

Headline Findings

Achieving Clean Power by 2030 and Net Zero by 2050 will require wide-scale behaviour change among domestic energy consumers. Ofgem's new Flexibility and Net Zero (FANZ) survey is providing essential evidence on consumers' attitudes and engagement with low carbon and flexibility products and services.

This summary report presents some of the key findings. Fieldwork was conducted in June 2025 with 4,385 domestic energy consumers from across Great Britain. It was delivered by Ipsos.

The full report can be accessed here:

www.ofgem.gov.uk/research/tracking-energy-consumers-use-low-carbon-and-flexible-products-and-services-2025



Most consumers say they want to use low carbon products and services



62% of consumers say they want to use products and services that reduce carbon emissions

Uptake of low carbon technology and services is likely to continue to increase in the next two years



5% say they are likely to adopt a heat pump in the next two years



14% say they are likely to adopt an EV in the next two years



17% say they are likely to switch to a Time of Use tariff in the next two years

There are several barriers to adoption of low carbon technology and services



Cost is reported as the **#1 barrier** to adopting EVs and heat pumps but other significant barriers remain



Barriers to heat pump adoption

43% Purchase price or running cost is too high

33% Would need to make additional home improvements

29% Hassle of installing a heat pump



Barriers to EV adoption

55% Purchase price is too high

32% Prefer a petrol/diesel/hybrid car

33% The range is not far enough



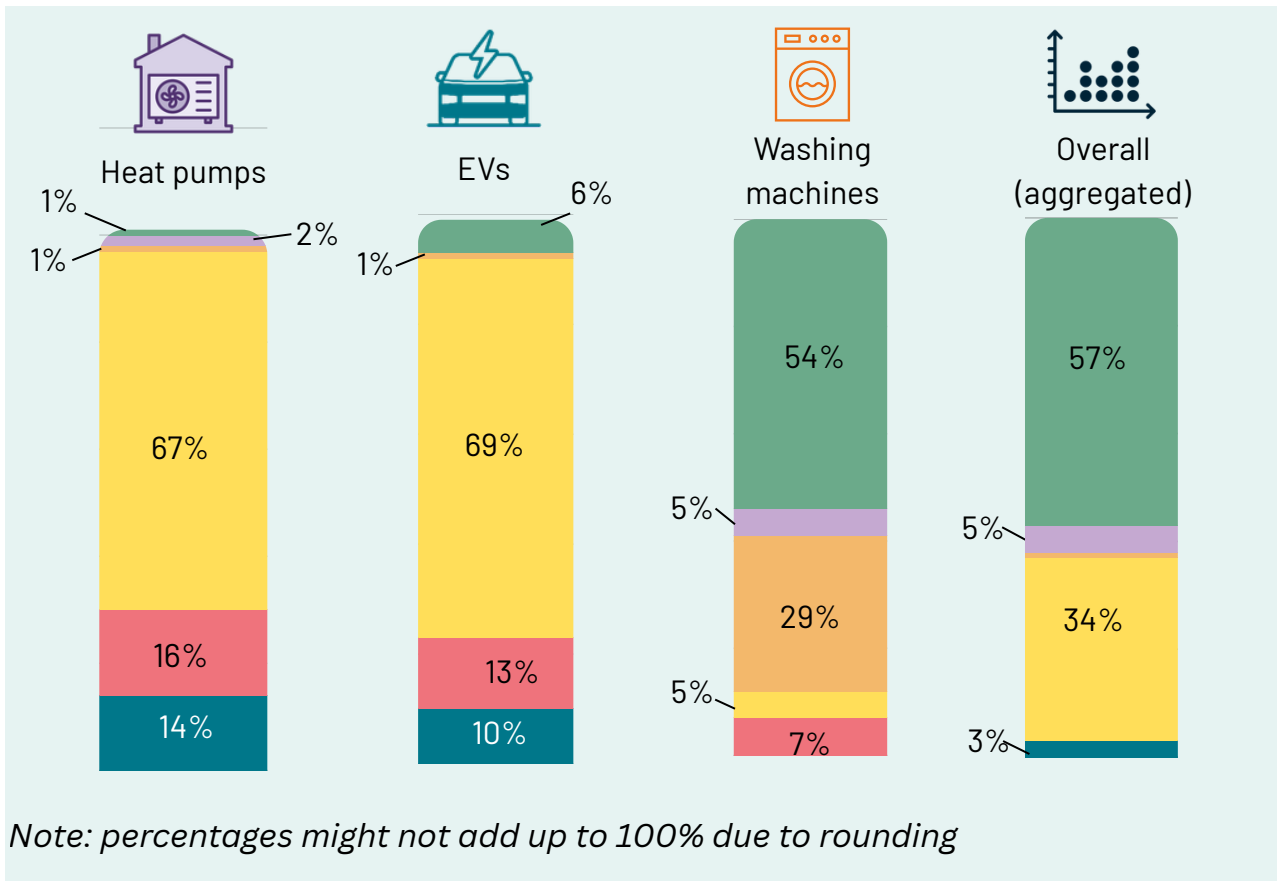
Barriers to Time of Use tariff switching

27% No guarantee it will save money

22% No particular reason/haven't thought about it before

21% Don't know enough/not heard before

Most EV users say they already exclusively charge off-peak, and laundry load-shifting shows potential, but heat pump flex is a challenge



Has technology

- Have technology and willing and able to flex
- Have technology, but not able/willing to flex to save money
- Have technology but willingness to flex unknown

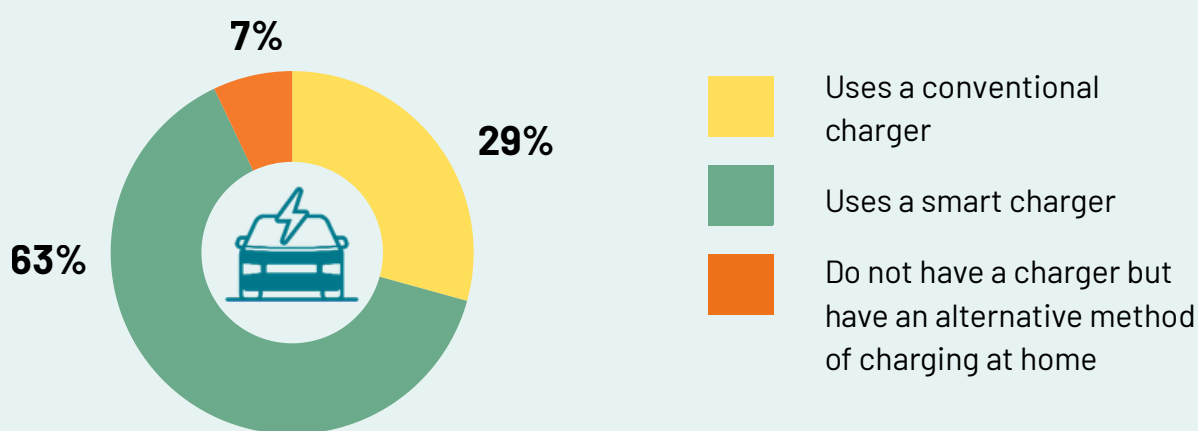
Does not have technology

- Does not have technology due to hard barriers¹
- Does not have technology and no hard barriers
- Does not have technology and barriers unassessed

¹ Hard barriers are broadly defined as structural, material constraints such as cost, infrastructure, and property limitations or simply barriers that would be difficult to change.

While EV smart charging is normalised, many consumers show low comfort levels with the idea of an external company managing their EV charging or heating controls, which could be a barrier to automation

Amongst EV users in Great Britain who charge at home...



72%

say they are uncomfortable with a third party controlling at home heating

These findings show that there is significant potential for all consumers to contribute towards the government's Clean Power and Net Zero targets. Ofgem will continue to monitor consumer engagement, to ensure everyone has the opportunity to take part, while making sure that all consumers are protected.