

UK Net Zero appetite in a time of political and economic turbulence: the status of the social licence for the energy transition

UK Energy Security & Markets Winter Review – Westminster Energy Forum

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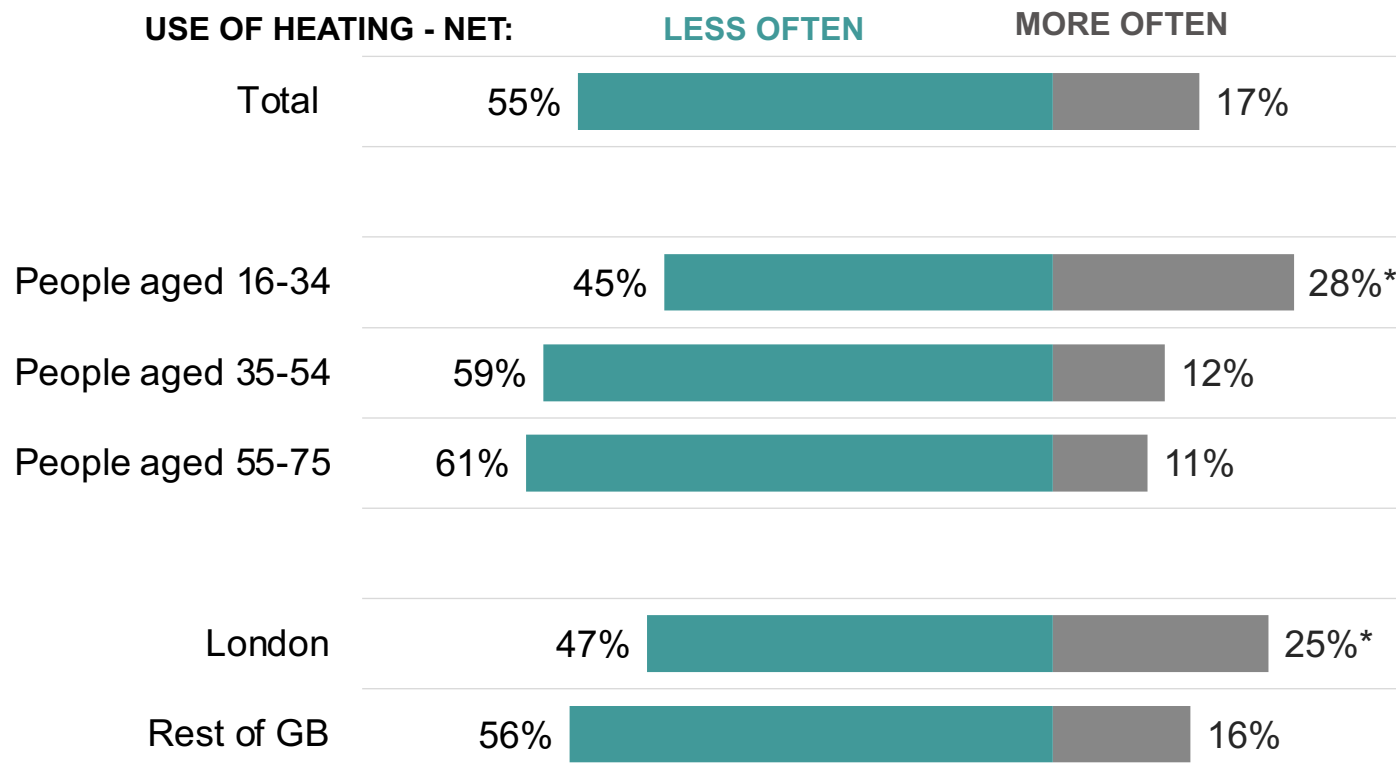
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01

Energy security: Public response

The UK public presents a restrained approach towards the use of heating. Over half (55%) reported that they used their heating less often this Winter



Base: 2168 UK adults aged 16-75 27 Jan – 29 Jan 2023.
Q: Q: This winter (2022-2023), have you used your heating less often than in previous winters, more often, or about the same amount?

1 in 2 are frequently or always cold while inside their own homes.

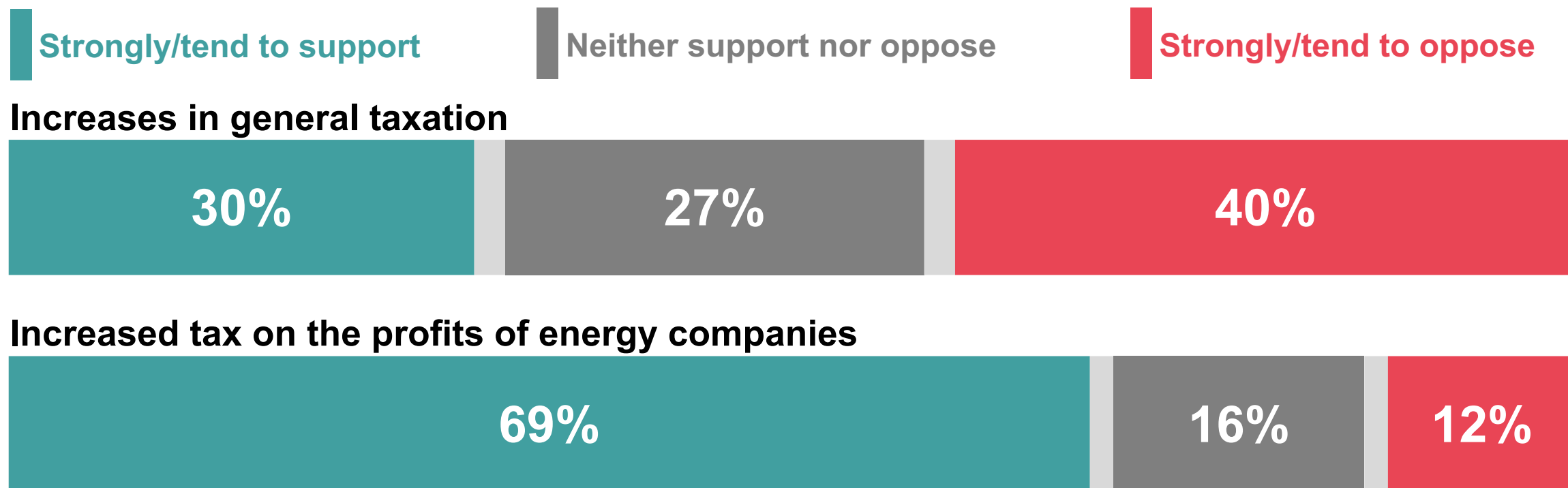
How often, if at all, have you felt cold while inside your home this winter (2022-2023)?



Base: 2,168 Online British adults aged 16-75, 27th – 29th January 2023

There is widespread support for the creation of a ‘social tariff’ paid for by increased tax on the profits of energy companies – with opinion split if it meant increases in general taxation.

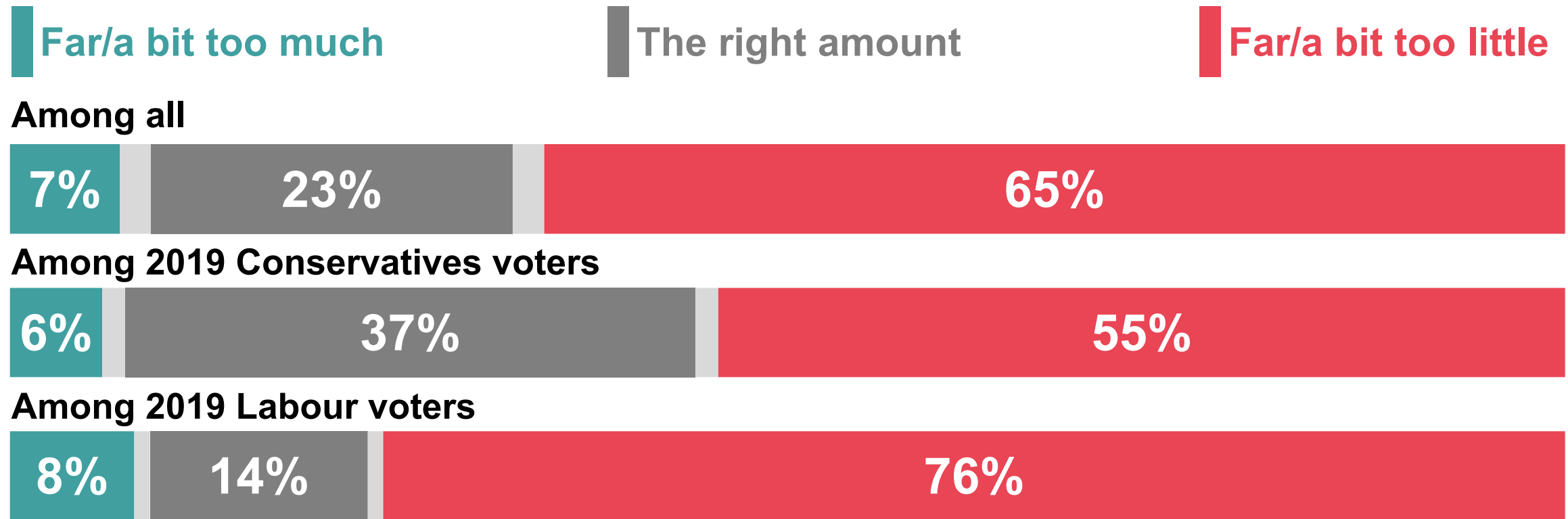
Some people have suggested that energy bills should be capped for vulnerable people, paid for by a ‘social tariff’ funded through taxation. To what extent would you support or oppose vulnerable people having their energy bills capped through...?



Base: 2,168 Online British adults aged 16-75, 27th – 29th January 2023

2 in 3 think the British government has done too little to combat the cost of energy in the UK.

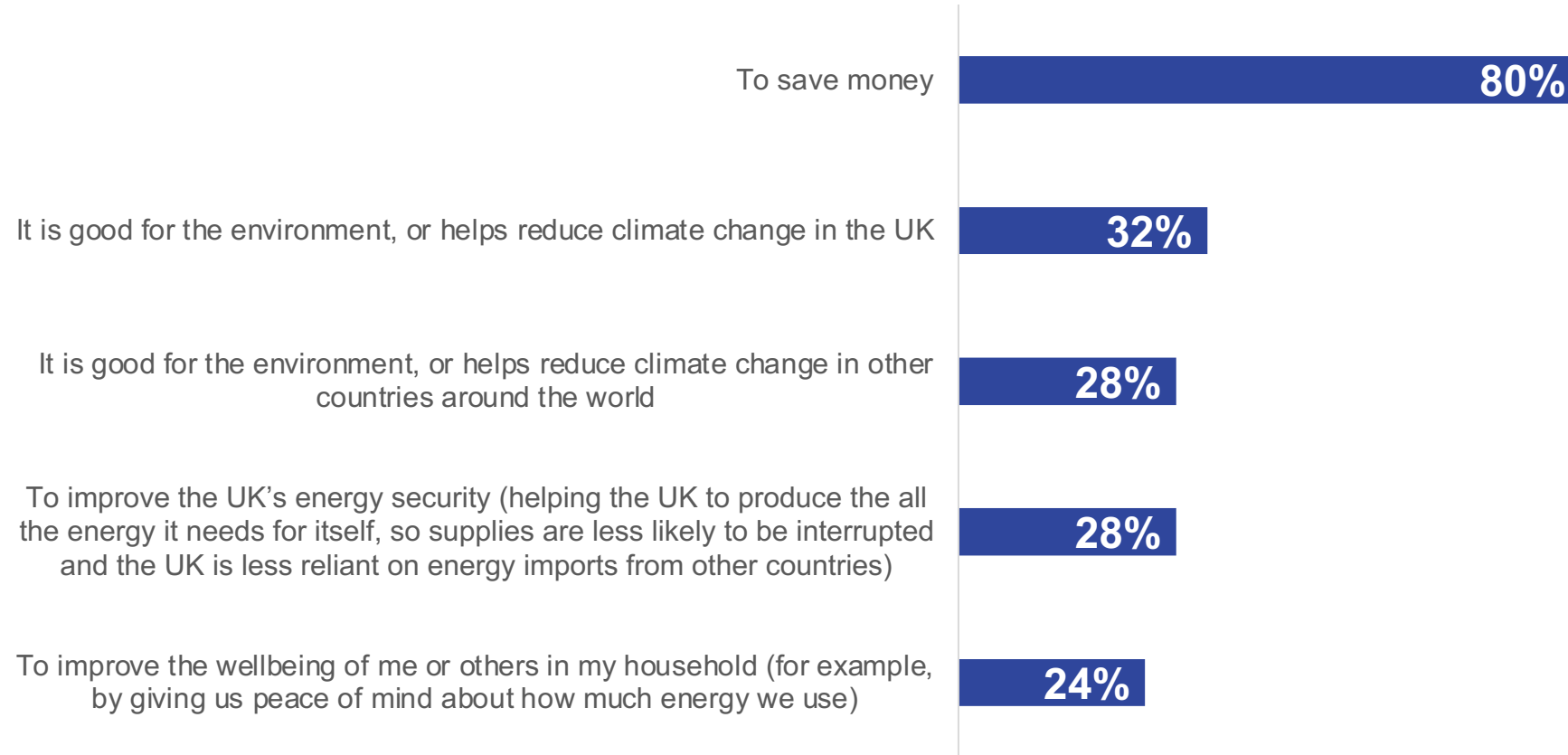
Thinking about the efforts of the British government to combat the cost of energy in the UK, do you think they've done too much, not enough, or the right amount?



Base: 2,168 Online British adults aged 16-75, 27th – 29th January 2023, including 2019 Conservative voters (630) and 2019 Labour voters (580)

Cost cutting is the most common reason for saving energy – but the environmental benefits are also a key consideration

Reasons for saving energy at home



Q. Thinking about why your household might want to save energy at home, which, if any, of the reasons shown below most apply to your household?

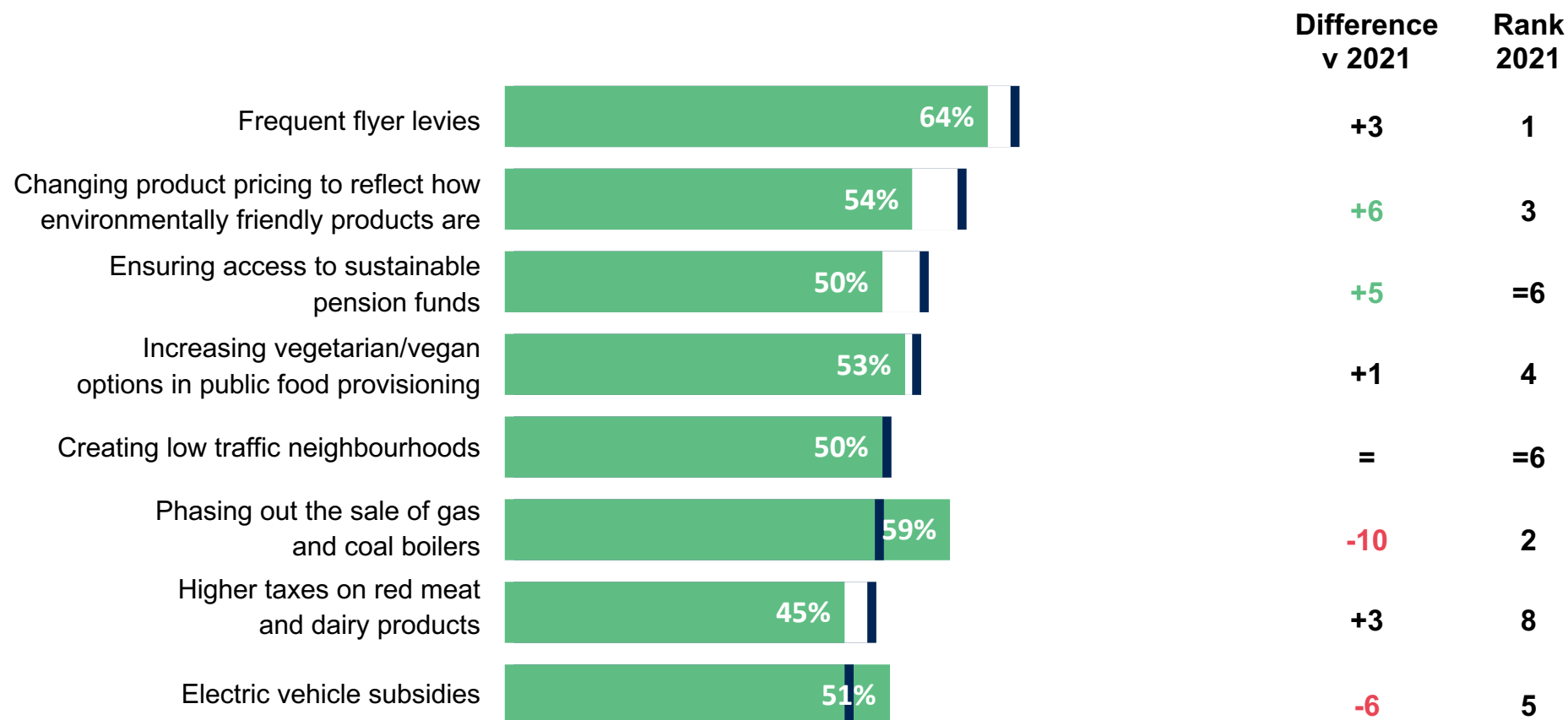
Base: 951 Online British adults aged 18-75, who are reducing energy usage and / or receiving or searching for advice on how to, 1st – 4th November 2022. NB: Don't know / Prefer not to say not shown

02

Public's view on Net Zero policies

Most net zero policies continue to enjoy broad support among the UK public

#NetZeroLiving`

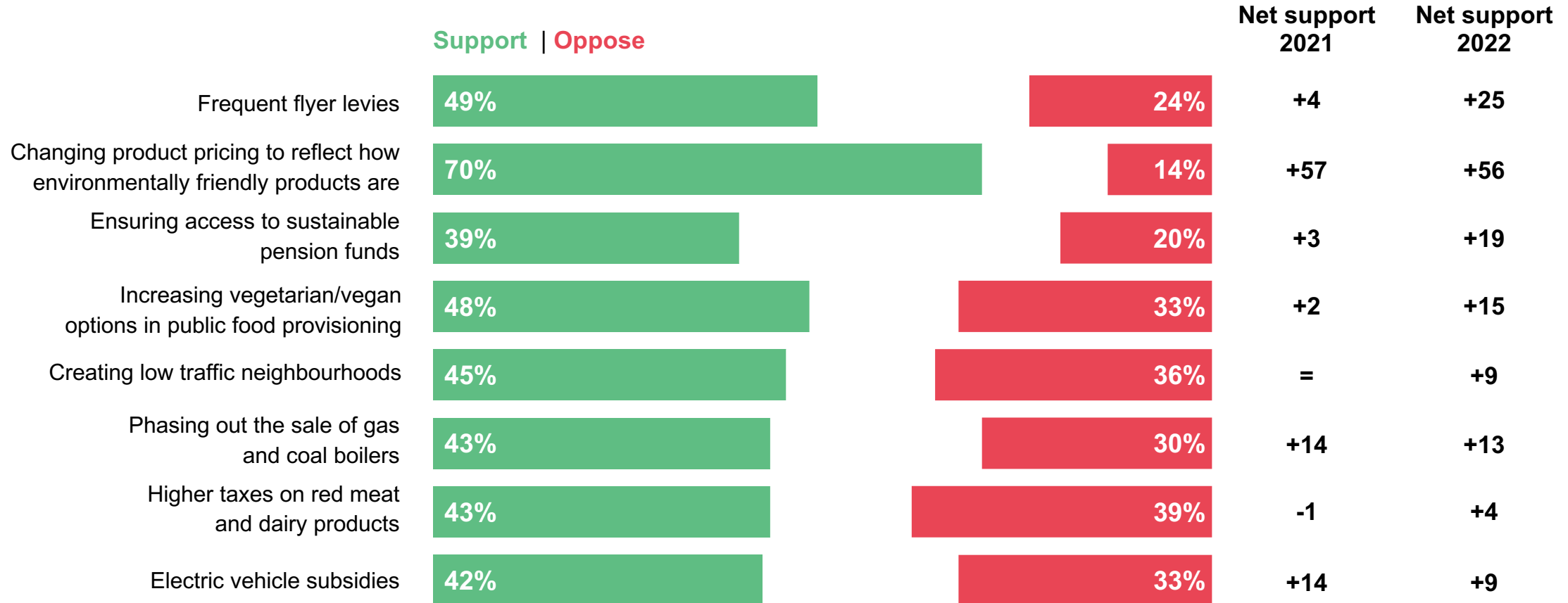


Base: 16,160 UK adults aged 16+ per policy, 27 Oct – 2 Nov 2022.

Q: To what extent do you support or oppose this?

NB: 2021 figures will differ from previous releases as they show support for neutral policy framing, which was shown in the 2022 re-run.

After considering the personal lifestyle impact, the UK public would still support net zero policies on balance

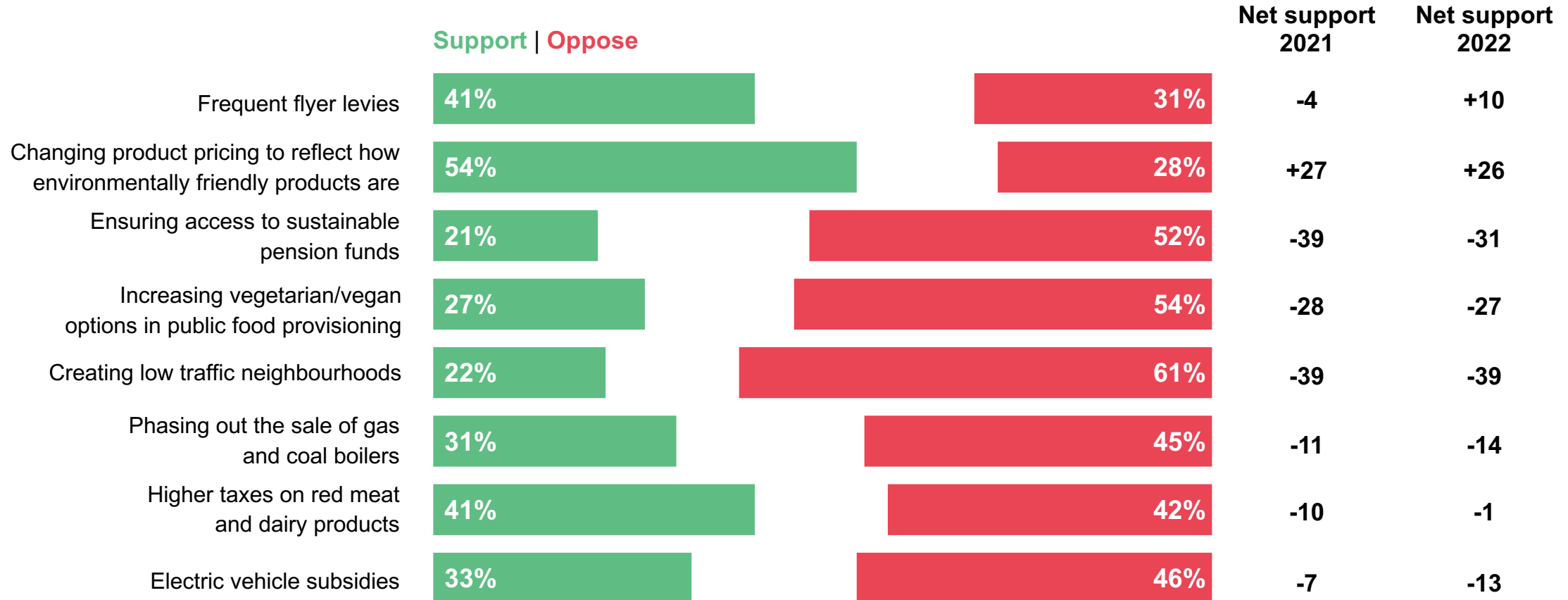


Base: 2022 - 16,160 UK adults aged 16+ per policy, 27 Oct – 2 Nov 2022.

Q: If this policy meant that you personally ... to what extent do you support or oppose it?

NB: 2021 figures will differ from previous releases as they show support for neutral policy framing, which was shown in the 2022 re-run. Net support is the overall level of support for the policy accounting for those who oppose it i.e. the difference between support and oppose.

After considering the personal financial impact, only frequent flyer levies and changing product pricing still enjoy overall support



Base: 2022 - 16,160 UK adults aged 16+ per policy, 27 Oct – 2 Nov 2022.

Q: If this policy meant that you personally ... to what extent do you support or oppose it?

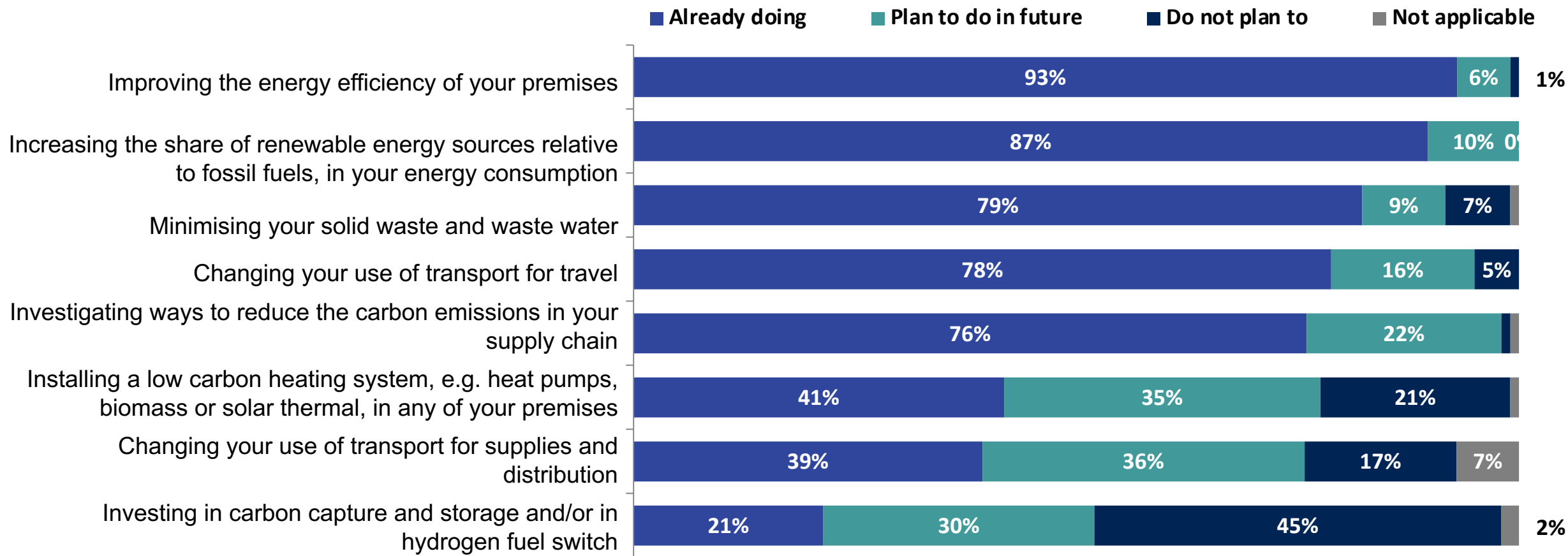
NB: 2021 figures will differ from previous releases as they show support for neutral policy framing, which was shown in the 2022 re-run.

03

Industrial transition towards Net Zero

Nearly all Captains are already improving the energy efficiency of their premises, increasing their share of renewable energy sources

Some businesses are making changes to help reduce or respond to environmental impacts. Is this something you have already done, plan to do in future, or do not plan to? (%)

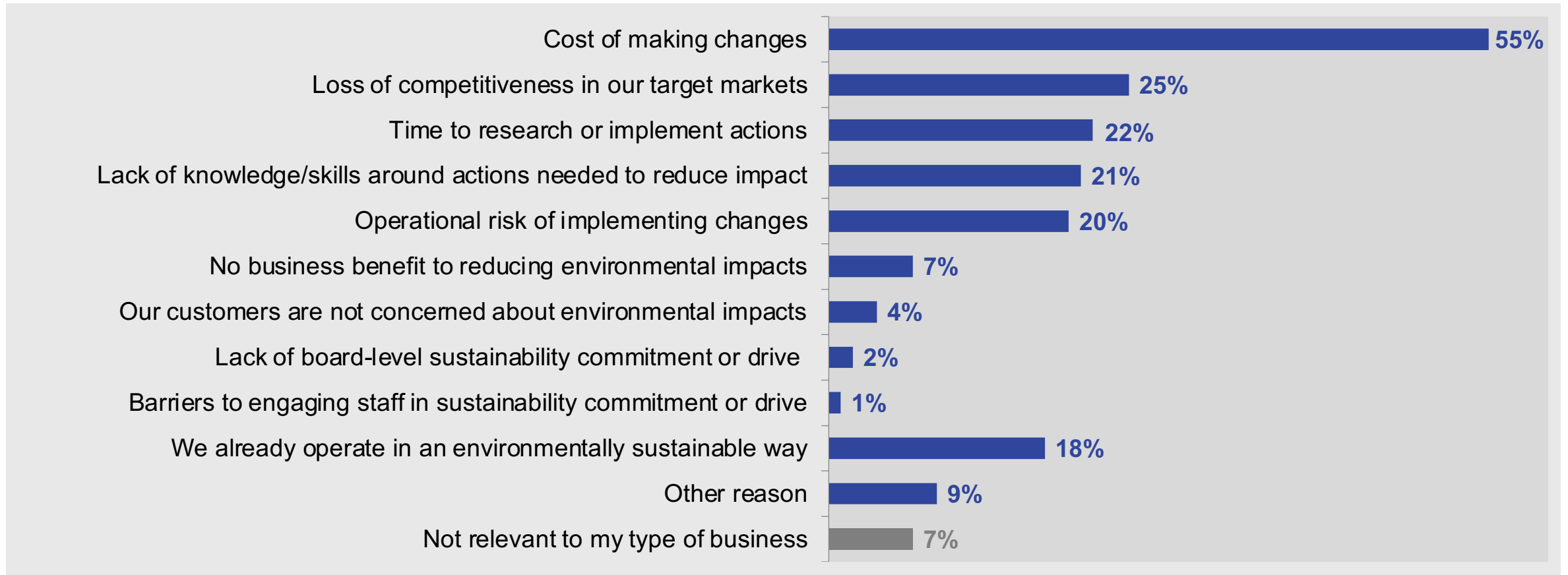


Base: British Captains of Industry (107); Interviewed May – August 2021



Cost is the biggest barrier preventing Captains from taking actions to reduce environmental impact

Which, if any, of these might prevent your business from taking actions to reduce its environmental impact? (%)



Base: British Captains of Industry (107); Interviewed May – August 2021

04

Implications for policymakers and industry

Implications for industry & policymakers

To support the transition to Net Zero, there is a need to raise awareness of the societal transformations needed to reach Net Zero, their benefits and the costs of inaction.



Public support for net zero policies is fragile and influenced by perceptions of personal impact.

Net Zero policies and actions **need to be affordable and fair to everyone** and **consider the views of those affected**.



Understanding the public's valid concerns about net zero policies and their implications is essential. Personal costs are important – and so are co-benefits.

Policy-makers should **minimise the cost** of such policy measures (**but be honest about them**) and **communicate the benefits** more strongly.



The more policy and brand decision-makers can engage people with the issue, the more likely they are to be supportive of Net Zero policies and to see these as fair. Communication on diet should be prioritised, and all messaging should be tailored to different groups.

Consider fairness factors in **design and communication** of Net Zero policies.



Consider who the influencers are.

Our Net Zero Living research indicated that **engaging women** (who are more active) on these policy measures **could help influence others** around them to shift.

THANK YOU.

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