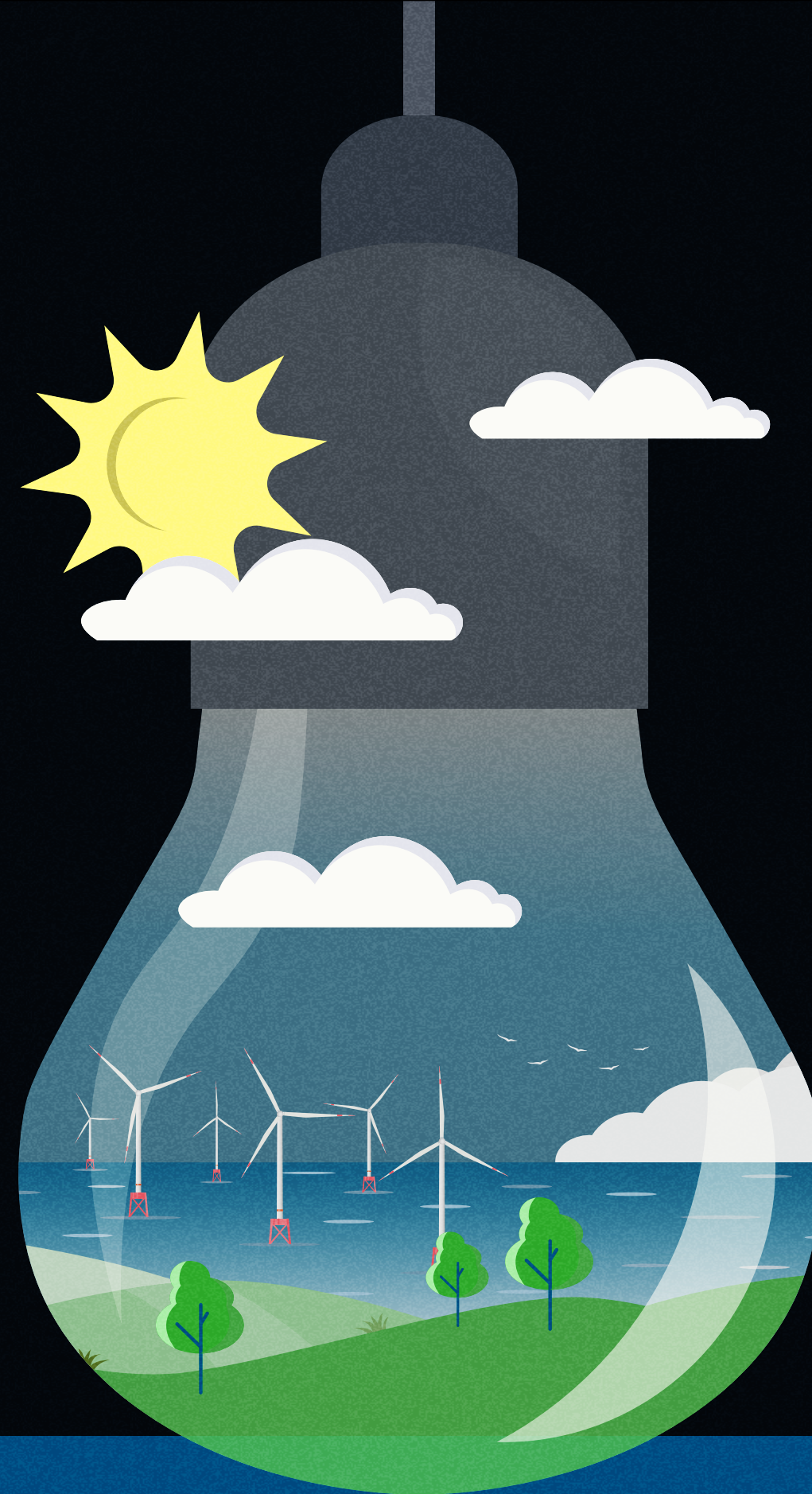




Insights brought to you by
CAVENDISH

Going for green?

What Wales really thinks about energy and climate change.



October 2025

What does the public make of Wales's Net Zero prospects and just how strong is the support for an energy transition?



The current Welsh Government has ambitious plans to make Wales self-sufficient in renewable energy. But is the public on board – and crucially, what does it think about the cost of this when funding for critical public services is under such pressure?

Ministers have been vocal in their pursuit of an energy transition to Net Zero by 2050. To help achieve that, they have set a target of 100% of Welsh electricity consumption being generated by renewable sources by 2035. With electricity demand expected to rise sharply in the coming years, this is hugely ambitious.

Decarbonising our energy supply is now a hot topic which divides both political and public views. With just months until the next Senedd elections, Cavendish Cymru has polled members of the Welsh public to see where they stand on tackling climate change and building the critical infrastructure essential for an energy transition. We've sought their views on funding that transition when both their pockets and the public purse are feeling the pinch.

Renewable projects face barriers, including insufficient grid investment, a slow planning system, opposition from small but vocal coalitions of residents, and growing scepticism among some politicians about Net Zero policies.

However, this report demonstrates that the majority of the public supports greener energy sources such as onshore wind and solar, both in their local areas and across the country more broadly, despite strong opposition from some politicians.

Key findings.

Our polling shows:

- There's broad support for energy transition but, with people across Wales still feeling the pinch in their pockets, support for climate change policies and Net Zero targets drops if it is likely to impact on their household finances
- A significant majority of all respondents back renewable energy, such as onshore wind and solar, though there is a difference between party voters and their support for renewable energy.
- When it comes to electricity transmission, over half of the population would prefer cables to be undergrounded. However, when costs and environmental impacts are mentioned, this drops significantly to less than a third.

79%

of those intending to vote for Plaid Cymru at the Senedd elections **support onshore wind**

and

92%

support solar

with

84%

and **92%** support amongst those **intending to vote Labour**

Our methodology.

In August 2025, Cavendish commissioned YouGov to conduct polling to help us understand the views of people in Wales regarding energy infrastructure.

1101 people aged 16 and over were polled across Wales.

That said, even

50%

of those who intend to vote for Reform **support onshore wind,** and **64% of them support solar**

Climate change and Net Zero policies.

Has the phrase Net Zero become tarnished? Is there a difference in response when you ask people about tackling climate change or reaching Net Zero targets?

Our research shows that there is a significant difference in support, which should be considered when communicating with the public, but that the variance is not very large.

49% say tackling **climate change** is important

VS

40% who support reaching **Net Zero** by 2050

25% support **climate action** even if household finances are affected

VS

22% who support **Net Zero** policies even if household finances are affected

14% believe the Welsh Government should not pursue any policies to tackle **climate change**

VS

18% say policies to reach **Net Zero** targets by 2050 should not be pursued at all



Party support and climate change policies.

Around **70%** of those likely to vote for Labour or Plaid Cymru next May think it is important that the Welsh Government continues to pursue policies to tackle climate change

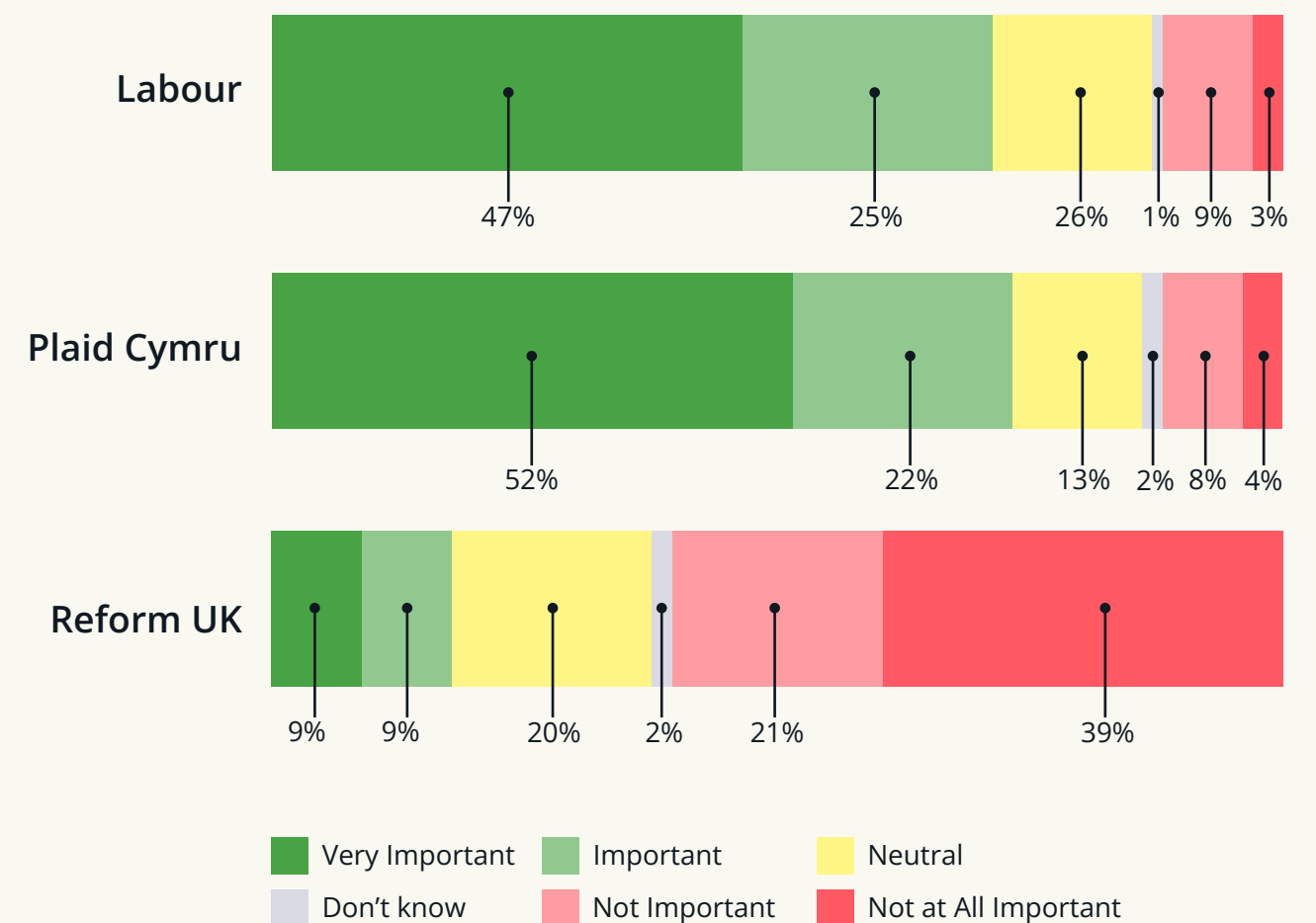
Compared to **26%** of right-leaning voters. This drops to just **18%** of likely Reform voters

and **66%** of those likely to vote for Plaid Cymru next May

and **52%** of likely Labour voters think it is important that we reach Net Zero targets by 2050, compared to just 15% of Reform supporters

How important is it that the Welsh Government continues to pursue policies to help tackle climate change?

By Senedd Voting Intention



Variance across age ranges.

Younger people are much keener than older generations to see the Welsh Government pursue policies to tackle climate change and reach Net Zero.

67% of Gen Z respondents (born between 1997 and 2012) believe tackling **climate change** is important

compared with

41% of Baby Boomers (born 1946-64)

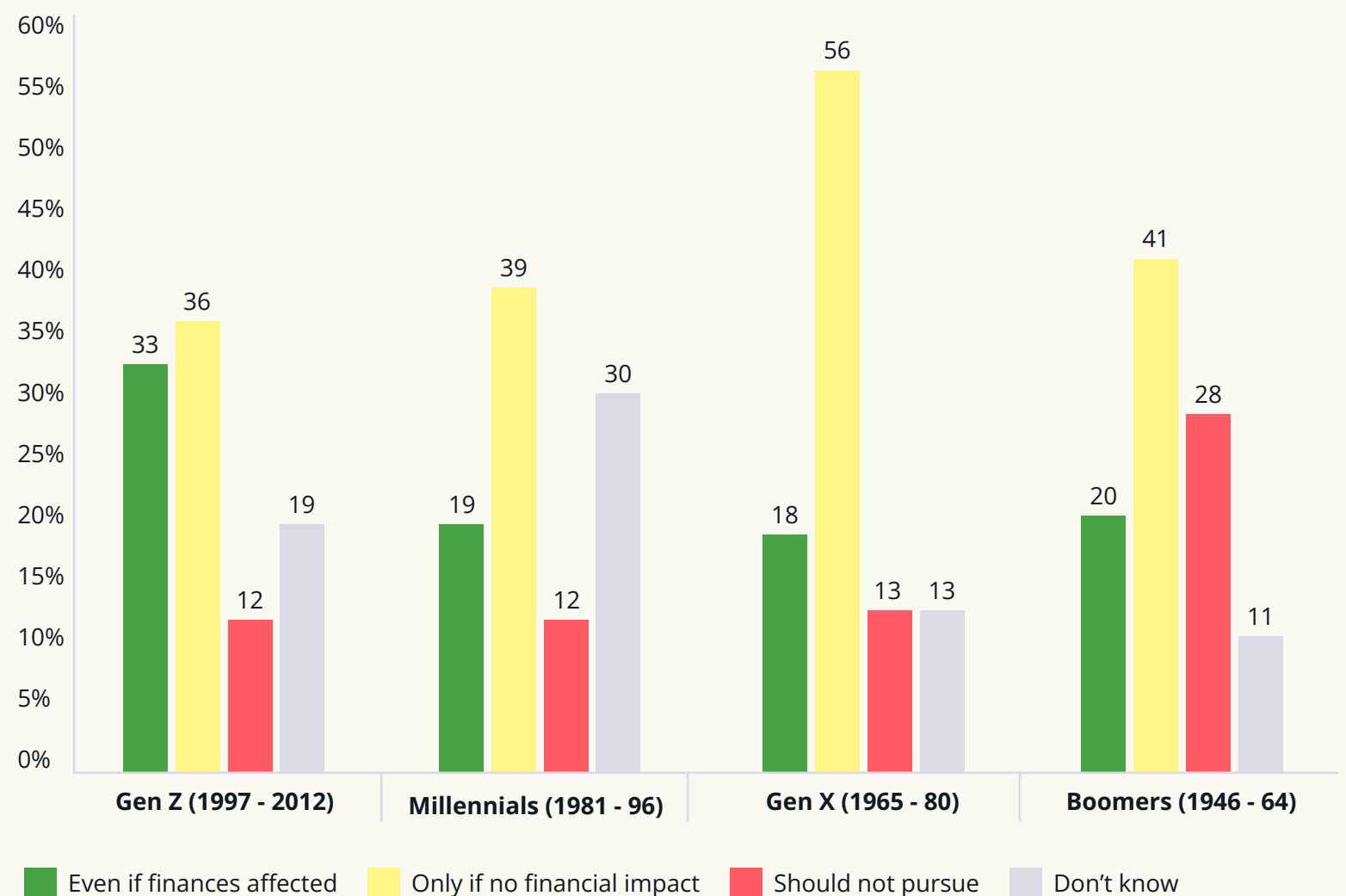
64% of Gen Z believe it's important that the Welsh Government continues to pursue **Net Zero** policies

compared to

33% of Boomers

We asked the respondents if they were more likely to change their support for climate change, and Net Zero, policies if it would cost them money. Again, there was a significant variance between the age ranges, with younger people keen to tackle climate change and reach Net Zero, even if their bills increased.

Household finances and support for Net Zero by generation.



Energy infrastructure in comparison to other developments.

We asked people to **select up to three types of infrastructure they would most and least like to see prioritised in their local area.**

Prioritising investment in local healthcare (55%) is the most popular new development that Welsh residents would like to see, with public transport (34%) and affordable housing (38%) being the next most popular.

Renewable energy infrastructure is the only type of energy infrastructure where more people chose in as a top 3 development priority for their area than picked it as a bottom (top priority for 20%, least for 12%), while energy transmission pylons (top 3: 1%; bottom 3: 30%), battery storage (top 3: 2%; bottom 3: 30%) and non-renewable energy infrastructure (top 3: 6%; bottom 3: 33%) receive a negative reaction.

Developing data and AI infrastructure performed the worst of all amongst the Welsh public's list of priorities (top 3: 2%; bottom 3: 40%).

Local healthcare

① 55%

is the most popular
new development

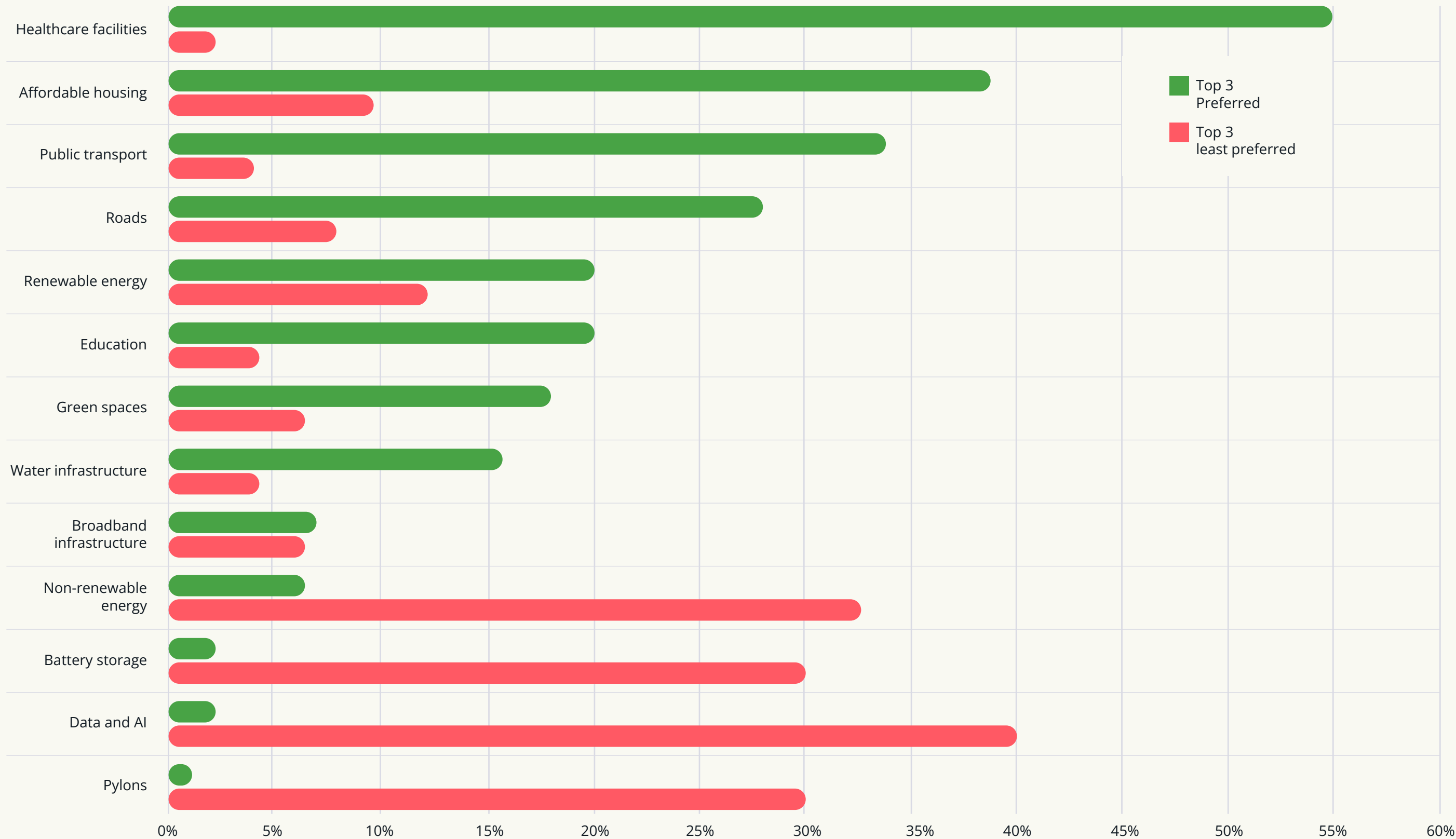
followed
by affordable
housing

② 38%

and public
transport

③ 34%

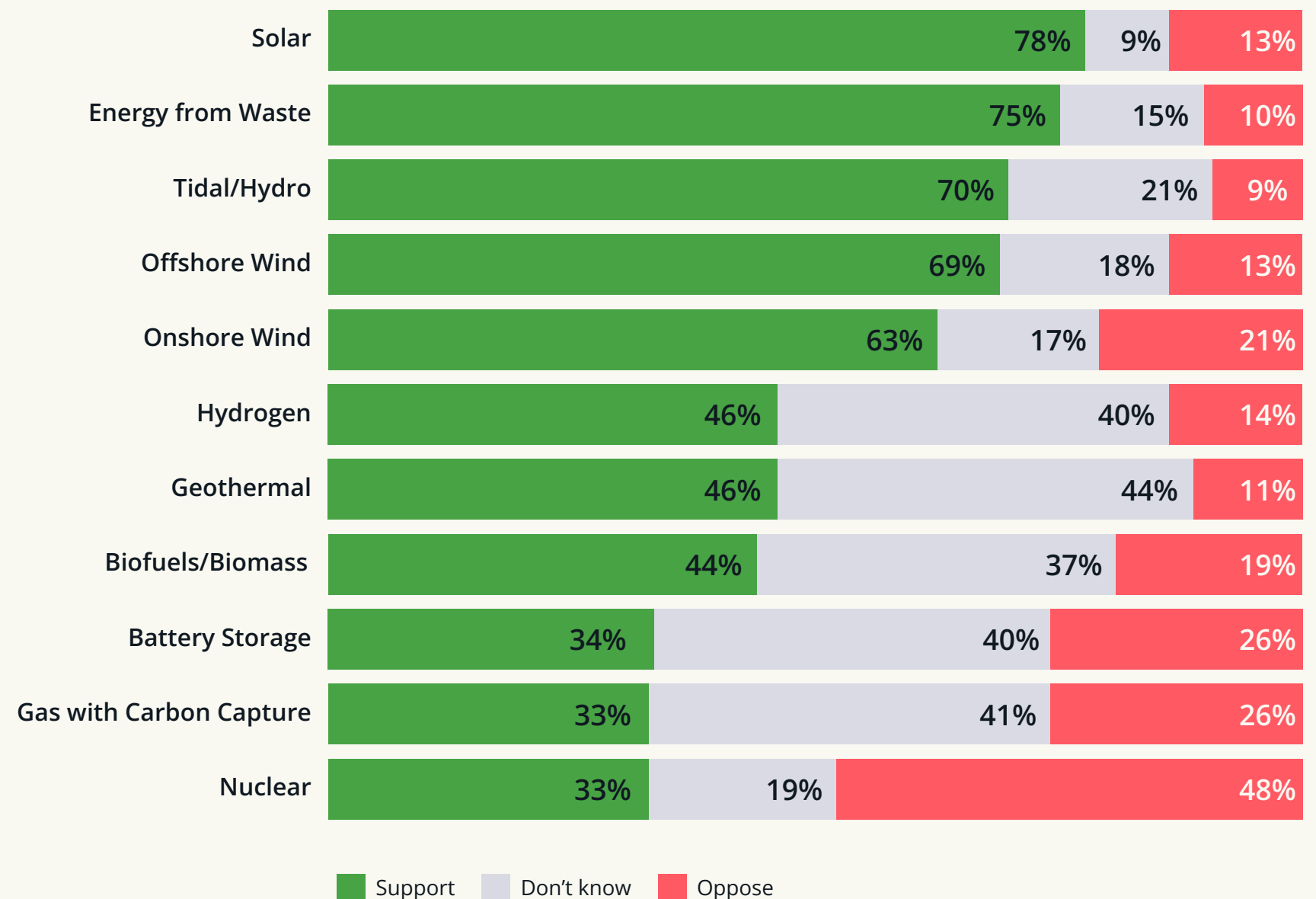
Infrastructure preferences.



Preferred types of energy infrastructure.

We asked the respondents if they would support or oppose certain energy projects in their local area. Solar and onshore wind were widely supported, as were other forms of renewable energy.

Nuclear energy was the only form of energy infrastructure where the opposition outweighed the support. That said, a third of respondents would be supportive of more nuclear energy.



Party support and energy generation.

We looked at voting intention for Senedd 2026, the poll shows a very significant difference in support for renewable compared to non-renewable energy infrastructure in their local area amongst the main parties.

92% of likely Labour and Plaid Cymru voters support solar generation

Support for onshore wind in their local area;

84%

Labour supporters

79%

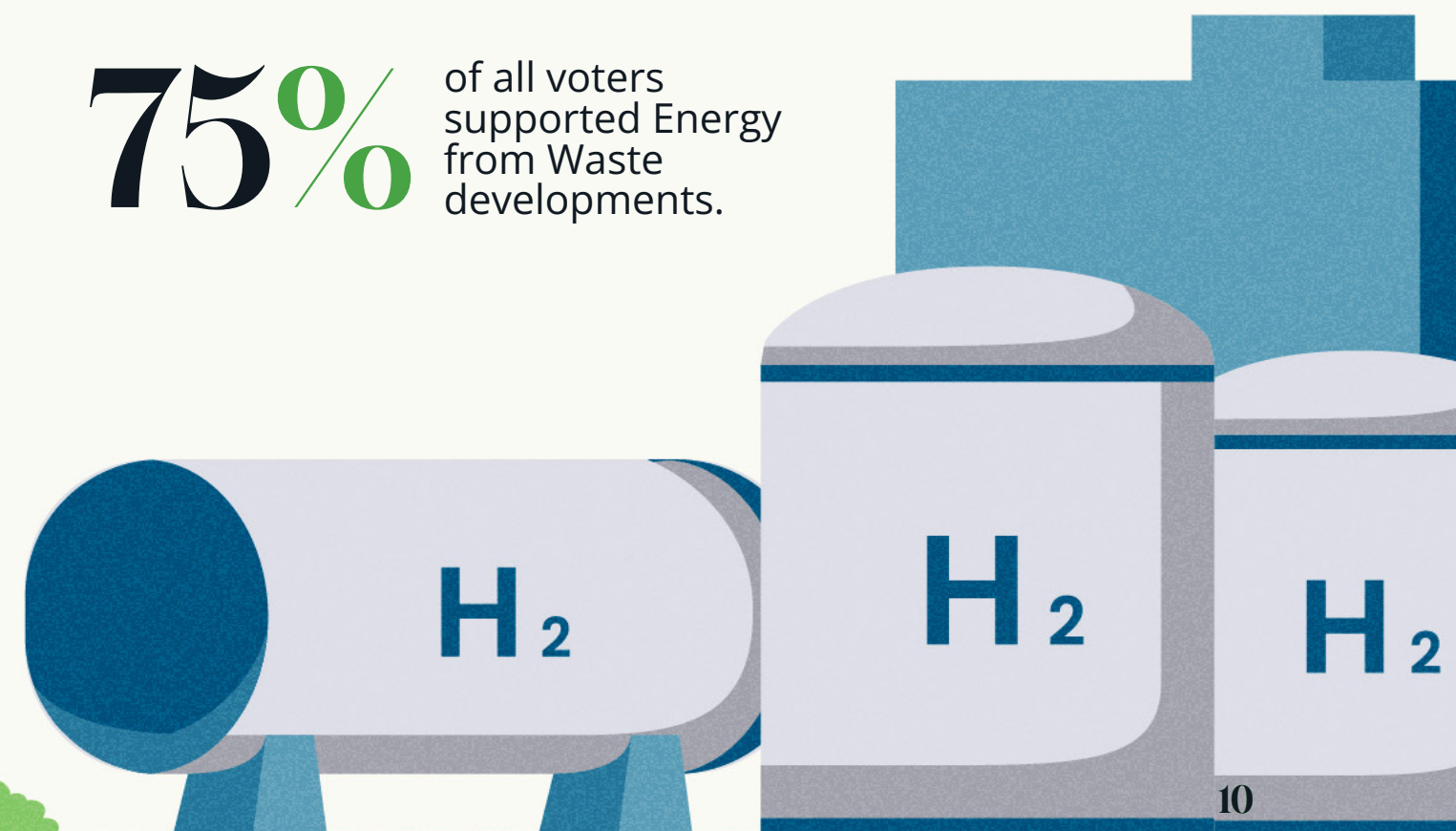
Plaid Cymru supporters

48%

Reform supporters

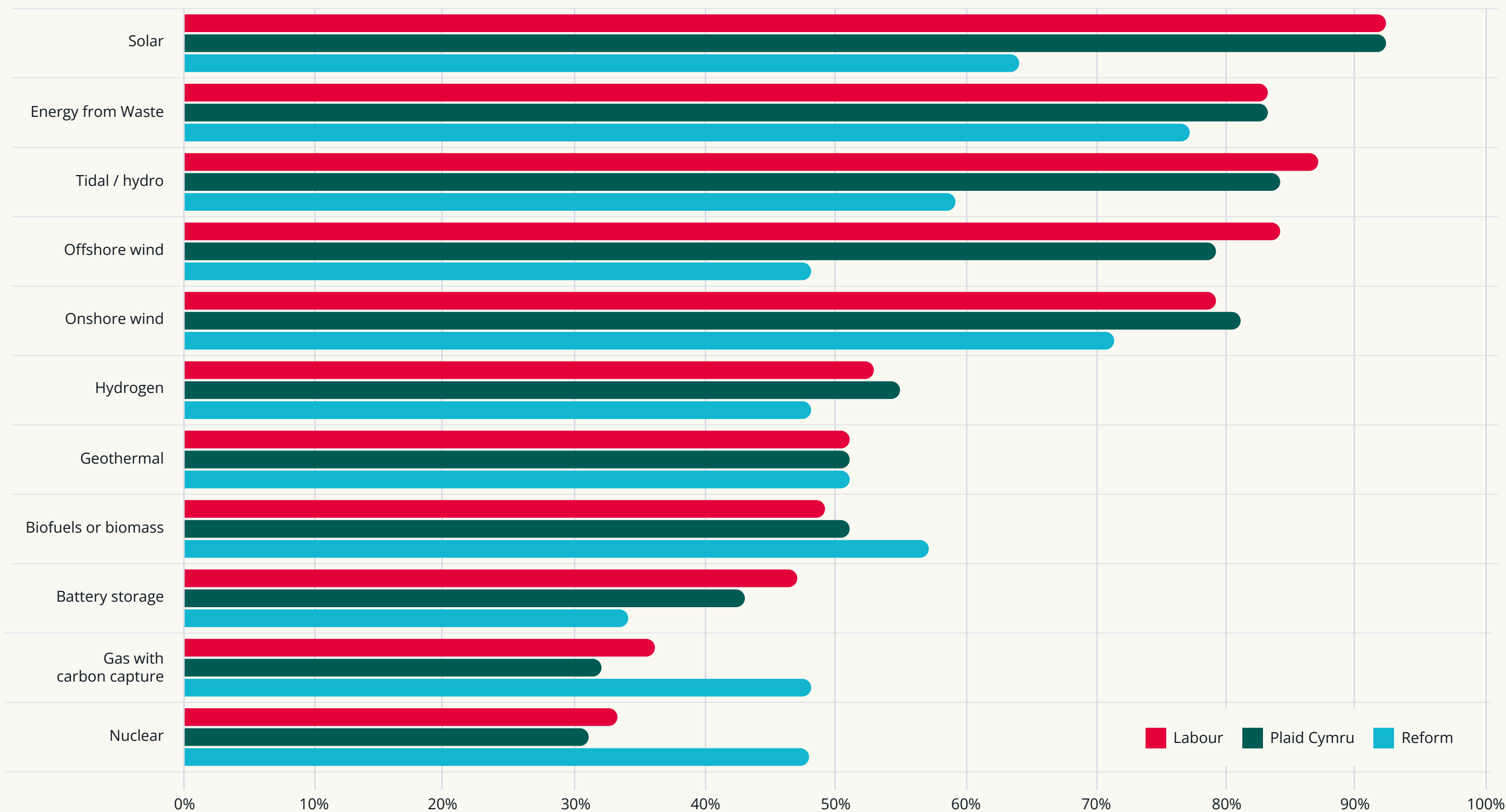
Support for offshore wind across all parties was high, with an average of **69% of all voters** supporting these developments. **48% of likely Reform voters** support nuclear developments, compared to **31% of Plaid Cymru supporters**.

75% of all voters supported Energy from Waste developments.



Support for energy types by party.

By Senedd Voting Intention



Grid infrastructure: Pylons and undergrounding.

Significant upgrades to the electricity transmission network will be essential across the UK to meet our energy needs.

Undergrounding cables is estimated to cost five times as much as building overhead pylons, and can also have a major impact on the landscape, with 40m wide trenches dug through natural habitats that can't be replanted or farmed again.

Our poll sought to understand the extent of public support for pylons or undergrounding cables, both purely on the visual impact on local landscapes, and also when environmental and cost implications were considered. We conducted an experiment, splitting the sample into three groups. One group just saw the visual impact argument, one saw the visual impact and cost trade-off, and the final one saw the visual impact and cost and environment impact trade-offs.

There was no significant difference in responses based on age or the region of Wales in which they lived. Rural voters were somewhat more supportive of underground than urban dwellers.

23% of respondents supported new pylons in their local area, with **36% opposing them**

When asked about support for undergrounding cables:

56% supported undergrounding when cost was not mentioned

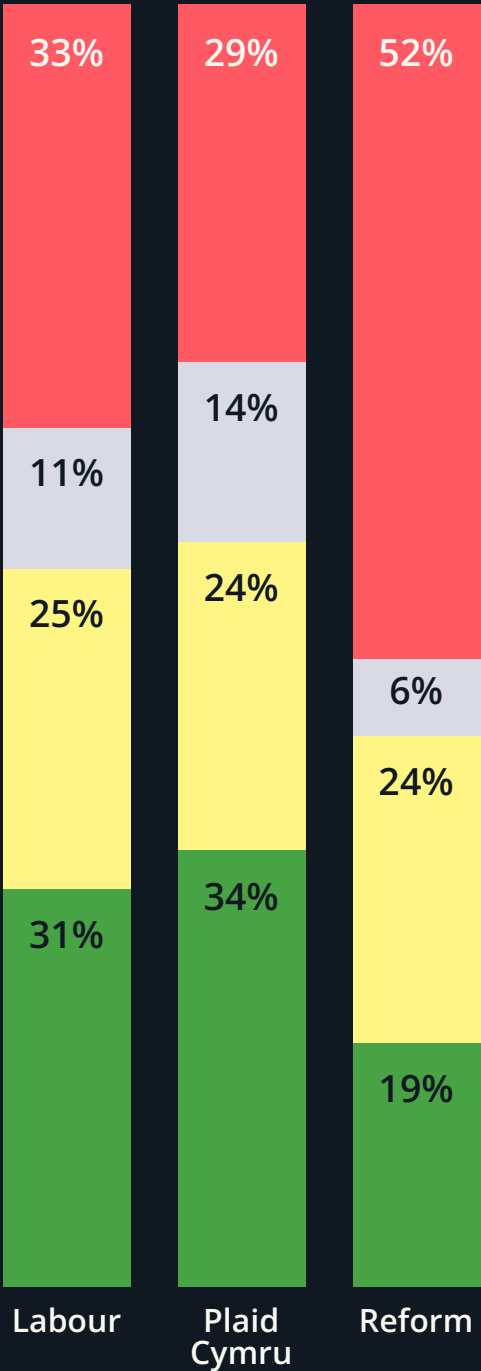
down to:
36% support when the cost was mentioned

down to:
28% support when cost and environmental impact were mentioned



Support for pylons in your local area by party.

There was a significant **difference in party support** when we asked about support for overhead pylons in the local area.

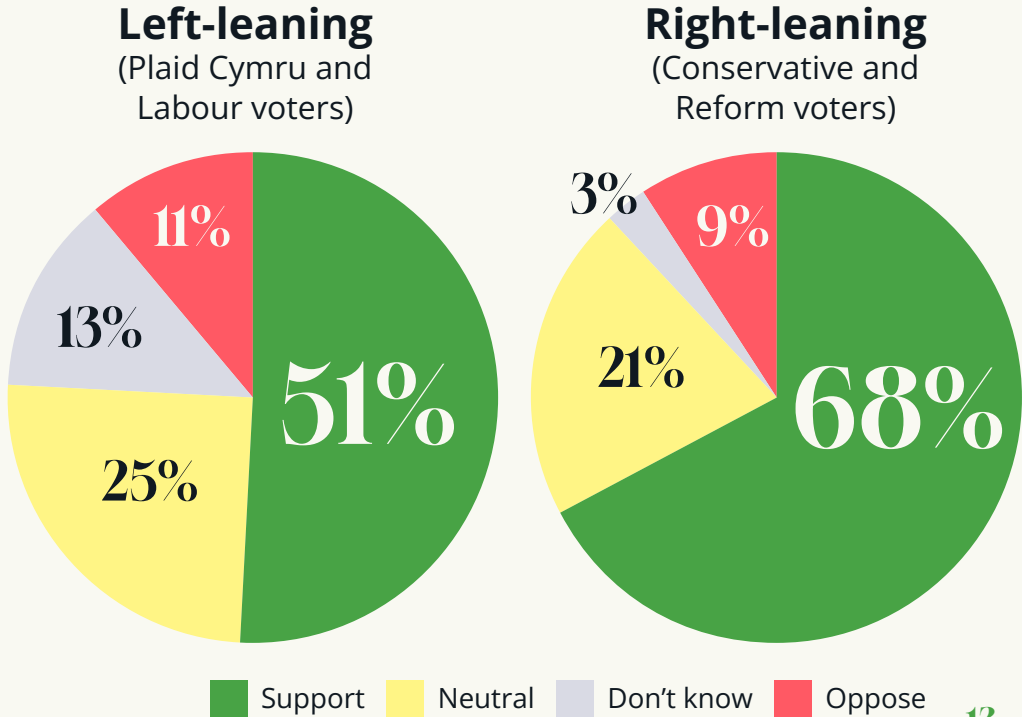


Support
Neutral
Don't know
Oppose

Support/opposition for undergrounding

When asked about undergrounding, there was a greater variance between left- and right-leaning voters, with more than two thirds of right-leaning voters supporting the idea of energy companies being required to underground their cables across the conditions. For example, when just presenting a visual argument, the right-leaning parties are more sure of their position, with only **3% saying they didn't know**, compared to **13% for the left**.

In these pairings it's people who say they would vote Reform and Plaid next year that sway it more towards support for undergrounding, with **73%** of Reform supporters (n=88) in favour and **54%** of Plaid supporters (n=75) in favour.



Diolch.

Cavendish delivers government relations, corporate communications, planning communications and creative services to clients across energy sectors, including solar, battery storage, offshore wind, hydrogen, CCUS, nuclear and more.

To find out more about our findings, how they may impact you, and how to communicate with a wide array of audiences with diverse opinions, contact us using the details below:

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