Which?

Warming up to change

Homeowners' uptake and attitudes towards home energy technology

Which?'s Annual Sustainability Report Series 2025

POLICY RESEARCH REPORT OCTOBER 2025

This publication reflects the view of Which?.

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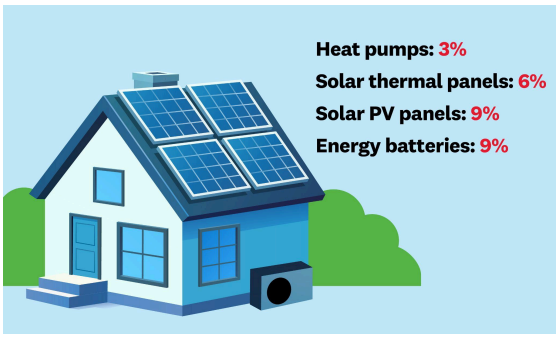
Executive summary

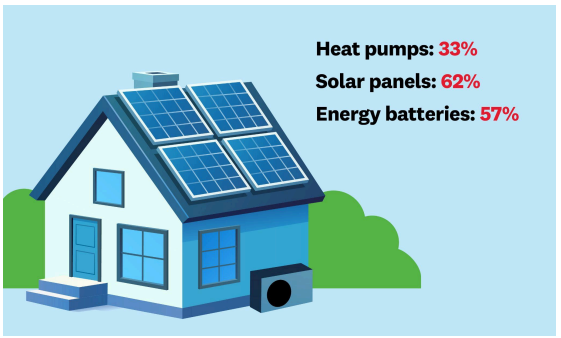
Over the next decade, millions of UK households will be encouraged to switch from gas and oil heating to electric systems, such as a heat pump, as part of the government's drive to reduce energy bills, improve energy security and cut carbon emissions. Alongside more widespread adoption of heat pumps, there is also expected to be growing interest from households in installing solar panels and batteries as they look to make further savings on their energy bills.

This change has started, but has a long way to go. Our research shows that the number of households that have heat pumps, solar panels and batteries is still low, however, in the last year awareness of heat pumps and the number of homeowners that are open to considering installing one has risen significantly. Willingness to consider installing solar panels and batteries was already higher than heat pumps, but has remained strong, with nearly two thirds open to installing solar panels, and only slightly fewer considering installing a battery in the future.

Homeowners adoption of home energy technologies



Homeowners consideration of home energy technologies



The UK government's Warm Homes Plan, which is expected to be published this year, has a clear challenge: to build on this progress by establishing strong incentives for homeowners to be part of this transformation, and addressing the barriers that many still see in switching from fossil fuel heating to new electrified systems.

Providing a clear financial argument for purchasing a heat pump, solar panels and batteries will be critical to increasing demand. The vast majority of homeowners (79%) continue to be concerned about energy bills that, despite falling from their peak in 2022, have remained at historically high levels. Our research shows that the ability to save money on energy bills stands out as the main motivating factor amongst homeowners that would consider purchasing solar panels, and as the main motivating factor for many homeowners that are considering purchasing a heat pump.

This remains a difficult challenge for the government. Action to improve the quality of heat pump installations will improve efficiency, and wider uptake of smart tariffs will help to reduce bills. However, addressing past policies that increased the cost of electricity in comparison to

gas are difficult to undo without increasing pressure on public finances or increasing prices for the majority of homeowners that still rely on gas for their heating. Any rebalancing of prices would have to ensure that homeowners who are already struggling to afford their bills are protected from additional costs.

The main barrier preventing homeowners from installing heat pumps, solar panels, and batteries remains the significant cost of installing them, with 67% of homeowners saying the upfront cost of installing a heat pump was a barrier. This is consistent across different income levels, suggesting that, for some homeowners the financial barrier reflects their ability to pay, while for others it reflects their willingness to pay these upfront costs. In order for government policy to be successful, it is important that homeowners who are unable to pay for these changes are supported with a combination of grant funding and financial products that help to make costs more affordable.

The reasons why homeowners may be unwilling to pay for heat pumps is reflected in the number that are unsure whether a heat pump will heat their home effectively (40%), or whether a heat pump will reduce their energy bills (29%). Supporting these households to understand if heat pumps are the right choice for their home will require good quality independent information and advice to be readily available, and measures to build consumer confidence by improving the quality of installations and ensuring effective redress if anything goes wrong.

In order to make the transition to electrified heating work for homeowners we have made the following recommendations to the UK government:

Tackle concerns about the financial cost of heat pumps

- Provide grant support for households that can't afford an efficient low carbon heating system.
- Ensure there are robust consumer protections in place for heat pump financing so that homeowners have the confidence to use financial products to make a heat pump purchase more affordable.
- Reduce the running costs of heat pumps to create a stronger financial argument for homeowners. This is likely to require a rebalancing of gas and electricity prices, but this must avoid negative financial impacts on low income households. Wider adoption of smart tariffs and measures to improve the quality of heat pump installations will also make an important contribution to lower running costs.

Provide good quality independent information and advice

- UK and national governments, local authorities and businesses to signpost consumers to good quality independent advice about heat pumps.
- The UK and Scottish governments to work with businesses to develop a clear strategy for ensuring t homeowners have access to good quality information and advice at the times when they are more likely to consider changing their heating.

- The UK and Scottish Governments to reform Energy Performance Certificates so that they are more reliable, relevant and easier to understand.[1]

Introduce mandatory MCS certification of installers

- Make MCS certification of all heat pump, solar and battery installers mandatory and provide effective oversight of the scheme to ensure it is meeting agreed objectives.
- Certification should be mandatory for all installers whether work is done under a government funded scheme, with a bank loan, or if the work is self funded.

[1] Which? (2024). Transforming EPCs: Consumer Research Insights and Recommendations.

Introduction

Over the next decade, government policies are expected to significantly change the way that UK households heat their homes.[2] As part of the government's plans to cut energy costs, improve energy security, and tackle climate change, the more than 90% of UK households that currently use gas and oil to heat their homes will be encouraged to switch to new electric heating systems, such as a heat pump.[3] The number of households installing heat pumps is already increasing rapidly, with heat pump installations under the Boiler Upgrade Scheme up 57% year on year in Q2 2025.[4] However, this is from a low base and is considerably below what is required to meet the Climate Change Committee's recommendation that half of UK homes will need to have switched to a low carbon heat pump by 2040.[5]

With gas and oil home heating currently responsible for 18% of UK carbon emissions,[6] a major benefit of the switch to heat pumps is that they will run on low carbon electricity.[7] In the UK there is widespread support for action to tackle climate change. Our research shows that three in four homeowners (77%) are concerned about climate change and almost four in five (79%) feel a personal responsibility to reduce their impact on the environment. Over half (56%) feel that they personally should be doing more to reduce their impact on the environment.

However, our findings also suggest that many homeowners are unaware of the major impact that gas and oil heating systems have on carbon emissions. When we asked consumers which sustainable behaviours they thought would lead to the greatest reduction in carbon emissions (regardless of whether they do the activity or not), they ranked reducing home energy use and greener electricity supply highest. Installing a heat pump was ranked 8th out of nine options, despite it being one of the most effective ways that most homeowners could reduce their emissions.[8]

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[2] This paper is primarily focused on UK government policy however some aspects of policy on home heating are devolved. The Scottish government has its own grants and loans for home heating, provides an energy advice service and runs its own awareness campaigns. Wales and Northern Ireland also have their own advice services. The Scottish government is expected to publish its Heat in Buildings bill before the end of this year.

[3] Research by the Electrification of Heat Demonstration Project shows that "heat pumps can be successfully installed in all the types of property which were tested by the Project and can operate with good efficiency and provide positive consumer heating experiences." Other low carbon heating options such as heat networks and electric boilers will be appropriate for some properties.

[4] Project Ambient (2025). Electrified heat transition tracker.

[5] Climate Change Committee (2025). Progress in reducing emissions – 2025 report to Parliament.

[6] NAO (2024). Decarbonising home heating.

[7] Currently home heating accounts for 18% of UK carbon emissions.

[8] Full ranking from greatest reduction to smallest reduction: 1st: Reduce home energy use, 2nd: Receive electricity supply from greener sources, 3rd: Reduce holiday travel emissions, 4th: Reduce car use in favour of alternative transport, 5th: Improve home insulation, 6th: Switch to an electric vehicle, 7th: Reduce and recycle food waste, 8th: Install a heat pump, 9th: Consume less red meat and dairy. The CCC has said "the most impactful decisions most households will make are purchasing an electric car and a heat pump. Choices such as meat and dairy consumption and flying make smaller, but important contributions." CCC (2025) The Seventh Carbon Budget Advice for the UK government.

As well as tackling climate change, the switch to electrified heat also has the potential to reduce households' energy costs. A well installed heat pump can cost the same or less to run than a gas boiler and further cost savings can be achieved by switching to a smart tariff.[9] The addition of solar panels to generate energy, and batteries to store energy either from the solar panels or when energy is cheaper with the smart tariff, will further reduce running costs.

Insulation measures such as loft insulation, cavity wall insulation and double glazing remain important ways to improve the energy efficiency of a home, and draught proofing can also greatly improve the comfort of a home. Solid wall insulation and underfloor insulation are more expensive and disruptive measures that may be suitable as part of a larger home renovation project. As many homes now have the more cost effective measures, such as loft and cavity wall insulation, installed we do not give insulation as much attention in this report, but it remains important for those households that don't.

The government is expected to publish a Warm Homes Plan before the end of 2025 that will set out their longer term strategy for home heating. The government currently offers a £7,500 grant towards the installation of a heat pump, and full grant funding for heating and insulation upgrades are available for low income households through local government and Energy Company Obligation schemes. The UK government is also conducting an awareness campaign, providing information on heat, pumps, solar, batteries and insulation through its website.

Over the past four years, our annual Sustainability Tracker Survey has tracked consumer attitudes towards sustainability, behaviours and barriers to change. This includes home energy technologies such as heat pumps, solar panels and energy batteries. This report outlines key insights from this research and what these mean for the government plans for home heating.

Methodology

Our Sustainability Tracker is a yearly omnibus survey, with a nationally representative sample of around 2,000 UK adults each wave, covering topics like travelling behaviours, home heating and food habits. This report focuses on results from the 1,392 homeowners who completed the survey in June 2025. More details regarding the methodology of our annual sustainability tracker survey can be found on our Sustainability Tracker page.

[9] Oriel College, Univ of Oxford (2025). Average UK three-person household could save up to £465 a year with a heat pump

Research findings

Key insights

- We have seen a significant increase in homeowners interest in installing a heat pump. A third of homeowners (33%) are currently open to heating their home by a heat pump in the future, up from 26% just a year ago.
- Six in ten homeowners (62%) in June this year said they would or might consider installing solar panels in the future, much like the 64% at the same point in time last year.
- Cost remains the main barrier to adoption. Two thirds (66%) of homeowners surveyed without a heat pump but know what they are said that the installation costs would stop them from getting one in the future.
- Four in ten (40%) said they are not convinced that heat pump technology is good enough to heat their home, and three in ten (29%) worry they might end up paying more for their energy bills.
- Those who know any family, friends or neighbours with a heat pump are much more open to installing one (55%), compared to those who don't know anyone with a heat pump (30%), demonstrating the importance of social proof in adoption.

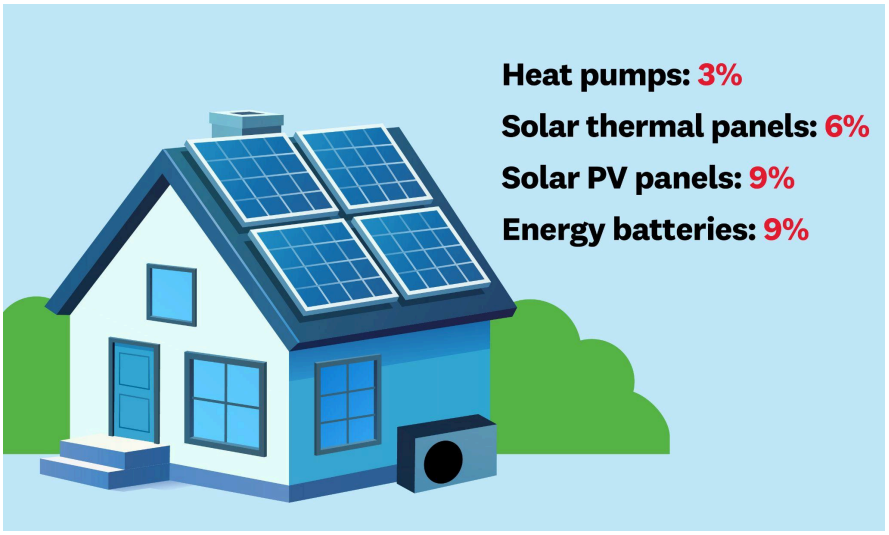
Limited consumer uptake of green energy technologies

Heat pump ownership has seen little change over the last three years in our tracker. In 2023 and 2024 ownership remained at 2%, rising slightly to 3% in June 2025 (Figure 1).

More established home energy technologies have a higher uptake. Just over one in ten homeowners (12%) report having solar panels (6% having solar thermal panels and 9% solar PV panels).[10] This is similar to last year when 11% of homeowners reported having solar panels (June 2024). 9% of homeowners reported having energy batteries in June this year, with 43% of homeowners with solar panels reporting having energy batteries.

[10] 3% of homeowners reported having both solar thermal and solar PV panels.

Figure 1: Homeowners adoption of home energy technologies

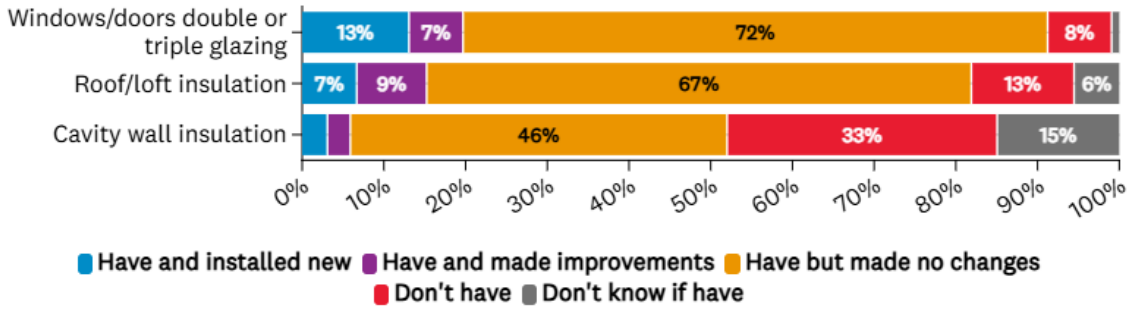


Bases: UK homeowners (1,392). Data is weighted to represent the adult population of the UK by age, gender, region, social grade, working status and housing tenure. Question: Does your home currently have each of the following types of insulation and energy technologies?

Insulation measures can improve the energy efficiency of a home and improve the performance of these home energy technologies. The vast majority of homeowners now have most of the more cost effective measures installed. Nine in 10 report having double or triple glazing for their windows and doors (91%) and eight in 10 report having roof/loft insulation (82%). This includes one in five homeowners reporting to have improved or installed new glazing in the past two years (13% installed new double or triple glazing and 7% said they made improvements). 7% of homeowners reported installing new roof/loft insulation over the same time period, with 9% making improvements to existing insulation (Figure 2).

Cavity wall insulation is less common with just over half of homeowners (52%) reported having cavity wall insulation, with 3% reporting installing new insulation and 3% reporting making improvements in the past two years. However, accounting for the fact that about 30% of homes don't have cavity walls,[11] roughly 75% of homeowners with cavity walls have insulation installed.

Figure 2: Insulation homeowners have and behaviours in the last two years



Base: UK homeowners. Approximately 1,300-1,450 respondents per wave. Data are unweighted. Question: Does your home have any of the following insulation improvements?

[11] DESNZ (2025). Household Energy Efficiency Great Britain, Data to December 2024.

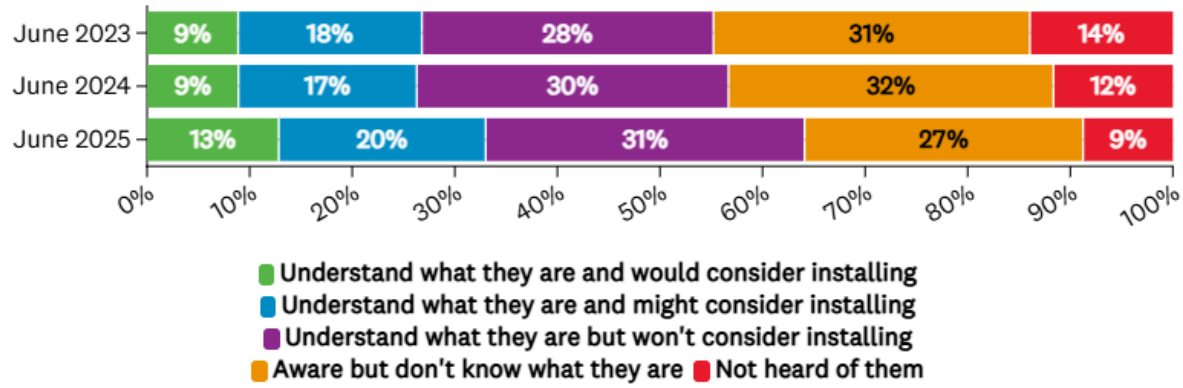
The potential for growth

Although uptake of home energy technologies has been limited so far, we have seen significant progress in homeowners' openness to heat pumps over the past year.

Firstly, awareness of the technology has grown significantly. Almost two thirds (64%) of homeowners reported that they have heard of and know what heat pumps are. This is up eight percentage points from 56% last year (June 2024) (Figure 3).

Secondly, the increase in awareness is translating into greater interest. A higher proportion of homeowners said they will or might consider installing a heat pump if they need to replace their current heating system in the next 12 months (13% and 20% respectively). Collectively, this means a third of homeowners (33%) are now open to heating their home with a heat pump in the future, up from 26% just a year ago.

Figure 3: Homeowners' understanding and willingness to install heat pumps has grown in the last year



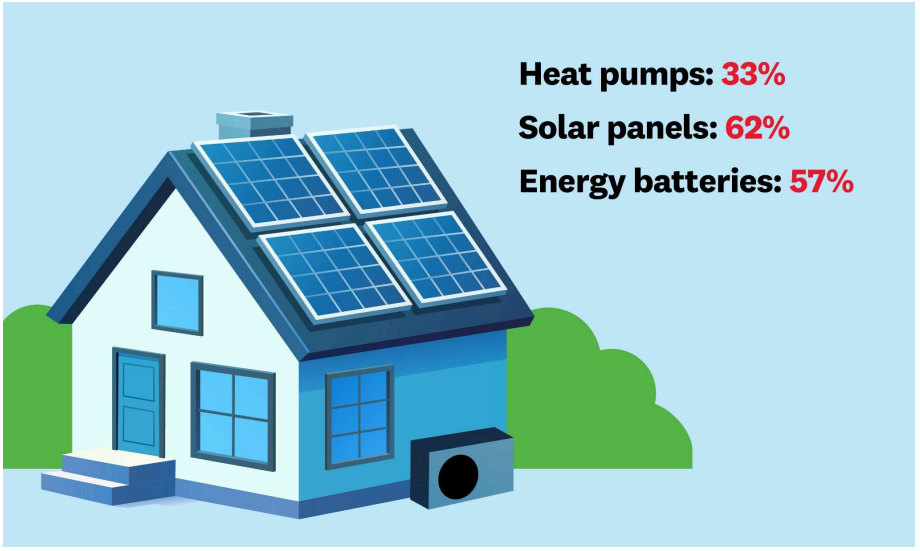
Base: UK homeowners without a heat pump. Approximately 1,300-1,450 respondents per wave. Data are unweighted. Questions: The government intends for all homes to move to low carbon heating systems, which could include a ban on installations of new gas boilers by the mid-2030s. One example of a low carbon system is heat pumps. Before taking this survey, had you heard of heat pumps as a home heating system? AND Please imagine that you need to replace your current heating system in the next 12 months (i.e. by July 2026)... Would you consider installing a heat pump in your home?

Homeowners' openness to having solar panels in their home remains much higher than for heat pumps. This is likely to be a reflection of solar panels having been advertised and promoted to homeowners much longer than heat pumps. Six in ten homeowners (62%) in June this year said they would or might consider installing solar panels in the future (Figure 4). Last year, the proportion was very similar, with 64% saying they would or might consider installing solar panels in their homes. This could suggest that interest in solar panels is reaching a natural limit, as many of those who can afford them or have suitable properties are already open to the idea.

Interest in solar panels is high, but they are not the only technology homeowners are considering. A similar number of homeowners (57%) said they would or might consider installing energy batteries in their home in the future.

These figures suggest that many homeowners are open to installing greener energy technology in their homes that could help to reduce the cost of running a heat pump if one was installed.

Figure 4: Homeowners' consideration of home energy technologies



Bases: UK homeowners without a heat pump (1,348), solar panels (1,255), energy batteries (1,267). Data are unweighted. Questions: Please imagine that you need to replace your current heating system in the next 12 months (i.e. by July 2026)... Would you consider installing a heat pump in your home? AND Would you consider installing the following solar panels in your home in the future?

Installation cost, uncertainty over new technology, and energy bill worries are slowing adoption

Despite signs of increased awareness and willingness to consider heat pumps, major barriers still remain to consumers installing heat pumps and other green energy technologies. The upfront costs of installing heat pumps, solar panels and batteries have consistently been the main barrier that homeowners identify.

Two thirds (67%) of homeowners we surveyed who know about heat pumps but don't own one, said the installation costs would stop them from getting a heat pump (Figure 5). This has stayed broadly consistent over the past three years (68% in June 2023, 71% in June 2024) and is markedly above any other barrier we ask about.

Installation cost is a key hurdle for solar panels too, with six in ten (58%) homeowners who don't yet have them saying the installation expense would prevent them from installing one. This is consistent across different income levels.

For some homeowners this will be a reflection of simply being '*unable*' to afford the cost of a heat pump or solar panels. For others, it may not be that they can't afford it, but that they are '*not willing*' to pay. They may not yet see a strong enough reason to invest in these technologies or feel sufficiently convinced that it is the right choice for them. Four in ten (40%) said they are not convinced that heat pump technology is good enough to heat their home, and three in ten (29%) worry they might end up paying more for their energy bills.

Figure 5: Main barriers to adopting heat pumps and solar panels

Technology	Top barrier	2nd highest barrier	3rd highest barrier
Heat pumps	Installation cost (67%)	Technology not proven enough (40%)	Concern about higher energy bills (29%)
Solar panels	Installation cost (58%)	Energy bill savings may not be enough (28%)	Not suitable for my property (20%)

Bases: Split sample of UK homeowners without a heat pump (416) or solar panels (614). Data are unweighted. Questions: Which, if any, of the following do you think would prevent you from installing a heat pump in your home/solar panels?

For solar panels, similar concerns emerge with 28% who said they worry that the savings on energy bills wouldn't be enough to make them worthwhile, and one in five (20%) believe solar panels would not be suitable for their property.

It's essential to address the barriers we've identified so that potential adopters feel confident taking the first step.

Motivating factors for homeowners

Whilst the high cost of installing these technologies is a barrier for homeowners, the potential to save money in the long run is a key benefit in homeowners' eyes. Lowering energy bills was the main motivating factor for those who have installed solar panels already (54%). It is also the most likely encouraging factor for those who would consider installing them in the future (58%) (Figure 6). These figures are more than twice as high as those saying the top benefit of solar panels for them is that they are environmentally friendly and sustainable (25% and 22% respectively).

Figure 6: Benefits of solar panels that encourage homeowners the most

Bases: UK homeowners with solar panels (145), without solar panels or would or might consider installing in the future (758). Data are unweighted. Questions: Which ONE of the following benefits about solar panels [encouraged/ is most likely to encourage] you to have solar panels in your home [in the future]?

Homeowners' priorities here are not surprising against the backdrop of consumer concern about energy prices and rising energy debt.[12] Four in five homeowners reported being worried about energy prices in August 2025 (79%). This concern rose dramatically during the energy crisis and has remained high since (Figure 7). Whilst some of this concern reflects ongoing household energy debt issues, it also indicates that the energy crisis has had a lasting impact on how households view their energy costs.

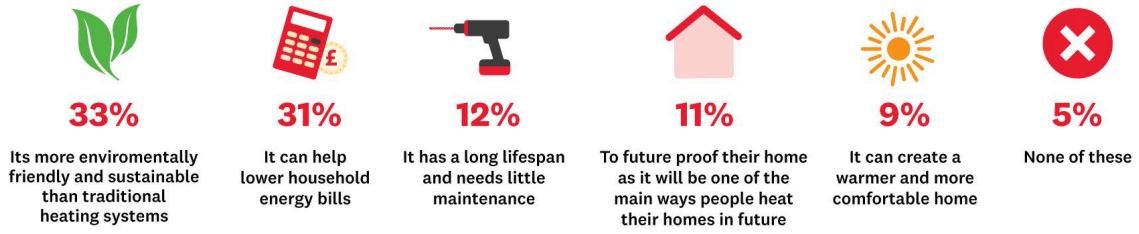
[12] Ofgem (2025). Debt and arrears indicators.

Figure 7: Homeowners' worry about energy prices

Source: Which? Consumer Insight Tracker. Approximately 2,000 respondents per wave. UK level data are weighted to represent the adult population of the UK by age, gender, region, social grade, working status and housing tenure. Respondents had the option to select not applicable if they felt that consumer issue did not apply to them. If they selected 'not applicable' they are not included in the proportion.

Homeowners who said they would consider installing a heat pump in the future were more mixed on what benefit would most likely encourage them to install one.[13] Similar proportions pointed to environmental reasons (33%) and lowering energy bills (31%), with just under one in four (23%) homeowners surveyed saying they would be more motivated by longevity reasons (Figure 8).

Figure 8: Benefits of heat pumps that encourage homeowners the most



Bases: UK homeowners without a heat pump and would or might consider installing in the future (445). Data are unweighted. Questions: Which ONE of the following benefits about heat pumps is most likely to encourage you to have solar panels in your home in the future?

[13] As heat pump ownership is still very low we do not have a sufficient sample size to report on the reasons why those homeowners installed one.

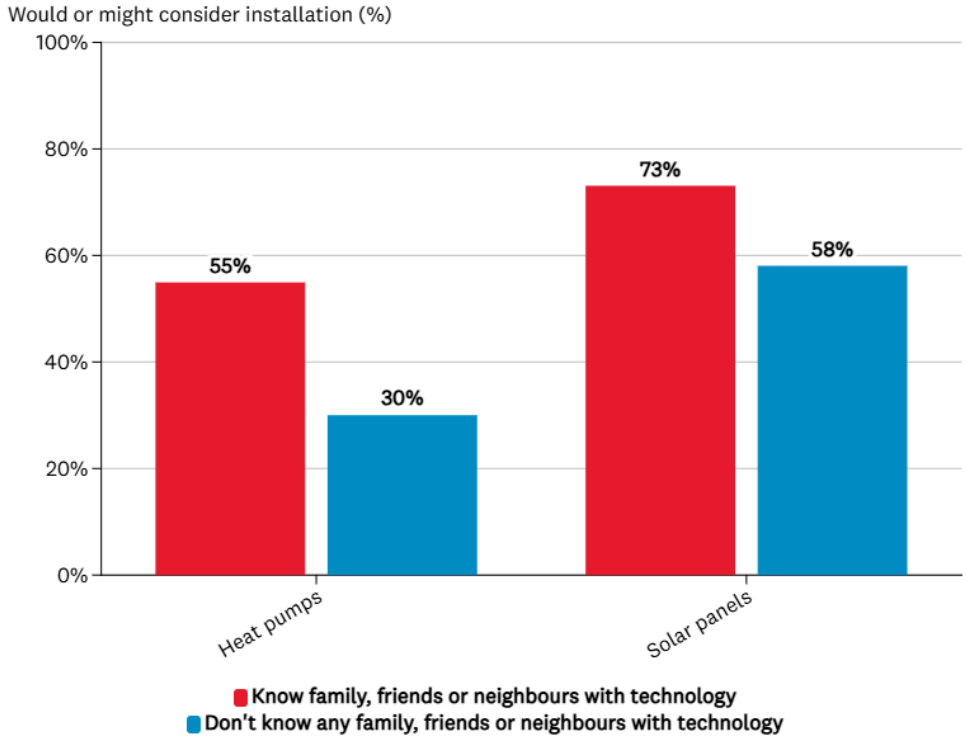
This data shows that homeowners have a strong interest in cutting their energy bills and they are open to green energy technology to meet this aim. For the government this highlights again the importance of creating a stronger financial argument for homeowners to adopt these technologies, and communicating the potential for savings through the adoption of different equipment and tariffs. However, upfront costs will remain a barrier for many, with households requiring grants or financial products to make these costs more affordable.

Knowing people with these technologies improves homeowners' attitudes towards them

Those who know any family, friends or neighbours with a heat pump are much more open to installing a heat pump. Over half of homeowners (55%) surveyed who said they know someone with a heat pump said they would or might consider installing one in the future, compared to just 30% of those who do not know someone (Figure 9).

This finding was similar for solar panels. Almost three in four (73%) of homeowners surveyed who know any family, friends or neighbours with solar panels said they would or might consider installing them in the future, compared to 58% amongst those who do not know anyone.

Figure 9: Those who know family, friends or neighbours with heat pumps and solar panels are more open to installing them in the future



Bases: UK homeowners (1,392). Data is weighted to represent the adult population of the UK by age, gender, region, social grade, working status and housing tenure. Questions: Do you know any family, friends, or neighbours that have any of the following?

This data indicates the potential for network effects, whereby the growth in adoption of green energy technology should increase awareness and willingness of friends, family and

neighbours. It does stress though the importance of early adopters having positive experiences with these technologies, or else negative experiences could have a detrimental effect on their peers' views towards adoption. It is therefore important that these technologies are carried out by qualified installers and consumers have access to redress if things go wrong.

The impact on government plans for home heating

Key messages

- The Warm Homes Plan is an opportunity to address the barriers that homeowners face when installing a heat pump.
- The government should address homeowners' concerns about the cost of getting a heat pump - including grants and financial products to tackle upfront costs and measures to reduce running costs.
- The government and businesses should signpost homeowners to good quality independent information and advice, and have a clear strategy for ensuring homeowners have access to this information at the times when they are more likely to consider changing their heating.
- The government should introduce mandatory MCS certification of heat pump installers to ensure heat pump installations meet high standards and homeowners can swiftly resolve any complaints and disputes.

The UK is at a critical juncture in the adoption of electrified heating. Our research shows that, while adoption is still relatively low, homeowners' awareness and willingness to install a heat pump is increasing. In order for progress to continue, it is important that the government creates the right incentives and addresses the barriers to getting a heat pump, so that homeowners can see the benefits of changing their heating and make the change when they are ready. The ability to also install solar panels and batteries will help consumers realise further benefits, including lower running costs and flexibility as to when and how they use energy in their home.

An important aspect of these changes is the reduction in carbon emissions that they will deliver. Our survey showed that homeowners want to take action to reduce their carbon emissions but more than three quarters also want to see the government (76%) and businesses (energy providers 79% and oil and gas companies 81%) doing more to help reduce the UK's impact on the environment.

The upcoming Warm Homes Plan presents an important opportunity for the government to make heat pumps an affordable and trusted option by addressing the financial costs of installing a heat pump, and giving homeowners the confidence that they are making the right choices for themselves and their families[14] by:

1. tackling concerns about the financial cost of installing heat pumps,
2. providing good quality independent information and advice,
3. introducing mandatory MCS certification of installers.

[14] Which? (2025). The Warm Homes Plan: recommendations for supporting homeowners.

Tackle concerns about the financial cost of heat pumps

The cost of installation has consistently been the main barrier homeowners cite to installation across the green energy technologies we included in our survey. In some cases this will be because households cannot afford the cost of these technologies and for others it will indicate a lack of willingness to pay.

We recommend the UK government:

- provides grant support for households that can't afford an efficient low carbon heating system.
- ensure there are robust consumer protections in place for heat pump financing so that homeowners have the confidence to use financial products to make a heat pump purchase more affordable.
- reduce the running costs of heat pumps to create a stronger financial argument for homeowners. This is likely to require a rebalancing of gas and electricity prices, but this must avoid negative financial impacts on low income households. Wider adoption of smart tariffs and measures to improve the quality of heat pump installations will also make an important contribution to lower running costs.

Provide good quality independent information and advice

Our research shows that awareness and understanding of heat pumps is increasing. However, over a third of homeowners (36%) do not know what heat pumps are (9% have not heard of them and 27% are aware of them but don't know what they are). For most homeowners heat pumps will still be relatively unfamiliar technology for the foreseeable future.

We recommend:

- UK and national governments, local authorities and businesses signpost consumers to good quality independent advice about heat pumps.
- the UK and Scottish governments work with businesses to develop a clear strategy for ensuring that homeowners have access to good quality information and advice at the times when they are more likely to consider changing their heating.
- the UK and Scottish Governments to reform Energy Performance Certificates so that they are more reliable, relevant and easier to understand.[15]

Introduce mandatory MCS certification of installers

How well heat pumps, solar panels and batteries are installed and the ability to quickly get things put right if something goes wrong, is critical to building consumers' trust and confidence. A heat pump that is installed well will also be more efficient and cheaper to run.

Previous Which? research has highlighted low consumer confidence in the wider home improvements sector with 55% of consumers saying they find it hard to trust trader information (e.g. traders' own claims and customer reviews) and anxiety about being let

[15] Which? (2024). Transforming EPCs: Consumer Research Insights and Recommendations.

down or 'ripped off' is a significant factor in putting off necessary home improvements - with one in five saying they had put off a home improvements project for this reason.[16]

Additionally, this research has shown that having friends, family or neighbours with green energy technology is a positive indicator on homeowners willingness to consider installing green energy technology. This finding supports recent surveys that show heat pump owners are as happy with their purchase as gas boiler owners,[17] but bad installation experiences will likely have the opposite effect. It is therefore important that the government does all it can to ensure that those adopting green energy technologies have good experiences, both with the installation and performance of their technology.

We recommend the government:

- make MCS certification of all heat pump, solar and battery installers mandatory and ensure effective oversight of the scheme to ensure it is meeting agreed objectives.
- certification should be mandatory for all installers whether work is done under a government funded scheme, with a bank loan, or if the work is self funded.

[16] Nationally representative survey of 4,587 consumers in England and Wales who had employed a trader to do work in their home. Home Improvements Experience Survey conducted by Yonder, on behalf of Which?, July 2021.
[17] Nesta (2023). Heat pumps: a user survey.

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