Watt Communities Want:

Six Insights into UK Public Opinion on Energy

A research report commissioned by eleven leading UK energy trade associations:

Heat Networks Demand ade | beama | Carbon Capture & Storage Association | Energy UK | Hydrogen UK

HPA UK | NIA Nuclear Industry Association | REA | RenewableUK | scottish renewables | Solar Energy UK

Undertaken by Early Studies | Social Circle Surveying and Triple Tense Technique

June 2026

SIX INSIGHTS

This survey asks people what they think their friends, family, and other people around them believe. The results below show these perceptions, not necessarily the actual views of those people. When the survey shows trends over time, it compares people's current impressions of what those views were in the past and what they might be in the future, rather than using real data collected in previous years. More about the methodology on page 6.

1 People know clean energy makes the UK more secure

Energy security is national security. Across all political voting intentions, most people think clean energy makes the UK more energy secure. This is true for nearly two-thirds of the public (63%), nearly doubling since 2020 (36%, Q2). The number of people who consider energy security and reducing reliance on imports to be most important when thinking about the UK's energy future has doubled from 18% in 2020 to 41% today (Q3).

2 Energy bills remain the top concern, but voters support the need to spread infrastructure costs over many years

People understand that world events affect their energy bills (Q4) and assume they rise and don't go back down as a consequence. Faced with five priorities for the UK's energy future, ensuring energy bills are as low as possible is unequivocally the top priority (Q3). However, when asked about the fairest way to pay for critical energy infrastructure, spreading infrastructure costs over many years is the majority preference at 50%, up from 37% in 2020, ahead of keeping bills low now, which has fallen from 37% in 2020 to 28% (Q1). The preference for spreading costs holds across every political voting intention.

3 Climate change and reducing air pollution still matter

Energy bills remain front and centre of people's minds when they are asked to think about the country's future energy system (72%), followed by ensuring energy security which now ranks second of five options (41%). However, fighting climate change ranks third overall in 2026 (39%, Q3). Interestingly, people think that fighting climate change will increase in relevance in the future (49%), ranking above energy security (44%) as what matters to them most. Of the seven options around our future energy needs (Q7), reducing air pollution ranked second in the national sample in 2026 (37%) and rose to be the top concern in 2030 (42%) although this varies by political affiliation.

4 The public will back a flexible, storage-led system

57% favour storing excess renewable power when the grid has surplus, and only 4% would prefer to fall back on fossil fuels (Q6), which has halved since 2020 and remains low in 2030. People see the need for grid upgrades, backed by 46%, whilst support for smart technology has more than doubled from 15% in 2020 to 32% in 2026 (Q6). Knowledge of the energy system has risen sharply, and the share who say they don't know enough about grid constraints has almost halved since 2020. Although most people recognise that the energy transition is around moving to clean power (69%, Q9), very few associate it with electrifying heat and transport (14%), which remain the two biggest areas to tackle. Although there is an expectation that people will associate the energy transition more with heat and transport in the future (22%).

5 Clean energy is now an industrial story

When asked about future priorities, UK industrial competitiveness is the fastest-rising of seven options (Q7) at 39%. Belief in national job creation from the energy transition has risen from 31% to 42% (Q5). However, around one in five still see no local economic benefit from clean energy, and over a quarter think job creation is exaggerated, a perception gap that will close only if faced with local, tangible evidence of investment, careers and skills provided by the clean energy sector – underlying the importance of the right steps for the energy transition to the wider economy.

6 Confusion remains around the reality of today's energy system

The way energy is produced, bought and sold is incredibly complex and the polling highlights a clear need for better communications and understanding. This is true across many areas from energy bills to clean power. The average (median) public estimate of energy supplier profit is that it accounts for 40% of their energy bill (Q12) – compared to the actual maximum of around 2.5% in the price cap set by the regulator. The public also underestimates how clean Great Britain's electricity already is, with an average estimate (median) of 40% (Q11) when clean energy actually provides over 50% of our electricity needs. Only 23% identify the accurate description of the current UK Government's Clean Power 2030 target which includes some gas on the system in 2030 (Q10), with many confusing the term with 100% renewable energy generation. Contrary to many media narratives, visual impact is the lowest-ranked of the seven options for future energy priorities (Q7), standing at just 11%, a figure that remains low across every age group and political party.

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EXECUTIVE SUMMARY

This report presents the findings of a nationally indicative survey of 996 UK adults, including respondents in England, Scotland, Wales and Northern Ireland across all political voting affiliations.

The polling was commissioned by eleven leading energy trade bodies, and the research was conducted by Early Studies using Social Circle Surveying and Triple Tense Technique. Respondents were asked twelve questions about energy infrastructure and the energy transition, each answered across three time perspectives: recalled 2020, current 2026, and projected 2030. The findings describe how communities understand the direction of travel, not only where opinion sits today.

The headline is that most people understand the link between clean power and better energy security, between international events and energy bills, and most still prioritise tackling climate change. The public backs long-term infrastructure investment, and wants costs spread fairly, preferring this to paying less now if that incurs costs later on. People recognise storage and flexibility as essential, back grid upgrades and, in general, are more system-literate, more engaged, and more willing to support the transition than the industry conversation typically assumes.

Six strategic insights emerge from the data. First, most people associate clean power with improved security, both in terms of energy supply and dependence on international supply chains. Second, whilst lowering energy bills is a priority, the public is asking for investment rather than delay; the preference for spreading costs over many years now leads by some way across every political persuasion. Third, whilst the cost of energy and energy security remain the top concerns, there is still strong support for tackling climate change and reducing air pollution. Fourth, there is majority support for a flexible, storage-led system to accommodate the variable output from renewables – grid upgrades, storage and smart technology to shift when we use power, with only 4% of the public willing to fall back on fossil fuels. Fifth, clean energy is increasingly seen as supporting the country's jobs and industrial strategy, with UK industrial competitiveness the fastest-rising of the seven options set out in Q7. Sixth whilst there is support for, and increasing understanding of the energy sector's transition, there is a need to improve communications to correct misperceptions about the energy system and its costs.

The profit misperception is the most significant within the results. The public estimate of supplier profit sits around sixteen times above the actual level, and it has not moved at all in five years, unlike every other knowledge gap in this dataset. The average estimate (median) sits at 40% in 2020, 40% today, and 40% projected for 2030. Correcting it is the prerequisite for the rest of the communications agenda, not an addition to it. People have valid and understandable questions about why energy bills are so high, and the sector needs to do a better job in communicating the facts.

This is not limited to cost. The public also underestimates how much of Great Britain's electricity is already generated from clean sources, with an average estimate of 40% that is short of the reality (55% renewables and nuclear). Only 23% of the public identify the accurate description of what the current UK Government's Clean Power 2030 target actually means – mostly clean generation with some fossil fuel back up – 36% believe it means 100% renewable generation. And visual impact – routinely treated in planning debates as a dominant community concern – sits at 11% nationally, the lowest-ranked of seven Q8 options, and this is consistent across every age group and political party. On visual impact in particular, the data is a direct counterweight to a framing that has dominated planning objections.

There is public support for action to decarbonise power, tackle climate change and improve energy security. What's missing is an understanding of how this will practically be achieved – what is actually happening, what the impact will be and what the trade offs are. There are also a number of deep rooted assumptions about the energy industry, and confusion about what the energy transition will mean for households and businesses.

Report structure. Section 2 sets out the methodology, including Social Circle Surveying, the Triple Tense Technique, and the multi-select survey design. Section 3 presents the six insights in detail, each with statistics and implications for the energy transition story, public-facing messaging, and decision makers. Section 4 consolidates the conclusions. Section 5 presents the full data from 12 questions, with cross-tabulations by gender, age, and political affiliation.

METHODOLOGY

Social Circle Surveying

Most polling asks people what they think. Social Circle Surveying asks them something different: what do the people around you think? Your family, your friends, your colleagues. It's a small shift in wording, but it changes what comes back.

Asking someone directly about a complex policy topic puts them on the spot. They generate an answer in the moment, often influenced by what they think sounds reasonable, or by what they feel they should say. Asking them about their social circle takes that pressure off. They are not being judged; they are reporting on what they have picked up around them. What comes back is something more durable: the ambient beliefs actually circulating in households, workplaces, and communities.

The method also picks up things direct polling misses. People often hold back views they sense are unpopular, and communities can end up with a shared but mistaken impression of what everyone else believes.

The approach draws on a growing body of research on how people read their social environments. Asking about social circles produced more accurate predictions of the 2016 US and 2017 French presidential elections than conventional own-intention polling (Galesic et al., 2018). People turn out to be reasonably good observers of those around them, picking up on hints, disagreements, and offhand comments that do not surface in a standard yes/no question.

A note on how we report the findings. Throughout this report, results are written a direct form – "63% of the public believe clean energy makes the UK more secure" – rather than "63% of respondents believe people in their social circle believe clean energy makes the UK more secure". This is deliberate. Because respondents can report multiple views present in their circle, the aggregate across a representative sample captures the prevalence of each view in the population rather than the single majority view of each respondent. In a representative sample, the share of social circles in which a view is detectable is a reliable proxy for the share of the population holding it. The direct form is readable and accurate; the social circle frame is the route to the finding, and the finding itself is about the public.

The Triple Tense Technique

Questions in this survey were asked across three time perspectives: what do people in your social circle think now, what did they think in 2020, and what do you expect them to think in 2030?

The 2020 results are not based on previous surveys. The 2026 figure is the current one. It is the only point at which respondents are describing what they observe today. The 2020 and 2030 figures are projections from 2026 – the respondent's best reconstruction of what their circle used to believe, and their best estimate of where belief is heading.

A single snapshot tells you where opinion sits. A triple snapshot turns it into a trend line: how fast belief is moving, and whether the public themselves think the direction of travel is stable or about to reverse. The retrospective figures should be read as directional rather than precise; people reconstruct the past in light of the present. The forward projections capture where respondents expect opinion to be heading, not a forecast of where it will land. What matters is the shape of the arc.

Why multiple select?

Most questions in this survey were multi-select. Respondents could tick more than one option, which is why the percentages in this report do not add up to 100.

This is deliberate. Respondents are not reporting their own single view; they are reporting what they observe across the people around them, and social circles hold a range of views. On a question about energy bills, one respondent might genuinely know people who want the cheapest possible bill now, and people who would rather pay more upfront for long-term stability. Both views are present in their network at once. Multi-select lets them report that accurately, rather than forcing them to pick one.

Questions 11 and 12, which ask for a single numerical estimate (proportions of an energy bill, percentages of the electricity system), use a single-answer format, and the average figure presented is the median.

Sample

The sample comprised 996 UK adults, with fieldwork conducted between 23 March and 20 April 2026 via Prolific, a research panel provider.

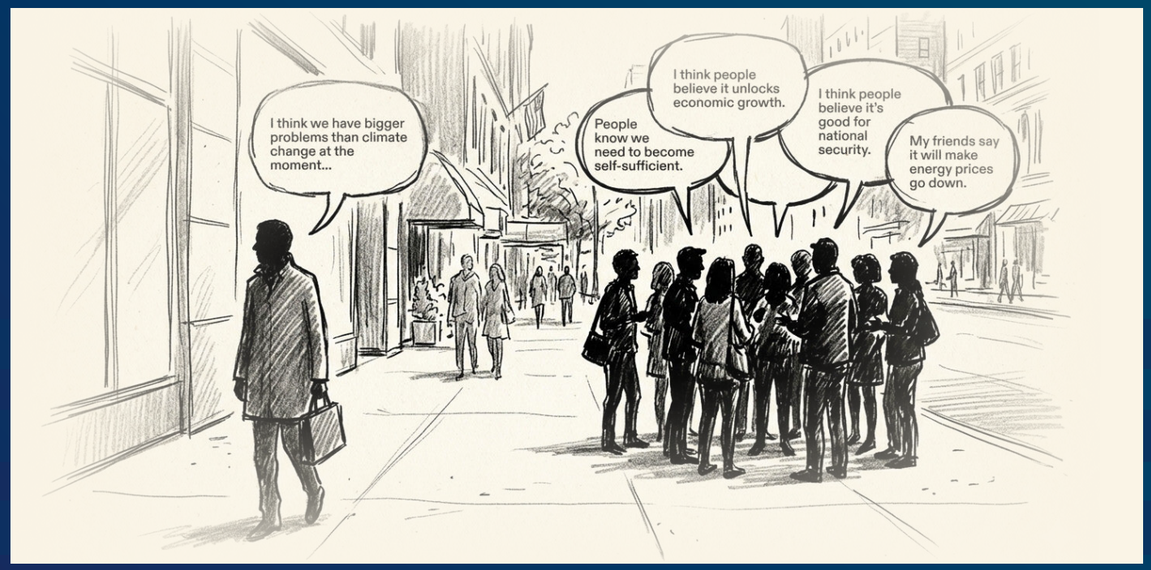
- **Gender:** 476 men, 516 women, 4 other.
- **Age:** 18–24 (105), 25–34 (167), 35–44 (169), 45–54 (166), 55–64 (261), 65+ (128).
- **Party:** Labour (240), Conservative (166), Liberal Democrat (113), Reform UK (141), Green (166), Other (133).

Prolific maintains a pool of pre-screened participants who have signed up to take part in academic and commercial research in exchange for payment. When a study is launched, the platform draws from that pool using demographic filters – age, gender, region, and in this case political affiliation – to assemble a sample that matches the desired national profile. Participants complete the survey remotely, typically via a phone or a laptop, and are paid per completed response. The approach is now standard for UK social research and is widely used by universities, government departments, and polling organisations. Respondents were from across the UK including Northern Ireland. This report largely refers to the UK Government's energy policy, although in some instances policies affect Great Britain only.

Percentages in this report have been rounded to the nearest whole figure. For the full data, see the appendix. What follows draws on the findings but presents them in strategic rather than survey-question form.

Further reading on social circle surveying:

- **Ahlstrom-Vij** *(2022), Electoral Studies***.** Shows through simulation that the accuracy advantage of social-circle surveys is robust across realistic sources of bias.
- **Galesic et al.** *(2018), Nature Human Behaviour***.** The headline paper showing that asking about social circles improved election predictions over standard polling.
- **Galesic et al.** *(2021), Nature***.** A broader argument for "human social sensing" as an under-used research tool.
- **Galesic, Olsson and Rieskamp** *(2012), Psychological Science***.** Explains why small samples of known others shape how people judge their wider social world.
- **Tourangeau, Rips and Rasinski** *(2000), The Psychology of Survey Response***.** On how respondents construct answers to survey questions, and why those answers can shift.



INSIGHTS

1 | People know clean energy makes the country more secure

Finding

Public attitudes have shifted. Clean power is now understood, by most of the country, as a way to make the UK safer and less exposed to global shocks, volatile international markets, and energy imports (Q2). However people feel about the environment or climate change, the security argument is well understood by the public. The majority view cuts across age bands and political affiliations, including voters traditionally assumed to be sceptical of clean energy, and reflects direct experience of recent global events, from the 2022 gas crisis to the Strait of Hormuz disruption that coincided with this survey's fieldwork.

The results also show that people care more about energy priorities than they used to (Q3), and more people are thinking about clean energy infrastructure in security terms (Q2), both rising significantly since 2020.

When asked what people understand by the words energy transition (Q9), the most popular explanation by some way was 'moving away from fossil fuels to clean energy' (69%). Reducing dependence on imported gas and oil ranked second at 28%, just ahead of reaching net zero carbon emissions (27%). Interestingly, making sure we have enough energy in the future is relatively low, at below 14% for 2020 and 2026, but jumps to 26% in 2030, reflecting how people think this may become more important in time.

The strategic consequence is significant. When the solution to an energy-security problem is domestic clean power, any voter can take a climate-positive position without it reading as overly ideological. Energy security makes support for a clean energy transition a politically safer position to hold, and that is the permission slip the transition needs from parts of the electorate that would not grant consent on climate grounds alone.

The reality

In an increasingly unstable global environment, it's important our country can satisfy its own energy needs. This means reducing our reliance on imported oil and gas and moving towards electrification of heat and transport, whilst continuing to decarbonise the power we use. The UK has already reduced emissions from the power sector by over 80% since 1990, and the UK Government's ambition is for clean sources to produce at least 95% of the country's generation by 2030, recognising the need for some gas alongside other forms of flexibility for the cheapest, most secure grid.

Clean power coupled with electrification of heat and transport makes our country more secure, and less reliant on other countries for the energy that powers our lives.

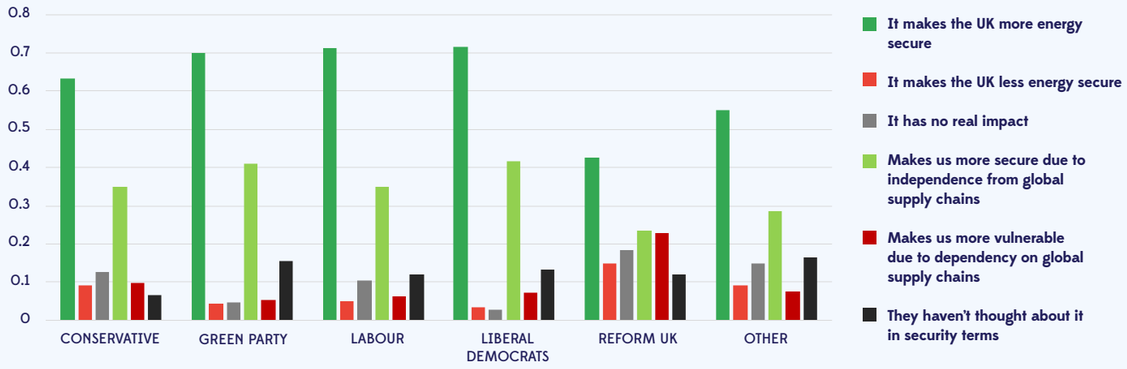
In Winter 2025/26, NESO (National Energy System Operator) said the grid was more secure than it's ever been (NESO, 2025). This is despite having more renewable generation connected than ever before.

Renewable output is variable and dependent on the weather, but with the right mix of generation, flexibility, and storage tools, the grid is more secure with multiple decentralised sources which aren't reliant on other countries.

Supporting statistics

- Almost two thirds of the public (63%) believe clean energy makes the UK more energy secure, up from 36% in 2020 (Q2).
- Across all political voting intentions, the majority agreed that clean energy makes the UK more energy secure compared to less secure, or not having an impact; Liberal Democrat 72%, Labour 71%, Green Party 70%, Conservative 63%, Other 55%, Reform UK 43%.
- Less than 10% in 2026 believe clean energy makes the UK less energy secure (Q2).
- The share of those who haven't thought about clean energy in security terms has dropped from 27% in 2020 to 13% in 2026.
- More people think that clean energy makes Great Britain more secure in consideration of global supply chains (34% more secure, 9% more vulnerable), and this holds true across every political persuasion, albeit the margins vary.
- The share of those prioritising energy security and reducing imports has more than doubled, from 18% in 2020 to 41% today (Q3).

Q2 What impact do people in your social circle believe clean energy infrastructure like wind, solar, biomass, nuclear, carbon capture and storage and hydrogen, has on our ability to provide our own energy, in an increasingly unstable international environment?



Implications

The energy transition story

Continue to make the link between energy security and national security, and emphasise the role of clean energy in reducing reliance on other countries. The current spikes and fluctuations in the gas price demonstrate the need for stable and reliable, homegrown energy sources that won't run out. More control and protection from global volatility are messages that work across all political voting intentions.

Public-facing message

Clean energy is energy security. More British-made power reduces our exposure to the impacts of conflicts happening elsewhere. Every wind turbine, battery, solar panel, heat pump, and nuclear reactor is national infrastructure that makes the country less dependent on volatile global markets.

Decision makers

Treat clean power investment as national infrastructure with the same strategic logic as defence spending, and continue the electrification of the economy (clean heat, electric vehicles, industrial processes) with energy security as the primary political rationale. A more demand-led decentralised energy system increases security from a small number of generation assets. Address concerns around supply chain vulnerability by promoting UK supply chain investment and growth.

However, the price of electricity is currently around four times the price of gas on household bills. It varies for businesses but it can be as much as six times more – more on this in Insight 5. If we really want people and businesses to move to electric heating, transport and processes, the price of electricity has to be attractive. Reducing the number, and total cost, of various levies on the electricity portion of energy bills has to be a priority for any government.

2 Energy bills remain the top concern, but voters support the need to spread infrastructure costs over many years

Finding

Energy bills are the dominant public worry, and the worry has deepened. The share of the public who rank low bills as a top priority for the UK's energy future has risen from 60% in 2020 to 72% today (Q3) and is consistently top across all political voting intentions and ages. What has changed alongside it is the public's answer to how to respond to rising energy bills. Preferences have shifted from short-term relief toward long-term investment.

In 2020, the preferences for "spread the costs evenly over many years" (37%) and "keep bills lower now even if it costs more later" (37%) were effectively tied (Q1). Today, spreading costs leads by 22 points – 50% against 28%. There is no partisan split, with voters from all parties backing spreading costs over time, within roughly five points of one another (Q1). The public is asking for a fairly spread investment, not for delay, and the ask cuts across the political spectrum.

The context matters. More people understand there is a link between energy bills and international events, and 70% of the public now believe international events push bills up permanently, up 22 points from 2020 (Q4). The public is operating on the working assumption that bills will not come back down on their own, and that assumption has strengthened across every party: Green voters hold it most strongly at 76%, with Other, Reform UK and Liberal Democrat at 71%, Conservative and Labour at 66% (Q4).

The reality

Energy bills are much higher than they were before the 'gas price crisis' which was made worse after the Russian invasion of Ukraine in 2022. According to the UK Energy Research Centre (UK ERC, 2025), as a consequence of recent conflicts abroad, gas has been the biggest driver of recent energy bill rises (approximately 2/3 of bill increases between 2021 and 2025 has been due to the wholesale cost of gas). This is because the price of gas is influenced by international markets, and gas sets the price of some UK electricity generation for a high percentage of the time.

The only way to avoid the impacts of future price shocks is to build up resilience by transforming the way we generate and use energy, which means using mainly clean sources for power, with some gas for flexibility, and moving away from gas for heating and cooking, to electric technologies.

Gas currently plays a crucial role in our energy mix. There will be a need for gas for many decades to come as part of the country's future energy system, but protecting billpayers and our economy from international events means reducing reliance on fossil fuels, for energy as well as for heating and transport.

Developing more clean power is part of the solution; wind power has already reduced the wholesale price of electricity by nearly a third (Energy & Climate Intelligence Unit, 2026), and recent analysis from Carbon Brief showed that the UK has avoided the need for gas imports worth £1.7 billion since the start of the Iran war, as a result of record electricity generation from wind and solar (Carbon Brief, 2026).

Whilst the wholesale cost may have reduced thanks to wind power, the overall energy bill has not. This is because there are other costs which are paid for by energy bills. These costs include support for new technologies, which means they will receive a fixed amount per unit of energy generated, and therefore are not exposed to international volatility, as well as strengthening our grid and electricity networks, a big investment which would have been needed regardless of Net Zero.

Investing in clean power, strengthening the grid and building a modern, flexible system is essential for our future energy security, but the financial benefits won't be felt for some time. Often the direct immediate is in protection from global price spikes, or a reduction in energy bills compared to what they would have been, both of which are hard to tangibly demonstrate.

Analysis from E3G and ECIU showed that the total direct cost faced by the UK economy as a result of the global spike in energy prices which began in 2021 was £183 billion (in 2024 prices), excluding taxes. This is more than the £177 billion that NHS England spent on health services in 2024/25 (E3G, ECIU, 2025).

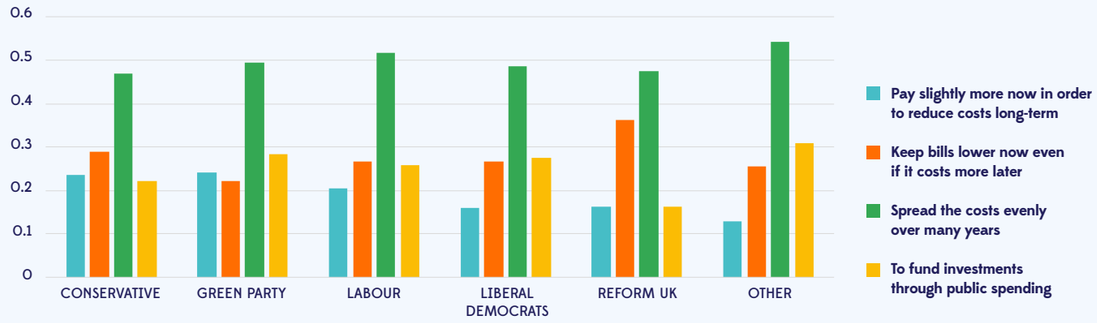
It is also worth looking at the cost of what clean power protects against. A single fossil fuel shock costs the economy more than the entire investment required to reach Net Zero (Climate Change Committee, 2026). The majority of investment will come from the private sector. Some companies are investing the equivalent of millions of pounds every day in building critical infrastructure that will last for decades to come.

The way we heat our homes and buildings also needs to change to bring down bills. The UK uses more gas for heating than other countries which have already moved to electric technologies, and there is a lot of wasted energy due to poorly insulated buildings. Some industrial heat could be harnessed, for example from data centres.

Supporting statistics

- Ensuring energy bills are as low as possible has risen from 60% in 2020 to 72% today, and remains the top priority for the UK's energy future across all political voting affiliations, past, present and future (Q3).
- 70% of the public believe that international events push energy bills up permanently (Q4). The share of those who don't think about how world events affect their bills has dropped from 17% in 2020 to 5% in 2026 (Q4).
- When asked about the fairest way to approach paying for critical infrastructure, spreading infrastructure costs over time is the majority preference at 50%, ahead of keeping energy bills low now even if it costs more later at 28% (Q1).
- In fact, the share of those who prefer keeping energy bills lower now, even if it costs more later, has fallen from 37% in 2020 to 28% in 2026 (Q1).
- When asked to rank against three other options, the preference for spreading costs holds across every political party: Labour 52%, Liberal Democrat 49%, Green 49%, Reform UK 48%, Conservative 47% (Q1).
- Approximately two thirds of energy bill increases between 2021 and 2025 was due to the wholesale cost of gas (UK ERC, 2025).
- Wind power has already reduced the wholesale price of electricity by nearly a third (ECIU, 2026).
- Since the start of the Iran war, the UK has avoided the need for gas imports worth £1.7 billion as a result of record electricity generation from wind and solar (Carbon Brief, 2026).
- The total direct cost faced by the UK economy as a result of the global spike in energy prices which began in 2021 is £183 billion (in 2024 prices), excluding taxes; more than the £177 billion that NHS England spent on health services in 2024/25. (E3G, ECIU, 2025).
- A single fossil fuel shock costs the economy more than the entire investment required to reach Net Zero (CCC, 2026).

Q1 When it comes to critical energy infrastructure investment, in addition to private sector investment, what do people in your social circle think is the fairest approach?



Implications

The energy transition story
Lower energy bills are the sector's licence to operate, and it's important to consider the impacts of high energy bills on people and businesses. Whether talking to the public, politicians or the media, acknowledging that energy bills are both higher than they were, and higher than other countries is essential. This is what the public cares about the most. What is crucial is then explaining why:

- There is a clear correlation between when energy bills started to rise and international conflicts.
- Whilst there are other costs on energy bills, some of which have increased, gas has, by far, been the biggest driver of energy bill increases.
- The other costs are investments that will help reduce our reliance on gas in the long term.
- Gas is required to meet the nation's electricity demand, meaning it sets the price the majority of the time. That price can be volatile and influenced by events beyond our control.
- Therefore, we need to invest in homegrown sources of power, reducing our reliance on gas for heating and cooking, and move to electric technologies; clean British power is already helping to lower wholesale costs.
- This will reduce our exposure and insulate us from what is happening elsewhere in the world.

Frame clean energy investment as insurance – insurance against the bill increases which 70% of the public now expect to stay permanent – and protection against volatile prices beyond our control and future shocks. It's important to make the link clear between investment now, paying fairly and protections from volatility in bills. Investment is the answer the public is already giving; the sector's job is to meet that answer, not talk the public into it. It's important to stress that most of the investment will come from the private sector, and that no party's voters back the "put investment off" framing.

Whilst communications should make clear that the main driver for energy bill increases has been the wholesale cost of gas, it is important to be upfront about other costs on the energy bill, including support for clean technologies and strengthening the grid. Pointing these out and actively explaining what they are, the reason they are needed and how else they could be paid for, are all essential to improving trust and having real conversations with the public.

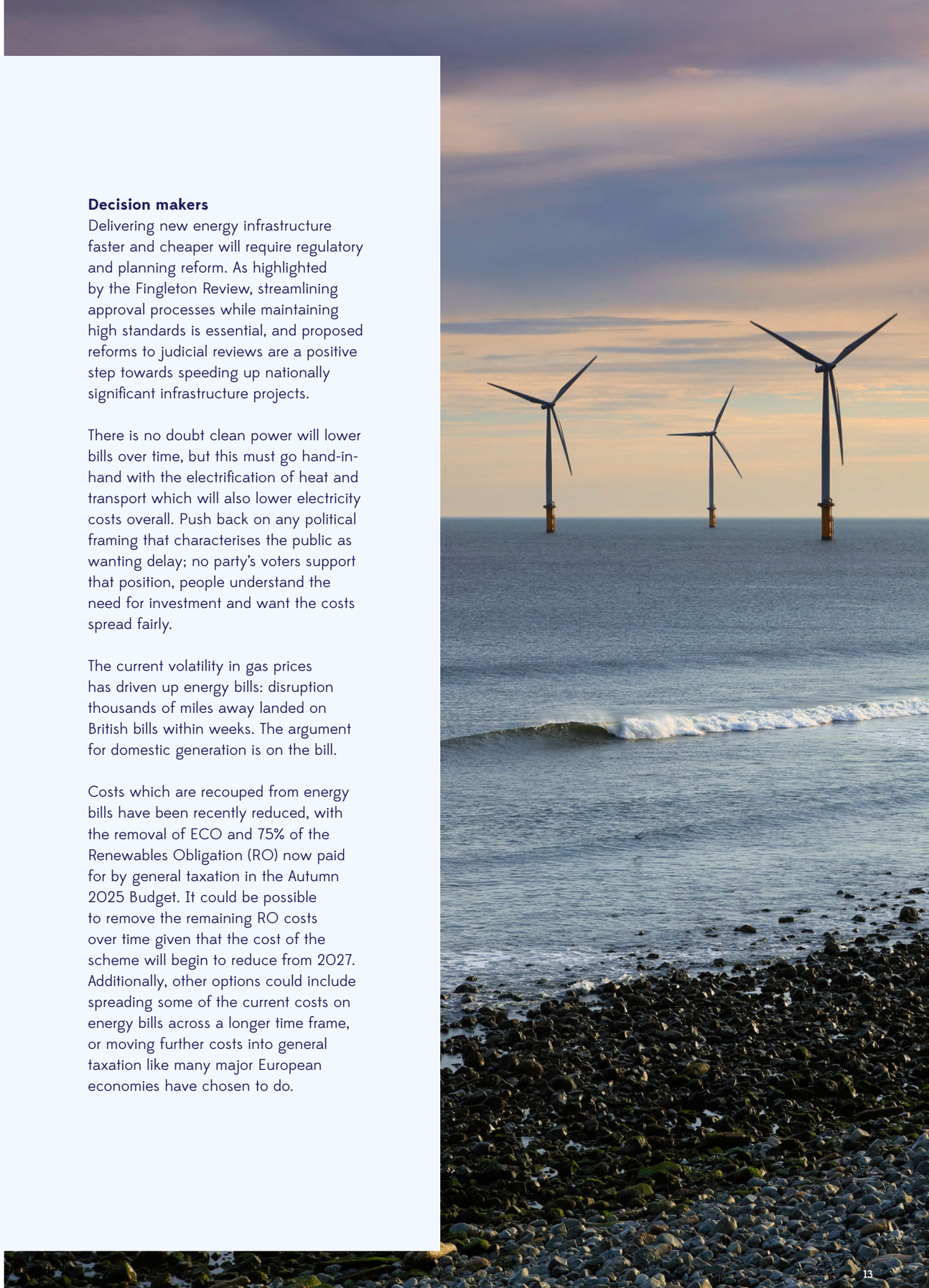
Public-facing message
Investing in British clean energy now, and spreading costs evenly over many years, is the fairest and cheapest way to protect ourselves from the next global price shock. Every year we delay increases our exposure to fluctuating prices and raises the overall cost. Building a stable, domestic energy system costs less over time than another decade held hostage to fossil fuel markets we do not control.

Decision makers
Delivering new energy infrastructure faster and cheaper will require regulatory and planning reform. As highlighted by the Fingleton Review, streamlining approval processes while maintaining high standards is essential, and proposed reforms to judicial reviews are a positive step towards speeding up nationally significant infrastructure projects.

There is no doubt clean power will lower bills over time, but this must go hand-in-hand with the electrification of heat and transport which will also lower electricity costs overall. Push back on any political framing that characterises the public as wanting delay; no party's voters support that position, people understand the need for investment and want the costs spread fairly.

The current volatility in gas prices has driven up energy bills: disruption thousands of miles away landed on British bills within weeks. The argument for domestic generation is on the bill.

Costs which are recouped from energy bills have been recently reduced, with the removal of ECO and 75% of the Renewables Obligation (RO) now paid for by general taxation in the Autumn 2025 Budget. It could be possible to remove the remaining RO costs over time given that the cost of the scheme will begin to reduce from 2027. Additionally, other options could include spreading some of the current costs on energy bills across a longer time frame, or moving further costs into general taxation like many major European economies have chosen to do.



3 | Climate change and reducing air pollution still matter

Finding

Climate concern has not left the picture. Whilst a small percentage of the population does not prioritise fighting climate change or reducing air pollution, most people do. People think this will rise in importance over time, to the leading consideration of future energy needs. There is no doubt that what matters most to people is ensuring low energy bills, but over time fighting climate change becomes more important to people than both energy security and reliance on imports.

When asked to rank six options of what matters most for people regarding the UK's energy future (Q3), fighting climate change ranks at least third across all political voting intentions, only behind ensuring low energy bills and energy security.

In a similar question asking about future energy needs, reducing pollution for future generations nationally ranks second of seven options, only behind supporting UK industry to remain competitive, and above the creation of new jobs, protection of existing jobs, paying more, or less, now and managing visual impact.

Whilst the support varies by voting intention, it's worth noting that climate priorities hold ground even amongst voters where the party position is to remove climate change legislation (Q3).

The reality

The public's priorities are aligned with the sector's long-term ambition. The solution to lower energy bills and lasting energy security happens to also be the solution to fighting climate change: clean, homegrown energy coupled with the electrification of heat and transport.

People care most about energy bills, and the main driver of high bills has been the price of gas over recent years. In second place is energy security, and a decarbonised energy system is one which is more secure. And third is concern on about climate change.

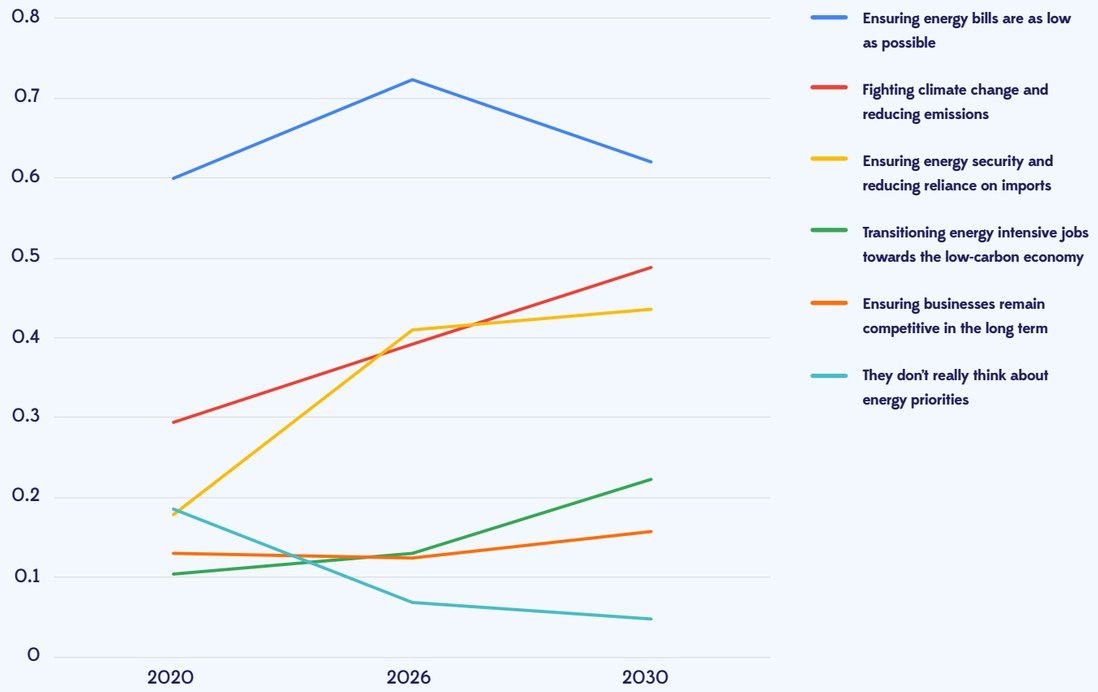
Air pollution is linked to 30,000 deaths a year in the UK, and costs the NHS billions of pounds each year (Royal College of Physicians, 2025). There is overwhelming scientific consensus that climate change is man-made and the planet is continuing to warm. Since the 1980s, each decade has been warmer than the previous one, and this trend increases the risk of heatwaves, floods, droughts, and fires (UK Met Office, 2026).

It is also important to mitigate the effects of climate change, as adapting to the impacts will cost both lives and livelihoods. In its Fourth Independent Assessment of UK Climate Risk, the Climate Change Committee showed that investing in urgent adaptation action is cheaper than climate damages (CCC, 2026).

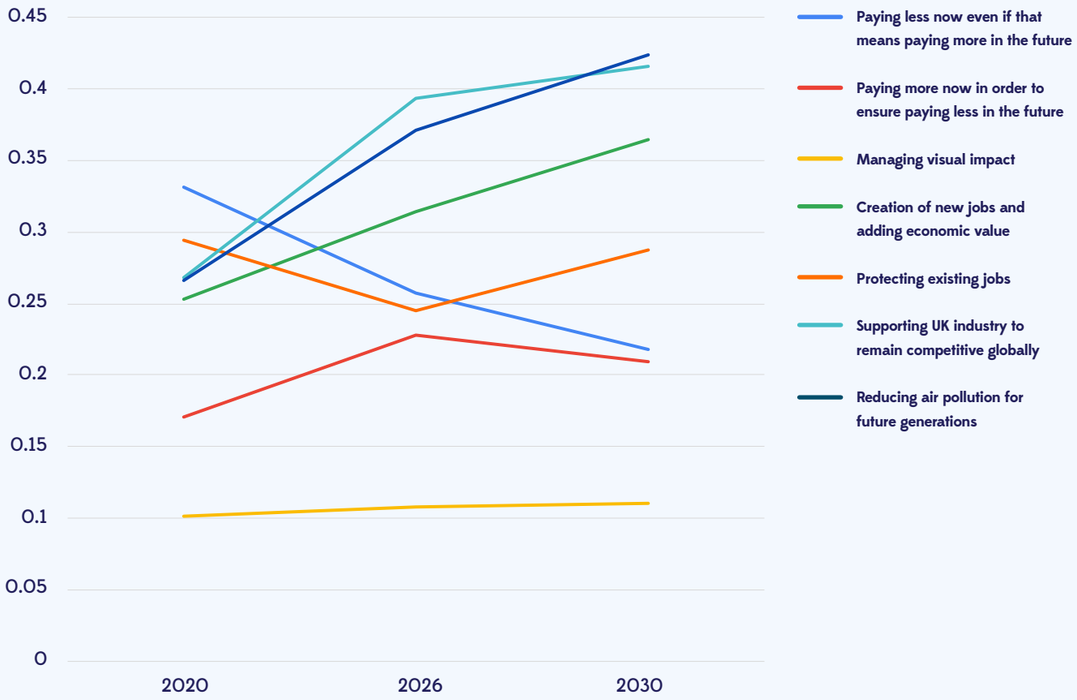
Supporting statistics

- When asked what matters most to them about the UK's energy future, fighting climate change ranks third overall at 39% and is projected to be second by 2030 at 49% (Q3), above energy security (44% in 2030).
- The importance of fighting climate change increases over time for all political groups (Q3).
- When given seven options regarding the country's future energy needs, reducing air pollution ranks second at 37%, behind global industrial competitiveness at 39% (Q7).
- Support for reducing air pollution increases from 27% in 2020 to 37% in 2026, becoming the main consideration of seven options at 42% in 2030 (Q7).
- Air pollution is linked to 30,000 deaths a year in the UK and costs the NHS billions of pounds each year (RCP, 2025).
- Investing in urgent adaptation action is cheaper than climate damages (CCC, 2026).

Q3 When people in your social circle think about the UK's energy future, which of these really matters most to them?



Q7 What do people in your social circle believe should be the main consideration when thinking about our future energy needs?



Implications

The energy transition story
The strong support outlined in previous insights for energy security and lower energy bills, or the breakdown in political consensus for fast action to mitigate climate change, may cause some to drop the climate argument altogether: do not. It still features highly in most people's priorities, and people expect it will increase over time. There is much confusion over the term Net Zero. Linking it to climate change strengthens public understanding of the former as a solution to the latter, instead of a nebulous, confusing, politicised term. And people still care about the climate.

Talking more physically about the impacts of climate change can also help. Reducing air pollution and saving lives, as well as the NHS a significant amount of money, is a more tangible and less politicised argument than reducing emissions.

Public-facing message
Both electrifying heat and transport, and ensuring a clean, cheap, reliable electricity system will not only break the link between energy bills and international events, it will improve our energy security, and reduce air pollution, saving thousands of lives each year as well as saving the NHS billions of pounds.

Decision makers
Do not underestimate public support for fighting climate change and reducing air pollution, even in parties where the position is to repeal climate legislation. The majority of the public still cares, and this is expected to increase. Where political parties have proposed to repeal current legislation or targets, it is important to offer an alternative which would ensure that investors continue to see the UK as an attractive destination for capital in what is a highly competitive global market.

4 | The public will back a flexible, storage-led system

Finding

Though we can predict it, it's no secret that we can't control when the wind blows or the sun shines. This means that no other country can control these sources of power, but also means that, at times, there will be excess electricity generation from renewables. When asked what to do with this electricity, the dominant public instinct is now one of support for storage, grid upgrades and smarter use of the clean power the country already generates (Q6), with only 4% backing the option to revert to a fossil fuel-based system. The public understands the question is no longer whether or not to build clean generation, but how to make what is being built work harder and travel further.

Storage is the single most-backed response to excess generation at 57%, up from 34% in 2020, maintaining the top response across all political affiliations. Grid upgrades sit just behind at 46%. Support for smart technology, to shift when people use energy, has more than doubled from 15% in 2020 to 32% today, and is projected to reach 43% by 2030 (Q6), demonstrating an awareness that flexibility will become more prominent for individuals. The desire to capture, store, and use clean power rather than throw it away is mainstream.

Awareness about the energy system has risen sharply across the board. The share of people who say they don't know enough about grid constraints to have a view has almost halved from 34% in 2020 to 18% today (Q6).

One gap remains, however, and it matters. Only 14% of the public associate the "energy transition" with transforming how we use energy across heat and transport – which stand as the two largest remaining decarbonisation challenges. Respondents expect this to rise to 22% by 2030 (Q9). That is movement, but from a low base. The connection between the energy transition and what happens inside people's homes and garages has not yet been made.

The reality

The grid, which transports electricity from generating stations of all kinds and sizes to people's homes and businesses, started to be built in the late 1920s. At that time Great Britain had a small number of large thermal generating power stations. As we change the way we generate electricity, which is vital to make sure we have enough of it in the future, we will need a more decentralised and flexible system. This is achievable but will require a number of tools including storage, demand flexibility and some upgrades to the grid.

The grid is currently not able to transport significant quantities of excess power from places like Scotland, with abundance of resources, to areas like London, with high demand. This results in what is known as constraint payments, essentially asking the excess generator to stop producing and reimbursing it for lost revenue.

Traditionally, this has been the cheapest way to ensure energy security within the current system, however, as more renewables are built, it's important to consider the many other ways to deal with this excess energy, including storing it, reinforcing the grid and changing how and when we use electricity.

Battery storage is essential for providing the security and flexibility that will make our future energy system resilient and reliable. The costs have reduced hugely, by 90% since 2010 (International Energy Agency, 2024), and the sector is growing: since 2020 the operational battery storage capacity in the UK has grown 509% (RenewableUK, 2025). Between 2024 and 2025, the UK grid-scale battery storage market grew 45% by operational capacity, with over 75% of this additional capacity coming from projects over 50MW (Energy Storage News, 2026).

However, storage is wider than just batteries. Whilst hydro power provides a modest 1.5% of our electricity generation (NESO, 2025), it can provide immediate frequency response to ensure stability of the grid. Power stations like Dinorwig in Wales have helped to get the system back online quickly when frequency has dropped by providing quick injections of clean power.

Additionally, power Carbon Capture, Utilisation and Storage (CCUS) serves as a flexible, dispatchable, and low-emissions source that complements variable renewable energy sources like wind and solar. Equally, hydrogen electrolysers support flexibility across the energy system by acting as controllable, high-speed, and flexible loads that can bridge the gap between periods of volatility across energy demand and production.

Flexibility is growing. The UK was the first country in the world to trial the Demand Flexibility Service, which was developed in around four months as a collaboration between industry and the UK Government in response to the 2022 gas price crisis. Now, many suppliers offer tariffs which discount or give away free electricity during times of peak demand, rewarding the individual customer whilst lowering system costs for everyone.

Whilst the power sector has lowered its emissions by over 80% since 1990 (Department for Energy Security and Net Zero, 2025), and the UK Government's target is for the system to run on at least 95% clean power by 2030, the Seventh Carbon Budget published by the Climate Change Committee (CCC) is clear that the majority of emissions reductions – around 60% – will come from electrification of the economy (CCC, 2025). That means switching from fossil fuels to electric vehicles (EVs), clean heat and electric industrial processes, while generating a lot of clean electricity to power this.

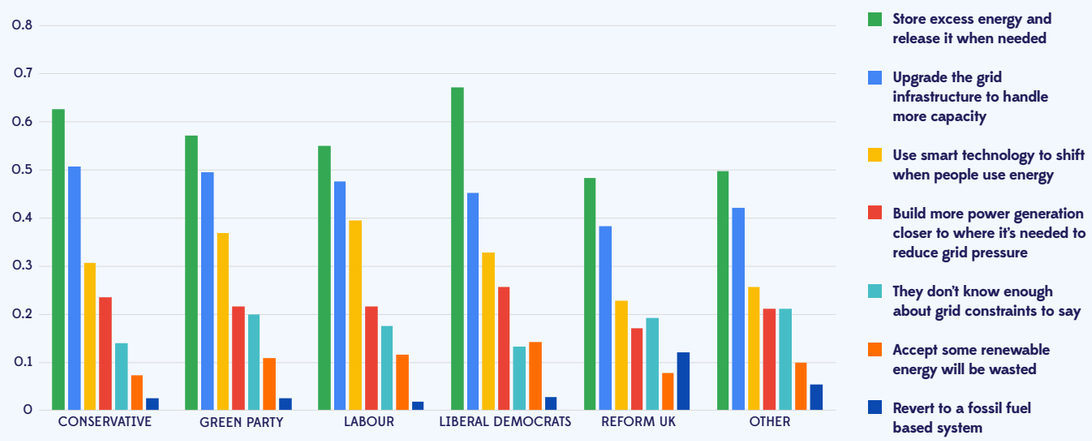
The roll-out of EVs is going well. EVs are now cheaper than petrol cars and there are more than two million EVs on the road. It took 14 years to reach the first million, and only two years to double to two million (RAC, 2026).

However, clean heat is progressing less well, with around 125,000 heat pumps sold in 2025 (Heat Pump Association UK, 2025), well under the UK Government's aim of over 450,000 annual heat pump installations by 2030 as part of its Warm Homes Plan. This £15 billion investment includes plans to make heat pumps the "natural choice" for heating and is supported by continued generous grants of up to £7,500 via the Boiler Upgrade Scheme. Whilst financial support is in place, and costs are coming down, a number of policy barriers remain, which are explored further in the subsequent section. Decarbonising home heating could provide economic opportunity of up to £22.5 billion (HPA UK, 2026), and heat networks will also play a significant role in decarbonising buildings, with heat network investment potential estimated to be up to £80 billion by 2050 (Heat Networks Industry Council, 2026).

Supporting statistics

- 57% of the public favour storing excess renewable energy when the grid has surplus, up from 34% in 2020 – the top-ranked response of seven options (Q6) across all political persuasions.
- Grid upgrades are backed by 46% of the public (Q6).
- Support for smart technology to shift when people use energy has more than doubled from 15% in 2020 to 32% today, and is projected to reach 43% by 2030 (Q6).
- Only 4% of the public would fall back on fossil fuels when there is excess clean energy. The desire to capture and use clean power is mainstream (Q6).
- Just 14% currently associate the energy transition with heat and transport – the two largest remaining decarbonisation challenges (Q6).
- The share of those who say they don't know enough about grid constraints to have a view has almost halved from 34% in 2020 to 18% in 2026 (Q6).
- Battery storage costs have reduced by 90% since 2010 (IEA, 2024).
- Since 2020 the operational battery storage capacity in the UK has grown 509% (RenewableUK, 2025).
- Between 2024 and 2025, the UK grid-scale battery storage market grew 45% by operational capacity, with over 75% of this additional capacity coming from projects over 50MW (Energy Storage News, 2026).
- EVs are now cheaper than petrol cars and there are more than two million EVs on the road. It took 14 years to reach the first million, and only two to double to two million (RAC, 2026).
- Decarbonising home heating could provide economic opportunity of up to £22.5 billion (HPA UK, 2026), and heat networks will also play a significant role in decarbonising buildings, with heat network investment potential estimated to be up to £80 billion by 2050 (HNIC, 2026).

Q6 Suppose that renewable energy generates more power than the grid can handle, what would people you know think would be the best solution?



Implications

The energy transition story

People resonate more when the conversation is about whole system, grids, storage (including long-duration hydrogen storage), flexibility, and smarter use of the clean power the country already generates, rather than generation in isolation. Tell the positive story of different technologies and how the costs have come down – using storage as a case study. It is a top-ranked response and it carries the security argument in infrastructure form. Storage supports the efficient use of what we already have.

Tangible, physical, UK-sited infrastructure (batteries, grid, hydrogen storage) can land better with some audiences than demand-shifting or flexibility language. The underlying policy is the same; the public-facing framing needs to shift.

Talk more about the role of decarbonising heat and transport. The low 14% figure from Question 6 shows a lack of awareness, and is a direct prompt. Every opportunity to associate the energy transition with heat pumps or heat networks, electric vehicles, and industrial electrification, rather than with generation alone, closes a gap that the data shows is currently open. These technologies not only improve energy security, they enable us to make the most of what is already there and the new generation being built.

Frame communications so it is not just about new pylons, it is about making sure we have enough electricity to meet our needs – from powering electric vehicles to hospitals. This requires clean power, flexibility and the need to reduce our reliance on fossil fuels for heating, cooking and transport, all three go hand-in-hand.

Avoid "electrify the economy"; many people won't know what it means. Be more specific, for example, when the time comes to upgrade, moving away from petrol and diesel vehicles to electric ones, moving away from gas boilers to electric heating. Always be mindful that this will happen at different stages for different people and should always be a choice, no one, no one should feel "told" what to do, especially when electricity costs are so high.

Clearly the quickest way to ensure a fair transition and to boost an electric future is to bring down the cost of electricity, and any communications should always be mindful of that.

Public-facing message

A smart, reliable energy system would mostly use Britain's natural resources to generate electricity, store extra power when there's more than we need, and release it when demand is high. It would also deliver that electricity to homes and businesses when required.

A modern electricity system isn't just about clean energy, it also needs to be flexible and responsive. That means being able to balance supply and demand in real time.

Storing energy and switching to electric heating and transport is one of the cheapest ways to use the country's abundant resources more efficiently. It also helps reduce our reliance on other countries and makes sure we have enough energy and that the price we pay doesn't spike during global disruptions.

Decision makers

Take a swift and meaningful action to reduce the price of electricity relative to gas (the 'spark gap'). This is one of the biggest blockers to the uptake of low-carbon technologies. There should also be increased investment in supporting the non-domestic sector and low-income properties across housing tenures, with a focus on decarbonising heat.

There are also barriers for customers who try to install low-carbon technologies in having to deal with many different organisations, including for some, applying for a grid connection. The consumer journey should be streamlined, in particular the Distribution Network Operator application process.

All governments plays an important role in supporting many of the technologies needed for greater flexibility in the energy system. There is no 'one size fits all', however, so governments must be agile in their approaches. Back flexible storage, including batteries, pumped hydro, thermal storage, CCUS and long-duration hydrogen, as national infrastructure, and continue incentivising the electrification of the economy in heat, transport, and industrial processes and the clean generation to power it. CCUS will also play a role in decarbonising industrial processes which can't be electrified.

Newer technologies may require some support to scale and to crowd in private sector capital, older assets may need something more bespoke that ensures they can be refurbished and provide a strategic role for many years to come. Alternatively, the publication, or lack of, a strategy for a certain part of the sector – including for industrial sites outside the clusters – could be the blocker, in which case the onus is on all governments to speed up the delivery.

5 | Clean energy is now an industrial story

Finding

When asked what the main consideration should be when thinking about our future energy needs (Q7), supporting UK industry to remain globally competitive is the fastest-rising of seven options, up from 27% in 2020 to 39% today and projected to reach 42% by 2030.

The jobs story has moved with it. Belief that clean energy creates jobs nationally has risen from 31% in 2020 to 42% today, and belief in local job creation from 20% to 27% (Q5). But the movement is uneven: 19% still say there is no local economic benefit (Q5). National numbers are not what will close that gap, the energy transition must be felt as a fair and just transition for all. This can only be done through visible, locally-sited evidence, from factories opening to training resulting in jobs, and British supply chains strengthening.

Scepticism is real but narrow. Across all voting preferences, at least one in five believes the level of job creation is exaggerated, ranging from 22% of Green Party voters to 38% of Reform UK voters. Again, opinions vary on whether clean energy eliminates more fossil fuel jobs than it can create, with Liberal Democrat voters the lowest at 9%, rising to 27% for Reform UK voters (Q5). These are not objections to the industrial case itself; they are doubts about delivery and about the transition of jobs from fossil fuel industries. Both are addressable – with evidence and an honest account of how the transition affects communities where fossil fuel jobs are concentrated.

The reality

Global competitiveness

High electricity prices have held back British businesses from competing globally, with companies operating here experiencing much higher electricity prices than many other Western economies (DESNZ, 2025; Ember, 2026). As outlined in the previous insights, the transition to clean electricity is essential for our future energy security, but more must be done to lower the cost of electricity here in Great Britain in order to both incentivise the transition and protect British businesses.

The cost of electricity is artificially inflated relative to the cost of gas. This is because more policy costs are placed on both household and business electricity bills compared to gas. The difference is known as the 'spark gap', and reducing this is essential to achieving the wider objective of electrification. While the UK Government has takene some steps to lower energy costs for the most energy intensive businesses through the British Industrial Competitiveness Scheme, it does not come into place until April 2027 and it will also only apply to around 10,000 businesses, or around 0.2% of the total number of businesses in Great Britain.

The bigger picture must not be forgotten. Reverting or continuing to a fossil fuel-based system is not only unpopular, it would leave Great Britain scrabbling around to catch up with other modernised economies, if we do not begin now in building the supply chains and skills base to support the transition ie The longer we wait, the more we will be competing with other countries for everything from parts to vessels to people.

Ensuring that mechanisms such as carbon pricing do not affect British businesses adversely is crucial, however, the answer is not to scrap carbon pricing altogether. Indeed it's the opposite. Removing the UK's carbon pricing would mean exposing British companies exporting to the European Union (EU) to £10 billion of extra taxes between 2026 and 2035, as they would be forced to pay the full amount due under the EU's Carbon Border Adjustment Mechanism (CBAM) regime (Energy UK, 2026). Its removal could also undermine substantial volumes of existing private investment decisions that are currently progressing based on a market structure that recognises the role of the current carbon price.

Carbon pricing is expanding rapidly worldwide. Jurisdictions with an Emissions Trading System (ETS) now represent 63% of global GDP and more than half of the world's population. Among the world's major trading blocs, carbon pricing mechanisms are already in place in the EU, China, many US states, and, from 2026, India as well.

If the UK retreats from carbon pricing, it risks isolating itself from the direction in which global trade and industry are heading. As other economies use carbon markets to support emerging low-carbon industries and shape international trade rules, British businesses could face growing barriers abroad and fall behind in sectors that will drive future growth. A stable, practical carbon pricing framework combined with closer cooperation with the EU through a linked system would help the UK protect its economic position and reduce costs for industry over the long term.

Clean energy jobs

The energy system is transforming and this will provide hundreds of thousands of new jobs in clean energy, however, it will still be important to ensure that those transitioning from other sectors are supported.

The UK Government's Clean Energy Jobs Plan, published in October 2025, estimates that there are around 400,000 clean energy jobs, and that this figure needs to double by 2030, with high demand across all regions, particularly in Scotland, the East of England, and the North West (DESNZ, 2025).

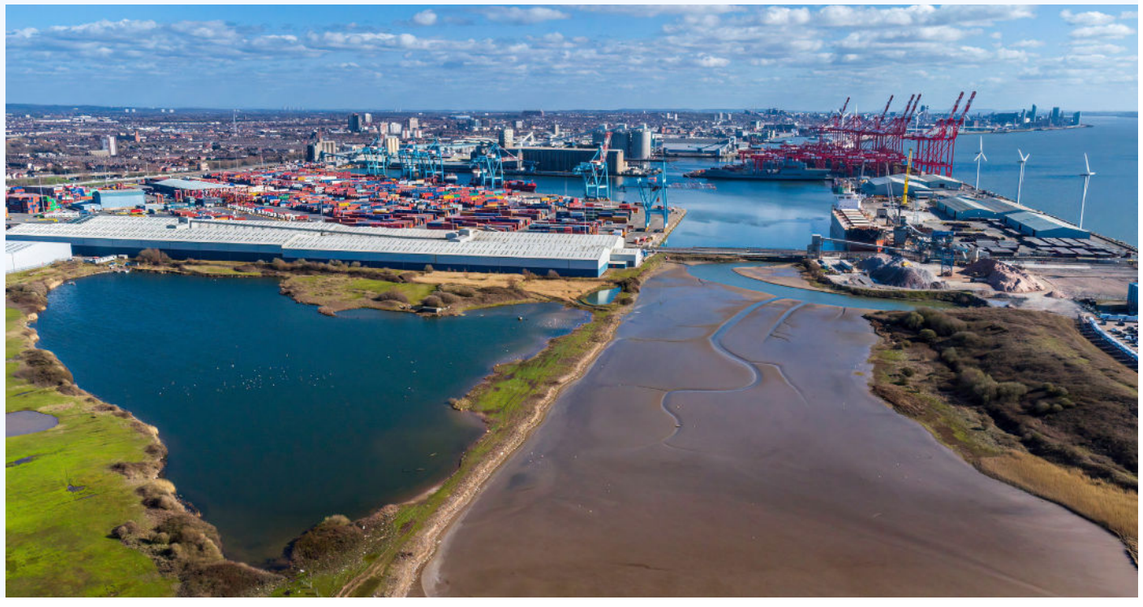
Some roles necessarily need to be located near certain infrastructure or geographies, for example offshore wind turbine technicians near coastal areas, nuclear engineers near nuclear power stations. However, there is also expected to be a huge increase in roles which do not have any locational boundaries, such as welders and electricians, heat pump engineers and solar panel installers, to name a few.

Whilst the findings of this polling show that the public places more importance on creating new jobs than protecting existing jobs (31% in 2026, to 25% respectively, Q7), supporting those transitioning across sectors has been a major focus across the energy industry, with strategies in place to facilitate an easier move from working in oil and gas to renewables.

Initiatives like the 'Skills Passport' developed by the industry and the UK and Scottish governments have been designed to make it as easy as possible for people to transfer from other sectors by recognising the existing skills and qualifications they have, as well as mapping out potential future career pathways within the clean energy sector based on their existing skill set and aspirations.

A recent report from Energy UK's Young Energy Professionals Forum indicated that a lack of awareness of roles may be one of the biggest barriers for people joining the sector (Energy UK, 2026).

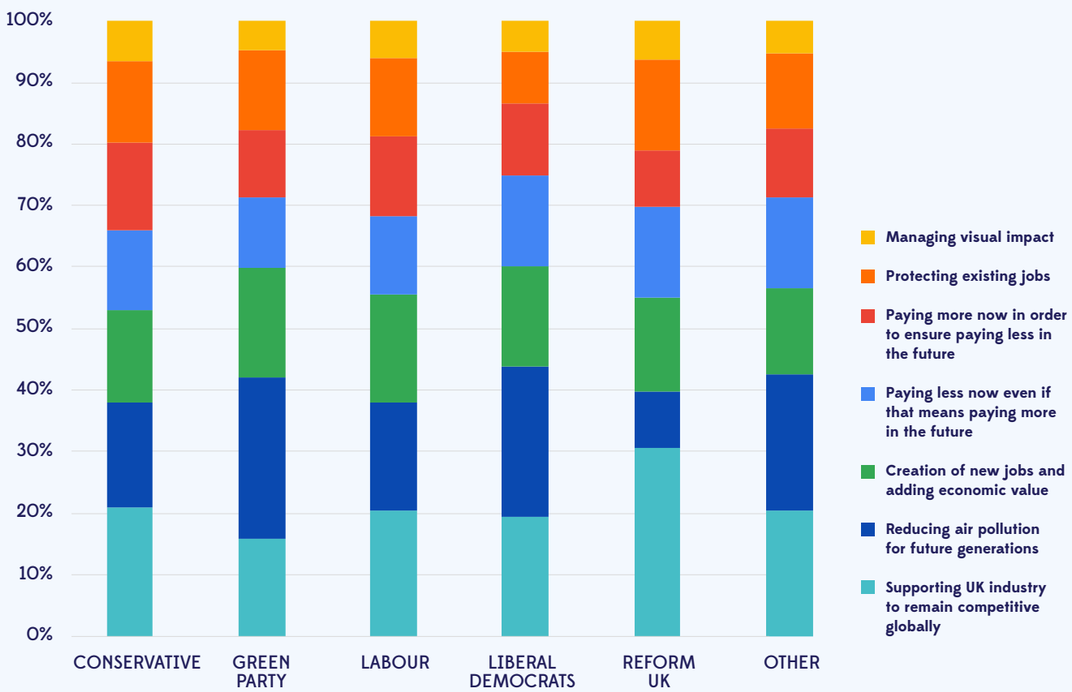
Led by Energy & Utility Skills, the sector has launched a new campaign, Destination Energy, which seeks to provide better information about the roles available and qualifications required to join the energy industry, targeting various audiences from veterans, to oil and gas workers to school leavers. It follows in the footsteps of Destination Nuclear, the first sector-wide recruitment and outreach campaign created through the Nuclear Skills Plan to help fill the 40,000 skilled roles the UK nuclear sector will need by 2030.



Supporting statistics

- UK industrial competitiveness is the fastest-rising priority for the future of seven options in Q7, at 39% today and projected to reach 42% by 2030 (Q7).
- Removing the UK's carbon pricing would mean exposing British companies exporting to the European Union (EU) to £10 billion of extra taxes between 2026 and 2035, as they would be forced to pay the full amount due under the EU's Carbon Border Adjustment Mechanism (CBAM) regime (Energy UK, 2026).
- Jobs in the Net Zero sector generate on average £119,300 in GVA per full-time job, around 48% above the UK average (CBI Economics, ECIU, 2026).
- For every £1 of economic value created directly by Net Zero firms, a further £1.85 is generated across the wider UK economy (CBI Economics, ECIU, 2026).
- The belief that clean energy creates jobs nationally has risen from 31% in 2020 to 42% today (Q5).
- Local job creation belief has risen from 20% to 27%, but 19% still see no local economic benefit, a gap. that only local, tangible evidence will close (Q5)
- Across all voters there is a degree of scepticism concentrated on delivery, rather than direction: at least one in five in every voting intention say the jobs claim is exaggerated and, whilst it varies according to party alignment, higher percentages of Reform UK (27%) and Conservative (20%) voters believe clean energy eliminates more fossil fuel jobs than it can create (Q5).
- There are around 400,000 clean energy jobs, and this figure needs to double by 2030, with high demand across all regions, particularly in Scotland, the East of England, and the North West (DESNZ, 2025).
- A survey of young energy professionals revealed the biggest perceived barrier discouraging people from entering the energy sector was a gap in knowledge about which jobs exist – far exceeding any other barrier (Energy UK, 2026).

Q7 What do people in your social circle believe should be the main consideration when thinking about our future energy needs?



Implications

The energy transition story

Frame clean energy as reindustrialisation, the creation of highly-skilled, well-paid jobs, and British supply chain strength, rather than as environmental policy. Use local and tangible examples: the factory offering jobs making turbine components, the heat network delivering lower bills to local businesses, the heat pump apprentice without university debt, how local businesses have used power CCUS to ensure heavy industry has reliable, flexible power. When talking about jobs, it's important to acknowledge the transition from fossil fuel jobs is a real concern that the sector takes seriously, particularly in communities and in regions where fossil fuel jobs are concentrated. This must be addressed head-on, and accompany communications around job creation and benefits. Avoid national statistics that sceptical audiences can challenge or don't relate to; stick to specific, verifiable, local facts. Hundreds of thousands of jobs doesn't mean anything to people if they can't understand how it could affect them, tell the stories which demonstrate local benefit.

Frame the conversation around recognition, not acceptance. "Growing acceptance" reads as patronising, with the sector asking to be tolerated rather than seen. Communities are already recognising what clean energy is doing in their region; the task is to show more of what is there, not to win an argument.

Public-facing message

British businesses are being exposed to high electricity prices, which is threatening their competitiveness. The cost of electricity must be reduced to enable them to compete globally. In the long term, decarbonisation and electrification of industry will safeguard businesses from price spikes, but more support is needed to help businesses transition, and during this current price spike. Businesses that have already installed solar panels or onsite generation, or have reduced their use of fossil fuels by electrification or decarbonising their processes, are already saving compared to those that haven't.

The energy transition will create good, long-term jobs all over the country, from Perth to Penzance. These jobs range from technical roles, such as electricians, welders and engineers, to more office-based roles such as planners, project managers, lawyers and accountants. Companies are actively targeting people from all backgrounds, as some roles don't require previous knowledge or training, and qualifications can be gained on the job.

Decision makers

Low-carbon technologies – such as CCUS, hydrogen and electrification – are industrial strategy as well as energy strategy, and infrastructure needs long-term policy stability so it can be deployed at the lowest cost, as soon as possible. The 39% of the public who now prioritise global competitiveness points directly to the important role these technologies will play in safeguarding UK industry.

But the success of any area with potential for industrial rejuvenation all comes back to electricity being cheaper than gas and competitive on price more broadly. Without cheap electricity both for households and businesses, the economy stagnates, there isn't as much investment as needed, and prices remain high, leading to a continuous cycle. The public wants to see this delivered, and the private sector can make it work with political support. Rebalancing remaining policy costs away from electricity bills is an immediate action that would bring down bills.

6 | Confusion remains around the reality of today's energy system

Finding

The public is broadly supportive of the clean energy transition, but there are still misperceptions about the energy system and its costs. These views can form the foundation for people's sentiment towards the sector and support for different policy choices.

First, supplier profit overestimation. The average (median) public estimate is 40% (Q12), far above the actual supplier profit share of a typical household energy bill – around 2.5% in the price cap at the time of survey. And unlike every other misperception in this dataset, it has not moved. The median sits at 40% in 2020, 40% today, and 40% projected for 2030 (Q12).

The figure also hides sharp segmentation. Among the youngest voters (18-34), the median estimate is 50% (Q7). Conservative voters estimate 30%, Green Party and Other voters 50%. Every investment argument, every cost-benefit framing, every "your bill pays for" message the sector makes runs into an incorrect background assumption that no amount of general communication has dislodged.

One in five people think green policy costs are extra profit for energy companies (Q8), and the reading is not confined to one political group. Reform UK voters (28%) and Green voters (25%) both score this more highly than Labour, Conservative, or Liberal Democrat voters (all below 20%, Q8). The story that "big energy is profiting from ordinary people" sits at roughly the same strength on either side of the political spectrum.

Second, clean power progress underestimation. The median public estimate of GB electricity generation from clean sources is 40% (Q11), below the actual contribution of around 55% when accounting only for renewables and nuclear energy (DESNZ, 2026). People underestimate the level of progress already made, and therefore may overestimate the transformation to come.

Third, Clean Power 2030 misunderstanding. The UK government aims to achieve a fully clean electricity system by 2030, with at least 95% of generation from low-carbon sources and a carbon intensity below 50g CO_2 per kWh. This recognises the important role gas plays on the system, allowing for 5% gas generation in 2030. Most people think in its ambition to achieve Clean Power by 2030, the UK Government is aiming for 100% renewable generation (36%, Q10). This is the most popular explanation across all political voting intentions and age groups, aside from age 65+ which includes nuclear in its majority explanation. Less than a quarter of the general population are aware that the Clean Power 2030 target incorporates a small amount of fossil fuel generation as a flexible back-up (23%, Q10).

Fourth, visual impact. At 11% nationally, visual impact is the lowest-ranked of the seven options in Q7, when asked what should be the main consideration when thinking about future energy needs. It is stable across time (10% in 2020, 11% today, projected 11% in 2030) and across every political party in 2026, from 10% among Liberal Democrat voters to 12% among Labour voters (Q7). On the same question, industrial competitiveness was selected by 39% of social circles, air pollution by 37%, and protecting existing jobs by 25% – all considerably above visual impact. In planning debates, visual impact is routinely treated as a dominant community concern. When respondents are asked which considerations should drive energy planning, it seems to rank last across all voting intentions. The results of this survey are not split geographically, they show sentiment across a nationally representative study. It's worth noting results would likely vary according to location.

A more engaged public

The public is increasingly thinking about the implications of a changing energy system; there is a reduction in the proportion of people who don't think about energy in security terms (27% in 2020 to 13% in 2026, Q2), who don't think about energy priorities (19% in 2020 to 7% in 2026, Q3), who don't think about how world events affect their energy bills (17% in 2020 to 5% in 2026, Q4), and who don't know about grid constraints (34% in 2020 to 18% in 2026, Q6). Whilst there is a decline in those not sure what energy transition means (Q9, from 34% in 2020 to 18% in 2026), in 2026 those who don't know rank higher than those who consider the electrification of heat and transport (14%). This is expected to reverse in the future, with more associating the energy transition with heat and transport (22%), than not knowing (14%).

The reality

The energy system is complex, and it's not at the top of most people's minds to understand. So it's understandable that people might not have the most up-to-date information. Whilst the sector continues to promote the facts, it can take an order of magnitude more effort to refute inaccuracies than it does to put them out there.

There needs to be a coordinated effort to ensure the reality is understood by the public.

Taking each of the misconceptions in turn:

Energy supplier profits are limited by the price cap, set four times a year by Ofgem the energy regulator, as the maximum amount that energy suppliers can charge domestic customers.

In the price cap covering the period from April to July 2026, which came into place whilst this survey was undertaken, the allowance for earnings before interest and tax was set at around 2.5%. In reality, many suppliers don't even achieve this, often losing money on household accounts. Across the sector, the level of household debt (money owed to energy suppliers) is the highest it's ever been, reaching over £5.5 billion in 2026, and potentially £7 billion by the end of the year (Energy UK, 2026).

In 2025, around 55% of electricity across the year was from nuclear and renewables (DESNZ, 2026), although at times it can be higher: more recently, in April 2026, the electricity grid broke a new record, running at 98.8% clean sources, with just 1.2% gas (NESO, 2026). The lower estimates across all political views demonstrate a clear need for the sector to communicate progress more effectively. The implications of underestimating progress is that people may overestimate the transformation yet to come. There is much to celebrate in how far our power system has already been transformed.

The UK Government's Clean Power 2030 target sets out the following metrics:

- Metric 1a: Clean sources produce at least as much power as Great Britain consumes in total
- Metric 1b: Clean sources produce at least 95% of Great Britain's generation
- Metric 2: Reduce the carbon intensity of electricity generation to below 50g CO_2e/kWh

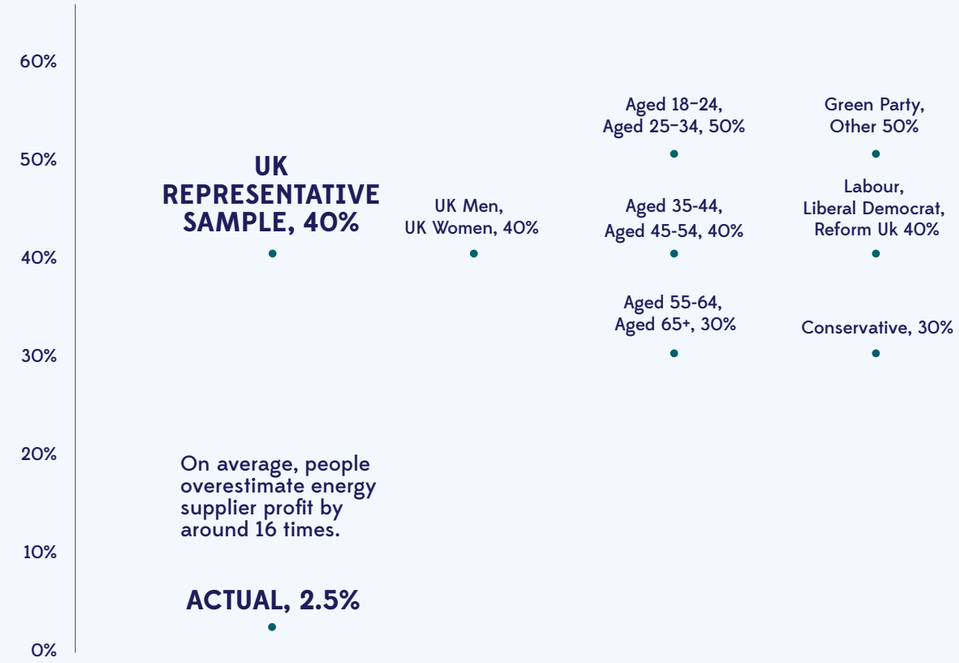
This allows for up to 5% of Great Britain's generation to come from gas in 2030. Yet, when people hear "Clean Power by 2030", they assume it doesn't include any fossil fuel generation, with most also discounting nuclear generation, and assuming 100% renewable generation. This has implications, because in Great Britain, a system run solely on renewable generation, and no other technologies, would indeed be very costly. By allowing for some flexible gas generation, as well as electrifying heat and transport, and improving flexibility, the system can be decarbonised and strengthened at the lowest cost.

Whilst the misconceptions set out above show confusion around the energy transition, its progress, the costs and who benefits, most answers indicate a growing trend over time in thinking about energy more and becoming more literate about the system. Technical concepts such as zonal pricing, constraint payments and decoupling are now part of mainstream language, with the public eager to understand more, but limited voices answering their questions.

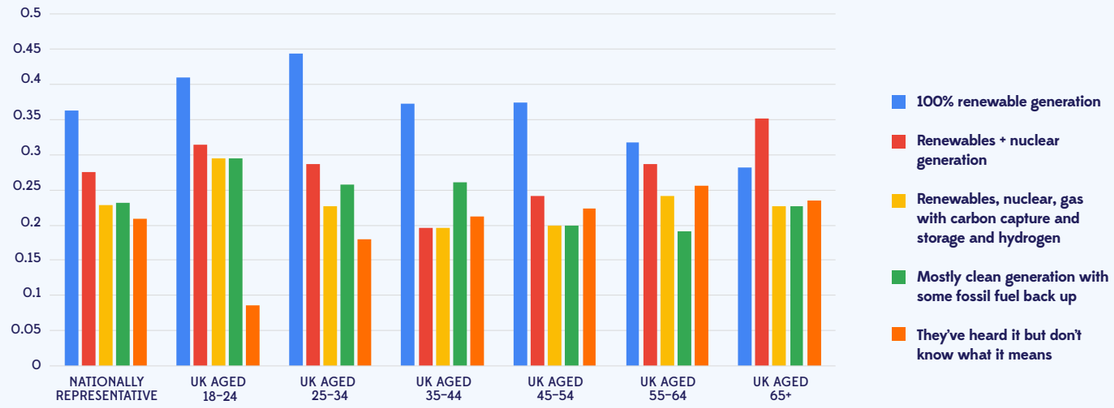
Supporting statistics

- The median public estimate of supplier profit is 40%, 16 times the allowable maximum level. There is clearly little understanding that the regulator caps the maximum level of supplier profit at around 2.5% (Q12).
- The estimation of energy supplier profit is the only median in the dataset that shows no movement at all – 40% in 2020, 40% today, 40% projected for 2030 (Q12).
- Among the youngest voters (18-34), the median profit estimate is higher (50%, Q12).
- Across the sector, the level of household debt (money owed to energy suppliers) is the highest it's ever been, reaching over £5.5 billion in 2026, and potentially £7 billion by end of the same year (Energy UK, 2026).
- On green policy costs, 28% of Reform voters and 25% of Green voters say they are extra profit for energy companies (Q8) – reflecting a similar level of scepticism on both sides of the political spectrum.
- The public estimate of clean electricity in GB is 40%, below the actual level of clean electricity generation today – 55% in 2025, when considering only nuclear and renewable electricity (Q11). Other forms of generation are also often counted, such as biomass, and interconnectors, which quotes a total of low-carbon sources at 64.8% (DESNZ, 2026), however, this survey focussed primarily on nuclear and renewables, which was reflected within the question.
- In April 2026, the the electricity grid broke a new record, running at 98.8% clean sources, and just 1.2% gas (NESO, 2026).
- Only 23% identify the full description of what Clean Power 2030 means; 36% think it means 100% renewable generation (Q10).
- Visual impact is ranked a main consideration by just 11% of the public – the lowest-ranked of seven options (Q7), consistent across every age band and political party.

Q12 What proportion of an energy bill do people you know think is their energy supplier's profit?



Q10 What do people in your social circle think the Government's "clean power by 2030" target means for energy production?



Implications

The energy transition story

Close the gap with clear, practical explanations and be upfront and honest: where the money from a bill actually goes, what is being built locally, and how it tangibly benefits communities.

The phrase "energy company profits" is the phrase the public uses and it conflates different companies operating across the value chain. This has led to an assumption that nearly half of an energy bill is retail energy supplier profit, 16 times the maximum level allowed – though in reality many energy suppliers will make less. Addressing this head-on is challenging, as any discussion on profit is difficult when energy bills are so high, but the consequence of not being upfront is that people assume a much higher amount. The fact that one in five nationally, and as high as one in four depending on political persuasion, thinks that green policy costs are extra profit, says a lot about how the sector and governments over time have explained what the costs are. There is a need to explain how these costs are an investment in the energy system and, alongside this, provide a predictable investment framework to deliver energy securely for many years to come.

The lack of awareness on progress in the transformation to date can be countered with more positive communications, but this should be balanced against the backdrop of high energy bills. Addressing high bills must be front and centre of any communications, and the link between progress on clean power and lower costs should be made clearly.

Sector language about "transforming the energy system" reinforces the false baseline; the frame should be progress made, progress continuing, and clear illustration of how this will reduce costs. Energy bills remain the highest priority.

The concern around large transformations can also be addressed by referring to the system-wide generational changes already made from coal to gas.

The fact that many people don't know that the UK Government isn't aiming for an ideological system of 100% renewable power suggests that there needs to be a better explanation of what the future energy system will require. Arguments that pitch gas against renewables can be countered with the fact we will need both. Stressing that the target considers cost over decarbonisation is essential.

Make communications tangible and local as well as national needs, and benefits such as job creation. The visual impact data shows nationally that other priorities are more important.

Public-facing message
Clean energy is already happening – in your community, on your bill, in the jobs being created nearby. We're already running the electricity system with mostly clean power, and as we generate more and move to electric heating and transport, costs will come down even more. Clean energy has already lowered wholesale costs and will continue to do so.

A 100% clean power system at any cost isn't the target, a mostly decarbonised system which powers heat and transport, is sustainable in the long term and is cheaper to run is the goal. There will still be some gas on the system in 2030.

We have already undergone huge changes to our electricity system, to modernise and move to one which will last for many years to come. In just ten years, Great Britain reduced coal power from its main generating source to completely phasing out its use. Gas was once our top source of electricity generation, now it is wind. We generate more from clean energy sources than we do from fossil fuels and we are on the cusp of running a 100% clean energy grid (98.8% achieved in April 2026).

The country is not starting from scratch; it is building on real progress. And this in turn will protect our energy needs no matter what is happening globally, and protect our prices too.

Decision makers
Be more specific in government communications on what the Clean Power 2030 target actually means, so that the residual unabated gas element is more visible, and be clear on the rationale for having it. Gas is, and will remain, an incredibly important part of the energy system for decades to come and it's cheaper to get most of the way there, than to push for 100%. Continue to correct the clean generation estimate proactively: "The grid is already nearly three-quarters clean" is a positive proactive message, not a defensive one, and every communication that uses "transforming the energy system" language reinforces the false baseline.

Stop using the phrase "energy company profits" to give a more accurate description of which part of the energy sector being referred to. Energy retailers have a connection with almost every household and business in the country, so trust between the two is essential. Household customers must feel safe to disclose vulnerabilities and ask for support, and pedalling narratives of large profits in areas of the sector where debt is already a huge issue does not improve customer trust.

Listen to the message on visual impact. When asked to choose, people rate other considerations more highly.

CONCLUSION

For politicians, the results show striking support for more clean energy and improved energy security, and this is still a top priority for most people across all parties.

There is every reason to continue the ambitious drive for a low-carbon energy system.

The findings in this research describe a public that is substantially more aligned with the sector than communications typically assume, and more system-literate than the prevailing conversation might credit. Across almost every measure, support for the clean energy transition has risen since 2020. The security case has moved from minority to majority. The instinct to store, capture, and use clean power is mainstream. Visual impact is consistently one of the lowest-ranked concerns. The public wants investment, not delay. The working coalition for a clean, secure, British energy system is already in place.

However, what sits underneath that supportive coalition is less comfortable. The public significantly underestimates how much of the grid is already clean. It significantly overestimates the share of the bill that goes to supplier profit. And it misunderstands what the Clean Power 2030 target actually means, with most believing it implies 100% renewable generation rather than mostly clean energy generation with some fossil fuel back-up. These are not small gaps. They shape what the public hears every time the sector speaks, and conventional industry communications have not closed them.

The profit misperception might be the most consequential. The median estimate sits at 40% in 2020, 40% today, and 40% projected for 2030 (Q12), the only figure in the dataset that shows no movement across the three time perspectives. Every investment and cost-benefit argument the sector wants to make has to get past that assumption first. Correcting it is the prerequisite for the rest of the communications agenda, not an addition to it.

The implication across all six insights is the same. The work is not to communicate more, but to communicate better, with more local detail, more specific corrections, and more willingness to name where the public has a real misreading that the sector has not corrected. Communicate with consistency and integrity, so the same core themes are reaffirmed at every chance.

Appendix: Full findings

The appendix presents the full dataset behind the insights and recommendations in the main report. It is organised as follows:

A.1 through A.12: questions as asked in the survey, with UK-total results across the three time perspectives (2020, 2026, 2030), a brief data-focused trend note, and segmentation tables by gender, age, and political party.

A.1 Question 1

When it comes to critical energy infrastructure investment, in addition to private sector investment, what do people in your social circle think is the fairest approach?

UK total, across three time perspectives

Response option	2020	2026	2030
Pay slightly more now in order to reduce costs long-term	22.29%	19.28%	19.88%
Keep bills lower now even if it costs more later	36.55%	27.61%	25.40%
Spread the costs evenly over many years	37.35%	50.00%	46.79%
To fund investments through public spending	19.08%	25.50%	27.11%

The top two options have reversed. Spreading costs over many years and keeping bills lower now were effectively tied in 2020 (37.35% vs 36.55%). By 2026, spreading costs has risen to 50.00% while "keep bills lower now" has fallen to 27.61%. Public spending as a preferred route has also grown, from 19.08% to 25.50%

Segmentation by gender and age, 2026

Response option (2026)	UK	Men	Women	18-24	25-34	35-44	45-54	55-64	65+
Pay slightly more now in order to reduce costs long-term	19.28%	22.27%	16.28%	29.52%	23.95%	16.57%	18.67%	14.56%	18.75%
Keep bills lower now even if it costs more later	27.61%	27.73%	27.33%	26.67%	29.94%	25.44%	25.30%	30.27%	25.78%
Spread the costs evenly over many years	50.00%	47.06%	52.91%	48.57%	53.89%	56.21%	51.81%	46.74%	42.19%
To fund investments through public spending	25.50%	27.73%	23.45%	17.14%	29.34%	28.99%	26.51%	24.14%	24.22%

Segmentation by political party, 2026

Response option (2026)	UK	Conservative	Green Party	Labour	Liberal Democrat	Reform UK	Other
Pay slightly more now in order to reduce costs long-term	19.28%	23.49%	24.10%	20.42%	15.93%	16.31%	12.78%
Keep bills lower now even if it costs more later	27.61%	28.92%	22.29%	26.67%	26.55%	36.17%	25.56%
Spread the costs evenly over many years	50.00%	46.99%	49.40%	51.67%	48.67%	47.52%	54.14%
To fund investments through public spending	25.50%	22.29%	28.31%	25.83%	27.43%	16.31%	30.83%

A.2 Question 2

What impact do people in your social circle believe clean energy infrastructure like wind, solar, biomass, nuclear, carbon capture and storage and hydrogen, has on our ability to provide our own energy, in an increasingly unstable international environment?

UK total, across three time perspectives

Response option	2020	2026	2030
It makes the UK more energy secure	35.74%	63.45%	58.84%
It makes the UK less energy secure	7.33%	7.33%	8.84%
It has no real impact	27.41%	10.64%	8.43%
Makes us more vulnerable due to dependency on global supply chains	9.24%	9.24%	10.34%
Makes us more secure due to independence from global supply chains	15.36%	33.84%	37.85%
They haven't thought about it in security terms	26.81%	12.85%	9.84%

The headline security view has risen +27.71 points since 2020. Independence from global supply chains has more than doubled, from 15.36% to 33.84%. The "no real impact" and "haven't thought about it" shares have each more than halved. Negative views (less secure, more vulnerable) have held broadly steady at low single digits.

Segmentation by gender and age, 2026

Response option (2026)	UK	Men	Women	18-24	25-34	35-44	45-54	55-64	65+
It makes the UK more energy secure	63.45%	64.29%	62.60%	60.00%	66.47%	59.17%	71.69%	59.39%	65.63%
It makes the UK less energy secure	7.33%	9.45%	5.23%	9.52%	10.78%	6.51%	4.22%	8.81%	3.13%
It has no real impact	10.64%	10.29%	10.85%	9.52%	8.38%	15.38%	7.83%	10.73%	11.72%
Makes us more vulnerable due to dependency on global supply chains	9.24%	7.14%	11.24%	18.10%	10.18%	5.33%	5.42%	11.11%	7.03%
Makes us more secure due to independence from global supply chains	33.84%	35.29%	32.56%	25.71%	37.72%	35.50%	37.95%	30.27%	35.16%
They haven't thought about it in security terms	12.85%	11.55%	13.76%	14.29%	13.77%	15.38%	9.04%	13.79%	10.16%

Segmentation by political party, 2026

Response option (2026)	UK	Conservative	Green Party	Labour	Liberal Democrat	Reform UK	Other
It makes the UK more energy secure	63.45%	63.25%	69.88%	71.25%	71.68%	42.55%	54.89%
It makes the UK less energy secure	7.33%	9.04%	4.22%	5.00%	3.54%	14.89%	9.02%
It has no real impact	10.64%	12.65%	4.82%	10.42%	2.65%	18.44%	15.04%
Makes us more vulnerable due to dependency on global supply chains	9.24%	9.64%	5.42%	6.25%	7.08%	22.70%	7.52%
Makes us more secure due to independence from global supply chains	33.84%	34.94%	40.96%	35.00%	41.59%	23.40%	28.57%
They haven't thought about it in security terms	12.85%	6.63%	15.66%	12.08%	13.27%	12.06%	16.54%

A.3 Question 3

When people in your social circle think about the UK's energy future, which of these really matters most to them?

UK total, across three time perspectives

Response option	2020	2026	2030
Ensuring energy bills are as low as possible	59.94%	72.29%	62.05%
Fighting climate change and reducing emissions	29.42%	39.26%	48.80%
Ensuring energy security and reducing reliance on imports	17.87%	41.06%	43.57%
Transitioning energy intensive jobs towards the low-carbon economy	10.44%	12.95%	22.29%
Ensuring businesses remain competitive in the long term	13.05%	12.45%	15.76%
They don't really think about energy priorities	18.57%	6.83%	4.82%

Bills remain the dominant priority, rising from 59.94% to 72.29%. Fighting climate change has risen from 29.42% to 39.26%, and energy security has more than doubled from 17.87% to 41.06%. The share saying they "don't really think about energy priorities" has fallen from 18.57% to 6.83%.

Segmentation by gender and age, 2026

Response option (2026)	UK	Men	Women	18-24	25-34	35-44	45-54	55-64	65+
Ensuring energy bills are as low as possible	72.29%	71.64%	72.87%	64.76%	73.05%	71.01%	74.70%	75.10%	70.31%
Fighting climate change and reducing emissions	39.26%	35.50%	42.44%	48.57%	49.10%	36.09%	38.55%	32.95%	36.72%
Ensuring energy security and reducing reliance on imports	41.06%	42.23%	40.12%	32.38%	31.14%	41.42%	42.17%	44.44%	52.34%
Transitioning energy intensive jobs towards the low-carbon economy	12.95%	14.08%	12.02%	16.19%	22.16%	11.83%	12.65%	7.28%	11.72%
Ensuring businesses remain competitive in the long term	12.45%	14.92%	10.27%	9.52%	13.17%	13.02%	7.23%	13.41%	17.97%
They don't really think about energy priorities	6.83%	6.93%	6.78%	6.67%	6.59%	9.47%	7.23%	7.66%	1.56%

Segmentation by political party, 2026

Response option (2026)	UK	Conservative	Green Party	Labour	Liberal Democrat	Reform UK	Other
Ensuring energy bills are as low as possible	72.29%	69.88%	70.48%	69.58%	75.22%	75.18%	76.69%
Fighting climate change and reducing emissions	39.26%	37.35%	57.83%	40.83%	43.36%	18.44%	33.83%
Ensuring energy security and reducing reliance on imports	41.06%	49.40%	34.34%	43.33%	47.79%	39.01%	33.08%
Transitioning energy intensive jobs towards the low-carbon economy	12.95%	14.46%	18.67%	13.75%	13.27%	7.09%	9.02%
Ensuring businesses remain competitive in the long term	12.45%	15.06%	8.43%	13.33%	11.50%	18.44%	8.27%
They don't really think about energy priorities	6.83%	3.61%	10.24%	5.00%	4.42%	7.80%	9.77%

A.4 Question 4

What impact do people in your social circle think that international events have on our energy bills?

UK total, across three time perspectives

Response option	2020	2026	2030
Bills go up and never come back down	47.99%	69.98%	68.67%
Bills spike but settle back after a while	30.12%	25.50%	22.59%
World events matter less than people think – it's mostly government decisions	17.77%	9.84%	14.76%
They don't think about how world events affect their bills	17.17%	4.62%	5.32%

The view that international events push bills up permanently has risen from 47.99% to 69.98% – a jump of +21.99 points. The "bills spike but settle back" view and the "world events matter less" view have both fallen. The share who don't think about how world events affect bills has dropped sharply, from 17.17% to 4.62%.

Segmentation by gender and age, 2026

Response option (2026)	UK	Men	Women	18-24	25-34	35-44	45-54	55-64	65+
Bills go up and never come back down	69.98%	70.17%	69.77%	50.48%	65.87%	73.37%	74.70%	74.33%	71.88%
Bills spike but settle back after a while	25.50%	25.63%	25.39%	34.29%	30.54%	19.53%	23.49%	24.52%	24.22%
World events matter less than people think – it's mostly government decisions	9.84%	9.24%	10.47%	25.71%	11.38%	10.65%	7.23%	6.51%	3.91%
They don't think about how world events affect their bills	4.62%	4.41%	4.84%	8.57%	5.39%	5.92%	4.22%	2.30%	3.91%

Segmentation by political party, 2026

Response option (2026)	UK	Conservative	Green Party	Labour	Liberal Democrat	Reform UK	Other
Bills go up and never come back down	69.98%	66.27%	75.90%	66.25%	70.80%	70.92%	71.43%
Bills spike but settle back after a while	25.50%	30.12%	20.48%	29.17%	27.43%	20.57%	22.56%
World events matter less than people think – it's mostly government decisions	9.84%	11.45%	10.84%	7.50%	7.08%	9.93%	10.53%
They don't think about how world events affect their bills	4.62%	4.82%	3.61%	4.58%	6.19%	3.55%	6.77%

A.5 Question 5

What do people in your social circle believe about investment in clean energy's impact on jobs and the economy?

UK total, across three time perspectives

Response option	2020	2026	2030
It creates jobs nationally and boosts the country's economy	30.62%	41.57%	43.57%
It creates jobs locally that benefit their community	19.58%	26.51%	28.71%
Most jobs go to other regions than theirs	22.69%	21.69%	18.37%
The level of job creation is exaggerated	24.50%	27.21%	25.30%
It eliminates more fossil fuel jobs than it can create	17.67%	16.16%	17.67%
There's no local economic benefit	26.10%	18.98%	18.67%

Belief in national job creation has risen from 30.62% to 41.57%, and belief in local job creation from 19.58% to 26.51%. The share seeing no local economic benefit has fallen from 26.10% to 18.98%, but remains just under one in five. Sceptical views (job creation exaggerated; eliminates more fossil fuel jobs than it creates) have held broadly steady.

Segmentation by gender and age, 2026

Response option (2026)	UK	Men	Women	18-24	25-34	35-44	45-54	55-64	65+
It creates jobs nationally and boosts the country's economy	41.57%	40.97%	42.05%	50.48%	49.10%	37.87%	40.36%	38.70%	36.72%
It creates jobs locally that benefit their community	26.51%	28.15%	24.81%	40.00%	37.13%	23.08%	25.30%	19.92%	21.09%
Most jobs go to other regions than theirs	21.69%	20.59%	22.67%	19.05%	17.96%	21.89%	25.90%	22.22%	21.88%
The level of job creation is exaggerated	27.21%	32.35%	22.48%	19.05%	28.14%	26.04%	27.11%	29.89%	28.91%
It eliminates more fossil fuel jobs than it can create	16.16%	16.60%	15.89%	11.43%	16.77%	15.98%	15.06%	16.09%	21.09%
There's no local economic benefit	18.98%	18.07%	19.77%	8.57%	13.77%	18.34%	24.10%	22.61%	21.09%

Segmentation by political party, 2026

Response option (2026)	UK	Conservative	Green Party	Labour	Liberal Democrat	Reform UK	Other
It creates jobs nationally and boosts the country's economy	41.57%	39.76%	53.61%	46.67%	41.59%	22.70%	36.84%
It creates jobs locally that benefit their community	26.51%	28.31%	37.95%	28.75%	23.89%	17.73%	17.29%
Most jobs go to other regions than theirs	21.69%	19.88%	18.07%	23.33%	25.66%	22.70%	21.05%
The level of job creation is exaggerated	27.21%	27.11%	22.29%	22.92%	25.66%	37.59%	30.83%
It eliminates more fossil fuel jobs than it can create	16.16%	19.88%	10.84%	13.33%	8.85%	26.95%	15.79%
There's no local economic benefit	18.98%	19.28%	15.66%	15.83%	17.70%	27.66%	21.05%

A.6 Question 6

Suppose that renewable energy generates more power than the grid can handle, what would people you know think would be the best solution?

UK total, across three time perspectives

Response option	2020	2026	2030
Upgrade the grid infrastructure to handle more capacity	30.72%	46.08%	45.18%
Build more power generation closer to where it's needed to reduce grid pressure	17.87%	21.79%	28.51%
Use smart technology to shift when people use energy	15.36%	32.23%	42.77%
Store excess energy and release it when needed	34.34%	56.83%	54.92%
Accept some renewable energy will be wasted	12.65%	9.94%	11.55%
Revert to a fossil fuel based system	9.44%	4.02%	4.62%
They don't know enough about grid constraints to say	33.73%	17.77%	13.45%

Storage leads at 56.83%, up from 34.34%. Grid upgrades sit at 46.08%, and smart technology to shift demand has more than doubled from 15.36% to 32.23%. Falling back on fossil fuels sits at 4.02%, down from 9.44%. The share saying they don't know enough about grid constraints has almost halved, from 33.73% to 17.77%.

Segmentation by gender and age, 2026

Response option (2026)	UK	Men	Women	18-24	25-34	35-44	45-54	55-64	65+
Upgrade the grid infrastructure to handle more capacity	46.08%	47.27%	44.96%	50.48%	53.89%	44.97%	42.77%	41.76%	46.88%
Build more power generation closer to where it's needed to reduce grid pressure	21.79%	21.22%	22.09%	35.24%	25.15%	23.67%	18.07%	18.01%	16.41%
Use smart technology to shift when people use energy	32.23%	32.35%	31.98%	30.48%	37.72%	28.40%	30.12%	28.74%	41.41%
Store excess energy and release it when needed	56.83%	56.30%	57.17%	39.05%	47.90%	52.07%	60.24%	64.75%	68.75%
Accept some renewable energy will be wasted	9.94%	10.71%	9.30%	16.19%	16.77%	11.24%	7.23%	7.66%	2.34%
Revert to a fossil fuel based system	4.02%	4.83%	3.29%	1.90%	4.19%	3.55%	3.61%	5.75%	3.13%
They don't know enough about grid constraints to say	17.77%	16.18%	19.19%	15.24%	17.96%	21.30%	16.87%	17.62%	16.41%

Segmentation by political party, 2026

Response option (2026)	UK	Conservative	Green Party	Labour	Liberal Democrat	Reform UK	Other
Upgrade the grid infrastructure to handle more capacity	46.08%	50.60%	49.40%	47.50%	45.13%	38.30%	42.11%
Build more power generation closer to where it's needed to reduce grid pressure	21.79%	23.49%	21.69%	21.67%	25.66%	17.02%	21.05%
Use smart technology to shift when people use energy	32.23%	30.72%	36.75%	39.58%	32.74%	22.70%	25.56%
Store excess energy and release it when needed	56.83%	62.65%	57.23%	55.00%	67.26%	48.23%	49.62%
Accept some renewable energy will be wasted	9.94%	7.23%	10.84%	11.67%	14.16%	7.80%	9.77%
Revert to a fossil fuel based system	4.02%	2.41%	2.41%	1.67%	2.65%	12.06%	5.26%
They don't know enough about grid constraints to say	17.77%	13.86%	19.88%	17.50%	13.27%	19.15%	21.05%

A.7 Question 7

What do people in your social circle believe should be the main consideration when thinking about our future energy needs?

UK total, across three time perspectives

Response option	2020	2026	2030
Paying less now even if that means paying more in the future	33.13%	25.70%	21.79%
Paying more now in order to ensure paying less in the future	17.07%	22.79%	20.98%
Managing visual impact	10.14%	10.84%	11.04%
Creation of new jobs and adding economic value	25.30%	31.43%	36.45%
Protecting existing jobs	29.42%	24.50%	28.71%
Supporting UK industry to remain competitive globally	26.81%	39.36%	41.57%
Reducing air pollution for future generations	26.61%	37.15%	42.37%

Supporting UK industry to remain competitive globally has risen from 26.81% to 39.36% – the fastest-rising of seven Q7 options. Reducing air pollution for future generations has also risen, from 26.61% to 37.15%. Visual impact is the lowest-ranked of seven Q7 options and has barely moved: 10.14% in 2020, 10.84% today, projected 11.04% in 2030.

Segmentation by gender and age, 2026

Response option (2026)	UK	Men	Women	18-24	25-34	35-44	45-54	55-64	65+
Paying less now even if that means paying more in the future	25.70%	26.05%	25.19%	23.81%	25.15%	26.04%	30.12%	25.67%	21.88%
Paying more now in order to ensure paying less in the future	22.79%	24.37%	21.32%	29.52%	30.54%	23.08%	22.29%	16.48%	20.31%
Managing visual impact	10.84%	11.76%	10.08%	17.14%	15.57%	11.24%	4.82%	9.58%	9.38%
Creation of new jobs and adding economic value	31.43%	30.88%	31.98%	43.81%	42.51%	30.18%	25.30%	29.12%	21.09%
Protecting existing jobs	24.50%	22.90%	25.97%	34.29%	28.74%	28.99%	19.88%	22.61%	14.84%
Supporting UK industry to remain competitive globally	39.36%	39.50%	39.34%	29.52%	32.93%	40.83%	36.14%	45.21%	46.09%
Reducing air pollution for future generations	37.15%	31.93%	41.67%	34.29%	37.13%	36.69%	42.77%	34.48%	38.28%

Segmentation by political party, 2026

Response option (2026)	UK	Conservative	Green Party	Labour	Liberal Democrat	Reform UK	Other
Paying less now even if that means paying more in the future	25.70%	23.49%	24.10%	25.00%	28.32%	25.53%	27.07%
Paying more now in order to ensure paying less in the future	22.79%	26.51%	23.49%	25.83%	22.12%	15.60%	20.30%
Managing visual impact	10.84%	12.05%	10.24%	12.08%	9.73%	10.64%	9.77%
Creation of new jobs and adding economic value	31.43%	27.71%	37.95%	35.00%	30.97%	26.24%	25.56%
Protecting existing jobs	24.50%	24.10%	27.71%	25.42%	15.93%	25.53%	22.56%
Supporting UK industry to remain competitive globally	39.36%	38.55%	33.73%	40.83%	37.17%	52.48%	37.59%
Reducing air pollution for future generations	37.15%	31.33%	56.02%	34.58%	46.02%	15.60%	40.60%

A.8 Question 8

What do people in your social circle think "green policy costs" on energy bills actually pay for?

UK total, across three time perspectives

Response option	2020	2026	2030
Support for new clean energy projects	28.51%	46.08%	46.99%
Helping low-income households with bills	9.94%	12.25%	17.67%
Funding government climate change programs	24.60%	38.05%	40.16%
Energy efficiency schemes for homes	18.17%	28.82%	35.54%
Upgrading the national grid infrastructure	12.25%	18.37%	25.90%
It's just extra profit for energy companies	22.89%	21.18%	21.08%
They have no clear understanding what it covers	39.06%	26.10%	19.88%

Understanding of where green policy costs go has improved. "Support for new clean energy projects" has risen from 28.51% to 46.08%. The share who think green policy costs are extra profit for energy companies has held roughly steady at 21.18%. The "no clear understanding" share has fallen sharply, from 39.06% to 26.10%.

Segmentation by gender and age, 2026

Response option (2026)	UK	Men	Women	18-24	25-34	35-44	45-54	55-64	65+
Support for new clean energy projects	46.08%	48.11%	44.19%	40.00%	53.29%	43.20%	48.80%	41.76%	50.78%
Helping low-income households with bills	12.25%	13.87%	10.66%	15.24%	19.76%	13.02%	12.65%	8.05%	7.03%
Funding government climate change programs	38.05%	39.71%	36.63%	29.52%	40.12%	34.91%	35.54%	42.91%	39.84%
Energy efficiency schemes for homes	28.82%	30.25%	27.52%	31.43%	31.74%	26.63%	31.93%	27.20%	25.00%
Upgrading the national grid infrastructure	18.37%	19.75%	17.05%	19.05%	22.75%	13.61%	15.66%	18.01%	22.66%
It's just extra profit for energy companies	21.18%	20.17%	22.29%	18.10%	19.16%	22.49%	23.49%	24.90%	14.06%
They have no clear understanding what it covers	26.10%	23.95%	27.91%	20.95%	19.76%	28.99%	28.92%	27.59%	28.13%

Segmentation by political party, 2026

Response option (2026)	UK	Conservative	Green Party	Labour	Liberal Democrat	Reform UK	Other
Support for new clean energy projects	46.08%	53.01%	50.00%	50.42%	52.21%	32.62%	33.83%
Helping low-income households with bills	12.25%	14.46%	12.05%	14.17%	12.39%	9.93%	8.27%
Funding government climate change programs	38.05%	39.76%	42.77%	40.00%	35.40%	38.30%	27.82%
Energy efficiency schemes for homes	28.82%	31.33%	31.93%	33.33%	36.28%	16.31%	23.31%
Upgrading the national grid infrastructure	18.37%	21.08%	21.08%	20.42%	21.24%	14.18%	10.53%
It's just extra profit for energy companies	21.18%	15.06%	24.70%	19.58%	15.04%	28.37%	24.06%
They have no clear understanding what it covers	26.10%	25.90%	22.89%	22.92%	22.12%	28.37%	36.84%

A.9 Question 9

What do people in your social circle understand by the words "energy transition"?

UK total, across three time perspectives

Response option	2020	2026	2030
Moving away from fossil fuels to clean energy	47.89%	69.08%	62.55%
Reaching net zero carbon emissions	18.37%	27.31%	39.36%
Making sure we have enough energy in the future	13.76%	13.25%	26.41%
Reducing dependence on imported gas and oil	16.37%	27.51%	33.73%
Transforming how we actually use energy (ie in heat and transport)	9.44%	14.36%	21.69%
Changing the amount of energy we use	9.24%	9.54%	16.37%
They're not sure what it means	33.53%	17.77%	13.96%
Marketing term for expensive green policies	8.73%	6.43%	6.83%

"Moving away from fossil fuels to clean energy" has risen from 47.89% to 69.08% – the dominant public association. The link to heat and transport – the two largest remaining decarbonisation challenges – is the weakest, at 14.36% (up from 9.44%). The "not sure what it means" share has almost halved, from 33.53% to 17.77%.

Segmentation by gender and age, 2026

Response option (2026)	UK	Men	Women	18-24	25-34	35-44	45-54	55-64	65+
Moving away from fossil fuels to clean energy	69.08%	71.43%	66.86%	62.86%	65.87%	63.91%	69.28%	70.50%	82.03%
Reaching net zero carbon emissions	27.31%	30.67%	24.42%	21.90%	37.13%	24.85%	30.12%	24.14%	25.00%
Making sure we have enough energy in the future	13.25%	12.82%	13.76%	17.14%	20.36%	14.20%	12.65%	9.96%	7.03%
Reducing dependence on imported gas and oil	27.51%	28.57%	26.74%	26.67%	28.74%	27.81%	25.90%	24.52%	34.38%
Transforming how we actually use energy (ie in heat and transport)	14.36%	12.82%	15.89%	18.10%	17.37%	15.38%	13.86%	11.49%	12.50%
Changing the amount of energy we use	9.54%	7.77%	11.24%	8.57%	14.37%	7.10%	11.45%	8.05%	7.81%
They're not sure what it means	17.77%	12.82%	22.09%	13.33%	15.57%	17.75%	20.48%	21.46%	13.28%
Marketing term for expensive green policies	6.43%	7.14%	5.62%	1.90%	5.99%	7.10%	3.01%	10.34%	6.25%

Segmentation by political party, 2026

Response option (2026)	UK	Conservative	Green Party	Labour	Liberal Democrat	Reform UK	Other
Moving away from fossil fuels to clean energy	69.08%	70.48%	72.29%	67.92%	72.57%	60.99%	69.17%
Reaching net zero carbon emissions	27.31%	30.12%	27.71%	27.92%	31.86%	17.02%	26.32%
Making sure we have enough energy in the future	13.25%	12.65%	15.66%	19.58%	8.85%	7.80%	9.77%
Reducing dependence on imported gas and oil	27.51%	31.33%	31.33%	29.58%	24.78%	20.57%	21.80%
Transforming how we actually use energy (ie in heat and transport)	14.36%	15.06%	15.06%	14.58%	15.04%	9.93%	15.04%
Changing the amount of energy we use	9.54%	7.83%	15.06%	9.17%	13.27%	4.96%	8.27%
They're not sure what it means	17.77%	12.65%	19.88%	15.83%	16.81%	21.99%	21.05%
Marketing term for expensive green policies	6.43%	4.22%	3.01%	3.75%	2.65%	17.02%	9.77%

A.10 Question 10

What do people in your social circle think the Government's "clean power by 2030" target means for energy production?

UK total, across three time perspectives

Response option	2026
100% renewable generation	36.24%
Renewables + nuclear generation	27.51%
Renewables, nuclear, gas with carbon capture and storage and hydrogen	22.79%
Mostly clean generation with some fossil fuel back up	23.09%
They've heard it but don't know what it means	20.98%

36.24% of the public believe the target means 100% renewable generation, and 27.51% say renewables plus nuclear. Only 23.09% identify the accurate description (mostly clean generation with some fossil fuel back up).

Segmentation by gender and age, 2026

Response option (2026)	UK	Men	Women	18-24	25-34	35-44	45-54	55-64	65+
100% renewable generation	36.24%	36.97%	35.47%	40.95%	44.31%	37.28%	37.35%	31.80%	28.13%
Renewables + nuclear generation	27.51%	34.24%	21.32%	31.43%	28.74%	19.53%	24.10%	28.74%	35.16%
Renewables, nuclear, gas with carbon capture and storage and hydrogen	22.79%	24.58%	21.12%	29.52%	22.75%	19.53%	19.88%	24.14%	22.66%
Mostly clean generation with some fossil fuel back up	23.09%	24.79%	21.71%	29.52%	25.75%	26.04%	19.88%	19.16%	22.66%
They've heard it but don't know what it means	20.98%	15.55%	25.97%	8.57%	17.96%	21.30%	22.29%	25.67%	23.44%

Segmentation by political party, 2026

Response option (2026)	UK	Conservative	Green Party	Labour	Liberal Democrat	Reform UK	Other
100% renewable generation	36.24%	43.98%	31.33%	33.33%	37.17%	37.59%	33.08%
Renewables + nuclear generation	27.51%	33.73%	25.30%	29.17%	36.28%	19.86%	18.05%
Renewables, nuclear, gas with carbon capture and storage and hydrogen	22.79%	27.71%	26.51%	24.17%	16.81%	12.77%	27.07%
Mostly clean generation with some fossil fuel back up	23.09%	16.87%	26.51%	26.67%	19.47%	21.28%	24.06%
They've heard it but don't know what it means	20.98%	16.27%	21.08%	20.83%	19.47%	26.24%	24.06%

A.11 Question 11

What % of GBs electricity was from clean sources (renewables + nuclear)?

Median estimate, all segments, three time perspectives

Year	UK	Men	Women	18-24	25-34	35-44	45-54	55-64	65+	Reform UK	Conservative	Liberal Democrat	Labour	Green Party	Other
2020	20%	30%	20%	30%	30%	20%	20%	20%	20%	20%	30%	30%	20%	20%	20%
2026	40%	40%	40%	50%	40%	40%	40%	40%	40%	50%	50%	50%	40%	40%	30%
2030	60%	60%	60%	60%	60%	60%	70%	60%	60%	60%	60%	70%	60%	60%	50%

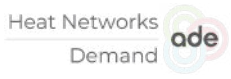
The median public estimate of the share of GB electricity from clean sources (renewables plus nuclear) is 40.00% today, up from 20.00% in 2020, and is projected to reach 60.00% by 2030.

A.12 Question 12

What proportion of an energy bill do people you know think is their energy supplier's profit?

Median estimate, all segments, three time perspectives

Year	UK	Men	Women	18-24	25-34	35-44	45-54	55-64	65+	Reform UK	Conservative	Liberal Democrat	Labour	Green Party	Other
2020	40%	30%	40%	40%	40%	30%	50%	30%	30%	40%	30%	30%	30%	40%	40%
2026	40%	40%	40%	50%	50%	40%	40%	30%	30%	40%	30%	40%	40%	50%	50%
2030	40%	40%	50%	50%	50%	50%	40%	40%	30%	50%	30%	40%	40%	50%	50%

The median public estimate of supplier profit as a proportion of the energy bill sits at 40.00%. The median has not moved across the three time perspectives: 40.00% in 2020, 40.00% today, 40.00% projected for 2030 – the only figure in the dataset with zero movement.

A research report commissioned by eleven leading UK energy trade associations: