

Landscape analysis

SSE

November 2023

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Methodology and summary of findings

Methodology: polling

J.L. Partners polled a UK nationally representative audience of 6,016 respondents

- Fieldwork dates of 23rd August- 4th September 2023
- Sample of 6,016
- Quotas were added to ensure representative data:
 - On gender, age, region, 2019 vote, socio-economic group and ethnicity
- The sample was weighted back to its own representative population using ONS data:
 - Using gender, age, region, 2019 vote, socio-economic group and ethnicity
- Sample collected using online panel
- 15-minute duration
- Margin of error: 1.26%

Key audiences:

- Rarely have concerns over bills
- Always/ frequently have concerns over bills

- Energy security audience
- Energy price audience

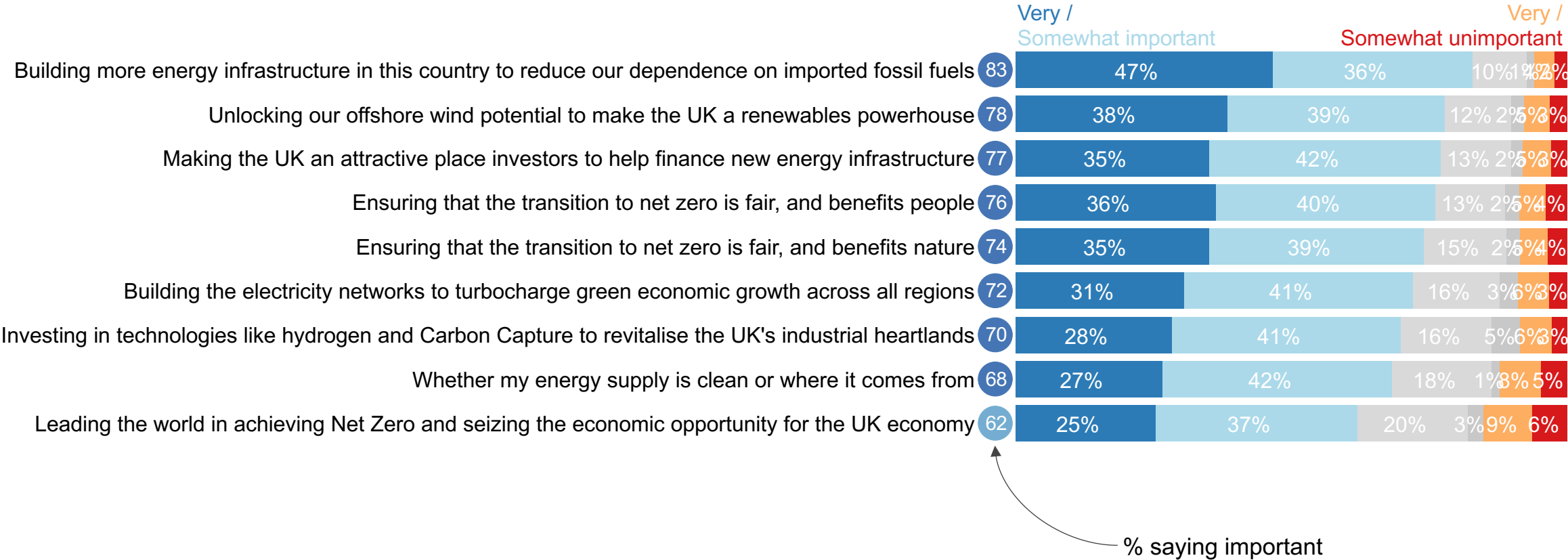
- Soft Conservative – Conservative voters who say they may change their vote
- Soft Labour – Labour voters who say they may change their vote
- Waverers – 2019 Conservatives who are as yet undecided about next time

Objective analysis



Almost half saying building more energy infrastructure is very important to the future of Britain

How important or unimportant do you feel each of the following objectives are to the future of Britain?



Both soft Conservative and Labour voters see all the objectives as important, this includes leading the world in net zero and investing in renewable energy

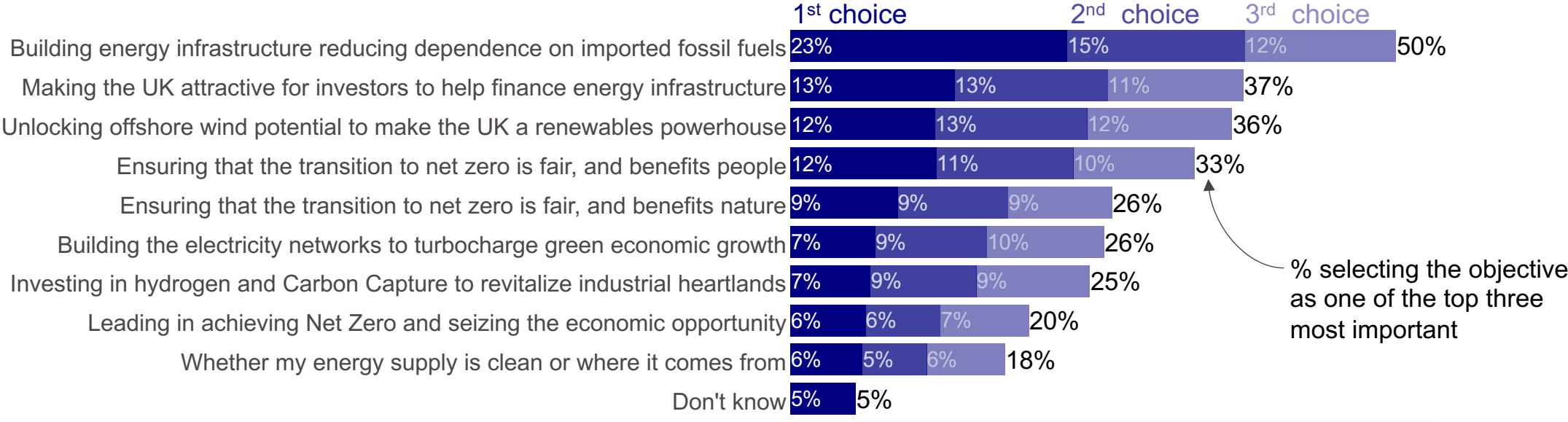
How important or unimportant do you feel each of the following objectives are to the future of Britain?

	All	No/rarely have concerns over bills	Always/ frequently have concerns over bills	Energy security very important	Lower energy prices very important	Soft Con	Soft Lab	Waverer
Building more energy infrastructure in this country to reduce our dependence on imported fossil fuels	+77	+78	+73	+89	+88	+74	+70	+81
Making the UK an attractive place for investors to help finance new energy infrastructure	+69	+72	+64	+82	+80	+71	+62	+73
Unlocking our offshore wind potential to make the UK a renewables powerhouse	+70	+73	+63	+86	+83	+65	+69	+66
Ensuring that the transition to net zero is fair, and benefits people	+67	+69	+62	+84	+82	+61	+59	+63
Building the electricity networks to turbocharge green economic growth across all regions	+63	+65	+61	+85	+82	+64	+64	+54
Ensuring that the transition to net zero is fair, and benefits nature	+65	+67	+61	+84	+81	+58	+62	+61
Investing in technologies like hydrogen and Carbon Capture to revitalise the UK's industrial heartlands	+61	+64	+54	+78	+74	+65	+60	+58
Whether my energy supply is clean or where it comes from	+56	+56	+52	+80	+74	+58	+56	+42
Leading the world in achieving Net Zero and seizing the economic opportunity for the UK economy	+47	+48	+43	+77	+69	+53	+54	+18

% saying important minus
% saying unimportant

Achieving energy security by increasing energy infrastructure tops the list of priorities, ensuring net zero has tangible benefits is also valued highly

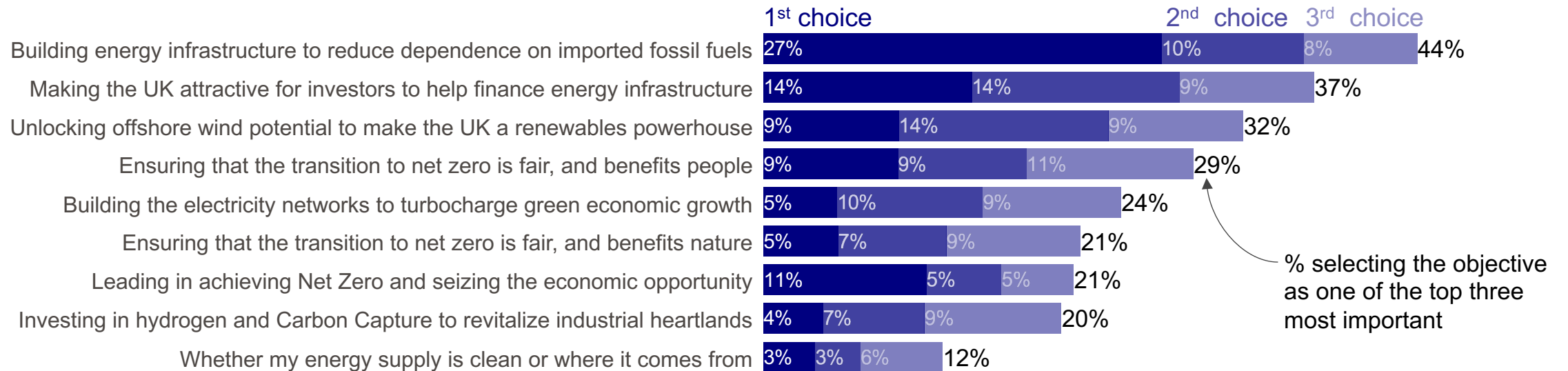
Now, for the same list of objectives, please check which ones you think are the most important. Select up to three in order of importance.



Q8. Now, for the same list of objectives, please check which ones you think are the most important. Select up to three in order of importance.

Building energy infrastructure to reduce dependence on imports is the top ranked objective affecting vote choice

Now, for the same list of objectives, please check which ones will have the most impact on your vote at the next general election. Select up to three in order of importance.

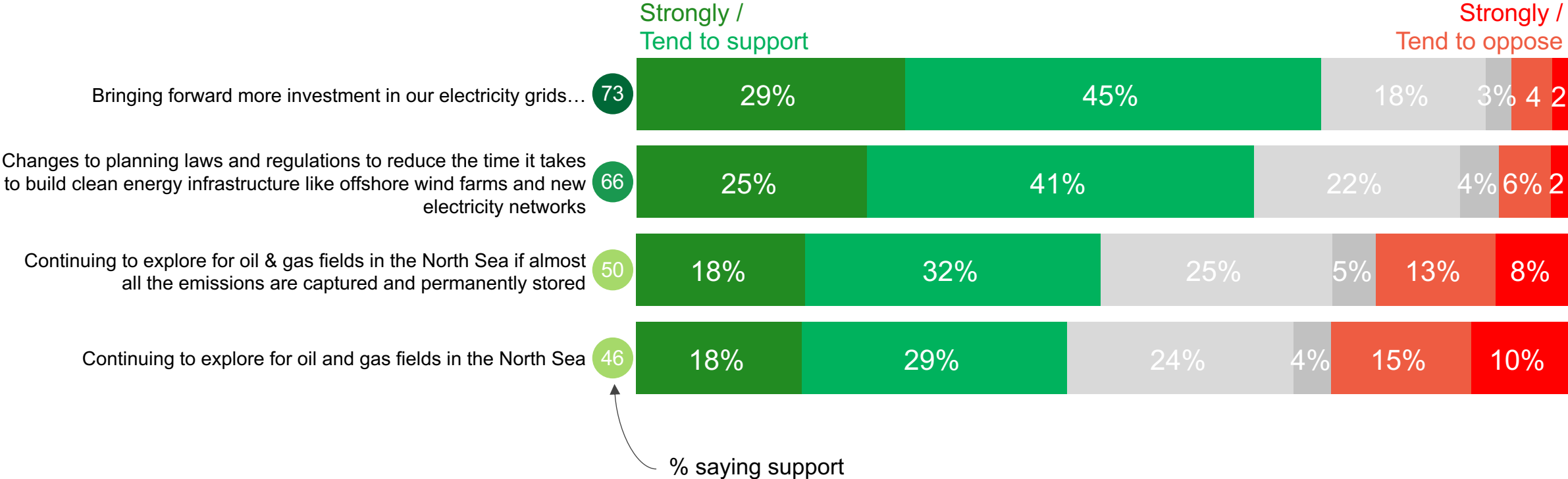


Policy Support



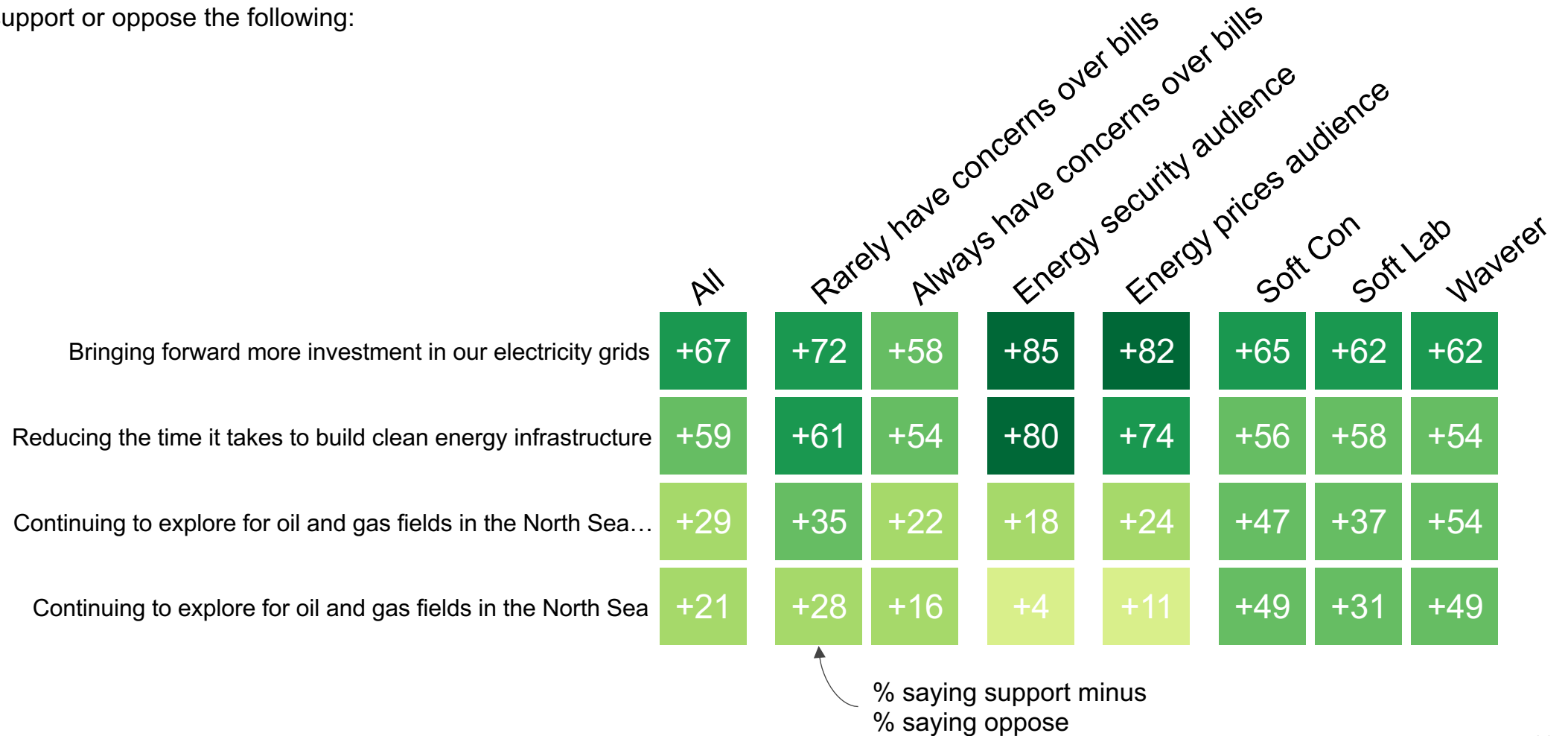
3 in 4 support increasing investment in electricity grids, while around half support continued exploration for oil gas fields

Do you support or oppose the following:



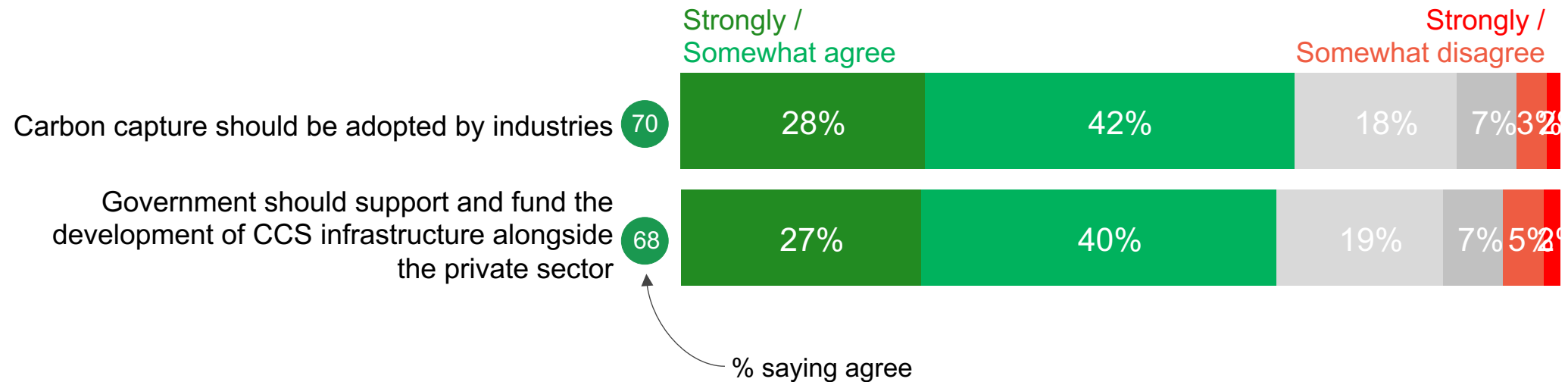
Soft Conservatives and Waverers have high levels of net support for continued exploration, those same groups also back reducing the time taken to build clean energy infrastructure

Do you support or oppose the following:



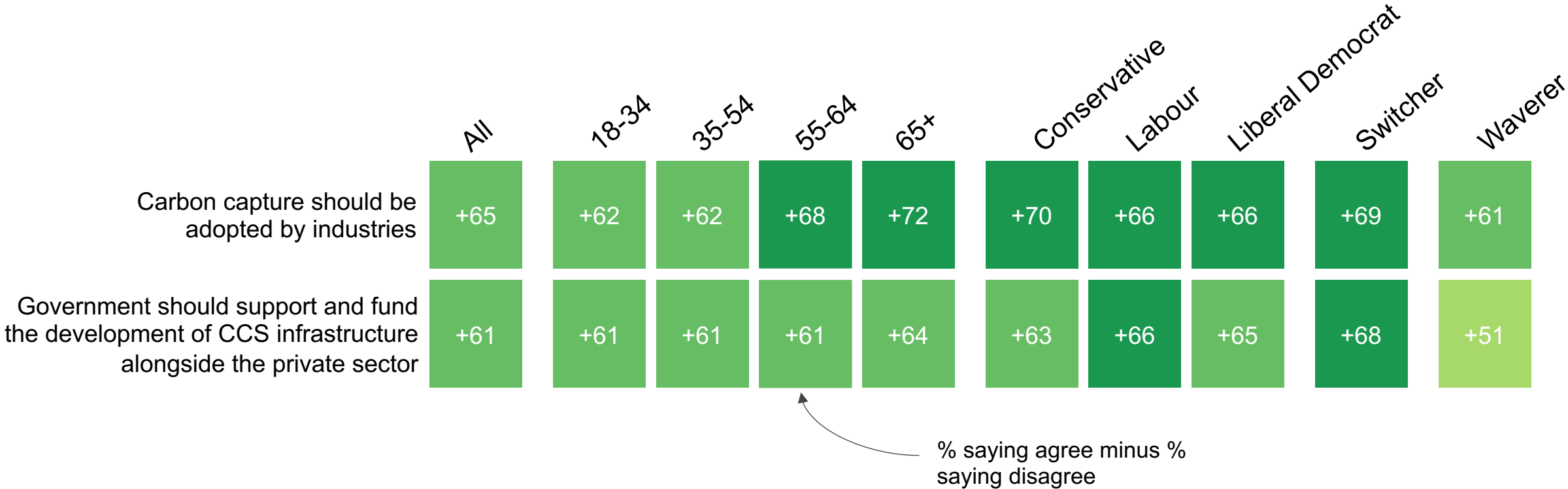
Single digit percent of people disagree with carbon capture adoption and investment

Do you agree or disagree with each of the following statements?



Carbon capture adoption and investment is popular amongst all age groups and parties

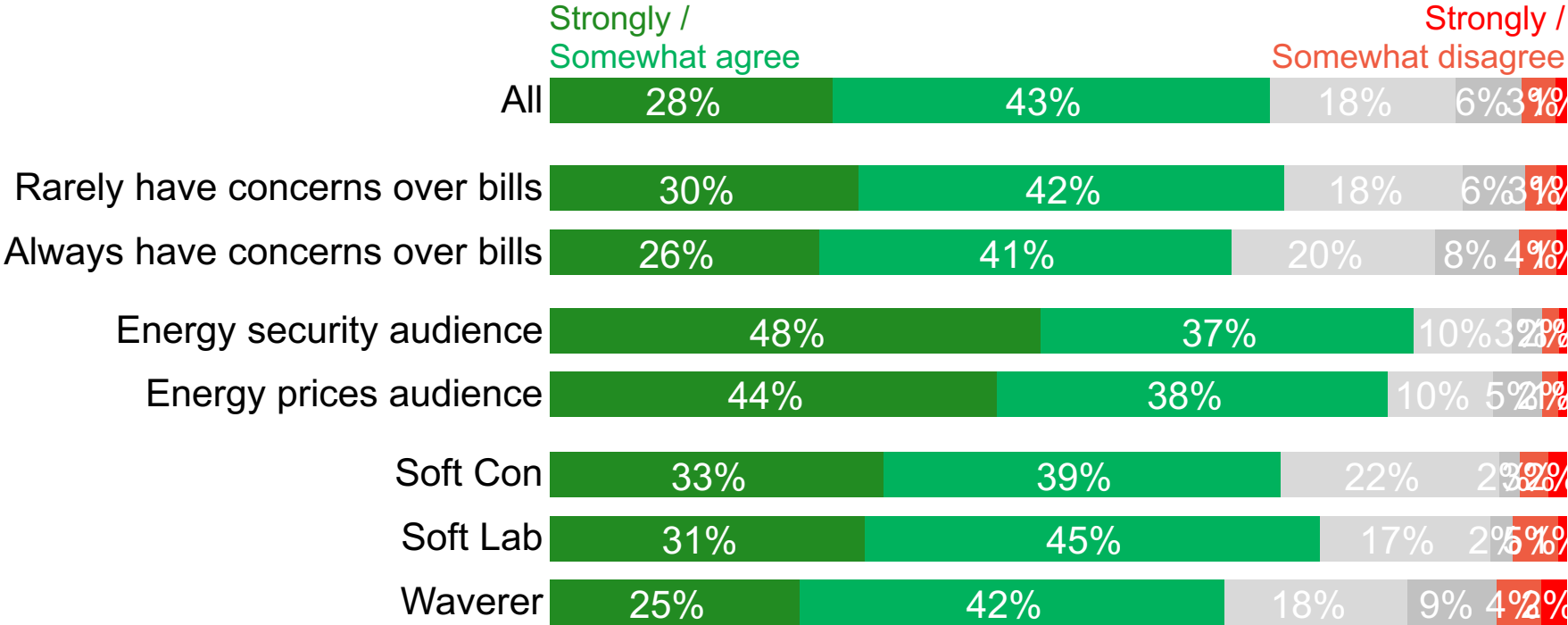
Do you agree or disagree with each of the following statements?



Q11. Carbon capture and storage (CCS) is a process through which carbon-emitting industries can capture the carbon they produce and permanently safely store it so it does not go into the atmosphere. Do you agree or disagree with each of the following statements?

7 in 10 agree that hydrogen can play a significant role, with half of those particularly invested in energy security strongly agreeing

As a low carbon alternative to natural gas, hydrogen can play a significant role in decarbonising heavy industry, power generation and transport.



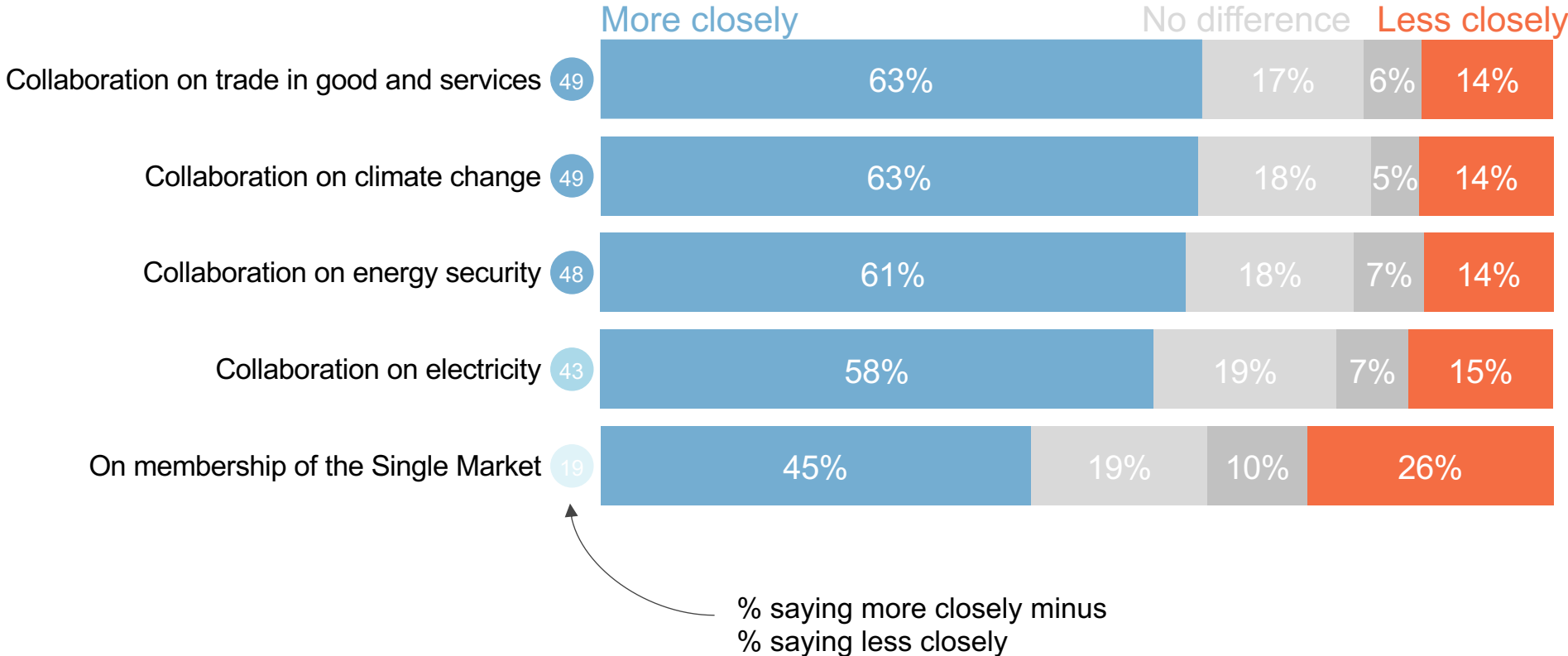
Q12. As a low carbon alternative to natural gas, hydrogen can play a significant role in decarbonising heavy industry, power generation and transport. Do you agree or disagree with the following statement?



Europe

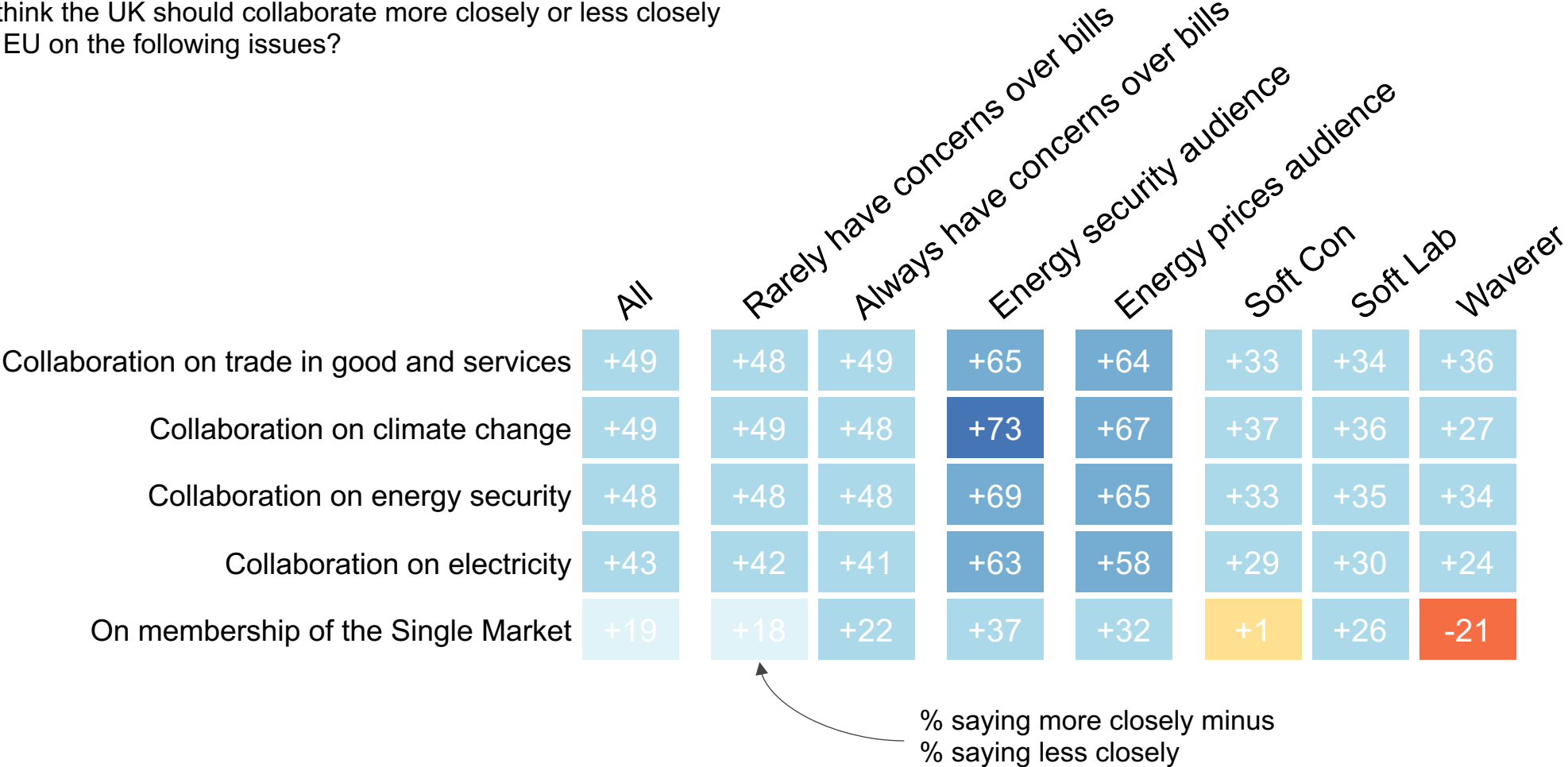
There is support for closer cooperation with the EU on a variety of energy related measures

Do you think the UK should collaborate more closely or less closely with the EU on the following issues?



Those who are invested in energy security are willing to cooperate with the EU to achieve that aim

Do you think the UK should collaborate more closely or less closely with the EU on the following issues?



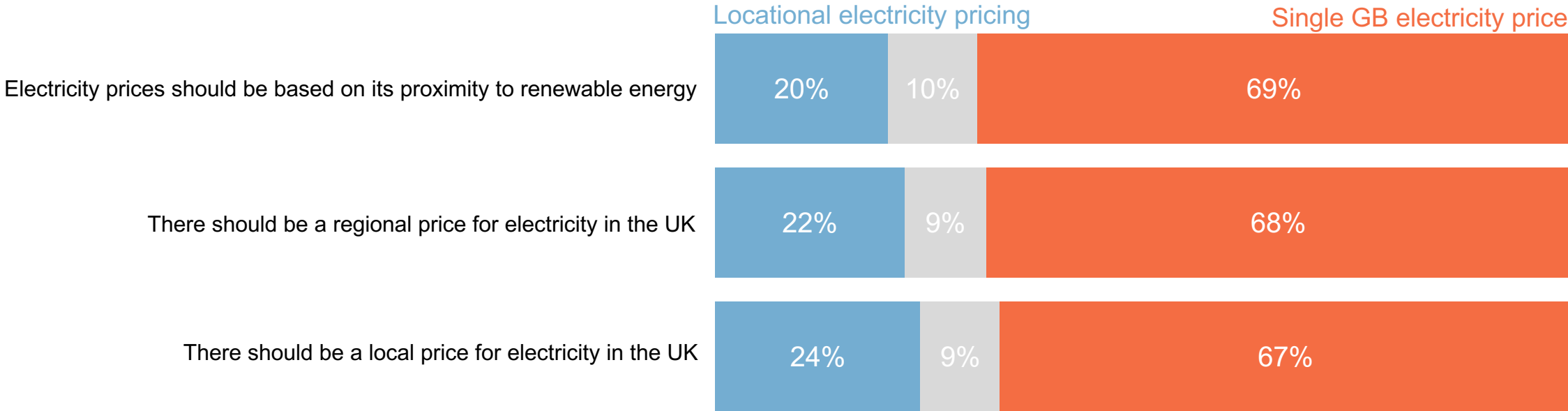


Market design



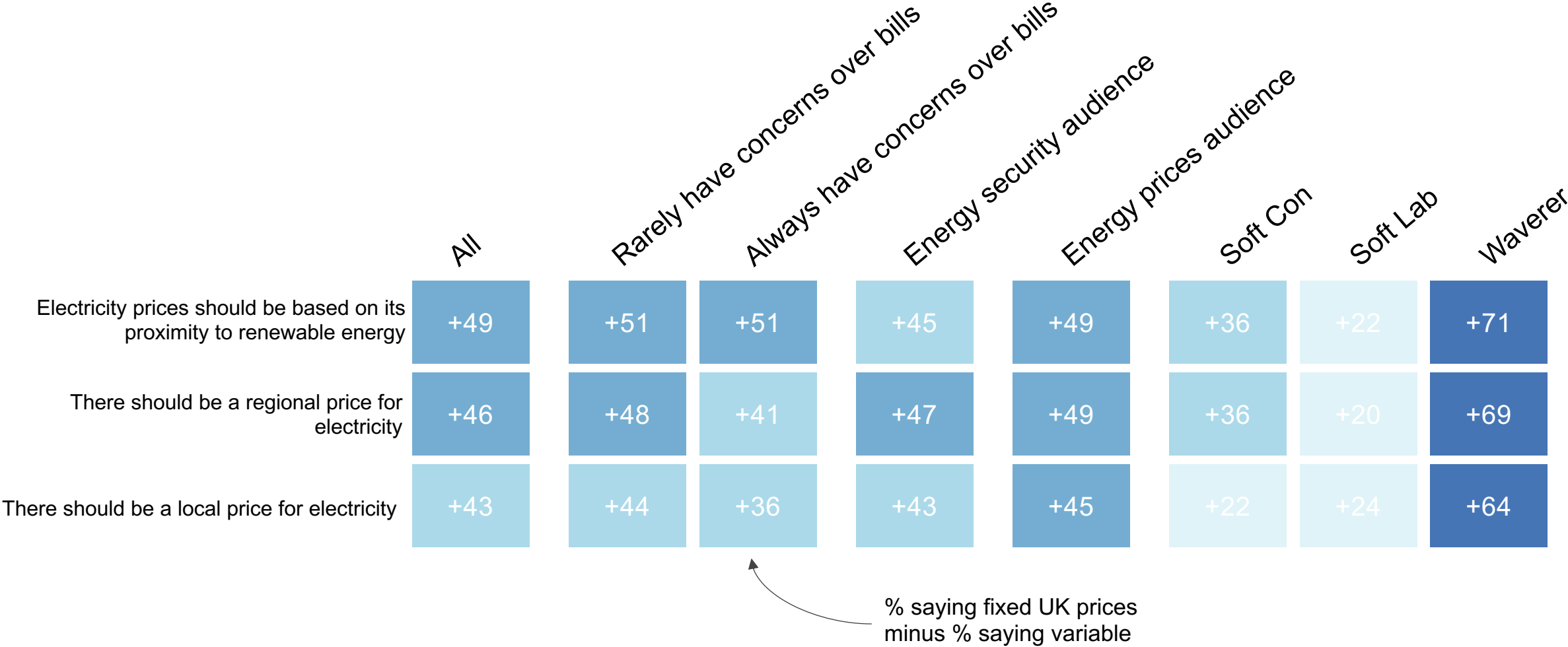
Two-thirds of people support a single electricity price across Great Britain

The Government is currently considering reforms to the electricity market that would move away from a single electricity price across Great Britain towards local or regional electricity pricing which would vary on its proximity to renewable energy. Which of the following pairs of statements comes closest to your view?



Q14. The Government is currently considering reforms to the electricity market that would move away from a single electricity price across Great Britain towards local or regional electricity pricing which would vary on its proximity to renewable energy. Which of the following pairs of statements comes closest to your view?

Waverers are strongest group in opposing postcode pricing for electricity



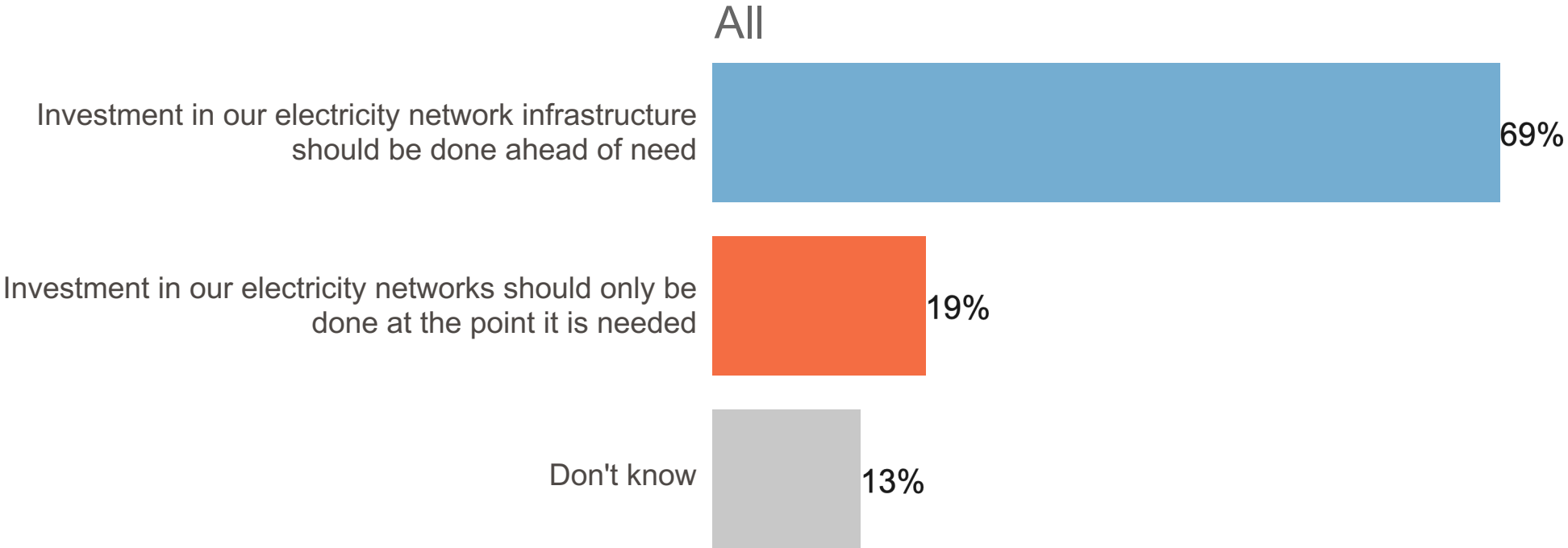
Q14. The Government is currently considering reforms to the electricity market that would move away from a single electricity price across Great Britain towards local or regional electricity pricing which would vary on its proximity to renewable energy. Which of the following pairs of statements comes closest to your view?

Both Red and Blue Walls most opposed to postcode pricing with no regions being near net opposition



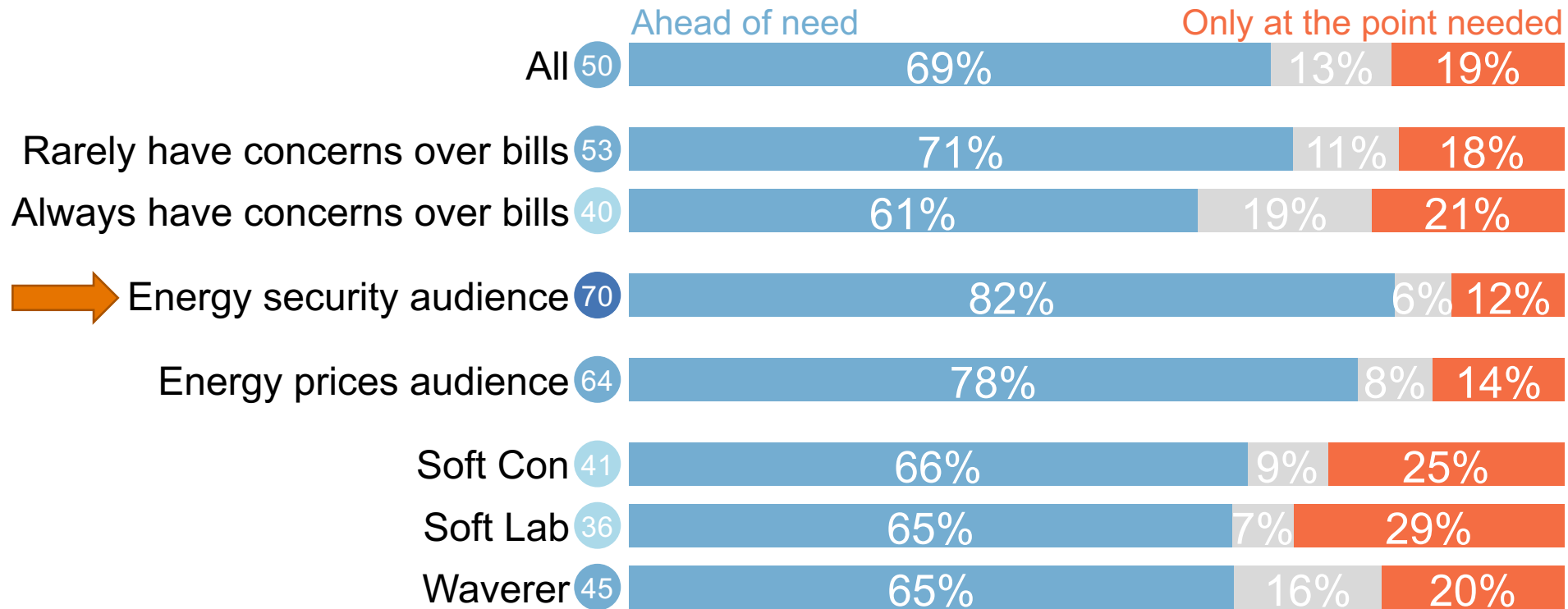
More than two thirds say grid investment should be done ahead of need

There are two approaches that are on the table for investment in electricity infrastructure in the UK.
Please pick which one you would rather have:



8 in 10 of those who prioritise energy security say investment should be done ahead of need

There are two approaches that are on the table for investment in electricity infrastructure in the UK. Please pick which one you would rather have:

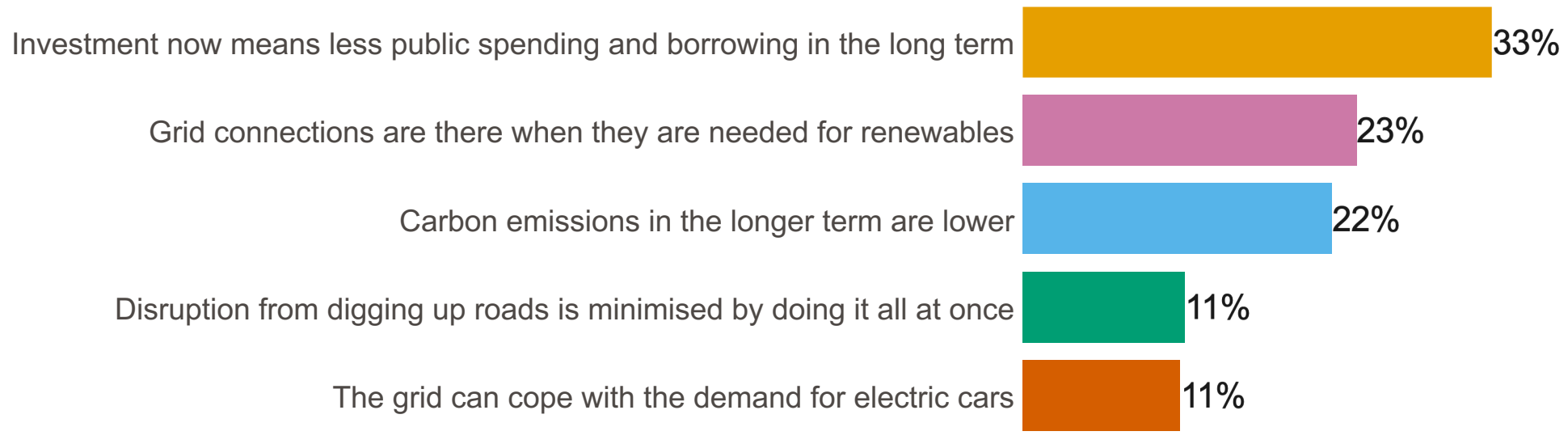


% saying ahead of need minus % saying only at point needed



Savings in the long term are the most persuasive reason for bringing forward spending in low carbon infrastructure

The following are all reasons that people have suggested for bringing forward spending on the UK electricity grid. Please select the reason that you find to be most persuasive:



Waverers are most persuaded by the aim of reducing spending in the long term

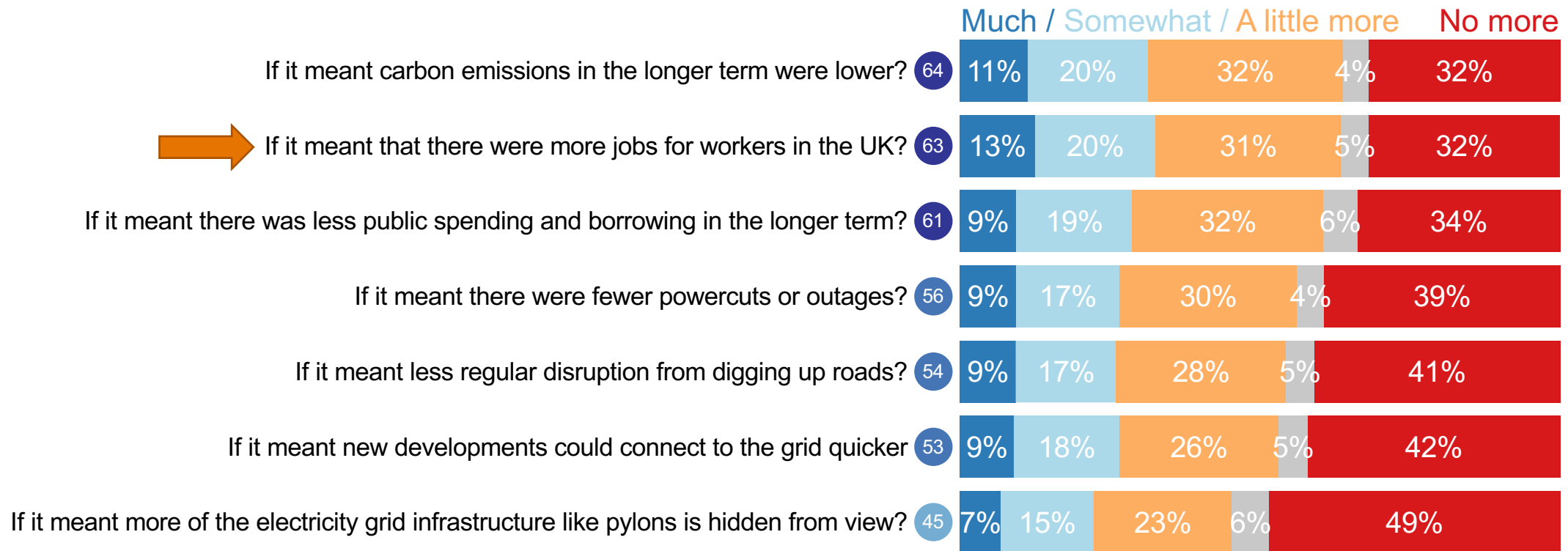
Please select the reason that you find to be most persuasive:

	All	Rarely have concerns over bills	Always have concerns over bills	Energy security audience	Energy prices audience	Soft Con	Soft Lab	Waverer
So that investment now means less public spending and borrowing in the long term	+33	+32	+33	+26	+31	+33	+25	+37
So that grid connections are there when they are needed for renewables	+23	+24	+21	+25	+25	+19	+22	+24
So that carbon emissions in the longer term are lower	+22	+21	+21	+29	+26	+18	+23	+13
So that disruption from digging up roads is minimised by doing it all at once	+11	+11	+13	+8	+8	+14	+14	+14
So that the grid can cope with the demand for electric cars	+11	+12	+12	+11	+10	+17	+16	+12



Support for paying up to 'a little more' to achieve benefits we tested

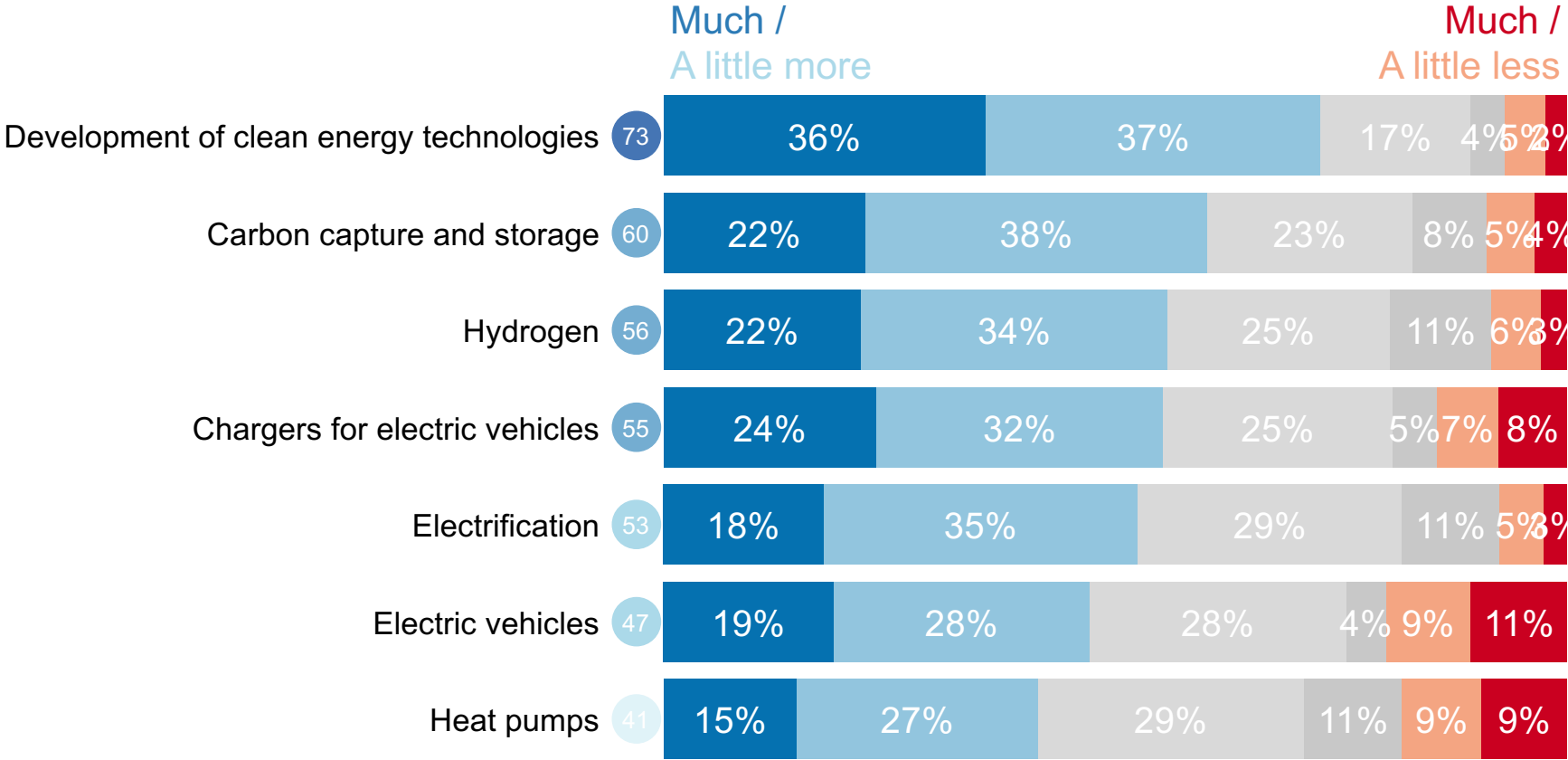
How much more would you be willing to pay for your electricity under the following circumstances:



% saying they would spend at least a little more

3 in 4 say they want to see more government investment in the development of clean energy

Do you want to see more or less government investment in the following things?

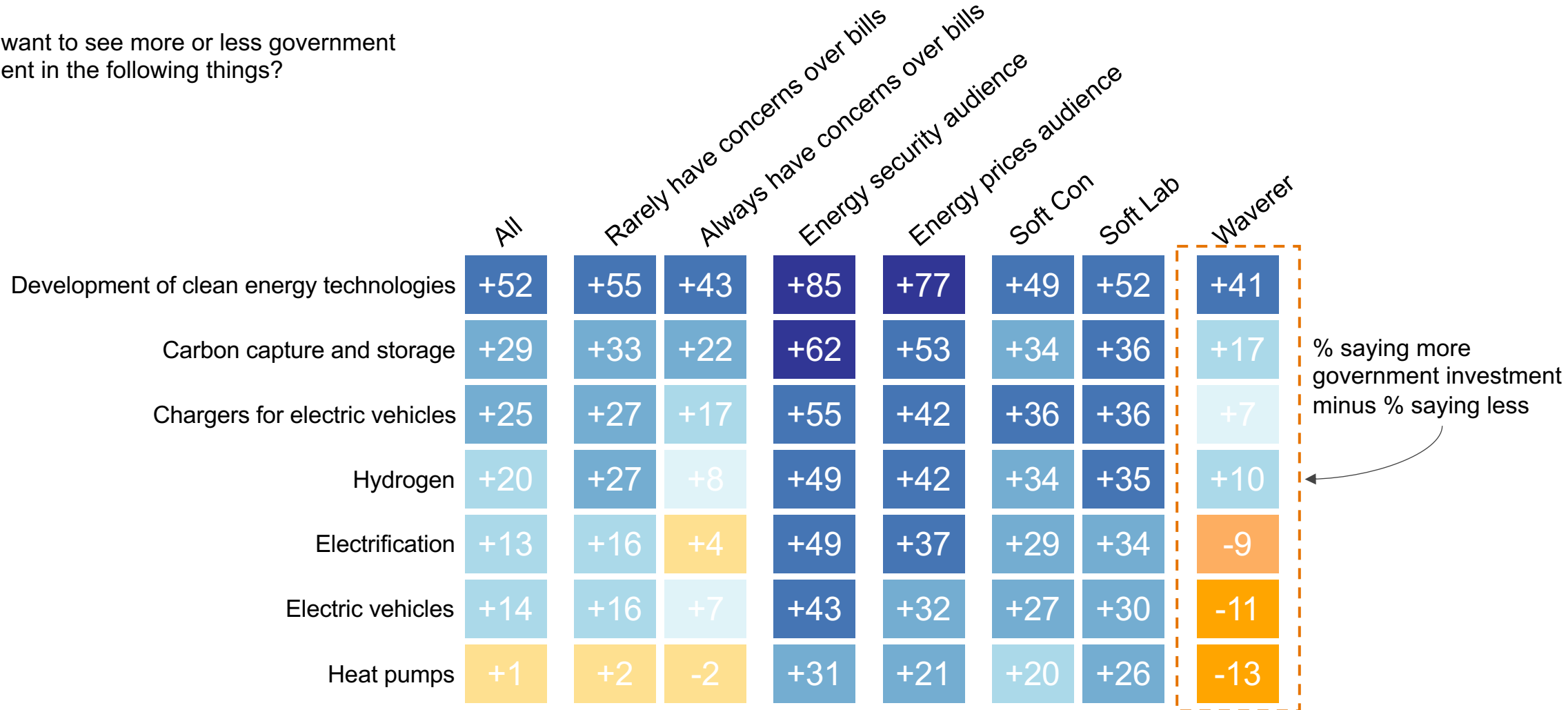


% saying more government investment

Q18. Do you want to see more or less government investment in the following things?

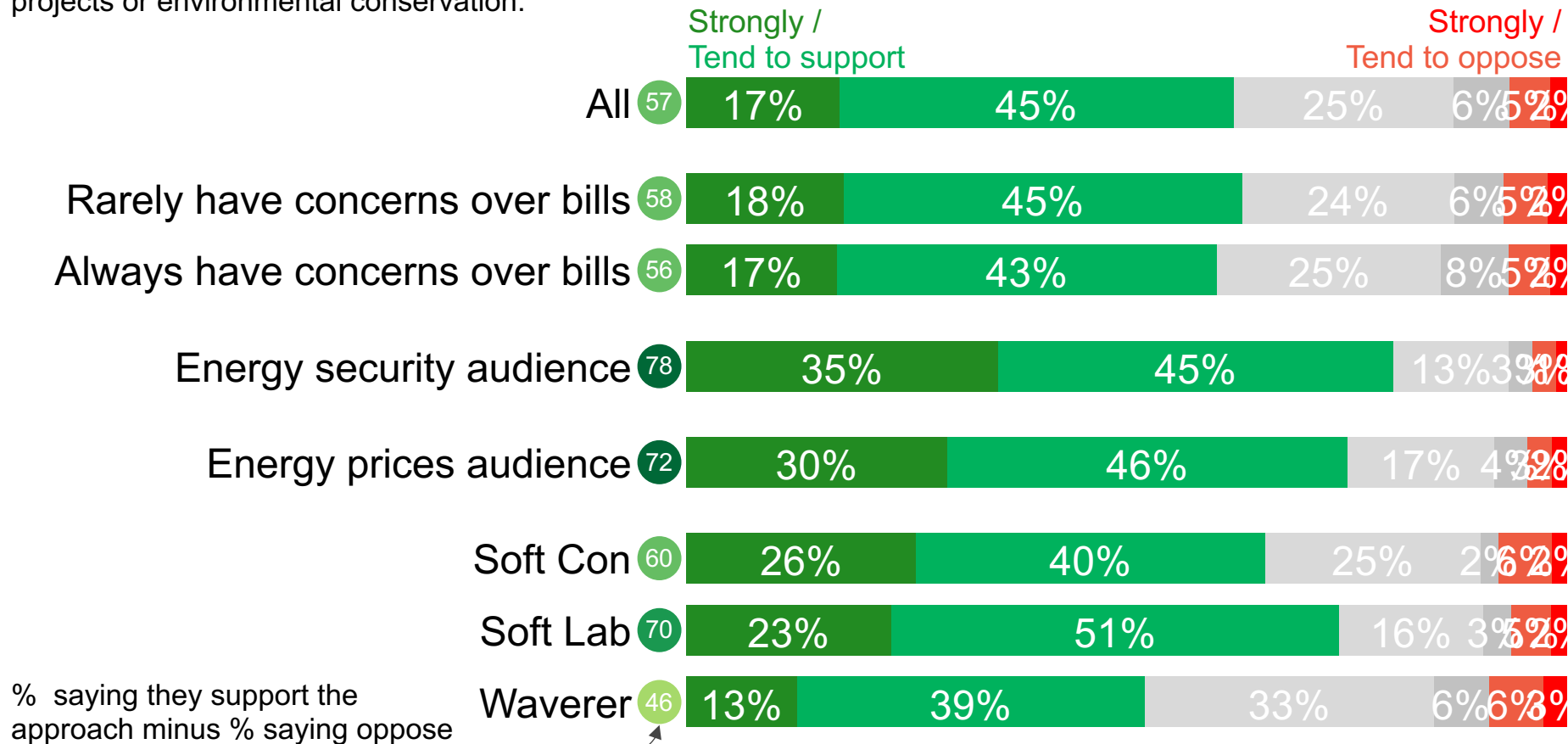
Waverers are the group most hesitant of government investment however still want to see more spending on clean energy and carbon capture storage

Do you want to see more or less government investment in the following things?



Most people support increased funding to benefit the community, percent opposing are in low single digits.

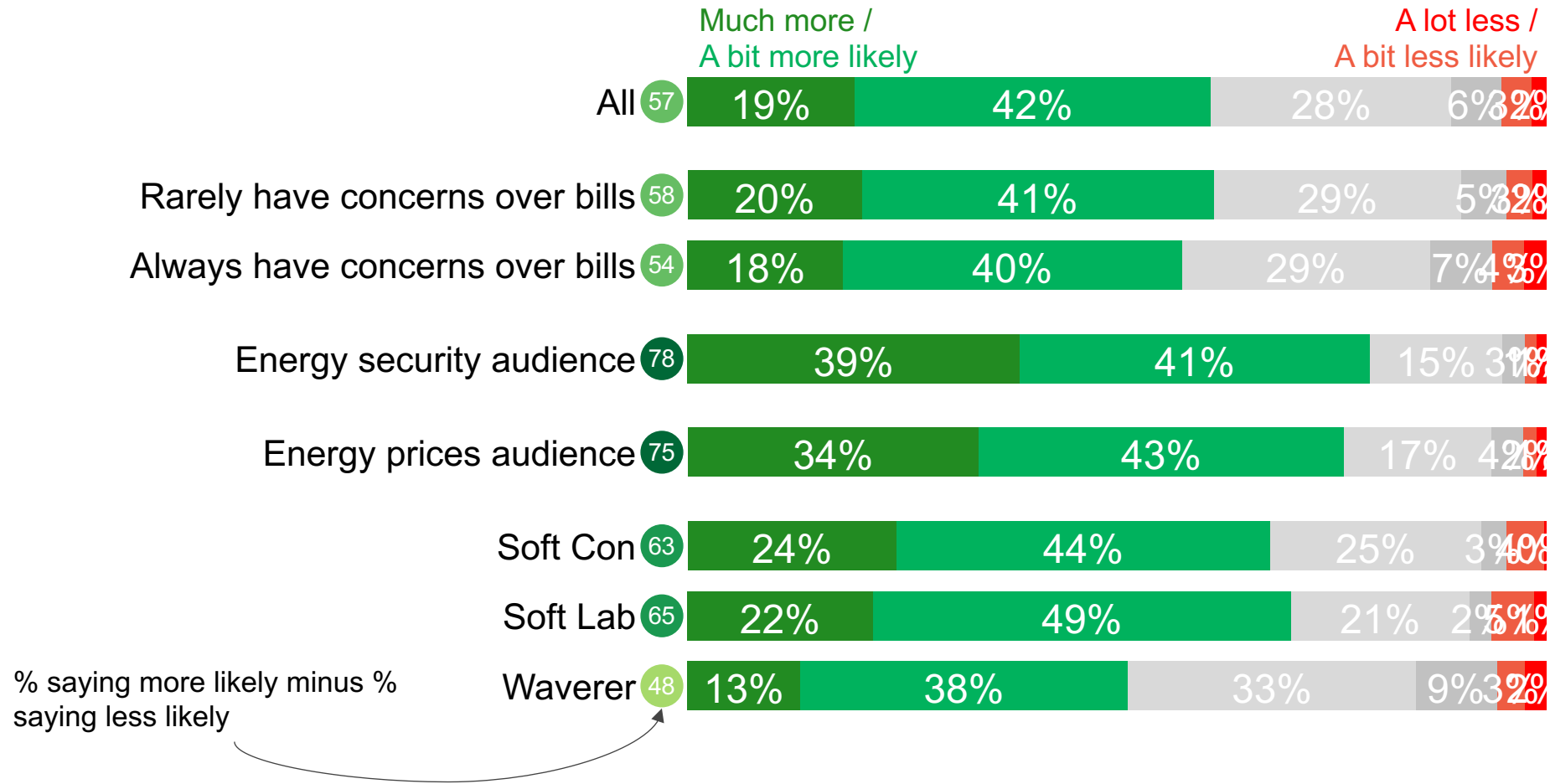
Some have suggested that areas which host new energy infrastructure (e.g. nuclear power stations, wind farms, electricity networks) should receive funding to benefit the community – for example through higher local investment in community facilities, education or job programmes, energy efficiency projects or environmental conservation.



Q19. Some have suggested that areas which host new energy infrastructure (e.g. nuclear power stations, wind farms, electricity networks) should receive funding to benefit the community – for example through higher local investment in community facilities, education or job programmes, energy efficiency projects or environmental conservation. Do you support or oppose such an approach?

1 in 5 say they would be much more likely to support the project if it meant local investment

Imagine you are in an area that is going to have a large low carbon energy infrastructure project built. Would you be more or less likely to support it if your area received higher local investment?

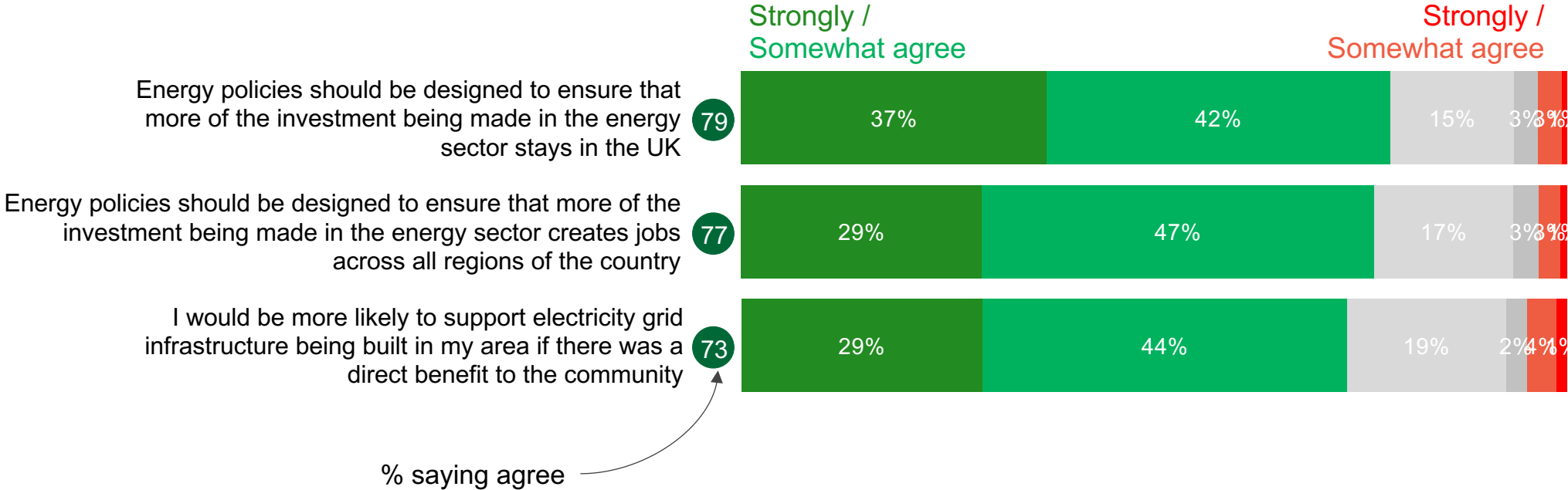


Q20. Imagine you are in an area that is going to have a large low carbon energy infrastructure project built (a new wind farm or electricity line for example). Would you be more or less likely to support it if your area received higher local investment?

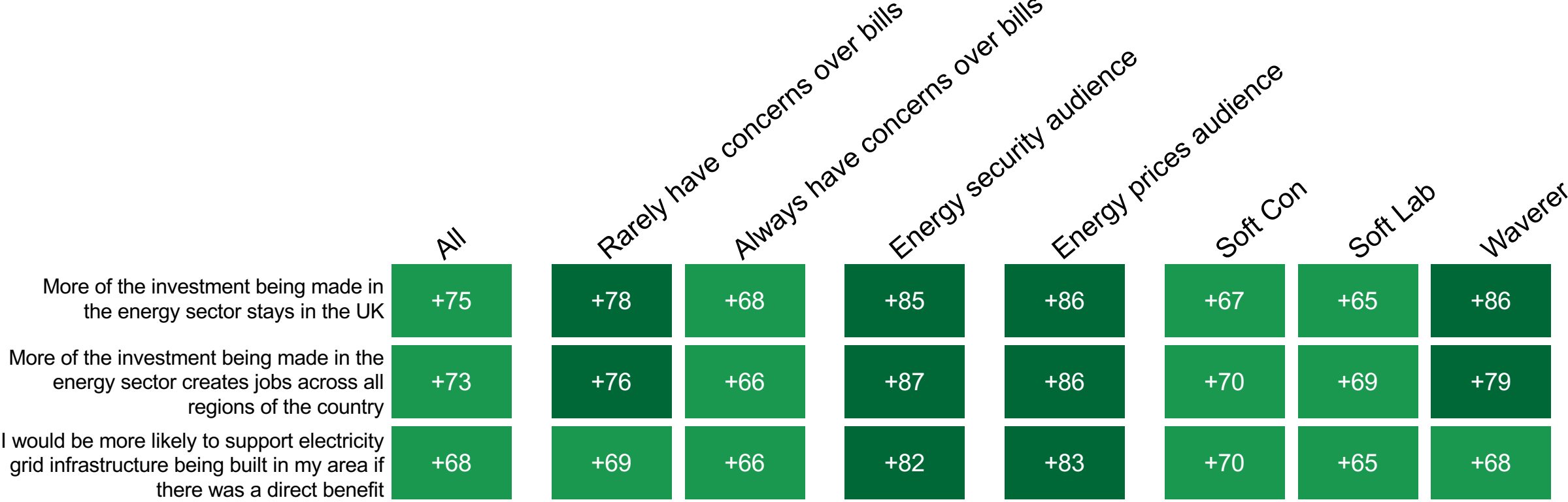
Supply Chain



3 in 4 people agree that policies to ensure investment staying in the UK, creates job and benefits the community



Waverers and those energised by energy security and reducing energy prices overwhelmingly agree

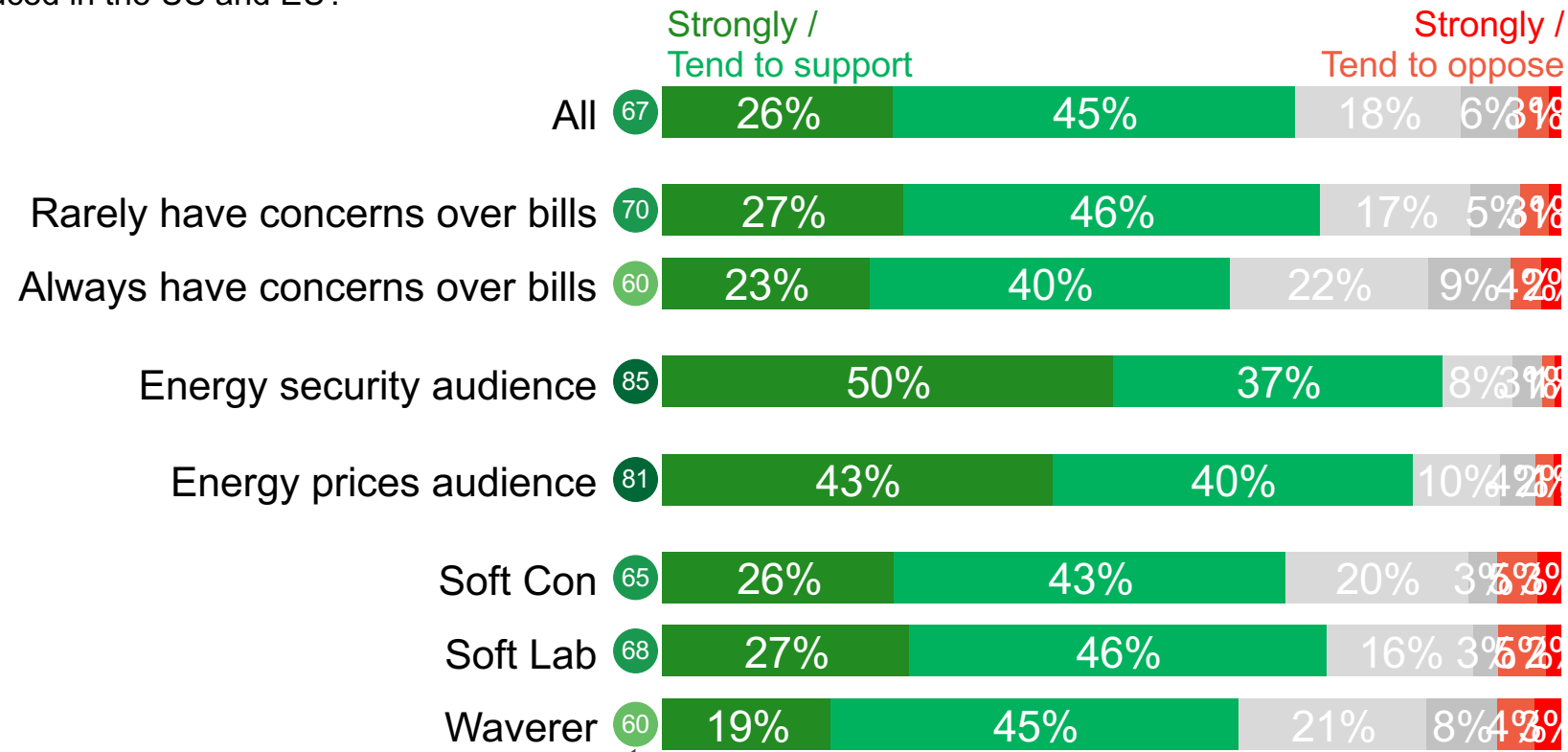


% saying agree minus % saying disagree



Two thirds support large subsidies, including 6 in 10 waverers and soft Conservatives.

In the United States, Joe Biden has announced large subsidies for businesses that open up industrial jobs in the USA, including in clean energy. The EU has also done the same. Do you support or oppose the UK Government doing more to encourage investment here to compete with incentives introduced in the US and EU?



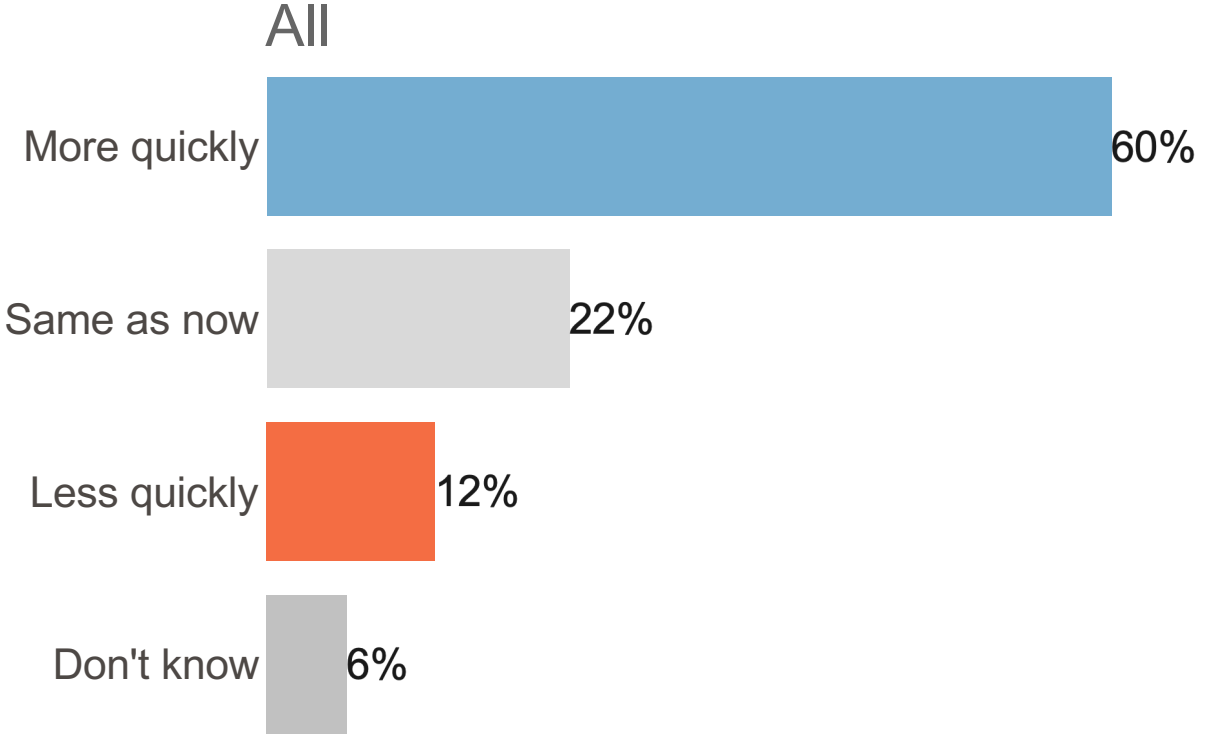
% saying support minus % saying oppose



Transition

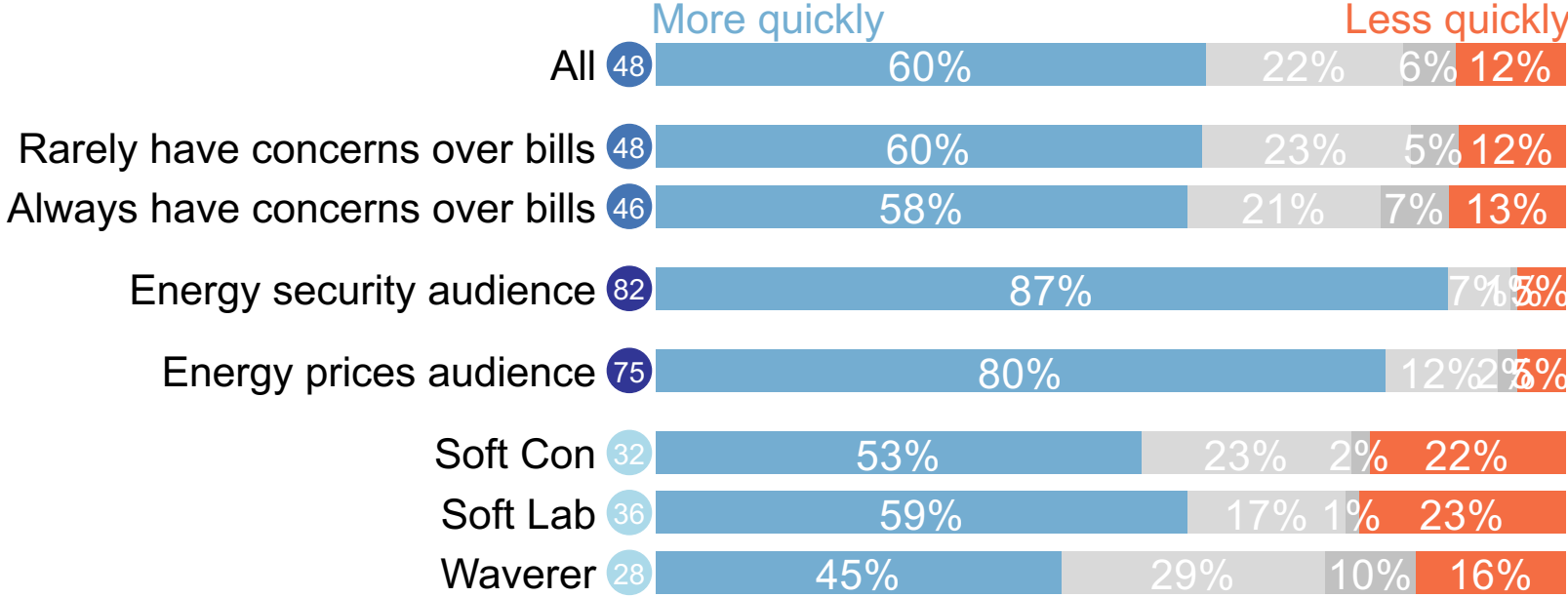
Only 1 in 10 say the UK Government should slow down work to get cleaner energy into the UK

Do you think the UK Government should work to get to cleaner energy in the UK more or less quickly than it is currently doing?



Soft Conservative and Labour voters as well as Waverers are more likely to say the pace should stay as is or slow down

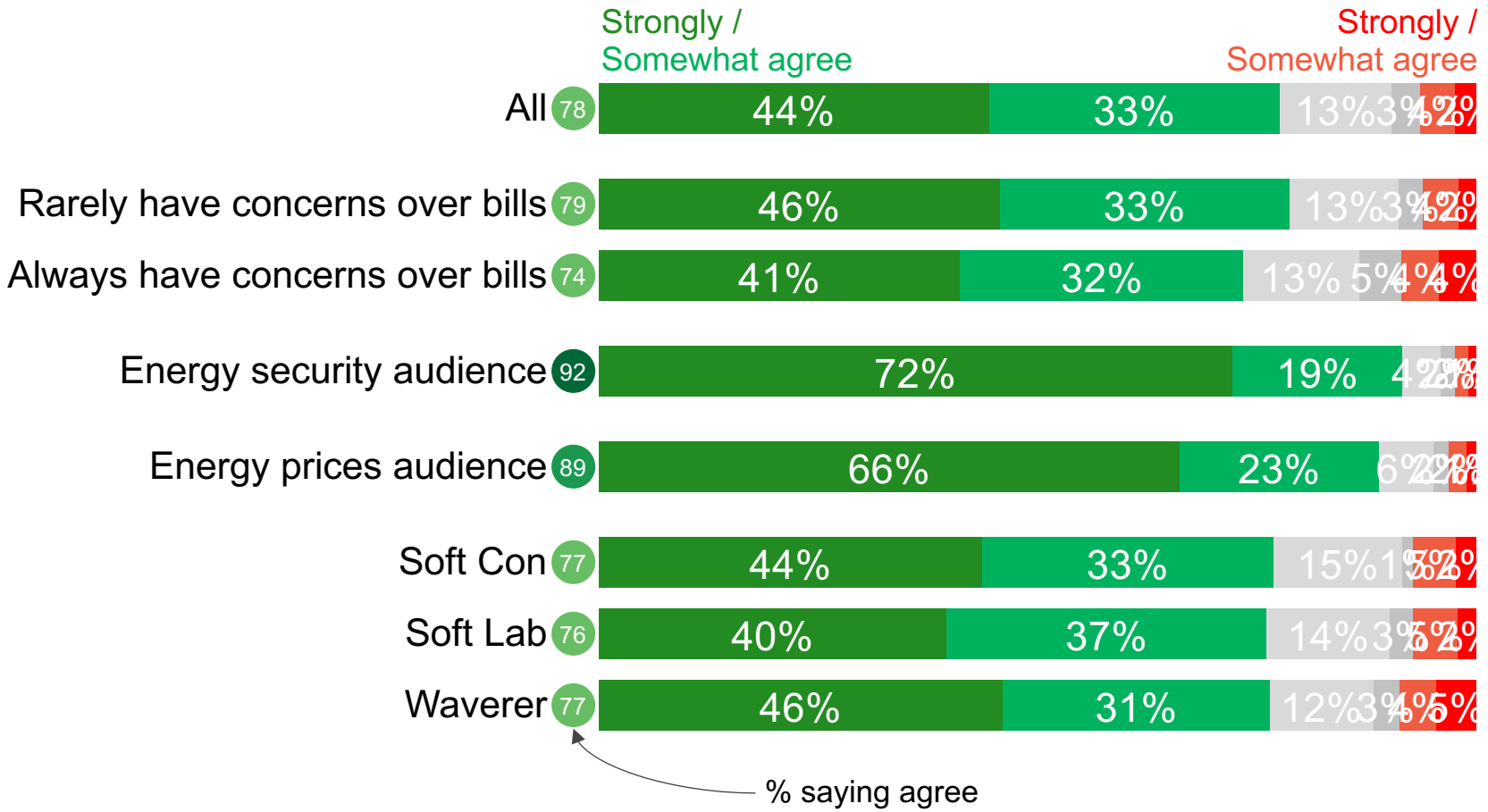
Do you think the UK Government should work to get to cleaner energy in the UK more or less quickly than it is currently doing?



% saying more quickly minus % saying less quickly

Almost half strongly agree that recent events shows the UK need to generate more energy at home

The Russian invasion of Ukraine has shown that we need to speed up the transition to clean energy so we can generate more of our energy at home.

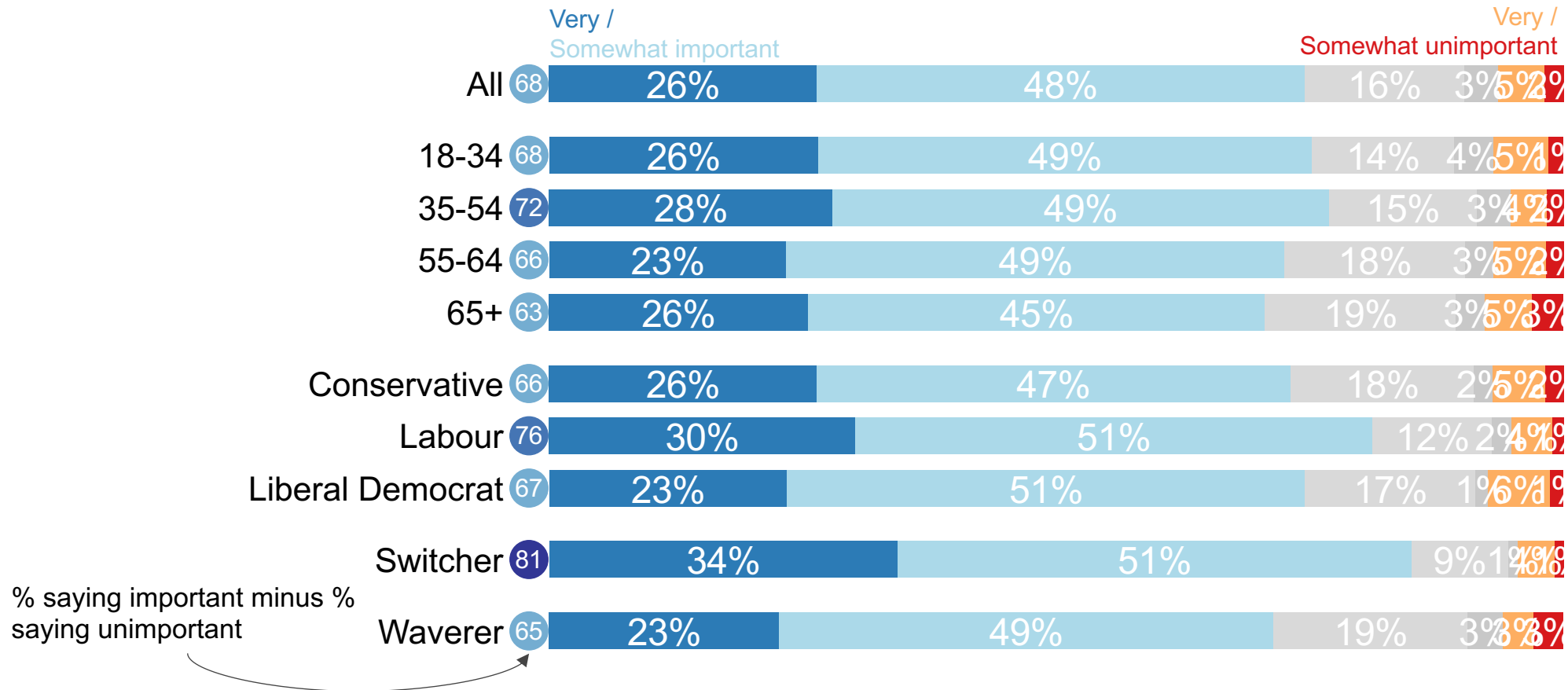




Election

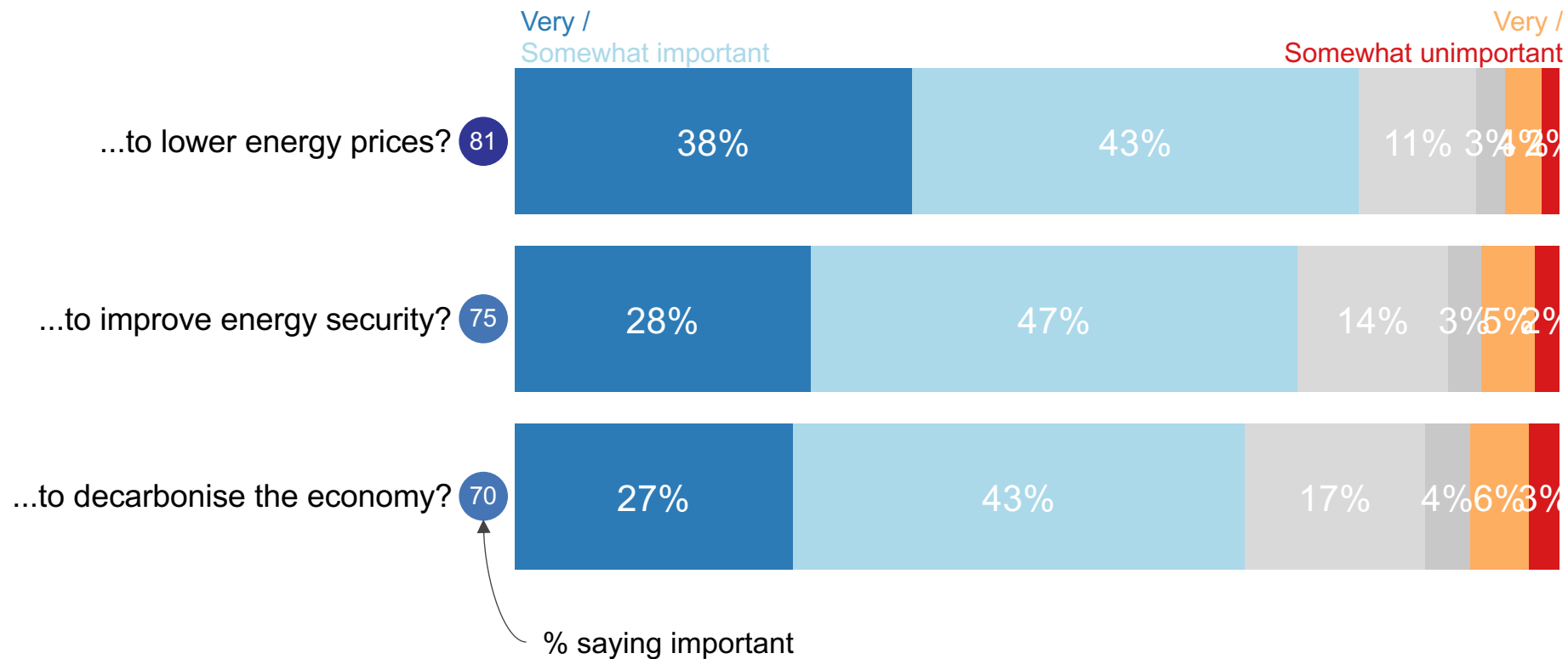
1 in 4 say that an ability to bring improvements and jobs to the local area is very important to future voting behaviour

How important to your vote at the next general election is it that political parties can show that they have or will bring improvements and jobs to your local area?



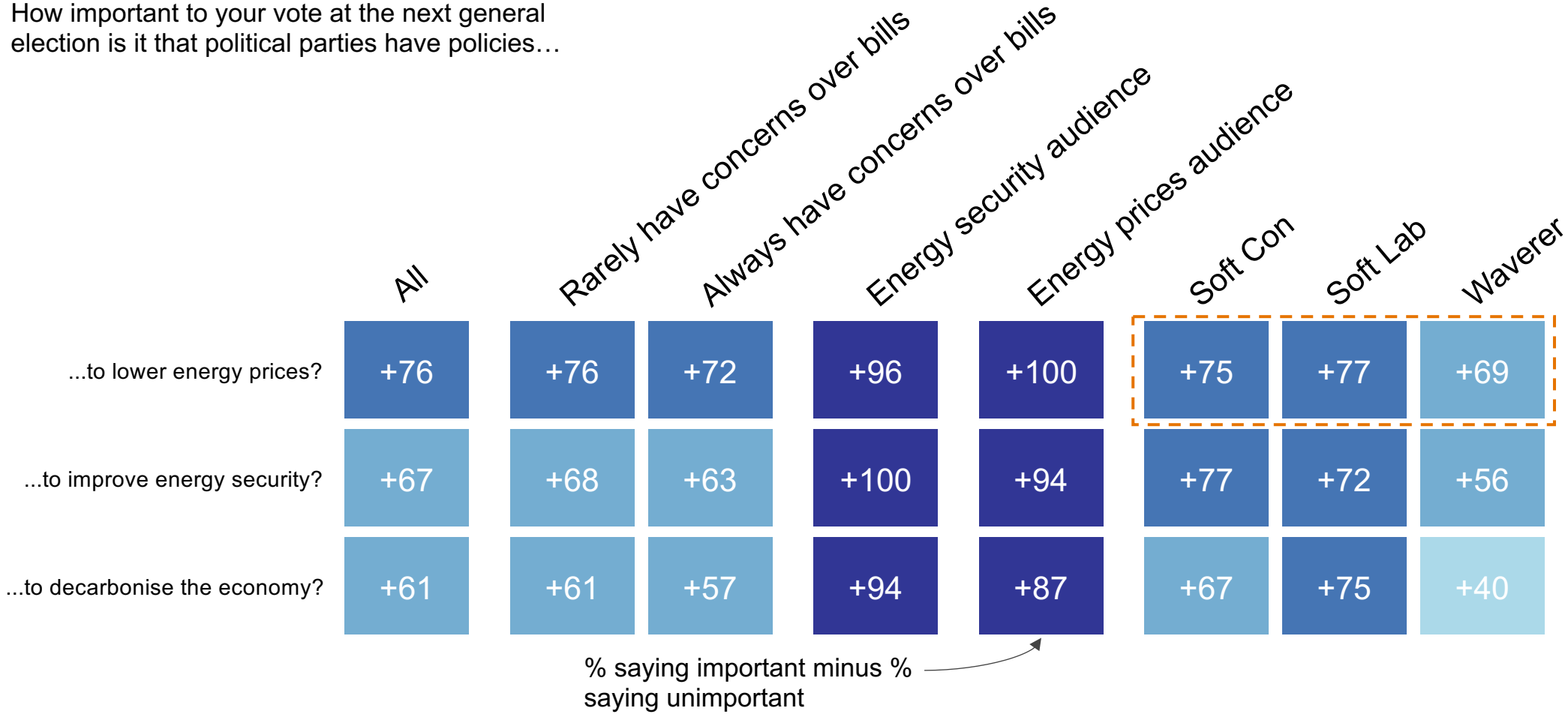
Policies around energy are very important to 1 in 3 voters

How important to your vote at the next general election is it that political parties have policies...



Policies to lower energy prices are overwhelmingly important to target voters for both parties

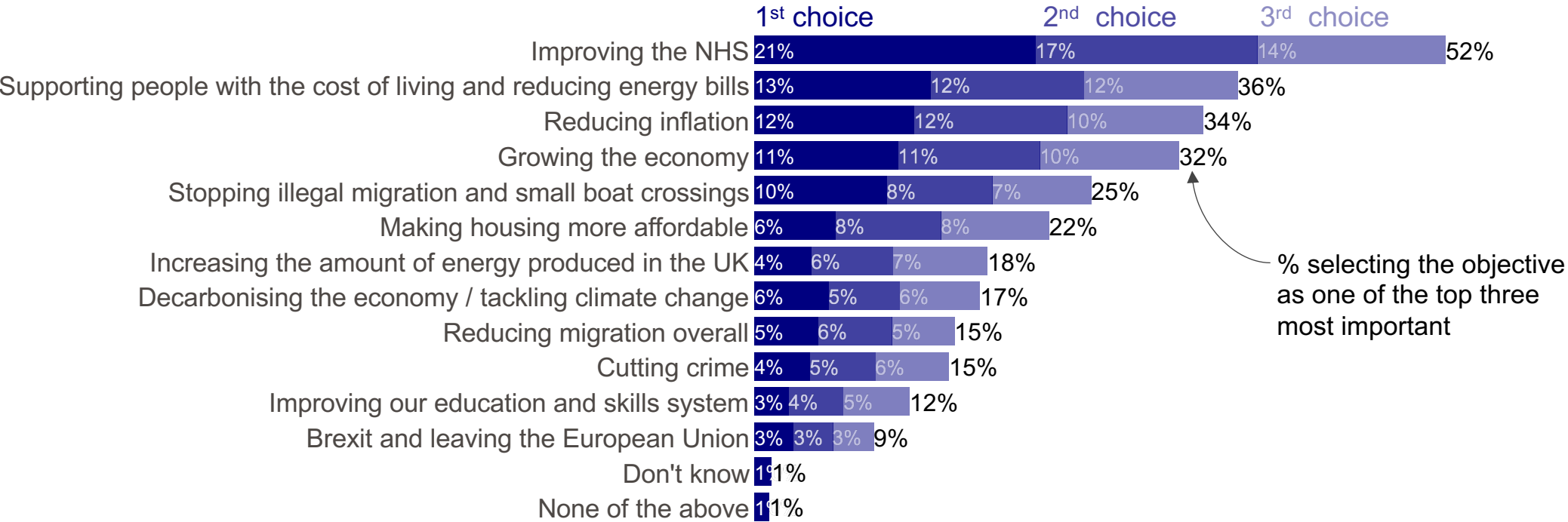
How important to your vote at the next general election is it that political parties have policies...



Q26. How important to your vote at the next general election is it that political parties have policies to deliver clean energy infrastructure to improve energy security? Q27. How important to your vote at the next general election is it that political parties have policies to deliver clean energy infrastructure to lower energy prices? Q28. How important to your vote at the next general election is it that political parties have policies to deliver clean energy infrastructure to decarbonise the economy?

Reducing energy bills are a bigger priority than decarbonising the economy and improving energy security

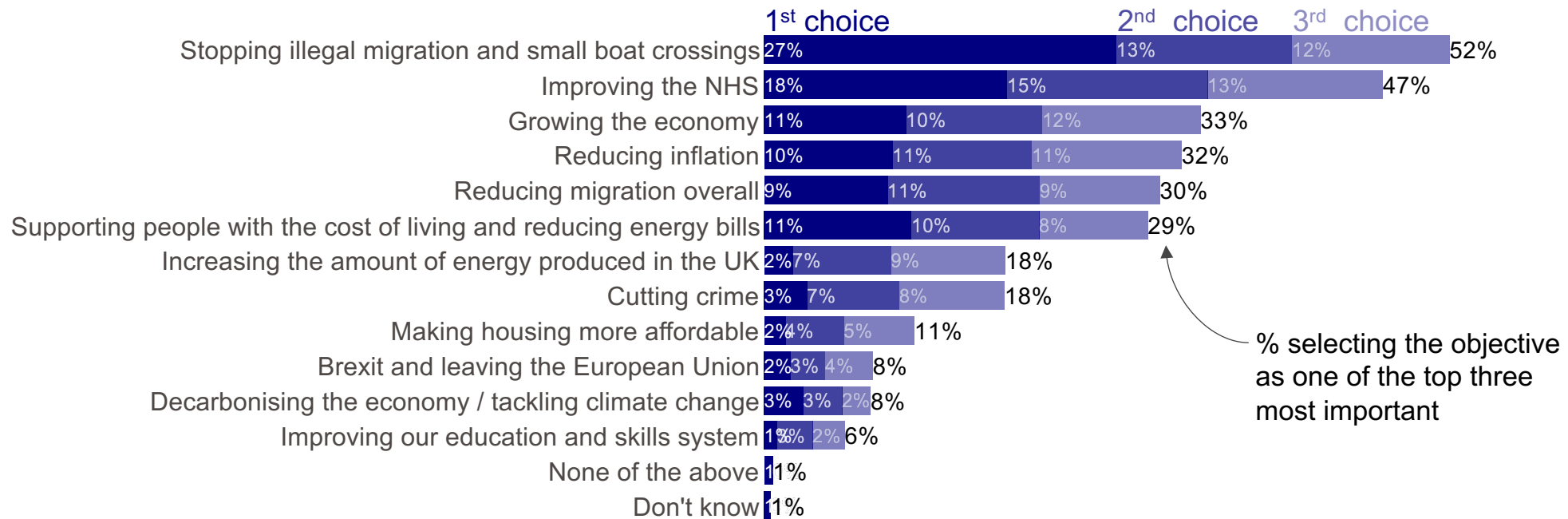
What are the most important issues that will decide how you vote at the next election? Choose up to three in order of priority.



1 in 3 waverers say that reducing energy bills is a key priority

What are the most important issues that will decide how you vote at the next election? Choose up to three in order of priority.

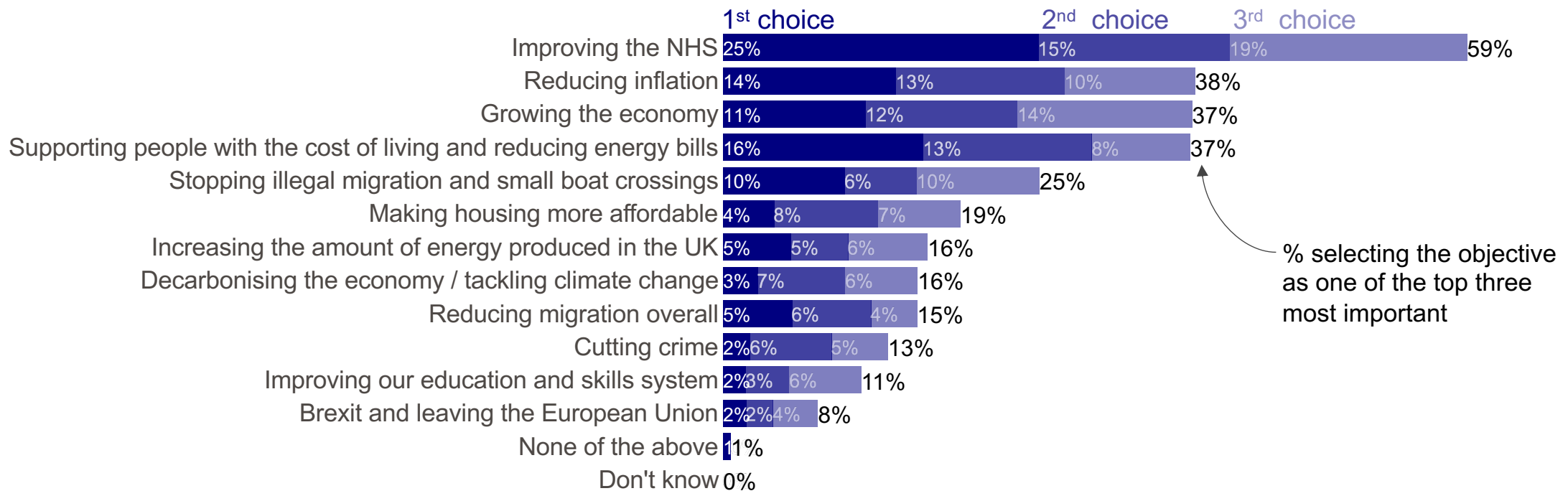
Waverer



16% of switchers say that decarbonising the economy and improving energy security is a key priority

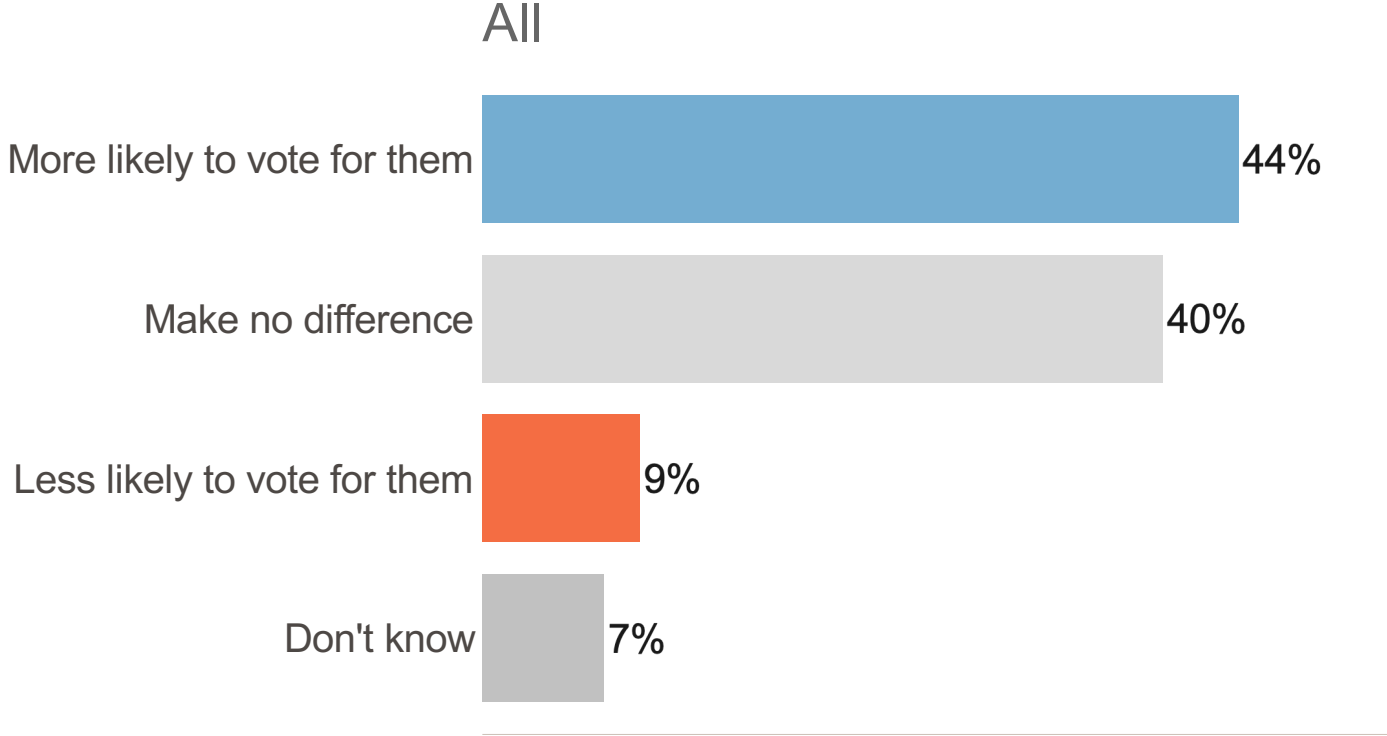
What are the most important issues that will decide how you vote at the next election? Choose up to three in order of priority.

Switcher



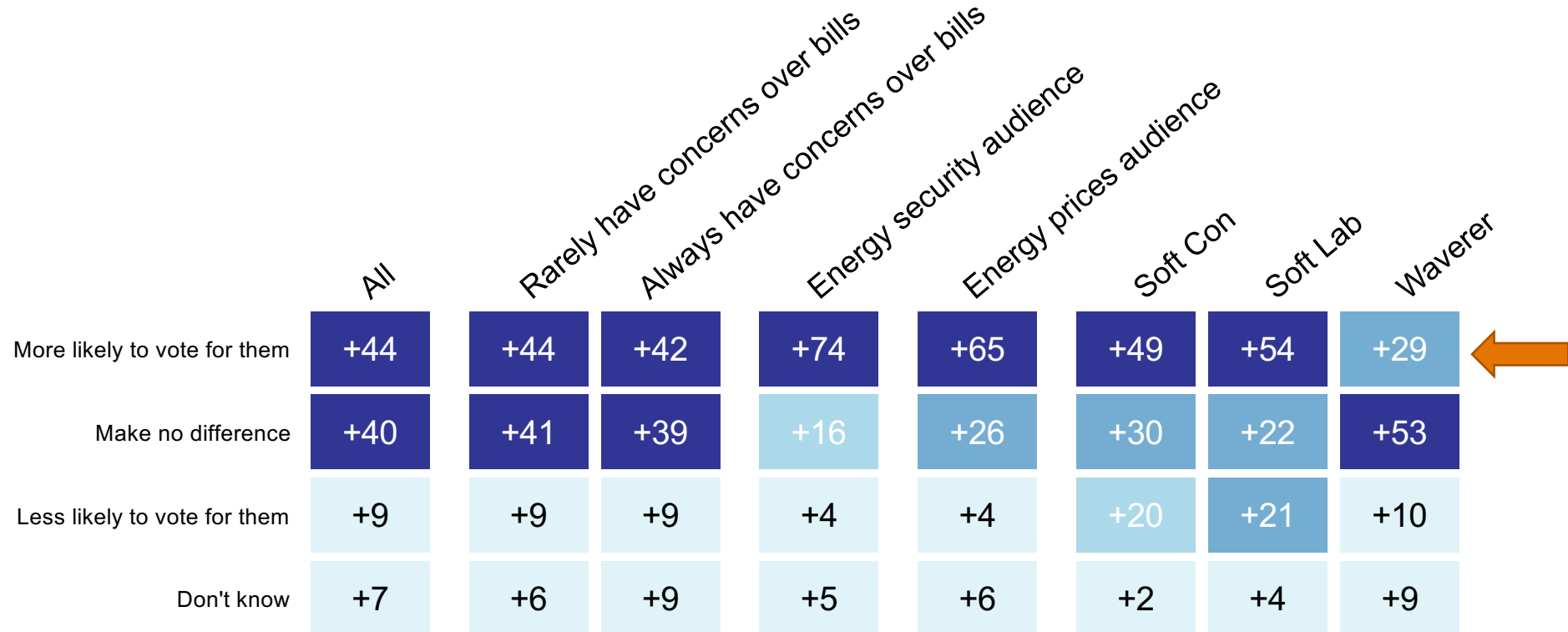
Less than 1 in 10 voters would be more likely to support an MP supporting local energy investment

If a candidate to become your local MP campaigned for clean energy investment in your area/region, would that make you...



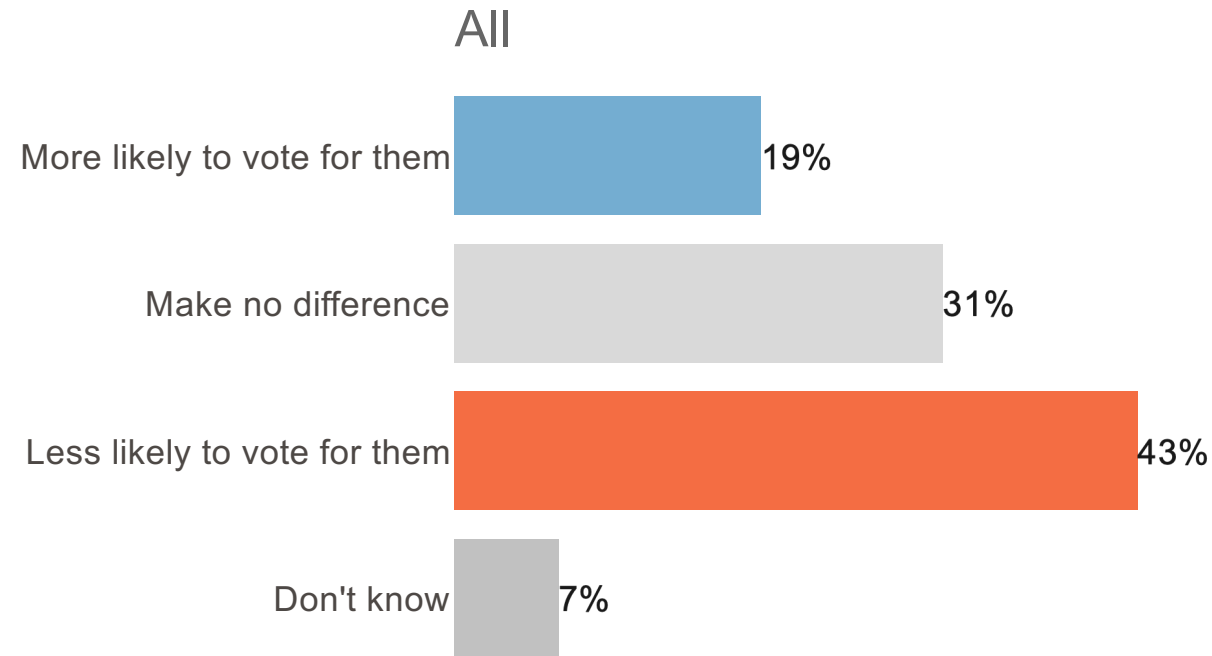
1 in 3 Waverers say they are more likely to vote for an MP if they campaigned for local clean energy investment

If a candidate to become your local MP campaigned for clean energy investment in your area/region, would that make you...



4 in 10 voters say they would be less likely to vote for a candidate opposing local energy investment

If a candidate to become your local MP campaigned against clean energy investment in your area/region, would that make you...



Soft Conservative and Labour voters are torn between supporting or opposing a candidate who campaigned against clean energy investment in region, however waverers are less likely to vote for a candidate in that scenario

If a candidate to become your local MP campaigned against clean energy investment in your area/region, would that make you...

	All	Rarely have concerns over bills	Always have concerns over bills	Energy security audience	Energy prices audience	Soft Con	Soft Lab	Waverer
More likely to vote for them	+19	+19	+20	+27	+24	+33	+39	+14
Make no difference	+31	+32	+34	+12	+17	+27	+19	+45
Less likely to vote for them	+43	+44	+38	+58	+54	+37	+38	+33
Don't know	+7	+6	+8	+3	+4	+3	+4	+9



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