



More in
Common



THERMAL
STORAGE UK



THE MCS
FOUNDATION



Tuesday, 30 September



10:00 to 11:00



Nova Scotia

The Heat Is On: Powering Up Britain's Home Energy Transition



**Charlie
Cooper (Chair)**
Politico



**Ed
Hodgson**
More in
Common



**Tom
Collins MP**
MP for
Worcester



**Caroline
Bragg**
ADE



**Jane
Dawson**
Electrical Contractors'
Association



**James
Naish MP**
MP for
Rushcliffe



**Richard
Hauxwell-Baldwin**
MCS
Foundation

Concern about climate change spans the breadth of the UK...

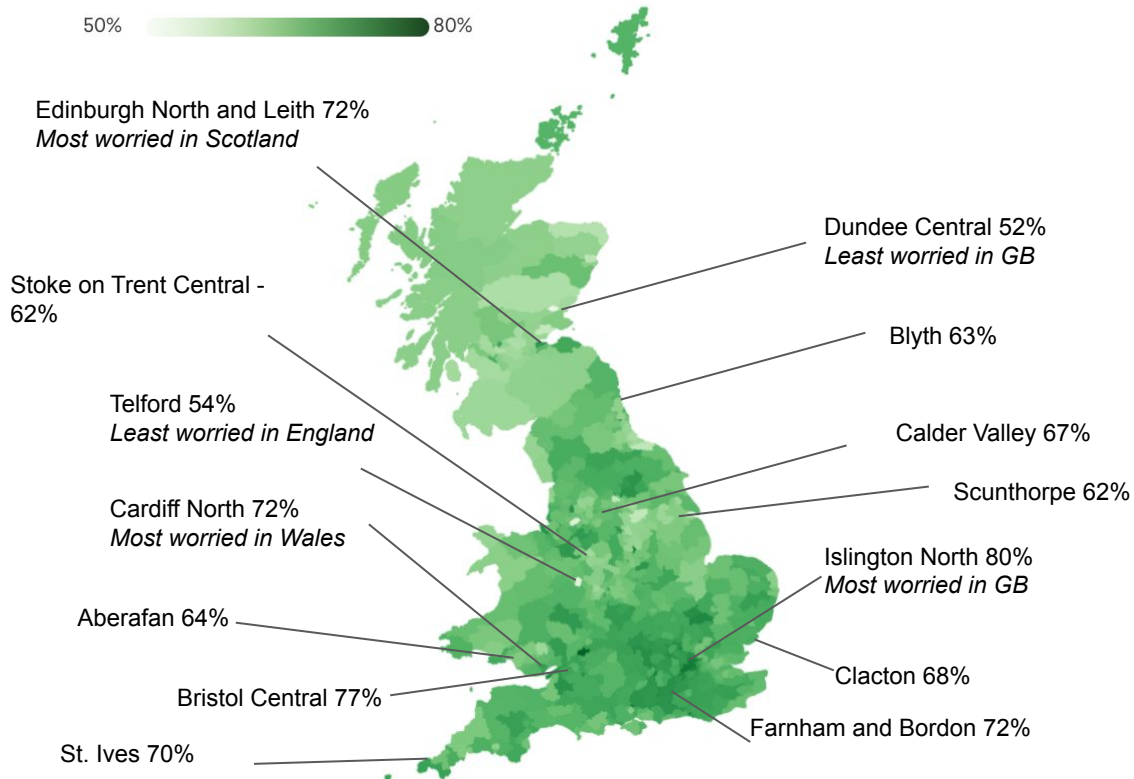
In every British constituency, the majority of people are worried about climate change - ranging from 52% in Dundee Central to 80% in Islington North.

While concern is highest (over 70% worried) in graduate-heavy metropolitan seats such as Islington North and Hackney South and Shoreditch, it is also above 60% in a range of former industrial seats and seaside towns such as Clacton (68%), Blyth (63%) and Stoke Central (62%).

How worried are you about climate change?

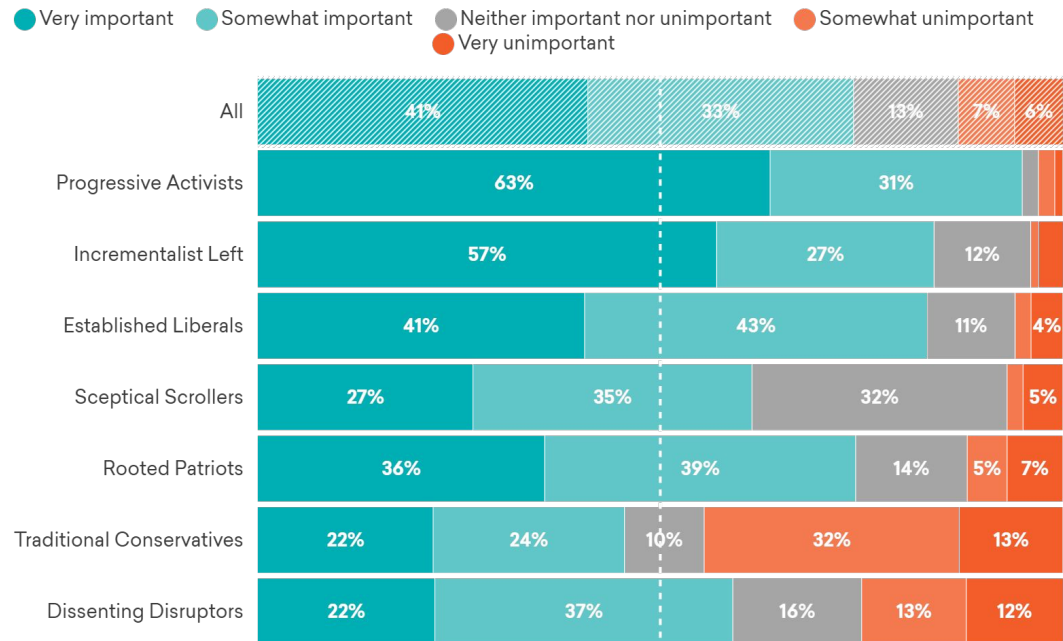
Total proportion saying they are somewhat or very worried

50%  80%



...and cuts across segments

How important, if at all, is the issue of climate change?



Concern about climate change is one of the few issues that spans the length and breadth of the country and brings together a broad coalition of voters.

“So it is concerning, yes, for myself but more for my grandkids. Is there going to be a planet for them or how are they going to cope? It's more worrying for them.”

- Jennifer, Retired, Essex

Concern about energy bills cuts across party lines but is strongest among Reform voters

Voters of all political parties are concerned about the impact of high energy bills but concern is strongest and most profound among those intending to vote for Reform UK - 80 per cent of whom are either very or somewhat concerned about the potential size of their energy bills this Winter.

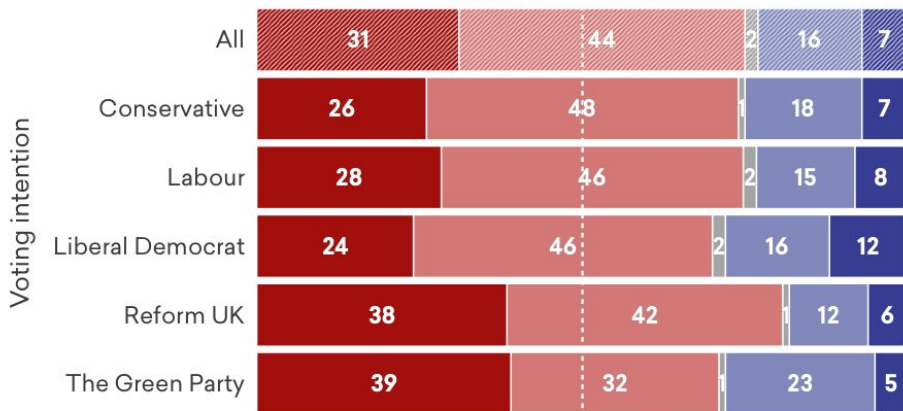
I've had to go onto a smart meter and I hate it. I can actually see how much I've got to pay... it makes me feel crappy to be honest because when you've worked really hard and you're nearly 50 and you're having to go on a smart meter so you can see what you've spent - yeah you want to get better in life, don't you? Not get worse.

Carly, Retail Manager, Stevenage

Reform and Green voters are the most concerned about this winter's energy bills

Thinking ahead to this winter, to what extent are you concerned, if at all, about the potential size of your energy bill?

- I am very concerned about the cost of my energy bills this winter
- I am somewhat concerned about the cost of my energy bills this winter
- Not applicable - I don't contribute to the cost of my energy bills
- I am not very concerned about the cost of my energy bills this winter
- I am not at all concerned about the cost of my energy bills this winter



A failure to bring bills down is undermining Britons' confidence in Labour's ability to bring the change they promised at the last election

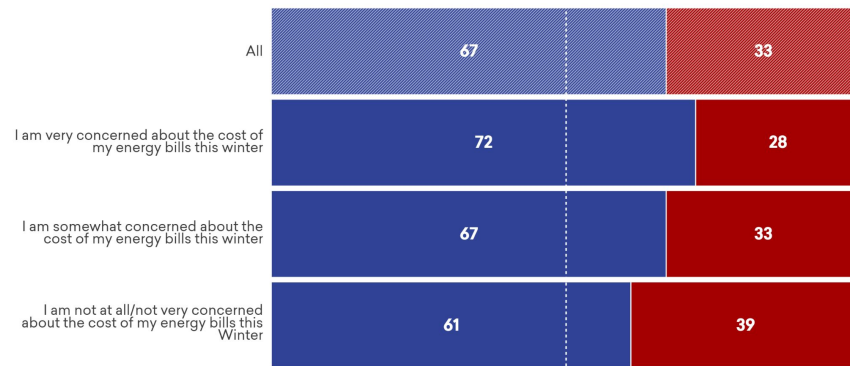
In focus group conversations it is clear that the perceived failure of the Government to take action to reduce energy bills - and to address the cost of living more broadly - is derailing public confidence in its ability to deliver the changes it promised. Focus group participants said they hadn't felt any difference since Labour's election win, either in terms of their confidence in government or their own ability to manage high bills.

Those who are very concerned about energy bills this winter are 11 percentage points more likely than those not concerned to say that this government feels like more of the same, rather than genuinely different.

Those with the highest concern about their energy bills are the most likely to think Labour has failed to be a government for change

Compared to our previous Conservative government, would you say that our new Labour government...

● Feels like more of the same ● Feels genuinely different



More in Common • August 2025

Tell me if I'm wrong, but I don't really hear anything. You hear that bills are going up or you hear that this company's made this much profit, but I never hear really much about what the government is doing. It's not really a big talking point, is it?

- Lisa, Stay at home mum, Stevenage

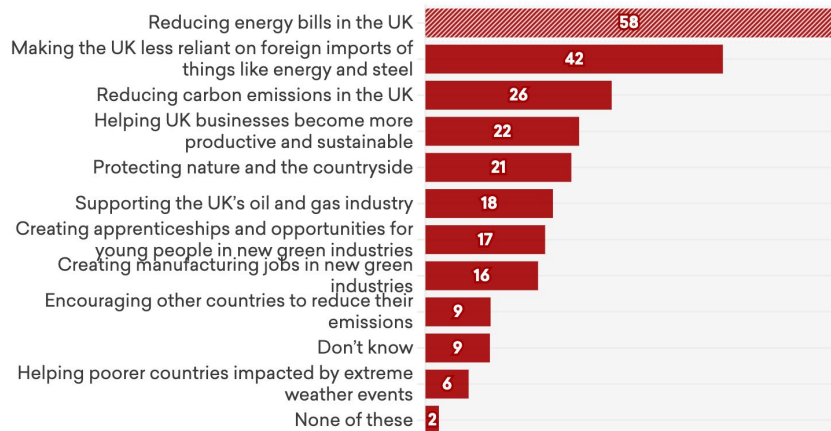
Expectation of lower bills

Asked to choose from a list of household costs, **energy bills are top of Britons' personal financial worries**, and are also the household cost the public thinks the government should be doing most to address.

The public is three times more likely to say energy bills will come down if we produce more energy from wind and solar than if we produce more energy from oil and gas.

As such, support for climate policies is driven by the fact that these policies win the argument on cost of living.

Which of the following do you think should be the main job of the Minister for Energy Security and Net Zero? Select up to three.



Many Britons believe renewables will reduce their bills

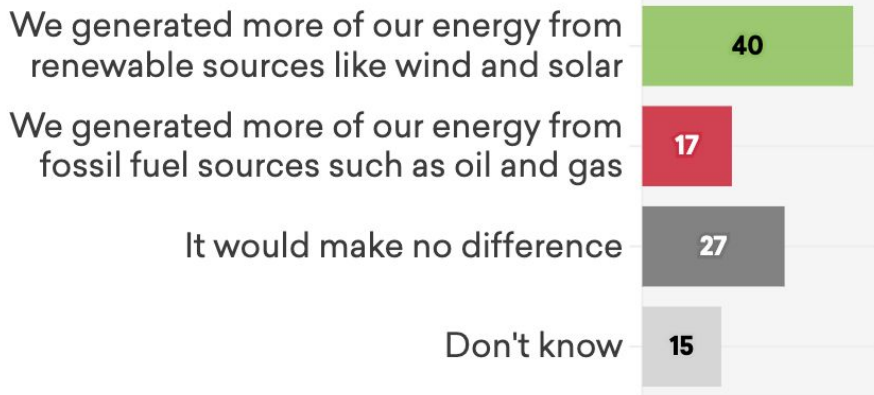
Part of the reason that climate action is popular in the UK is that **renewable energy is, for many, 'winning the argument' on cost of living**. Britons are **twice as likely** to think their bills would be cheaper if more of our energy came from renewables than if it came from fossil fuels.

"I think we need to use more of our own wind turbines and stuff. The reason why the energy bills and stuff are going up is because we're resourcing a lot of it from abroad instead of using our own natural resources and that's why the prices are skyrocketing. Whereas if they actually brought more in-house, using our own energy, the wind turbines, solar panels and using our own, then it wouldn't cost as much."

-Established Liberal, Hitchin

Britons much more likely to think their bills would be cheaper if we used more renewables

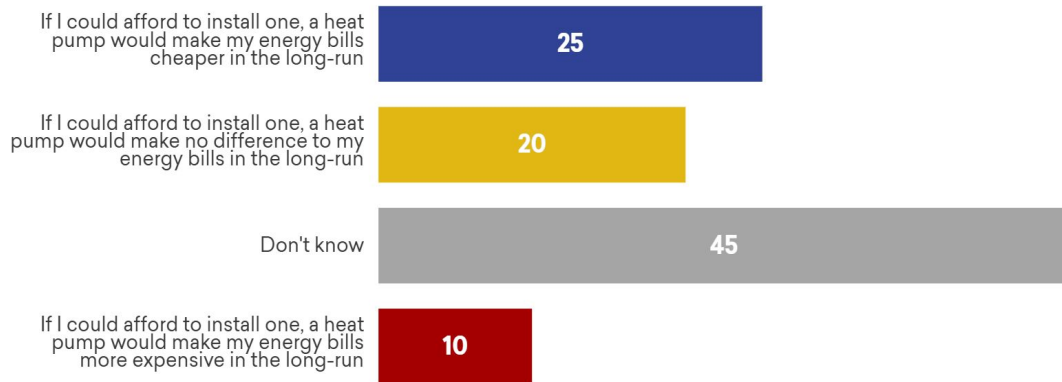
Do you think your energy bills would be lower if...



Barrier One - Concern about cost

Britons are unsure about heat pumps

Which of the following comes closest to your view?



Britons are not deeply resistant to low carbon heating but concerns about costs remain a barrier.

43 per cent of Britons say that gas boilers are better overall, compared to 25 per cent who say heat pumps are.

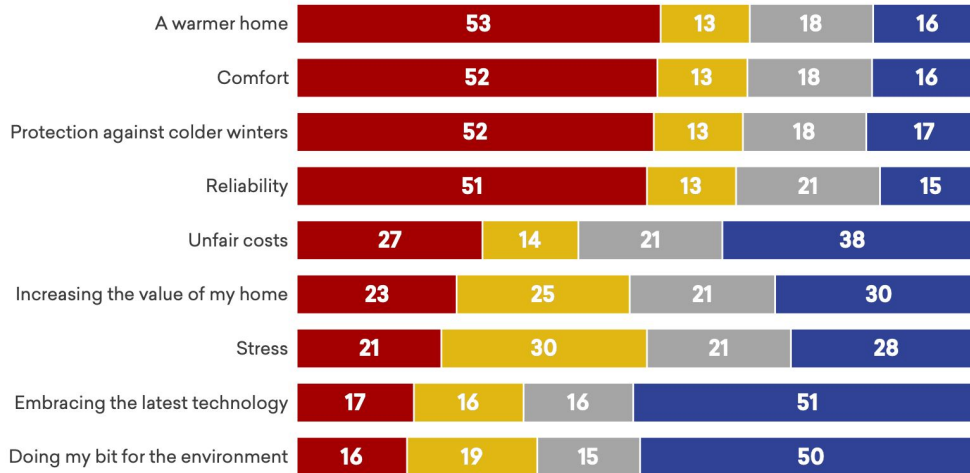
11 per cent more people say that gas boilers are cheaper to run than say heat pumps offer lower costs.

Barrier Two - Knowledge

Britons associate warmth and comfort with gas boilers

For each of the following items, please indicate whether you associate them more with heating your home with a heat pump, or with a gas boiler.

● I associate more with heating my home with a gas boiler ● Neither ● Don't know
● I associate more with heating my home with a heat pump



Source: More in Common • January 2024

The British public overall tends to think that gas boilers are much more functional and reliable than other options.

However, when asked if they are satisfied with the way they heat their home, those with heat pumps are the most likely to agree.

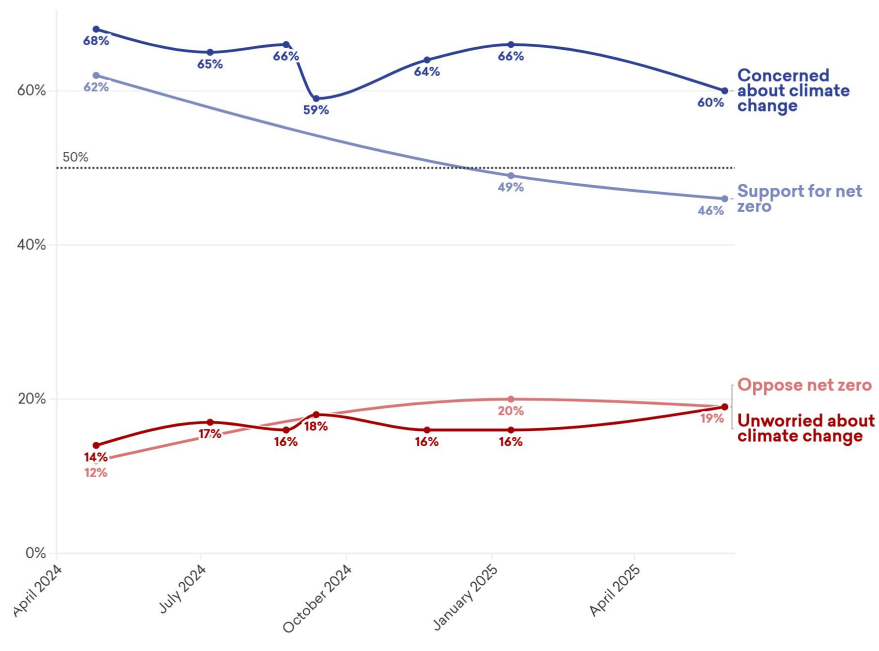
They're probably a good idea, but I don't know enough about them. I just know they're quite expensive to put one in and it wouldn't actually be any use in this house anyway of the way the house is heated

-

Rodney, Clacton

Net zero support decoupling from climate concern

Concern about climate change remains stable, but support for Net Zero has dropped



Britons remain concerned about climate change, but that concern has decoupled a little more for support for 2050 net-zero target.

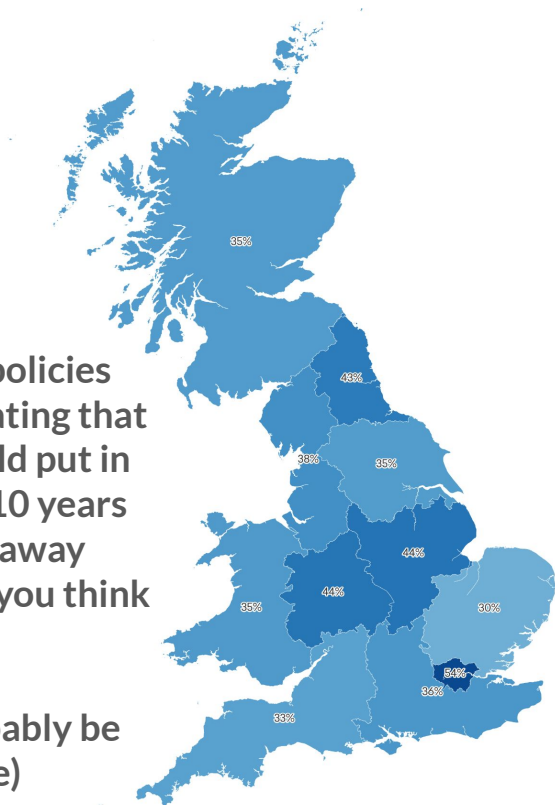
Since April last year, the proportion of people who say they are worried about climate change has fallen by eight percentage points, though a clear majority - around three in five - remain concerned. Over the same period, support for the 2050 target has dropped more sharply, falling by 16 points from 62 per cent to 46 per cent with particular growth in those who are neutral/unsure on the policy more than outright opposition.

There are also signs that concern about climate change is decoupling from support for net zero. In April 2024, 83 per cent of those worried about climate change supported the net-zero target. Today, that figure has fallen to 65 per cent.

Barrier Three - Fairness

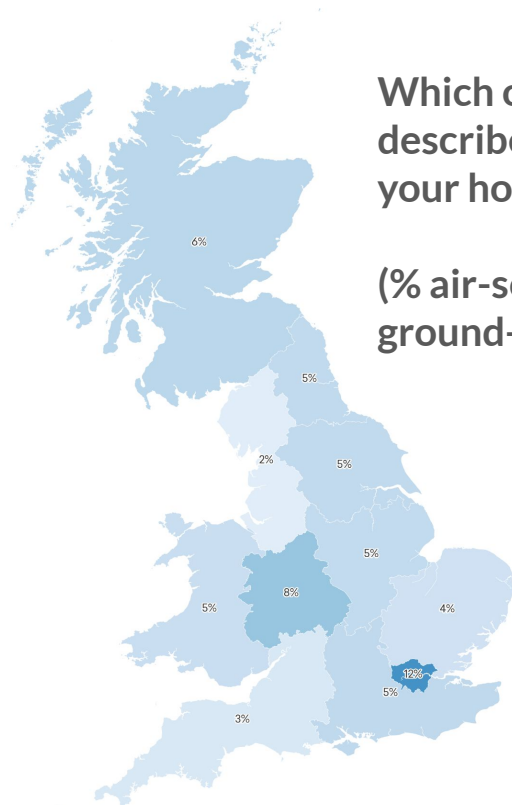
Thinking about the policies relating to home heating that the government could put in place over the next 10 years to aid the transition away from gas boilers, do you think they will...

(% definitely or probably be fair to people like me)



Which of the following best describes how you heat your home?

(% air-source or ground-source heat pump)



Rural, and less well-off Britons do not expect the energy transition to be fair to them, while richer, more urban Britons do.

Key Barrier Four - Sequencing

Thinking about the ways the government could invest in making our homes more energy efficient, which do you think they should be prioritising?

Rank	All	Own outright	Own with a mortgage or loan	Rent from the council	Rent from the housing association	Privately rent	Rent free
1	Wall and loft insulation 46%	Wall and loft insulation 47%	Wall and loft insulation 51%	Rooftop solar panels 45%	Rooftop solar panels 44%	Wall and loft insulation 42%	Rooftop solar panels 44%
2	Rooftop solar panels 43%	Double-glazing on windows 43%	Rooftop solar panels 45%	Double-glazing on windows 43%	Wall and loft insulation 43%	Rooftop solar panels 41%	Double-glazing on windows 41%
3	Double-glazing on windows 40%	Rooftop solar panels 42%	Double-glazing on windows 40%	Wall and loft insulation 42%	Double-glazing on windows 40%	Double-glazing on windows 36%	Wall and loft insulation 38%
4	More energy efficient gas boilers 33%	More energy efficient gas boilers 39%	More energy efficient gas boilers 33%	Replacing gas boilers with heat pumps 37%	Replacing gas boilers with heat pumps 35%	Replacing gas boilers with heat pumps 30%	More energy efficient gas boilers 24%
5	Replacing gas boilers with heat pumps 26%	Energy efficient appliances like refrigerators 22%	Replacing gas boilers with heat pumps 30%	More energy efficient gas boilers 31%	More energy efficient gas boilers 32%	More energy efficient gas boilers 28%	Replacing gas boilers with heat pumps 23%

The champions of renewable heating - Net Zero Dads

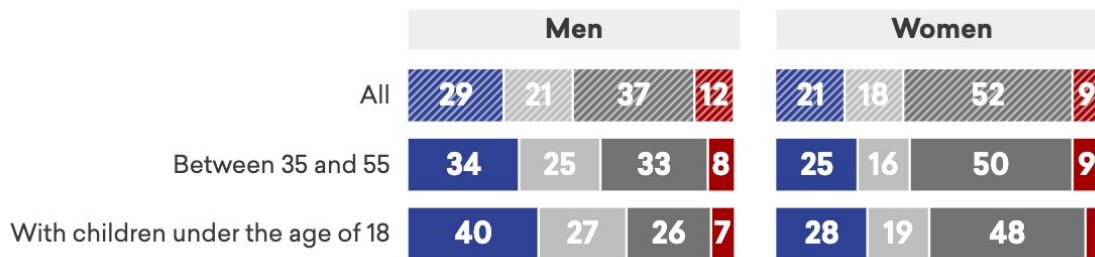
Dads are highly enthusiastic about green technology. When asked if installing a heat pump could lower energy bills, only 29% of Britons believed it would, yet for younger dads with children under 18 this rises to 40%.

Only 26% of this group said “don’t know” compared to 45% of the overall public - suggesting they’ve done their research.

Middle-aged men and dads are more supportive of heat pumps

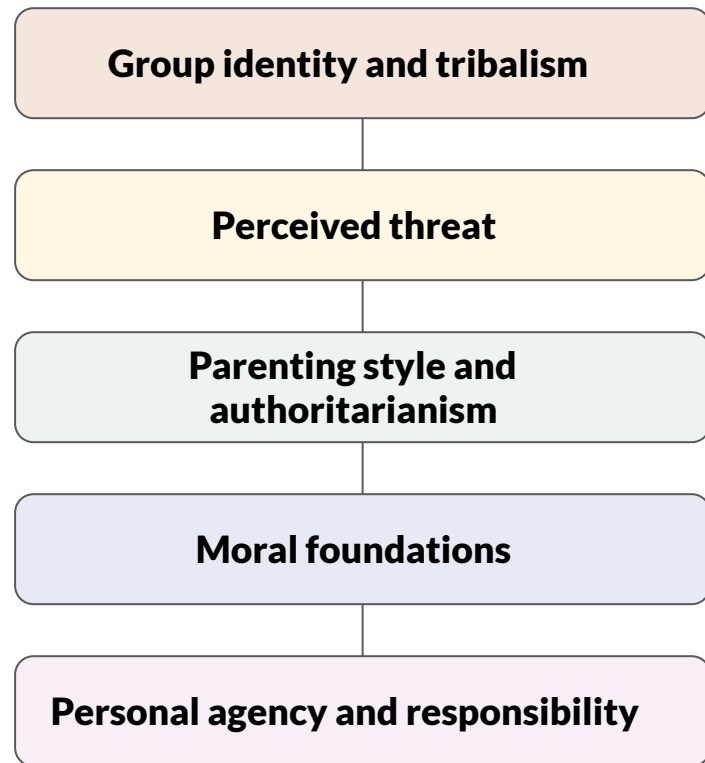
Which of the following comes closest to your view?

- A heat pump would make my energy bills cheaper in the long-run
- A heat pump would make no difference to my energy bills in the long-run
- Don't know
- A heat pump would make my energy bills more expensive in the long-run



Our unique lens - The British Seven Segments

- The 'British Seven' segments were formulated in our 'Shattered Britain' report, published in 2025
- They are created entirely from questions around areas of core beliefs, drawn from social psychology: group identity and tribalism, perceived threat, parenting style and authoritarianism, moral foundations, personal agency and responsibility
- No demographic information (race, class, or gender) is used for the segmentation, though the segments created by this process often have demographic differences
- Segmentation shows that values and beliefs are powerful in influencing how individuals form opinions about issues and their behaviour. Often, the segments are more predictive of beliefs than any other metric



Progressive Activists



Incrementalist Left



Established Liberals



Sceptical Scrollers



Rooted Patriots



Traditional Conservatives



Dissenting Disruptors



...an outspoken group that is politically engaged and globally minded, championing social justice but feeling alienated from mainstream politics

...a group that leans left and trusts institutions, often stepping back from the news and avoiding politically fraught debates

... a prosperous group that is confident in institutions, values expertise, and believes the system broadly works

...a disengaged group that has lost trust in mainstream institutions and increasingly looks online for sources of truth

...a patriotic group that feels overlooked by elites and wants leaders with common sense to protect local identity

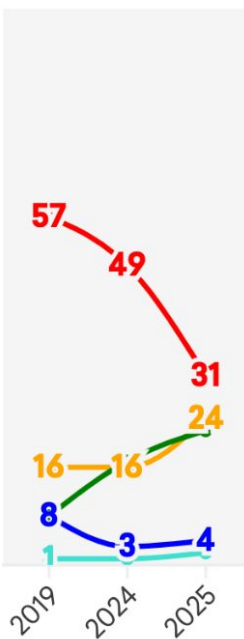
... a nostalgic group that respects tradition, authority and personal responsibility, while remaining sceptical of rapid change

... a frustrated group that craves radical change and backs strong leaders who promise to shake up a broken system

How would the seven segments vote?

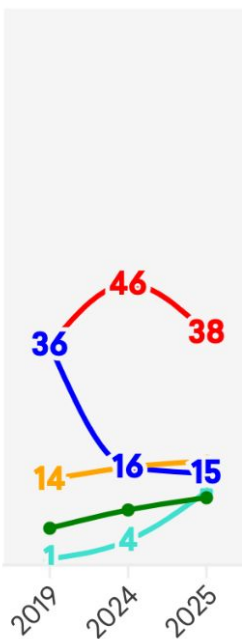
Progressive Activists

"Corbynites"



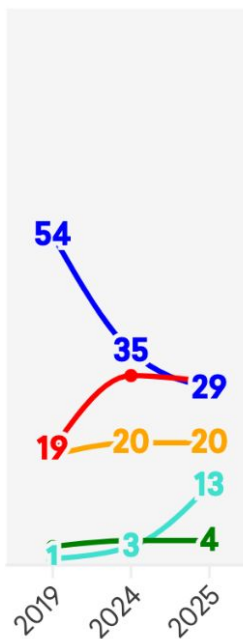
Incrementalist Left

"Social democrats"



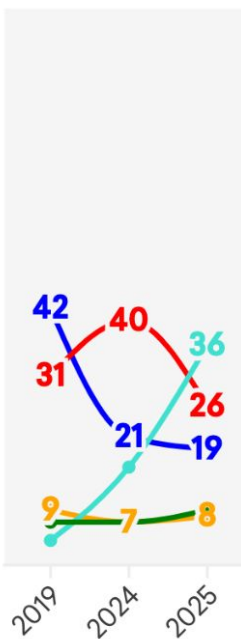
Established Liberals

"Blue Wall"



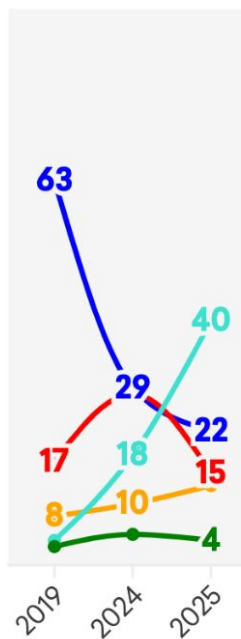
Sceptical Scrollers

"Online Disengaged"



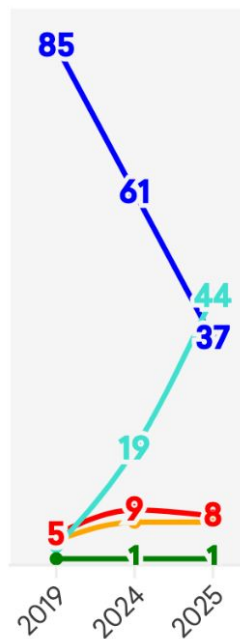
Rooted Patriots

"Red Wall"



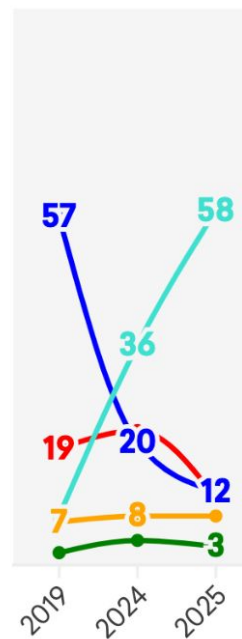
Traditional Conservatives

"Shire Tory"



Dissenting Disruptors

"Populist Right"



Labour's 2024 coalition

How the segments approach the energy transition



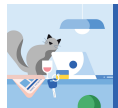
Progressive Activists

Care deeply about climate change and want it to be a priority
Celebrate progress on decarbonisation and how we can speed this up



Incrementalist Left

Support the energy transition, especially when it brings community benefits
Focus on the positive impact that the switch can have for neighbours and communities



Established Liberals

Are optimistic about renewable energy and technological innovation
Are much more likely than the public as a whole to own their home; enthusiastic about new technologies



Sceptical Scrollers

Want to hear from those already enjoying the benefits of technologies themselves
Are also the least likely to own their own home



Rooted Patriots

Want ambitious action from the government on climate change, especially when tied to finances
Show why making the transition to heat pumps make sense for them personally



Traditional Conservatives

The most resistant to change and rapid transitions of technology
Want government to show how progress that has already been made



Dissenting Disruptors

Think climate change is an important issue, but have strong concerns over fairness
They are concerned with the economic burden any transition will place on working people.



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Later today...



Things can only get hotter: Is ambition on climate and nature a route for electoral success?

 Tuesday, 30 September

 12:15 to 13:15

 Sherwood Arena Room, Secure Zone, ACC



Fiona Harvey
(Chair)
The Guardian



Luke Tryl
More in Common



Toby Perkins MP
Chair of Environmental Audit Committee



Luke Murphy MP
Member of Energy & Net Zero Committee



Angela Francis
WWF UK



What do we think of the speech? Expert analysis of the Prime Minister's speech

 Tuesday, 30 September

 17:30 to 18:30

 Sherwood Arena Room, Secure Zone, ACC



Luke Tryl
More in Common



Marc Stears
UCL Policy Lab



Josie Rourke
Writer & Playwright



Tom Baldwin
Author & Journalist



Rachel Sylvester
The Observer

More in Common at Labour Party Conference 2025

All events take place in the Sherwood Arena Room, ACC, unless indicated otherwise



Tuesday 30 September

Things can only get hotter: Is ambition on climate and nature a route for electoral success?

12:15PM-1:15PM

With Fiona Harvey, Luke Tryl, Toby Perkins MP, Luke Murphy MP and Angela Francis

What do we think of the speech? Expert analysis of the Prime Minister's speech to party conference

5:30PM-6:30PM

With Luke Tryl, Marc Stears, Josie Rourke, Tom Baldwin and Rachel Sylvester