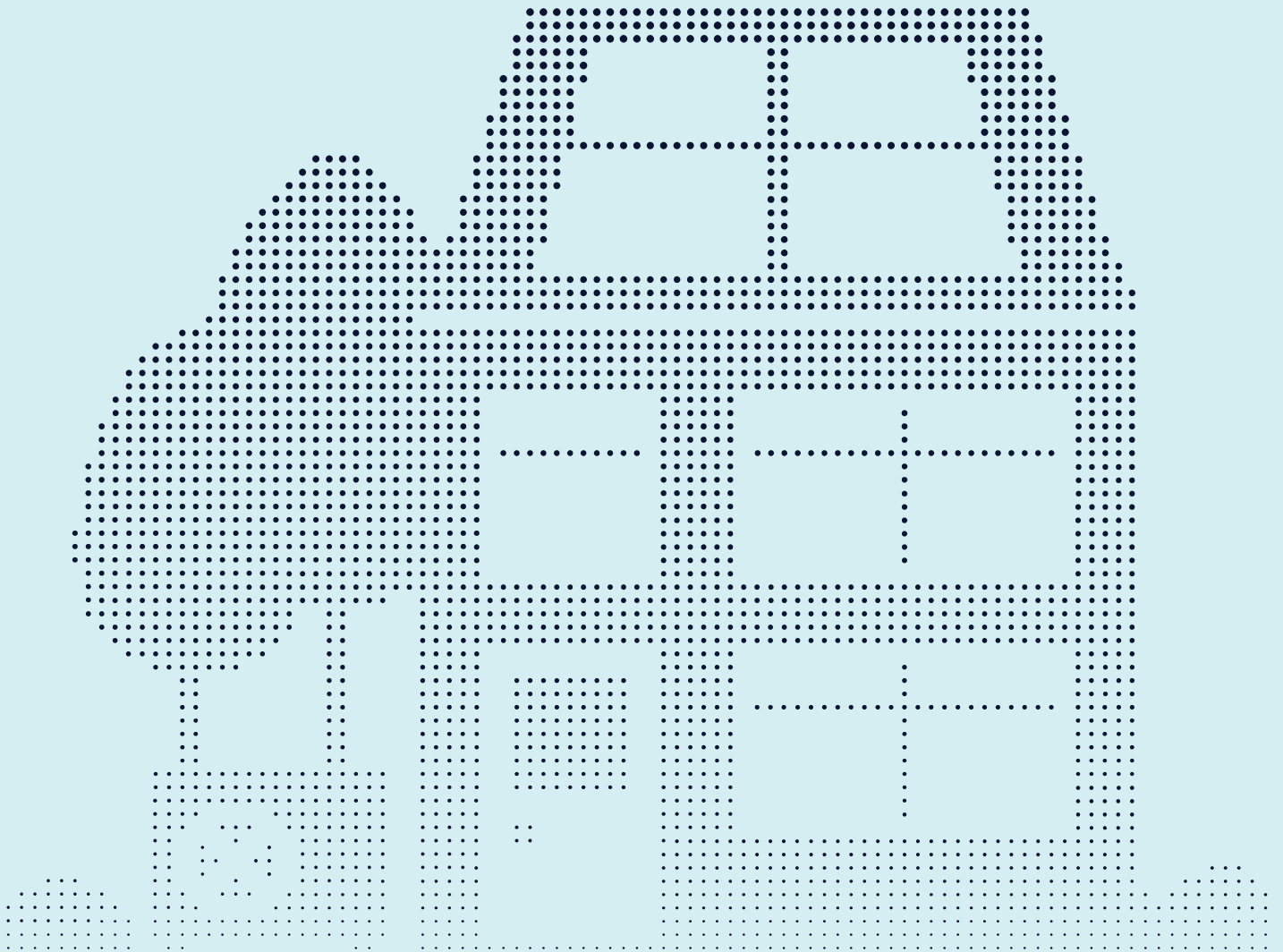


UNLOCKING HEAT  
DECARBONISATION IN  
ENGLAND AND WALES:  
PUBLIC PERSPECTIVES ON  
'COMMIT TO CLEAN HEAT'  
AND 'CUT THE COST'





# Unlocking heat decarbonisation in England and Wales: 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 programmes, grants, and advocacy work.

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](http://JimmyDavies.com)

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# Executive Summary

The UK has committed to reaching net zero emissions by 2050. 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 the UK.

This report presents the results of a survey of over 3,000 residents in England (n=2,000) and Wales (n=1,021), which aimed to establish public perceptions of our two live campaigns: **'Commit to Clean Heat'** and **'Cut the Cost: Lower Electricity Prices'**. The findings presented here combine the results from England and Wales. The survey replicates a previous study by The MCS Foundation with Scottish residents which was published earlier in 2026, enabling comparison across nations.

There was majority support for the UK Government "committing to clean heat, ensuring 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 showed that language influences public perceptions of the policy: while 58% supported "committing to clean heat", a smaller 50% agreed with "phasing out fossil fuel boiler installations in the UK from 2035 and replacing them with zero-emissions heating systems such as heat pumps".

There was broad support for moving social and environmental levies from electricity bills into general taxation if it reduces energy bills (50%), slightly lower than in our Scotland survey (53%). About a third of respondents felt neutral towards this proposal, and a quarter of respondents felt neutral toward the 'commit to clean heat' policy. This highlights an opportunity to increase overall support by clearly communicating the benefits of these policies.

**58%**  
**SUPPORT**

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



**Based on the results of this survey, we recommend the UK Government implement the following:**

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**1. Commit to clean heat, ensuring all new heating systems have zero carbon emissions from 2035.**

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

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**2. Communicate the policy to the public using clear and positive language.**

the use of terms such as “ban” and “phase out”, and frame it as a “commitment to clean heat”.

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**3. Move all social and environmental levies from electricity bills to general taxation to cut the cost of electricity.**

This will not only help tackle fuel poverty, but also ensure that heat pumps are cheaper to run than fossil fuel-based boilers.

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**We also recommend that the Welsh Government:**

**4. Actively press the UK Government to move social and environmental levies from electricity bills to general taxation to reduce electricity prices and support the transition to low-carbon heating in Wales.**

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# Introduction

## The UK's climate change legislation has set a legally binding target date for net zero greenhouse gas (GHG) emissions by 2050.<sup>1</sup>

Residential buildings account for around 14% of the UK's GHG emissions, largely from the use of natural gas and other fuels for heating and cooking.<sup>2</sup> The Climate Change Committee (CCC) have outlined in their 'Seventh Carbon Budget' report that electric technologies including electric vehicles (EVs) and heat pumps are the clear low-carbon choice in many areas of decarbonisation.<sup>3</sup> They state:



*"by 2040, our Balanced Pathway sees around half of homes in the UK heated using a heat pump, compared to around 1% in 2023. This requires the annual rate of heat pump installations in existing residential properties to rise from 60,000 in 2023 to nearly 450,000 by 2030 and around 1.5 million by 2035, a rate of increase in line with that seen in other European countries such as Ireland and the Netherlands."* (pg.13)



The UK Government's Warm Homes Plan<sup>4</sup> (January 2026) outlines how government is recommitting to the electrification of heat, with the aim of delivering over 450,000 heat pump installations per year by 2030 – up from around 60,000 MCS certified installations in 2025.<sup>5</sup> The MCS Foundation currently has two live campaigns; 'Commit to Clean Heat' and 'Cut the Cost: Lower Electricity Prices', to encourage active heat pump adoption in existing residential homes. Not only will the latter directly benefit fuel poor households, especially those on direct electric heating, but both campaign areas have been identified as key to unlocking heat pump deployment in the UK.

### METHOD

This report presents the results of a survey of a representative sample of over 3,000 residents in England (n=2,000) and Wales (n=1,021). The survey replicates a previous study by The MCS Foundation with Scottish residents which was published earlier in 2026,<sup>6</sup> enabling comparison across nations. It explores public perceptions of both campaign areas, as well as general attitudes towards net zero and government priorities. While we surveyed representative samples from across England and Wales, analysing the results as separate nations showed no statistically significant differences, and we have therefore combined the results into a single report.

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 English and Welsh adults. Fieldwork was undertaken in February 2026.

## → 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 heat pump deployment."<sup>7</sup>**

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



The Future Homes Standard (FHS), expected to be implemented in 2027,<sup>8</sup> will require new buildings to install low carbon heating instead of oil and gas boilers in England.<sup>9</sup> Similarly, in Wales, the Building Regulations Part L defines energy efficiency rules, and for most new homes in the nation, this means that heat pumps are strongly favoured and gas boilers are being phased out.<sup>10</sup> 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.<sup>11</sup>

This was considered by the 2019-2022 Conservative government, where the Heat and Buildings Strategy outlined their plan to "phase out the installation of natural gas boilers beyond 2035" in line with the natural replacement cycle.<sup>12</sup> This was part of their wider Net Zero strategy, directly linked to achieving net zero emissions by 2050. However, the following Conservative government softened this proposal,<sup>13</sup> and in early 2025, the Labour government scrapped the policy completely, despite the clear evidence and advice from the CCC.<sup>14</sup>

It is essential for the UK Government to commit to clean heat as soon as possible to reach net zero targets and to set a clear timeline, giving industry and households confidence to prepare for the adoption of zero-carbon heating solutions like heat pumps.

It has been shown that governments can commit to policies that aim to phase out outdated technologies and incentivising 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.<sup>15</sup> In 2025, over 473,000 electric cars were sold in the UK, which marks a 23.9% increase over 2024.<sup>16</sup> 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.

"the Government needs to send a clear message to the public, industry and stakeholders to start preparing for the electrification of heat."

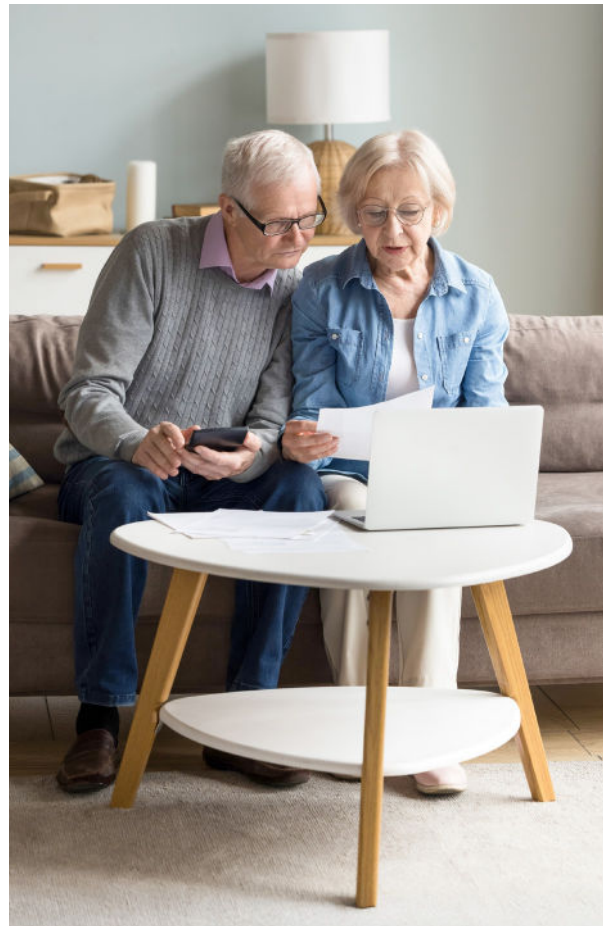
## → Cut the Cost: Lower Electricity Prices

### **Wholesale prices for gas and electricity reached new record highs in the UK during the energy crisis and have still not returned to their earlier levels.<sup>17</sup>**

This has contributed to the cost of living crisis, with many households struggling to afford energy costs. In 2024, there were an estimated 11% of households (2.73 million) in fuel poverty in England, according to statistics published by the Department for Energy Security and Net Zero (DESNZ).<sup>18</sup> However, using National Energy Action's (NEA) definition of fuel poverty (where a household spends 10% or more of its income on energy<sup>19</sup>), this number rises to 9 million.<sup>i</sup> In Wales around 340,000 households (25%) were classified as being in fuel poverty in 2024.<sup>20</sup> 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 policy costs (social and environmental levies). In the 2025 Autumn Budget, the Government announced that from April 2026, they would temporarily fund 75% of the Renewables Obligation (RO) scheme for domestic consumers until 2029, and that the Energy Company Obligation (ECO) was being scrapped entirely, removing this policy cost off bills. While this is estimated to reduce consumer bills by £150,<sup>21</sup> the part funding of the RO is temporary, with the Office for Budget Responsibility (OBR) predicting levies will rise by a third by 2031.<sup>22</sup>

The current 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.<sup>23</sup> It also means that households with a clean heating system are being unfairly penalised. 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.<sup>24</sup> 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, those who are in fuel poverty, or those unable to transition to heat pumps.



The MCS Foundation believes that all social and environmental levies, which have been added to electricity bills, should be moved into general taxation.<sup>25</sup> This will ensure that those who are on low incomes or in fuel poverty will particularly benefit. The CCC also note that heat pumps "should lead to lower household energy bills, provided policy costs are removed from electricity bills."<sup>26</sup>

ii. Note this is after housing costs.

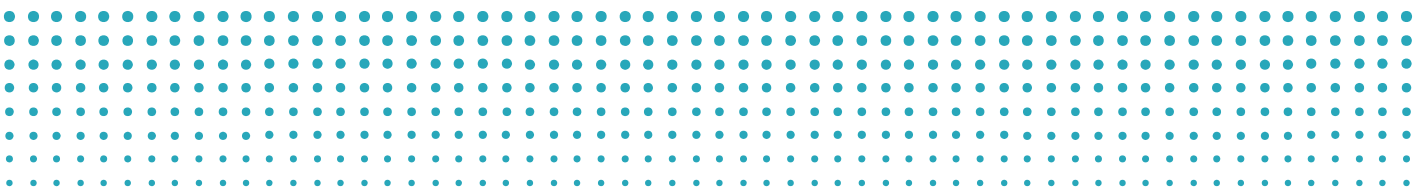
The MCS Foundation's report, 'Rebalancing electricity levies in the UK: impacts on electricity bills, fuel poverty, and the clean heat transition' (2026), examined the impact of electricity levies in 2025 on low-income households, those using direct electric heating, and households switching from a gas boiler to a heat pump.<sup>27</sup> It shows that levy funding has been regressive and has disproportionately impacted low-income households and those relying on electricity for heating; for example, some low-income households were found to be paying more in combined gas and electricity levies than they spent on bread, rice and cereals.

The report also modelled the effect of the Autumn Budget 2025 measures had they been in place in 2025. These interventions reduce annual bills (by £115–£343 across the archetypes and heat-pump cases analysed) and improve heat pump running-cost economics: under the post-Budget framework, a heat pump operating at a Seasonal Coefficient of Performance (SCOP) of 3 would save around £80–£95 per year compared with a gas boiler.

By contrast, full levy reform delivers larger savings for the groups analysed (£170–£530 per year, based on 2025 prices). For heat pump households, full levy reform would reduce running costs further, delivering an additional £120–£185 per year compared with the post-Budget framework, and increasing the heat pump's annual saving relative to gas to around £147–£165 at SCOP 3.



Lowering electricity costs will directly help households with the current cost of living crisis. It is also widely recognised that electricity prices are directly linked to heat pump deployment rates; reducing electricity costs 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 full levy reform goes ahead, 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 current issues, they were asked to rank their top three issues in order of importance in terms of what they want the UK Government to focus on. 28% of respondents ranked “reducing the cost of living” as their top priority, while 68% included it among their top three issues (Figure 1). “Reducing energy bills” was in the top three issues for 43% of respondents, while “tackling climate change” (11%) and “making progress towards net zero” (4%) ranked far lower in public priority.

**Figure 1** - “Thinking about the year ahead, please rank which three of the following issues you want the UK Government to focus on?” (n = 2,959). Figure shows % of respondents who ranked each issue in their top three.

### Top three priorities for the UK Government

Reducing the cost of living

68%

Improving education and schools

11%

Reducing NHS waiting times

51%

Tackling climate change

11%

Immigration

46%

Supporting job creation

9%

Reducing energy bills

43%

Improving public transport

8%

Improving economic growth

25%

Making progress towards net zero

4%

Making housing more affordable

24%

Other (please specify)

2%

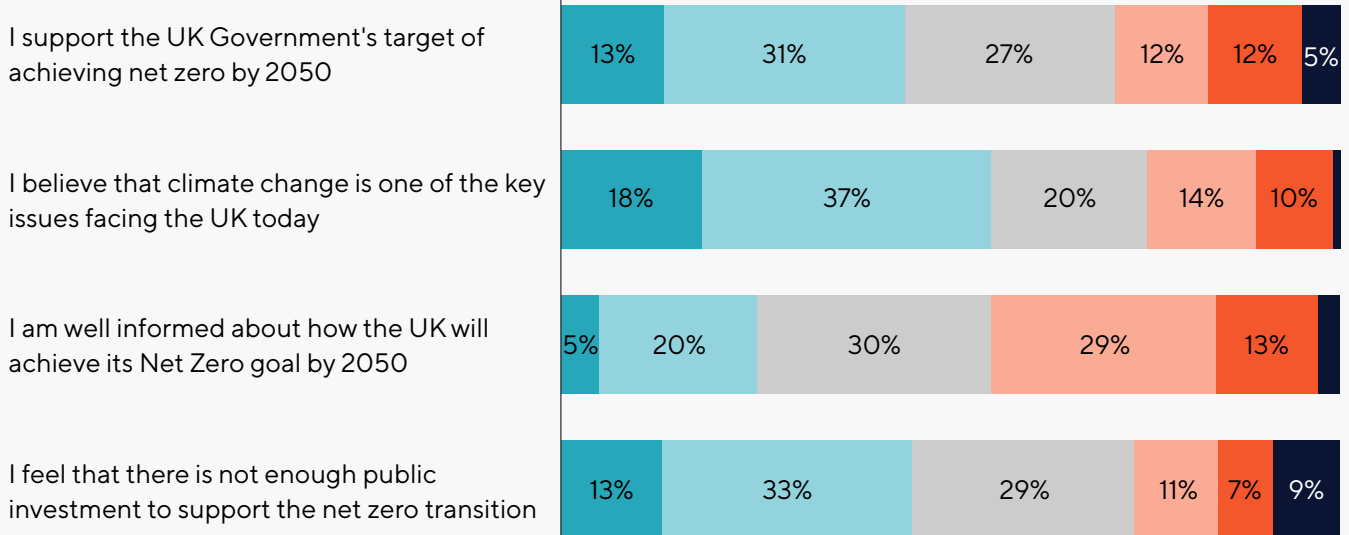
Despite this, Figure 2 shows how public recognition for climate change as an issue was strong; 55% either strongly agreed or agreed that “climate change is one of the key issues facing the UK today”. The strongest net support was from 18–24-year-olds (63%). Furthermore, there was broad support for the UK Government’s 2050 net zero target, with 44% agreeing or strongly agreeing with it, compared to a 25% disagreeing or strongly disagreeing with it. 39% of 25–34-year-olds agreed with the Government’s net zero target, compared to 24% of 65+ year olds. This suggests that while it may not be a top priority for many in the framing of Q1, tackling climate change is still important for many of the English and Welsh public – especially among younger people.



Only a quarter agreed that they felt well informed about how the UK will achieve its net zero goal, with 41% either disagreeing or strongly disagreeing, and 46% agreed or strongly agreed that there is not enough public investment to support the net zero transition. This highlights that there is still significant public uncertainty in this area – consistent with the results from our previous Scottish survey. To address this, it is essential for the UK Government to commit to effective climate policies and communicate to the public that it has a credible plan for making progress toward achieving net zero.

**Figure 2** - "To what extent do you agree or disagree with the following statements?" (n = 3,021)

● Strongly Agree ● Agree ● Neither agree nor disagree ● Disagree ● Strongly disagree ● Don't know



## → 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 = 3,021)

● Strongly support ● Tend to support ● I feel neutral towards this ● Tend to oppose ● Strongly oppose ● Don't know

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

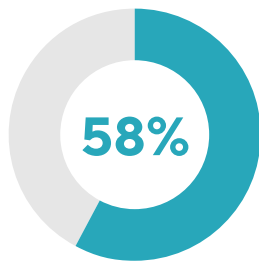


The UK Government committing to clean heat, ensuring all new heating systems have zero-carbon emissions from 2035

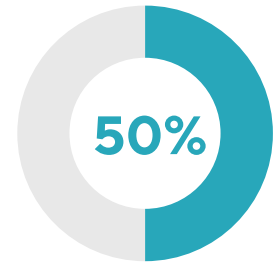


Public backing for phasing out fossil fuel boilers and committing to zero-emissions heating in the UK from 2035 was strong, with half of respondents in favour and relatively few opposed (Figure 3). As with our Scotland survey, these results once again show that language matters when conveying this message – 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 the UK from 2035 and replacing them with zero-emissions heating systems such as heat pumps” (50%).

“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”



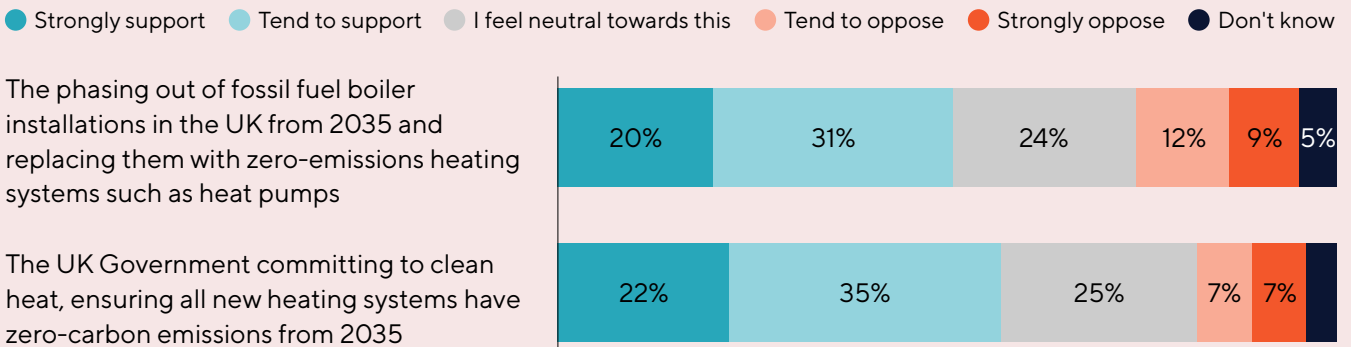
Furthermore, when looking at respondents who had a gas boiler as their main heating system (70%), net support was 47% for the “phasing out” phrased question and 56% for the “committing to clean heat” phrased question, implying that those who currently have a fossil fuel-based heating system are influenced by the language used to frame this policy proposal.

## SUPPORT FOR COMMITTING TO CLEAN HEAT IN WALES

The 2024 Heat Strategy for Wales recognises that the use of fossil fuel heating systems must decline if Wales is to meet its climate change targets.<sup>28</sup> They state: “We will develop options within our devolved powers and work with UK Government to accelerate phasing out fossil fuel boilers in existing dwellings at the point of replacement, that is just and sustainable solution to decarbonisation.”

In this survey, Wales had majority support for both the “phasing out of fossil fuel boiler installations” (51%) and “committing to clean heat” (57%) proposals (Figure 4), with around a quarter of respondents feeling neutral towards the policies, and less than 10% strongly opposing the policies.<sup>ii</sup> The Welsh Government should see this as promising insight into a generally receptive public landscape for clean-heat transition policies.

**Figure 4** - Given the previous information we shared, to what extent do you support or oppose the following proposals? (n = 1,021). Unweighted results for Welsh respondents.



In line with results from the Scotland survey,<sup>29</sup> across different age groups, urban/rural classifications, and income groups, there was increased net support for the “commit to clean heat” phrased question compared to the “phasing out of fossil fuel boiler installations” phrased question in England and Wales (Tables 1, 2 and 3). Young people showed the strongest support, with 72% of respondents in the 25-34 age category either supporting (41%) or strongly supporting (31%) a “commitment to clean heat” (Table 1).

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 UK Government to avoid using any form of any form of “ban” or “phase out” language, with the emphasis instead being on “committing to clean heat”.

ii. Unweighted values.

## Net support for “commit to clean heat”

1.

“The phasing out of fossil fuel boiler installations in UK from 2035 and replacing them with zero-emissions heating systems such as heat pumps”

2.

“The UK Government committing to clean heat, ensuring all new heating systems have zero-carbon emissions from 2035”

**Table 1** - Net support for (1) and (2) amongst age categories in England and Wales

### Age categories

	18-24	25-34	35-44	45-54	55-64	65+
1.	61%	65%	57%	45%	48%	34%
2.	65%	72%	64%	56%	52%	46%

**Table 2** - Net support for (1) and (2) amongst urban/rural classifications in England and Wales

### Urban/rural classifications

	City centre	Urban	Suburban	Rural
1.	62%	54%	45%	42%
2.	65%	61%	54%	55%

**Table 3** - Net support for (1) and (2) amongst income groups in England and Wales

### Income groups

	Financially vulnerable	Below median income	Above median income	Prefer not to say
1.	49%	50%	55%	41%
2.	56%	59%	62%	51%



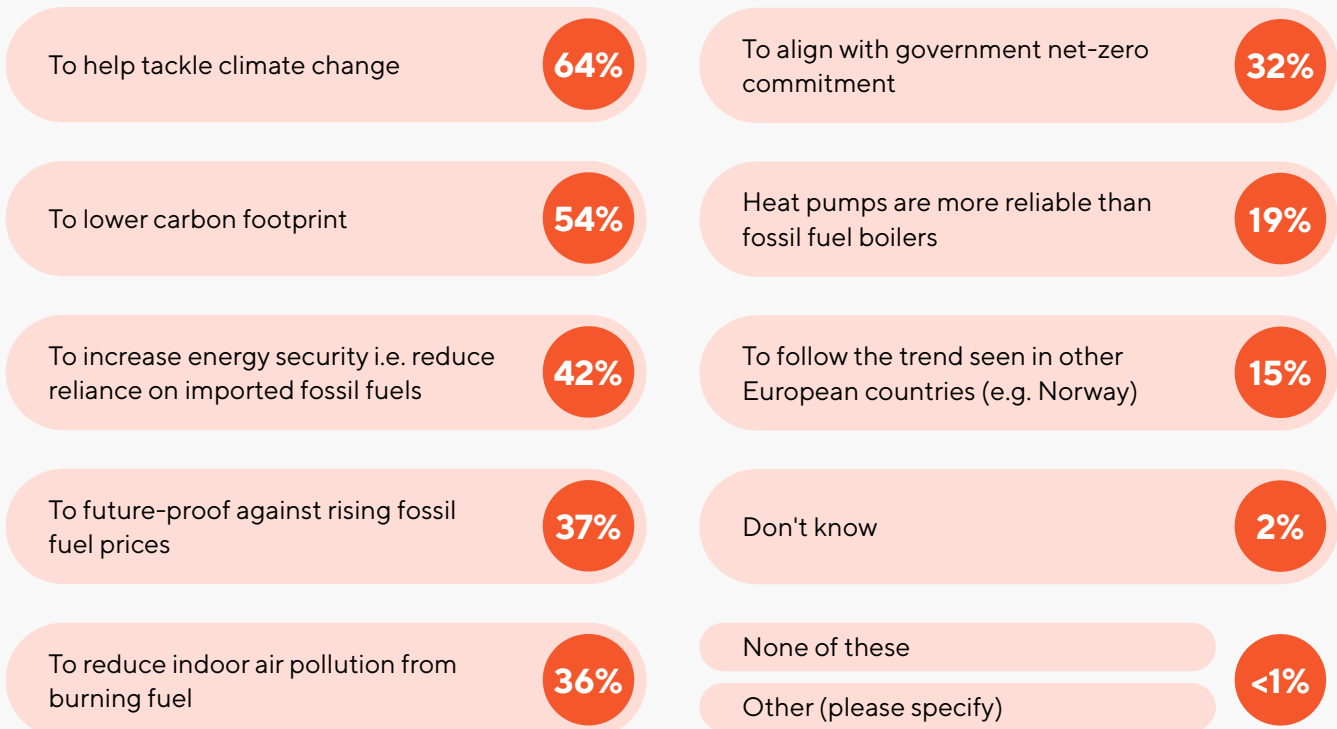
For the respondents who supported phasing out fossil fuel boiler installations in the UK from 2035 (n=1,741), tackling climate change was the leading reason (64%), followed by lowering their carbon footprint (54%) and boosting energy security (42%) (Figure 5). For those who answered that they oppose ending fossil fuel boiler installations (n= 463), the key reasons stated were high heat pump costs (67%), issues related to property suitability (66%), and concerns over rising energy bills (57%) (Figure 6). The Electrification of Heat project has shown that heat pumps can be successfully installed in a wide range of existing homes, finding no particular home archetype in Britain to be “unsuitable.”<sup>30</sup> Clear communication from the Government is essential to reassure the public and boost confidence in adopting this technology.

In terms of what could encourage the public to install a heat pump, guaranteed lower running costs than an existing heating system was the most persuasive factor, with 54% either agreeing (34%) or strongly agreeing (20%) that this would encourage them (Figure 7). This contrast shows that the same concern - energy costs - can either discourage or motivate adoption, depending on whether running costs are perceived as high or guaranteed to be low. To achieve this, electricity prices must be reduced so that heat pumps are cheaper to run than a fossil-fuel based boiler - highlighting the importance of our 'Cut the Cost' campaign that aims to reduce the cost of electricity by permanently removing social and environmental levies off electricity bills.

Almost half (49%) of respondents 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 a lack of public awareness and confidence about the process. This was recognised in the Warm Homes Plan, which announced the launch of a new Warm Homes Agency to “provide impartial advice and clear information on home upgrades to consumers in partnership with the private sector and third-party advice sector.”<sup>31</sup> Therefore, the UK 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.

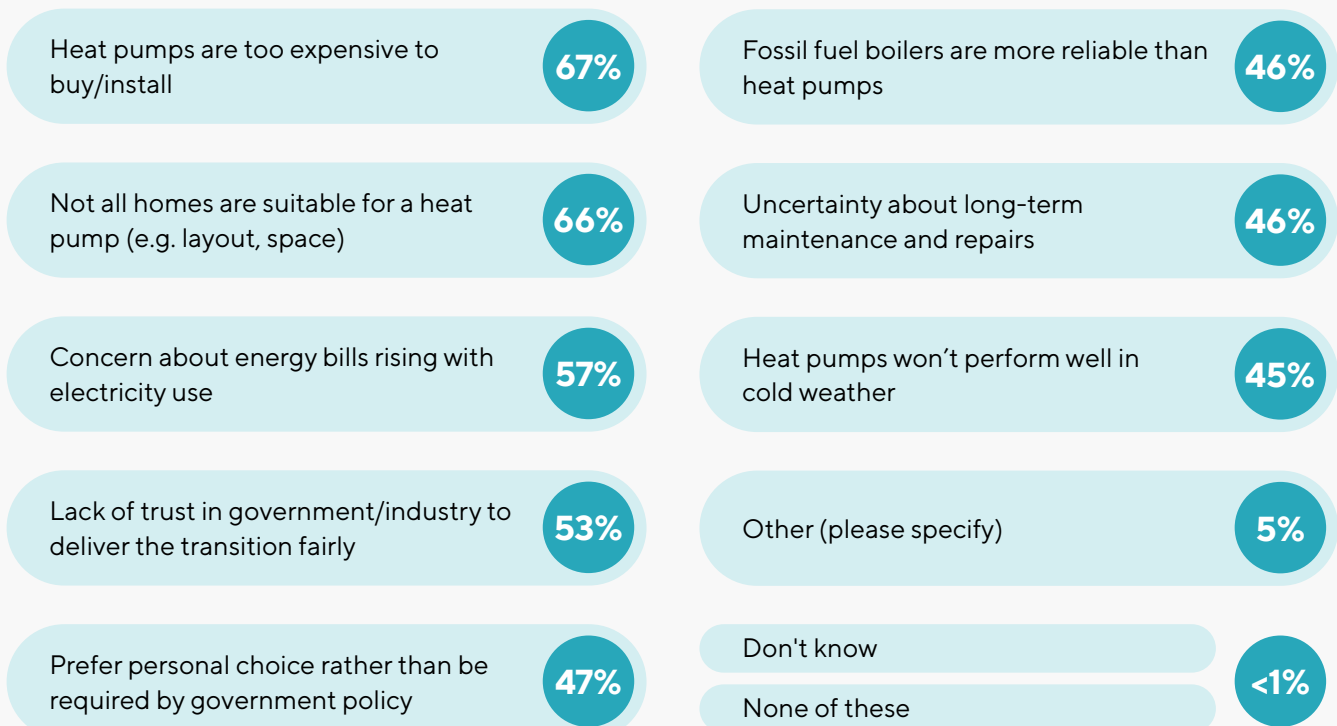
**Figure 5** - [For those who supported phase out, Fig 3] "What are your main reasons that you support phasing out fossil fuel boiler installations from 2035?" (n = 1,741)

### Main reasons that respondents support phasing out fossil fuel boiler installations



**Figure 6** - [For those who opposed phase out, Fig 3] "What are your main reasons that you oppose phasing out fossil fuel boiler installations from 2035?" (n = 463)

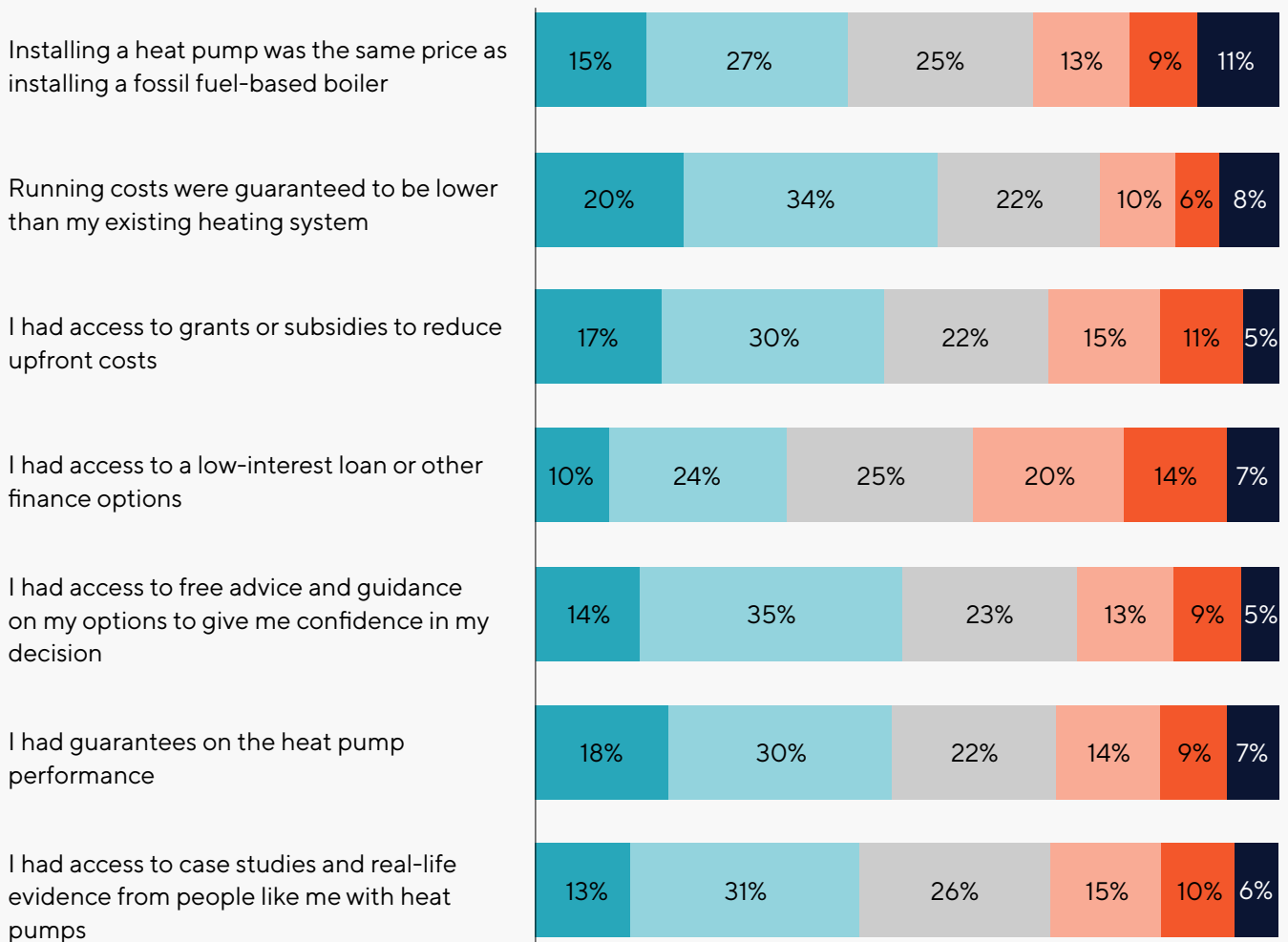
### Main reasons that respondents oppose phasing out fossil fuel boiler installations



The statement that received the highest disagreement was “if I had access to a low interest loan or other finance options” at 34%. This disagreement also increased with age groups. This reflects the results of a previous report by The MCS Foundation, ‘Homeowner attitudes towards retrofit finance’,<sup>32</sup> where it was established that though finance is a familiar solution for many households, people are generally averse to taking out finance and will only do so when considered a “necessity”. Furthermore, in our homeowner attitudes to retrofit finance report, younger people tended to be more open to using financing options, reflecting the results here, where the proportion of those who either disagreed or strongly disagreed that a low interest loan or another finance option would encourage them to install a heat pump increased with age.

**Figure 7** - "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 = 3,021)

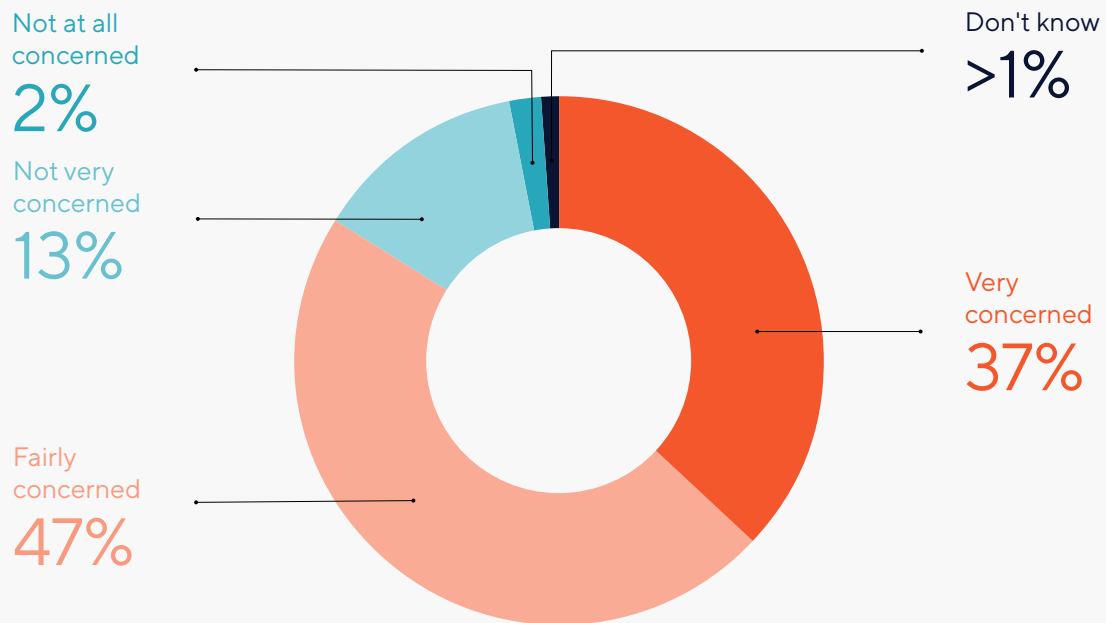
● Strongly Agree ● Agree ● Neither agree nor disagree ● Disagree ● Strongly disagree ● Don't know



## ➔ Attitudes towards 'Cut the Cost: Lower Electricity Prices'

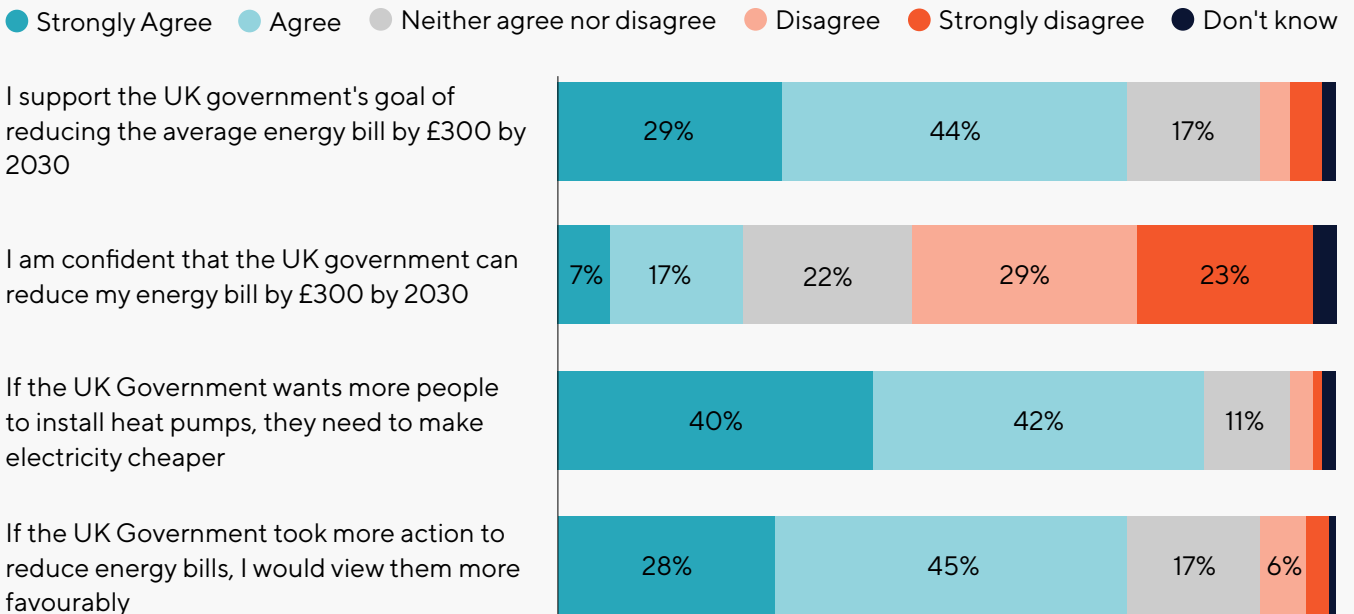
Energy cost concern is widespread, with 37% of respondents very concerned and 47% fairly concerned about their household bills over the coming year (Figure 8). For those in the 'financially vulnerable' demographic category of the survey, 91% were either fairly or very concerned. Only a small minority answered that they were "not very concerned" (13%) or "not at all concerned" (2%).

**Figure 8** - "To what extent are you concerned about the cost of your household energy bills over the next 12 months?" n = 3,021



The UK Government has committed to reducing energy bills by £300 by 2030.<sup>33</sup> Public support for this target is high, with nearly three quarters backing the goal (73%) (Figure 9). However, confidence in the UK Government's ability to deliver is poor, with over half of the survey respondents either disagreeing (29%) or strongly disagreeing (23%) that the goal will be achieved by 2030 (52%). While belief in the Government's ability to achieve it is poor, nearly three quarters of respondents (73%) either agreed (45%) or strongly agreed (28%) that they would view the UK Government more favourably if they took action to reduce energy bills (Figure 9). This presents a significant opportunity for the UK Government. While there is evidently a lack of confidence that they can achieve this goal, moving electricity levies into general taxation could not only lift hundreds of 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.

**Figure 9** - "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 = 3,021)

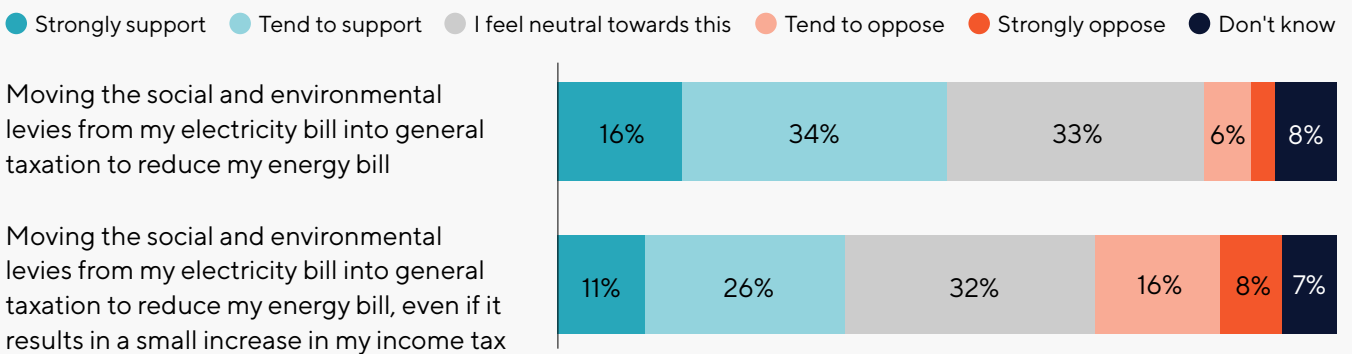


In terms of The MCS Foundation's specific policy ask, half (50%) of respondents supported moving social and environmental levies from electricity bills and into general taxation if it reduces energy bills (Figure 10). Like the earlier results, the highest level of net-support came from 25-34 year olds (60%). Respondents already using electric heating were more supportive than those on fossil fuel-based systems, as shown in Table 4. Only 6% opposed and 3% strongly opposed this proposal, so the UK Government should see this as promising and confidently continue to move the rest of the levies left on electricity now the initial Autumn Budget 2025 measures have been implemented.

**Table 4** - Net support for “Moving the social and environmental levies from my electricity bill into general taxation to reduce my energy bill” amongst heating type categories

Gas central heating	Heat pump	Electric storage heaters	Solid fuel central heating	Oil central heating	Liquified Petroleum Gas (LPG) central heating
47%	65%	59%	50%	52%	54%

**Figure 10** - “Given the previous information we shared, to what extent do you support or oppose the following proposals?” (n = 3,021)



Although support falls when framed in the case where it would result in a small increase in the respondent’s income tax, 69% of respondents still either supported (26%), strongly supported (11%), or felt neutral towards it (32%). The results here differ from the Scotland survey, as this time, support was similar across income levels, and the “below median income” showing the highest level of support (42%), compared to the “above median income” in the Scotland survey (48%). These results show the high level of neutrality that exists, with more respondents feeling neutral than supportive. This theme was present across both campaign areas; almost a quarter (24%) felt neutral towards the “commit to clean heat” proposal, and similarly, nearly as many respondents felt neutral (33%) about the policy to move electricity levies into general taxation as those who tended to support it (34%).

These findings suggest that a substantial portion of the public remains undecided on the campaign areas, highlighting an opportunity to increase overall support by addressing concerns and clearly communicating the benefits of the policies. Targeted information and emphasis on tangible advantages could help move those who are currently neutral toward a supportive position.

# Conclusions and recommendations

Based on the survey findings, there is broad public support in England and Wales for our two current campaigns, 'Commit to Clean Heat' and 'Cut the Cost: Lower Electricity Prices', consistent with the results established in our previous Scotland survey.

Firstly, there was strong agreement with the proposal to commit to clean heat, with most respondents in favour. However, this re-established the importance of language when communicating this policy that was found in the Scotland survey. When phrased as "committing to clean heat, ensuring all new heating systems have zero-carbon emissions from 2035", support increased to 58%, compared to 50% 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"

58%

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

50%

Secondly, with widespread concern about the cost of household energy bills, half of respondents supported moving social and environmental levies from electricity bills to general taxation to address this issue. There was also a large proportion of respondents who felt neutral towards both campaign areas.

Like in our Scotland survey, the results here 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 always cheaper to run than a fossil-fuel based boiler, which is not currently the case. Almost half of respondents also answered that they could be encouraged to make the switch if they had access to free advice and guidance, highlighting the important role the Warm Homes Agency could play in supporting households through the transition.



**Based on the results of this survey, we recommend the UK Government implement the following:**

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**1. Commit to clean heat, ensuring all new heating systems have zero carbon emissions from 2035.**

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

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**2. Communicate the policy to the public using clear and positive language.**

the use of terms such as “ban” and “phase out”, and frame it as a “commitment to clean heat”.

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**3. Move all social and environmental levies from electricity bills to general taxation to cut the cost of electricity.**

This will not only help tackle fuel poverty, but also ensure that heat pumps are cheaper to run than fossil fuel-based boilers.

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**We also recommend that the Welsh Government:**

**4. Actively press the UK Government to move social and environmental levies from electricity bills to general taxation to reduce electricity prices and support the transition to low-carbon heating in Wales.**

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For the UK to meet its 2050 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 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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