THE MCS FOUNDATION
SCOTLAND

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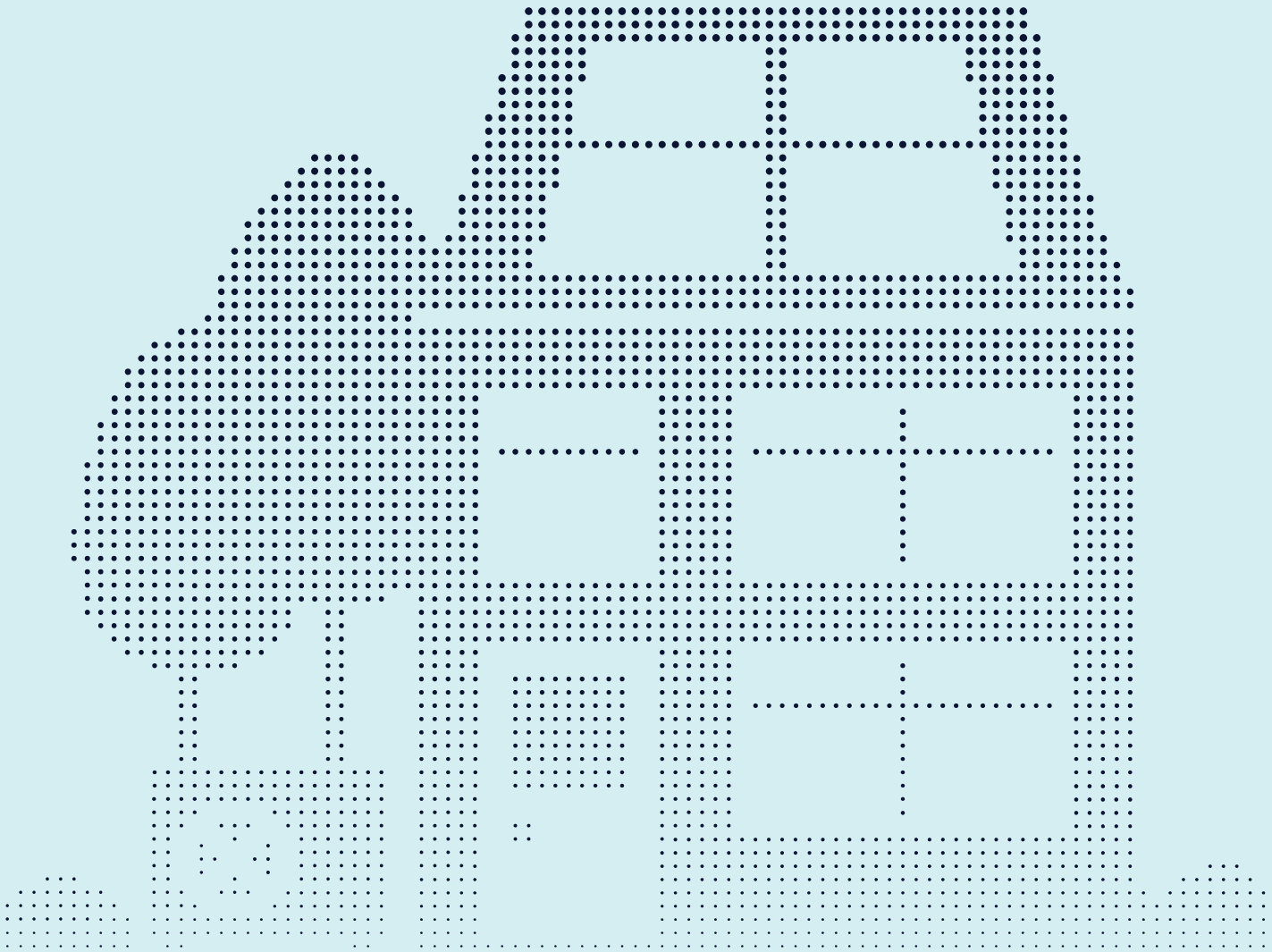
UNLOCKING HEAT DECARBONISATION IN SCOTLAND:
PUBLIC PERSPECTIVES ON 'COMMIT TO CLEAN HEAT' AND 'CUT THE COST'



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THE MCS FOUNDATION SCOTLAND

Unlocking heat decarbonisation in Scotland: public perspectives on 'Commit to Clean Heat' and 'Cut the Cost'

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About The MCS Foundation

Our vision is to make every UK home carbon-free.

The MCS Foundation helps drive positive change to decarbonise homes heat and energy through our work programmes, grants and advocacy.

We support engagement programmes, fund research and facilitate innovative solutions to drive widespread adoption of renewables to help achieve a Net Zero future. In addition, the Foundation oversees the Microgeneration Certification Scheme (MCS) which defines, maintains and improves quality standards for renewable energy at buildings scale.

Designed by: Jimmy Davies, JimmyDavies.com

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Executive Summary

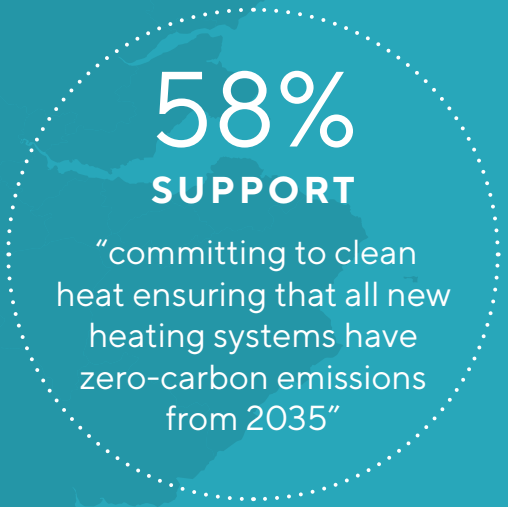
Scotland has committed to reaching net zero emissions by 2045.

The Climate Change Committee (CCC) has identified that electric technologies, including heat pumps, are the clear low-carbon choice across many areas of decarbonisation, particularly in homes. However, with electricity prices remaining high, heat pumps do not necessarily offer lower running costs than fossil fuel-based boilers, and there is currently no phase out date for the installation of polluting heating systems in existing buildings in either the UK or Scotland.

This report presents the results of a survey of 2,000 Scottish residents, which aimed to establish public perceptions of our two live campaigns: **'Commit to Clean Heat'** and **'Cut the Cost: Lower Electricity Prices'**. These areas have been identified as key to unlocking heat pump adoption in both the UK and Scotland, which currently remains off track.

Firstly, there was majority support for "committing to clean heat ensuring that all new heating systems have zero-carbon emissions from 2035" (58%), with relatively few opposed. Tackling climate change was established as the leading reason, as well as boosting energy security. Our results also suggested that language influences public perceptions of this policy, as when phrased as "phasing out fossil fuel boiler installations in Scotland from 2035 and replacing them with zero-emissions heating systems such as heat pumps", a smaller 52% agreed.

Secondly, there was majority support for moving social and environmental levies from electricity bills into general taxation if it reduces energy bills (53%). Almost half of those in the "above median income" category agreed, even when the policy was framed as "if it results in a small increase in my income tax."



Based on the results of this survey, we recommend that the Scottish Government:

1. **Commits to phasing out fossil fuel-based boilers from 2035.**

   This will provide a clear timeframe and give the public, industry and stakeholders time to prepare for the change.

2. **Communicates the policy with the public using clear and positive language.**

   Avoid the use of terms such as "ban", and frame it as a "commitment to clean heat".

3. **Runs advertising campaigns to increase awareness of heat pump grants and available advice services.**

   Many households lack confidence in switching from fossil fuel-based boilers, but access to reliable information and support can encourage uptake. The survey results indicate that despite the Scottish Government providing an advice service and grant support to encourage the transition to clean heat, the Scottish public may not be aware of them.

4. **Actively presses Westminster to move social and environmental levies from electricity bills to general taxation to lower electricity prices.**

   This will not only address the current energy cost crisis but also ensure that heat pumps are cheaper to run than fossil fuel-based boilers.

Introduction

Scotland's climate change legislation has set a target date for net zero emissions of all greenhouse gases by 2045.[1]

Scotland's latest Draft Climate Action Plan: 2026-2040 notes a target for decarbonising heating systems by 2045 as a key policy driver.[2] The Climate Change Committee (CCC) have outlined in their 'Scotland's Carbon Budget' report that electric technologies including heat pumps are the clear low-carbon choice in many areas of decarbonisation.[3] Referring to their 'Balanced Pathway', they state:

> *...by 2035, 40% of existing homes are heated by low-carbon electric systems in our pathway. The majority of these (around a quarter of existing homes) are heated by a heat pump, either as standalone or communal systems, with the rest heated by heat networks or direct electric systems. By 2045, 92% of existing homes have low-carbon heat, reaching all homes by 2050. Annual heat pump installations in existing homes will need to accelerate rapidly, reaching nearly 35,000 by 2030.*

The MCS Foundation currently has two campaigns; **'Commit to Clean Heat'** and **'Cut the Cost: Lower Electricity Prices'**, to help address this target. Not only will the latter directly benefit fuel poor households, especially those on direct electric heating, but these campaign areas have been identified as key to unlocking heat pump deployment in both the UK and Scotland.

METHOD

Here, we present the results of a survey of 2,000 Scottish residents which aimed to establish public perceptions of both campaign areas, as well as general attitudes towards net zero and government priorities in Scotland. The survey was conducted on our behalf by Savanta, the independent market research agency and member of the British Polling Council. The results have been weighted by age, socio-economic group and gender to be representative of Scottish adults. Fieldwork was undertaken in October 2025.

Commit to Clean Heat

The CCC's Seventh Carbon Budget states that "growth in consumer demand and installer capacity, rather than manufacturing capacity, are the primary constraints on deployment."[4]

In other words, until there is clear policy certainty for both the public and installers, Scotland risks missing its heat pump installation targets. To achieve this, the Scottish Government needs to send a clear message to the public, industry and stakeholders to start preparing for the electrification of heat.

The New Build Heat Standard requires new buildings to install climate-friendly systems instead of oil and gas boilers (from January 2025).[5] This is part of the wider Heat in Buildings Strategy, which sets out the actions that the Scottish Government is taking in the building sector to deliver climate change commitments, maximise economic opportunities, and ensure a just transition, including helping address fuel poverty.[6] Although this is a step in the right direction, the CCC has previously recommended a UK-wide 2035 phase out date for installing new fossil-fuel boilers, warning that current policies fall short, and that any delays risk undermining net zero efforts.[7] The recent draft Climate Action Plan states that a new Heat in Buildings Strategy and Delivery Plan will be published before the end of next year, adding to further delays and uncertainty.[8]

It is essential for both the UK and Scottish governments to commit to clean heat as soon as possible to reach net zero targets. Scotland has previously delayed its plan to implement a ban on the installation of fossil fuel boilers, citing unfairness and practicality.[9] It is imperative that the policy is reconsidered to set a clear timeline, giving industry and households confidence to prepare for the adoption of zero-carbon heating solutions like heat pumps. It's important to note that the backstop date of prohibiting the use of polluting heat from 2045 proposed in the previous Heat in Buildings Bill would be insufficient if Scotland is to meet its 2045 net zero target.[10] Fossil-fuel boilers typically last 15-20 years,[11] meaning if a boiler was installed in 2044, it could continue to pollute until at least the 2060s. Instead, the Scottish Government should ban new fossil fuel system installations from 2035 onward.

It has been shown that governments are capable of committing to policies that aim to phase out outdated technologies and incentivise new ones. For example, the UK is phasing out the sale of new petrol and diesel cars, with a complete ban on new sales from 2030.[12]

Last year, over 381,000 electric cars were sold in the UK[13] – more than any country in Europe, and the third highest number of any country in the world. Not only does this prove that phase out dates work, but also implementing a similar strategy with similar timeframes for phasing out fossil fuel-based heating systems would be a logical step in the right direction.

Last year, over

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Cut the Cost: Lower Electricity Prices

Wholesale prices for gas and electricity have reached new record highs in the UK during the energy crisis and have still not returned to their earlier levels.[14]

In 2023

34%

of Scottish households were estimated to be in fuel poverty. 19.4% were living in extreme poverty.[15]

Volatile gas wholesale prices have been an issue in Europe for years; prior to the Russian invasion of Ukraine, Ofgem cited a 50% increase in the wholesale price of gas.[15] This has contributed to the cost of living crisis, with many households struggling to afford energy costs. In 2023, an estimated 34% (around 861,000) of all Scottish households were in fuel poverty, and 19.4% were living in extreme poverty.[16] This highlights the extent of the issue, and the need to take immediate action to reform the current energy system.

Energy costs can be broken down into different costs including wholesale costs, network and operating costs, VAT, and environmental/social obligation costs. A substantial proportion of our electricity bills are made up of social and environmental levies. Under the newest price cap (October 1st – December 31st 2025), levies make up around 18% of the final price of electricity, compared to only 7% on gas.[17] This disproportionate system directly disadvantages houses using electric heating; over 8% of UK households use electricity for heating, and families that do are nearly twice as likely to be in fuel poverty as those using other fuels. In Scotland, this proportion is even bigger, with 11% of households using electricity as their primary heating fuel.[18]

Therefore, households with a clean heating system are being unfairly penalised under the current system. As heat pumps run on electricity, to achieve lower running costs than that of a fossil fuel-based boiler, government must address this issue. This process must be done in a way that protects people on low incomes or those who are in fuel poverty or unable to transition to heat pumps. This is why The MCS Foundation believes the most pragmatic approach is to move social and environmental tariffs, which have been added to electricity, into general taxation.[19] This will ensure that those who are on low incomes or in fuel poverty will particularly benefit.

The UK has the highest ratio of residential electricity prices to gas (otherwise known as the 'spark gap') as well as one of the smallest heat pump markets in Europe.[20] Not only would this policy change directly help households with the current cost of living crisis, but it is well understood that electricity prices are directly linked to heat pump deployment rates.

Lowering electricity prices will help the transition away from gas heating by incentivising the transition to heat pumps, and could be one of the biggest drivers for decarbonisation. There is an urgent need to make sure these reforms go ahead and are both thorough and rapid, so we can see electricity prices placed on par with other European countries.

Key Results

Attitudes towards government priorities and net zero

To understand how respondents prioritised net zero and climate change among the issues being debated ahead of the Scottish elections in May 2026, they were asked to rank their top three issues in order of importance – in terms of what mattered most to them when deciding how to vote and what they want the next Scottish Government to focus on.

Respondents cited reducing the cost of living (28%) and NHS waiting times (20%) as their number one issue for the next election, while housing, climate change, and other issues ranked far lower in public priority (Figure 1). "Encouraging the UK government to reduce energy bills" was in the top three priorities for 29% of respondents, more than that of even making housing more affordable (23%), suggesting that while energy bills may not be as high of a priority as the options stated above, it is evidently still a key concern amongst the Scottish public.

***Figure 1** - "There will be a Scottish Parliamentary election in May 2026. Please rank which three of the following issues will matter most to you when deciding how to vote and what you want the next Scottish Government to focus on" (n = 2,000))*

Most important issue

Reducing the cost of living	28%	Tackling climate change	5%
Reducing NHS waiting times	20%	Improving education and schools	5%
Immigration	15%	Improving public transport	2%
Encouraging the UK government to reduce energy bills	7%	Supporting job creation	2%
Improving economic growth	7%	Other (please specify)	2%
Making housing more affordable	6%	Making progress towards net zero	1%

Figure 2 *- "To what extent do you agree or disagree with the following statements?" (n = 2,000)*

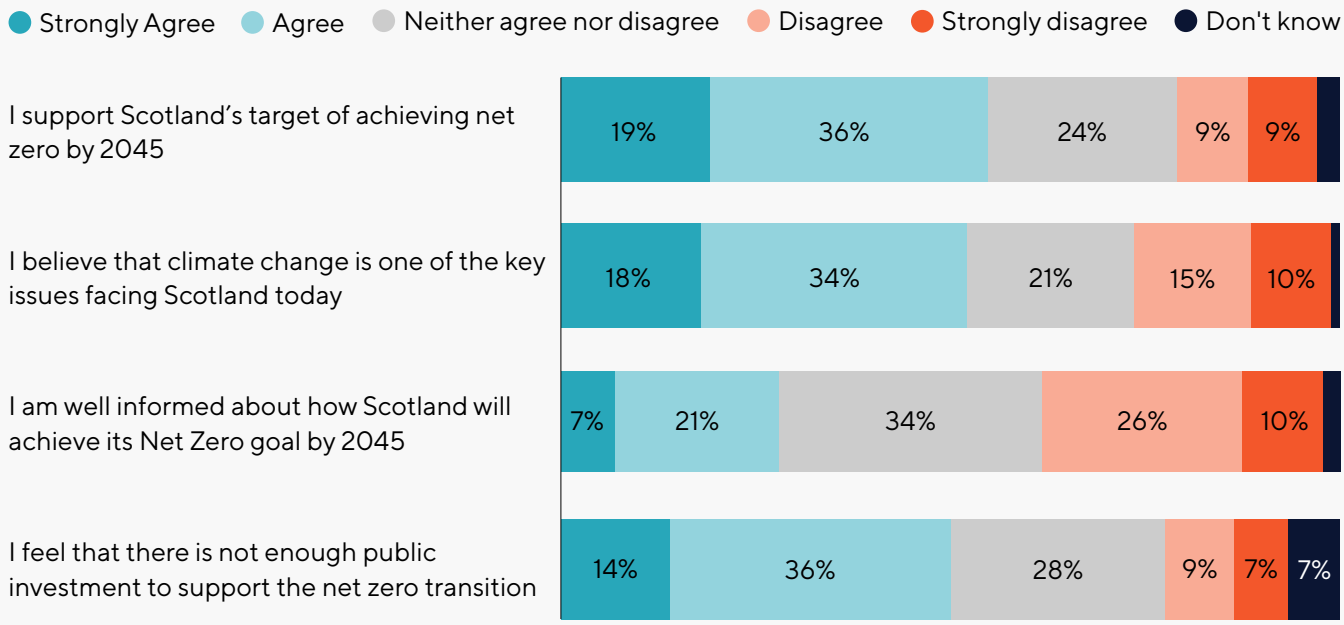
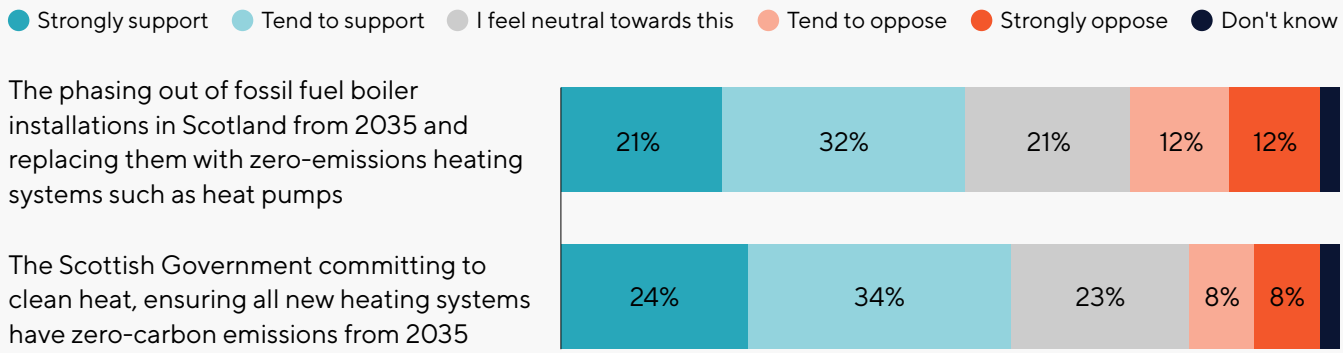


Figure 2 shows how public support for Scotland's 2045 net zero target is strong, with 55% either agreeing or strongly agreeing with it. Furthermore, over half expressed agreement that climate change is one of the key issues facing Scotland today. This suggests that while it may not be a top priority for many in the framing of Figure 1, tackling climate change is still important for most of the Scottish public. However, only a quarter feel well informed about how Scotland will achieve its net zero goal by 2045, and half see a need for greater public investment, highlighting that there is still public uncertainty in this area. It will be crucial for the Scottish Government to commit to effective climate policies and demonstrate to the public that it has a credible plan for making progress toward achieving net zero.

Attitudes towards 'Commit to Clean Heat'

***Figure 3** - "Given the previous information we shared, to what extent do you support or oppose the following proposals?" (n = 2,000)*

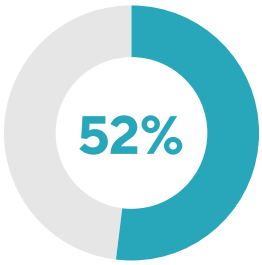


Public backing for phasing out fossil fuel boilers and committing to zero-emissions heating in Scotland from 2035 is strong, with over half of respondents in favour and relatively few opposed (Figure 3).

These results also suggest that language matters when conveying this message – there was an increased level of support for the question phrased as "committing to clean heat ensuring all new heating systems have zero-carbon emissions from 2035" (58%) rather than "phasing out of fossil fuel boiler installations in Scotland from 2035 and replacing them with zero-emissions heating systems such as heat pumps" (52%).

"committing to clean heat, ensuring all new heating systems have zero-carbon emissions from 2035"

"phasing out of fossil fuel boiler installations from 2035 and replacing them with zero-emissions heating systems such as heat pumps"



It is worth nothing that over three times as many respondents supported committing to clean heat than opposed it (17%). Furthermore, when looking at respondents who had a gas boiler as their main heating system (72%), net support was 49% for the "phasing out" phrased question and 56% for the "committing to clean heat" phrased question, implying that even those who currently have a fossil fuel-based heating system are influenced by the language used to frame this policy proposal.

Similarly, amongst the different age groups[i] and urban/rural classification groups, there was increased net support for the "commit to clean heat" phrased question (Tables 1 and 2).

Key: Net support for "commit to clean heat" phrased question

1. "The phasing out of fossil fuel boiler installations in Scotland from 2035 and replacing them with zero-emissions heating systems such as heat pumps"

2. "The Scottish Government committing to clean heat, ensuring all new heating systems have zero-carbon emissions from 2035"

Table 1 *- Net support for (1), "The phasing out of fossil fuel boiler installations in Scotland from 2035 and replacing them with zero-emissions heating systems such as heat pumps" and (2) ,"The Scottish Government committing to clean heat, ensuring all new heating systems have zero-carbon emissions from 2035" amongst age categories.*

Age categories

	18-24	25-34	35-44	45-54	55-64	65+
1.	66%	72%	61%	52%	42%	35%
2.	70%	71%	66%	55%	53%	45%

Table 2 *- Net support for (1), "The phasing out of fossil fuel boiler installations in Scotland from 2035 and replacing them with zero-emissions heating systems such as heat pumps" and (2) ,"The Scottish Government committing to clean heat, ensuring all new heating systems have zero-carbon emissions from 2035" amongst urban/rural classifications.*

Urban/rural classifications

	City centre	Urban	Suburban	Rural
1.	69%	55%	48%	39%
2.	72%	62%	53%	47%

These findings suggest that public opinion on heating policy is sensitive to wording, with more positive reactions to language that focuses on commitment rather than restriction. Using the most effective language will be essential when conveying this campaign, and we would strongly encourage the Scottish government to avoid using any form of "ban" language, with the emphasis instead being on "committing to clean heat".

[i] Except for the 25-34 age category which had a 1% difference

Figure 4 *- [For those who supported phase out, Figure 3] "What are your main reasons that you support phasing out fossil fuel-based boilerinstallations in Scotland from 2035?" (n = 1,164)*

Main reasons that respondents support phasing out fossil fuel boiler installations

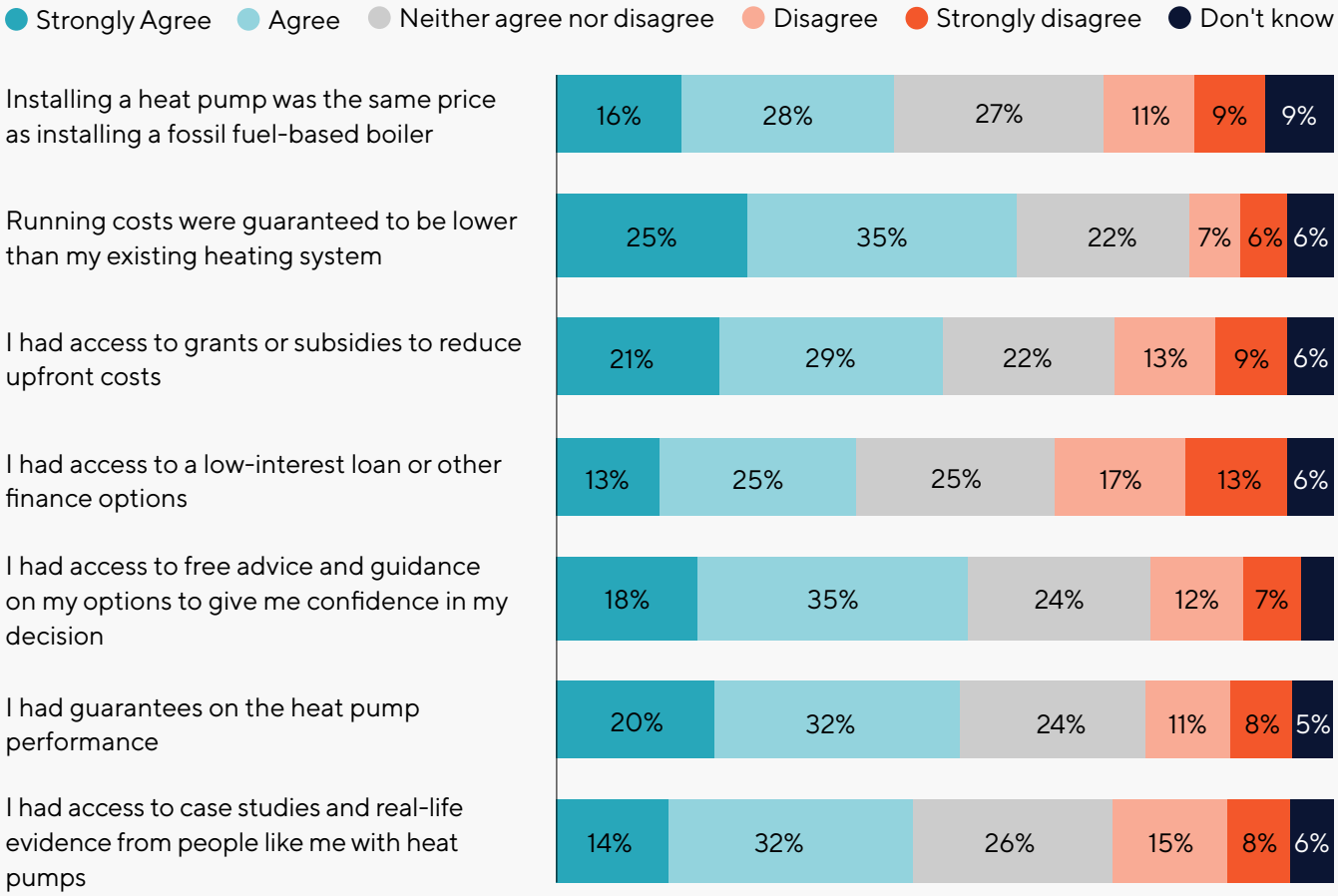
To help tackle climate change	67%	To align with government net-zero commitment	34%
To lower carbon footprint	58%	Heat pumps are more reliable than fossil fuel boilers	20%
To increase energy security i.e. reduce reliance on imported fossil fuels	45%	To follow the trend seen in other European countries (e.g. Norway)	19%
To future-proof against rising fossil fuel prices	37%	Don't know	2%
To reduce indoor air pollution from burning fuel	36%	None of these Other (please specify)	<1%

Figure 5 *- [For those who opposed phase out, Figure 3] "What are your main reasons that you oppose phasing out fossil fuel boiler installations in Scotland from 2035?" (n = 337)*

Main reasons that respondents oppose phasing out fossil fuel boiler installations

Heat pumps are too expensive to buy/ install	71%	Lack of trust in government/industry to deliver the transition fairly	51%
Not all homes are suitable for a heat pump (e.g. layout, space)	67%	Fossil fuel boilers are more reliable than heat pumps	50%
Concern about energy bills rising with electricity use	62%	Uncertainty about long-term maintenance and repairs	45%
Prefer personal choice rather than be required by government policy	52%	Other (please specify)	5%
Heat pumps won't perform well in cold weather	52%	Don't know None of these	1%

Figure 6 *- "To what extent do you agree or disagree with the following statements about choosing a heat pump instead of a fossil-fuel based boiler? I would choose to have a heat pump installed if..." (n = 2,000)*



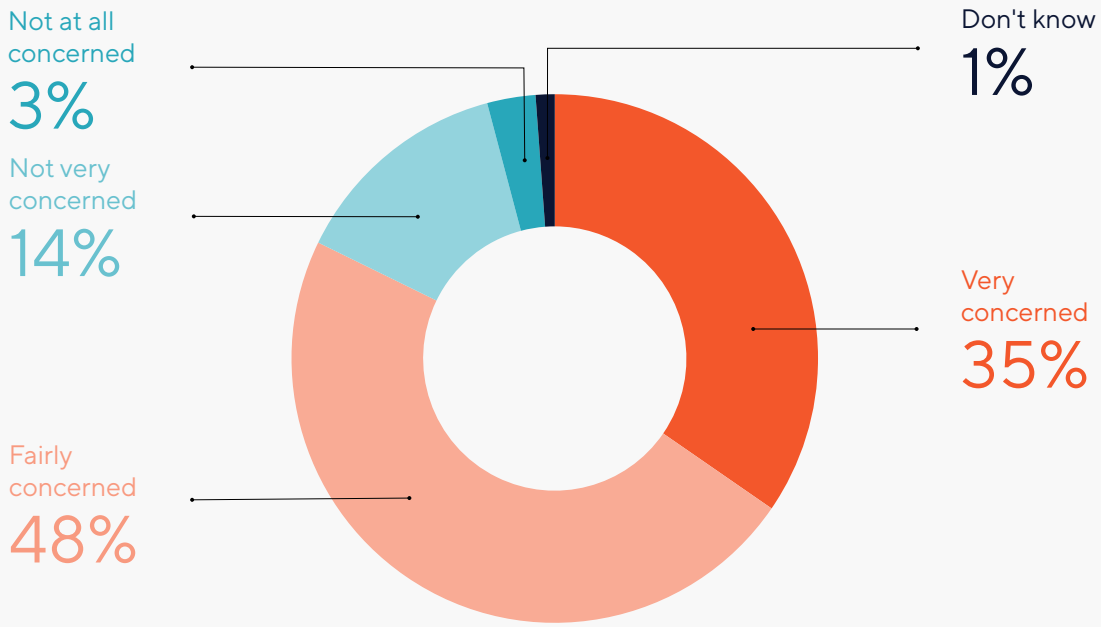
For the respondents who support phasing out fossil fuel boiler installations in Scotland from 2035 (n=1,164), tackling climate change was the leading reason, followed by lowering their carbon footprint and boosting energy security (Figure 4). For those who answered that they oppose ending fossil fuel boiler installations (n= 337), the key reasons were high heat pump costs (71%), issues related to property suitability (67%), and concerns over rising energy bills (62%) (Figure 5). Similarly, in terms of what would encourage the public to install a heat pump, guaranteed lower running costs was the most persuasive factor, with 60% either agreeing or strongly agreeing that this would encourage them (Figure 6).

Likewise, half of respondents either agreed or strongly agreed that they would choose to have a heat pump if they "had access to grants or subsides to reduce upfront costs". These results suggest that some members of the public may be unaware of existing grant schemes in Scotland. This implies that, to increase heat pump deployment at the scale required, it will be essential for the Scottish Government to not only maintain sufficient funding but also to improve communication and promotion of the available heat pump grants .[21] This includes conveying the rural uplift element of the grant, as 42% of respondents belonging to the "rural" classification either agreed or strongly agreed to this message.

Furthermore, 52% either agreed or strongly agreed that if they "had access to free advice and guidance" on their options, it would encourage them to install a heat pump, indicating how there is a current lack of public awareness and confidence about the process. Therefore, the Scottish Government must ensure that the heat pump advice service improves in effectiveness and reaches more of the public so they feel they can make an informed decision.

Attitudes towards 'Cut the Cost: Lower Electricity Prices'

Figure 7 *- "To what extent are you concerned about the cost of your household energy bills over the next 12 months?" n = 2,000*



Energy cost anxiety is widespread, with 35% of respondents very concerned and 48% fairly concerned about their household bills over the coming year (Figure 7). This included those on above median incomes, with net agreement at 96%. Only a small minority answered that they were "not very concerned" (14%) or "not at all concerned" (3%).

The UK Government has committed to reducing energy bills by £300 by 2030.[22] Public support for this target is high, with more than three quarters backing the goal (Figure 8). However, confidence in the UK government's ability to deliver is poor, with over half of the survey respondents either disagreeing or strongly disagreeing that the goal will be achieved by 2030.

Figure 8 *- "The UK Government has committed to reducing energy bills by £300 by 2030. To what extent do you agree or disagree with the following statements?" (n = 2,000)*

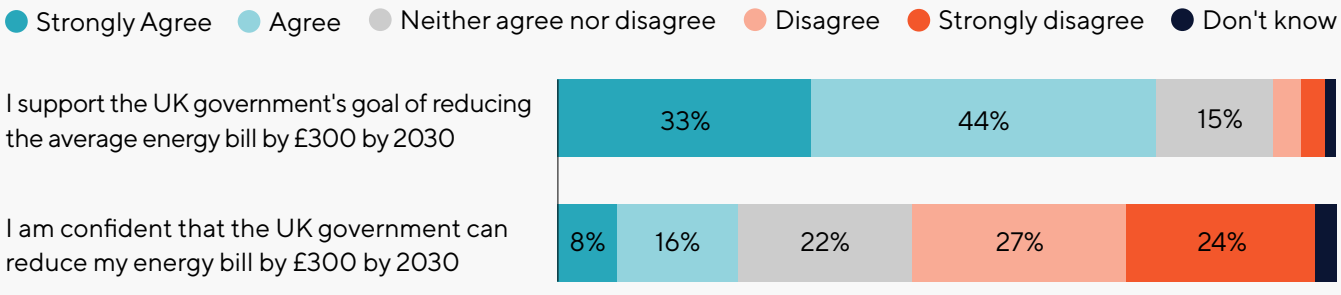
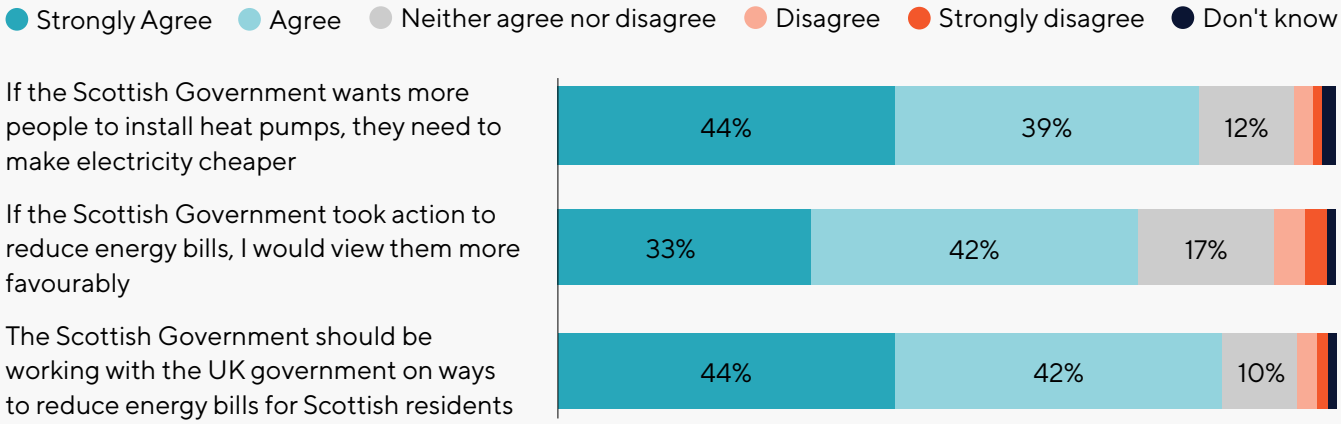
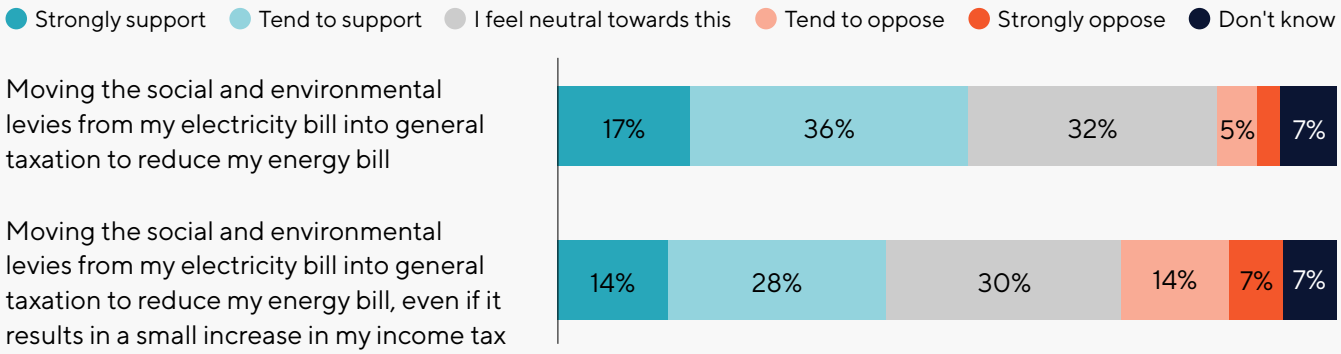


Figure 9 *- "To what extent do you agree or disagree with the following statements?" (n = 2,000)*



On the other hand, three quarters of respondents either agreed or strongly agreed that they would view the Scottish Government more favourably if they took action to reduce energy bills (Figure 9). This presents a significant opportunity for the Scottish Government. If it were to take a leadership role in pressing Westminster to address the issue in this pragmatic way, it could not only lift thousands out of fuel poverty, lower the cost of living anxiety, and encourage the electrification of heat, but also improve public perception of its leadership. Scottish residents show strong agreement that electricity costs should be reduced to encourage heat pump adoption and overwhelmingly supported both action to reduce energy bills and collaboration between the Scottish and UK governments to achieve this (Figure 9).

Figure 10 *- "Given the previous information we shared, to what extent do you support or oppose the following proposals?" (n = 2,000)*



In terms of The MCS Foundation's specific policy ask, more than half of respondents supported moving social and environmental levies from electricity bills and into general taxation if it reduces energy bills (Figure 10). Respondents already using electric heating were more likely to support it than those on gas, implying that this policy is most favoured by those who rely on electricity for their heating. Only 3% of respondents strongly opposed this proposal. The Scottish Government should see this as incredibly promising and confidently call for the policy's implementation.

Although support falls slightly when framed in the case where it would result in a small increase in the respondent's income tax, almost three quarters of respondents either agreed, strongly agreed, or felt neutral towards it. We can infer that this could be seen by the public as a fair way of redistributing social and environmental levies. This was even the case for those on the highest incomes who would therefore be eligible to pay slightly more in tax for this purpose – 48% of those in the "above median income" category had a net agreement to the statement, compared to 41% of those in the "financially vulnerable" category and 38% of those in the "below median income" category.

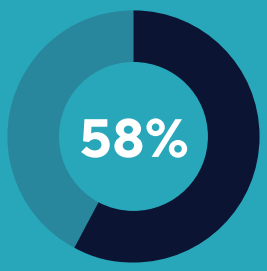
Conclusions and recommendations

Based on the survey findings, there is overwhelming public support in Scotland for our two current campaigns, 'Commit to Clean Heat' and 'Cut the Cost: Lower Electricity Prices'.

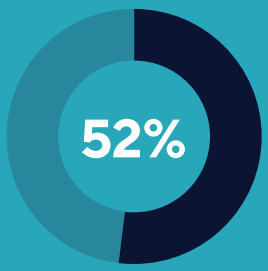
Firstly, there was strong agreement with the proposal to phase out fossil fuel-based boilers, with the majority of respondents in favour.

However, this also revealed that choice of language has an impact on support when conveying this message – when phrased as "committing to clean heat, ensuring all new heating systems have zero-carbon emissions from 2035", net support was increased to 58%, compared to 52% when phrased as "the phasing out of fossil fuel boiler installations from 2035 and replacing them with zero-emissions heating systems such as heat pumps".

"committing to clean heat, ensuring all new heating systems have zero-carbon emissions from 2035"



"the phasing out of fossil fuel boiler installations from 2035 and replacing them with zero-emissions heating systems such as heat pumps"



Secondly, with widespread concern about the cost of household energy bills over the next year, more than half of respondents supported moving social and environmental levies from electricity bills to general taxation to address this issue. Even when framed in the context of it increasing income tax, this proposal still received majority support.

There is a direct link between the two campaigns, and our broader advocacy goals that are the basis of them– the survey showed that the most persuasive factor for choosing a heat pump over fossil fuel-based boilers was the guarantee that running costs would be lower. To achieve this, electricity prices must be reduced, so that heat pumps are cheaper to run than a fossil fuel-based boiler, which is not currently the case.

Respondents also answered that they could be encouraged to make the switch if they had access to :

1. Grants or subsides to reduce upfront costs
2. Free advice and guidance

Based on the results of this survey, we recommend that the Scottish Government:

1. **Commits to phasing out fossil fuel-based boilers from 2035.**

   This will provide a clear timeframe and give the public, industry and stakeholders time to prepare for the change.

2. **Communicates the policy with the public using clear and positive language.**

   Avoid the use of terms such as "ban", and frame it as a "commitment to clean heat".

3. **Runs advertising campaigns to increase awareness of heat pump grants and available advice services.**

   Many households lack confidence in switching from fossil fuel-based boilers, but access to reliable information and support can encourage uptake. The survey results indicate that despite the Scottish Government providing an advice service and grant support to encourage the transition to clean heat, the Scottish public may not be aware of them.

4. **Actively presses Westminster to move social and environmental levies from electricity bills to general taxation to lower electricity prices.**

   This will not only address the current energy cost crisis but also ensure that heat pumps are cheaper to run than fossil fuel-based boilers.

For Scotland to meet its 2045 net zero target, urgent action is needed to decarbonise its housing stock, particularly by increasing the transition to clean heating solutions like heat pumps. To do this, we urge the Scottish Government to act without further delay on our two campaign asks, which, as this survey has shown, have strong public support.

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