



# HEAT PUMP ADOPTION IN CORNWALL

Perceptions and barriers

Executive Summary

The Carbon Trust

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# AUTHORS

**Jack Adkins**

Research lead

[jack.adkins@carbontrust.com](mailto:jack.adkins@carbontrust.com)

**Anthony Dale**

Project manager

[anthony.dale@carbontrust.com](mailto:anthony.dale@carbontrust.com)

**Maddie Liver**

Research analyst

[maddie.liver@carbontrust.com](mailto:maddie.liver@carbontrust.com)

**Will Rivers**

Project director

[will.rivers@carbontrust.com](mailto:will.rivers@carbontrust.com)

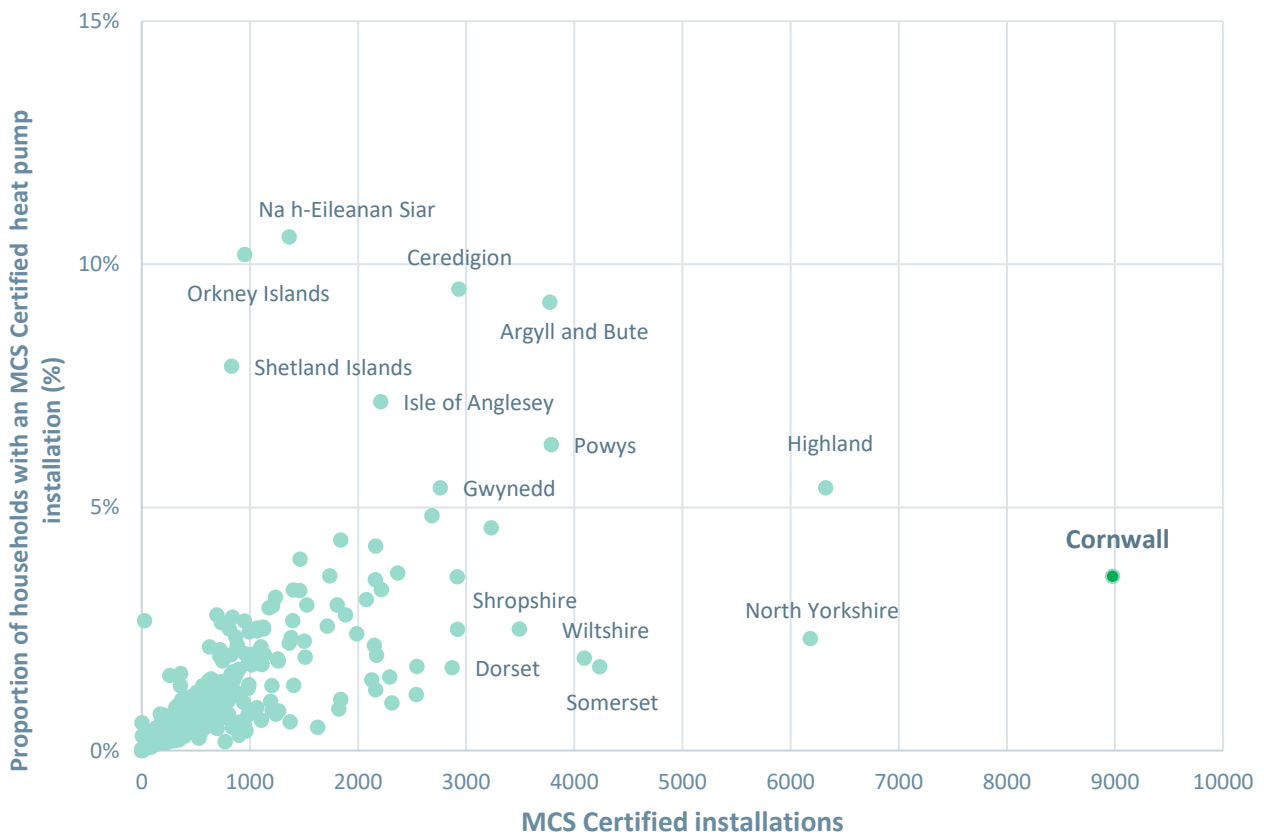
For more detail, please read the full report at [swnetzerohub.org.uk](https://swnetzerohub.org.uk)

# Executive Summary

Cornwall leads the UK in heat pump deployment. With nearly 9,000 domestic installations since 2014 (40% more than any other UK local authority) the transition to low-carbon heating in Cornwall is well underway. Cornwall Council's Housing Decarbonisation Strategy sets out an ambition for all homes to transition to low-carbon heating by 2045, with heat pumps as the primary solution.

However, Cornwall Council and the South West Net Zero Hub identified that negative feedback about some installations, and a slowdown in deployment by some housing associations could threaten to slow Cornwall's momentum with heat pump deployment. In August 2025, the Carbon Trust was appointed to undertake this study to establish the views and perceived barriers to heat pump deployment across all tenure types, assess the evidence for each, and identify opportunities to build confidence in heat pump deployment and accelerate deployment.

Figure 1: MCS certified heat pump installations by local authority (Source: MCS)



# What we did

The primary evidence came from 21 semi-structured interviews with stakeholders from across Cornwall's heat pump deployment ecosystem, including social housing providers, installers, training providers, Cornwall Council teams, community organisations, energy infrastructure representatives, and policy experts. We also analysed MCS installation data for Cornwall from 2014 to mid-2025, and conducted a targeted literature review drawing on national surveys, government research, and market intelligence.

# What we found

We identified 12 perceived barriers to heat pump deployment in Cornwall. The table below summarises each, grouped by criticality. A consistent thread across all interviews was that the most serious problems stem not from the technology itself but from how installations are designed, specified, and handed over.

*Table 1: Perceived barriers to heat pump adoption in Cornwall, rated by criticality (Source: 21 stakeholder interviews)*

<b>TIER 1: Critical</b>	<b>TIER 2: Significant</b>	<b>TIER 3: Context-specific</b>
High upfront costs	ECO/SHDF funding complexity and supply chain inefficiencies	Maintenance, servicing and warranty concerns
Poor installation quality and system design – the root cause of many other barriers	Stop-start policy and funding uncertainty	Misinformation and negative media narratives
High running costs	Uneven installer skills and training	Grid capacity and DNO connection processes
Gaps in customer education and handover	Concerns about older housing stock suitability	Coastal corrosion

# What we recommended

Progress in addressing these perceptions and barriers will require coordinated effort across the whole ecosystem of stakeholders in Cornwall, with the Cornwall and Isles of Scilly Local Area Energy Plan providing the strategic framework. Our key recommendations are:

1. **Build a regional consensus on heat pump best practice**, establishing a shared standard for system design, installation, commissioning and operation.
2. **Maximise the impact of Warm Homes funding** by embedding quality and local accountability into current programmes, and positioning Cornwall for integrated funding rounds from 2028.
3. **Reframe the economic case for owner-occupiers**, presenting whole-home costs and savings in tenure-specific terms, particularly for off-gas households.
4. **Ensure heat pump users get the most from their systems** by coordinating consistent guidance across installers, social landlords, community organisations and advice services.
5. **Drive consistent quality in installations**, with all procuring organisations adopting strengthened specifications and using performance accountability tools.
6. **Develop the supply chain, skills and training** through a coordinated strategy that addresses geographic gaps and creates upskilling pathways for experienced tradespeople.
7. **Develop heat pump transition plans for social housing**, aligning asset management with emerging MEES timelines and investing in tenant engagement.
8. **Accelerate deployment in the private rented sector**, using forthcoming MEES tightening as a compliance driver, supported by dedicated PRS advice through the Cornwall Retrofit Hub.

## Next steps

These findings and recommendations were presented to Cornwall Council and the South West Net Zero Hub in March 2025. The full report at [swnetzerohub.org.uk](https://swnetzerohub.org.uk) provides a detailed evidence base to support heat pump deployment in Cornwall and inform next steps.

We anticipate that these recommendations will be taken forward through coordinated action, with Cornwall and Isles of Scilly Local Area Energy Plan providing the broader governance framework for coordinating action across the County. The Cornwall Housing Decarbonisation Partnership Working Group also provides a forum for coordinating action across social housing, advice, skills and policy stakeholders.