

The case for hydrogen in the Humber: Results from polling and focus groups



humberhydrogen.co.uk

Research and Insights provided
by More in Common



Acknowledgement

Humber Hydrogen brings together National Gas, Equinor, Centrica and SSE Thermal to develop an integrated hydrogen network across the Humber. By connecting production, transport and storage, it can help the region become Britain's hydrogen heartland and support a cleaner, more secure energy future. Across key sites at Aldbrough, Easington, Saltend, Immingham, Keadby and beyond – the region is an industrial hub at the heart of the energy transition. To achieve this, the network, through the Humber Hydrogen Pipeline (HHP) and Aldbrough Hydrogen Storage projects, will submit proposals under the UK Government's Hydrogen Transport and Storage Business Model processes to determine where the first hydrogen network is built.

More in Common was commissioned by Humber Hydrogen to explore the attitudes of local people towards the proposed hydrogen network. Polling and focus groups were conducted by More in Common. Based on this research, More in Common has drafted this report with editorial independence from Humber Hydrogen. Additional modelled projections cited in this report come from a comprehensive economic analysis of Humber Hydrogen supported by KPMG LLP, commissioned by Humber Hydrogen. Full data tables are available on More in Common's website.

Executive Summary

The Humber was once a powerhouse in coal, steel and textile production. It was a manufacturing hub at a time when Britain prided itself on its role as a major global producer. Its connection to the energy sector is long-standing. In 1968, Lindsey Oil Refinery became the first UK refinery to process North Sea oil. Through the 1970s and 80s, further supporting infrastructure followed and the region established itself as Britain's leading industrial hub for energy production, as well as a leader in heavy industry and manufacturing. From focus group conversations with locals, it's clear that Humber residents look back proudly on their area's rich history and the times when it felt like the region was on the up.

However, like many of Britain's once-thriving powerhouses, globalisation, deindustrialisation and the shift from a manufacturing economy to one built on services has reshaped the area's economic identity.

The Humber today

Today, the region could be classified as one of the most 'left behind' areas of Britain. Locals certainly feel that way. A majority (51 per cent) of people from across Yorkshire and the Humber think their local area is worse than it was ten years ago.

Across the region, people are frustrated about rundown high streets, the loss of vibrancy and security, and above all a significant shift in the availability of good-quality jobs in their area in their lifetime. They blame the lack of jobs and the lack of local growth on the decline of traditional industries

88 per cent of 18-24 year olds in Yorkshire and the Humber think there is a lack of job opportunities for young people growing up where they live today.

in the area, and the failure to create new jobs and industries to replace them.

Young people are especially affected by the region's poor economic and labour market prospects. Three-quarters of the region's population say there is a lack of employment opportunities for young people growing up where they live today. Among 18-24 year-olds in the area, this rises to 88 per cent. Meanwhile, young people in Yorkshire and the Humber are more likely than their age cohorts nationally to say their local area is heading in the wrong direction (46 vs 26 per cent among 18-24 year-olds).

A vision for the future

Much of that despondency is channeled into a strong desire for industry in the area and support for the opportunities it can bring. Both residents of Yorkshire and the Humber and the wider British public think investment in the region is required if the decline the Humber has experienced in the last few decades is to be reversed.

34 per cent of Britons think increased investment in less prosperous areas in the UK would benefit the whole country and just 13 per cent think such targeted investment would come at the expense of other parts of the country.

Furthermore, Yorkshire and the Humber residents see a lack of long-term investment from the UK government (35 per cent) as the second largest barrier to the creation of economic growth and good jobs in their area, behind only the decline of traditional industries (42 per cent).

Both regionally and nationally, Britons think seizing the opportunities offered by the transition to cleaner forms of energy like hydrogen will be central to rejuvenating the Humber's economic prospects.

Two-thirds of Britons think investing in new clean energy industries in areas that have experienced industrial decline would make the country better (65 per cent), while 62 per cent think it would benefit places like the Humber.

Meanwhile, Yorkshire and the Humber residents overwhelmingly think that government investment in generating cleaner forms of energy in their local area would be a good thing (61 per cent). Placing the Humber at the forefront of the UK's energy transition.

This stems not just from a positive consensus around renewables (such as wind, solar and hydrogen power) in the area (66 per cent feel positive about renewable energy sources), but from a sense that the energy sector is uniquely important to the area's identity. Equally, locals recognise the region's natural geographic advantages and think positioning the region at the forefront of Britain's transition to cleaner energy is a realistic prospect. This offers a real opportunity to government and policymakers: The Humber is a region that is well-positioned to play a role in the future of Britain's energy security and keen to be a leader in the country's energy transition. Its citizens are eager for investment to make that a reality.

Crucially, support for clean energy investment transcends divisions around net zero. Investment in the development of clean energy in the region is more likely to be seen as a good thing rather than a bad thing – even among those who are opposed to the UK government's net zero target (32 per cent of those who oppose the net zero target think it would be a good thing, vs 28 per cent who say it would be bad). In focus group conversations, it's clear that even those who are climate sceptic are aligned with the approach laid out by Hull and East Yorkshire Mayor Luke Campbell – championing the opportunities that renewable energy investment can bring to the area, even if they hold concerns at the speed at which the UK government is approaching the transition more broadly.

Amid this underlying desire for investment into the region, whatever form that may take, local residents overwhelmingly support the development of hydrogen infrastructure in the area, even if they lack familiarity with hydrogen as an energy source.

Once provided with background information on it, locals support the government investing funds into the Humber Hydrogen project at an almost five to one margin (50 per cent support; 11 per cent oppose).

Young people are especially supportive of the project, with a majority of under-35s saying Humber Hydrogen will be a good thing for the community (52 per cent of 18-24 year-olds; 64 per cent of 25-34 year-olds).

Overall, local residents believe that investment into clean energy and Humber Hydrogen represent a real opportunity for government and industry alike to regenerate and reposition the Humber region as a leader in the UK's transition to clean energy.



One-page summary

Regional decline

- 40 per cent of Yorkshire and the Humber residents think their area is heading in the wrong direction.
- 64 per cent say the types of jobs available in their area have got significantly worse in their lifetime.

Young people in the Humber worry about their future

- 88 per cent of 18-24 year olds in Yorkshire and the Humber think there is a lack of job opportunities for young people growing up where they live today.

Clean energy can turn the region around

- 66 per cent of Yorkshire and the Humber residents feel positive about clean energy sources.
- Residents expect local workers and their families to be the primary beneficiaries of investment into clean energy generation in the area.

Clean energy investment transcends net zero divides

- 40 per cent of locals who oppose the government's net zero target feel positive about renewable energy.

Understanding of the sector enhances support for investment

- Yorkshire and the Humber residents who have a connection to the energy sector feel especially positively about clean energy.

Humber Hydrogen

- Locals support government investment to develop hydrogen transport infrastructure in their region at a nearly four to one ratio (38 per cent vs 10 per cent).
- When given additional details as to the specifics of Humber Hydrogen, support rises further – 47 per cent say the development of Humber Hydrogen would be a good thing for their community.

The Seven Segments

Using extensive research into Britons' core beliefs, their values and behaviours, More in Common has developed a unique segmentation of the British public. This segmentation allows us to look upstream not just at what different groups think, but why they think it, reflecting fundamental differences between groups in how they relate to authority, change, community and the future.

More in Common's analysis produces seven segments within the British population, which are referred to throughout this report:

Progressive Activists

12 per cent of the population

A highly engaged and globally-minded group driven by concerns about social justice. Politically active, but feeling increasingly alienated from mainstream party politics, they prioritise issues such as climate change and international affairs. Occasionally outliers on social issues, they maintain a strongly held and sometimes uncompromising approach to their beliefs.

Incrementalist Left

21 per cent of the population

A civic-minded, community-oriented group holding views which are generally left-of-centre but with an aversion to the extreme; they prefer gradual reform over revolutionary change. They trust experts and institutions yet are largely tuned out of day-to-day politics and can be conflict-averse, stepping away from issues they see as particularly fraught or complex.

Established Liberals

9 per cent of the population

A prosperous, confident segment who believe the system broadly works as it is and who trust experts to deliver continued progress. They have a strong belief in individual agency which can make them less empathetic to those who are struggling. Institutionally trusting, they maintain faith in democratic processes and have a strong information-centric way of engaging with issues.

Sceptical Scrollers

10 per cent of the population

A digitally-native group whose unhappiness with the social contract means they have lost faith in traditional institutions and seek alternative sources of truth online. Often shaped by their experience of the Covid pandemic, they prefer individual influencers over mainstream media and are increasingly drawn to conspiratorial thinking.

Rooted Patriots

20 per cent of the population

A patriotic but politically untethered group which feels abandoned and overlooked by political elites and yearns for leaders with common sense, but does not want to overthrow the system as a whole. They are particularly concerned about community decline and the pressures of migration. Interventionist on economics but conservative on social issues, they have shaped much of Britain's politics over the past decade.

Traditional Conservatives

8 per cent of the population

Respectful of authority and tradition, this group believes in individual responsibility and established norms that have served them well. Nostalgic for the past but optimistic about the future, they are deeply sceptical of many forces of change such as immigration or the path to net zero.

Dissenting Disruptors

20 per cent of the population

Frustrated with their circumstances and with an appetite for radical solutions, this group craves dramatic change and strong leadership. Highly distrustful of institutions, opposed to multiculturalism and feeling disconnected from society, they are drawn to political movements that promise to overhaul the status quo and put people like them first.



Chapter 1

Regional decline

Key takeaways

- 40 per cent of Yorkshire and the Humber residents think their area is heading in the wrong direction.
- 64 per cent say the types of jobs available in their area have got significantly worse in their lifetime.
- They blame this principally on the decline of traditional industries without enough new industries and jobs being created to replace them.

In focus group conversations, it's clear that Humber residents look back fondly on previous decades. They speak of a time when thriving industries served as the lifeblood of their region, supporting vibrant high streets and offering plentiful chances for young people who wanted to work hard and develop trades, giving them stable and secure employment opportunities they could be proud of. Crucially, they describe the Humber in this era as a place where you could be successful without needing to look elsewhere for opportunity.

It was very much an industrial part of the world. I mean, during World War II, it was hugely vital, this region, one of the most bombed places outside of London because of the infrastructure and what it could offer. But now it's just completely faded away from any of that.

Will, Financial Services, Hull West

The Princess Quay and the shopping centres used to be really, really good 20 years ago. Now where we go shopping in Leeds and York and different places, they don't go to Hull to go shopping anymore.

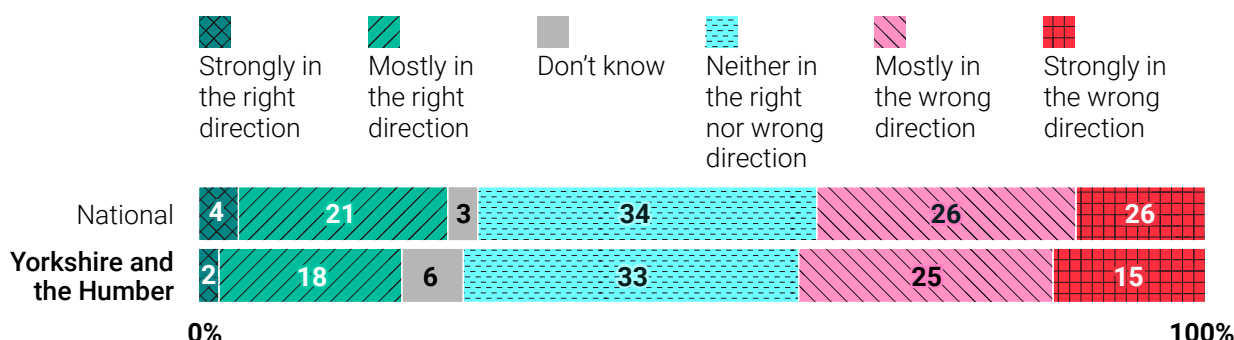
Dave, Engineering Manager (Food Manufacturing), Hull

In terms of industry, obviously the Steelworks was British owned... that's probably something that people within the area were proud of.

Nick, Coffee Manufacturer, Scunthorpe

GRAPH 1 Yorkshire and the Humber residents are less likely to think their area is heading in the right direction than the wider British public

Thinking specifically about your local area, do you think it is heading in the right direction or the wrong direction?



However, the decline the area has experienced in recent decades has caused locals to overwhelmingly feel negative about the state of their local communities today, as well as the country more broadly. A majority of residents think their local area is worse than it was ten years ago (51 per cent) and 40 per cent think it is heading in the wrong direction.

They are particularly downbeat because they feel things didn't used to be this way. Two-thirds of all residents in the area say the types of jobs available in their area have got significantly worse in their lifetime, while a similar proportion say that there are not enough opportunities for people to find a job they can be proud of today but there used to be (62 per cent).

Scunthorpe used to be the Steelworks. Everybody used to want to come and work here. You used to want to be relocated here to work at the Steelworks. It used to be a fabulous place, and then all of a sudden it's just full of crime and people that just don't care about the area.

Jenna, Healthcare, Scunthorpe

While people in other parts of Britain do hold similar concerns about their own communities, this concern about the availability of good quality jobs and opportunities forms a much more prominent part of focus group conversations in the region.

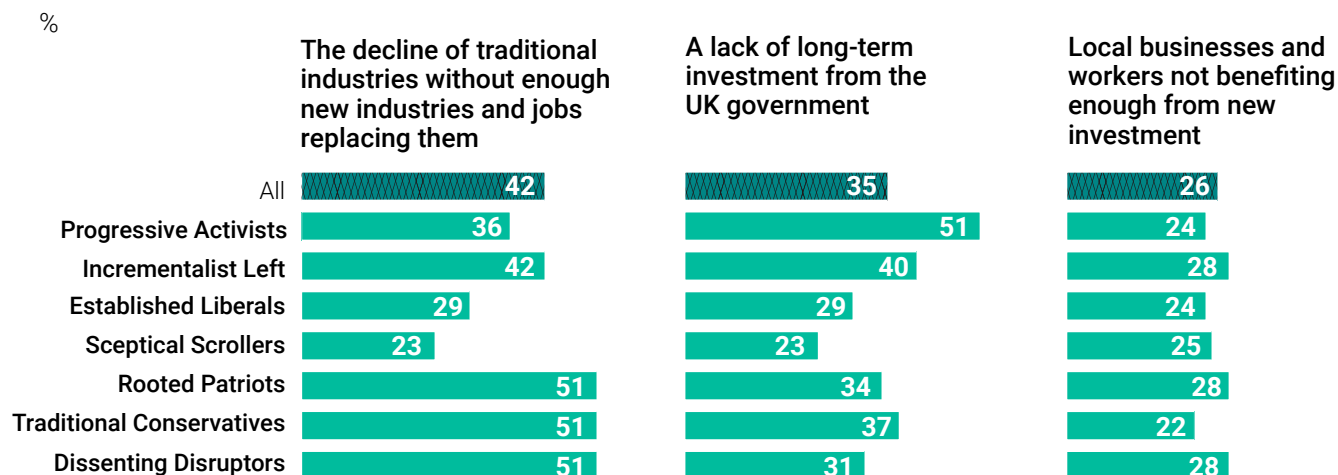
I've lived here all of my life and I don't know, it does seem to be going a bit downhill if I'm honest.

Claire, Stay at Home Mum, Goole

Commentators often bestow the tag of being 'left behind' upon post-industrial regions of the UK, like the Humber, that have struggled to find an economic grounding and identity in a globalised world. It's clear from focus group discussions with local residents that they feel this is an apt description. These 'left-behind' areas extend beyond Yorkshire and the Humber. The decline in traditional industries without adequate replacements is perceived by the public to be the top barrier to local economic growth and job creation across all regions of Britain, except London, but it is significantly more pronounced in Yorkshire and the Humber.

GRAPH 2 The segment of Yorkshire and the Humber residents dictates which issues they consider the biggest barriers to local growth

Which of the following do you think are the biggest barriers to economic growth and the creation of good jobs in your area? Top three selected options by wider Yorkshire and the Humber population



It was a vibrant place. What I remember of Hull, the nightlife used to be fantastic...it was a fun place to be. You'd come out, everyone was having a good time, but the high street's just gone. It's lost its buzz. There's just nothing there.

Bill, Windows Manufacturer

In addition, right-leaning segments in Yorkshire and the Humber are more likely to cite the decline of traditional industries as the biggest barrier to economic growth in their area (51 per cent among each of Rooted Patriots and Dissenting Disruptors) than they are in other parts of the country. Meanwhile, Progressive Activists in Yorkshire and the Humber are instead more likely than Progressive Activists nationally to blame a lack of long-term government investment (51 vs 37 per cent).

This sense that their area's economic identity has been stripped from it with no replacement has led many to turn their back on traditional politics.



Young people in the Humber worry about their future

Key takeaways:

- 88 per cent of 18-24 year olds in Yorkshire and the Humber think there is a lack of job opportunities for young people growing up where they live today.
- A majority of Yorkshire and the Humber residents think that the region currently gets less than its fair share of government investment (57 per cent).

Yorkshire and the Humber residents don't just think things are worse today than they were in the past, they think things will be worse still in the future. These feelings of despair and concern are most acutely felt over the labour market prospects of young people in the region.

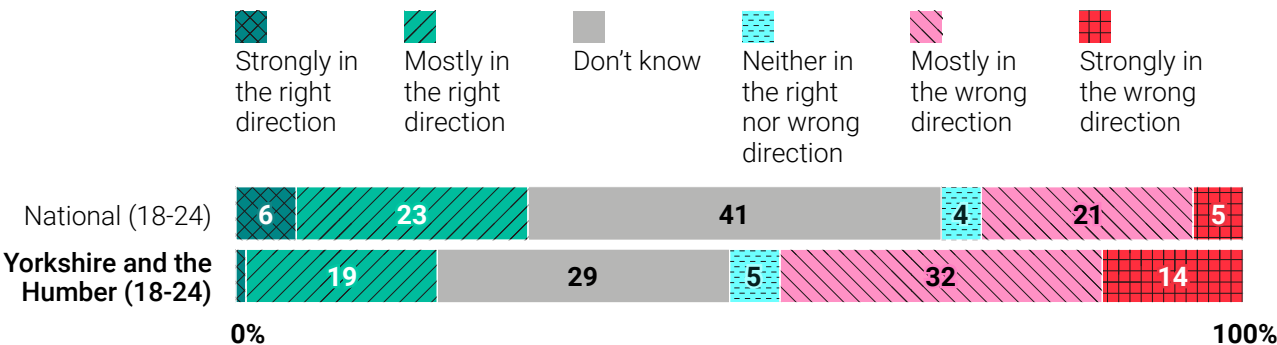
As a result, residents place a distinctively strong emphasis on jobs in the area, or the lack thereof. 75 per cent of Yorkshire and the Humber's population say there is a lack of job opportunities for young people growing up where they live today. Among 18-24 year-olds in Yorkshire and the Humber, this rises to 88 per cent, compared to 82 per cent among the same age cohort elsewhere in the country. Furthermore, 85 per cent of 18-24 year-olds in Yorkshire and the Humber say most local jobs are low-paid or insecure compared with 77 per cent of the same age group nationally. Gen Z Yorkshire and the Humber residents (35 per cent) are also significantly more likely to cite a lack of well-paid jobs as one of the top issues facing their local area than residents of other ages (20 per cent).

I think one of the problems with a lot of northern places, northern cities, is the fact that people have to go to other cities like Leeds and Manchester in order to get high paying jobs. And to stop that, we need better jobs in the region.

Nelson, Admin, Doncaster East

GRAPH 3 Young people in Yorkshire and the Humber are far gloomier about their local area than young people in general

Thinking specifically about your local area, do you think it is heading in the right direction or the wrong direction?





This feeling of decline is driving appetite for change

This overbearing sense of negativity has fomented a stark desire for change and a belief that increased investment is necessary for turning the region around. While the decline of traditional industries is seen as the top barrier to economic growth in the region, the next three most frequently cited barriers are a lack of investment from the UK government (35 per cent), local businesses and workers not benefiting enough from new investment (26 per cent), and difficulty attracting private investment and new businesses (20 per cent).

A majority of Yorkshire and the Humber residents also think that the region currently gets less than its fair share of government investment (57 per cent), compared to 51 per cent elsewhere in the country.

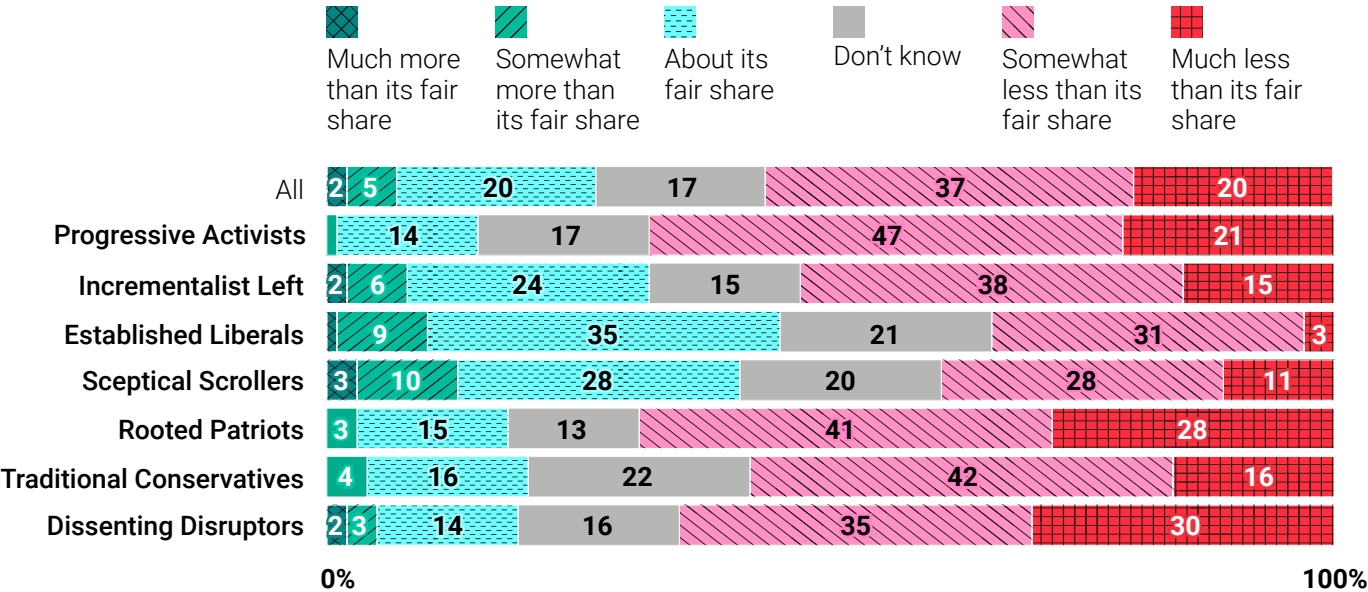
The theme is clear: residents feel a lack of investment and an inability to make use of existing investment is holding the region's fortunes back.

I moved back to Scunthorpe about two and a half years ago, and I was in Colchester for 10. In the time I was there, the amount of investment they put into that, I know it's a city, not just Scunthorpe, it's a small town, but it's ridiculous. The amount of restaurants, bars opening up ... everything just seems to be booming there. They're getting so much money... It's just getting bigger and bigger... Everything just seems to have improved over that time. Whereas I've come back to Scunthorpe and nothing has changed.

Nick, Coffee Manufacturer

GRAPH 4 Politically disaffected segments are most likely to think Yorkshire and the Humber doesn't get its fair share of investment

Thinking about UK government investment, do you think your region receives...?



This feeling of being overlooked by central government is particularly pronounced among Progressive Activists, Rooted Patriots and Dissenting Disruptors in Yorkshire and the Humber – among whom the proportion who feel the region doesn't get its fair share of government investment rises to 68, 69 and 65 per cent respectively. These segments are not united by ideology (Progressive Activists are the most socially liberal segment and Dissenting Disruptors the least) but a conviction that the UK system is designed to benefit those at the top, while ordinary people are left behind. In Yorkshire and the Humber it's clear this perceived breakdown of the social contract extends to the regional or place-based level, as well as the individual level.

I would say to be fair, we're probably bottom of the list as well [for investment], or at least it feels like it anyway.... it'd probably go to places like London and your tourist traps first and then it'll just filter down. It's almost like whatever's left, we'll just maybe get a slice of it.

Cian, Accountant (Food Manufacturer)

It's just not got the funds that it needs to be able to progress into being something spectacular like Sheffield ... it's just sort of stuck. It's just failing.

Jenna, Healthcare, Scunthorpe

Crucially, this is not just a self-diagnosis. The region's stagnation is recognised by the wider public. 42 per cent of Britons believe their area is economically better off than the Humber – just 17 per cent think it is worse off. The wider public doesn't just recognise the problem but backs solutions. A plurality (34 per cent) of Britons believe that increased investment in less prosperous areas in the UK would benefit the whole country. The public is especially likely to think investment in one sector in particular could help turn around traditional manufacturing towns: clean energy. Two-thirds of Britons think investing in clean energy industries in areas that have experienced industrial decline would make the country better (65 per cent).

Chapter 2

The role the transition to clean energy can play in improving fortunes

Key takeaways:

- 66 per cent of Yorkshire and the Humber residents feel positive about clean energy sources.
- 65 per cent think the energy sector is important to the area's economy.
- 55 per cent of Yorkshire and the Humber residents under the age of 45 say the energy sector is important to their area's sense of identity.
- Residents expect local workers and their families to be the primary beneficiaries of investment into clean energy generation in the area.

Yorkshire and the Humber residents view renewable energy sources positively and believe investment in the clean energy sector could bring real benefits locally. While they have limited existing knowledge about hydrogen as an energy source, from focus group conversations it is clear that they see it broadly as another form of clean or low-carbon energy. Consequently, where this report draws conclusions about what the public think about clean energy sources it is reasonable to assume these hold for hydrogen specifically.

The basis of support for investment in the clean energy sector is simple: people in Yorkshire and the Humber feel positive about clean energy sources (66 per cent). Just 12 per cent feel negative. This is broadly in line with the national picture (68 and 11 per cent). Indeed, Yorkshire and the Humber residents overwhelmingly think that government investment in developing clean energy generation in their area would be a good thing (61 per cent say it would be a good thing compared to just 8 per cent who think it would be a bad thing).

61 per cent say clean energy investment in Yorkshire and the Humber would be a good thing compared to just 8 per cent who think it would be a bad thing.



There are three key benefits locals envisage from this kind of investment.

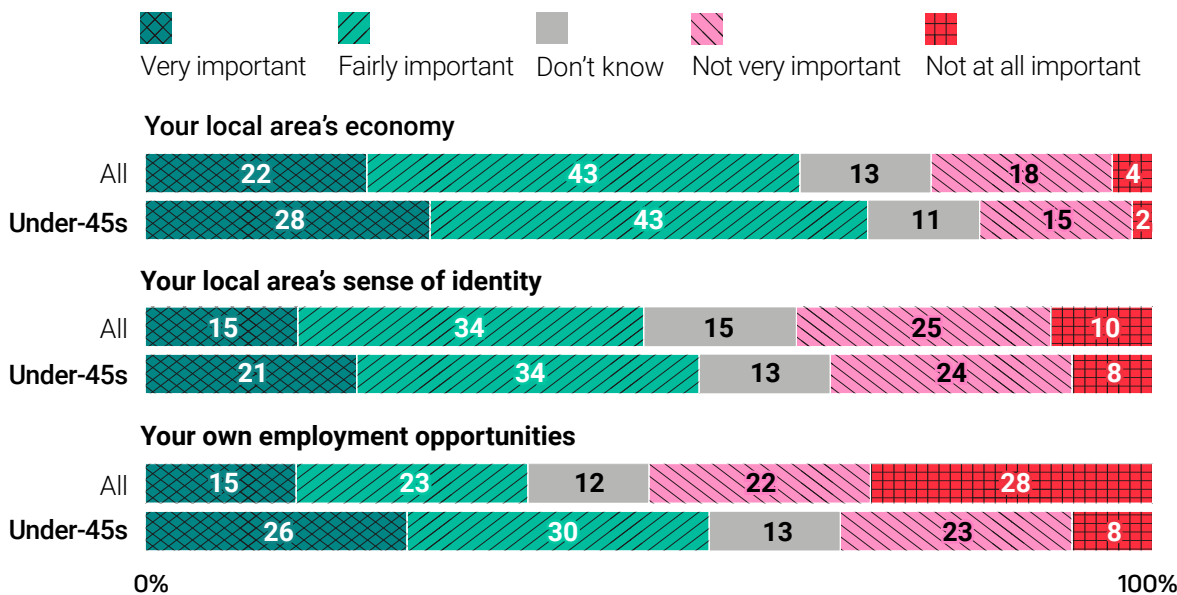
1 First, there are economic benefits. Residents in the area believe that the energy sector is important to the area's economy (65 per cent) and personal employment opportunities (38 per cent). Young people in the region see the potential of the energy sector as being particularly important. A majority of under-45s in the region say the energy sector is important to their own employment opportunities (56 per cent) and 71 per cent think it's important to their area's local economy. Meanwhile, the proportion saying local investment in clean energy would be a good thing rises to 68 per cent among 18-24 year-olds and 76 per cent among 25-34 year-olds - 12 percentage points higher than the share of 25-34 year olds saying this nationally.

If it brings employment, then it can only be a good thing. If you've got people with degrees that are able to help assist with that, then they will stay in that area or come back if they've done and got a degree, they'll come back to the Humber region and they've got money then to spend. So it all helps with the economy.

Martha, Admin, Scunthorpe

GRAPH 5 The energy sector is particularly important to under-45s in Yorkshire and the Humber

How important or unimportant would you say the energy sector is to the following?



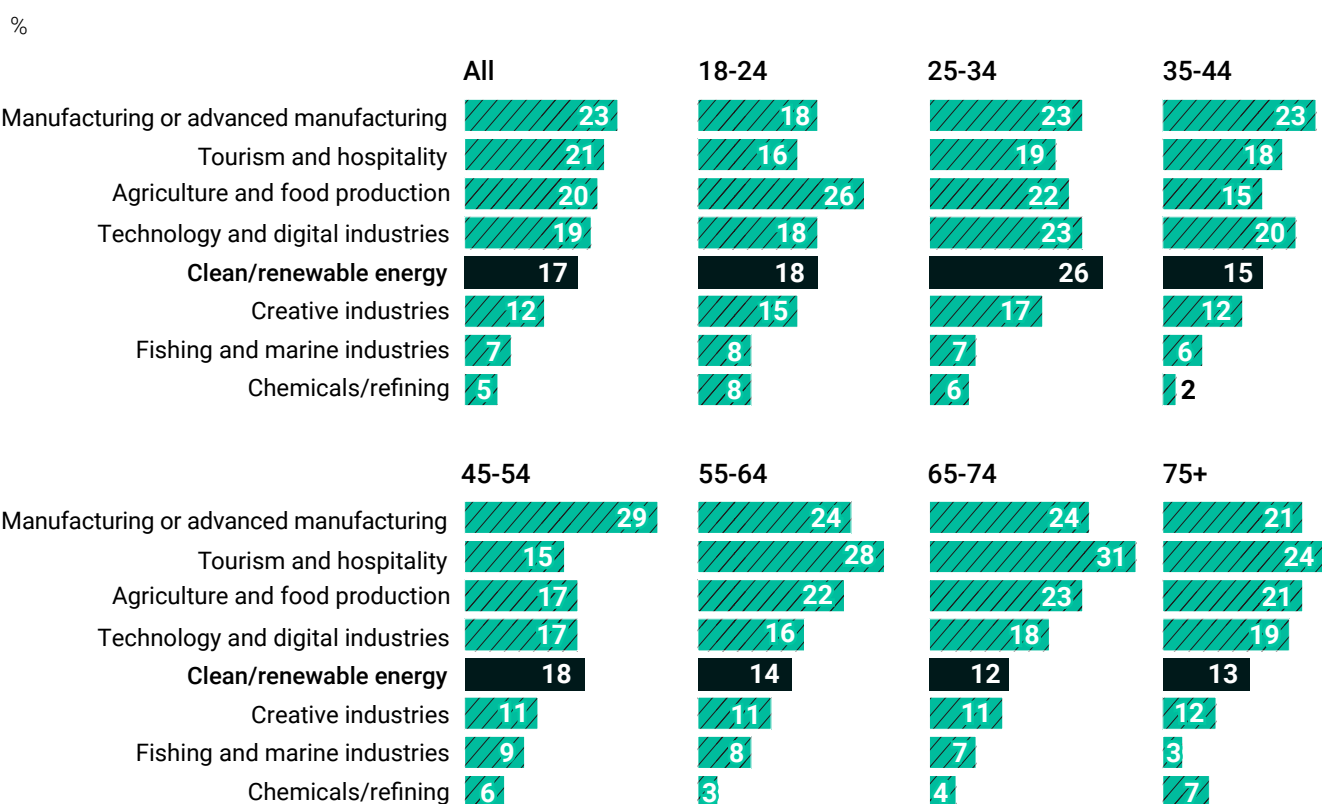
Local sentiment is in line with independent economic analysis, which estimates that **Humber Hydrogen could generate up to £17 billion GVA** and produce a fiscal contribution of up to £5.9 billion.

2 The second benefit revolves around identity and the perception. People believe their region is uniquely placed to drive growth in the clean energy sector – with young people in the region particularly likely to say this. Asked if there are any industries the region is especially well-placed to develop, Gen Z Yorkshire and the Humber residents were particularly likely to cite clean/renewable energy (22 per cent), with only agriculture and food production ahead of it (23 per cent). Meanwhile, a majority of Yorkshire and the Humber residents under the age of 45 say the energy sector is important to their area's sense of identity (55 per cent).



GRAPH 6 25-34 year-olds in Yorkshire and the Humber are most likely believe their region is best-placed to develop clean energy

Which of the following economic sectors/industries do you think your region is best-placed to develop, compared to the rest of the country?



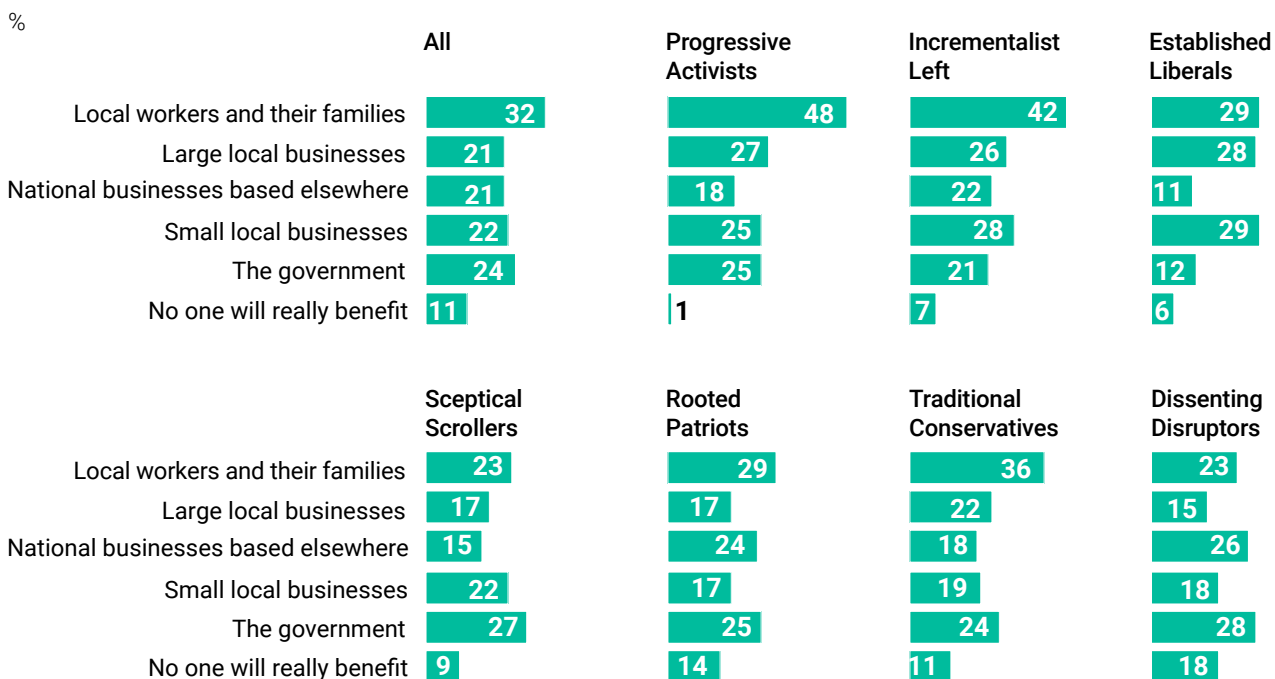
3 The third factor is the belief that such investment would genuinely benefit locals. Yorkshire and the Humber residents expect local workers and their families to be the primary beneficiaries of investment in clean energy generation in the area (32 per cent). They are seen as the principal beneficiaries by all segments other than Sceptical Scrollers (for whom they are second) and Dissenting Disruptors (for whom they are third). Progressive Activists (48 per cent), the Incrementalist Left (42 per cent), and Traditional Conservatives (36 per cent) are the segments most emphatic in their belief that local workers and families will be the biggest beneficiaries. In focus group conversations, it's clear that the already burgeoning presence of the clean energy sector in the region, and the first-hand knowledge of individuals who are working in it, is driving a real sense among local residents that clean energy growth is something either their community or themselves personally will benefit from.

In Hull, we've got Siemens who make the wind turbine blades and whatnot, and I know a lot of people who do work there, they wouldn't have jobs potentially anywhere near the level they have...manufacturing creates an awful lot of jobs for an awful lot of people.

Will, Financial Services, Hull West

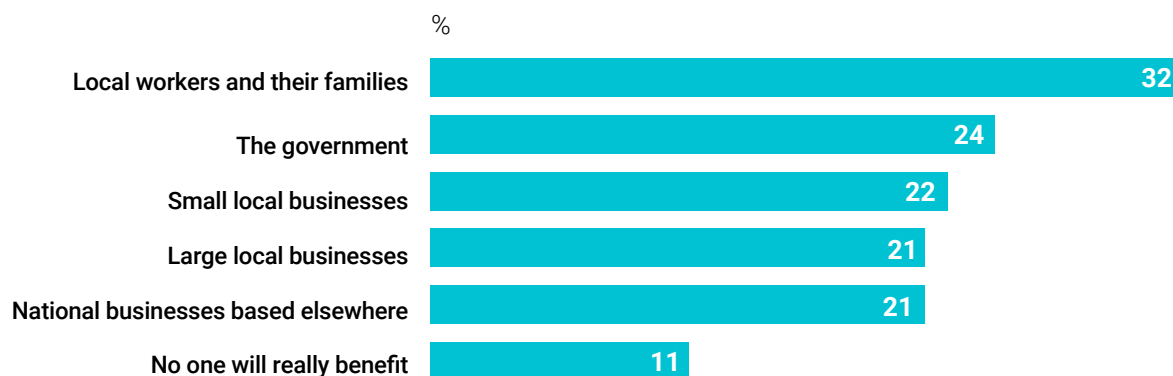
GRAPH 7 Local workers are seen as the top beneficiaries of renewable growth across almost all segments

Who do you think would benefit most from the growth of the renewable energy industry in your area?
Select up to 2.



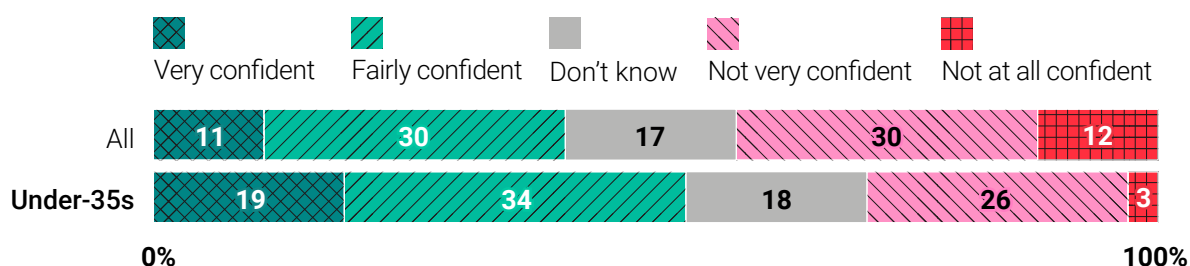
GRAPH 8 Yorkshire and the Humber residents think local workers will benefit most from renewable investment

Who do you think would benefit most from the growth of the renewable energy industry in your area?
Select up to 2.



GRAPH 9 Under-35s in Yorkshire and the Humber are more confident renewables deliver lasting benefits

How confident, if at all, are you that major investment in renewable energy projects in your region would deliver lasting benefits?



Investment in clean energy is viewed as an investment for the community rather than for shareholders or outside interests – 38 per cent say either local large or small businesses would be the primary beneficiaries compared to just 21 per cent who say businesses based elsewhere. Young people, in particular, think the local benefits will offer more than a short-term spike, with a majority (54 per cent) of under-35s in the region saying they are confident investment in clean energy projects will deliver lasting benefits for local people.



Support for clean energy investment extends beyond just those who support net zero

Key takeaways:

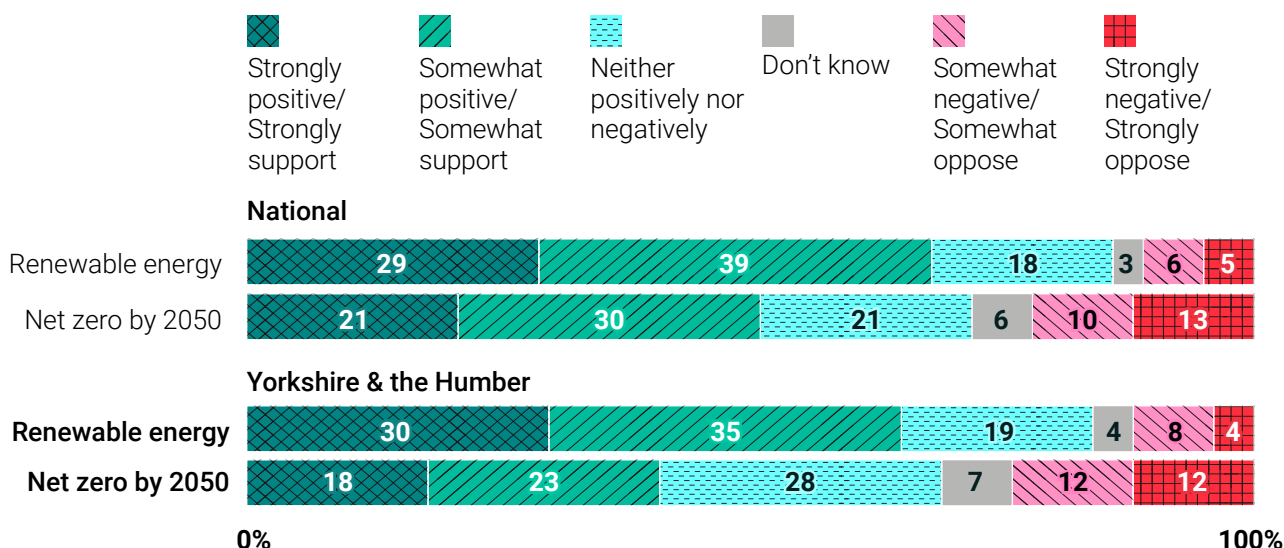
- 66 per cent of local residents feel positive about renewable energy compared to 41 per cent who support the government's net zero target.
- 40 per cent of locals who oppose the government's net zero target feel positive about renewable energy, showing an often unconsidered nuance within net zero scepticism.
- Locals who oppose the net zero target are still more likely to support than oppose clean energy investment in their area.

One of the principal sources of conflict in debates around clean energy and sustainability more broadly is net zero. The UK government's target to reduce the country's greenhouse gas emissions to net zero by 2050 can be contentious and tends to be viewed with scepticism by a significant minority of the public. This holds true in Yorkshire and the Humber, where net zero is substantially less popular than clean energy more broadly. While two-thirds of Yorkshire and the Humber residents feel positive about renewable energy sources, only 41 per cent support the government's net zero target. It's not that people in the area are drastically against the net zero target – they are almost twice as likely to support it as to oppose it (41 per cent to 23 per cent) – but it is visibly less popular than renewables.

In focus group conversations, it's clear that while many people in the region support the transition to clean energy in general, some oppose being made to do so on the grounds of meeting what they consider an arbitrarily decided timeframe. They equally tend to believe that the clean energy transition should not come at the expense of existing energy sources like North Sea oil. Despite being almost exactly in line with the national picture in positive sentiment around renewables, Yorkshire and the Humber residents (41 per cent) are ten percentage points less likely to support the government's net zero targets than Britons as a whole (51 per cent).

GRAPH 10 Yorkshire and the Humber matches the nation on renewables but lags on net zero support

Overall, how do you feel about renewable energy sources such as wind and solar? To what extent do you support or oppose the UK Government's target of reaching net zero by 2050?



I think that we should move slowly towards renewables, but I think we should sort the mess out with the energy we've been using for the last few years first before switching over.

Tilly, Brigg, Retired

Those in Yorkshire and the Humber who are opposed to the government's net zero target are evenly split as to whether they feel positive or negative about clean energy more broadly – 40 per cent feel positive while 39 per cent feel negative. In comparison, 32 per cent of those opposed to the government's net zero targets nationally feel positive towards clean energy and 42 per cent view it negatively. In focus group conversations it's clear that exposure to the Humber's already burgeoning clean energy sector is driving positivity towards clean energy technologies more generally.

People in Yorkshire and the Humber who oppose the government's net zero targets are also narrowly supportive of the government investing in clean energy generation and infrastructure in their area. 32 per cent say it would be a good thing compared to 28 per cent of them who say it would be a bad thing. While not emphatic, this does demonstrate that narratives that are often presented as binaries tend to contain much more nuance.

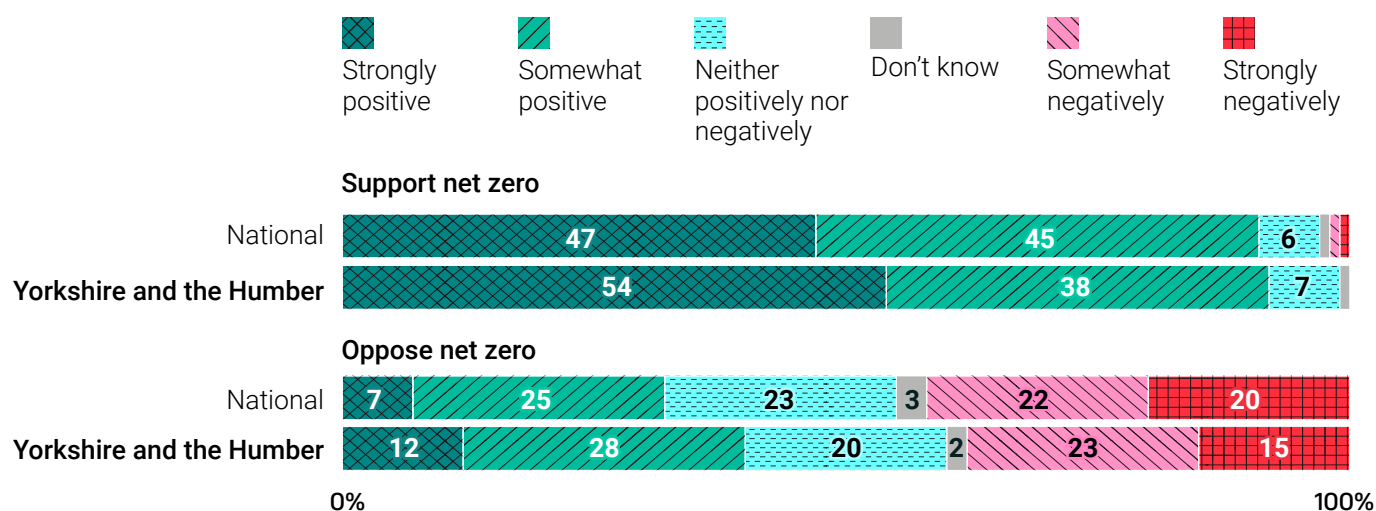


Net zero and clean energy are totally different things. Handicapping ourselves by driving to be net zero by a timescale is the problem. I'd love for us to get there eventually.

Giles, Food Purchasing, Beverley

GRAPH 11 Net zero sceptics in Yorkshire and the Humber are more likely to feel positively about renewable energy sources than net zero sceptics nationally

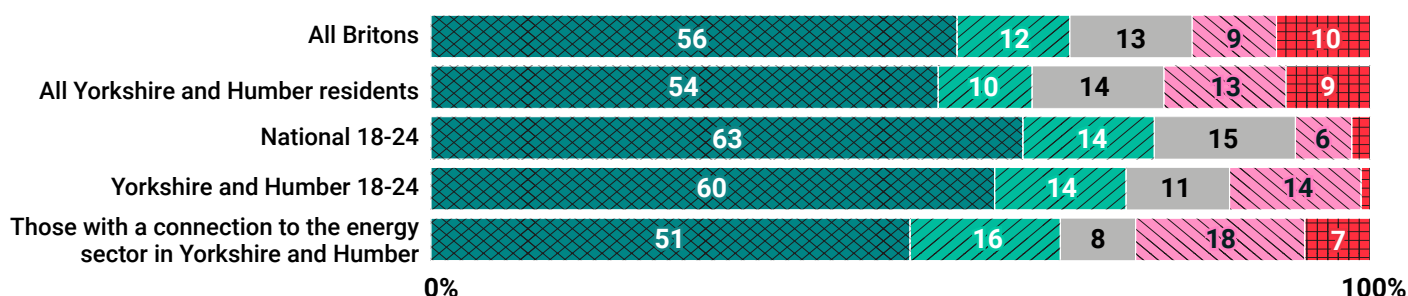
Overall, how do you feel about renewable energy sources such as wind and solar?



GRAPH 12 Young people in Yorkshire and the Humber are twice as likely as young people nationally to be opposed to renewable investment generally but support it in their area

Thinking about the potential for investment in renewable energy in both the country and your local area, which of the following best describes your view?

-  I support Britain investing more in renewable energy generation **in both the country and my local area**
-  I support Britain investing more in renewable energy generation **across the country but not my local area**
-  Don't know
-  I don't think Britain should be investing more in renewable energy generation as a whole, **but I would support investment into my local area**
-  I would not support Britain investing more in renewable energy generation as a whole, **nor would I support investment into my local area**



In focus groups, this sense of practicality came through strongly. Participants were clear that even if they held concerns over net zero, they also took a pragmatic approach to investment in the region and were keen to unlock more of it, regardless of what sector it would be directed towards. Indeed, they responded extremely negatively to hypothetical policy stances which suggested cutting back on investment into renewables in the region on the grounds of affordability.

I think if he [Luke Campbell] thinks people are going to benefit and there's going to be jobs brought to the area, then he's going to go for that, isn't he?... If you're putting an investment into something, then you're going to end up reaping the benefits at some point. And if that's Yorkshire and the Humber rather than London, that's great.

Jenna, Healthcare, Scunthorpe

Insights from individuals with experience of the energy sector

Key takeaways:

- Yorkshire and the Humber residents who have a connection to the energy sector feel especially positively about clean energy.
- 54 per cent are confident investment in clean energy projects would deliver long lasting benefits to the area compared with 39 per cent of the region's wider population.
- This suggests proximity to the energy sector increases positivity towards clean energy.

The regional Yorkshire and the Humber survey included 240 respondents who either work in the energy sector, previously worked in the energy sector, or have a family member or close friend who currently does. Their responses revealed that familiarity breeds warmth, not contempt towards clean energy.

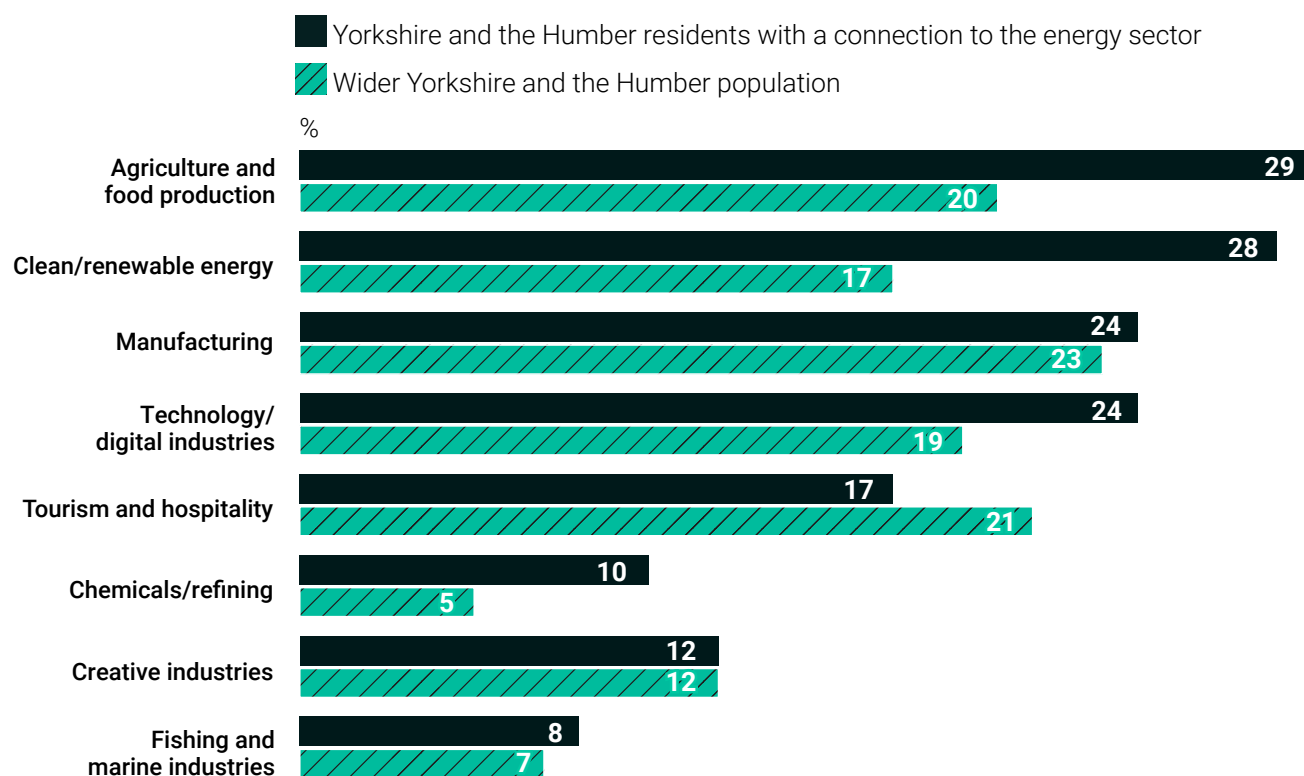
Those with an energy connection are more supportive of the government's net zero target (57 per cent vs 41 per cent of the rest of the region). They are 14 percentage points more likely to consider both the energy industry to be important to their local area's identity and important to their local area's economy. Additionally, 54 per cent think investment in clean energy projects would deliver long lasting benefits compared with 39 per cent of the region's wider population. They are significantly more likely than others in the region to think that Yorkshire and the Humber is particularly well-placed to develop a best-in-class clean energy sector.

The positivity displayed by this group demonstrates that there is an existing, dedicated, knowledgeable and willing workforce in the region who value the role the sector has played in supporting the development of both themselves personally, and their broader communities. Their greater knowledge and understanding of clean energy sources appears to be driving forthright support for the transition.

Economic analysis estimates the Humber Hydrogen project could potentially reduce emissions by 5.4 million tonnes of carbon dioxide per year.

GRAPH 13 Yorkshire and the Humber residents with a connection to the energy sector are more likely to see the potential for clean energy in their area

Which of the following economic sectors/industries do you think your region is best-placed to develop, compared to the rest of the country?





Chapter 3

Humber Hydrogen

Key takeaways:

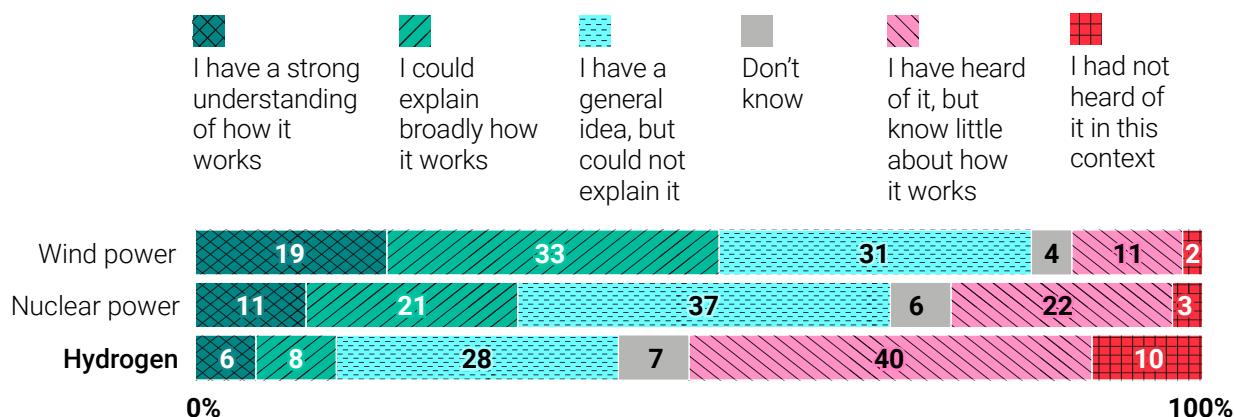
- Just 15 per cent of Yorkshire and the Humber residents could either broadly explain how hydrogen works or have a strong understanding of how it works.
- However, locals support government investment to develop hydrogen transport infrastructure in their region at a nearly four to one ratio (38 per cent vs 10 per cent).
- When given additional details as to the specifics of the Humber Hydrogen project, support rises further – 47 per cent say the development of the Humber Hydrogen project would be a good thing for their community.

Both regionally and nationally, the public currently knows little about hydrogen. Just 15 per cent of Yorkshire and the Humber residents could either broadly explain how hydrogen works or have a strong understanding of how it works. That's compared to 52 per cent who say the same for wind power. The numbers are roughly the same nationally (17 and 54 per cent).

However, a lack of understanding as to precisely what hydrogen is or how it works in an energy context does not deter Yorkshire and the Humber residents from supporting investment into hydrogen infrastructure in the region. Residents support the government investing money to help develop the infrastructure needed to generate and transport hydrogen in their region at a nearly four to one ratio – 38 per cent support vs 10 per cent opposition. Again, there is a practicality that came through in focus group conversations where participants felt their area is in dire need of some form of investment with many not particularly concerned exactly what that investment medium is, so long as it can help turn the region around.

GRAPH 14 Hydrogen remains far less understood than wind or nuclear power among locals in Yorkshire and the Humber

Before today, how familiar, if at all, were you with how each of the following is used to produce or supply energy?



When given additional details as to the specifics of the Humber Hydrogen project, support rises further, with 47 per cent saying the development of the Humber Hydrogen network would be a good thing for their community. Young people are especially supportive of the project, with a majority of under-35s saying Humber Hydrogen will be a good thing (52 per cent of 18-24 year-olds; 64 per cent of 25-34 year-olds). Yorkshire and the Humber residents are also supportive of the government investing funds to help unlock Humber Hydrogen – when presented with information about the project, 50 per cent say they would support the government investing £500 million to help support its development with just 11 per cent saying they would oppose this.

50 per cent say they would support the government investing £500 million to help support development of Humber Hydrogen with just 11 per cent saying they would oppose this.

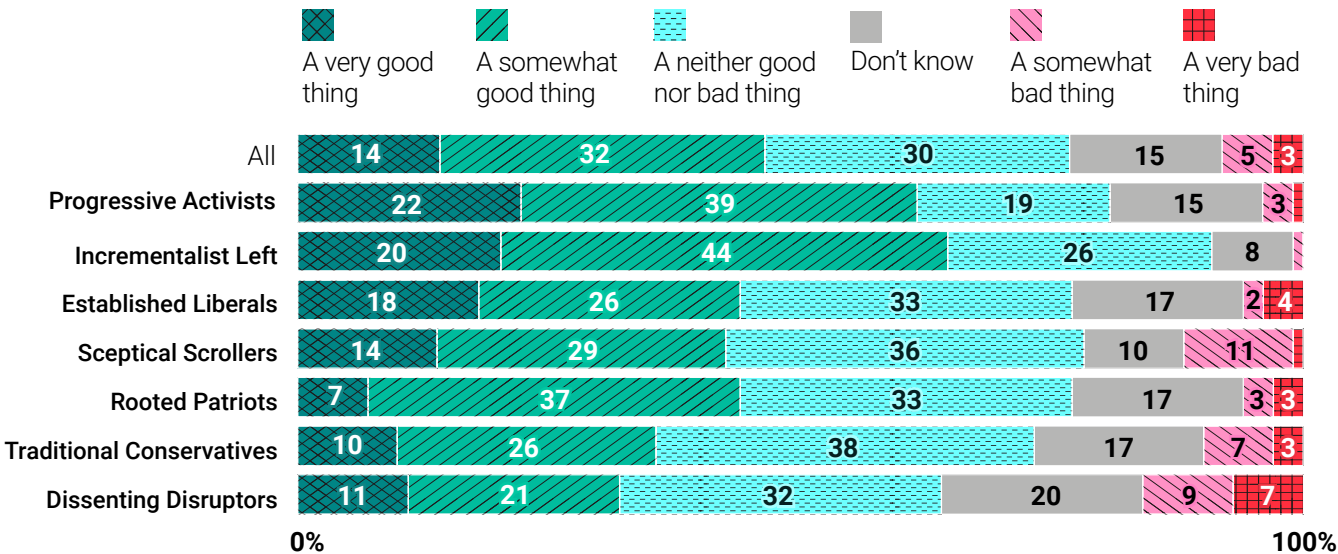


I think it would be a good investment... apparently hydrogen is meant to be the future, better than solar panels and that sort of thing, then you're obviously going to attract more people to the area. And with more people in the area, obviously then causes your high streets and everything to thrive and obviously the revenues in your local areas go up...The only problem would be if you make it the hub and then you just import all your labour.

Cian, Accountant (Food Manufacturer)

GRAPH 15 All segments in Yorkshire and the Humber are at least twice as likely to say Humber Hydrogen would be good for their community than bad

Do you think the development of the Humber Hydrogen network would be a good or bad thing for your community?



The principal reason people in the region support the project is the same as the reason they think that the area is in decline: jobs. When presented with two narratives around the project, one detailing its sustainability benefits and another detailing its employment and economic benefits, seeing the jobs-oriented message drove a larger uptick in support than seeing the message focused on the scheme's sustainability benefits.

While underlying concerns about the government's ability to manage and deliver large infrastructure projects did lead to some focus group participants questioning whether the investment in the scheme would be effective, informing them that this would be a public-private partnership with significant amounts of private investment being delivered alongside public investment did significantly allay their concerns.

Oh, definitely I'd want it to be in our area rather than the Northwest, no doubt about that because it would benefit us all, wouldn't it, if that's in our area.

Sarah, Cabin Crew, Howden.

If it's got that level of private funding, there will be a massive push to make sure this doesn't go the way of HS2. It won't be allowed to. Massive companies like that will just not allow this to fail.

Jack - Goole, Retired, Former Glassmaker

Economic analysis estimates that Humber Hydrogen could create more than **54,000 jobs during construction and up to 900 permanent jobs once operational**, as well as safeguarding up to 4,000 jobs in critical industries like steel and chemicals.

Chapter 4

Conclusion

Humber residents want change and see clean energy as a path to achieving it

There is a profound desire for change in Yorkshire and the Humber. The sense of continued regional decline has left many locals fearing for the future of their area, and above all for the economic prospects of its young people.

After the region's core industry was hollowed out in the second half of the last century, residents are keen for a new one to take its place and revitalise the area. They see clean energy investment as a plausible and positive way of achieving this.

Indeed, their primary motivation for supporting investment into clean energy and Humber Hydrogen is not the environmental benefits it could bring but rather the jobs and economic benefits they believe it can unlock. This is particularly the case for younger generations in the region who are even more concerned about the shortages of good jobs in their local communities. Crucially, the residents of Yorkshire and the Humber believe clean energy investment would benefit local people rather than outside interests and deliver lasting benefits - positivity that is hard to find when public faith in institutions and the direction of Britain's economy is as low as it currently is.

Support for investment into clean energy in the Humber goes beyond usual climate divides

The extent to which those who are more sceptical of the government's net zero target nonetheless back investment into clean energy sources should give pause to simplistic narratives about how they want their representatives to approach the climate transition. Indeed, it is overwhelmingly clear that most want their representatives to prioritise economic pragmatism over ideology.

The strong enthusiasm shown by those in the region with a connection to the energy industry shows that proximity to the sector strengthens rather than dampens support for investment into sources of clean energy. The Humber has an experienced workforce and it is ready and willing to embrace new sources of clean energy like hydrogen.

Politicians who fail to deliver this investment risk deepening mistrust

Presented with information about Humber Hydrogen, residents strongly back government investment to help unlock it. It is their hope for their region to become a powerhouse once more, for it to be defined by its future not just by a political economy of the past that drives this support. Policymakers should therefore be cautious of failing to deliver on promises to invest in the development of clean energy sources in regions like the Humber, particularly if they lack an alternative plan for restoring economic prosperity. Doing so could risk reinforcing residents' worst suspicions about those in power.

For many residents, Humber Hydrogen represents more than just energy infrastructure. It is seen as an opportunity to unlock jobs, investment and long-term prosperity for the region. The Humber's industrial heritage, skilled workforce and strategic assets mean many believe it is well placed to play a leading role in the UK's future energy system. The findings suggest there is a strong appetite for investment that helps the region build on its strengths and create opportunities for future generations.

Methodology

Polling

This research consisted of two polls and three focus groups. The first poll was conducted among residents of Yorkshire and the Humber, with a sample size of 1,552, including 240 Yorkshire and the Humber residents who had a connection to the energy sector. Fieldwork for this poll took place between 04-18 August 2026. This poll was weighted according to figures based on Census 2021 data (ONS) for the Yorkshire and The Humber region, among all usual residents aged 18+. Respondents were weighted to be representative of Yorkshire and the Humber according to age and gender interlocked, ethnicity, education level and 2024 General Election vote.

Respondents were considered to have an 'energy connection' if they currently work in the energy sector, previously worked in the energy sector, or have a close relationship with someone who works in the energy sector.

The second poll was nationally representative of Great Britain, with a sample size of 2,010. Fieldwork for this poll took place between 14-17 August 2026. This poll was weighted according to age/sex interlocked, region, 2024 General Election vote, ethnicity, and education level.

Focus Groups

Three focus groups were conducted in Yorkshire and the Humber area across two rounds. The first group consisted exclusively of participants who worked in or had previously worked in the energy or manufacturing industries, with a preference for heavy or energy-intensive industries. Participants were drawn from the following constituencies: Scunthorpe, Grimsby and Cleethorpes, Kingston Upon Hull East, Kingston Upon Hull North and Cottingham. This group took place on 30 July 2026.

The second group consisted of people drawn from: Kingston upon Hull East, Kingston upon Hull North and Cottingham, Kingston upon Hull West and Haltemprice, and Scunthorpe. Participants all voted Labour in the 2024 General Election but had either switched to planning to vote Reform UK or were considering voting Reform UK. This group took place on 27 August 2026.

The third group consisted of people drawn from: Brigg and Immingham, Beverley and Holderness, and Goole and Pocklington (specifically the town of Goole). Participants all voted Conservative in the 2024 General Election but had either switched to planning to Reform UK or were considering voting Reform UK. This group also took place on 27 August 2026. The second and third groups each aimed to include two or three participants who had a personal connection to the energy sector, whether through their own current or past work, or through a close friend or family member.



The logo icon for Humber Hydrogen features two intersecting white arcs forming a stylized 'X' shape. A small teal dot is positioned on the upper-left arc, and a small blue dot is on the lower-right arc.

HUMBER HYDROGEN

