POWER, PERCEPTION, AND PROGRESS

Public opinion, political trust, and navigating the next phase of the UK energy transition

GRAYLING
creating advantage

Welcome to Grayling UK's new energy trends report: Power, Perception, and Progress, 2025.

This report explores a UK-wide analysis of public attitudes towards the government's key energy reforms, including the transition to net zero and its flagship Clean Power 2030 target.

It includes exclusive research with 2,000 members of the public - conducted across all demographics and regions in the UK - that reveals striking insights into the challenges facing the Government and its clean energy ambitions.

The report highlights that the next phase of the UK energy transition is fraught with growing and increasingly complex political and social fault lines that are emerging at a time when both the energy and political systems must deliver faster, at greater scale, and with more public visibility than ever before.

It's clear from the research that the public overwhelmingly supports the energy transition, but they do not believe that this Government can deliver its promises, demanding a reset. It is our view that this needs to be anchored in economic opportunity, local control, and national resilience, and critically - engages local communities across the country.

For the Government, doing so would not only build trust and confidence but unlock support from those who feel left behind. The path forward shouldn't be any less ambitious – but it demands smarter framing, better engagement, and clearer benefits.

As energy experts, we want to support clients, the Government, and key stakeholders in this transition. That is why Grayling provides integrated energy communications support to ensure we are offering clients the most effective and specialised 360 service to navigate this environment, drawing on our unrivalled UK-wide talent and expertise.

We hope that you find the report a stimulating and informative read. And, of course, if you would like to discuss the findings in full or explore how Grayling can support your organisation, please do not hesitate to get in touch.

Thank you,

Heather Blundell,
UK CEO, Grayling UK

Executive Summary

The UK's energy transition is at a turning point. Public support for clean energy remains strong but increasingly conditional. Grayling's polling shows affordability, fairness, and energy security now dominate public priorities, while belief in the achievability of power decarbonisation is declining.

Across the country, regional trust in the transition is fragile. While London voters remain optimistic, regions like the North East and Wales are more sceptical - citing unfairness and a lack of local benefit. Jobs and visible community value are key to turning support into consent.

The political narrative is shifting, with growing calls for a more grounded, delivery-focused approach, while grid challenges and investment needs continue to dominate the discussion.

The challenge ahead is not ambition but delivery. To maintain trust, industry and government must embed fairness, resilience, and local engagement at every stage. This report sets out how - bridging national targets with regional realities and turning support into lasting social licence to operate.

SECTION 1:
THE ENERGY TRILEMMA STRIKES BACK

Balancing Act: What the Public Wants From the Energy Transition

The UK's energy transition retains broad public backing, but that support is under strain. As net zero becomes more polarised, it's easy to be led by headlines and harder to separate public sentiment from political rhetoric. Grayling's May 2025 polling finds that people continue to prioritise three things above all: secure energy supplies, affordable bills, and clean power generation and use.

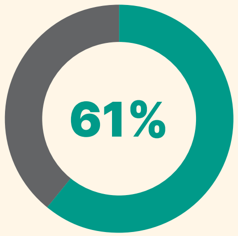
These are the core pillars of the energy trilemma and while 61% of the British public support the UK's 2050 net zero target (YouGov, 18 March 2025), our new data shows that this support begins to fracture as soon as trade-offs become visible.

While our polling shows strong public demand for cheaper bills, the affordability crisis is primarily driven by volatile global gas markets - not net zero targets. Though renewables can offer price stability and reduce exposure to gas shocks, they may not significantly cut electricity prices on their own. Consumer bills are shaped by multiple factors - contract structures, grid costs, and levies - not just wholesale markets.

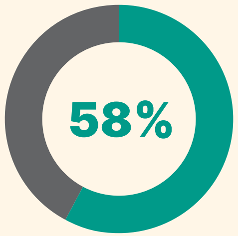
What does this mean for government and business? Clear communication is now essential, as affordability and fairness set the boundaries of public consent for the energy transition.

What the Public Will and Won't Accept

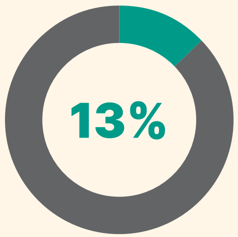
Grayling's data shows a public ready to endorse change, but increasingly sceptical about how the transition is being delivered:



Affordability still dominates:
61% say cutting household energy bills should be the top priority for government energy policy - more than double the number prioritising decarbonisation (25%).



Energy security now outranks climate action among respondents:
58% would accept a delay to net zero targets if it helped avoid blackouts, as seen on the Iberian Peninsula in April 2025, or further price rises.



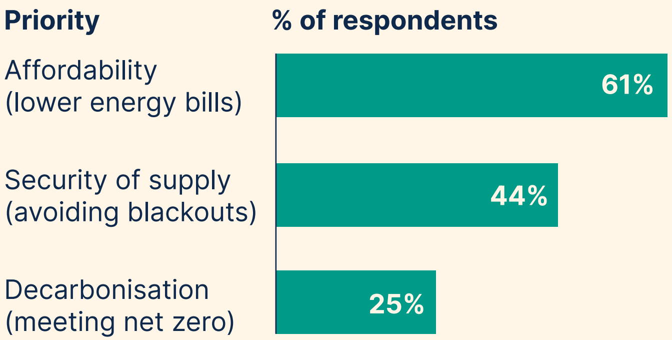
Concerns regarding fairness are strong:
Just 13% believe the energy transition is being delivered fairly across the UK. This sentiment is most pronounced in the North East and Wales, where voters feel least confident that their regions and communities are benefiting from investment in infrastructure.

These are issues we've been tracking for several months, and our latest barometer shows they're becoming more acute in the public's mind. In key regions, perceptions of exclusion are no longer passive - they're actively shaping attitudes toward infrastructure, investment, and planning.

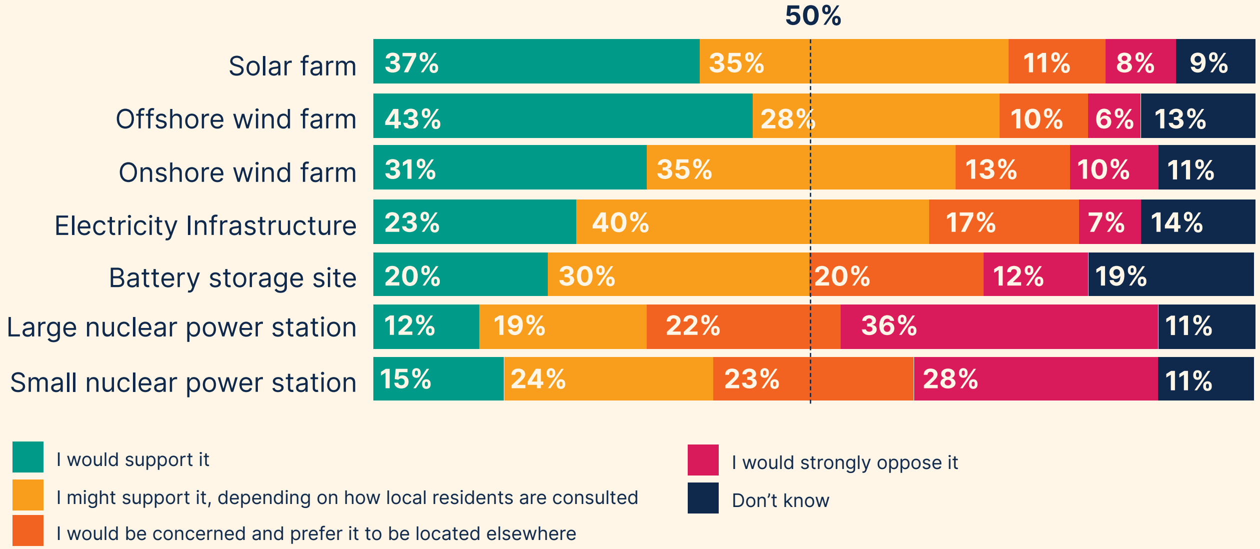
Grayling online surveys of 1,750 English respondents (Feb 2025) and 2,000 nationally representative respondents (May 2025).

How the Public Ranks the Trilemma

When asked to prioritise the three pillars of the energy system:



Technology Type Matters



Even among climate-conscious younger voters (18–34), **56% still ranked affordability ahead of net zero - suggesting a durable economic lens across demographics.**

Support for individual technologies varies - especially when people are asked to consider local impacts. While offshore wind remains broadly popular, **just 31% of respondents strongly support new onshore wind developments near their homes**. Solar performs better, with 37% backing new local installations, despite recent political commentary suggesting that there is significant public concern about this technology's impact on agricultural land, rural character, and UK food security.

Perhaps most surprising is the relatively dynamic support for new nuclear. While often contentious, our polling shows that 24% of respondents would support new small-scale nuclear in their own region if consulted, and 19% for large-scale nuclear. This highlights sensitivities to large infrastructure development and demonstrates that early and active engagement can narrow the gap between opposition and consent.

Similarly, when people play an active role in decision-making, it shapes their thinking. Support for many technologies – including battery storage, hydroelectric / pumped hydro, and grid infrastructure (pylons and substations) rises with adequate consultation. A common answer across all technologies: "I might support it, depending on whether I'm consulted."

This is not a NIMBY problem. **It is a process and communication problem**. While the Government is undertaking reforms to streamline planning processes, public support is increasingly conditional, not automatic. They are demanding a greater say in the development of new energy infrastructure in their area, along with reaping the benefits of hosting these assets.

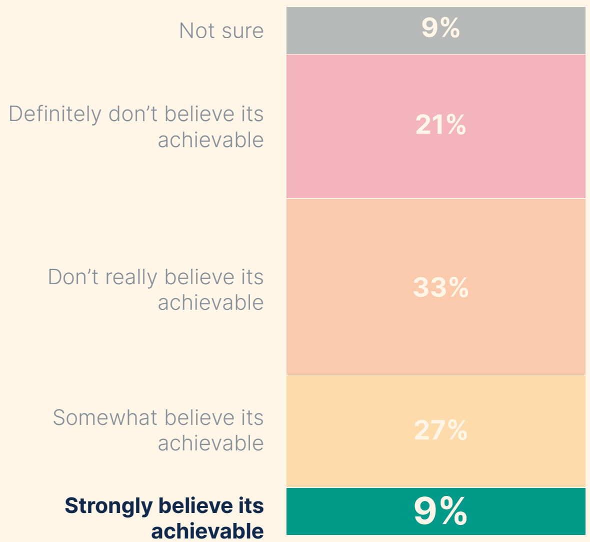
Grayling online surveys of 1,750 English respondents (Feb 2025) and 2,000 nationally representative respondents (May 2025).

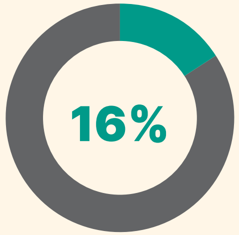
Low Public Confidence in Clean Power 2030

Despite headline support for net zero and tackling climate change, belief in the achievability and benefits of delivery in practice is strikingly low

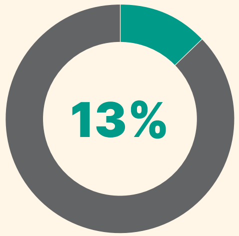
Only **9%** of respondents strongly believe the Government's Clean Power 2030 target is achievable.

The Government aims to fully decarbonise our power system by 2030. To what extent do you believe this goal is achievable?





Just **16%** believe it will benefit their specific region



Only **13%** think the costs and benefits of the transition will be shared fairly

> Public engagement must go beyond one-way communication - two-way dialogue is essential to secure buy-in and make policies deliverable.
>
> **- The Seventh Carbon Budget, Climate Change Committee (2025)**

> The energy transition requires an honest conversation with people across the country about both the challenges and the benefits. The scale of the challenge means that we have to bring the public with us on this journey.
>
> **- Energy UK, Energy Matters: People, Power, Prosperity, October 2023**

Setting the Stage: From National Doubt to Regional Demand

Our February 2025 polling of the English public highlighted a deeper tension: a striking lack of faith in government and political parties' ability to achieve policy outcomes, such as lower energy costs.

This has fuelled a growing desire for targeted regional investment, greater local control and community control over energy policy and projects.

Ahead of the 2025 Local Elections, it was clear that the English public's belief in politicians having the answers to delivering the energy transition was low:

- **52%** believed that no political party knows how to achieve lower energy bills
- **43%** that no political party knows how to achieve energy independence
- **44%** that no political party knows how to achieve reduced carbon emissions

That sentiment now underpins the next two sections - where we examine the political shifts reshaping the national conversation, and the regional differences that will determine whether the transition secures true public consent.

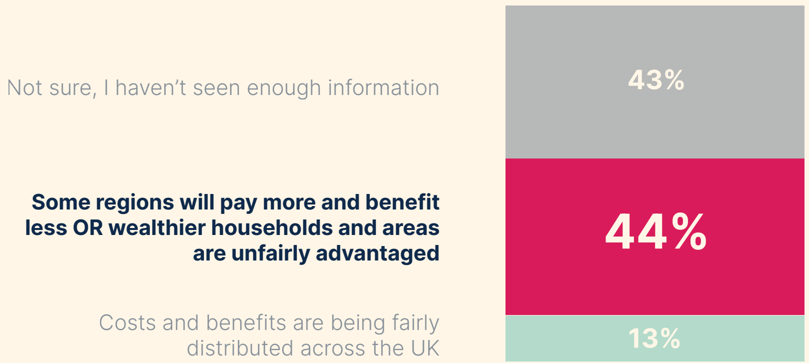
Grayling online surveys of 1,750 English respondents (Feb 2025) and 2,000 nationally representative respondents (May 2025).

SECTION 2:
NET ZERO DEBATE AND SOCIAL FAULT LINES

The Fracturing Consensus

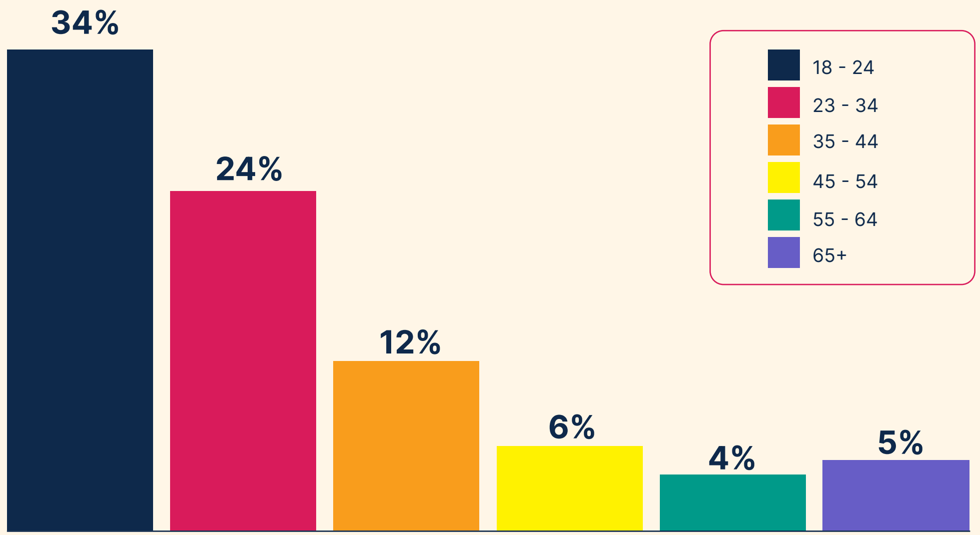
The once-stable consensus around net zero has begun to splinter. While public support for climate ambition remains high in principle, the political and economic framing of the transition is now a battleground. Parties that once competed to lead on green targets are realigning around affordability, fairness, and control.

To what extent do you the costs and benefits of the UK's clean power and energy transition goals are being shared fairly across the country?



44% of the public believe others will gain more from the energy transition while they are left to pay the price.

With support strongest in London, there's a growing sense that net zero is being shaped by a wealthier political class living in a different energy reality - one of belief, benefit, and insulation from trade-offs. Elsewhere, the picture is defined by uncertainty, cost, and limited control.



Believe the costs and benefits of the UK's clean power and energy transition goals are being shared fairly across the country

The generational divide reinforces this. Younger voters - more likely to back the transition are also more likely to be shielded from its financial consequences. Older people face rising energy costs, often compounded by the 2024 decision to restrict the Winter Fuel Payments.

This isn't ideological backlash. It's part of a broader fracturing of the net zero consensus across multiple social fault lines – now reflected in the rise of Reform UK, the Conservatives' rhetorical shift, and Labour-aligned voices urging a more grounded, economically driven, reset.

Grayling online surveys of 1,750 English respondents (Feb 2025) and 2,000 nationally representative respondents (May 2025).

Reform, Realignment, and the Political Moment

Reform UK's surge in the 2025 Local Elections didn't emerge in isolation. Its messaging on energy bills, infrastructure siting, and national self-reliance cut through where legacy parties failed to connect abstract policy with lived experience. Its strength in previously safe Conservative areas and Labour's traditional heartlands forced a recalibration even before the election.

Kemi Badenoch MP's March 2025 speech, casting net zero as a "state diktat built on pretend statistics," was a bellwether moment and a direct rebuke to the Conservatives' earlier green leadership. Badenoch's remarks drew sharp lines around sovereignty, affordability, and overreach, attack lines foreseen and amplified by Reform UK's own place-based strategy.

Criticism has also emerged within Labour, with some warning that non-tangible targets like Clean Power 2030 risk alienating workers and regions already distrustful of Westminster-led transitions.

> There will be many benefits from the transition to net zero but the choices we make in getting there must be better than those offered by the false prophets of climate fundamentalism and diversionary populism.
>
> **- Gary Smith, General Secretary, GMB Union, writing in The Times, 5 May 2025**

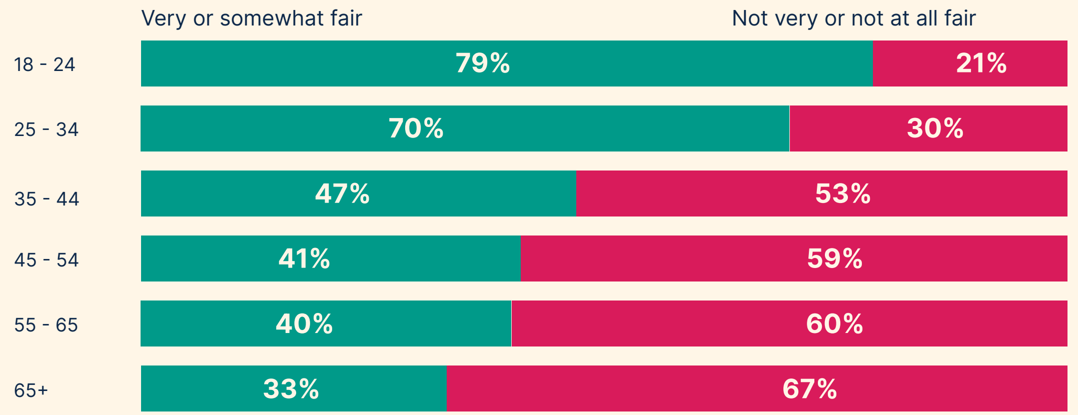
Even Labour-leaning think tanks have echoed this. The Tony Blair Institute's (TBI) 2025 Climate Paradox report urged politicians to recast net zero as an industrial and economic mission - not a moral crusade.

These interventions underscore a growing divide within the broader Labour movement. Trade unions are pushing for a more job-led, regionally grounded approach, while voices like the TBI are calling for a full economic reframing and a slower approach. These signals point to a movement under pressure and a mission in need of new narrative foundations.

A Sector Out of Sync

While the narrative has shifted, government and much of the energy sector are focused on mechanics like market reform, grid connections, and spatial planning. These are vital, but risk sounding tone-deaf. **Even the potential implementation of zonal pricing reveals a social divide:** younger people are more open to it, while older groups - concerned about affordability - remain opposed.

Support for Zonal Pricing is Proportionally Higher in Younger Age Groups



It's clear that our polling shows a widening public disconnect, between the energy transition and its benefits.

Trade Off: New Skilled Jobs in Clean Energy v Protecting Existing Jobs in Traditional Energy

While only 9% of the public strongly believe Clean Power 2030 is achievable, **60% say they prioritise creating new skilled jobs in clean energy and low-carbon industries over protecting legacy sectors like oil and gas.**

Grayling online surveys of 1,750 English respondents (Feb 2025) and 2,000 nationally representative respondents (May 2025).

The prioritisation of new, green, jobs demonstrates that the public may doubt the transition - but still want the benefits of the outcome.

This is the opening for a narrative reset for the major parties. The energy transition reframed not as 'warp speed decarbonisation' but as a measured national growth enterprise that brings regions and communities on the journey, can regain momentum. The focus must shift from abstract targets to tangible economic benefits - skills, employment, and regeneration.

A Moment for Reset, Grounded in Economic Growth

The cracks in the political consensus are not fatal - but they are widening. And they're emerging at a time when both the energy and political system must deliver faster, at greater scale, and with more public visibility than ever before.

The fallout from the Winter Fuel Payment reform added to this pressure. After facing strong criticism and poor local election results, the Government changed course, confirming that over three-quarters of pensioners will regain access to the scheme. This is more than a policy U-turn. It's a signal that the social contract underpinning the energy transition remains negotiable. Therefore, reforms like zonal pricing must be carefully weighed against negative impact - even at the cost of political capital. While recent announcements on nuclear and carbon capture at the Spending Review demonstrated renewed ambition, the challenge remains aligning policy design with public trust.

There is still time to fully reset the narrative around the transition and all eyes will be focused on clean energy policies and the Industrial Strategy that are due to be published at the end of June. Clearly, the narrative for these plans and further policies must be anchored in economic opportunity, local control, and national resilience. For Labour, doing so would not only bring the public back on the journey but also more closely align with its Growth Mission and unlock support from those who feel left behind.

The path forward isn't less ambition - it's smarter framing, better engagement, and clearer benefits.

Section 3 explores this challenge in practice - showing how public consent for infrastructure, investment, and energy planning now hinges on regional perception and political trust.

SECTION 3:
GRAYLING'S VANTAGE POINT – THE LOCAL LENS

No Single Public - Just a Patchwork of Energy Realities

The fracturing political consensus is often intensified at the regional level, where perceptions of fairness, control, and benefit vary. **Grayling's polling reveals a deeply regionalised picture: in London, optimism runs high, while in Wales and Yorkshire, scepticism dominates.** These are not superficial differences. They reflect how communities experience the transition and infrastructure development - in terms of visibility, investment, fairness, and voice.

Confidence grows where clean energy investment is visible and linked to regional gain. Where infrastructure arrives without consultation or clear benefit, trust erodes. This underscores the importance of coordinated planning through the Strategic Spatial Energy Plan (SSEP) from the perspective of local economic as well as energy system benefits.

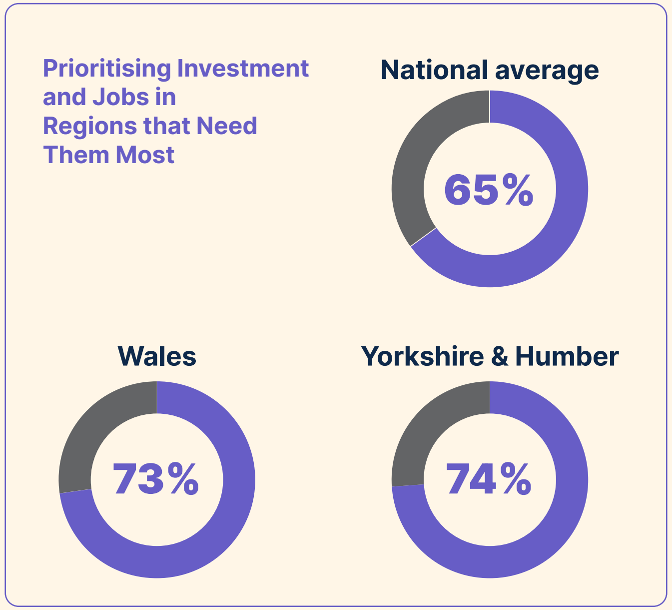
Building upon the SSEP, the Regional Energy Strategic Plan (RESP) introduces a new model for devolved energy planning - designed to support locally driven energy strategies informed by need, geography, and consent. Alongside proposals to potentially expand mandatory community benefits and shared ownership of clean energy generation - particularly in infrastructure-hosting areas - this marks a shift toward fairer, more inclusive delivery and local communities' hosting of assets.

Converting Regional Sentiment into Opportunity

For developers, local planners, infrastructure funds, and government, the pathway to public consent lies in building long-term, regional and place-based partnerships - not transactional interventions that risk being seen as value extractive.

Regional trust is fragile. Support must be built through fairness, visibility, and shared local value. Polling shows stark regional differences in perceived benefit - only 10% in the North East vs 23% in London think distribution of costs and benefits will be fair. Delivery must close these confidence gaps.

Local input drives consent. Consultation transforms scepticism into support. In Wales and Yorkshire, where fairness concerns are sharpest, 70%+ want greater regional prioritisation when it comes to investment. Devolved planning, non-statutory engagement, and community-led delivery should not be viewed simply as processes - they are strategic necessities.



Jobs are the unifier. Across every region, job creation in clean energy outperforms any other policy narrative. Even in resistant regions like the South West, employment-focused framing softens opposition and rebuilds trust in transition.

Messaging must be place-led. From Land's End to the Shetlands, regional language matters. Framing must shift from targets and timelines to local pride, resilience, and tangible local gain. A one-size-fits-all narrative for the energy transition may erode consent.

Grayling online surveys of 1,750 English respondents (Feb 2025) and 2,000 nationally representative respondents (May 2025).

THE REGIONAL REALITY

Scotland

- 21% believe they will benefit from the transition
- Strong support for offshore wind and jobs
- High trust in devolved decision-making

Scotland sees itself as a net winner of the transition. Devolution and infrastructure history create confidence, with strong support for local control - especially around jobs. But that support is conditional: benefits must be visible, locally retained, and politically relevant, with the 2026 elections looming as a potential flashpoint for energy issues.

North West

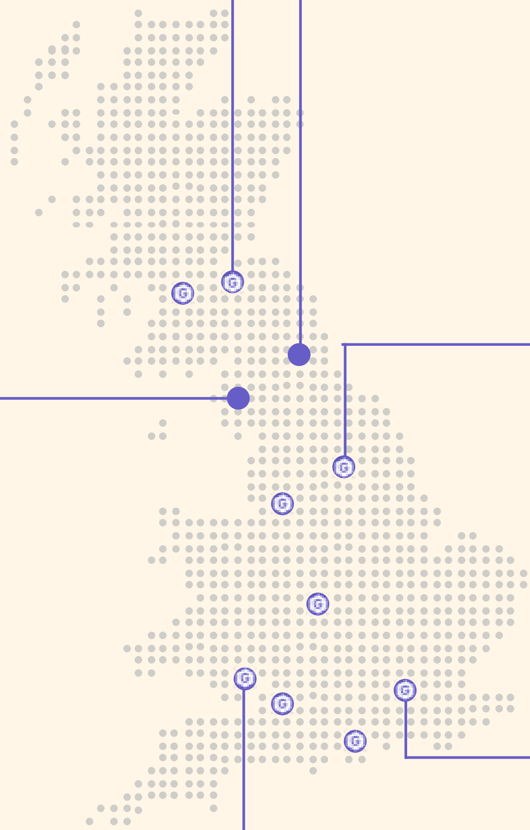
- Only 12% believe their region will benefit (vs. 16% UK average)
- One of the lowest fairness scores nationally
- High concern about affordability

The North West is deeply disconnected from the national transition narrative. However, support for clean energy jobs remains strong. Building trust here requires visible economic impact and early-stage community engagement. Stronger regional representation in planning decisions could help reverse disengagement.

Wales

- 35% say the transition will definitely not benefit their region
- 81% want more control over energy costs (highest in UK)
- 61% want more devolved say in energy decisions (highest in UK)
- Low belief in fairness and achievability

Wales reflects the sharpest fairness backlash. Support depends on visible benefit and active local participation, including the use of Welsh language by developers. Without this, Wales risks becoming a flashpoint for infrastructure resistance.



North East

- 18% believe the region will benefit
- Strong support for job creation, weak confidence in fairness
- Moderate desire for local control (60%) (vs. 59% UK average)

The North East holds latent support but wants proof. Messaging should focus on legacy industrial revitalisation and job-led growth. Follow-through on infrastructure commitments and inclusion of community voices will be critical to shifting scepticism to support.

Yorkshire & Humber

- 74% want regional prioritisation for investment in energy infrastructure and jobs
- High preference for regional job investment

Yorkshire is pragmatic. Scepticism is driven by absence of local benefit. Messaging should emphasise jobs, investment, and local control - not national targets. Strategic plans must align with local economic identity to gain traction.

London

- 21% believe their region will benefit
- 63% support helping people switch to clean technologies, like heat pumps, as a government priority (vs. 53% UK average)
- 74% prioritise creating new clean energy jobs over protecting existing industries (vs. 60% UK average)

London stands out as the only region where belief in Clean Power 2030, perceived benefit, and fairness converge. Voters here are younger, wealthier, and more exposed to clean energy messages. However, this creates risk: policymakers may mistake London's support for a national mandate.

Grayling online surveys of 1,750 English respondents (Feb 2025) and 2,000 nationally representative respondents (May 2025).

THE REGIONAL REALITY

West Midlands

- 14% believe in regional benefit
- High support for job-led transition
- Fairness and control concerns slightly above average

The West Midlands is open to clean energy if framed as economic renewal. Messaging should tie infrastructure to local jobs and community opportunity. Cultural relevance and delivery credibility are key levers for acceptance.

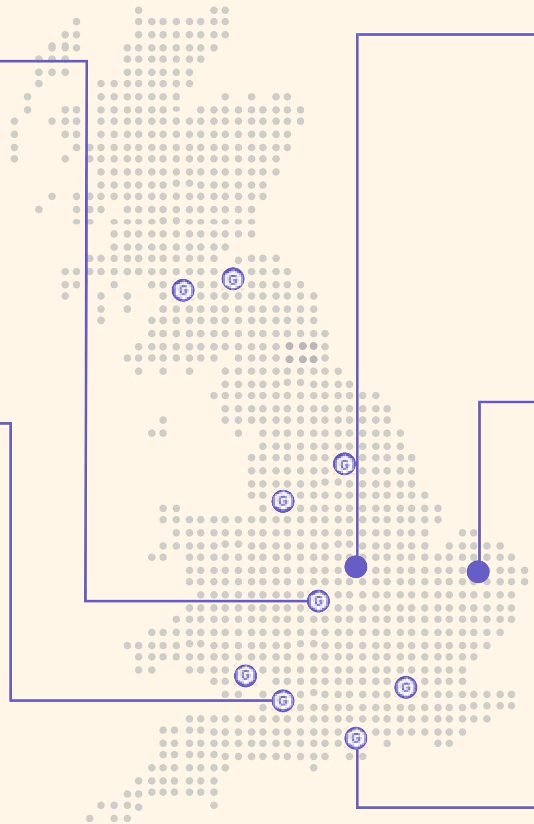
South West

- 16% believe their region will benefit
- Held the highest opposition to zonal pricing (60%)
- High concern about regional fairness

The South West is resistant and rural. Community engagement must be early, respectful, and grounded in tangible benefit. Project partners must address trust deficits stemming from perceived external imposition.

Grayling's UK Offices:

- Birmingham
- Bristol
- Cardiff
- Edinburgh
- Glasgow
- Leeds
- London
- Manchester
- Southampton



East Midlands

- 32% believe their region will not benefit
- 68% believe government should prioritise investment and jobs in their region, rather than focusing on driving national-level growth
- Moderate desire for community say, in line with national average

The East Midlands is one of the most resistant regions. To build consent, engagement must lead. Local benefit must be visible before infrastructure is introduced. National actors must address perceived asymmetry in resource distribution.

East of England

- 14% believe their region will benefit
- Holds a higher-than-average opposition to zonal pricing (57%) (vs. 51% UK average)
- Preference for local planning powers in line with average (61%)

The East is protectionist and sceptical. Support must be earned through transparency, low disruption, and benefit guarantees. Projects must demonstrate sensitivity to place and respect for existing land use.

South East

- 14% believe the region will benefit
- 60% prioritise having a say in how and were energy projects are built, over national level planning
- Higher than average fairness concerns

The South East is conflicted. It supports infrastructure but doubts fairness. Messaging must show how investment and benefit are shared. Delivery should reflect suburban sensitivities and prioritise visible local return.

Grayling online surveys of 1,750 English respondents (Feb 2025) and 2,000 nationally representative respondents (May 2025).

SECTION 4:
FROM INSIGHT TO ACTION

The energy transition isn't happening in a vacuum. It's unfolding against rising cost pressures, widening regional divides, and growing public scepticism.

Capital is flowing rapidly into energy transition assets, and the UK stands to benefit due to its clear policy frameworks and efforts to maintain an investor-friendly market. But these alone won't deliver the transition. Projects must be underpinned by consistent delivery capacity and political and social licence.

The sector faces a pivotal challenge: deploying infrastructure at pace in communities that often feel overlooked. That means aligning capital with outcomes people care about - jobs, affordability, and regeneration - and embedding long-term accountability into development and deployment.

To move from investment to delivery, energy companies must do more than consult. They must co-design, stay embedded, and prove their value. **Political and local consent must be earned early and upheld consistently. It's not a communications add-on. It's the foundation of clean growth.**

> "Clean Power 2030 is a key milestone, but it must come with a step-change in delivery and clearer communication of the benefits. Hitting our 2050 net zero target means ramping up deployment across all low-carbon technologies, fast. In 2023, we added just 3GW of clean power - well short of the 11.3GW needed each year to stay on track. **The message is clear: ambition isn't the issue, delivery and public confidence are.**
>
> **- Sam Hollister,**
> **Head of UK Market Strategy, LCP Delta**

Delivering Trust, Not Just Infrastructure

The challenge today is not public belief in the need for clean energy - it's public belief that this infrastructure delivers for them. Businesses, investors, and political leaders must consistently demonstrate fairness, local benefit, and credibility

That means showing how investment leads to better jobs, lower bills, and regeneration in overlooked communities. It means shifting from extractive to embedded - partnering with regional stakeholders and local people, not just informing them. And it means that communications, policy, and delivery teams must work together to make projects not only viable, but valued.

The Grayling Offer

At Grayling, we help clients earn permission to develop, deploy, and operate.

Across the UK, we bring together insight, strategy, and storytelling to help businesses and institutions navigate the energy transition with political credibility and public trust. This is combined with data adding local nuance, strategic planning with cultural awareness, and ambition with empathy.

We partner with developers, government agencies, infrastructure investors, and utilities to:

- **Corporate Affairs:** Create reputational and commercial advantage through executive profiling, corporate campaigns, and ESG communications.
- **Public Affairs:** Deliver integrated campaigns, secure government funding, and drive policy change, along with navigating political scrutiny.
- **Planning:** Engage with communities on major TCPA and NSIP projects, including managing the complex DCO process from consultation to consent.
- **Insights:** Undertake and combine data / social media intelligence and primary research to scrutinise audiences and the context they and their competitors operate in.
- **Creative:** Develop clear and attractive imagery, audio-visual, and design materials to transform technical concepts that support clear, compelling public-facing narratives and campaigns

Want to understand what your stakeholders think - and what they'll support? Talk to us about how Grayling can support your business.

REPORT AUTHORS

Rachel Rowlinson
Senior Research
& Insights Director, Grayling

James Watson
Senior Account Director
& Energy Policy Lead, Grayling

REPORT CONTRIBUTORS AND DESIGN

Dom Desmond
Head of Studio, Grayling

Sam Hollister
Head of UK Market Strategy, LCP Delta

ACKNOWLEDGMENTS

Alan Boyd-Hall
Head of Public Affairs, Grayling

Matthew Revett
Director, Grayling Scotland

Sian Jones
Director, Grayling Wales

Rachel Barrett
Director, Grayling

Guy Warman
Director, Grayling

Romilly Dennys
Director, Grayling

Lily Downes
Senior Account Director, Grayling

Marcus Boyle
Senior Account Executive, Grayling

Shuqi Tang
Designer, Grayling Asia

GRAYLING
creating advantage

CONTACT US

+44 20 3861 3750
INFO@GRAYLING.COM