the impact of their own actions (90% of Millennials believe their actions can have at least some positive effect, compared with 86% of Gen Z).

How worried are you about climate change?

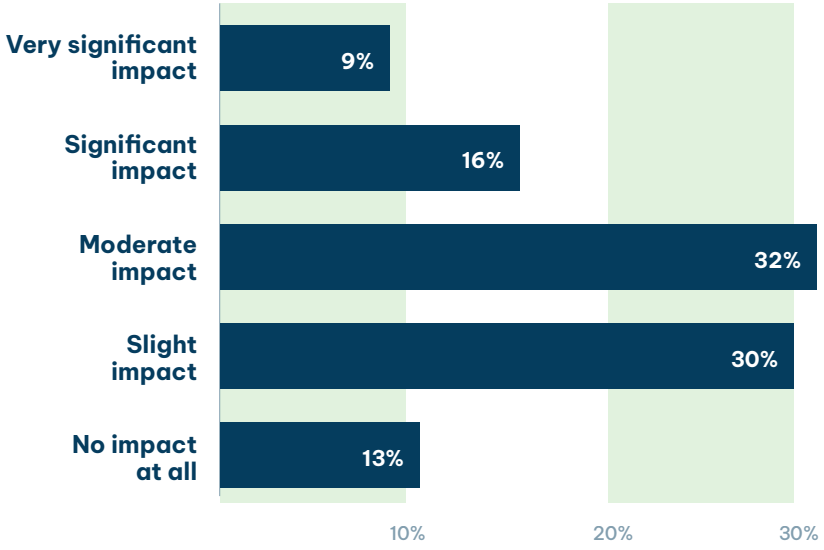
Generational Split (2024 vs 2023)



Although survey respondents in general are making positive changes to help combat climate change, the results suggest scepticism about the impact of their actions.

Overall, 87% of the UK public believed that their individual actions could have an impact on fighting climate change, with 30% believing they could have a 'slight impact', 32% saying 'moderate impact', 16% for 'significant impact' and 9% believing that their actions would have a 'very significant' impact. Meanwhile, 13% believed their actions would have 'no impact at all'.

How much do you think your actions can help fight climate change?



> **We're very worried about climate change, which is why we got involved in self builds, which utilise renewable energy.**

Sue Housley, Self-build homeowner

With more immediate, personal concerns like food and energy prices, as well as geo-political factors like the Russo-Ukrainian war and conflict in the Middle East to contend with, broader environmental concerns are perhaps overshadowed. With that, the sense of agency an individual feels about their own impact in combating climate change is also diminished.

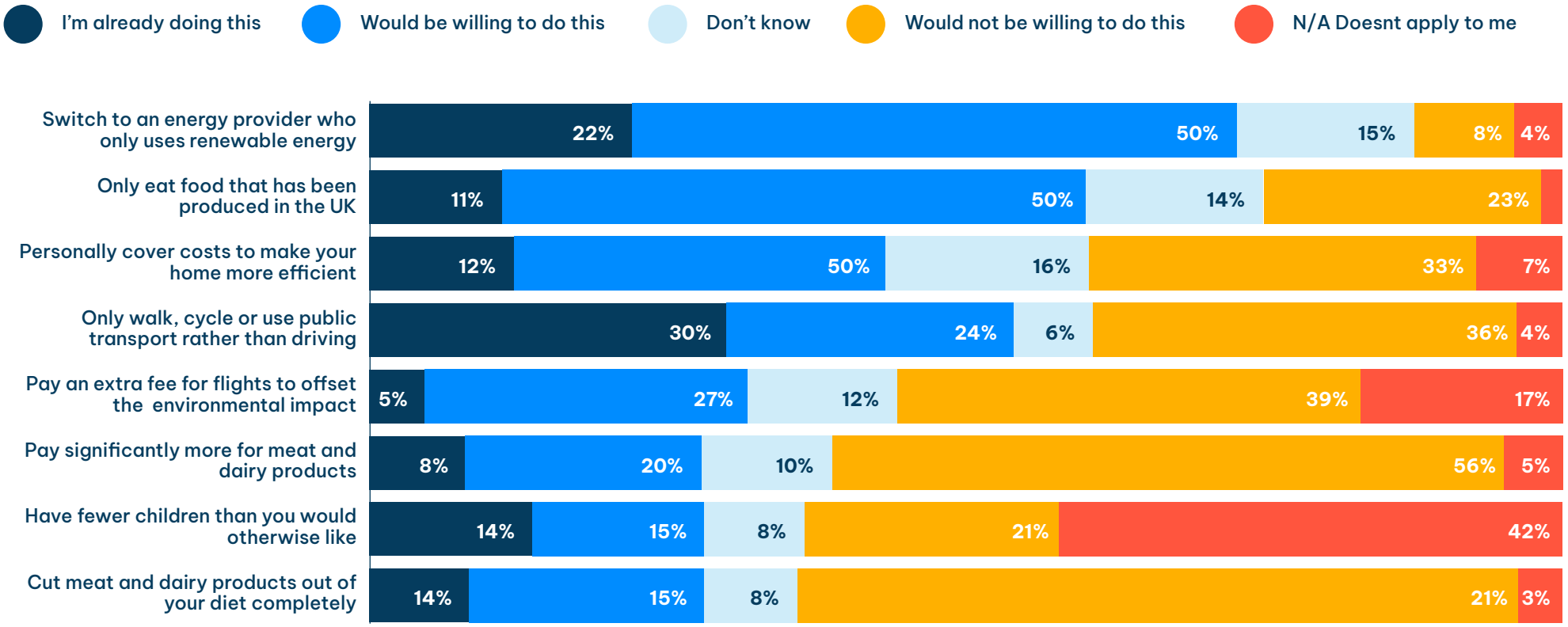
In the minds of many, the overwhelming scale of climate change requires large-scale, systemic solutions from governments and large corporations rather than from individuals.



What actions will the people take?

Therefore, with apathy about the effectiveness of individual actions in tackling climate change on the rise, what steps were respondents actually willing to take?

Taking into account the personal costs or changes to lifestyle that would be required, please say whether you would or would not be willing to do each of the following to address climate change



Switching to an energy provider that only uses renewable energy was near the top of the list, with 22% saying they had already done so, and another 50% saying they would be willing to do so.

Only walking, cycling and using public transport rather than driving was another popular step to take, with 30% saying that they were already doing this, and a further 24% saying that they would be willing to do so.

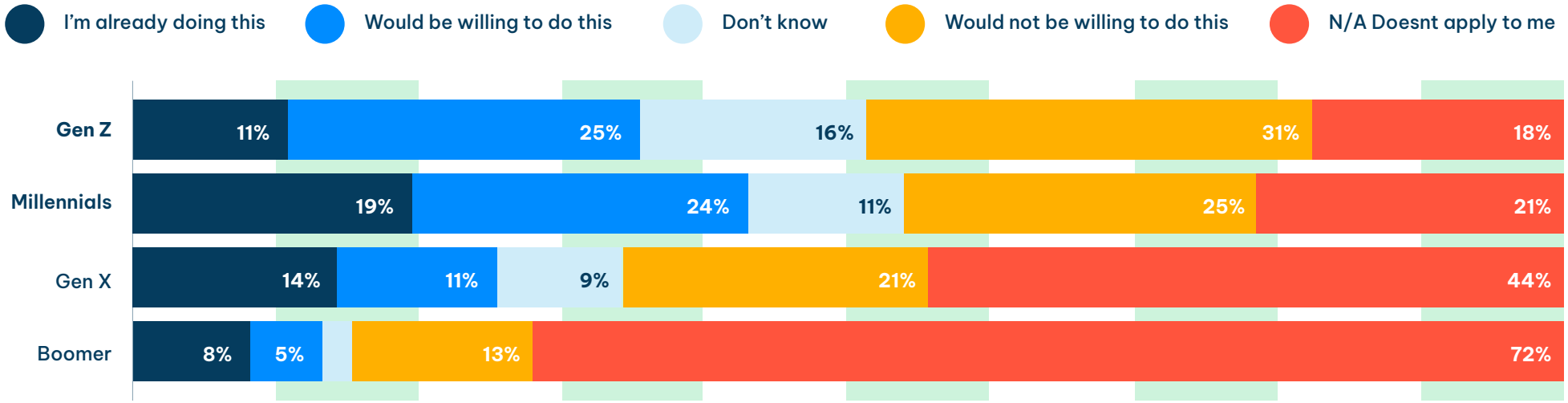
Surprisingly 14% of respondents said that they were already having fewer children than they otherwise would, with another 15% saying that they would be willing to do so. Millennials were the most likely demographic to do this for environmental reasons, with 19% already making this choice and 24% considering it.

This generation, faces economic uncertainty around the housing and job markets, which may also influence their family planning decisions.

Gen Z also show some willingness to have fewer children than they'd ideally like, with 11% already decided to have fewer children and 25% open to the idea.

Individual action to address climate change:

Have fewer children that you would otherwise like



Making green food choices

After switching energy suppliers, the next most popular choice was a willingness to limit food to that produced in the UK, with 50% of people saying they were willing to join the 11% who said they were already sticking to UK-grown meals.

The trend of growing your own food at home grew exponentially during the Covid-19 pandemic, with many planting their own fruit and vegetables. Doing so not only cuts down on shopping bills, but can reduce food miles and reduce reliance on intensive agriculture.

The cost-of-living crisis and food supply chain issues have further encouraged this, with some figures suggesting that 44% of people with a garden or allotment are growing their own food.

Giving up meat and dairy products can be one of the biggest ways to reduce your carbon footprint. However, most respondents (61%) were not willing to do this, with just 19% claiming they would give meat and dairy up and a further 9% have already done so.

Gen X was the most likely group to say they had already given up meat and dairy (14%), while Millennials were the group most likely to say that they would be willing to do it (23%).

Paying significantly more for meat and dairy products and flights were also quite strongly opposed. Overall, this reluctance underscores the challenges in aligning environmental concern with lifestyle changes that require significant personal sacrifice.

Find out more about preventing food waste in our guide to food waste facts and statistics.

How to be more eco-friendly



Hesitancy to make significant changes

Our data reveals conflicting perspectives among the public regarding personal responsibility for combating climate change. On one hand, there is general acceptance that small, personal efforts - whether using public transport, reducing energy consumption or adopting a plant-based diet can collectively make a difference.

However, the reality of translating this belief into action is less straightforward. For instance, while there is a growing willingness to invest in home energy efficiency - spurred on by rising energy costs - economic factors, such as the cost-of-living crisis, inflation and overall economic uncertainty significantly influence these decisions.

According to our survey, 84% of the public still hesitates to make significant lifestyle changes amid economic pressures. The financial burden of making homes more energy-efficient or living more sustainable lifestyles can be a deterrent, even for those committed to environmental causes.

As people grapple with immediate financial pressures, the willingness to adopt potentially costly or inconvenient lifestyle changes diminishes. This is especially true when the benefits of such changes are not immediately visible or directly felt.

> **61%** **are unwilling to consider giving up meat and dairy.**



The advent of AI

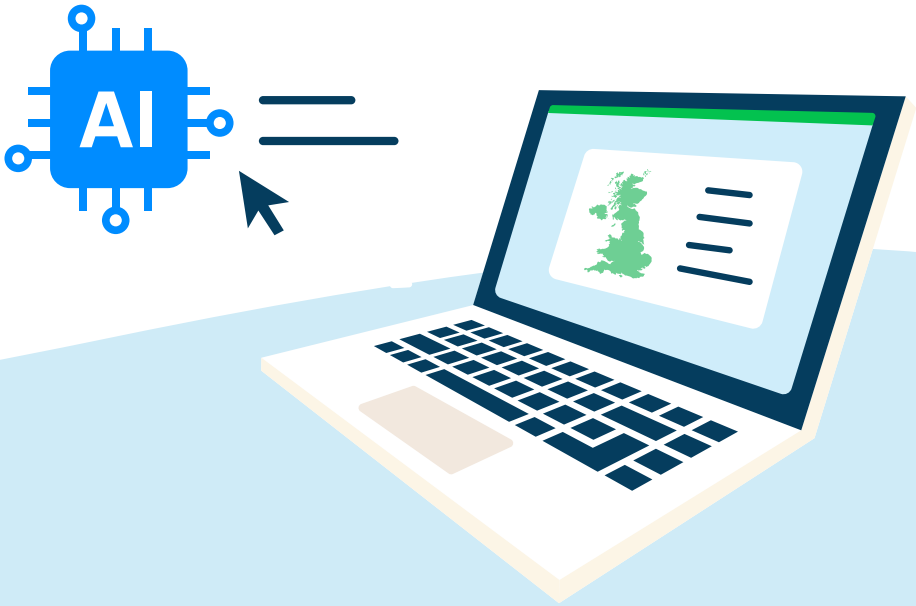
Artificial Intelligence (AI) is being adopted rapidly across multiple industries to improve work processes and business strategies. While it is increasing carbon emissions, it also has the potential to be a powerful tool in the fight against climate change.

Generative AI is much more energy-intensive than conventional computing - both in the training phase and in day-to-day use. The International Energy Agency estimates that electricity use by data centres could double from 2022 to 2026, to 1,000 terawatt hours - similar to the energy use of Japan.

However, it can also play a positive role. According to the World Economic Forum, AI has been trained to measure changes in icebergs 10,000 times faster than a human, helping scientists understand how much meltwater icebergs are releasing into the ocean.

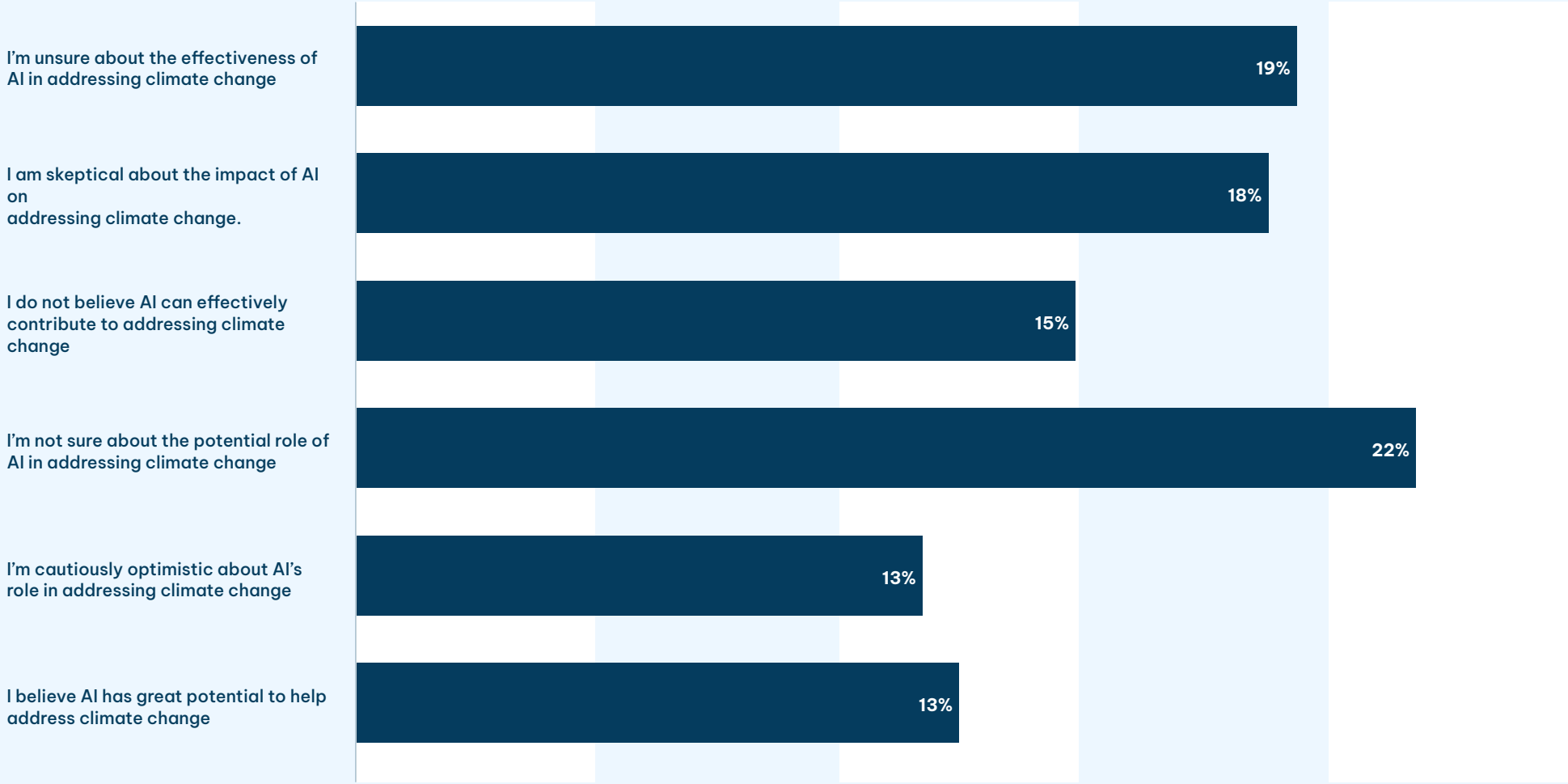
Perhaps unsurprisingly, public perceptions of AI's role in helping to fight climate change are mixed, with the majority of respondents showing signs of uncertainty.

Nearly one in five (19%) are unsure about AI's effectiveness at combating climate change. On the flip side, however, 13% are cautiously optimistic and a further 13% believe AI has great potential.



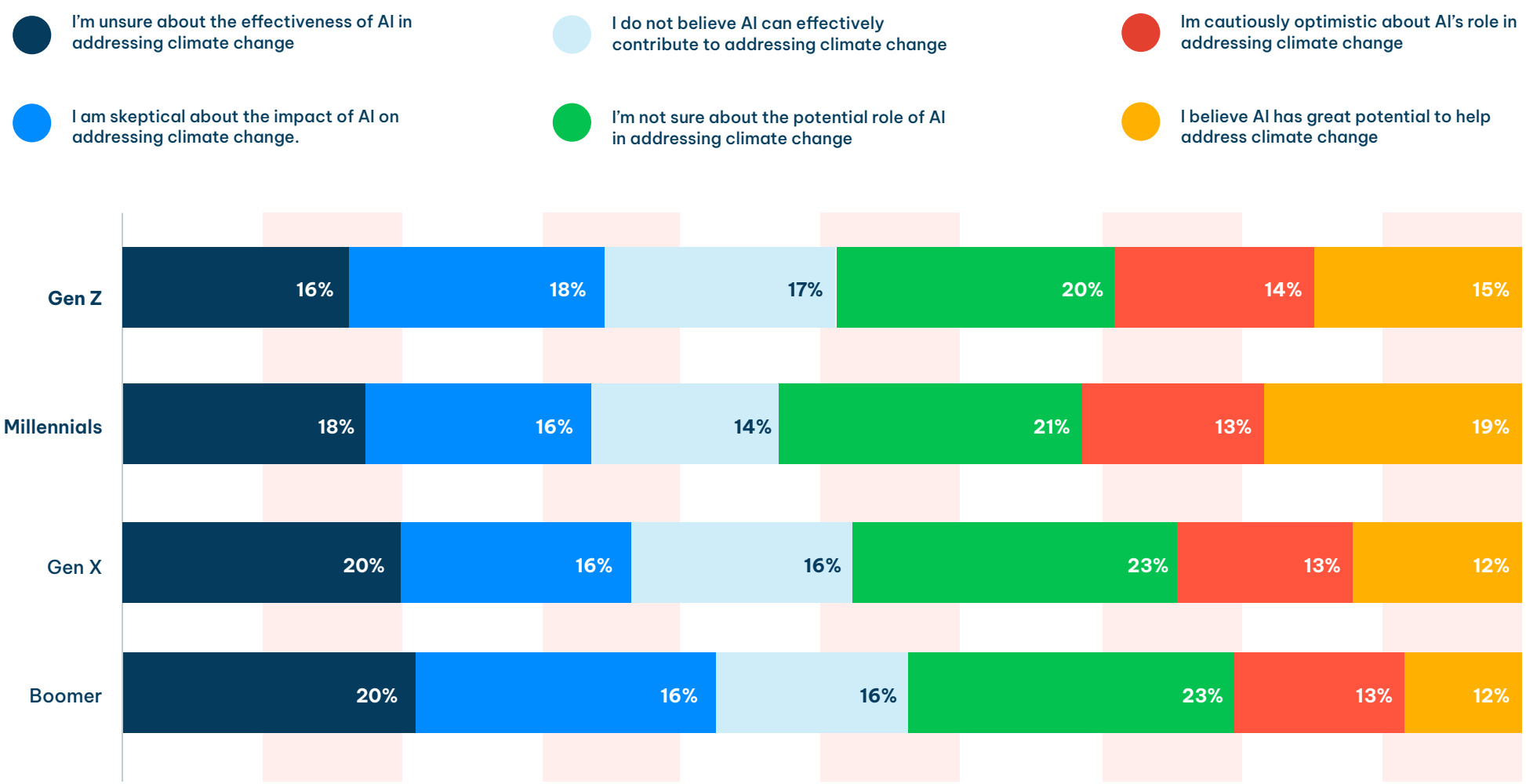
18%

How do you feel about the potential role of AI in addressing climate change?



How do you feel about the potential role of AI in addressing climate change?

Generational Divide

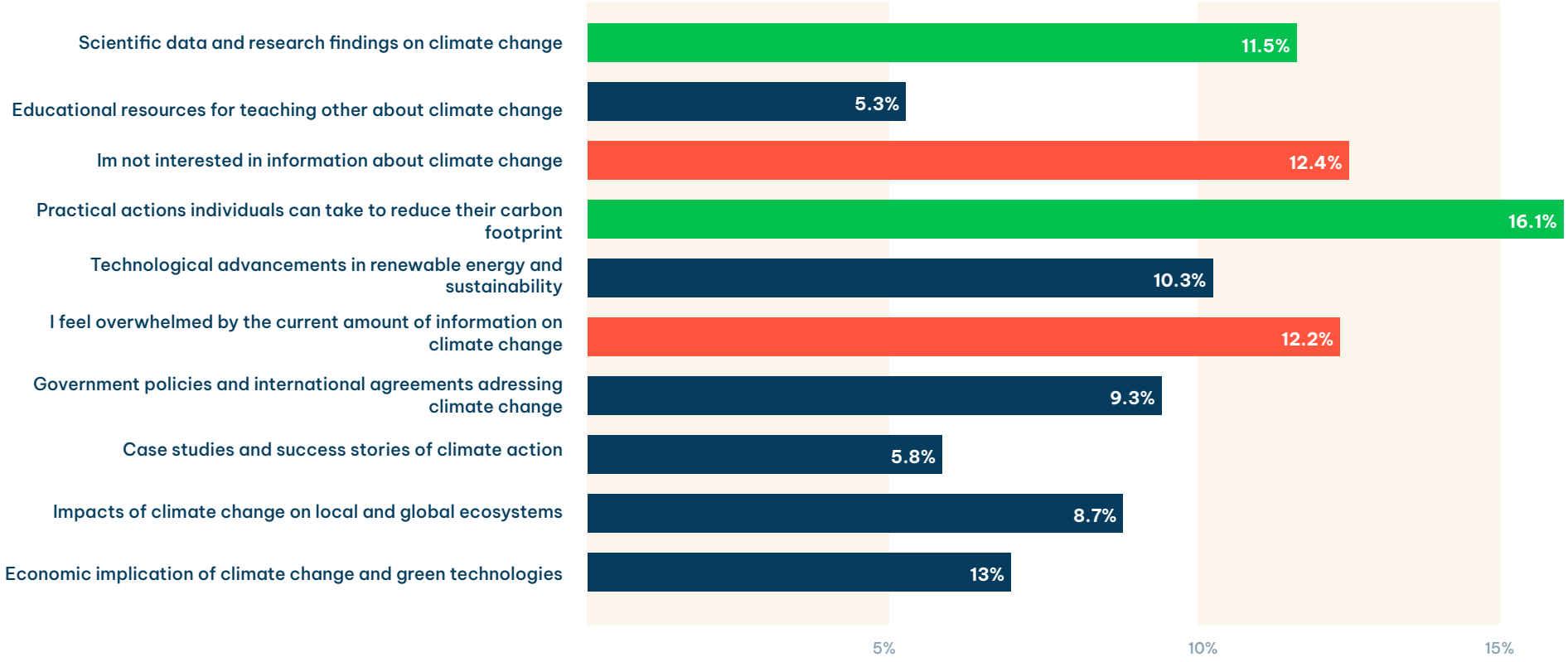


What information to people want?

When asked about the type of information about climate change they are most interested in, the biggest demand (16%) is for actionable, practical tips for individuals to implement to reduce their carbon footprint. This reflects a desire to take action to contribute to climate mitigation.

More concerningly, 12.4% of people say they were not interested in information about climate change at all, whereas 12.2% said they were overwhelmed by the current amount of information about climate change.

What type of information about climate change are you most interested in?



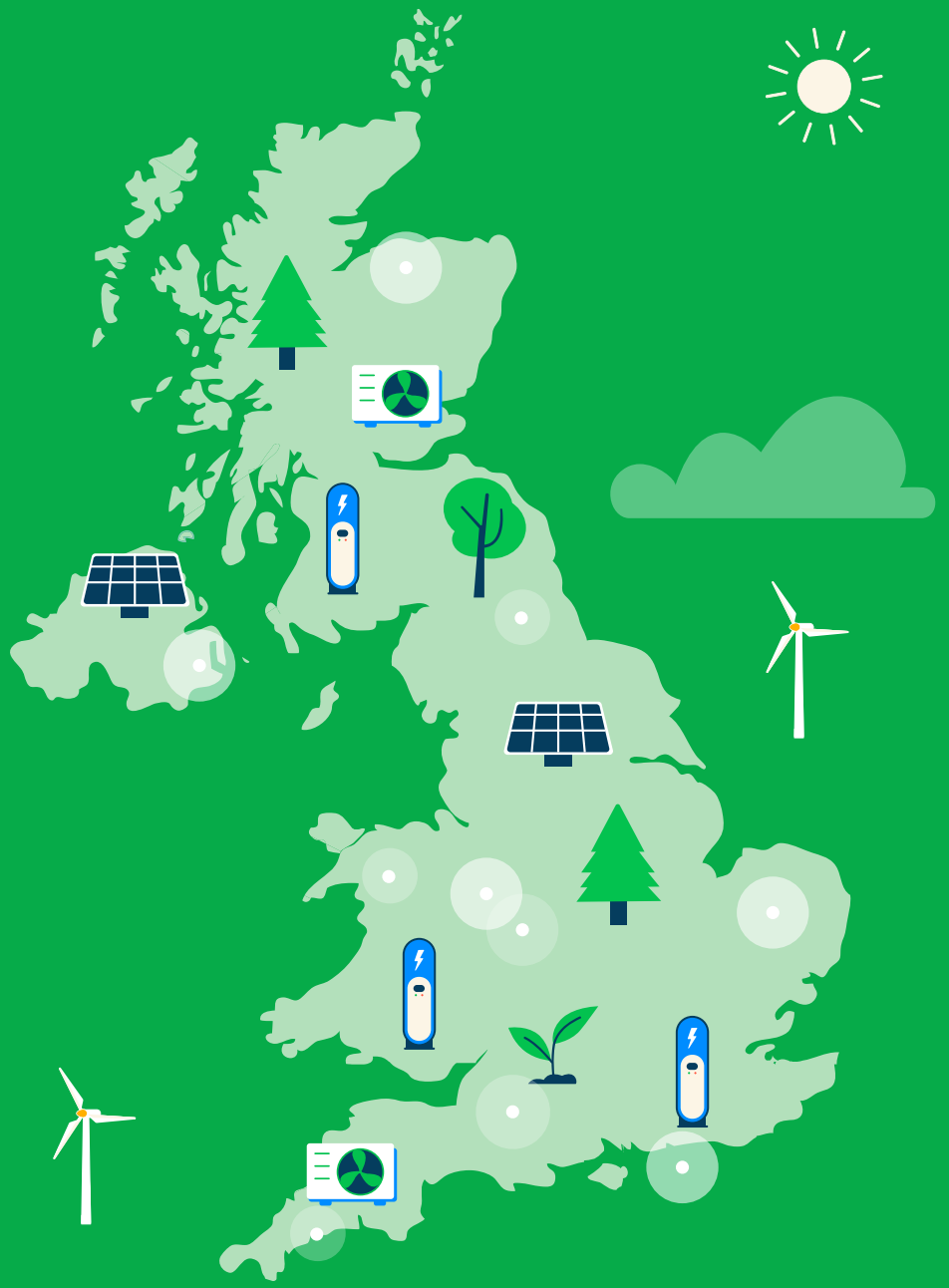
This adds to the mixed picture seen elsewhere in this report, where people recognise the importance of climate change, but they feel somewhat powerless to do anything about it.

> **We started to invest in renewable technology because we wanted to do something that would combat the enormity of the climate change issue. Climate change is a huge deal, even more so for our kids and it's very frustrating. There seems to be so little international agreements and effort to actually do anything about it, which is a huge concern. But it's been good to see the way that the energy transition has quickly gathered pace.**

Peter Gibbs, Homeowner

Part 3

Attitudes towards government policy and activity



Part 3: **Attitudes towards government policy and activity**

The UK government is making positive changes towards combating climate change.

For example, within its first few weeks, the new Labour government lifted the de facto ban on new onshore wind farms in England.

Despite some positive changes from the UK government, our survey shows that the public feels more can be done. The limited belief in the impact of individual actions as discussed in Part 2 highlights a communication challenge that needs to be addressed.

Government and businesses need to emphasise the cumulative impact of individual actions and how these efforts can drive broader societal change. By shifting the narrative from individual insignificance to collective power, there's an opportunity to empower individuals to take more proactive steps in their everyday lives.

Take recycling, for example. The latest official statistics show that England's recycling rate was at 43.4% in 2022 - which is actually a 0.7% decline from 2021.

Plastic Expert (a plastic recycling company) commented on the Defra stats: *"The fall in recycling rates across the UK presents the need for new recycling initiatives, better waste management infrastructures, and encouragement across local authorities."*

The UK government noted the decline in public interest and updated how waste is collected, which was introduced in May 2024. The new recycling collections mean councils are now able to collect plastic, metal, glass, paper and card in one bin, in a bid to reduce confusion on what can be recycled, and what ends up in landfill.

As we've seen, there is a high level of interest and demand for LCT, but investment and more widespread adoption is hamstrung by a lack of financial support, as well as a lack of communication about the grants that are available.

It's clear that there are information and affordability gaps. What role does the Westminster government play in bridging this gap and encouraging the implementation of LCT?

What did the parties promise at the general election?

The general election demonstrated how important energy and sustainability have become, as fuel bills, energy security, and fighting climate change were key policy points for most of the parties.

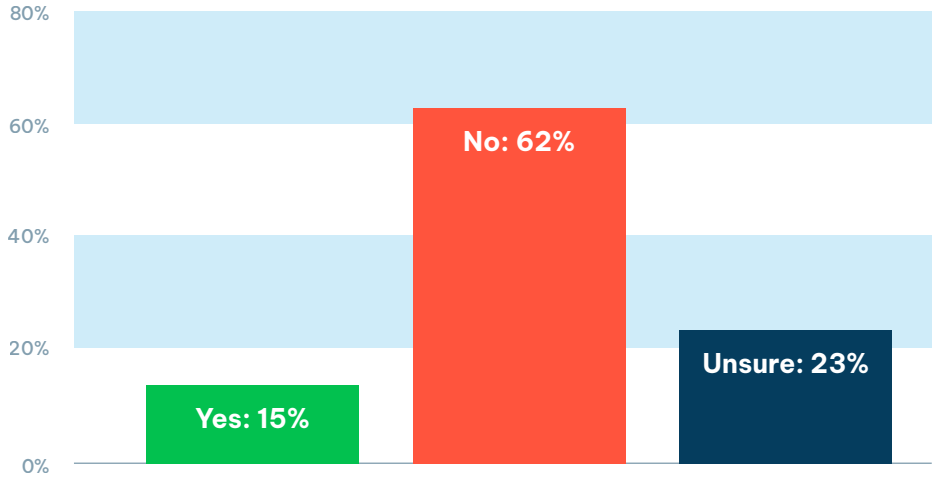
Labour promised in its pre-election manifesto to turn the UK into "a clean energy superpower" and to keep energy bills "permanently low". It also promised to launch GB Energy, a new publicly-owned company that will help the UK become energy independent.

Most parties prior to the 2024 general election committed huge amounts of investments to ramp up the UK's clean energy capability and capacity. The biggest commitment, unsurprisingly, came from the Green Party, which promised £40 billion to drive fossil fuels out of the UK.

What does the public think about government action on the environment?

Our survey was conducted before the general election in July, so this data doesn't reflect government policy changes since then. However, the consensus (62%) from our respondents is that political parties were not doing enough to reduce carbon emissions. A further 23% said they were unsure and just 15% agreed that they were doing enough.

Do you believe the main political parties in this country are doing enough to help reduce carbon emissions?



Further Reading:

Understand the environmental commitments of different UK political parties in our guide on UK political party stances.

Learn more about initiatives like the Green Deal and how they aim to promote energy efficiency in our explainer on Green Deals.

Regional differences

This dissatisfaction with government policy was felt across all regions, with significant variations.

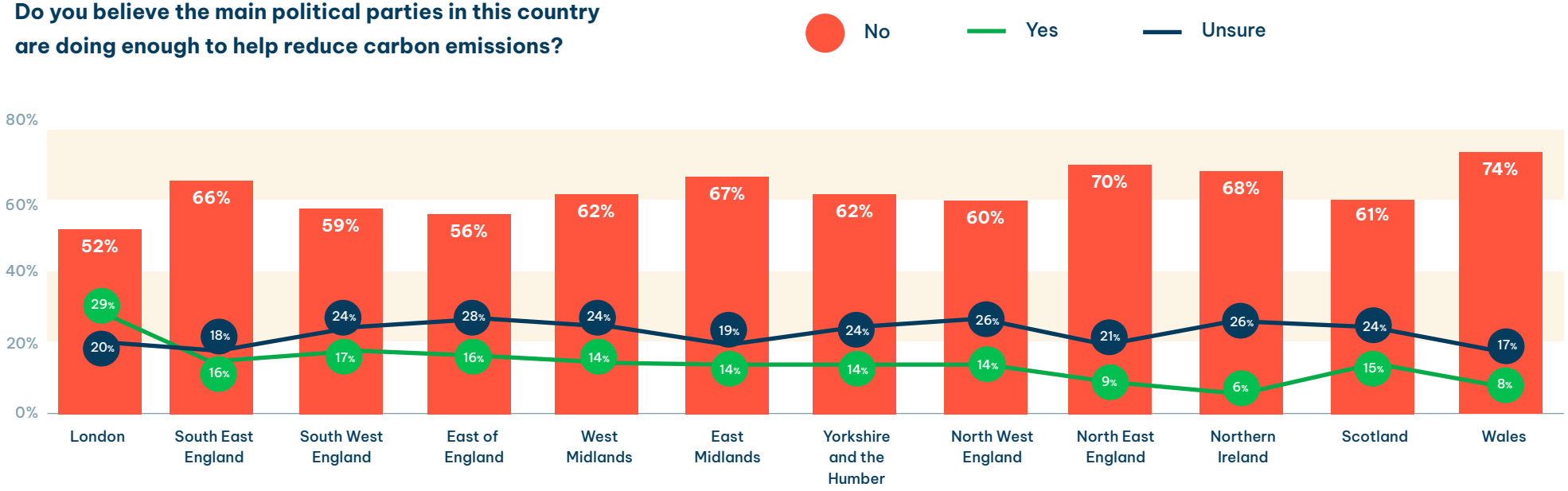
The region most dissatisfied was Wales, where 74% of respondents said they did not think the main political parties were doing enough. This was followed by North East England and Northern Ireland, where 70% and 68% of respondents respectively said they did not believe political parties were doing enough to help reduce carbon emissions.

In London, only 52% of people said the political parties were not doing enough, making it the region with the least pessimistic view of the government's carbon emissions reduction policy. Perhaps this is a reflection of initiatives like the Ultra-Low Emission Zone (ULEZ), which have been strongly opposed in the capital's outer boroughs.

Overall, the significant dissatisfaction highlights a sizable gap between the public's expectation and a perceived lack of action from politicians.

Regional Segmentation

Do you believe the main political parties in this country are doing enough to help reduce carbon emissions?



What role can devolution play?

The level of public discontent can be taken as a nationwide call for stronger sustainability policies and also for devolved and local governments to be more empowered to take action.

This was reflected in the manifesto promises of Plaid Cymru and the Scottish National Party (SNP), both of which called for more power to be devolved.

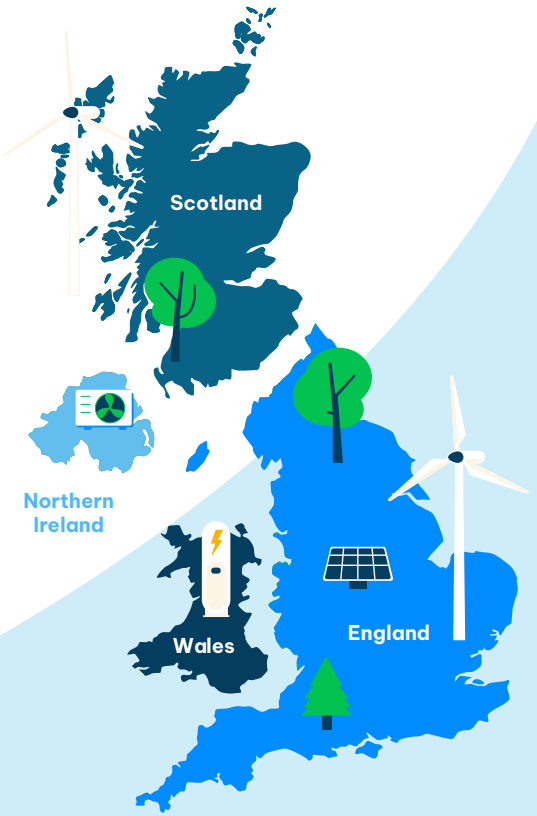
Plaid Cymru's manifesto called for the role of Ofgem to be devolved more to Wales to enable the building of local energy supply chains and projects. This would in turn enable community-owned energy generation, which would help cut bills. Plaid Cymru also has an ambitious target to achieve net zero for Wales by 2035, 15 years earlier than the UK government target.

The Scottish National Party wants powers over energy regulation, pricing and production to be devolved to Scotland, as well as significant growth in renewables, storage, hydrogen and carbon capture. It also wants to end the import and sale of new buses which are not zero-emissions, by 2025.

Our survey results suggest that allowing local authorities and devolved governments - either council or city - to implement their own environmental measures and community generation projects could improve public confidence as well as contributing to net zero goals.

While there would need to be central government oversight to ensure cohesion, devolving more power could help local authorities encourage and enable higher levels of LCT adoption.

It could particularly help renewable technologies that are more suited to a whole community, rather than a single household, such as wind turbines, which rank very low on the list of clean energy tech that people have or plan to purchase. Private sector initiatives, such as Ripple Energy's wind projects, give people a chance to invest in their own sources of clean energy.

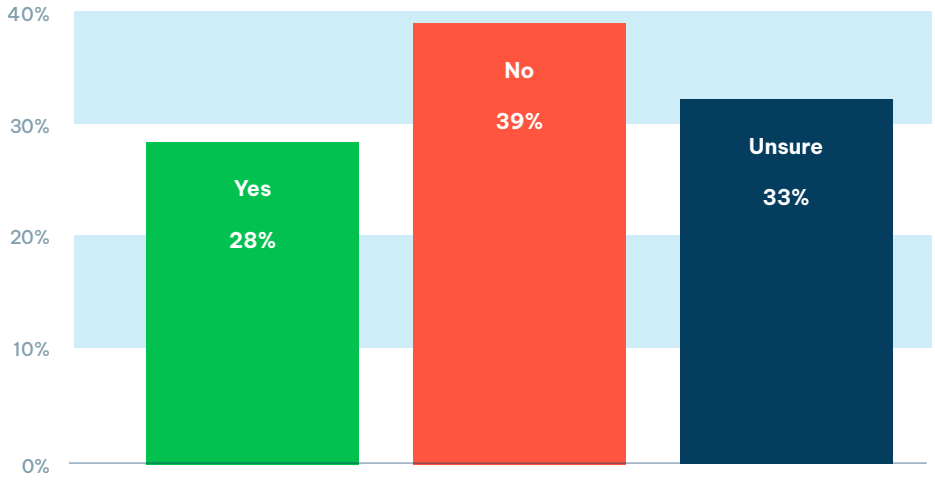


Public attitudes to a new government

There is a scepticism of the government's efforts to cut carbon emissions, regardless of which party is in Westminster.

When asked if they believed a new government would have a significant impact on reducing carbon emissions, 39% of people said no, while only 28% said yes, underlining the lack of confidence in the government's ability to pursue sustainability.

Do you believe the new government would have a significant impact on efforts to reduce carbon emissions?



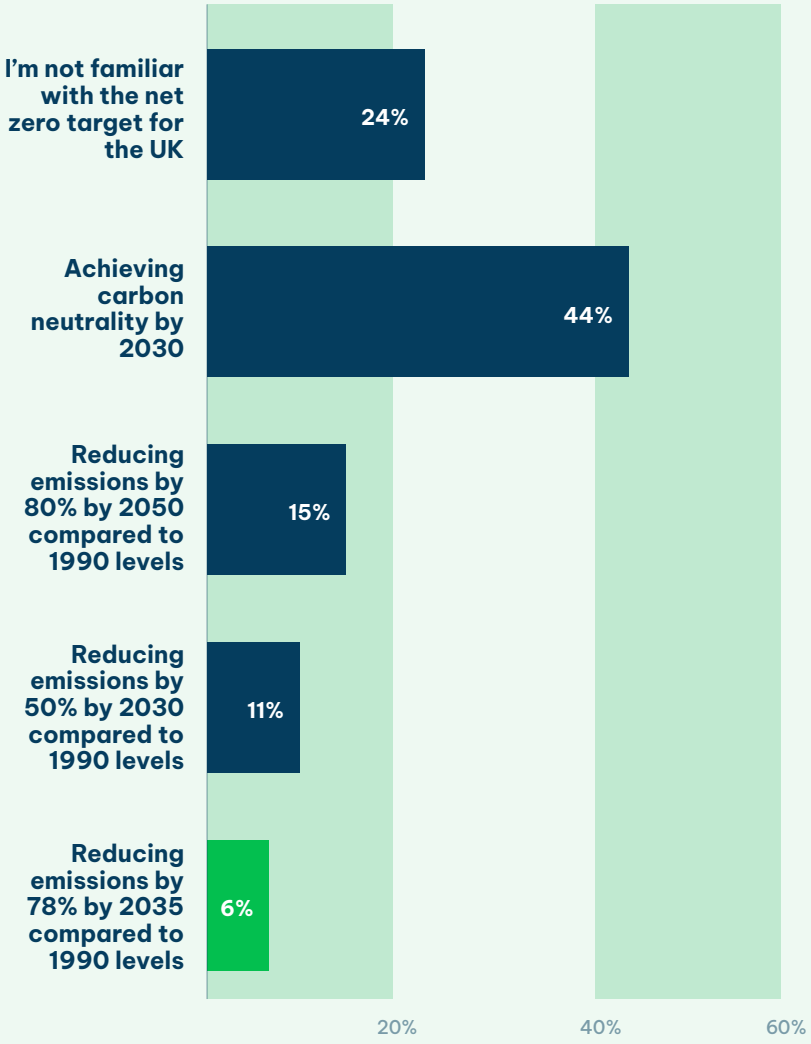
This lack of confidence could affect the adoption of LCT and ultimately the UK government's sustainability strategy. However, the 33% of people who were unsure suggests that **there is an opportunity for the government to set out a clear and tangible sustainability strategy which will win over those who feel uncertain.**

Figures also suggest that the UK public have limited understanding of what the government's net zero target means in practice. Converting the awareness of LCT and the desire from consumers to cut energy bills into engagement with the government's net zero ambitions is both a challenge of communications and policy.



18%

What does "net zero taget' mean in relation to climate change in the UK?

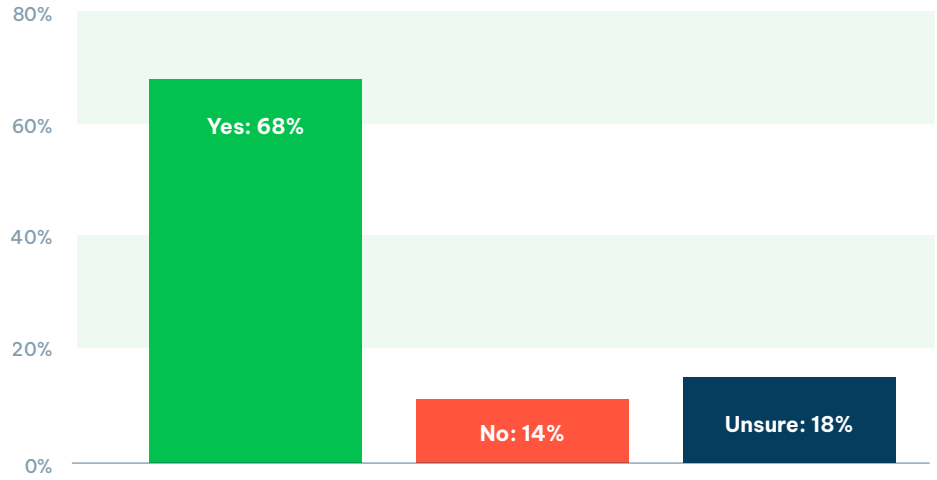


What needs to happen now?

The UK needs grants and schemes that allow communities to adopt clean energy technologies by overcoming the upfront costs, and then clear communication of how those grants can help cut bills and contribute to overall UK sustainability targets.

There is a desire from the public for the government to do more in regards to sustainability, especially if policies directly help with their energy bills.

Do you believe the incentives or rebates should be offered by the government for purchasing energy efficient appliances or making home-improvements?



A large majority - 68% - believe that the government should offer tax incentives or rebates for buying energy-efficient appliances or making home improvements.

This suggests that existing schemes are not enough to overcome the financial barriers to decarbonising the UK. Perhaps it also reflects a lack of awareness of what is currently available.

The strong demand for financial incentives suggests that without such support, many UK households could potentially struggle to overcome the upfront costs of adopting LCT. While the cost-of-living crisis has increased the desire to reduce energy bills, it has also made consumers less able to invest in LCT.

Reducing energy bills is particularly pressing for the estimated 6.5 million people living in fuel poverty in the UK (as of January 2024) - an increase from the 4.5 million in 2021. The planned removal of the Winter Fuel Payment from many pensioners may make consumers more conscious of their energy bills than ever.

Overcoming both the energy and cost-of-living crisis will require widespread investment and adoption of LCT, but this is being held back by upfront costs and low levels of understanding what government help is available among those who might need it most.

It also reflects the public's broader concern about climate change, as well as a willingness to engage in energy-efficient practices, as long as there is financial assistance on offer.



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