

# Public attitudes to net zero emissions in the UK

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A study by Copper Consultancy

# Foreword: Why net zero?

In June 2019 the UK Parliament legislated to bring all greenhouse gas emissions to 'net zero' by 2050, compared with the previous target of at least 80% reduction from 1990 levels. Some clear messages arise from Copper's study, including that members of the public are generally supportive of net zero and action to halt climate change, but that such action should be driven and paid for at government level.

Perhaps unsurprisingly, the public seem keen to embrace new green/public transport infrastructure in their local area, but would be less keen to pay for it. Also, there appears to be a lack of understanding as to the range of transport and energy types that are being deployed to help us decarbonise.

The general consensus from a recent roundtable discussion was that the government needs to devise a roadmap to set out tangible and understandable targets to be met in stages from now until 2050.

The recent Heathrow Third Runway legal challenge (and the domestic and international climate change movement generally) could have ramifications for other infrastructure projects across sectors.

Infrastructure promoters must, lead the way and drive innovation in seeking to reduce or eliminate the carbon impacts of transport, energy and utility developments. They must be bold and ambitious in analysing every element of a development scheme to see where sustainability/decarbonising measures (solar panels on buildings are a must) can be incorporated, even if they cost a bit more.

The government has no choice but to rise above party politics and legislate to drive immediate change; there is no doubt the prospective ban on the sale of diesel and petrol cars will have a profound and immediate impact on the mix of car sales and on air quality.

**Richard Marsh**  
Partner, BDB Pitmans

**“It appears that the public groundswell towards fighting climate change is growing exponentially and I am hopeful that if Copper’s survey was carried out again in a year’s time the results would show much greater public knowledge of green transport and energy and a greater willingness to assume a personal responsibility to effect change.”**



BDB PITMANS

# Copper's study and key findings

The ongoing challenge of climate change has moved to the forefront of public consciousness because of the efforts of Greta Thunberg, Sir David Attenborough and Extinction Rebellion. In 2019 the UK became the first major economy in the world to commit to bringing all greenhouse gas emissions to net zero by 2050.

We asked the public what their views are on the viability of this target and what we need to do to reach net zero by 2050.

## We asked questions about:

- the public's support and confidence in achieving net zero by 2050
- what sectors they would prioritise for low carbon investment
- their willingness to pay for the changes that are required
- the lifestyle changes that they are personally willing to make

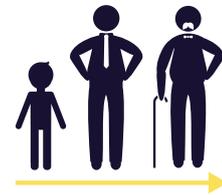
## The survey included:



**2004  
people surveyed**



**In England, Scotland, Wales  
and Northern Ireland**



**Full age range  
demographics**

## Key findings:



Though the public support net zero they believe that the UK is not doing enough to reach zero carbon emissions by 2050.



There is general lack of awareness of the different low carbon transport and energy technologies that have been developed and are currently available.



The public have an appetite for change at both a local and national scale. However, they feel it's government's responsibility to make the changes necessary, without further cost to them.



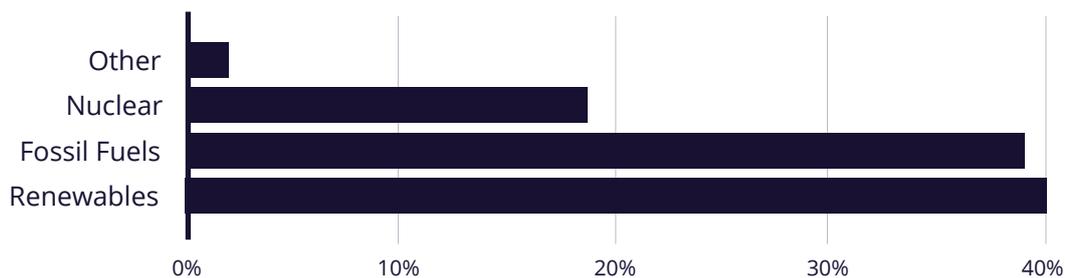
The public support a range of schemes being built within their own communities, as long as they benefit from them.

# How has the UK done so far?

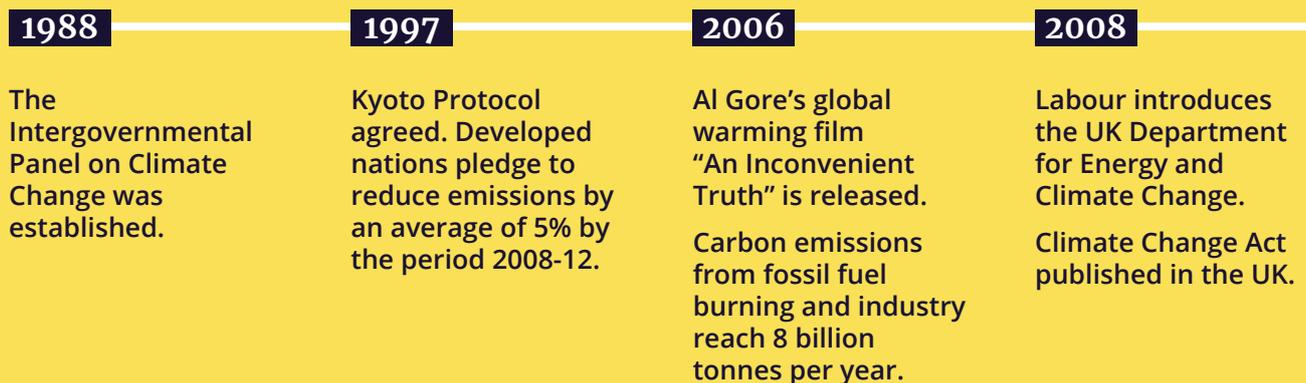
The UK is the 16th highest emitter in the world, generating 1% of the global CO2 emissions<sup>1</sup>. Since 1990, greenhouse gas emissions have fallen by 40% in the UK, more than in any other major advanced economy<sup>2</sup>. This reduction in emissions has been driven by the rise of renewable energy and its replacement of coal-fired power generation. In Q3 2019, UK renewables generated more electricity than fossil fuels for the first time<sup>3</sup>.

Emissions from the power sector have decreased by almost two-thirds, while in the transport sector they have stood still due to efficiency gains being balanced by increased demand. The UK has ambitions to significantly reduce emissions in the future and all infrastructure sectors will need to play a part in the country achieving net zero by 2050.

## UK electricity generation (Q3 2019)

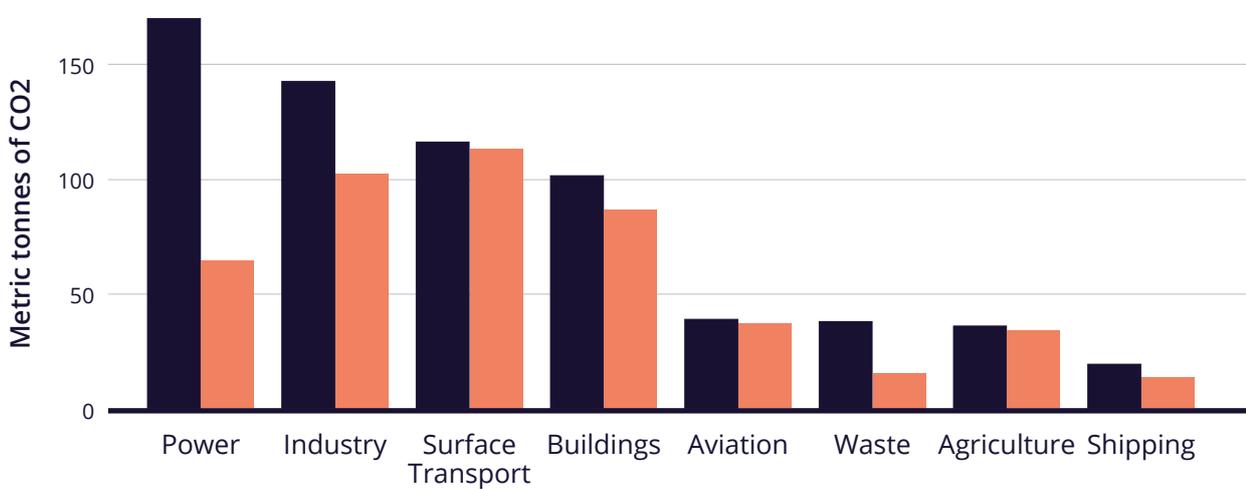


## Net Zero Journey



## Which sectors have generated the most CO2 emissions over the past 10 years?<sup>4</sup>

■ 2008  
■ 2018



1 International Energy Agency, Global Energy & CO2 Status Report, November 2019

2 Committee on Climate Change's report, Net Zero – The UK's contribution to stopping global warming, May 2019

3 Carbon Brief – Analysis: UK renewable generate more electricity than fossil fuels for first time. October 2019

4 BEIS, 2017 Greenhouse Gas Emissions: Final Figures. 2019

**2050**  
Net zero emissions?

**2009**

“Climategate” – emails at Climatic Research Unit, University of East Anglia, were hacked with a failed attempt at discrediting climate change research, ahead of the Copenhagen Summit.

**2013**

Renewable energies generated 15% of the UK's electricity.

**2015**

The Paris Agreement is ratified, setting targets for controlling global temperature increases.

**2019**

June: UK became the first major economy to set a target of net zero emissions by 2050.

October: UK renewables generate more electricity than fossil fuels for first time.

# Do the public want change?

The public support change and investment in low carbon infrastructure and technologies that will bring us closer to the net zero target. They particularly felt that our focus should be on greener transport, energy and manufacturing.



Transport



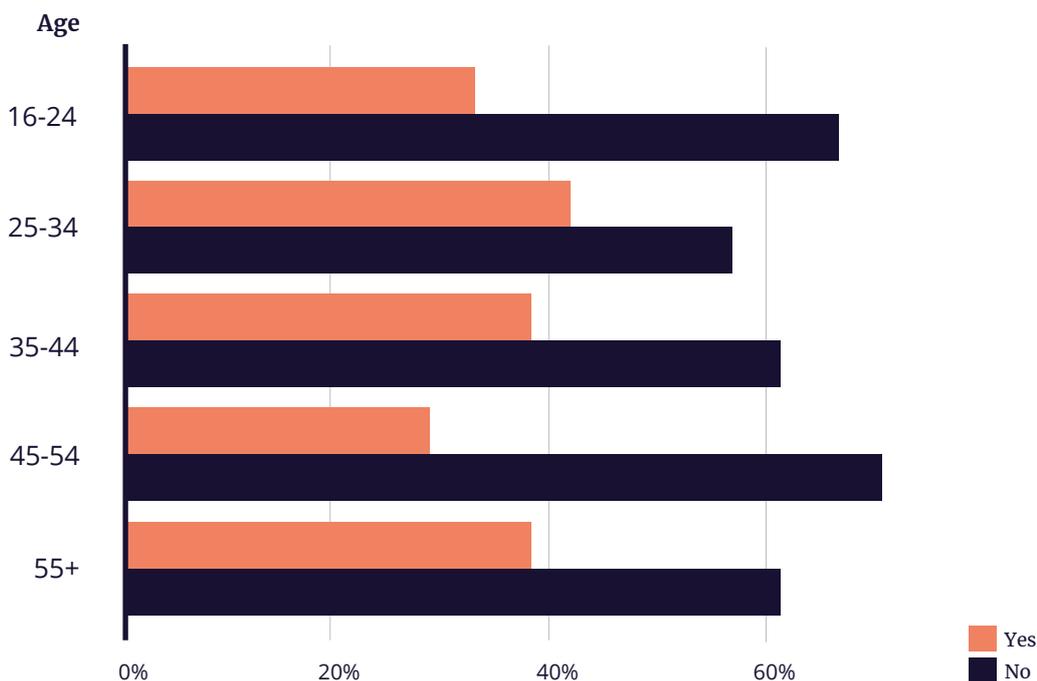
Energy



Manufacturing

## Do you believe that the UK is doing enough to achieve the net zero emission target by 2050?

Overall, 64% of respondents felt that we were not doing enough to make the necessary changes in time to meet the target by 2050.



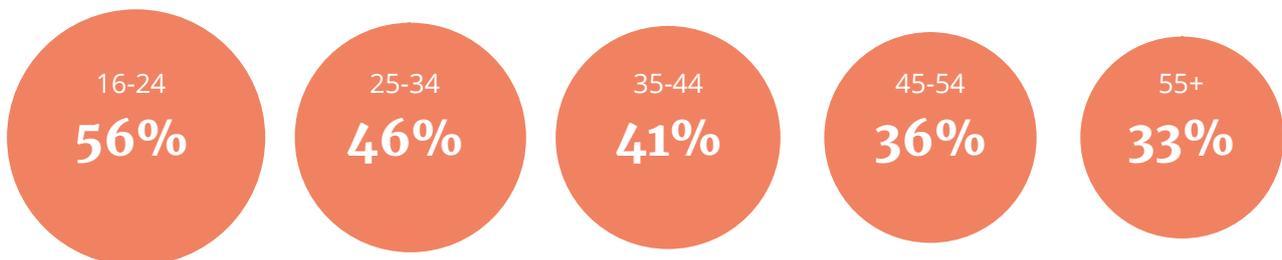
## Would you be willing to pay more tax to support investment in greener infrastructure?



While the public support investment in greener infrastructure, they feel that government should bear the costs. It's clear that any investment in the net zero agenda will need to be communicated openly so that the people understand the benefits and how progress will be made. And most importantly, people will want to know how the costs have been managed to limit their personal contribution via taxation or user charging.

## How did the different age groups feel about paying more tax?

Yes - responses shown by age group



**“People’s willingness to pay for low carbon power supply or transport options revolves around how it will affect their quality of life and fairness of who should pay, the consumer or the tax payer. And they aren’t confident that their personal investment will contribute to net zero.”**

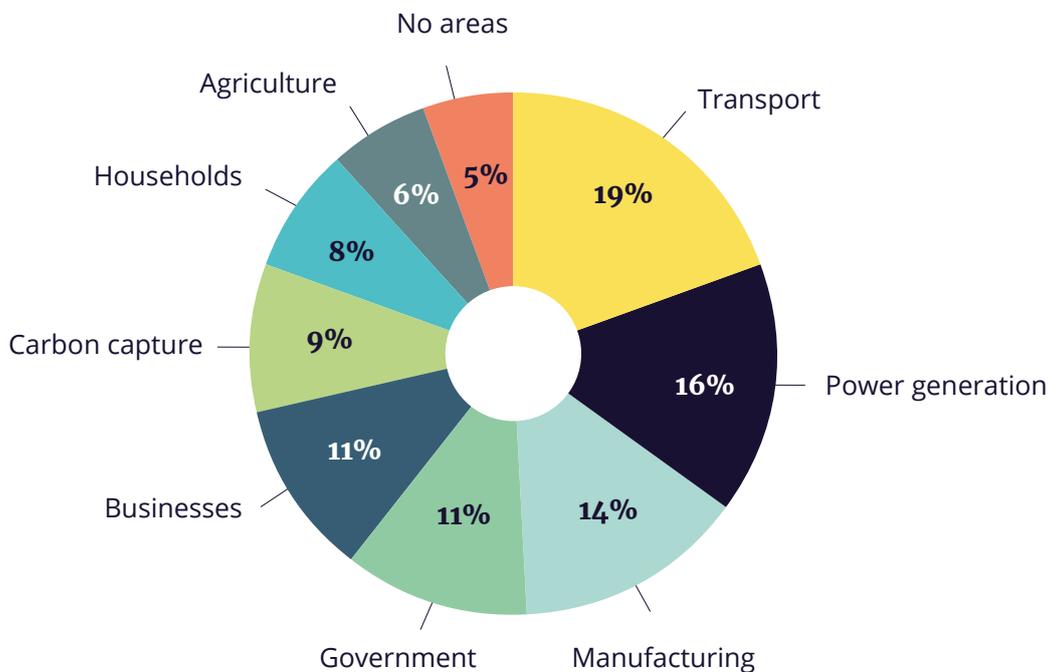
Natalyn Ala, Strategy Director - Major Projects, Copper Consultancy

# Where should we focus our efforts?

The public felt that our efforts should be focused on low carbon transport, energy and manufacturing to achieve net zero emissions by 2050. They felt that agriculture and their own personal and household choices were less important in reducing our emissions.

This could be because these areas are less visible or appear to make a smaller impact when compared with the others. Key is that we will need a systematic change with contributions from all industries and from everyone to make sufficient progress.

## What areas or industries do you feel we should focus our efforts to help meet the net zero target?



# How can the construction industry contribute to net zero 2050?

The construction industry represents 10% of UK carbon emissions and directly influences 47% of emissions through the infrastructure and built environment that it delivers and maintains. It involves mostly the transport sector - road, rail, aviation and ports - and manufacturing of concrete and steel.

The construction industry's contribution is multi-faceted and requires an integrated approach in developing our skills, procurement, design, products and materials and transport<sup>5</sup>.



**In the UK, heavy goods vehicles account for 5% of vehicle miles but 17% of greenhouse gas emissions.**



**Cement contributes about 10% of direct UK industrial emissions.**



**Iron and steel account for 17% of UK industrial emissions.**

**“In the construction industry we’ve just scratched the surface in addressing sustainability. Government’s promotion of low carbon at low cost hasn’t translated into the procurement and delivery of infrastructure projects where they are driven by constructive solutions with risk avoidance.”**

Steve Fox, Chief Executive, BAM Nuttall

# What are the public's low carbon energy priorities?

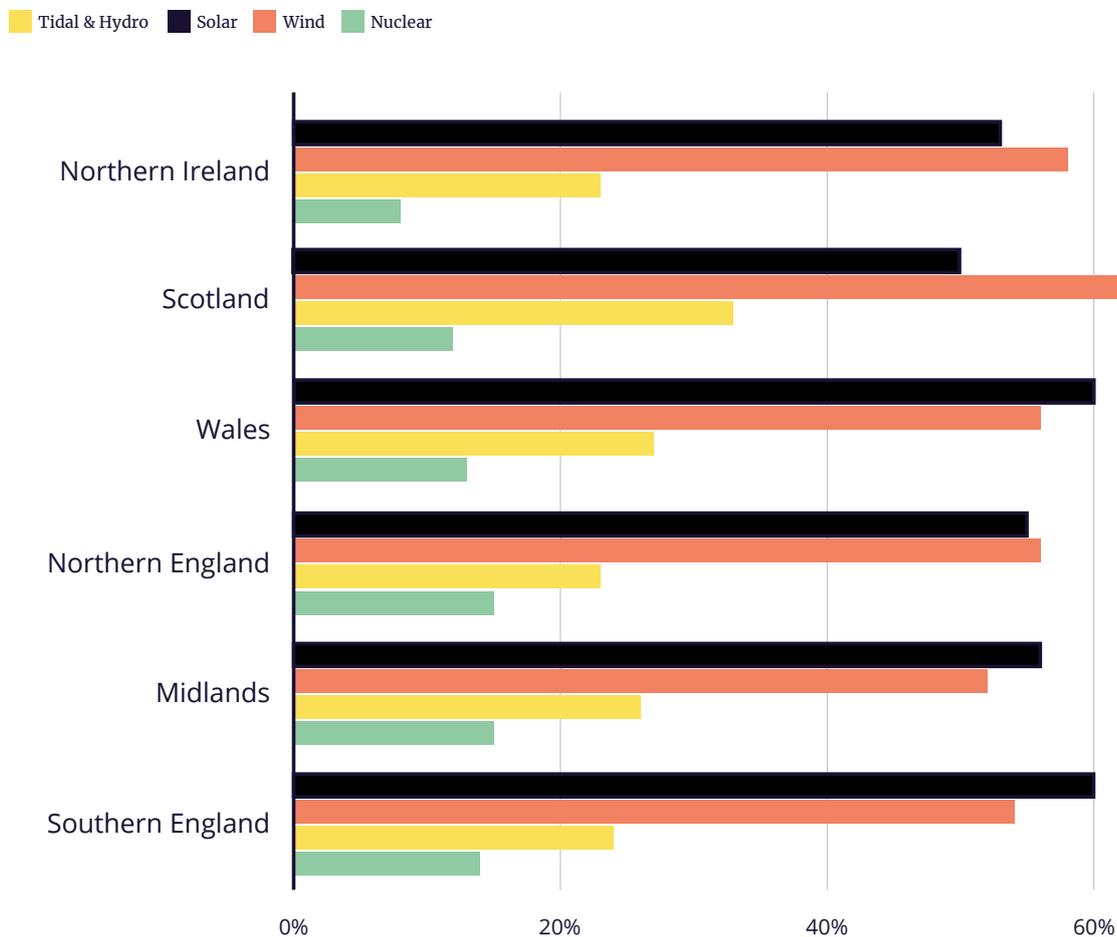
The public felt that our efforts should focus on the energy sector to make the greatest progress towards meeting net zero by 2050.

## Which low carbon power generation sources would you support?

Renewable energy sources from solar and wind received overwhelming support across the UK, with wind being more popular in the north and solar in the south.

Tidal, hydro and nuclear power were largely overlooked. The support for tidal and hydro power was low (below 30%) in all regions, except Scotland where most of the hydropower projects exist.

% of respondents that would choose solar, wind, hydro and tidal power, nuclear

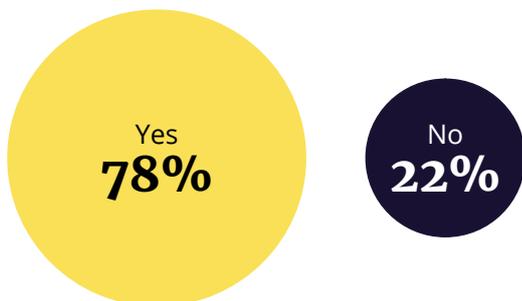


## How do the public feel about renewable energy to light and heat their homes?

A large percentage of those surveyed (78%) were supportive of wind or solar farms being built near their homes. However, 62% were not willing to fund such projects in their communities by paying more in their electricity and heating bills.

Of the small proportion of people who were willing to pay higher energy bills, over 60% would pay between 2% and 5% more.

Would you be willing to see a new windfarm or solar farm on land visible from your home?

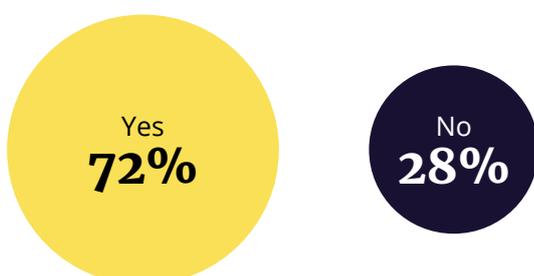


Would you be willing to pay more in your energy bill for low carbon choices?



If reasonably incentivised, would you invest in renewable technologies for your home?

The public made it very clear that if government provided a beneficial incentive, they would personally invest in renewable technologies for their homes, such as domestic solar, wind and ground source heat.



**“Nuclear power is critical for the UK to achieve its net zero target on greenhouse gas emissions. It can support the continued growth of renewable power in the UK and it’s vital contribution to our electricity mix should not be overlooked.”**

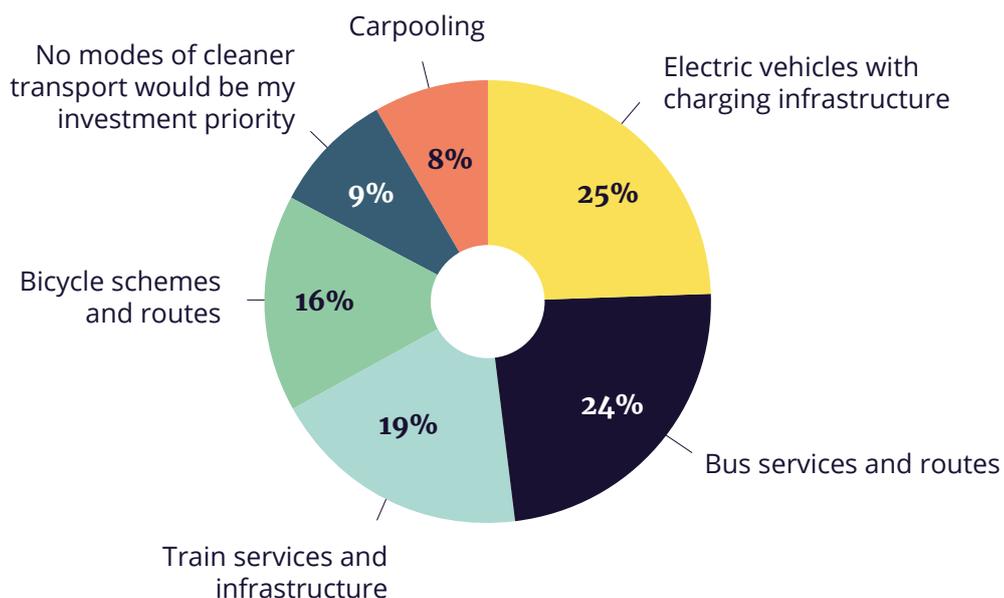
Xanthe Kueppers, Head of Investor Relations for the Sizewell C Project, EDF Energy

# What are the public's cleaner transport priorities?

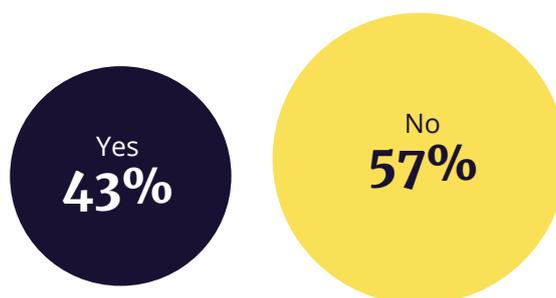
The public support a variety of clean transport modes which further confirms their understanding that transport is a critical element of net zero. What's interesting is that 72% would prefer individual or local transport modes with no real technological developments, such as cars, buses, car pooling and bicycles.

People's expectations of transport have not changed - the ones that are already popular remain so. But will that be enough or will people have to change their modes of transport or pay more for their personal and local choices?

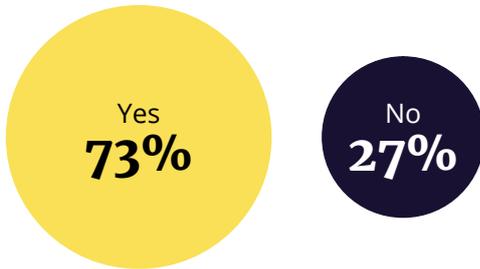
## What modes of cleaner transport would be your investment priority?



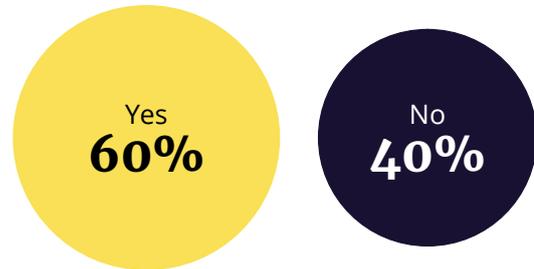
## Would you be willing to pay more in taxes to support investments in cleaner transport?



Would you be happy with an electric car charging point introduced on the street outside your house?



Would you be happy with a new train or tram line installed near your house?



Would you be willing to pay more in council tax for improved bus services or additional bus routes introduced near your house?



**“A successful and speedy transition to zero emission transport will depend on consumers embracing the change. This means we need good solutions that are also affordable and provide value to consumers. There are a variety of levers available to government to increase ambition and accelerate action, including incentives to encourage consumer uptake and continuing to actively support infrastructure roll-out.”**

Beth Jenkins, External Relations Manager, Shell

# What do leaders in infrastructure think about net zero?

In November 2019, Copper and BDB Pitmans hosted a roundtable event to discuss the key findings from our study and what they mean for our organisations and the infrastructure sector. Leaders from across the energy, transport, research, consultancy, construction and local government joined the event. There were three core themes that emerged during the discussion.

## Public's understanding

The public is not clear as to how 'net zero 2050' aligns with the various other environmental initiatives such as biodiversity, dealing with plastics, flooding and water scarcity. Across these issues there is a need for simple language that articulates the challenges and benefits of the movement towards net zero emissions.

## Small steps to net zero

Government policy has the potential to establish a roadmap which the public and industry alike can understand and support. However, the need for interim targets to make the 2050 target appear more tangible is paramount. These targets would equip infrastructure sectors with a mandate to enact change and bring the UK closer to net zero emissions.

## Shared responsibility

The scale of change will involve all sectors to transform how they operate, from land use changes and new infrastructure to cleaner energy and new technology. Though the energy and transport sectors have shaped the public's understanding of net zero, the understanding must now expand to incorporate other critical sectors such as construction, water and agriculture.

**“Industries need to look at net zero from a systemic view. The benefits of this will then trickle down to each individual project.”**

Denise Bower, Chief Executive, Major Projects Association

**“The public need a common understanding of net zero with a clear vision and simple messaging from government that unpicks it alongside other related topics such as greenhouse gases, climate change, flooding and coastal erosion.”**

Steve Fox, Chief Executive, BAM Nuttall

**“We can try to deliver progress towards net zero where people understand what is happening and feel it is being done for them, rather than done to them. Evidence shows that the former is easier than the latter.”**

Ben Heatley, Managing Partner, Copper Consultancy

# Conclusions and next steps

Our survey has confirmed that people are behind net zero emissions and why it's needed. The public support development of new infrastructure to make it possible, but they are not convinced that enough is being done to make the necessary changes in time to meet the target by 2050.

However, understandably when it comes to people making personal choices that affect their day-to-day lives, such as changing their usual local transport preference or increasing their taxes or user charges, they are not so accepting. So how do we help people understand the scale of change required along with the financial impact and how pervasive it will be? The industry can manage the transition by communicating more clearly and helping them feel a bigger part of the solution. This will involve:

**1**

Capitalising on their support for change while explaining the implications, benefits and actions needed to make net zero happen

**2**

Establishing small steps so that people can see progress and they can align themselves with the roadmap

**3**

Ensuring that people don't just see energy and transport as either all of the problem or all of the solution – all sectors must play a part

**4**

Explaining how net zero with clean growth will be paid for, while fairly balancing the public's contributions with government and private investment

The journey towards net zero is going to be a major change for society, impacting everything from where we live, to what we eat, to the jobs that we do. If we want that transition to be accepted rather than resisted, there is a lot of work to do.



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