



RenewableUK Cymru

Energy Polling



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Overview



01. Support for Renewables



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04. Pylons & Cables



05. Message Testing



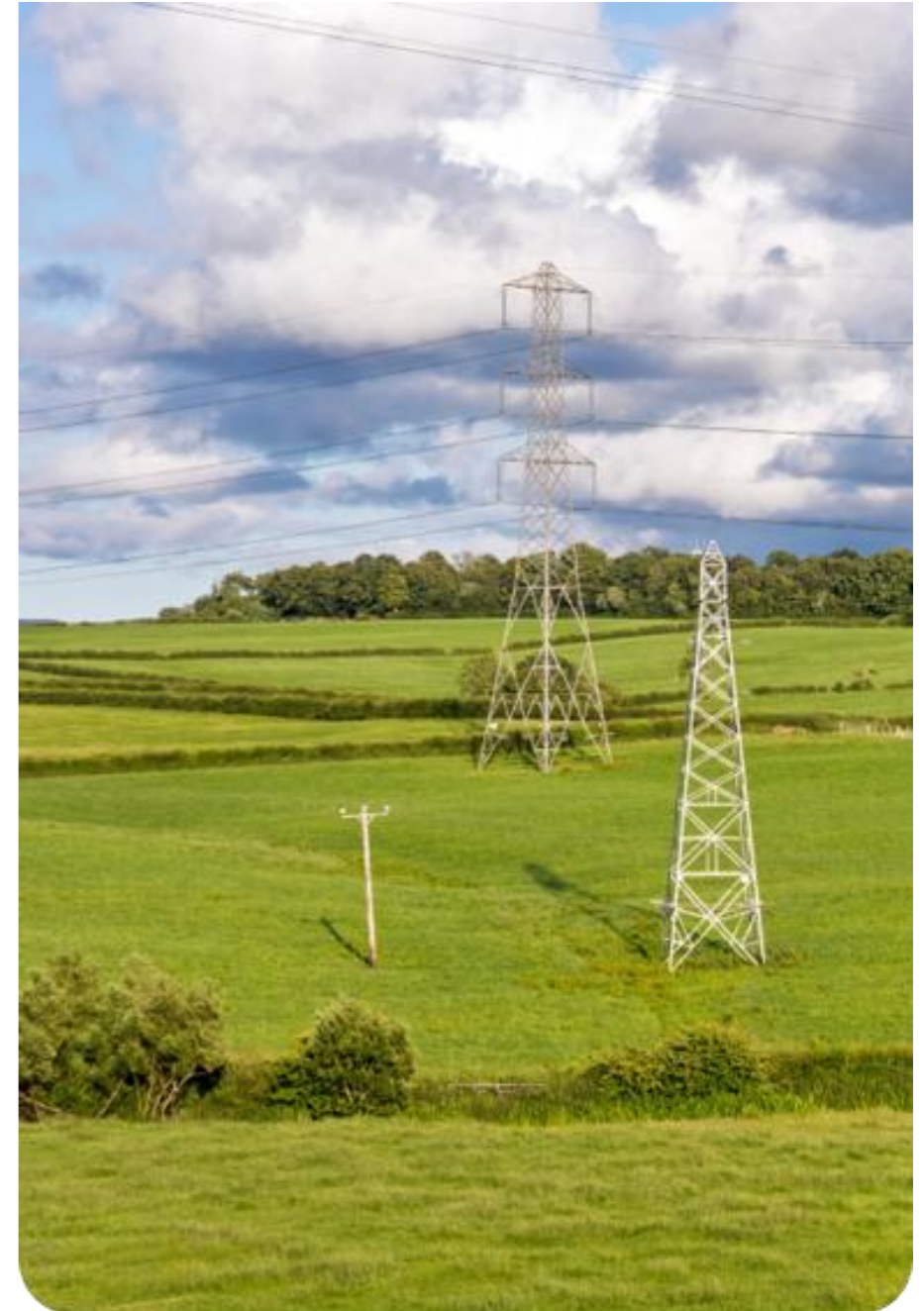
Methodology

This poll was carried using an online approach on 19th to 24th March 2026.

BMG surveyed a nationally representative sample of 1,001 respondents in Wales, aged 16 and above

Weighting was applied based on:

- Age group x gender
- Index of Multiple Deprivation (IMD)
- Wales region (North Wales, South Wales)
- Urban-rural
- Past vote in 2024 UK election.



Exec summary (1)

Welsh public back renewable energy by a large margin - and this holds across voters of every party

All renewable energy sources command majority support; fossil less popular

The public wrongly think Wales is above UK renewables average – showing potential for a powerful 'falling behind' message

Wales's natural suitability, lower bills and cleaner air lead benefits, while cost and landscape impact are the main concerns

- 71% say renewable development should increase. Just 6% want it to decrease.
- 58% want Wales's energy future to be mainly or exclusively renewable, with only 9% wanting a predominantly non-renewable approach.
- Even among those intending to back Reform in May's Senedd election, 59% support increased development – lower than the average, but still a comfortable majority.
- Every renewable source tested - from hydropower (82%) to onshore wind (65%) - commands majority support for more investment. Meanwhile, support for investment in each of the non-renewable sources falls well below half.
- North Sea oil and gas is the most popular non-renewable source (47%), far ahead of imported oil and gas (22%). This suggests the typical Welsh voter strongly supports both expanding renewables, but is also comfortable, even if a bit less enthusiastic, in increasing North Sea drilling, rather than seeing it as an either/or choice.
- 44% think the percentage of electricity generated from renewables in Wales is higher than the UK average, while only 18% correctly identify that it is lower. In reality, Wales (33%) lags noticeably behind the UK (50%).
- Results elsewhere in the polling suggest a widely held view that Wales has the natural resources to be a renewable leader, creating a gap with current reality and 'untapped potential'.
- The three most-cited benefits are natural suitability for wind, solar and tidal (30%), reducing air pollution (29%), and protecting against future bill spikes (27%)
- The biggest concerns are landscape and wildlife impact (both 28%) and cost, whether upfront expense (26%) or higher bills (22%). This is notable given that lower bills is also a top benefit, suggesting uncertainty among voters about whether renewables will make energy cheaper or more expensive.

Executive summary (2)

Awareness of community benefit schemes is very low - and most people underestimate what wind farms return to communities

Underground cables are popular in principle, but cost information dramatically shifts opinion towards overhead pylons

All nine tested messages are persuasive. But messages on jobs, bills and Wales's natural advantages resonate most - more so than climate framing

- Awareness of community benefit schemes is very low: 76% have either never heard of them (44%) or have heard of them but aren't sure what they mean (32%), with only 17% having any meaningful understanding of how they work
 - People also significantly underestimate what the average wind farms return: 82% underestimate how much communities receive relative to post-tax profit. 58% think it is 10p or less per £1, a fraction of the true figure.
 - When told the real figure (37p per £1), 65% say they would be more likely to support a local renewable energy project.
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- The survey used a split-sample experiment where half of respondents were shown the cost difference between undergrounding and overhead pylons before being asked their preference. *Without* cost information 53% prefer underground cables; once participants are told they cost approximately five times more than overhead pylons, support falls to 29% and preference for pylons rises sharply to 43%.
 - 57% then said they are unwilling to pay more on their bills to fund undergrounding, rising to 66% among Reform voters. So, while undergrounding appeals to voters in the abstract, the argument for undergrounding, if informational round costs is made available voters may take a different view.
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- Every message tested produces a strongly positive NET score, ranging from +65 to +51, meaning there is no message that many say is unpersuasive. The question then becomes which of a strong set of arguments are most persuasive.
 - The strongest messages frame renewables as a practical opportunity for Wales: making the most of the country's natural wind and sea resources (+65), bringing bills down over the long term (+64), and creating skilled jobs in post-industrial communities (+63).
 - The weakest message was Wales contributing its fair share to the global challenge of protecting the climate, scoring +51. So, while climate framing is not toxic; it is the least effective argument available and the one most likely to put off already sceptical audiences.
 - Some messages have disproportionate appeal specific sets of voters: local growth and Welsh business opportunities has particular appeal for those intending to back Reform in May (+55); while the community benefit reinvestment message is particular popular with voters saying they intend to vote Plaid (+73).

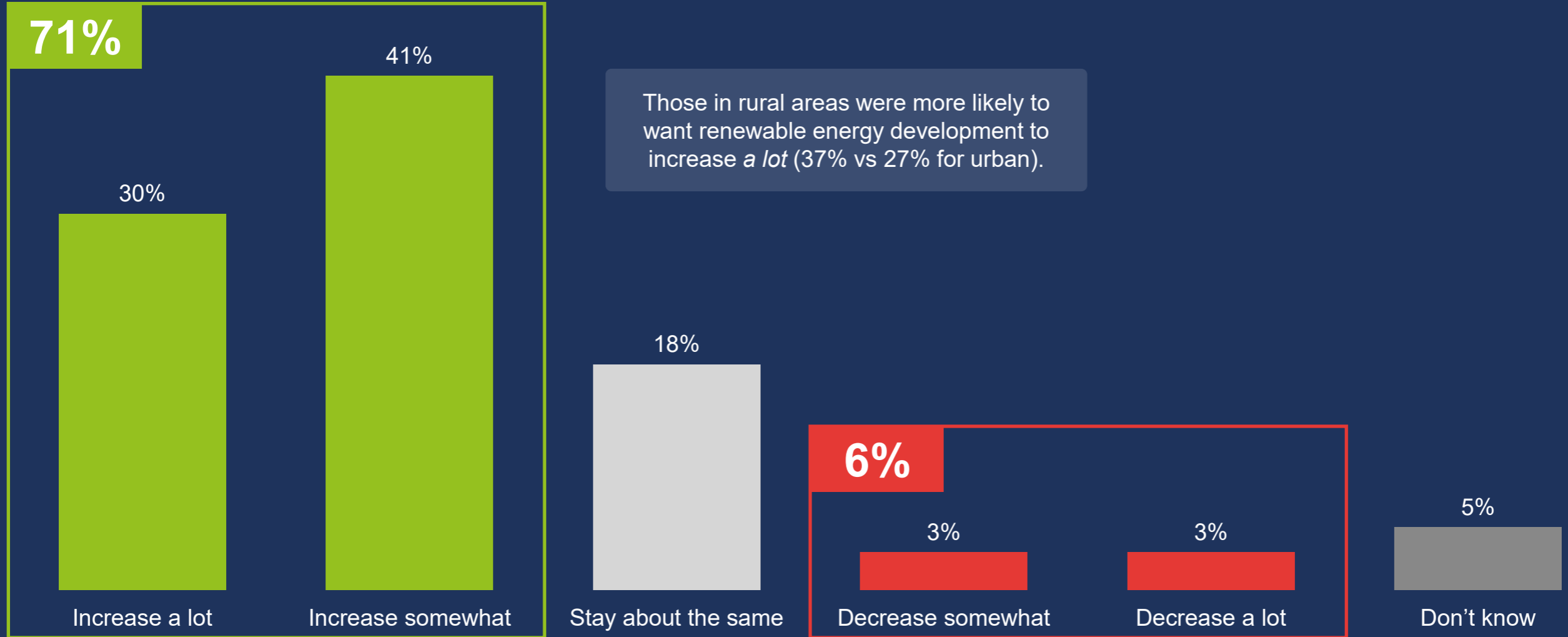


Support for Renewables



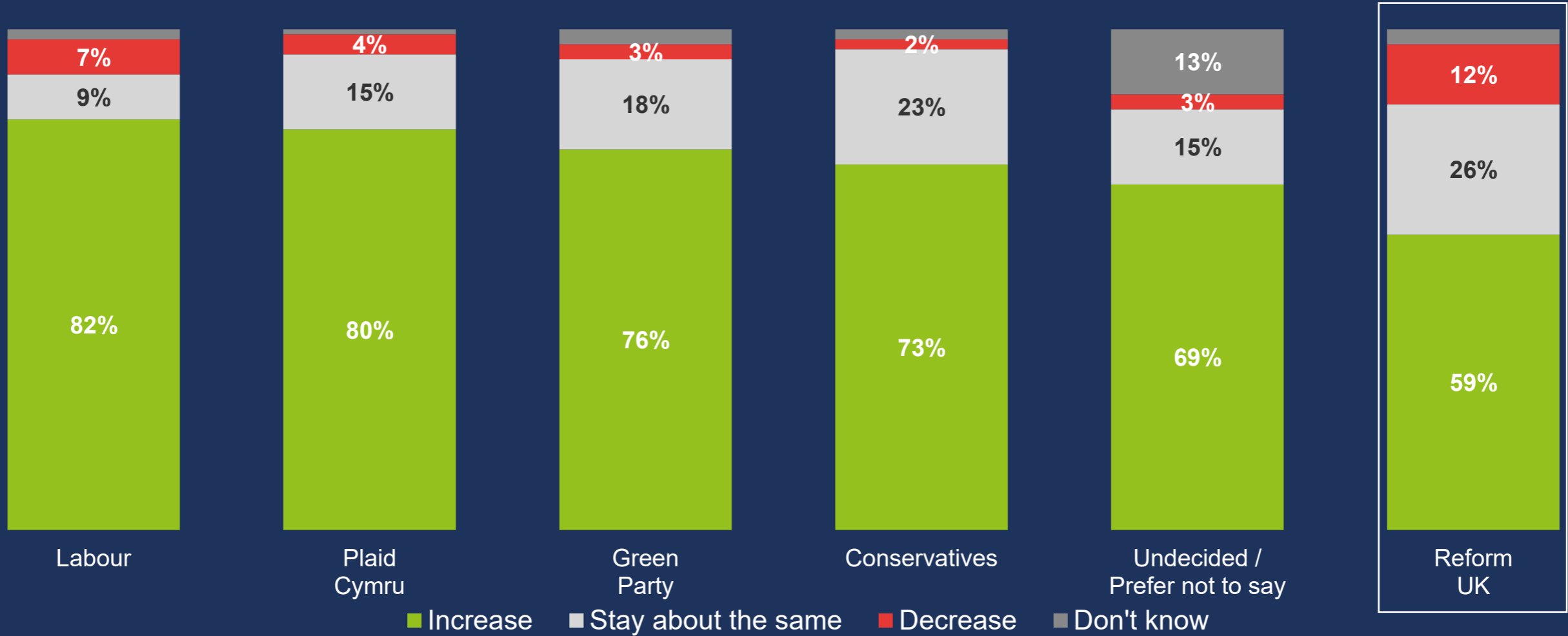
People in Wales back increased renewable energy development by a large margin

What should happen to renewable development in Wales



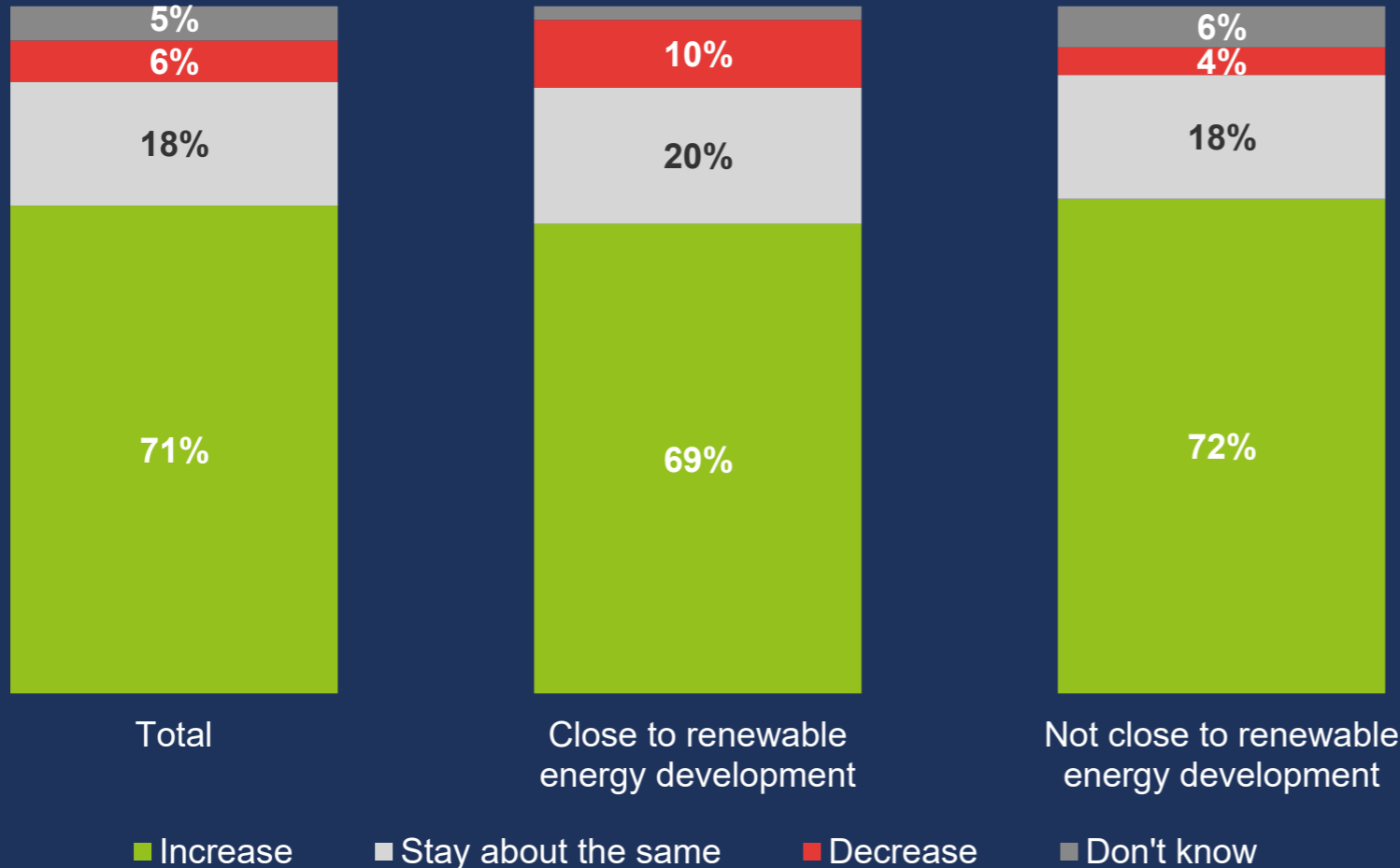
Support for renewable development spans the political spectrum - even among prospective Reform voters, a comfortable majority favour increased development

What should happen to renewable development in Wales by voting intent in 2026 Senedd Election



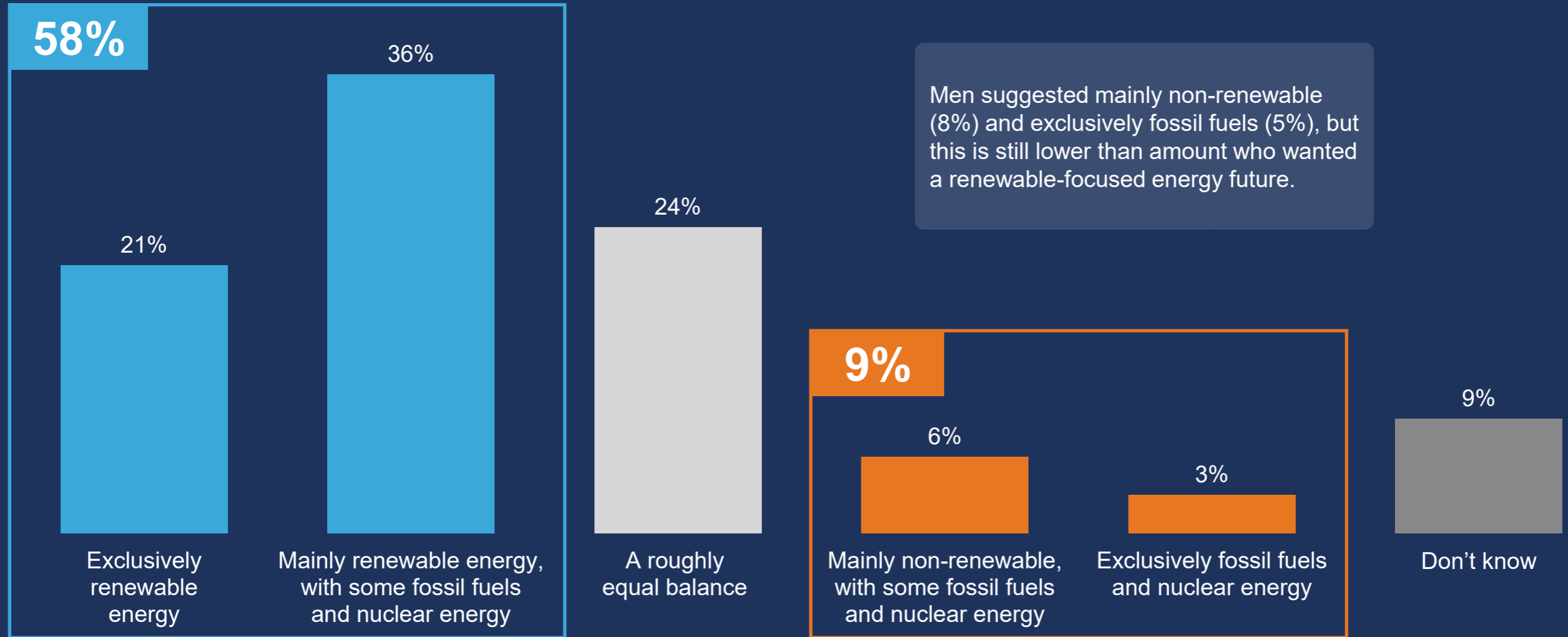
Even for those close to renewable energy projects, desire to increase development holds firm – though opposition is a little higher

What should happen to renewable development in Wales by proximity to renewables projects



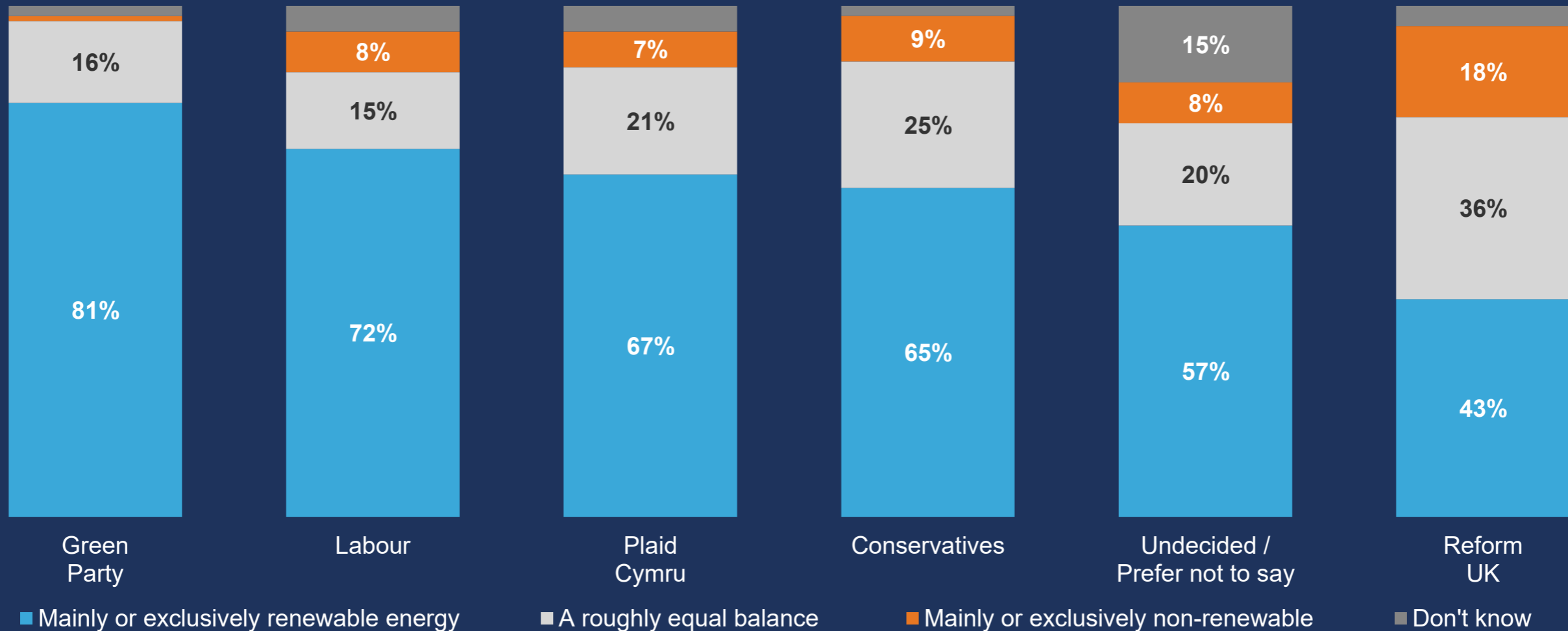
Most want a mixed, renewables-focused energy system for the future – very few want a predominantly non-renewable approach

Views on energy future for Wales in the next 20 years



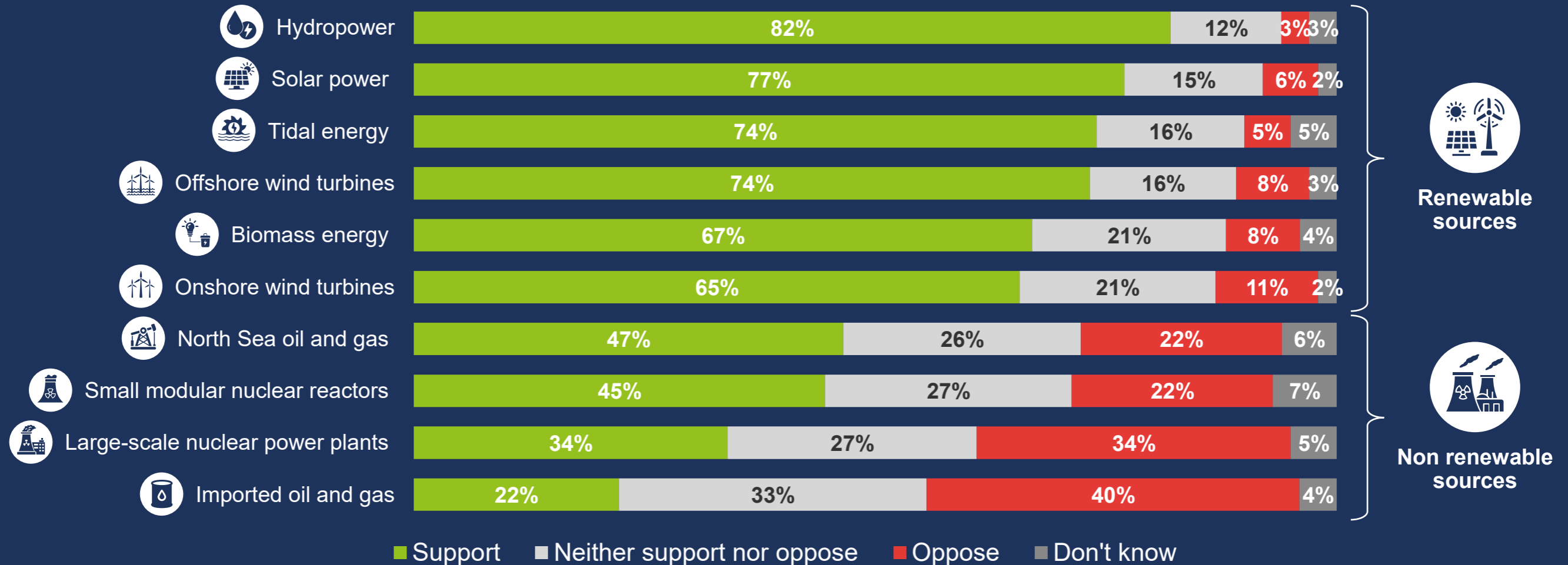
Though most want a mainly or exclusively renewable energy future for Wales, this differs by party support

Views on energy future for Wales in the next 20 years, by party support













All renewable sources command majority support, while support falls below half for non-renewables – especially imported oil and gas

Support for investment in different energy sources in Wales



Support for investment in renewables sources is strong irrespective of party support. Reform supporters are notably more likely to back North Sea oil and gas.

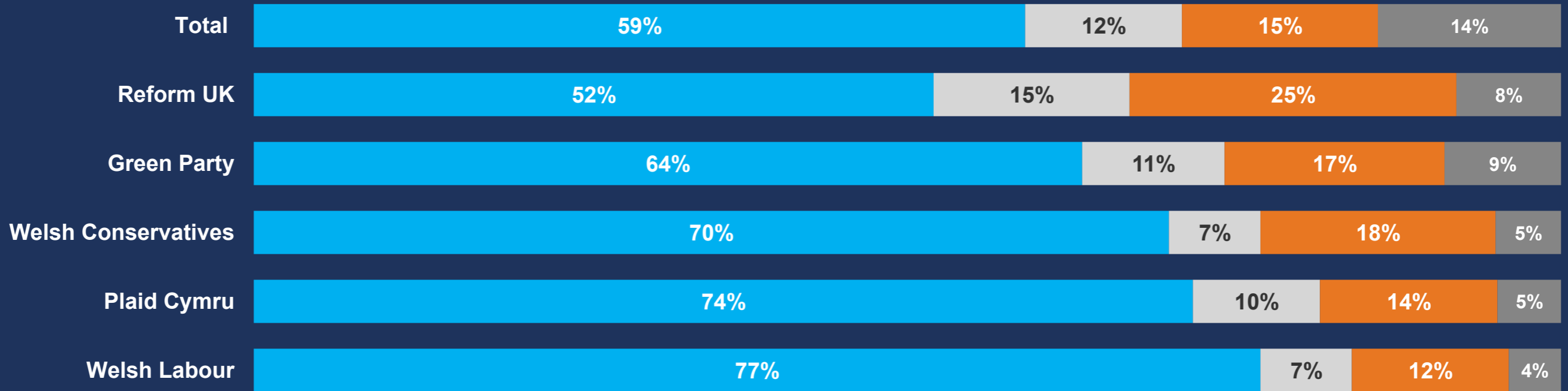
Support for investment in renewable energy sources by voting intent in 2026 Senedd Election (% support)

Energy type	Total	Plaid Cymru	Labour	Green Party	Reform UK	Conservatives
 Hydropower	82%	81%	92%	89%	92%	97%
 Solar power	77%	83%	85%	84%	76%	81%
 Offshore wind turbines	74%	79%	81%	82%	74%	81%
 Tidal energy	74%	84%	90%	88%	79%	91%
 Biomass energy	67%	68%	83%	72%	73%	86%
 Onshore wind turbines	65%	73%	82%	72%	56%	78%
 North Sea oil and gas	47%	37%	44%	31%	74%	77%
 Small modular nuclear reactors	45%	51%	47%	44%	61%	61%
 Large-scale nuclear power plants	34%	37%	36%	22%	52%	68%
 Imported oil and gas	22%	21%	28%	35%	35%	16%

Imports are unpopular no matter your political persuasion.

A clear majority in Wales support approving new onshore wind and solar projects. While lower, this includes a majority of Reform voters

Whether Wales should stop approving or continue approving onshore wind and solar projects, by 2026 Senedd voting intention



- Wales should continue approving new onshore wind and solar (alongside other sources), because stopping new projects would be more likely to push bills up and weaken energy security.
- Neither
- Wales should stop approving new onshore wind farms and solar farms, because doing so would be more likely to make energy more affordable and secure.
- Don't know

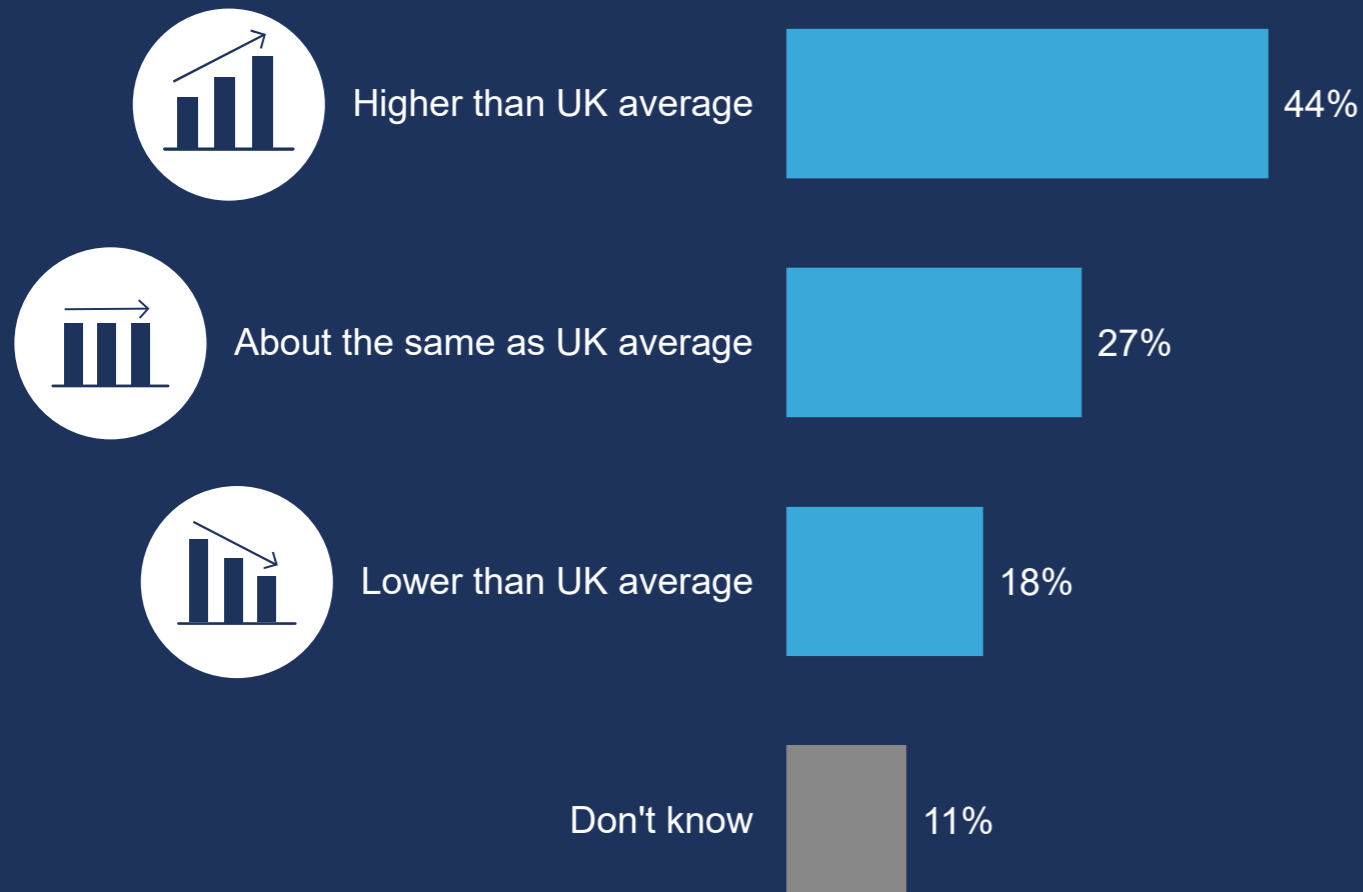


Benefits & Concerns



The Welsh public wrongly believe the percentage of electricity generated from renewables is higher in Wales than the UK average

Perceptions of renewable electricity generation in Wales vs. UK average



Reaction in focus groups

When the reality that Wales generates 33% of its electricity from renewable energy compared to 50% in the United Kingdom in focus groups, it both surprised and disappointed participants.

This gap creates a clear opportunity for 'loss aversion' messaging focused on the risk of Wales falling behind.



I think it must be higher [than the UK] [...] I can't think of any other way [than wind turbines] we generate power in Wales.
(REFORM CONSIDERER)

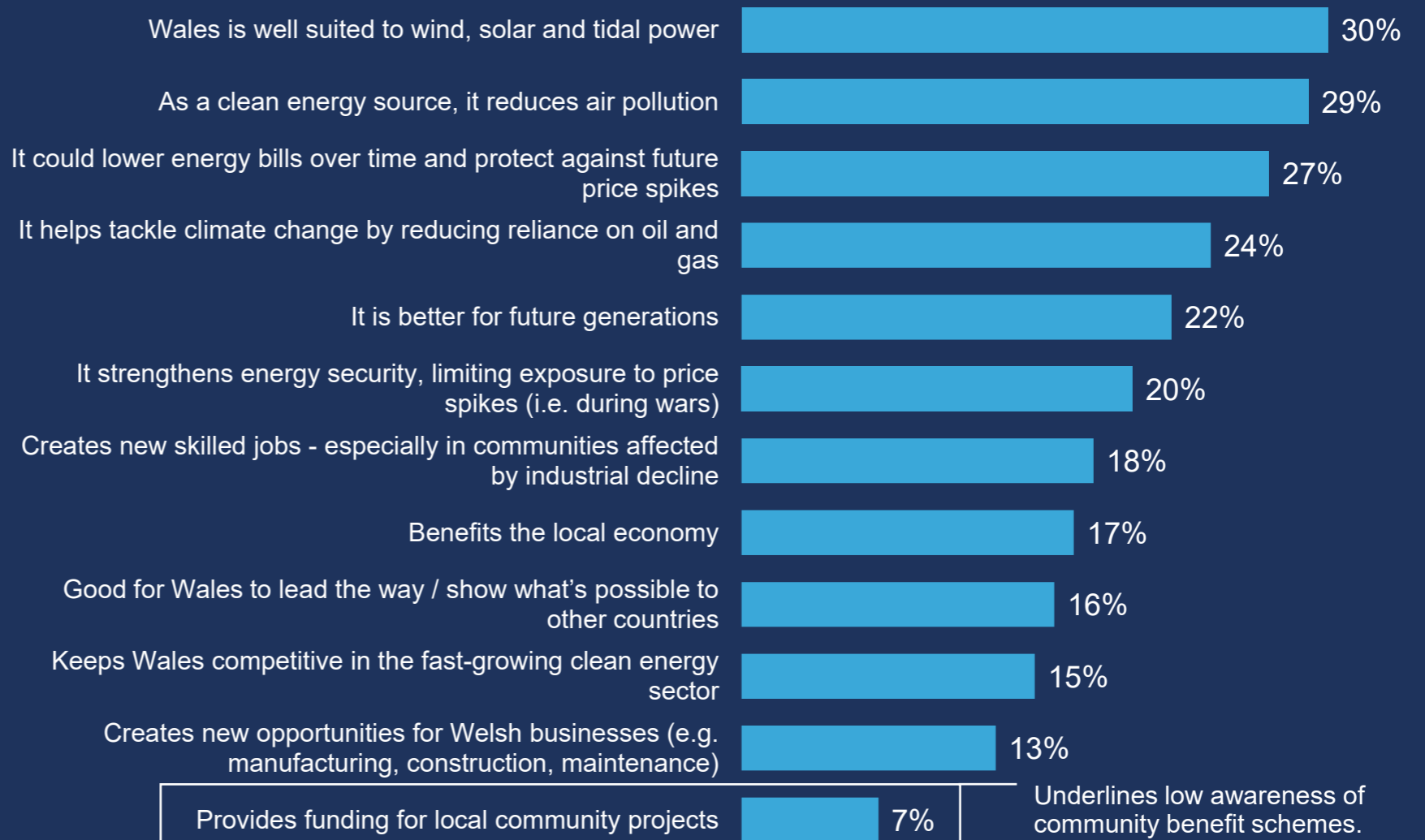


It's a surprise [...] because as I say, I don't know of any other methods of energy production in Wales. I can't think of the name of a power station in Wales. You know what you call a standard coal fired, gas fired, nuclear power station. I can't think of one.
(REFORM CONSIDERER)

While multiple potential benefits appeal, the top factors are Wales's natural suitability for renewables, cutting bills, and reducing pollution



Potential benefits of renewable energy ranked high to low by appeal



Underlines low awareness of community benefit schemes.

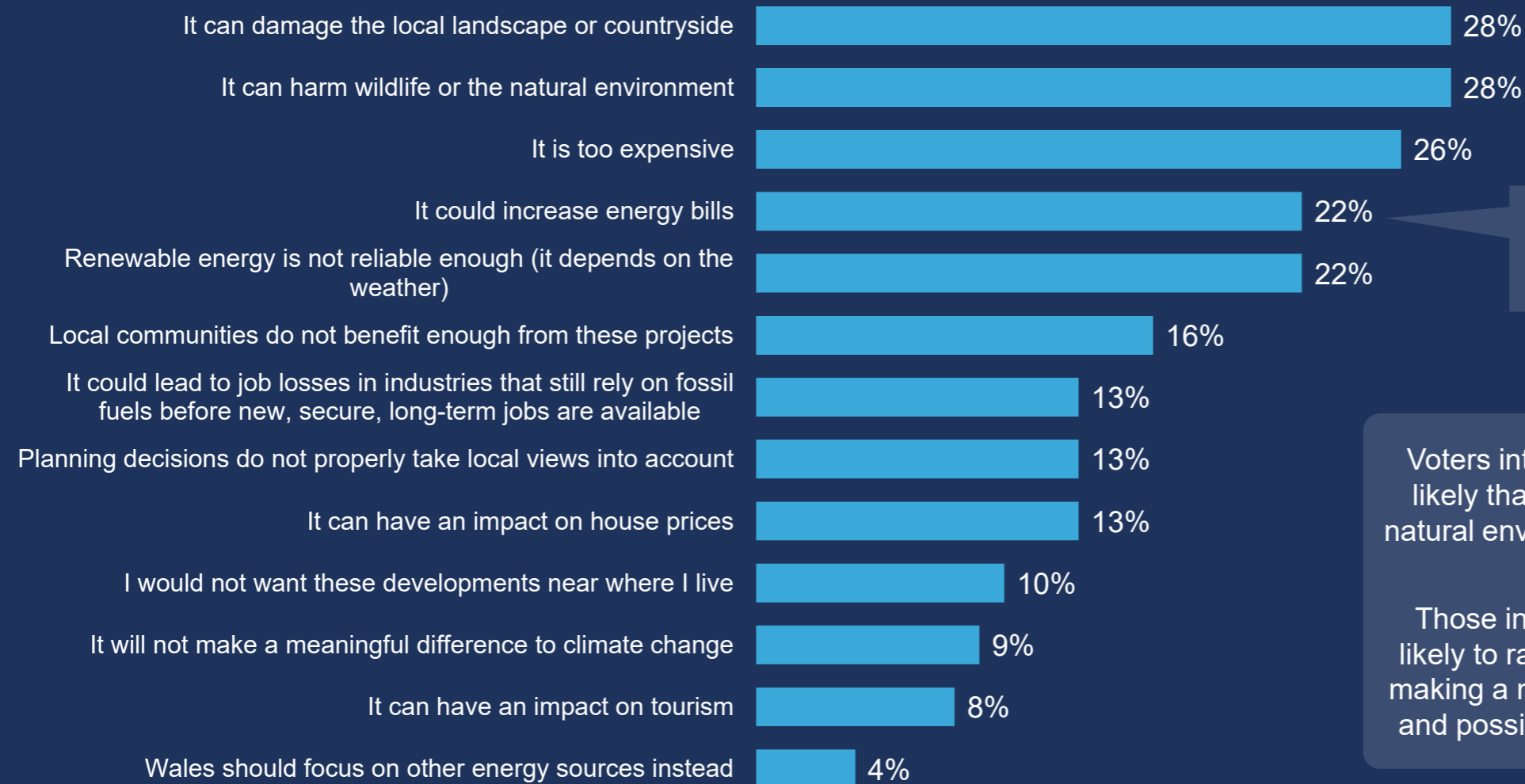
Voters of different parties place more and less emphasis on certain benefits

Potential benefits of renewable energy in Wales by voting intent in 2026 Senedd Election

Potential benefits	Total	Plaid Cymru	Labour	Green Party	Conservatives	Reform UK
Wales is well suited to wind, solar and tidal power	30%	29%	25%	22%	28%	41%
As a clean energy source, it reduces air pollution	29%	32%	26%	29%	28%	24%
It could lower energy bills over time and protect against future price spikes	27%	22%	25%	20%	22%	31%
It helps tackle climate change by reducing reliance on oil and gas	24%	31%	25%	38%	26%	13%
It is better for future generations	22%	30%	29%	22%	25%	19%
It strengthens energy security, limiting exposure to price spikes (i.e. during wars)	20%	19%	16%	27%	22%	15%
Creates new skilled jobs — especially in communities affected by industrial decline	18%	15%	18%	27%	21%	18%
Benefits the local economy	17%	16%	23%	16%	22%	16%
Good for Wales to lead the way / show what's possible to other countries	16%	23%	21%	15%	21%	18%
Keeps Wales competitive in the fast-growing clean energy sector	15%	14%	17%	30%	18%	11%
Creates new opportunities for Welsh businesses (e.g. manufacturing, construction, maintenance)	13%	10%	18%	15%	11%	13%
Provides funding for local community projects	7%	7%	10%	7%	3%	7%

The biggest concerns around renewables are the impact on the landscape and natural environment, alongside expense, bill impact and reliability

Potential drawbacks / concerns of renewable energy ranked high to low



Concern about rising bills is also quite high as a concern and a benefit - this remains a contested issue.

Voters intending to vote Plaid Cymru are more likely than average to cite concerns about the natural environment (42%) or potential damage to landscape (31%).

Those intending to vote Reform UK are more likely to raise cost (38%), reliability (32%), it not making a meaningful difference to climate (17%), and possible damage of local landscape (29%).

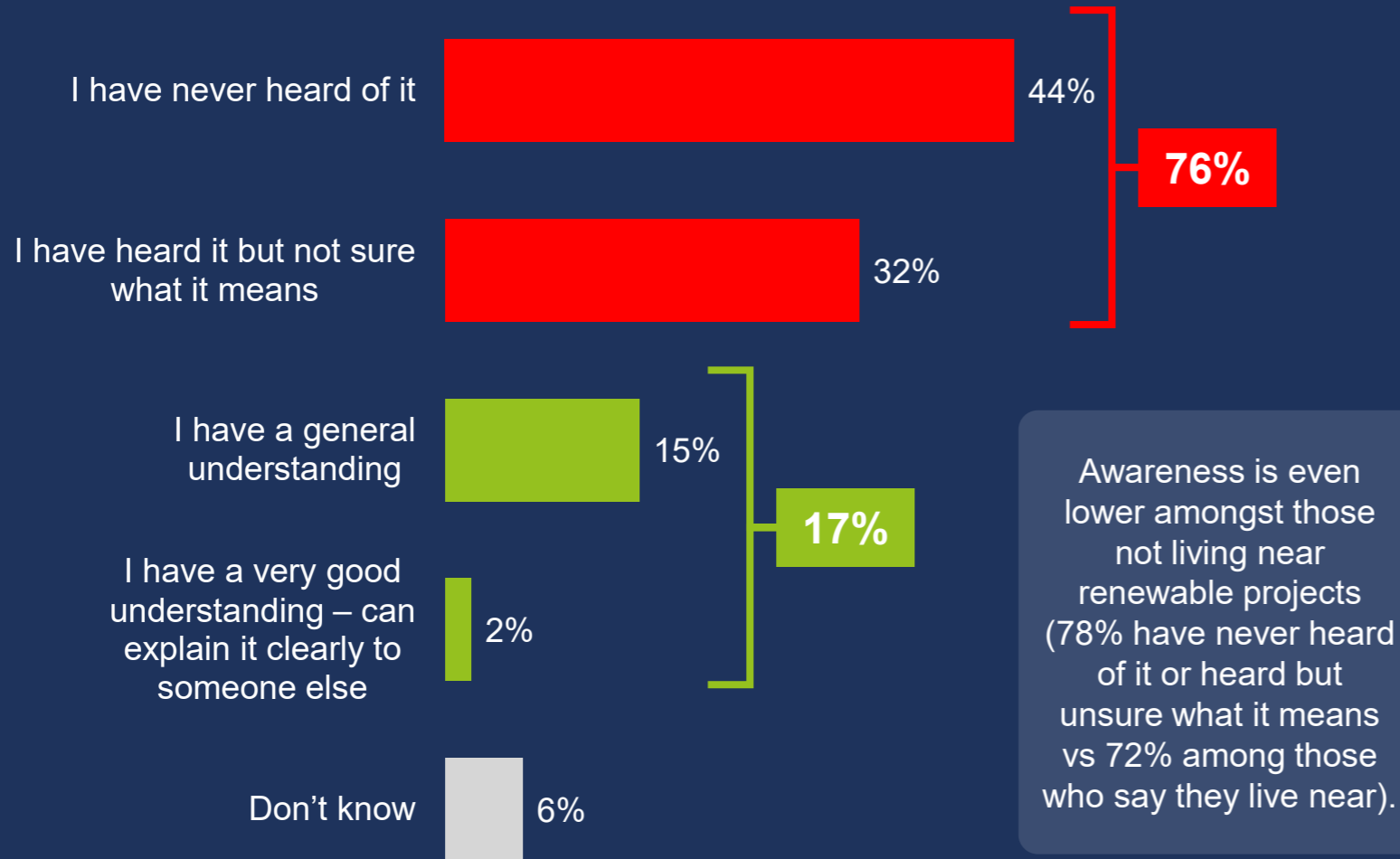


Community Benefit



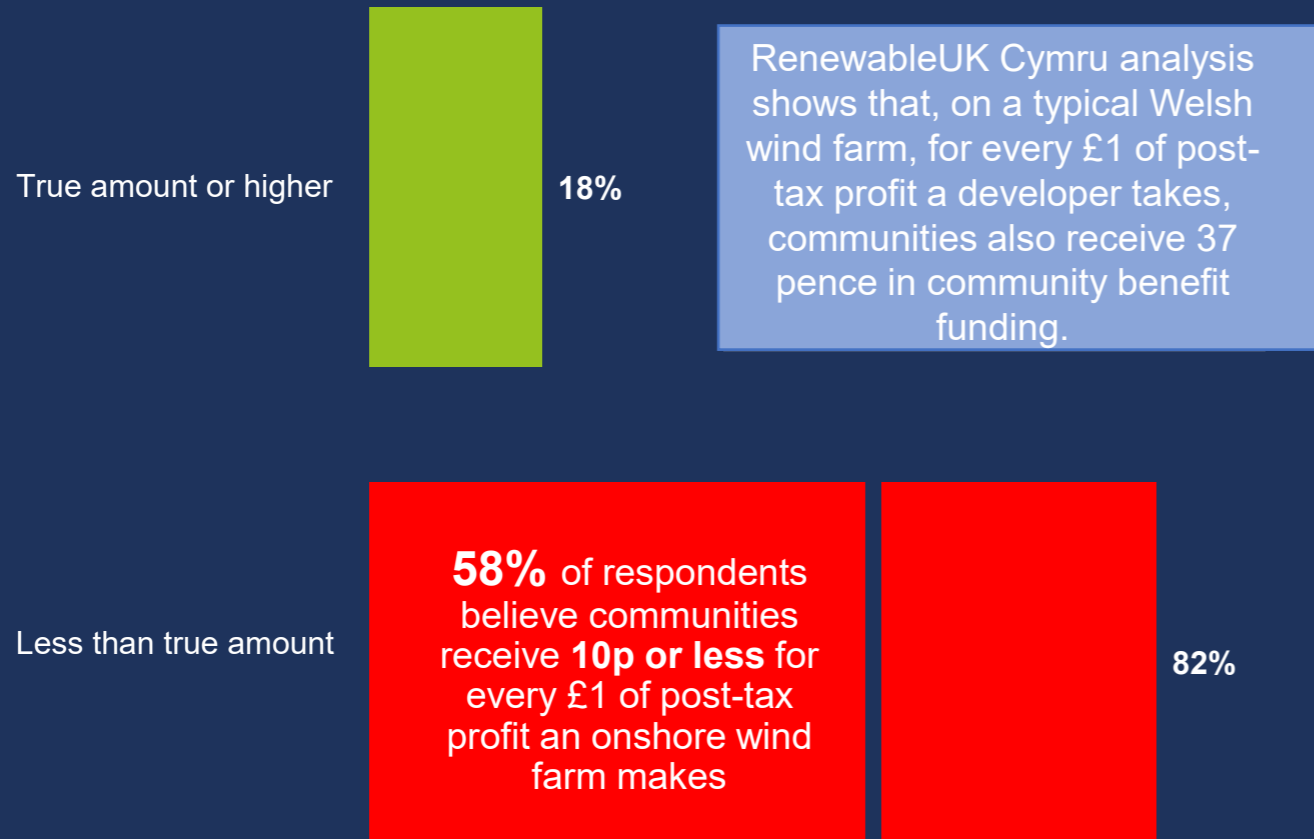
Awareness of community benefit schemes linked to renewable projects is very low

Awareness of community benefit schemes linked to renewable projects



Most significantly underestimate how much of a wind farm's post-tax profits are returned to local communities

Perceived share of onshore wind farm profits going to local communities



65% stated that knowing true amount would makes them **more likely to support** a renewable energy project in their area.

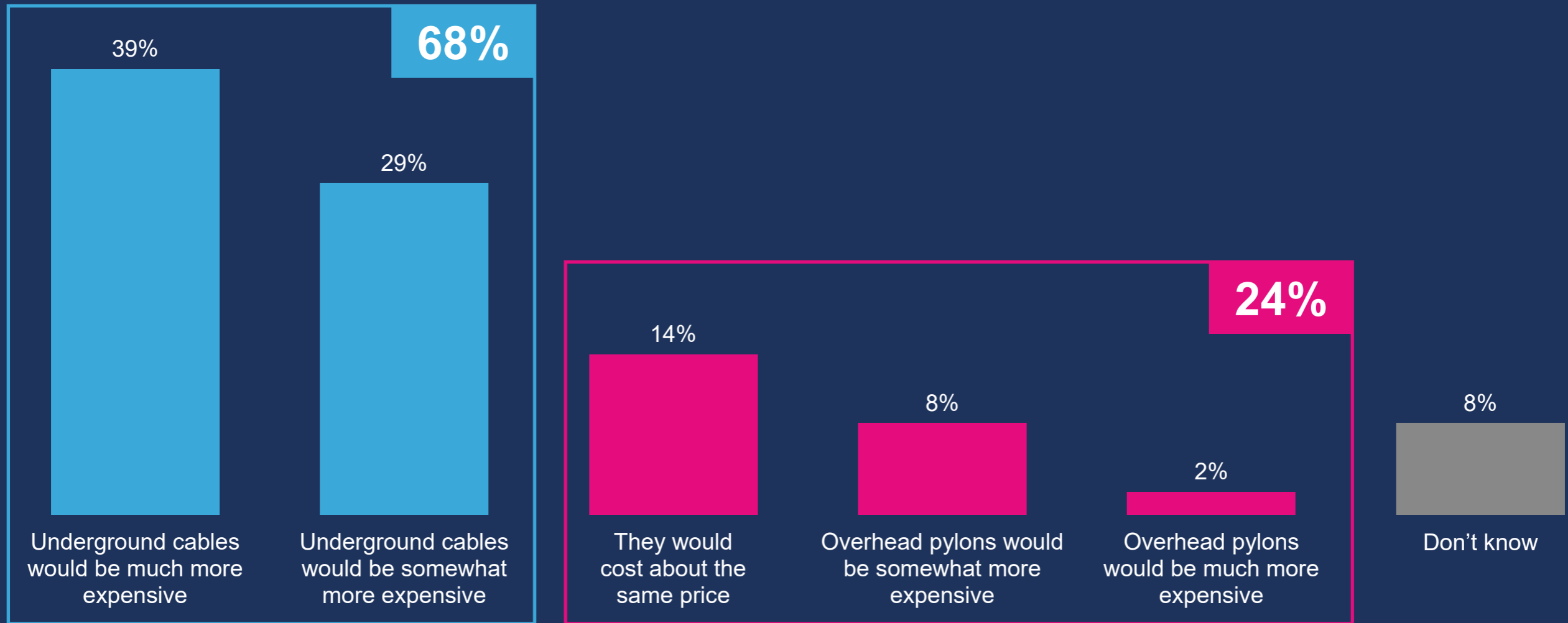


Pylons & Cables



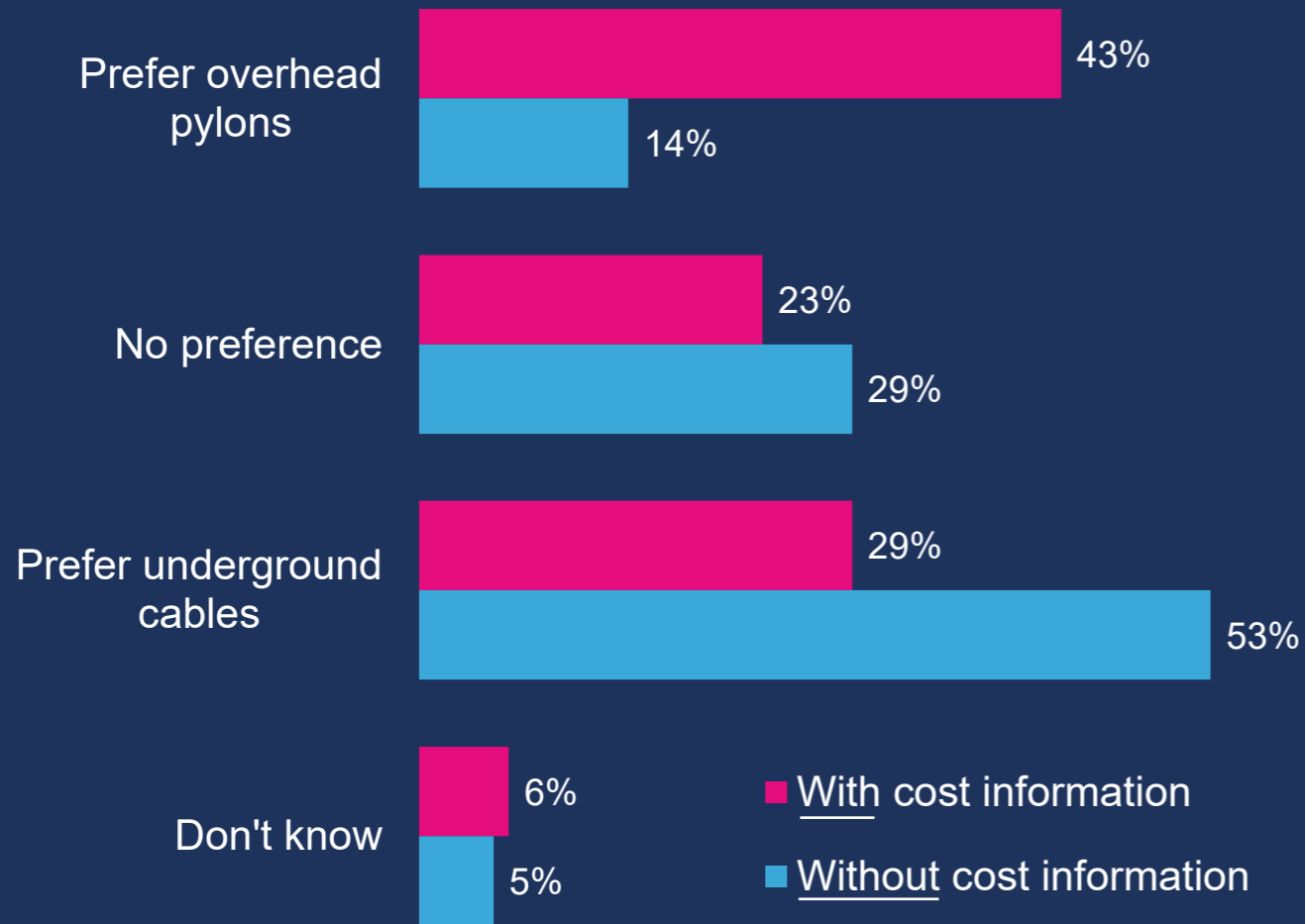
Most recognise underground cables are more expensive – but a notable minority think they cost the same or less.

Perceived cost of overhead pylons vs underground cables



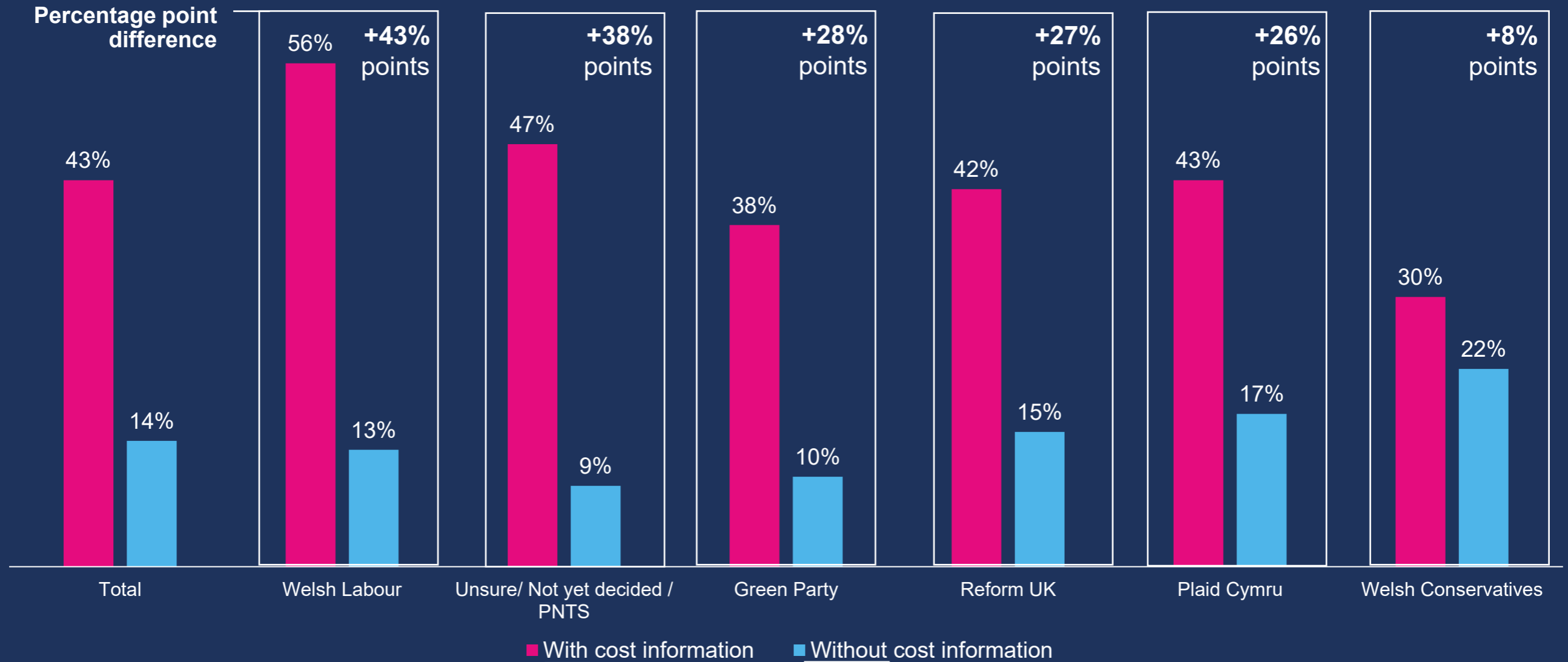
Cost information substantially shifts preferences towards overhead pylons

Preference for cabling or pylons by whether shown cost information



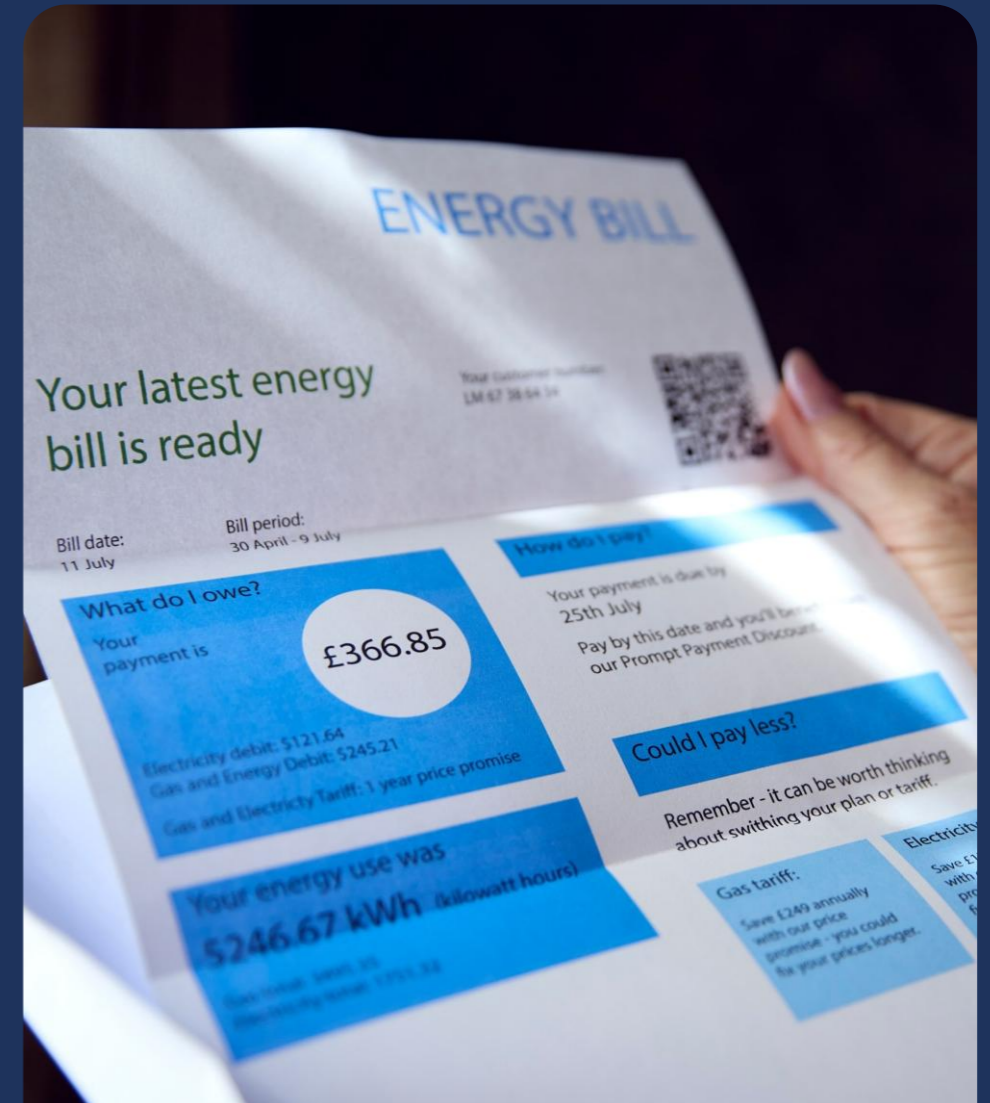
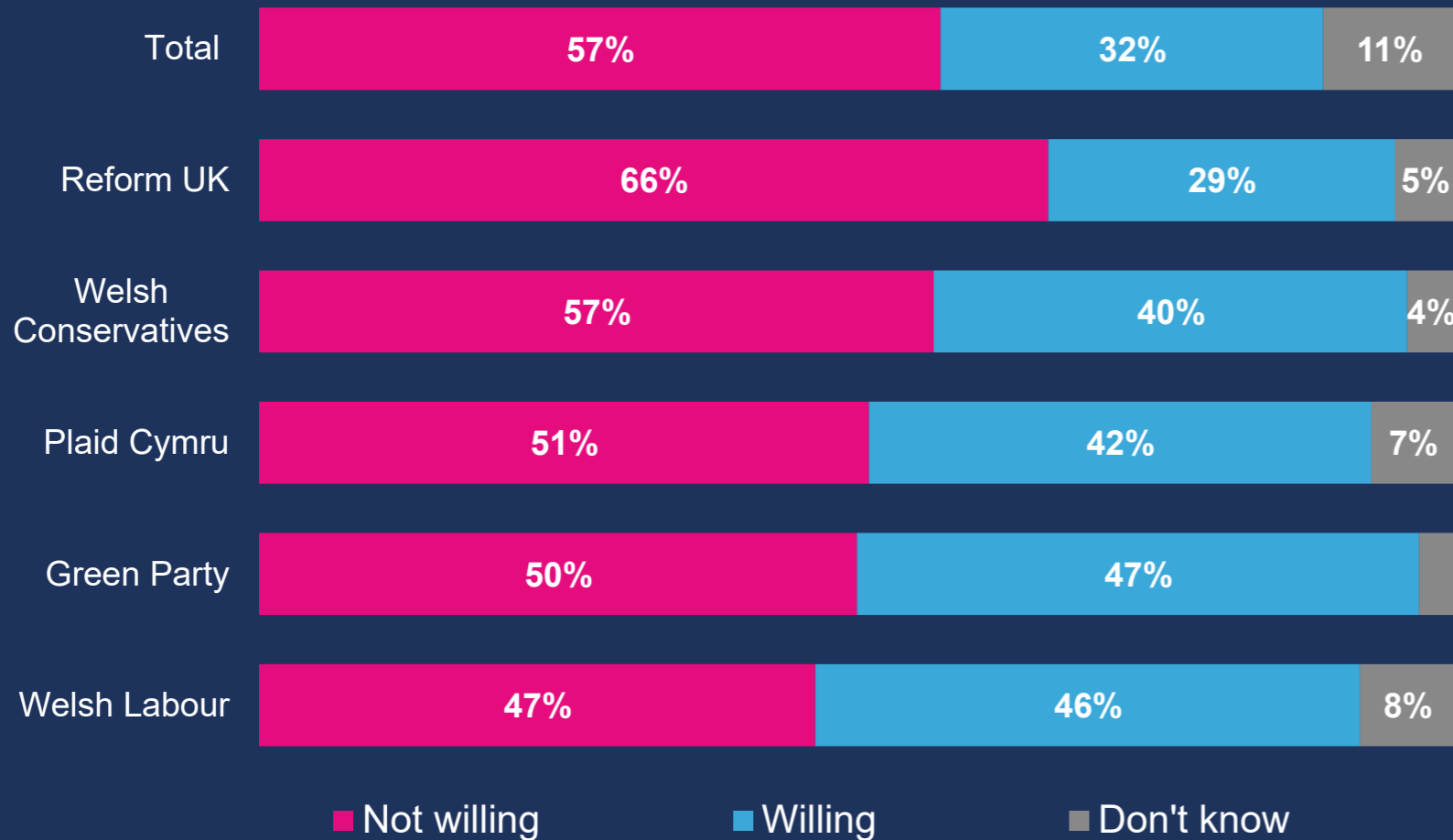
Survey experiment: Half of participants were shown information highlighting that underground cables can cost around five times more than overhead pylons (£639m vs £120m). The other half were not shown this information. Both groups were then asked for their preference.

Cost information causes an uplift in support for overhead pylons, but this does differ by party support.



Most voters are unwilling to pay more to fund undergrounding - though views vary by party support

Willingness to pay a little more on energy bills for undergrounding cables - by Senedd Election voting intent



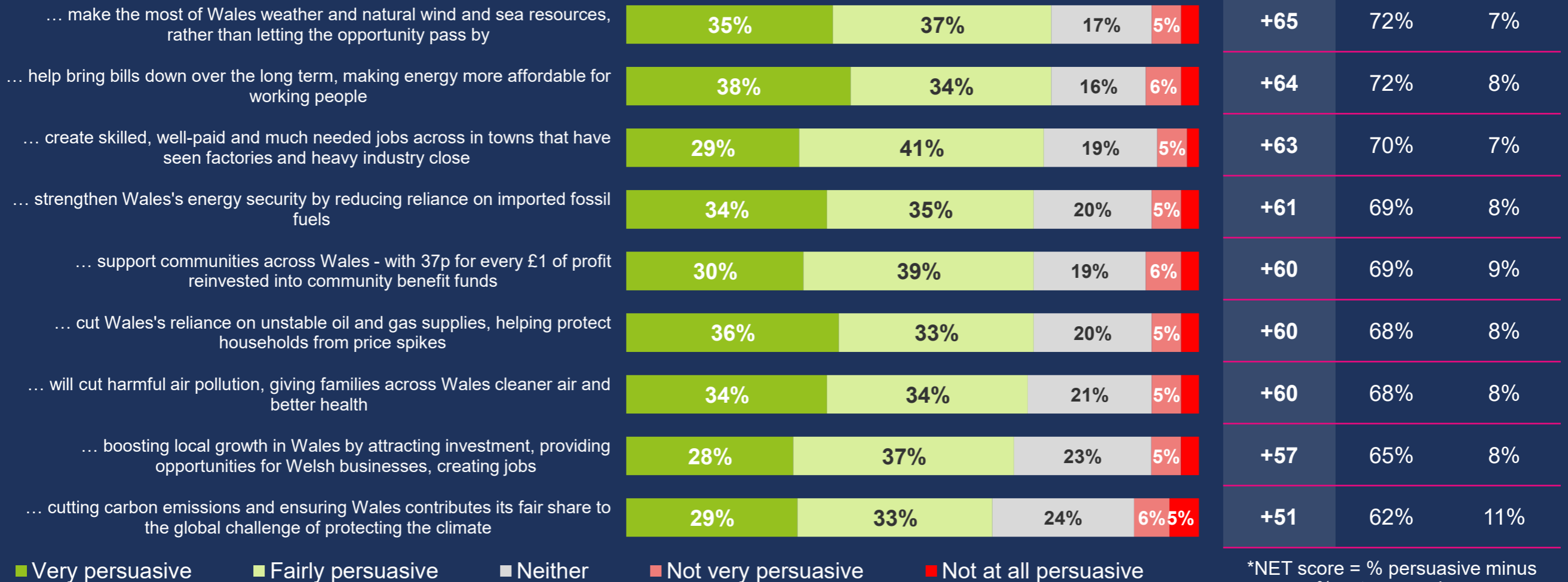


Message Testing



“Fair share” climate messaging performs poorly; messages on Welsh weather suitability, jobs creation and energy security are most persuasive

Messages rated by how persuasive they are (sorted by NET score)



*NET score = % persuasive minus % not persuasive.

Some messages are more popular with particular sets of voters

Messages rated by how persuasive they are by voting intent in 2026 Senedd Election

Message	Total	Plaid Cymru	Labour	Conservatives	Green Party	Reform UK
... make the most of Wales weather and natural wind and sea resources, rather than letting the opportunity pass by	65	64	82	80	77	54
... help bring bills down over the long term, making energy more affordable for working people	64	72	76	73	72	52
... create skilled, well-paid and much needed jobs in towns that have seen factories and heavy industry close	63	70	79	72	71	54
... strengthen Wales's energy security by reducing reliance on imported fossil fuels	61	68	74	80	77	49
... cut Wales's reliance on unstable oil and gas supplies, helping protect households from price spikes	60	70	81	71	71	41
... will cut harmful air pollution, giving families across Wales cleaner air and better health	60	70	78	76	48	49
... support communities across Wales - with 37p for every £1 of profit reinvested into community benefit funds	60	73	71	71	74	51
... boosting local growth in Wales by attracting investment, providing opportunities for Welsh businesses, creating jobs	57	68	73	63	55	55
... cutting carbon emissions and ensuring Wales contributes its fair share to the global challenge of protecting the climate	51	64	77	69	63	32

Message testing sheets: Reform and Plaid

Reform UK voters (May vote intention)			
Message	Reform UK NET	All Wales NET avg	vs. average
... boosting local growth in Wales by attracting investment, providing opportunities for Welsh businesses, creating jobs	+55	+57	-2
... make the most of Wales weather and natural wind and sea resources, rather than letting the opportunity pass by	+54	+65	-11
... create skilled, well-paid and much needed jobs in towns that have seen factories and heavy industry close	+54	+63	-9
... help bring bills down over the long term, making energy more affordable for working people	+52	+64	-12
... support communities across Wales – with 37p for every £1 of profit reinvested into community benefit funds	+51	+60	-9
... strengthen Wales's energy security by reducing reliance on imported fossil fuels	+49	+61	-12
... will cut harmful air pollution, giving families across Wales cleaner air and better health	+49	+60	-11
... cut Wales's reliance on unstable oil and gas supplies, helping protect households from price spikes	+41	+60	-19
... cutting carbon emissions and ensuring Wales contributes its fair share to the global challenge of protecting the climate	+32	+51	-19

Plaid Cymru voters (May vote intention)			
Message	Plaid Cymru NET	All Wales NET avg	vs. average
... support communities across Wales - with 37p for every £1 of profit reinvested into community benefit funds	+73	+60	+13
... help bring bills down over the long term, making energy more affordable for working people	+72	+64	+8
... create skilled, well-paid and much needed jobs in towns that have seen factories and heavy industry close	+70	+63	+7
... cut Wales's reliance on unstable oil and gas supplies, helping protect households from price spikes	+70	+60	+10
... will cut harmful air pollution, giving families across Wales cleaner air and better health	+70	+60	+10
... strengthen Wales's energy security by reducing reliance on imported fossil fuels	+68	+61	+7
... boosting local growth in Wales by attracting investment, providing opportunities for Welsh businesses, creating jobs	+68	+57	+11
... make the most of Wales weather and natural wind and sea resources, rather than letting the opportunity pass by	+64	+65	-1
... cutting carbon emissions and ensuring Wales contributes its fair share to the global challenge of protecting the climate	+64	+51	+13



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