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FROM SUPPORT TO SCRUTINY

HOW PUBLIC EXPECTATIONS OF RENEWABLE ENERGY ARE CHANGING

BRITAIN'S ENERGY TRANSITION IS ENTERING A NEW PHASE

For many years, public debate focused on whether renewable energy should play a significant role in the UK's future energy mix. That question now appears largely settled. The findings in this report show strong support for renewable energy across the country, with 64% of Britons expressing a positive view of renewables and 44% believing the transition is happening too slowly.

Public expectations are evolving alongside that support. Renewable energy is being viewed less as an emerging technology and more as critical national infrastructure.

At Eland Cables, we work across many of the infrastructure projects helping to support the UK's changing energy landscape, from renewable generation and energy storage through to the transmission and distribution networks that connect power where it's needed.

We commissioned this research to better understand how the public views that transition, what confidence exists in the direction of travel, and where concerns remain.

The results reveal a public that is broadly supportive of renewable energy, but also more focused on what it will deliver. People want affordable energy, reliable supply and confidence that the infrastructure being built today will continue to perform for decades to come. Those expectations are reasonable. They are the expectations people place on any infrastructure that underpins daily life and economic growth.

The data also reminds us that public support should not be taken for granted. As renewable infrastructure becomes more visible within communities, people naturally ask more questions about its local impact, its value and its long-term contribution. That scrutiny is a sign of engagement, not rejection.

For the energy sector, the task now is to translate support into confidence. That means delivering the infrastructure, performance and long-term resilience people expect from a modern energy system.

Jean-Sébastien Pelland
Executive Director, Eland Cables

About the research
To better understand how public attitudes towards renewable energy are evolving, Eland Cables commissioned independent research among UK adults. The study examined support for renewable energy technologies, confidence in their ability to deliver affordable, reliable and secure electricity, attitudes towards renewable infrastructure in local communities, and views on the UK's future energy mix.

Methodology: Research was conducted by YouGov among 2,142 UK adults between 9 and 10 July 2026.
The survey was carried out online, and results were weighted to be representative of the UK adult population (18+).

Public attitudes towards renewable energy are often framed as a debate between support and opposition, but the results of this research suggest something rather different.

Support for renewable energy remains strong, and backing for major renewable technologies is consistently high. Offshore wind commands backing from three-quarters of the public (75%), and almost two-thirds support onshore wind (65%) and three-in-five support large-scale solar developments (61%). Additionally, 44% believe the transition to renewable energy is happening too slowly, compared with just 18% who think it is moving too quickly.

Support, however, is only part of the picture.

Half of Britons (51%) doubt renewable energy will provide affordable energy costs over the next decade. The same proportion question whether it can generate enough electricity to meet future UK demand. Nearly half (46%) are unconvinced renewables will deliver the energy security the country requires.

This gap between support and confidence runs throughout the research. Renewable energy is no longer being judged solely on its environmental credentials. It is increasingly being assessed as critical national infrastructure.

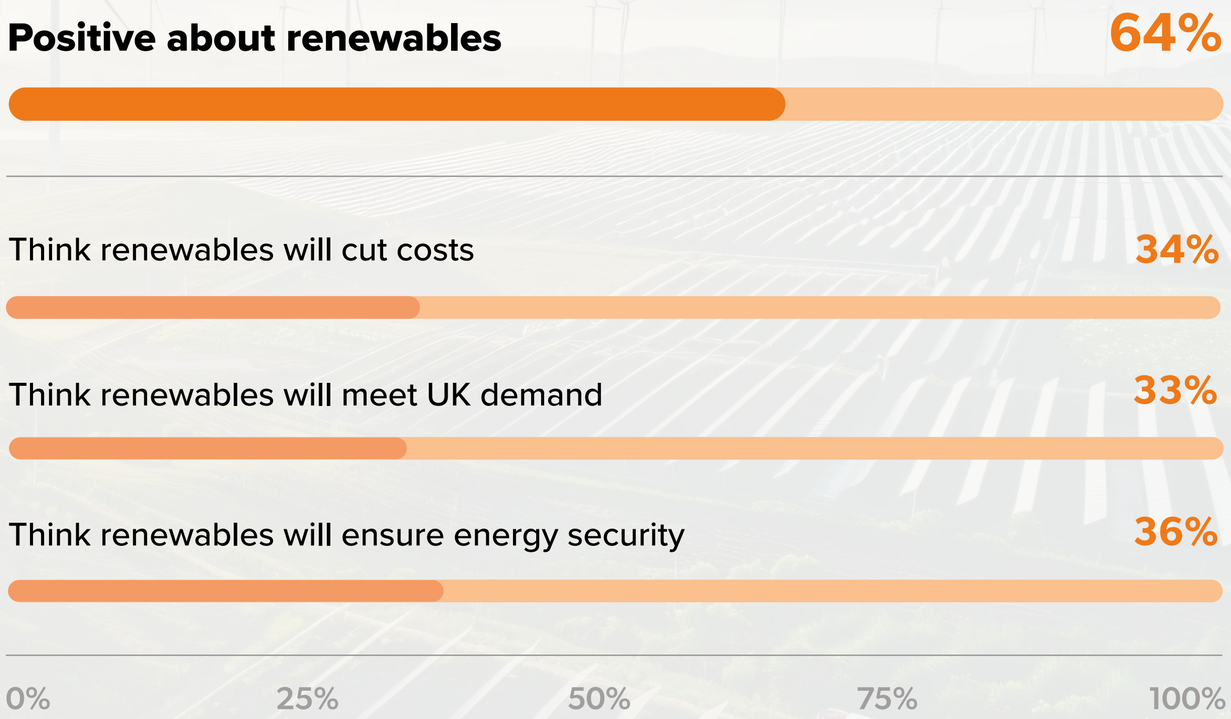
The research also challenges some common assumptions about opposition to new infrastructure. Support for renewable developments declines when projects are proposed closer to home but remains positive across every major technology tested. Rather than reflecting widespread resistance, the data points to a public that becomes more discerning as infrastructure becomes more visible and tangible within local communities.

Age is another important factor. Younger Britons are the strongest supporters of renewable energy and the most optimistic about its future potential. Yet they also become more selective when projects move from the national level to the local level, suggesting that scrutiny and support often exist side by side.

The evidence also indicates that many people are thinking beyond individual technologies altogether. Although renewable energy receives broad support, nuclear power emerges as the UK's most selected priority energy source (21%). This suggests the public is becoming more focused on the overall performance of the energy system, rather than viewing technologies in isolation.

Expectations are becoming more demanding. Renewable energy has largely won public support. The challenge now is not acceptance, but delivery. As renewables become a larger part of Britain's energy future, success will be judged by whether the wider system can deliver reliable, affordable and secure energy at the scale people expect.

BRITAIN SUPPORTS RENEWABLE ENERGY MORE THAN IT TRUSTS RENEWABLE ENERGY



KEY FINDINGS AT A GLANCE

Key takeaway

Britain has largely accepted renewable energy as part of its future. Confidence in what it will deliver remains more fragile. The challenge facing the sector is increasingly about proving performance rather than winning support.

64% SUPPORT RENEWABLE ENERGY

Nearly two-thirds of Britons feel positive about renewable energy sources, compared with just 12% who feel negative.

44% THINK THE TRANSITION IS TOO SLOW

More than twice as many people believe the shift to renewable energy is happening too slowly (44%) than too quickly (18%).

51% DOUBT RENEWABLES WILL MEET FUTURE ENERGY NEEDS

Just 33% believe renewables are likely to generate enough electricity to meet future UK demand in the next decade, while 51% believe they are unlikely to do so.

CONFIDENCE LAGS BEHIND SUPPORT

Although 64% feel positive about renewable energy, 51% doubt it will lower energy costs, 46% doubt it will provide energy security and 44% doubt renewable systems can perform consistently throughout the year.

SUPPORT REMAINS POSITIVE, EVEN LOCALLY

Support falls when projects are proposed closer to home, but remains positive across all major technologies tested. Offshore wind support falls from 75% nationally to 67% locally, and onshore wind falls from 65% to 59%.

YOUNG PEOPLE ARE THE STRONGEST SUPPORTERS AND THE MOST DEMANDING

Among 18-24-year-olds, 86% feel positive about renewable energy and 60% believe the transition is happening too slowly. Yet support for major renewable developments also drops noticeably when projects are proposed in their local area.

RENEWABLES HAVE PASSED THE LEGITIMACY TEST

For much of the past two decades, the public debate around renewable energy centred on a fundamental question: should renewable technologies play a major role in the UK's energy future?

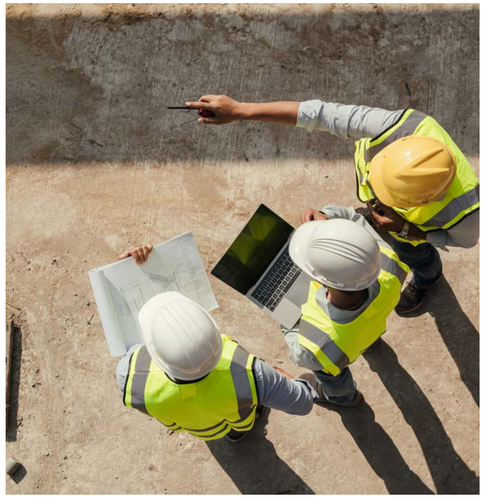
The responses from this research suggest that debate has largely moved on. Nearly two-thirds of Britons (64%) feel positive about renewable energy sources, compared with just 12% who feel negative. At the same time, 44% believe the transition to renewable energy is happening too slowly, compared with just 18% who think it is happening too quickly.

These aren't the attitudes of a country still debating whether renewable energy should exist. They reflect a growing focus on how renewable energy should be developed and what it should deliver.

Support for new renewable infrastructure reinforces this picture. Large-scale solar developments are supported by 61% of respondents nationally, rising to 65% for onshore wind and 75% for offshore wind. Opposition remains a minority position across all three technologies.

Public attitudes towards the UK's future energy priorities tell a similar story. When asked which electricity source the UK should prioritise, respondents did not rally around fossil fuels. Coal was selected by just 2% of the public and natural gas by 6%. Instead, support was spread across a range of lower-carbon technologies. Nuclear power ranked first at 21%, followed by solar energy at 19% and offshore wind at 18%.

The ranking itself is less important than the broader picture. Support is spread across several low-carbon technologies, with nuclear, solar and offshore wind all receiving substantial backing. Public support isn't concentrated around a single preferred technology. Rather, many people appear comfortable with a more diverse energy mix that combines different technologies to deliver reliable and secure electricity.



Renewable energy appears to have crossed an important threshold in public opinion. It's no longer viewed as a niche technology or a future ambition. For many people, it has become an established part of Britain's energy future.

As a result, attention is turning towards how renewable energy is delivered and the outcomes it can achieve.

THE CONFIDENCE GAP

Public support for renewable energy is strong, but confidence in what it can deliver is considerably less certain.

The gap between support and confidence is one of the defining themes of the research. Many people remain unconvinced that renewable energy can deliver the outcomes expected of a modern energy system.

Half of respondents (51%) believe renewable energy is unlikely to provide affordable energy costs over the next decade. The same proportion doubt renewables will generate enough electricity to meet future UK demand. Almost half (46%) are unconvinced renewable energy will provide the UK with energy security from global conflict and market changes, and 44% question whether renewable systems can perform consistently throughout the year.

Support versus confidence

The contrast is significant. Three-quarters of the public support offshore wind development (75%) and nearly two-thirds support renewable energy overall (64%), yet confidence falls sharply when people are asked about outcomes such as costs, reliability and national energy needs.

This suggests renewable energy is being judged differently than it might have been a decade ago.

Public attitudes appear less focused on whether renewable technologies are environmentally beneficial and more focused on whether they can perform as part of a reliable national energy system. In many respects, people are applying the same standards to renewables that they would apply to any other form of critical infrastructure.

The concerns highlighted by the research are practical rather than ideological. When people think about renewable energy, they appear to be asking familiar infrastructure questions: Will it keep bills under control? Will it generate enough power when demand is high? Will it provide security during periods of international uncertainty? Will it perform consistently over time?

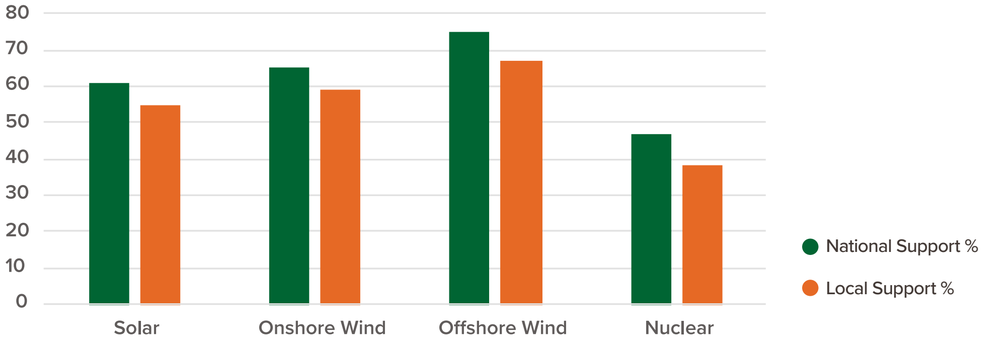
A further insight from the research is that these views are often being formed against a backdrop of relatively limited awareness of the UK's current energy mix. When asked what powers the National Grid today, only 15% of Britons believe most or all electricity comes from renewable sources. One-third (33%) believe most or all electricity comes from non-renewable sources, while 32% are unsure. Even in Wales, where awareness is highest, only 26% believe the grid is predominantly powered by renewables.

This does not explain the confidence gap, but it does provide important context. Public expectations of renewable energy are evolving at the same time as many people remain uncertain about the role renewables already play within the electricity system today.

Viewed through that lens, scepticism should not necessarily be interpreted as opposition. Support remains comfortably higher than opposition across major renewable technologies, ranging from 61%-75% support compared with 8-19% opposition, and 44% of Britons believe the transition should be happening more quickly.

The data suggests that many people support the destination but remain unconvinced about aspects of the journey. Affordability, reliability and energy security have become central to how renewable energy is evaluated, reflecting a public that increasingly views renewables through the lens of infrastructure rather than innovation.

INFRASTRUCTURE COMES HOME



Support declines when projects move closer to home, but remains positive across every major energy technology tested.

Public support for renewable infrastructure remains strong at a national level. The more revealing question is what happens when projects are proposed within local communities.

The research shows that support does decline when renewable energy projects move from the national stage to the local level. However, the fall is relatively modest and, importantly, support remains positive across every major technology tested.

Offshore wind provides perhaps the clearest example. While support falls from 75% nationally to 67% locally, more than two-thirds of Britons still support projects even when they are proposed closer to home. Similar patterns can be seen across solar (61% vs 55%) and onshore wind (65% vs 59%).

This is not the sharp collapse in support often associated with so-called "Not In My Back Yard" attitudes. If opposition to renewable infrastructure was primarily driven by local resistance, support would be expected to fall much more dramatically.

Instead, the research suggests something more nuanced. As infrastructure becomes more visible and tangible, people appear to apply greater scrutiny. Questions around local impact, community benefit and long-term value become more important. Support remains, but it becomes more conditional.

That pattern can also be seen in attitudes towards the physical impact of infrastructure. When asked about the potential effects of increased renewable development, half of Britons (50%) believe it would have a negative impact on the visual landscape and accessible green spaces. Just 13% believe it would have a positive effect.

Rather than reflecting opposition to renewable energy itself, these concerns suggest the public expects infrastructure projects to justify their presence, particularly when they alter places people know and care about.

The property effect

Attitudes also vary depending on how people relate to the places where infrastructure is built.

Homeowners are significantly more likely than renters to express concern about the impact of renewable infrastructure on landscapes and green spaces. More than half of homeowners (55%) believe renewable infrastructure would have a negative effect on the visual landscape, compared with 43% of renters.

The difference is notable because it points to how local context shapes perceptions of energy projects. Homeowners may feel a stronger sense of long-term connection to their local area, making them more sensitive to visible changes in the surrounding environment. That doesn't translate into outright opposition to renewable energy though.

Despite concerns, three-quarters of homeowners (75%) support offshore wind developments nationally, while almost two-thirds support both onshore wind (65%) and large-scale solar projects (63%). However, it does suggest that as infrastructure becomes more embedded within communities, questions around design, location and community impact will continue to play an important role in shaping public opinion.

The survey points to a public that is broadly supportive of renewable energy infrastructure, but more attentive to how and where it is delivered. As projects move closer to home, support is accompanied by higher expectations and greater scrutiny.

THE GENERATION **DRIVING CHANGE**

	18-24 %	25-49 %	50-64 %	65+ %
Positive about renewables	86	70	59	51
Transition happening too slowly	60	46	44	32
Renewables likely to provide affordable energy costs	57	38	27	23
Renewables likely to be as reliable as non-renewable generation	59	48	36	35

Younger adults are consistently more positive about renewable energy and significantly more confident in its ability to deliver affordability and reliability than older generations.

No demographic group expresses stronger support for renewable energy than young adults.

Among 18-24-year-olds, 86% feel positive about renewable energy, significantly higher than the national average of 64%. They are also more likely than any other age group to believe the UK should be moving faster, with 60% saying the transition to renewable energy is happening too slowly.

Support is only part of the story. Younger adults are also considerably more confident in what renewable energy can achieve. The generational divide is particularly clear when attitudes move from support to performance, with younger Britons expressing far greater confidence in the ability of renewables to deliver future outcomes.

More than half of 18-24-year-olds believe renewable energy is likely to lower energy costs over the next decade, compared with just 23% of those aged over 65. Similarly, 59% of young adults believe renewables can become as reliable as conventional energy sources, compared with 35% of over-65s.

Taken together, these findings suggest younger Britons aren't simply more supportive of renewable energy, they are more confident that it can deliver the outcomes many people expect from the future energy system.

However, that enthusiasm does not translate into unconditional support.

When renewable infrastructure is proposed locally, support among younger people falls more sharply than many might expect. National support for solar developments among 18-24-year-olds stands at 80% but drops to 67% when projects are proposed in their local area. Support for onshore wind falls from 80% to 64%, and offshore wind support declines from 80% to 66%.

These declines are still being measured from exceptionally high starting points. Even after support falls, a clear majority of young adults continue to support local renewable infrastructure.

What the data reveals is not resistance, but scrutiny. The generation most enthusiastic about renewable energy also appears to place high expectations on how infrastructure is planned, delivered and integrated into local communities. Support remains strong, but it becomes more discerning when projects move from national ambition to local reality.

In that sense, younger generations are becoming stakeholders rather than cheerleaders. They are more supportive of renewable energy, more confident in its potential and more invested in its success. As renewable infrastructure becomes a larger part of Britain's energy system, their views may offer an early indication of how public expectations are evolving more broadly.

Younger adults are consistently more positive about renewable energy and significantly more confident in its ability to deliver affordability and reliability than older generations.

BRITAIN'S ENERGY PRIORITIES

21%	19%	18%	8%	6%	5%	2%
NUCLEAR POWER	SOLAR ENERGY	OFFSHORE WIND	HYDROPOWER	NATURAL GAS	ONSHORE WIND	COAL

Public support is spread across several low-carbon technologies, suggesting many people are thinking less about individual technologies and more about overall system performance.

Much of the public debate around energy policy is often framed as a choice between competing technologies. Nuclear versus renewables. Solar versus wind. Established energy sources versus emerging alternatives. The survey responses suggest many Britons may see things rather differently.

When asked which electricity source the UK should prioritise, nuclear power ranked first at 21%, followed closely by solar energy at 19% and offshore wind at 18%. Hydropower received 8%, and natural gas attracted 6%. Coal was selected by just 2% of respondents.

The overall pattern of responses is perhaps more revealing than the ranking itself.

Support remains spread across multiple lower-carbon technologies. Nuclear, solar and offshore wind all attract substantial backing, while support for renewable infrastructure remains strong throughout the wider survey. Three-quarters of Britons (75%) support offshore wind development nationally, with 65% supporting onshore wind and 61% supporting large-scale solar developments.

This suggests the public may be less focused on identifying a single winning technology and more interested in whether the overall energy system can deliver reliable, affordable and secure electricity.

That interpretation also helps explain some of the apparent tensions elsewhere in the research. Support for renewable energy remains strong, but confidence in its ability to meet future demand, reduce costs and strengthen energy security is less certain. Against that backdrop, support for nuclear power may reflect a desire for complementary technologies that work together rather than competing visions of the future.

Viewed through that lens, the debate appears to be shifting from which technology should win? to which combination of technologies can deliver the outcomes people expect?

The nuclear divide

Attitudes towards nuclear power reveal one of the sharpest demographic divides in the study, contrasting with the relatively consistent support seen for renewable energy across many groups.

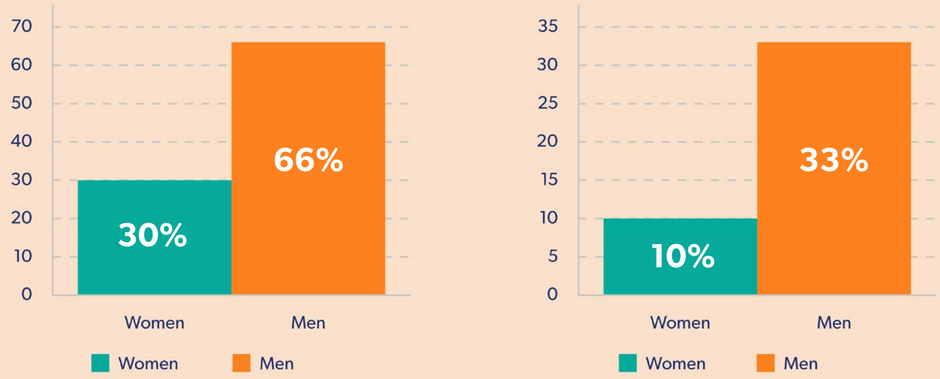
Two-thirds of men (66%) support the development of nuclear power stations in the UK, compared with just 30% of women. A similar pattern emerges when respondents are asked which energy source the country should prioritise. One-third of men (33%) select nuclear power, compared with only 10% of women.

Few other findings in the survey reveal differences of this scale.

The divide highlights how attitudes towards individual technologies can vary significantly between demographic groups, even where there is broader agreement on the need for a secure and reliable energy system.

What remains consistent across the research is that most people are not placing all their expectations on a single technology. The public appears to favour an energy system that combines different sources of generation, each contributing to affordability, reliability and long-term energy security.

Public debates often focus on technology preferences, yet the evidence suggests people are more focused on outcomes. Views may differ on the role of nuclear, solar or wind, but affordability, reliability and energy security remain the common measures against which the wider system is judged.



Attitudes towards nuclear power reveal one of the most significant demographic divides anywhere in the research.

WHAT THIS MEANS FOR THE ENERGY SECTOR

Generating renewable electricity is only part of the challenge.

The wider system must also be capable of moving that power efficiently, reliably and consistently to where it is needed. As renewable energy becomes a larger part of the UK's energy mix, attention naturally extends beyond generation assets to the networks that support them. Transmission, distribution, grid resilience and long-term operational performance all play an important role in shaping public confidence.

Success will depend on the whole system

Renewable generation may be the most visible part of the transition, but public confidence will ultimately be shaped by the performance of the entire energy system.

A wind farm can generate electricity successfully, yet the benefits will not be fully realised without the infrastructure required to transport that power efficiently and reliably across the network. The same is true of solar developments, energy storage projects and future electrification initiatives.

As renewable energy becomes a larger part of the UK's energy mix, greater attention falls ovn the networks and infrastructure responsible for connecting, transporting and distributing power.

Most people are unlikely to distinguish between generation, transmission and distribution. They judge the system by its outcomes. They expect electricity networks to operate reliably, withstand disruption and continue performing over decades of service.

That places greater emphasis on the long-term performance of infrastructure assets throughout the energy network. Reliability is no longer simply an engineering objective. It becomes part of how people judge whether the wider energy system is delivering on its promises.

Confidence is built through performance

The gap between support for renewable energy and confidence in what it can deliver runs throughout this research.

Closing that gap will depend less on ambition and more on performance. Reliable networks, resilient infrastructure and consistent delivery over time will play a critical role in shaping public confidence.

For companies across the energy supply chain, this extends beyond generating electricity. It includes designing, building and maintaining the infrastructure that allows power to be transmitted, distributed and relied upon for decades to come.

Britain's renewable energy challenge is no longer about proving that renewable energy has a place in the country's future. It is about demonstrating that the wider system can deliver the outcomes people expect.