

# Empowering climate action - in brief

Inspiring and supporting  
consumer participation in  
the energy transition

October 2021



## Inspiring and supporting society

People are changing the way they think about climate change and the environment. Perhaps a David Attenborough documentary caught their attention, they're worried by the increase in extreme weather, or their child took part in a climate protest. Whatever the reason, it is clear that the British public now recognises that climate change is real, and we need to do something about it.

As Great Britain's Electricity System Operator, we sit at the heart of the energy system and part of our role is about building a greener system for the future. We are driving change in the energy industry, transforming our approach to system operation to make sure that by 2025 we can run the system with zero carbon emissions some of the time, building to zero carbon operation all of the time by 2035.

A clear message from FES 2021 is that if we are to achieve net zero by 2050, we need to transform industry and society. Our Net Zero scenarios demonstrate the power of combining consumer and industry transformation to accelerate change.

But how can we, as an Electricity System Operator, and the wider industry, help the public to understand and engage with the net zero agenda and energy transition? To find out, we polled 4,211 members of the public and held 12 focus groups to better understand the public view on the UK's climate agenda and how they can get involved.

From our research it is clear that different types of consumers across the country face different challenges when it comes to being enabled and empowered to participate in, and benefit from, action on climate change. Here we set out our findings and suggest a roadmap for engaging each of those different groups.



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(ESO)

## Introduction

### What are the Future Energy Scenarios and why are they important?

With an ambitious target for net zero emissions by 2050, our energy system will need to transform rapidly while continuing to deliver reliability and value for consumers. We believe decarbonising energy is possible but understand that it will be complex, not least because there are many ways to reach net zero, each with their own trade-offs.

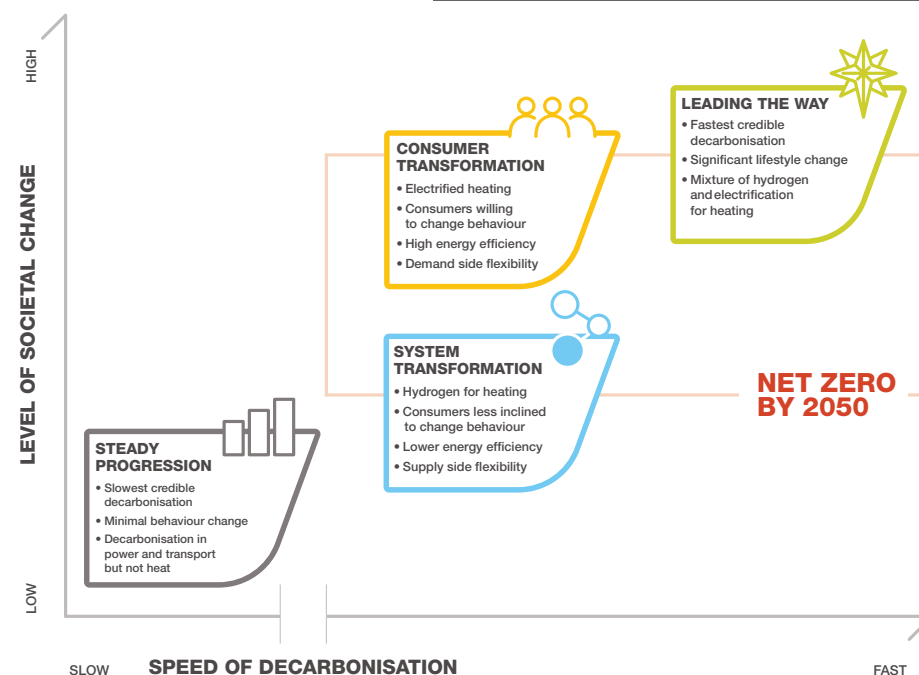
Our Future Energy Scenarios (FES) outline four different, credible pathways for the future of energy between now and 2050. Each one considers how much energy we might need and where it could come from. The overall scenarios remain consistent with those in FES 2020 but the details within them

are new for 2021 following extensive modelling, research and stakeholder engagement.

FES can be used to inform a range of energy system activities including network operation, investment decisions and energy policy.

### The Scenario Framework

These are our four scenarios: you can learn more about in the introduction section of the main FES 2021 document.



## Consumer and digitisation

Consumer Transformation and System Transformation represent two different ways to get to net zero - either by changing the way we use energy or by changing the way in which we generate and supply it. In Leading the Way, a combination of high consumer engagement and world-leading technology and investment help to enable our fastest credible decarbonisation journey. In this scenario, the UK reaches net zero in 2047 and goes on to reduce emissions by 103% by 2050 (compared to 1990 levels) - in other words, it is net negative.

Decarbonisation happens slowest in Steady Progression, where 2050 emissions are reduced by 73% of 1990 levels.

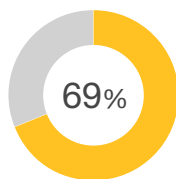
Consumer behaviour is pivotal to decarbonisation – how we all react to market and policy changes, and embrace smart technology, will be vital to meeting net zero. Every scenario sees some level of societal change compared to today, even Steady Progression, but the scale and type of change assumed varies significantly across them.

### What this means

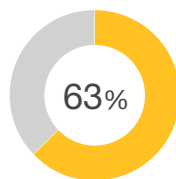
- Historically, changes to deliver decarbonisation have been on the supply side and largely invisible to consumers. However, to reach net zero there will need to be direct changes to consumer behaviour. What got us here, won't get us there!
- The journey to net zero by 2050 will involve multiple generations of consumers. Improved understanding of how we as consumers can help is required, as polling currently suggests a significant gap.

### Polling the public on doing their bit for the environment and climate

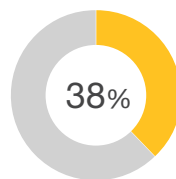
*"I already do my bit to help the environment"*



*"I want to know more about how I can play a part in tackling climate change"*



*"The Government expects me to change too much for the environment"*



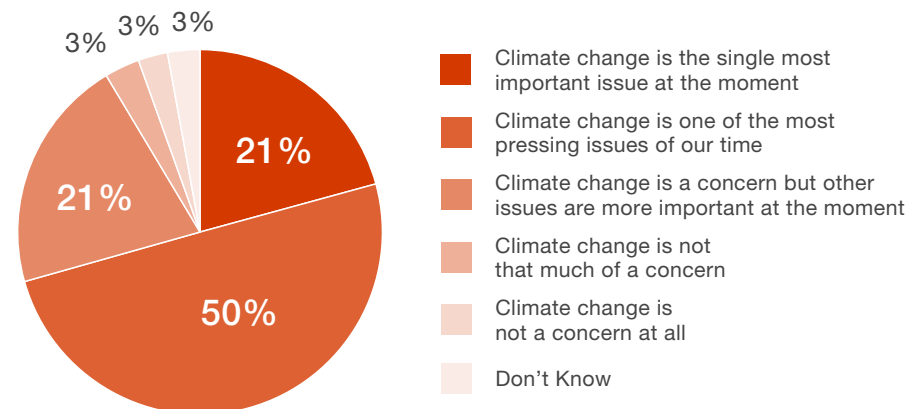
4,211 adults in Great Britain, polled online 10-20 August 2021

## Key Message 1

### Rising concern about climate change

The British public is concerned about climate change: 71% say it is either one of the most pressing issues of our time or the single most important issue.

Chart 1: How serious do you consider the issue of climate change to be?



Public concern about climate change has risen rapidly and it now ranks alongside recovering from Covid, the quality of the NHS and the state of the economy as the most important issues facing the country. Only 9% of Britons say that climate change is not an issue of concern.

### Which of the effects of climate change are you most worried about, if any? [Top three]

- Harmful effects on wildlife and nature (41%)
- Harm to the planet that my children and grandchildren will live on (36%)
- Dramatic changes in temperature (32%)

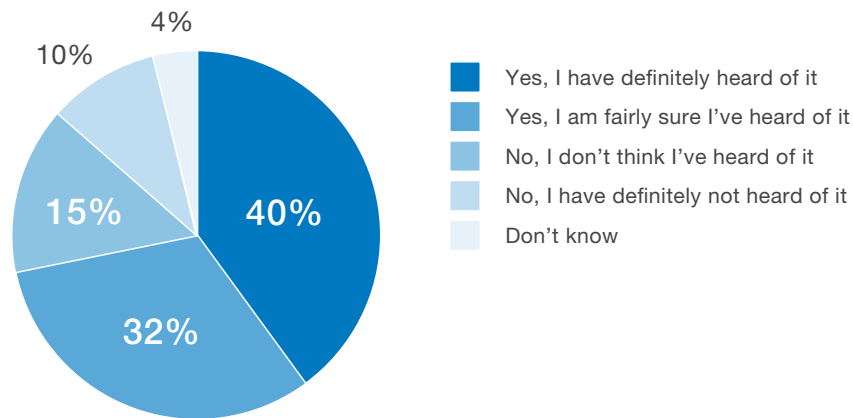


## Key Message 2

### Low awareness and understanding of net zero

Despite rising levels of education about climate change and the impact of carbon emissions, the Government's legal commitment to reaching net zero is poorly understood.

**Chart 2:** In 2019, the UK Government made it a law that the UK must achieve Net Zero by 2050. Prior to taking this survey, had you heard of this plan?



In focus groups, the British public show a fairly widespread understanding of climate change and some of the challenges it creates. We had discussions about food supplies, changes in the seasons, disruption to wildlife, and increasingly alarming extreme weather. But there are two substantial limitations on this awareness:

1. In some parts of the population, environmental awareness is tethered firmly to ideas about waste, pollution and other physical signifiers. This makes it hard to move conversations beyond recycling and car fumes and on to increases in energy efficiency and the reduction of energy use.
2. While Britons know about climate change, they are far less aware of net zero and the government's legal commitments. Only 40% are certain they've heard of the plan to reach net zero by 2050. Communications that focus on net zero, rather than climate change, will be hobbled by this lack of understanding.

Focus groups conducted 14-16 September 2021

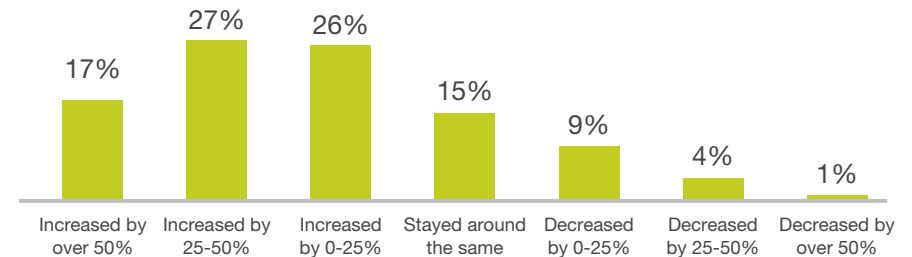
## Key Message 3

### UK progress not clear to the public

The public hasn't heard about the progress the UK has made so far towards net zero. That lack of clarity fuels cynicism about the commitment of government and business, and low motivation in the face of a seemingly unsurmountable task.

The UK's progress to reduce emissions has been impressive – cutting emissions in half in the past 30 years - but 71% of the British public think that emissions have actually *increased*. In the focus groups we found that informing the public of the UK's progress made them believe that it was more worthwhile taking action in their own lives, meant maybe businesses and government had been 'pulling their weight' more than expected, and inspired them to want to do more.

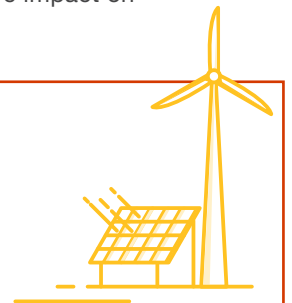
**Chart 3:** If you had to guess, how much would you expect the greenhouse gas emissions (such as carbon dioxide) produced in the UK to have changed in the last thirty years?



Citizens want and need to see the impact that actions such as switching to EVs, heat pumps or solar panels are having - whether in their everyday lives through cleaner air or lower running costs of everyday activities, or the collective impact on emissions reductions.

#### Whose advice would you trust on how to make changes to your life to become 'greener'? [Top three]

1. David Attenborough (Trusted by 81%)
  2. Friends and family (76%)
  3. Documentaries on TV or streaming channels (73%)
- Other options included National and Local government, TV news and charities



## Key Message 4

### Differentiation is important

To enable and inspire the public to take action in support of the UK's climate change targets, we need to better understand their barriers and motivators. Only by considering the ways in which the public differs can we empower each group to act, including through the adoption of green home technologies and services.

Our research identifies six archetypes or 'segments' that exist in the British population – each requiring a slightly different approach. In brief they are:



#### Climate Worriers – 18% of GB

Climate Worriers are the oldest of the segments and they worry about a lot of things – including climate change. Although likely to be affluent, cost and disruption are still barriers to action. They feel that their actions can make a difference but are overwhelmed by the scale of the challenge. They want to be convinced that it is not all too late already and told in specific detail what they should do to help mitigate the impact of climate change.



#### Price Sensitive – 19% of GB

This group are highly informed and engaged with the climate change agenda and keen to make practical change, but they are also highly sensitive to cost. They are focused more on waste and consuming less than on climate directly. They think that the UK should do what it can to tackle climate change, even if other countries did not.



#### Actively Engaged – 19% of GB

The Actively Engaged are highly engaged and aware of current affairs issues generally. They understand and speak confidently about climate change on a global and holistic level rather than focusing only on waste and pollution. They are more than happy to tell others what they ought to be doing. They care deeply about climate change and have consistently the highest scores in caring for the planet and concern about climate change. They score highest when it comes to having already taken actions like turning down their heating and using their cars less. They are among the most educated of the segments and the most likely to say that they feel their personal actions will have an impact in reducing climate change.



#### Busy Convenience-Seekers – 15% of GB

This group is less engaged in current affairs in general and that includes climate change. This does not mean that they don't care – there are issues such as the loss of distinct seasons that worry them more than other groups – but they don't have the time, money or inclination to do much about it. They are the most urban, the most likely to have children still living at home and are the youngest of our segments.



#### Pragmatic Sceptics – 8% of GB

This group is most negative about climate change but make up the smallest segment of the population. They generally do not prioritise climate change as a concern – only 2% selected it as an important issue facing the country in our poll. However, in focus groups they show far more awareness and concern than this result might suggest. Their attitude is that there is little point in doing anything when businesses and governments are not. Their educational attainment levels are the lowest, and they are among the older of the segments. They trust no one other than maybe their friends and family.



#### Disengaged Cynics – 20% of GB

Disengaged Cynics are generally less informed than the other groups. This group can be expected to disperse into the other segments as net zero and climate change debates become more mainstream and they become more engaged. They have the lowest levels of home ownership and are the most likely to fall into the DE socio-economic group. They have more than the average number of children living at home and are among the least likely to be retired.

## Key Message 5

### Sequencing is important

How and when we engage the public on climate change and the energy transition matters. To help practitioners visualise a way of engaging with the segments we have produced an 'Engagement Roadmap'. In the roadmap we place each segment along a prioritisation spectrum showing the order in which each might participate. There is also an intervention spectrum that shows whether each group requires a predominantly communication- or market-based solution to encourage participation.

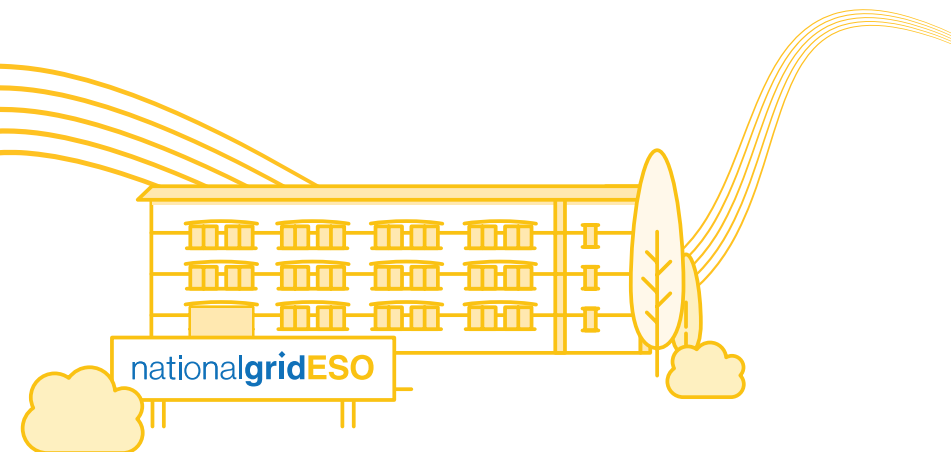
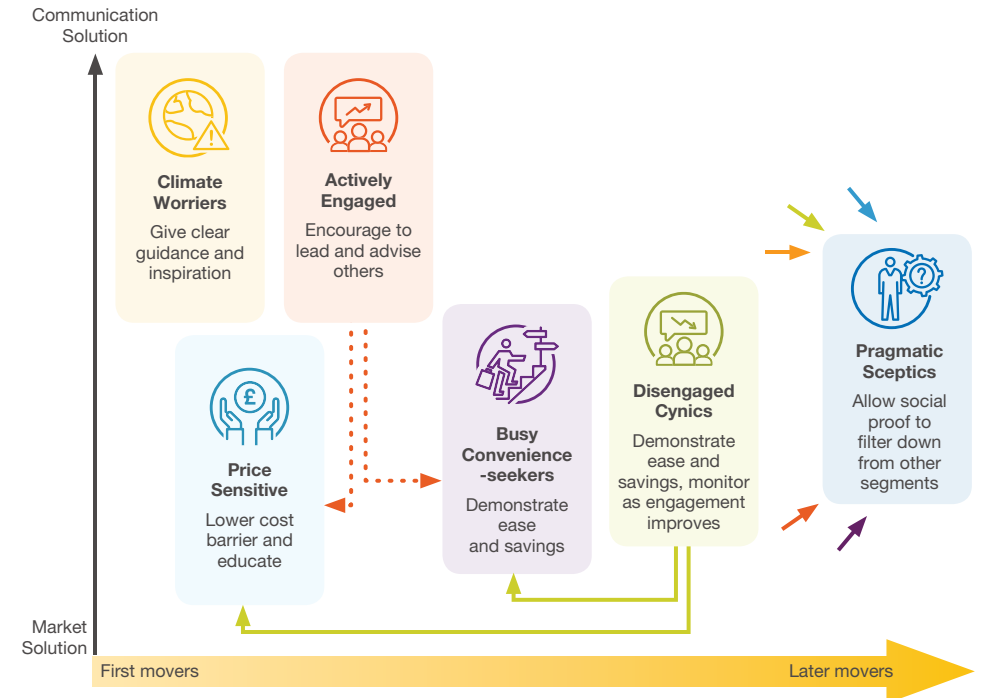
In essence, three segments (the **Climate Worriers**, **Price Sensitive** and **Actively Engaged**) can become priority audiences. This represents 56% of the population, and communicating with them requires three distinct strategies:

1. Giving clear guidance and inspiration,
2. Lowering costs, and
3. Encouraging leadership.

This leaves three segments at a lower priority for now, but still given some support through actions taken for other segments. **Busy Convenience-Seekers** will be persuaded by many of the same levers that will convince the **Price Sensitive**. **Disengaged Cynics** will gradually move into other segments as climate-related conversations become more widespread and **Pragmatic Sceptics** should begin to respond as social proof from other segments filter down to them in the form of new social norms and mandated changes.

It is clear that there is no 'silver bullet' to supporting the public in the energy transition, but by better understanding the different barriers, opportunities and perspectives of the British public, consumers across the country can be supported in the energy transition.

### Engagement Roadmap



# Continuing the conversation

For further information on ESO publications please visit: [nationalgrideso.com](https://nationalgrideso.com)



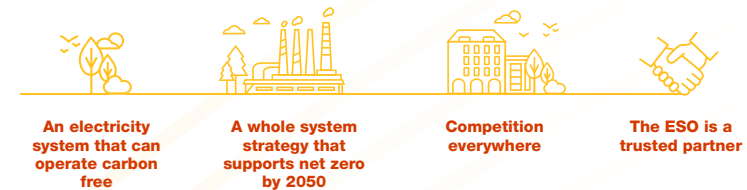
## About the Electricity System Operator (ESO)

Electricity is a modern-day necessity and the ESO exists to make sure everyone gets access to a safe, reliable and affordable supply. We make sure people, communities and businesses across Great Britain have the electricity they need at the flick of a switch because without it, society and the economy wouldn't function. We bring energy to life.

But providing reliable and affordable electricity is not enough. The energy we all consume needs to get cleaner, quickly. We are passionate about making a difference and delivering that change. We are here to help Great Britain and other countries reduce their carbon emissions so that our planet is safe for future generations to enjoy.

Our mission is to enable the transformation to a sustainable energy system and ensure the delivery of reliable, affordable energy for all consumers.

By 2025, we aim to have:



This means we need to fundamentally change how our system is designed to operate. We are working with the industry to integrate newer technologies across the system and increase demand-side participation.

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