
LCT Tracker: Wave 7 Results

Wave 7 - April 2025



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IMPACT
FROM INSIGHT TO INFLUENCE

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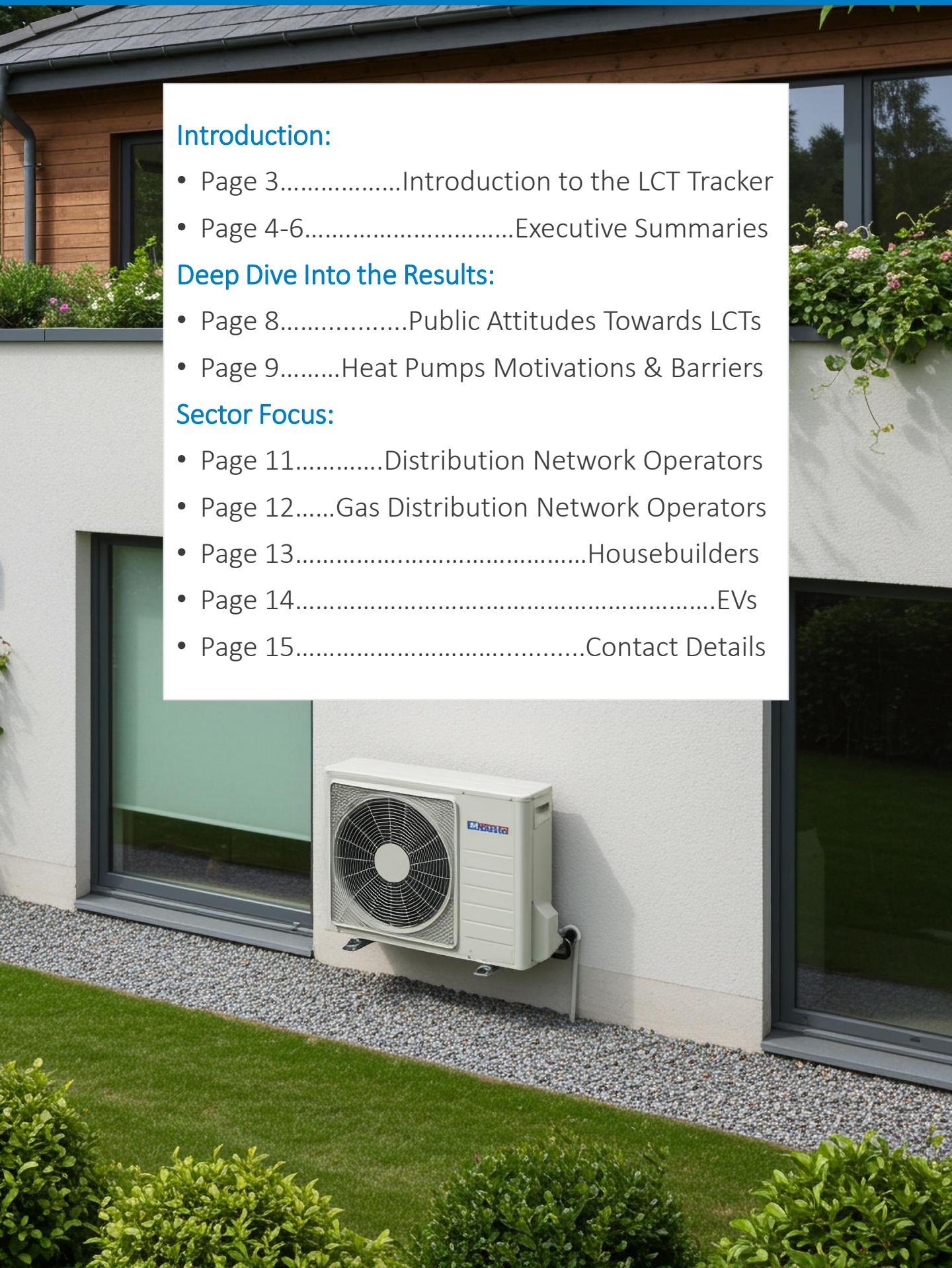
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Introduction to the LCT Tracker

Our Low Carbon Technology (LCT) Tracker is a key tool for understanding how perceptions of low carbon technologies evolve and plays a crucial role in supporting businesses on their path to net zero. Launched in Spring 2022, the tracker runs every Spring and Autumn, collecting data from a nationally representative sample. To date, we have completed seven waves, with the most recent in April 2025, surveying 1,009 consumers across Great Britain.

As the UK works to meet its ambitious net zero targets, the insights provide valuable intelligence on consumer attitudes, adoption barriers and the growing demand for low carbon solutions. Clients across various sectors have also used additional boost samples and bespoke modules to explore regional priorities in greater depth.

By participating, your business gains access to critical data to inform strategies, drive innovation and align with UK decarbonisation goals. Contact us to learn how our research can support your journey towards a more sustainable future.



Executive Summary (1)

This report provides key insights into consumer attitudes towards LCTs as the UK moves towards net zero. Our findings show growing awareness of climate change but also challenges in translating this into action. While there is strong political will to achieve net zero, economic pressures and generational divides are significantly influencing consumer behaviour, with affordability remaining a major concern.

Net Zero Targets vs Economic Challenges:

The UK government's net zero targets, including the phase-out of petrol and diesel vehicles by 2035, are putting pressure on manufacturers and consumers to act sustainably.

However, the cost-of-living crisis continues to cause financial strain for many consumers, resulting in a preference for low-cost and low-effort LCTs.

Dominance of Gas Boilers:

Gas boilers remain the most common heating system, with 74% of households still using them. This number rises to 83% among those aged 55+.

Heat pumps, while gaining traction, are still not widely adopted. Nearly one-third of respondents would consider installing one, but gas boilers remain the preferred option for consumers.

The generational divide is clear: 55% of those aged 55+ would consider a new gas boiler (vs. 25% for 18–34-year-olds), while only 24% of the 55+ age group would consider a heat pump (vs. 33% for 18–34-year-olds). This highlights the challenge of engaging older homeowners in the transition to low carbon alternatives.



Executive Summary (2)



Affordability and Unfamiliarity of LCTs:

Affordability remains a significant barrier to LCT adoption. Technologies that require minimal upfront investment and disruption, such as LED bulbs, loft insulation and heating controls are the most widely adopted, with over half of respondents already using these.

However, more expensive LCTs, such as solar panels, home batteries and heat pumps, remain less widely adopted, largely due to concerns over high upfront costs, which are exacerbated by the current economic environment.

Unfamiliarity also remains a challenge to LCT adoption, with many consumers hesitant to invest in technologies due to concerns about installation complexity and reliability.

Trust and Perceptions of DNOs:

DNOs face somewhat low public trust, with only 45% of consumers trusting DNOs to provide impartial advice on energy supply and usage. This lack of trust is concerning, as DNOs play a critical role in guiding consumers through the energy transition. This underscores the need for clear communication and transparency in DNO initiatives to encourage greater consumer engagement.

Executive Summary (3)

Perceptions of GDNs and Their Role in Decarbonisation:

The public's perception of GDNs could be improved, with only 44% believing that GDNs are making meaningful contributions to net zero. Consumers suggest that GDNs should focus more on renewable alternatives, such as hydrogen and reduce their environmental impact. Expectations around the transition from fossil fuels to sustainable alternatives are high, meaning GDNs must act.

Housebuilders and Low Carbon Features in New Builds:

Demand for energy-efficient new builds is on the rise, driven by growing environmental awareness, rising energy costs, and government regulations aimed at reducing carbon emissions.

Homebuyers are increasingly seeking properties that are not only comfortable and modern but also cost-effective to operate and environmentally friendly. The most integrated low carbon features include solar panels and energy-efficient lighting.

However, while these energy-efficient measures are desirable in principle, they do not yet translate into a significant price premium in the housing market. Buyers may value the long-term savings on energy bills and the environmental benefits, but this is not always reflected in their willingness to pay more upfront.



Growing Interest in EVs Despite Barriers Persisting:

Interest in electric vehicles (EVs) is growing, with around a third of vehicle owners (34%) considering one for their next purchase. However, key barriers remain, including high upfront costs, concerns over battery life and limited charging infrastructure.

Concerns about access to public charging, particularly in lower-income and rural areas, pose a significant challenge to the wider adoption of electric vehicles and to achieving the UK government's goal of all new cars being zero-emission by 2035.

Deep Dive Into the Results...



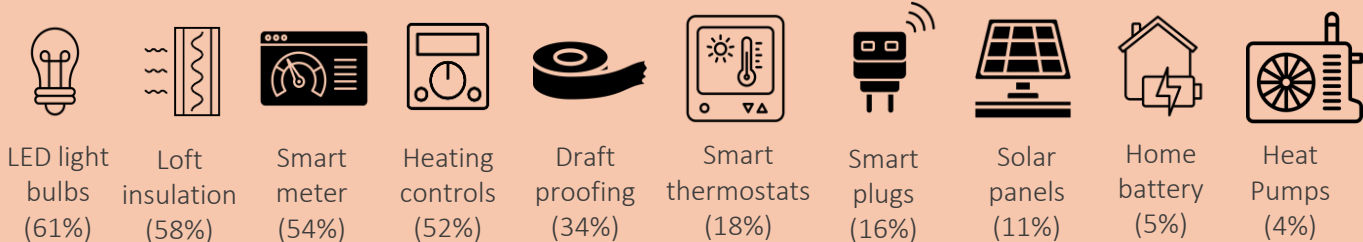
Public Attitudes Towards LCTs



Mains gas boilers remain the most common heating system in British homes, with 74% of people reporting they have one. This rises to 83% among those aged 55+, reflecting a strong preference for familiar and dependable technology.

While gas boilers are reliable, their widespread use poses a challenge to the UK's net zero goals. The Government aims to phase out fossil fuel heating in new homes by 2035 as part of its wider decarbonisation strategy. However, uptake of low carbon alternatives like heat pumps remains low, especially among older households. Encouraging this shift will require clearer guidance, financial support and improved public confidence in new technologies.

LCT consumers currently have:



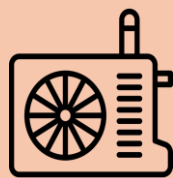
Smaller, more affordable LCTs are driving adoption in UK homes, with over half of households using measures like LED bulbs, loft insulation, smart meters, or heating controls. These solutions reduce energy bills and are easy to install with minimal disruption, making them attractive first steps for households on their low carbon journey. They also rank highest for future consideration, indicating that cost and convenience are key drivers of adoption. This aligns with the UK government's focus on energy efficiency as the foundation of its home decarbonisation strategy.

However, the uptake of more expensive LCTs, such as solar panels, home batteries, and heat pumps remains limited. While awareness of these technologies is improving, they still sit low on the priority list for many, primarily due to **high upfront costs, long payback periods, and uncertainty over long-term savings**. For the UK to meet its renewable energy and net zero targets, greater financial support and clearer guidance will be needed to help households make the leap from small changes to more transformative upgrades.

Heat Pumps Motivations & Barriers

Among low carbon heating options, just one in three respondents (30%) indicated that they would consider installing a heat pump if their current heating system needed to be replaced in the next 1-2 years. The top motivations for adopting a heat pump include:

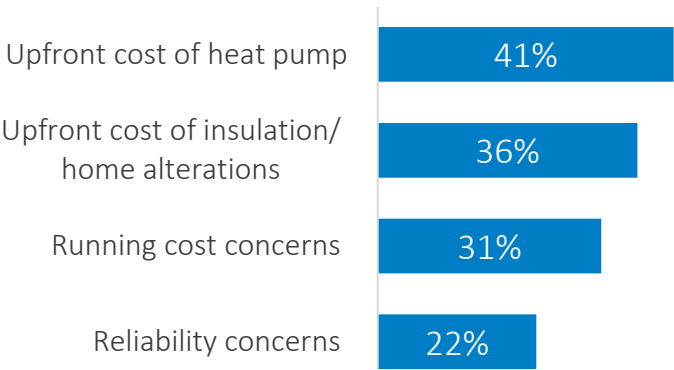
- Climate change/ environmental concerns (42%),
- Expecting them to become more readily available and common in the future (38%),
- Recent increases in energy costs (28%).



One in three
would consider
installing a heat pump

However, financial concerns and reliability issues remain the top barriers to adoption, suggesting that while the demand for heat pumps is rising, significant challenges lie ahead in making them accessible and practical for the average consumer.

Top Barriers for Heat Pumps:

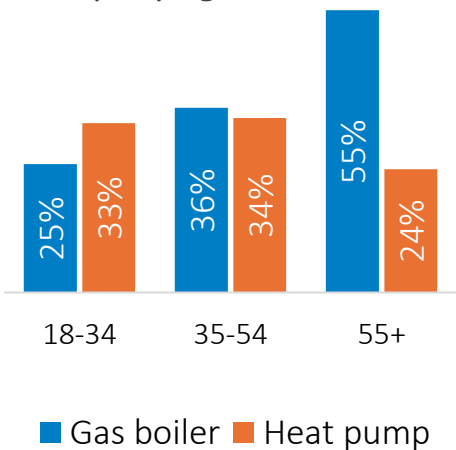


As a result of these barriers, **gas boilers remain more popular overall**, with 40% still open to installing one in the future.

The generational divide is evident, with 55% of those aged 55+ considering a new gas boiler, compared to just 24% who would consider a heat pump.

This suggests that while there is some interest in low carbon living, real change will require more than just awareness. Trust in new technologies, ease of installation and affordability will be crucial to shifting behaviours, particularly for older homeowners.

Consideration for Heat Pumps by Age:



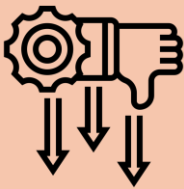
Sector Focus...



District Network Operators



49% believe DNOs are contributing to help the UK reach net zero



18% believe DNOs are not contributing to help the UK reach net zero



Public perceptions of District Network Operators (DNOs) show that more needs to be done to build awareness and trust in their role in the UK's net zero journey. **Only half believe DNOs are making a meaningful contribution to decarbonisation.**

This matters, as DNOs are expected to take on a more visible, proactive role, not only in maintaining infrastructure, but also in supporting households through the energy transition. As decarbonisation policies accelerate, DNOs must strengthen public understanding of their role and demonstrate how they are helping deliver a lower carbon, resilient energy system.

“Help with education and provision of alternative solutions to the energy needs of people, thereby enabling them to reduce their individual carbon footprint.”

Consumers who felt DNOs should do more called for increased use of renewables, more transparent communication, fairer pricing, stronger grid investment and better support for greener household choices. This reflects a public desire for DNOs to play a more active, visible role in both technical upgrades and consumer engagement and support.



45% trust their local DNO to provide impartial advice on energy supply and usage.

Fewer than half said they trust their local DNO to provide impartial advice on energy supply and usage.

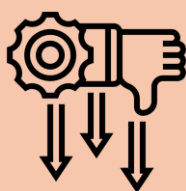
As DNOs take on a more visible role, such as helping households adopt heat pumps, managing demand with smart technology or integrating Evs chargers, this trust gap could hinder progress and reduce the impact of consumer-facing initiatives.

Closing this gap will require clear communication, transparency, and a stronger connection to the needs and concerns of local communities.

Gas Distribution Network Operators



44% believe GDNs are contributing to help the UK reach net zero



22% believe GDNs are not contributing to help the UK reach net zero

Public opinion is more divided on the role of Gas Distribution Network Operators (GDNs) in supporting the UK's net zero goals. Only **44% believe GDNs are making a meaningful contribution**, while a third are unsure and a fifth feel they're not contributing enough, or at all. This uncertainty suggests a lack of visibility or understanding regarding GDNs' role in the energy transition, which may need to be addressed to build public trust and support as the UK moves towards net zero.

Among those who feel GDNs should be doing more, several clear priorities emerged. People want a shift away from fossil fuels toward renewable alternatives, more transparent communication, reduced environmental impact and greater support to help customers cut their own emissions.

These expectations suggest the public wants to see GDNs take a more active and forward-looking role in infrastructure and drive the transition to a lower carbon energy system.

"I would like to see them diversifying into renewable energy."

"They should be transparent about their plans for net zero and engage with the public to build understanding and support."

Trust in GDNs is mixed. **While 43% said they trust their local GDN to provide impartial advice on energy supply and usage, 18% do not.** This leaves a sizeable portion of the public either uncertain or lacking confidence in the information provided.

As GDNs take on a more visible role in the UK's transition to net zero, engaging the public on topics like hydrogen trials, energy efficiency, and home heating, building trust will be crucial. A lack of trust could limit the reach and impact of future initiatives, particularly as public understanding and participation become increasingly important in meeting decarbonisation targets.



Housebuilders

One in five had ever purchased a new build property, with more than half of these having done so more than ten years ago.

The reasons for purchasing a new build have shifted over the past decade. Among those who bought a new build 10 or more years ago, the most common reasons were a better location (46%), the absence of a property chain (40%), and a preference for the modern layout/ design (39%). However, among those who bought

a new build within the last 10 years, a modern layout and design (40%) remains a key factor but energy efficiency (43%) and lower maintenance costs (41%) have become increasingly important in decision-making.

Solar panels, double/triple glazing and energy-efficient light bulbs were seen as the most attractive low carbon features in new build homes, reflecting growing interest in energy efficiency. While around two-thirds would expect to pay less for a home without features like solar panels or triple glazing, for items like LED bulbs and EV chargers, many don't see them as affecting property value. This suggests that while LCTs are appreciated, some are not yet seen as adding clear financial value.

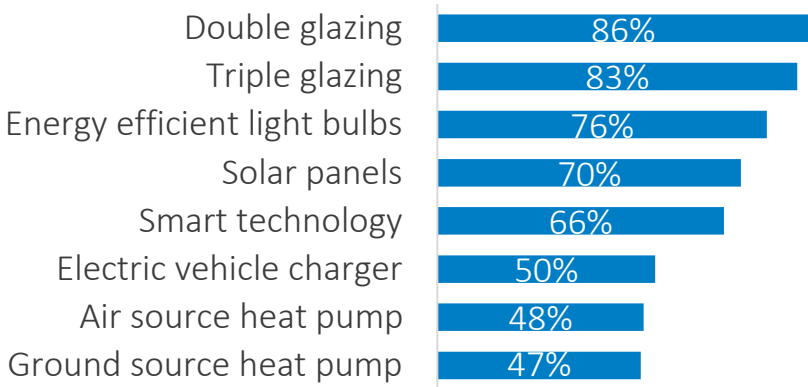
Heat pumps are appealing to around 1 in 2 consumers when already installed, but this drops to one in three if they need to install it themselves, underlining a preference for convenience and reduced hassle.



18% have ever purchased a new build property



LCTs which are most appealing in new builds:

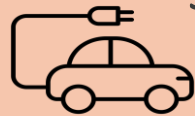


Public support for low carbon home technologies is strong, with **76% agreeing that government subsidies are needed to make them affordable**, highlighting concerns about cost and fairness in the shift to net zero.

There is also broad support for making low carbon technology mandatory in new builds (69%), reflecting growing awareness of the role housing plays in reducing emissions.

However, 62% believe installation should remain the homeowner's choice, showing that while people support wider adoption, they value flexibility, especially for existing homes.

Electric Vehicles (EVs)



34% would consider an EV,
51% would consider a
hybrid



One in three vehicle owners say they’d consider an EV when replacing their current car, signalling growing interest and a shift in driver attitudes. While EVs aren’t yet the top choice, this trend supports the UK’s goal for all new cars to be zero emission by 2035, as awareness and availability continue to improve.

Reasons for considering an EV:



Environmental
benefits (64%)



Cheaper to run
(51%)



Quiet when
driving (37%)

Reasons against considering an EV:



High purchase
cost (62%)



Battery performance
concerns (46%)



Limited mile
range (44%)



People are increasingly drawn to EVs for their **environmental benefits**, **lower running costs** and **quieter driving experience**. Notably, the appeal of the quiet driving experience has grown, now cited by 37% of EV considerers as a key reason for interest, up from 26% in October 2024. This suggests EVs are seen not just as practical, but also as offering an enhanced driving experience.

However, two-thirds of vehicle owners say they wouldn’t consider an EV. The biggest barrier is the **high upfront cost**, cited by over two-thirds of non-considerers. Other concerns include **battery life** and **limited driving** range, raising doubts about whether EVs can meet everyday needs.

Petrol cars remain the most common choice, especially among lower income groups (Socio-Economic Grade D/E), while interest in EVs is strongest among higher income groups (Socio-Economic Grade A/B). This highlights affordability and access as significant barriers to EV adoption. Addressing these through incentives, infrastructure, and clearer information, will be key to making EVs accessible to more drivers.



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To hear more about our
tracker and how we can help
you with your understanding
of low carbon technology,
please contact:

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