

CLIMATE *Policy & Strategy*

Climate Policy & Strategy: United Kingdom
Tracking survey, June 2022



What this is based on

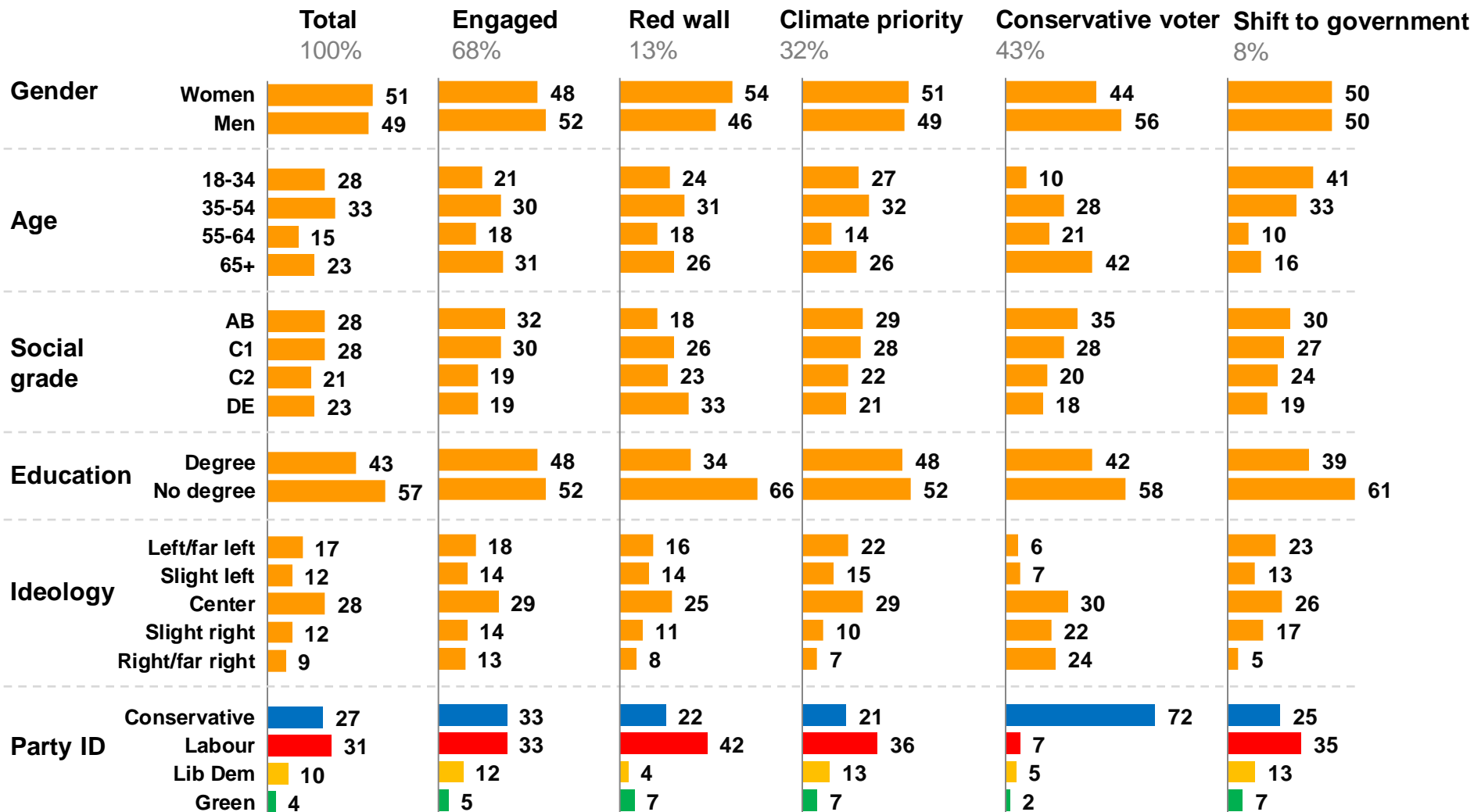
Our poll

- N=2,000 nationally representative survey of the United Kingdom
- Fieldwork: 3-9 June 2022
- Online, 20-minute questionnaire
- Weighted to national statistics on gender, age, region, education, social grade, ethnicity, and past voting behaviour

Groups analysed

Target group	Definition
Total	All respondents – represents national 18+ population of the United Kingdom
Engaged	Those very likely to vote in elections (8-10/10)
Climate priority	Chose climate as a top priority for government
Red Wall	Lives in the Midlands or North of England, in a town or rural area, and identifies as working class
Conservative voters	Voted Conservative in 2019 election
Johnson shifters	Initially answer disapprove or don't know on government's handling of climate & energy transition, but after balanced positioning, approve
Pro Climate CEOs	Cool/negative/neutral/undecided to 'CEOs of major companies' but warm/positive to 'CEOs of major companies who say climate change is a crisis and companies must change the way they do business'

Targets: political



What you need to know

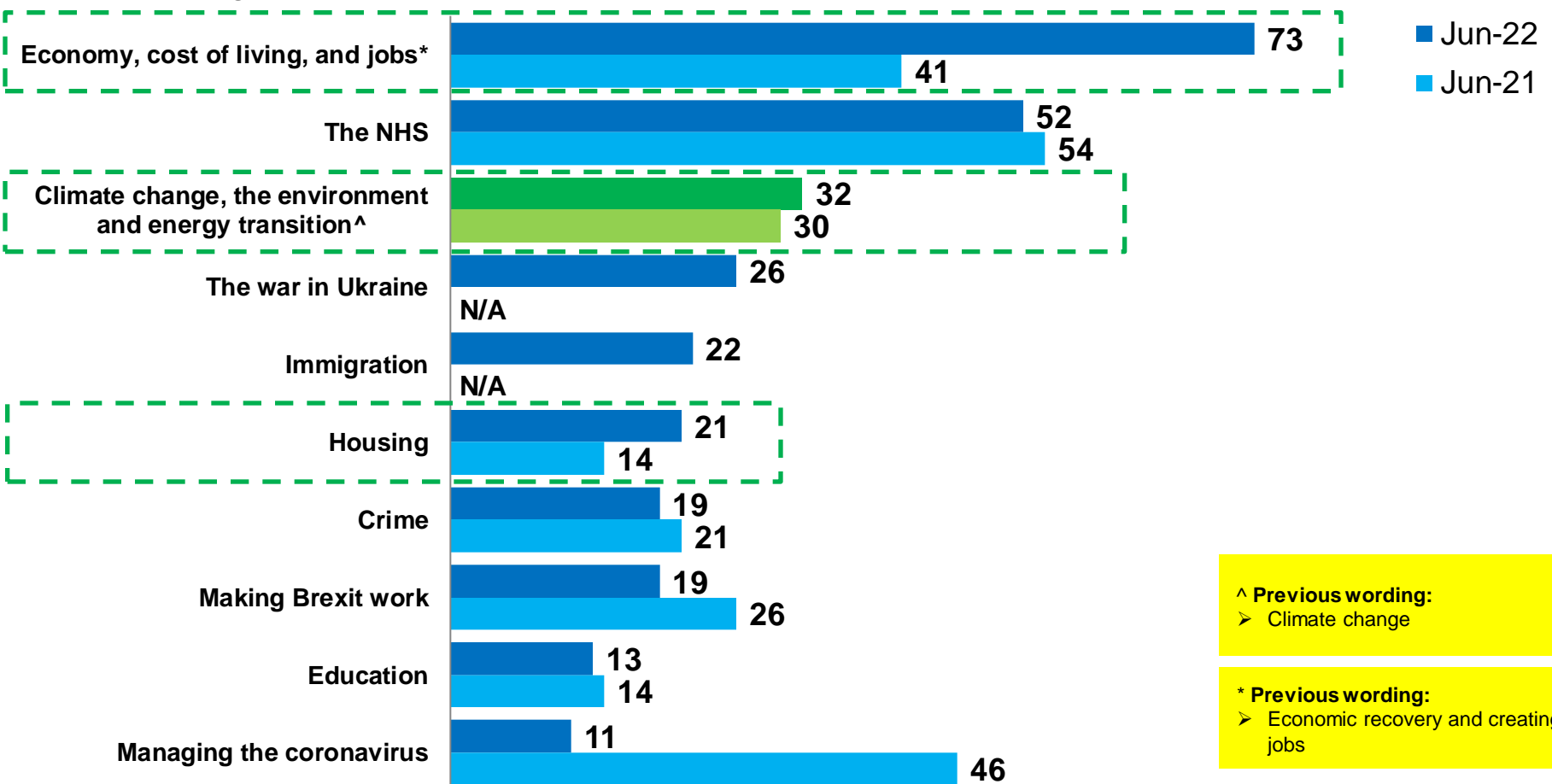
- Inflation and the energy crisis has flipped the mood in Britain, with strong majorities negative about the country's direction, the economy and their own finances. The cost of living is a dominant issue, far outranking the usually paramount NHS. However, concern about climate, the environment and energy transition has risen slightly, and is now higher than immigration, housing, crime, Brexit or education.
- The dominant component in concerns about the cost of living is energy bills, followed by food and fuel. People are aware of high global oil and gas prices, and effects of the Ukraine war, but just as many also think profiteering is to blame, particularly in the Red Wall.
- A big intense majority say major action is needed on climate change, despite highlighting the cost, during a cost-of-living crisis, including Conservatives. The public believes the current energy mix an expensive option.
- The Prime Minister had suffered a 27-point drop in net job approval. He has also lost ground on handling the economy and climate. The reasons for disapproval on climate: people don't think the government is acting with the required urgency.
- Government plans and messages on climate and energy boost Johnson's approval rating in these areas, but so far the bold policies tested here are not really delivered.
- A small majority supports new oil and gas projects in the North Sea to replace Russian imports and to increase production to help consumers, particularly in the Red Wall. But without mention of Russia, only a plurality supported going forward in the face of climate worries.
- Cost of living, energy and climate has produced dramatic shifts in public priorities. They want the oil companies to accelerate investment in the the shift to renewables, to lower cost, and the government to pursue an industrial policy that favors low-carbon technology, solar, wind and green hydrogen. That includes Conservatives.
- In the transition, there is strong and intense support, rank-ordered, for solar, and off and on-shore wind; there are also large majorities for oil and gas from Norway and from the North Sea.
- Relief on energy bills, paid for with the government's windfall tax, is its most popular cost-of-living policy.
- Patriotic messages on energy independence help with Johnson's standing. Labour stands out with a windfall tax, attacking government for protecting big companies and failing to insulate to reduce household costs.
- Right-wing opposition messages skeptical on climate change get little traction. Among conservatives below windfall.
- Corporate CEOs major gain in reputation from saying climate change is a crisis requiring new business models.

Climate Context



Concern with economy, cost of living and housing surge at the expense of all issues, except climate change

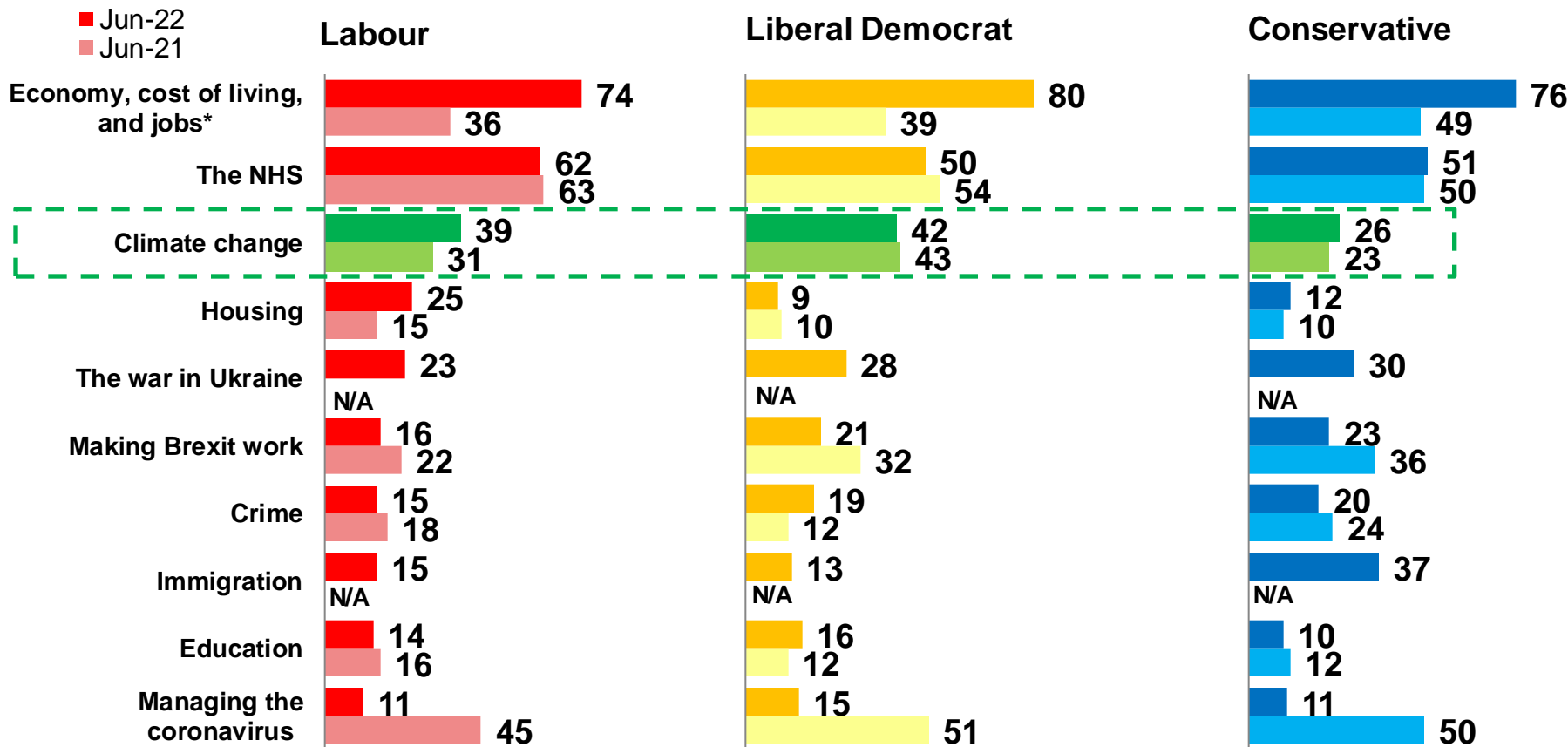
Priorities for government, total sample



What are the *THREE* issues you think should be the top priorities for government?

Concern with climate change grows with Labour voters, up marginally with Conservatives and maintained at a high level with Liberal Democrats

Priorities for government, by ideology



What are the *THREE* issues you think should be the top priorities for government?

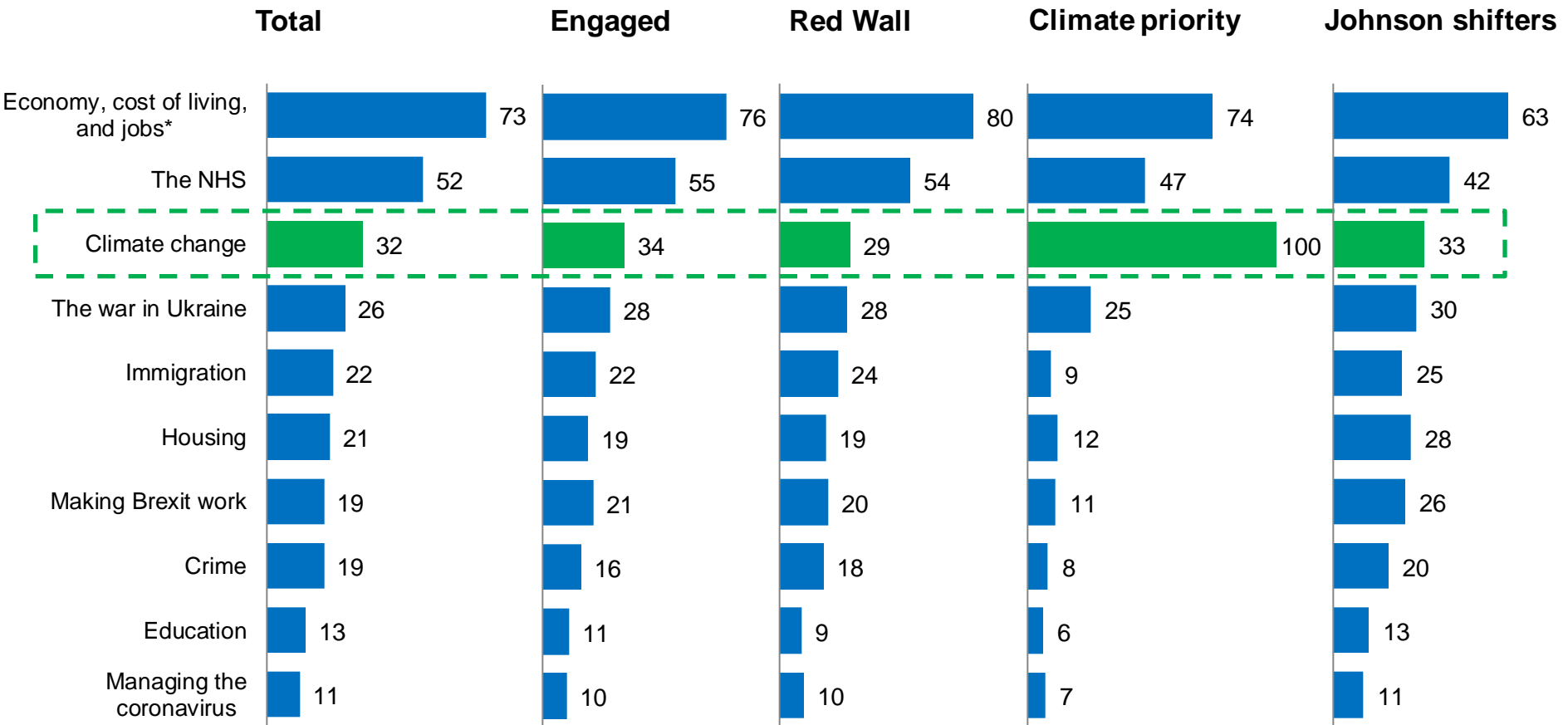
* Previous wording:
➤ Economic recovery and creating jobs

Wave 2, 2019 vote: Labour, n=433; Conservative, n=584; Liberal Democrat, n=153

Wave 1, 2019 vote: Labour, n=449; Conservative, n=674; Liberal Democrat, n=158

Climate change prioritized after economy & cost-of-living and NHS in all targets, including Red Wall

Priorities for government, by target



What are the *THREE* issues you think should be the top priorities for government?

* Previous wording:
➤ Economic recovery and creating jobs

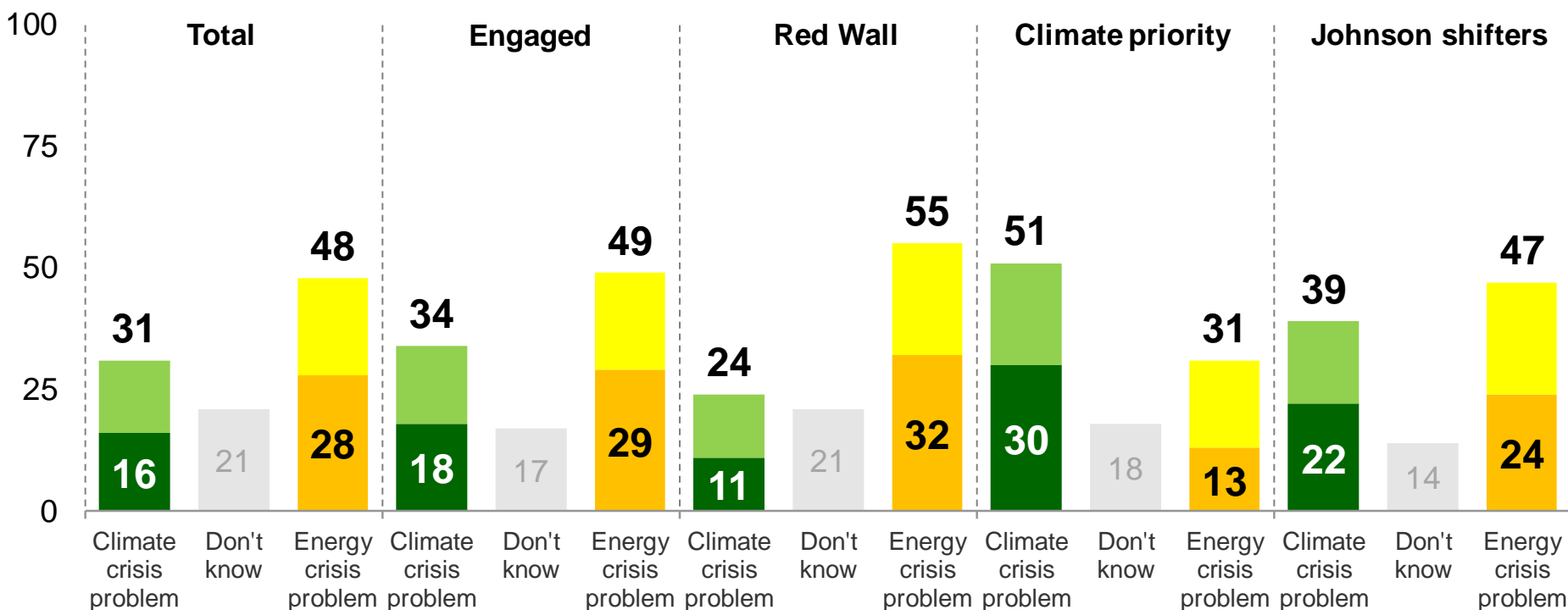
Total sample, n=2,000; Engaged, n=1,358; Red Wall, n=263; Climate priority, n=646; Johnson shifters, n=155

Majority of Red Wall voters see “energy crisis” as more fundamental than “climate crisis,” though a fifth not sure

1) The climate crisis is the more fundamental problem.

2) The energy crisis is the more fundamental problem.

■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat ■ Don't know



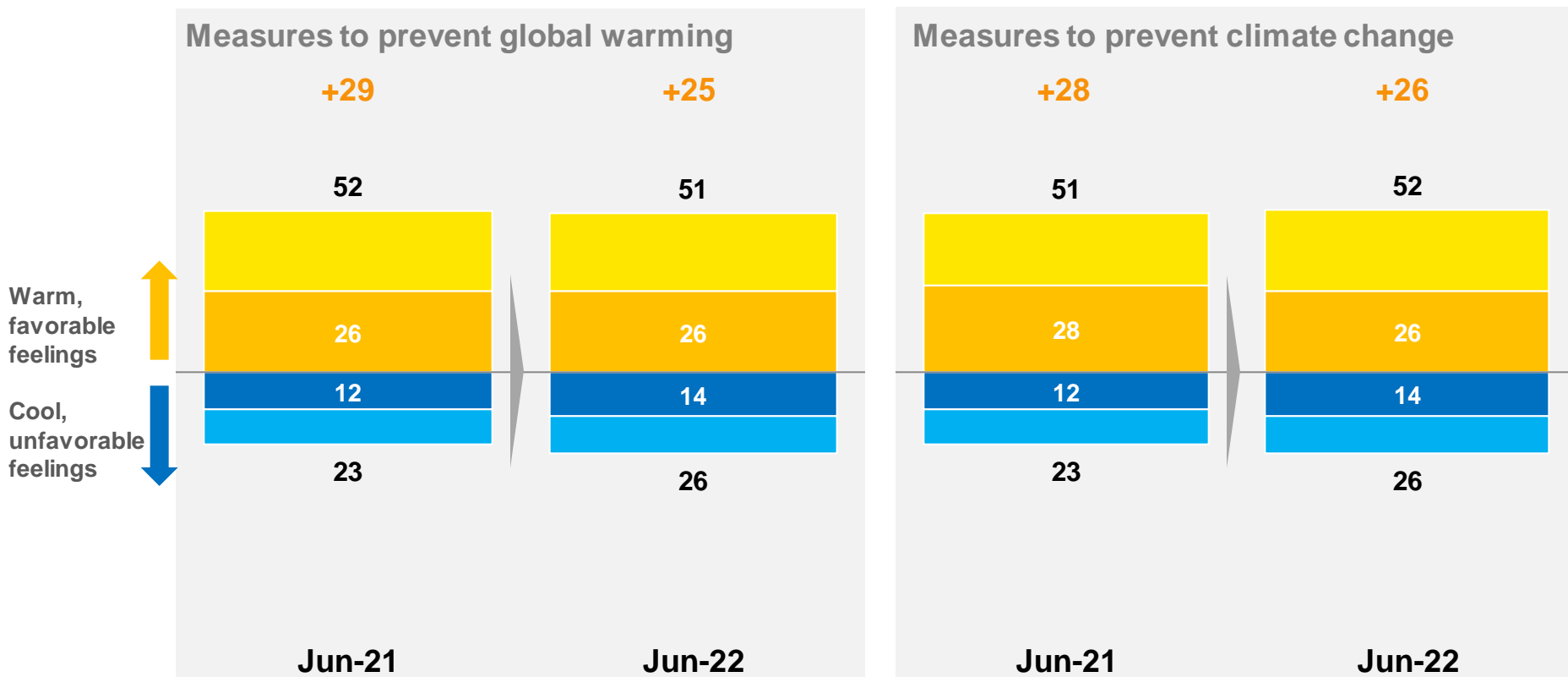
On the following pages are some pairs of statements. For each, please indicate whether the FIRST statement or the SECOND statement comes closer to your views, even if neither is exactly right.

Total sample, n=2,000; Engaged, n=1,358; Red Wall, n=263; Climate priority, n=646; Johnson shifters, n=155

The public by two-to-one majority favors measures to prevent global warming and climate change

Measures to prevent global warming and climate change, total sample

■ Cool (26-49) ■ Warm (51-74)
■ Very cool (0-25) ■ Very warm (75-100)



Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.

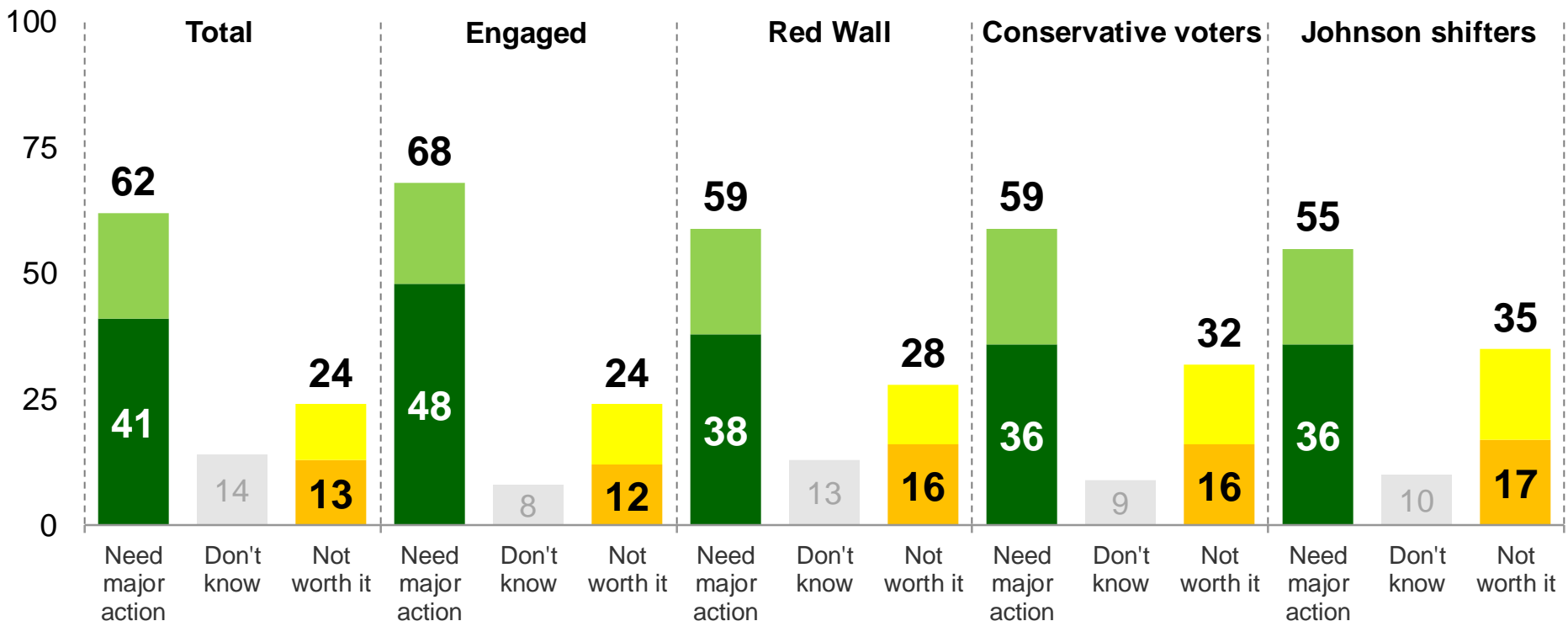
Total sample, n=2,000

Big, intense majorities – including Conservative voters — say we need major action on climate change, despite highlighting the costs of fixing it amid a cost-of-living crisis

1) Climate change is a threat and we need major action to combat it.

2) The threat of climate change is exaggerated and the high cost of fixing it may not be worth it.

■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat ■ Don't know



On the following pages are some pairs of statements. For each, please indicate whether the FIRST statement or the SECOND statement comes closer to your views, even if neither is exactly right.

Total sample, n=2,000; Engaged, n=1,358; Red Wall, n=263; Conservative voters, n=584; Johnson shifters, n=155

Big drop in percentage who think government is implementing climate legislation/investments

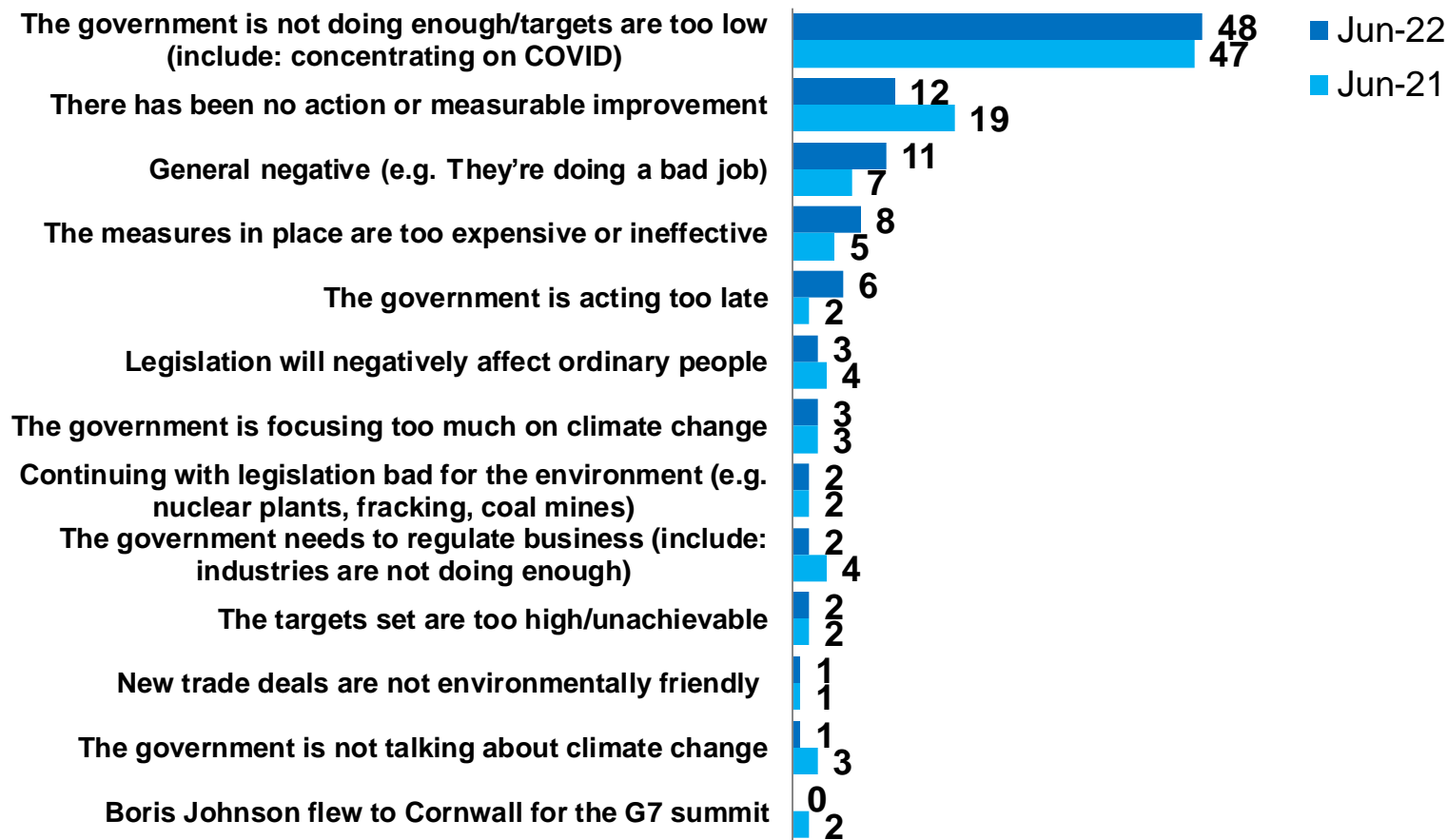
Reasons for approval, those who approve of government handling of climate



Why do you approve of how the government is addressing climate change, the environment and energy transition?

Dominant reason for dissatisfaction on climate remains that government isn't doing enough/ambitious enough

Reasons for disapproval, those who disapprove of government handling of climate



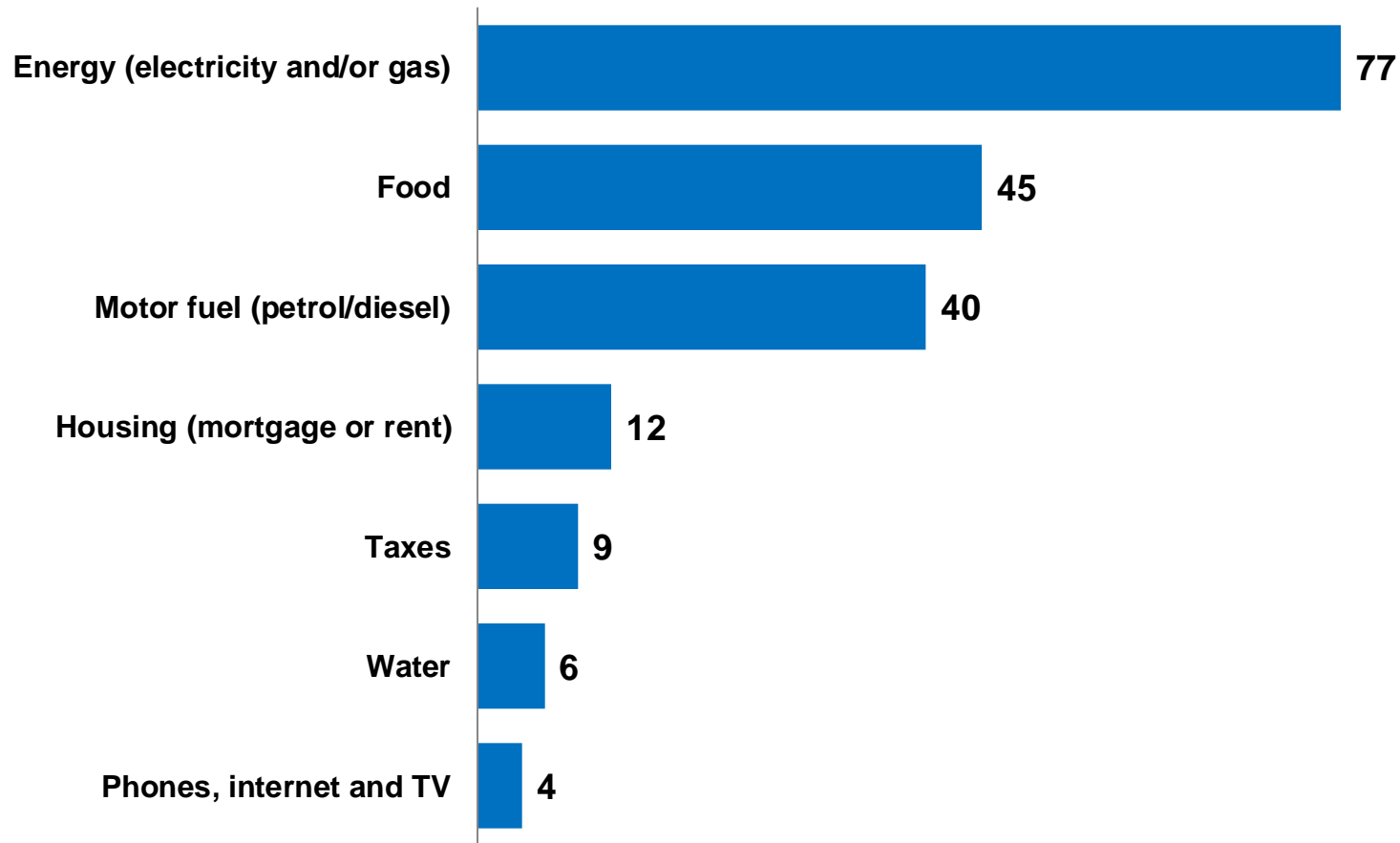
Why do you disapprove of how the government is addressing climate change, the environment and energy transition?

Climate and energy policy



Increased energy bills are the dominant concern around inflation, followed by food and fuel

Biggest concerns over increased costs, total sample

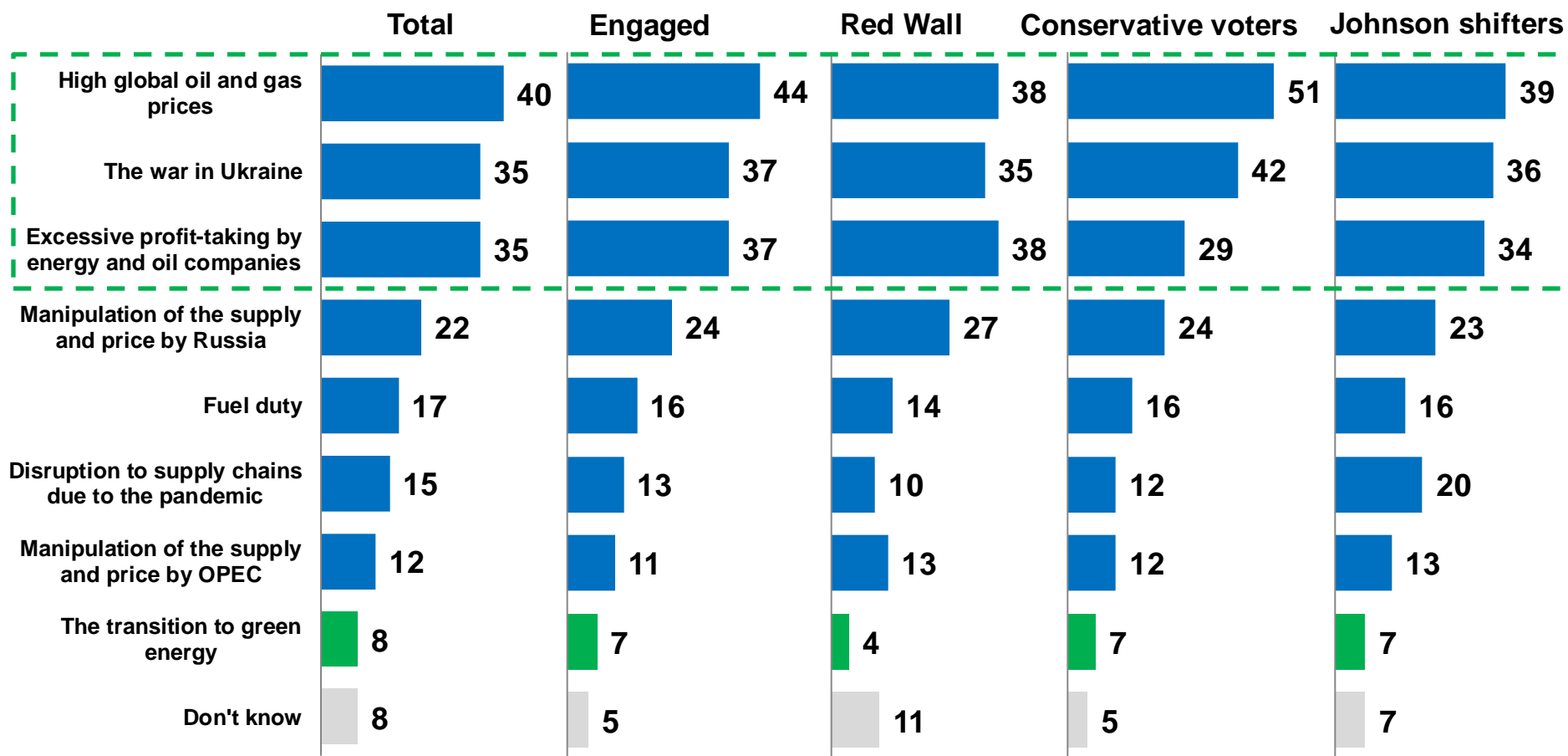


Prices and bills for some everyday goods and services have increased recently. Below are some costs that most households face. Which TWO of these are you MOST concerned about the cost of at the moment?

Total sample, n=2,000

Inflation blamed on global energy prices, but profiteering also seen as a major problem: it is level with Ukraine war & highest in Red Wall

Reasons for increased cost of living, by target

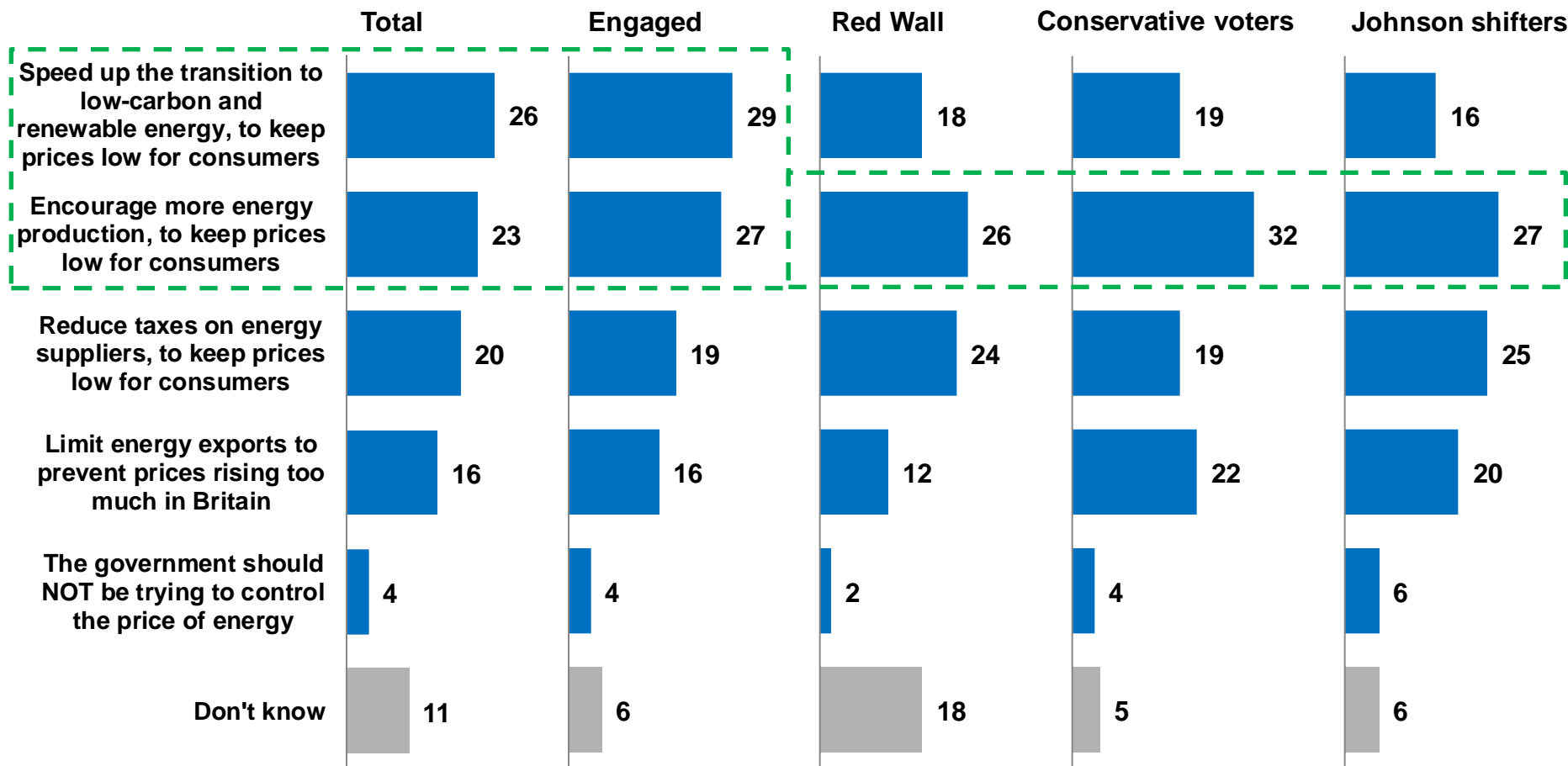


You may have noticed increased prices recently, particularly for energy and food. Why do you think energy prices are high today? Please select the TWO most important reasons from the list below.

Total sample, n=2,000; Engaged, n=1,358; Red Wall, n=263; Conservative voters, n=584; Johnson shifters, n=155

Public want government to speed transition to renewables to lower prices – Red Wall, Conservatives and Shifters want increased energy production

Government measures on energy prices, by target

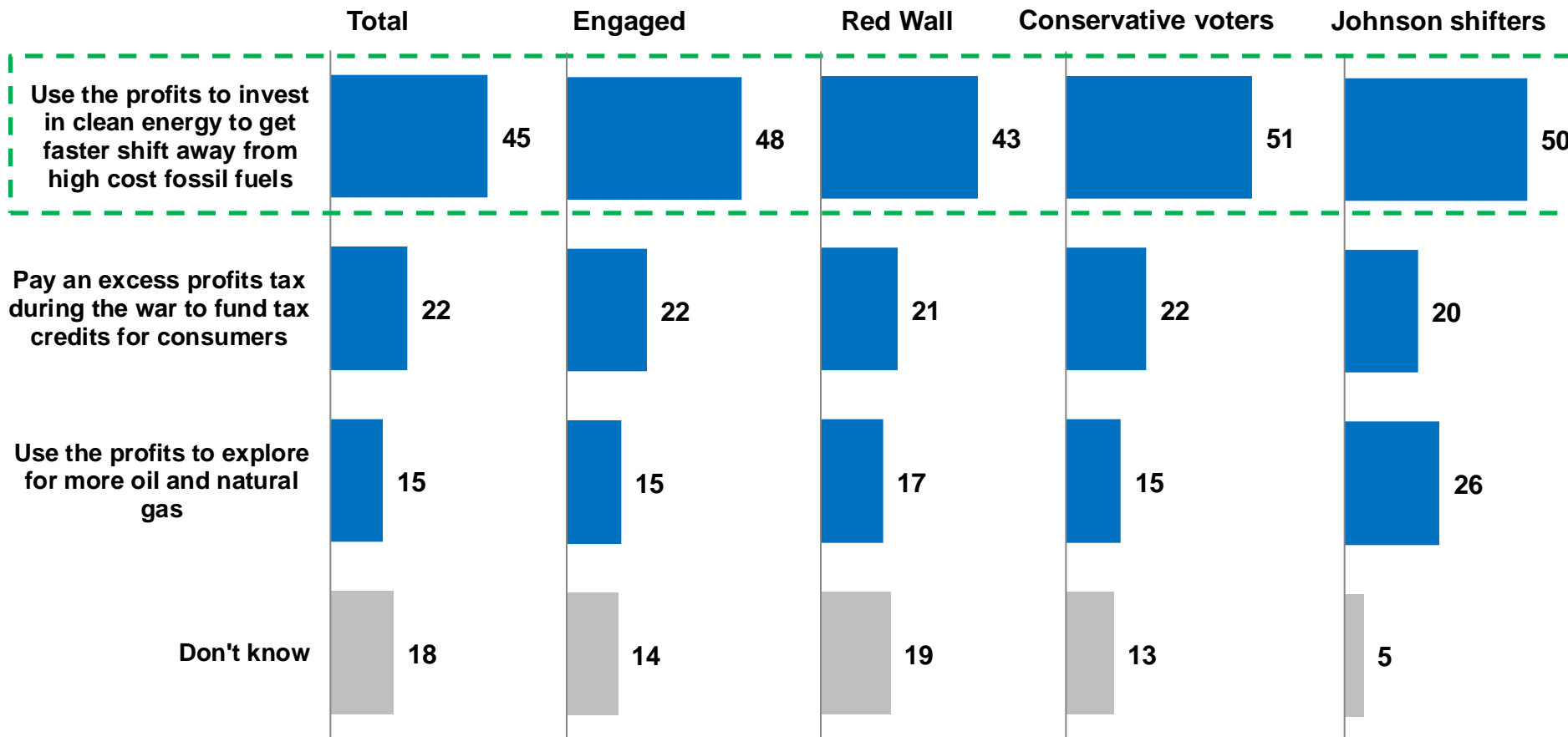


The government may take measures to affect energy prices for consumers. Which of the following statements is closest to YOUR view?

Asked to ½-sample: Total, n=972; Engaged, n=646; Red Wall, n=125; Conservative voters, n=291; Johnson shifters, n=85

Broad agreement that oil profits should be invested in clean energy to expedite transition from fossil fuels – Conservative voters most of all

Approach to oil and energy companies, by target

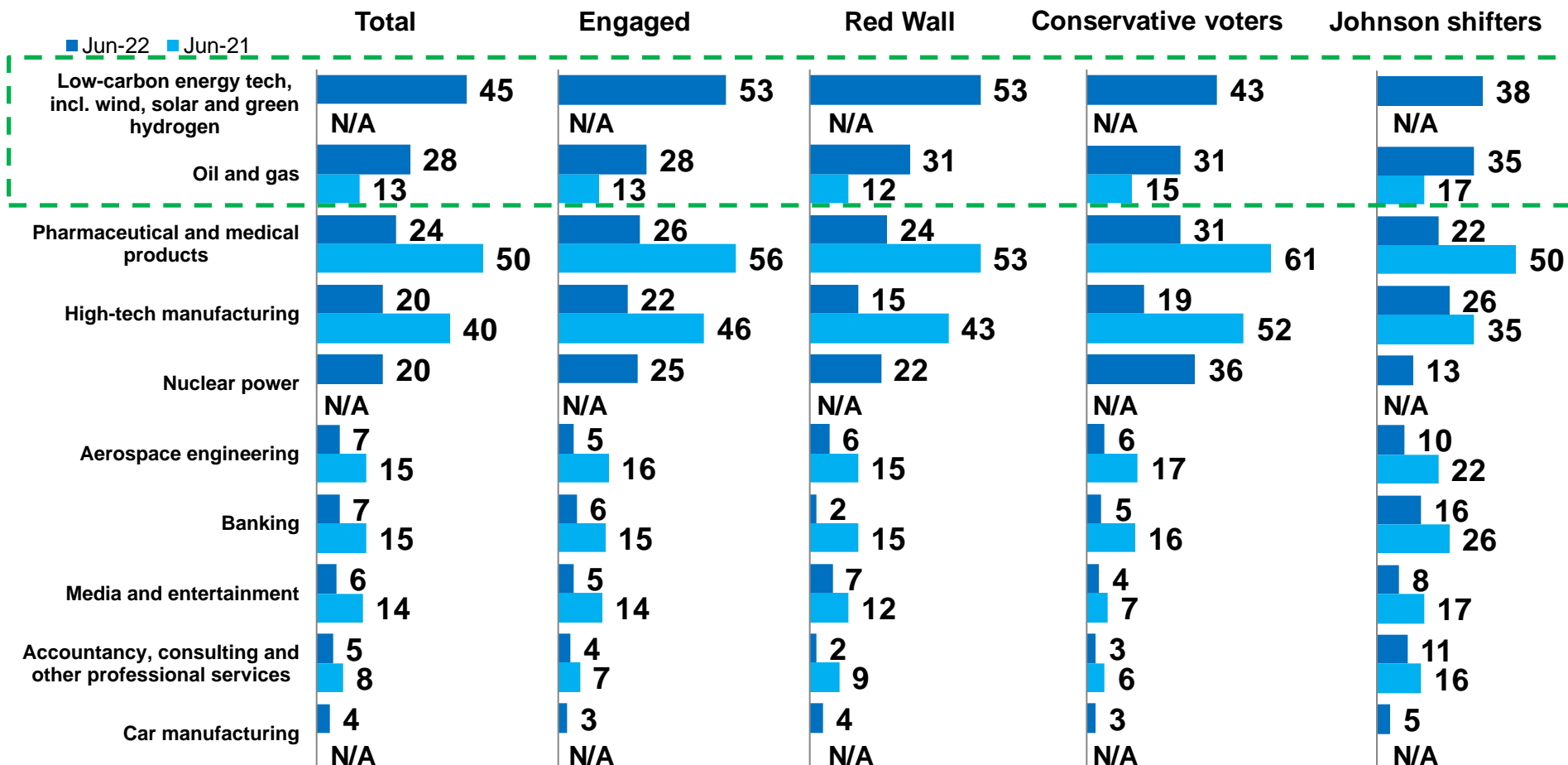


Which ONE is the right approach to oil and energy companies during the energy crisis?

Asked to ½-sample: Total, n=1,028; Engaged, n=713; Red Wall, n=138; Conservative voters, n=293; Johnson shifters, n=70

Public now wants industrial policy where for the first time, the low-carbon energy sector tops the list

Industries that government should support, by target



Which TWO of these industries would you MOST want the government to support and champion?

Total sample, n=2,000; Engaged, n=1,358; Red Wall, n=263; Conservative voters, n=584; Johnson shifters, n=155

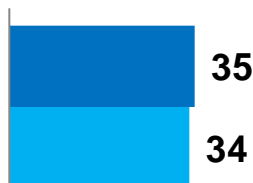
Britons continue to believe energy transition will not mean big increases in the cost of energy

Sensitivity to the cost of an energy transition, by how much bills would rise

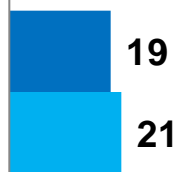
■ Jun-22
■ Jun-21

Bills up 5%

Most changes can be done with renewables and tech that do not require big increases in the cost of energy

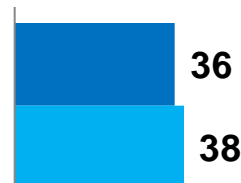


These changes to address climate change could raise energy bills by 5 percent and that would be ok

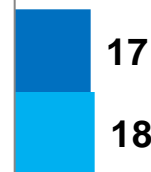


Most changes can be done with renewables and tech that do not require big increases in the cost of energy

Bills up 10%

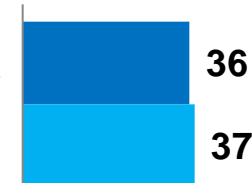


These changes to address climate change could raise energy bills by 10 percent and that would be ok

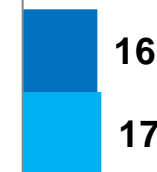


Most changes can be done with renewables and tech that do not require big increases in the cost of energy

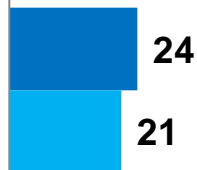
Bills up 15%



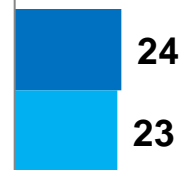
These changes to address climate change could raise energy bills by 15 percent and that would be ok



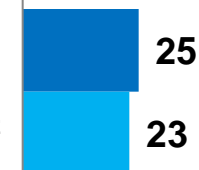
These changes will raise energy costs, and I am against that



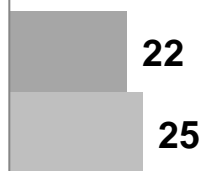
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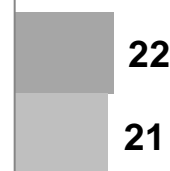
These changes will raise energy costs, and I am against that



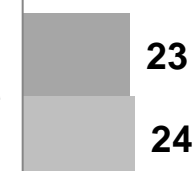
Not sure



Not sure



Not sure



Which ONE of the following is true about the cost of these proposals to address climate change?

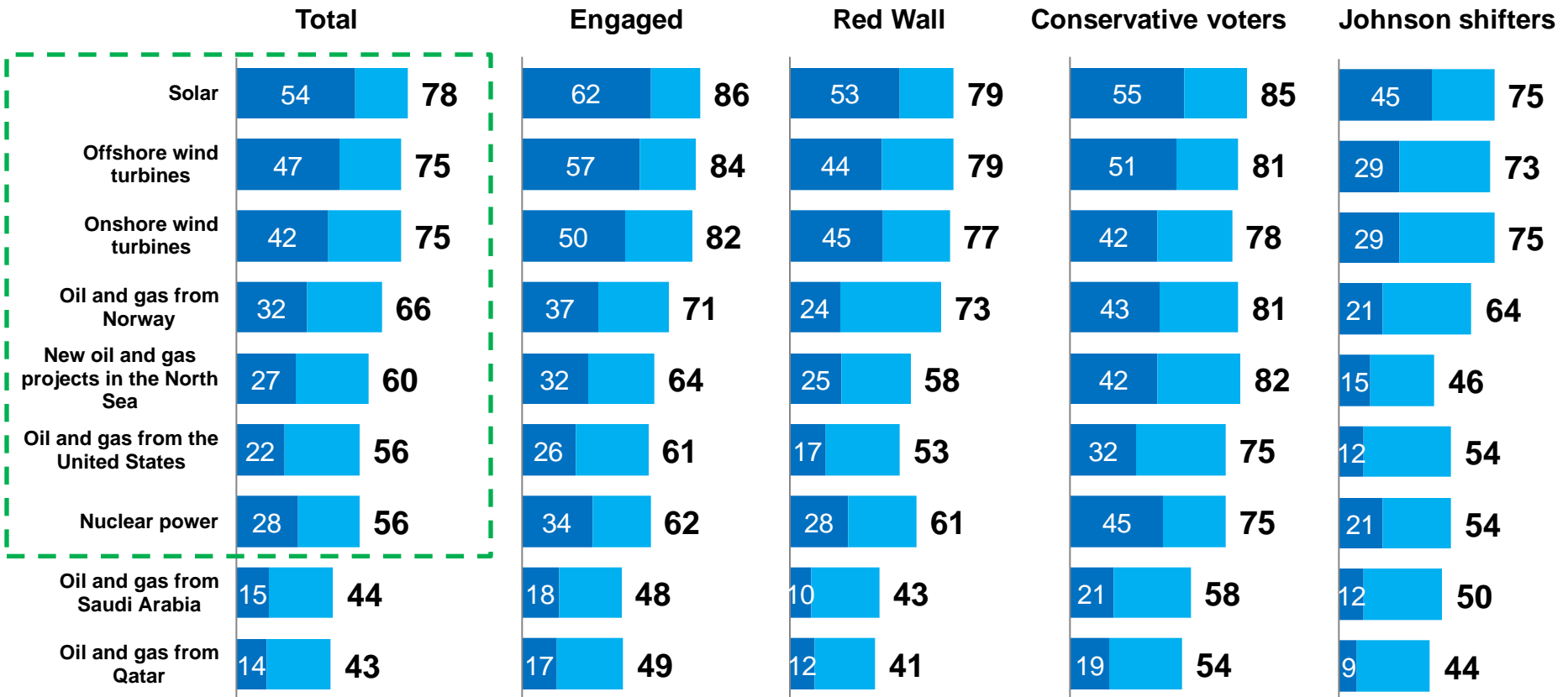
Total, n=2,000; each potential rise in bills shown to 1/3-sample splits

A photograph of an industrial gas processing facility. In the foreground, a blue valve with a red handwheel is prominent. The valve has a yellow label with the number '7' and the word 'ORBIT' is visible on its body. It is connected to a network of yellow pipes. In the background, a long, straight line of similar valves and pipes recedes into the distance, creating a strong sense of perspective. The scene is brightly lit, and the overall color palette is dominated by the yellow of the pipes and the blue of the valve bodies.

Ukraine war and end of Russian energy

To replace Russian energy, Brits overwhelmingly favor renewables and strongly favor oil & gas from Norway and North Sea, particularly Conservative voters

Replacements for Russian oil and gas, by target



In response to Russia's invasion of Ukraine, Britain and other countries are cutting imports of oil and gas from Russia, so we need to get energy from other sources. Do you support or oppose using energy from each of the following to replace Russian oil and gas?

Total sample, n=2,000; Engaged, n=1,358; Red Wall, n=263; Conservative voters, n=584; Johnson shifters, n=155

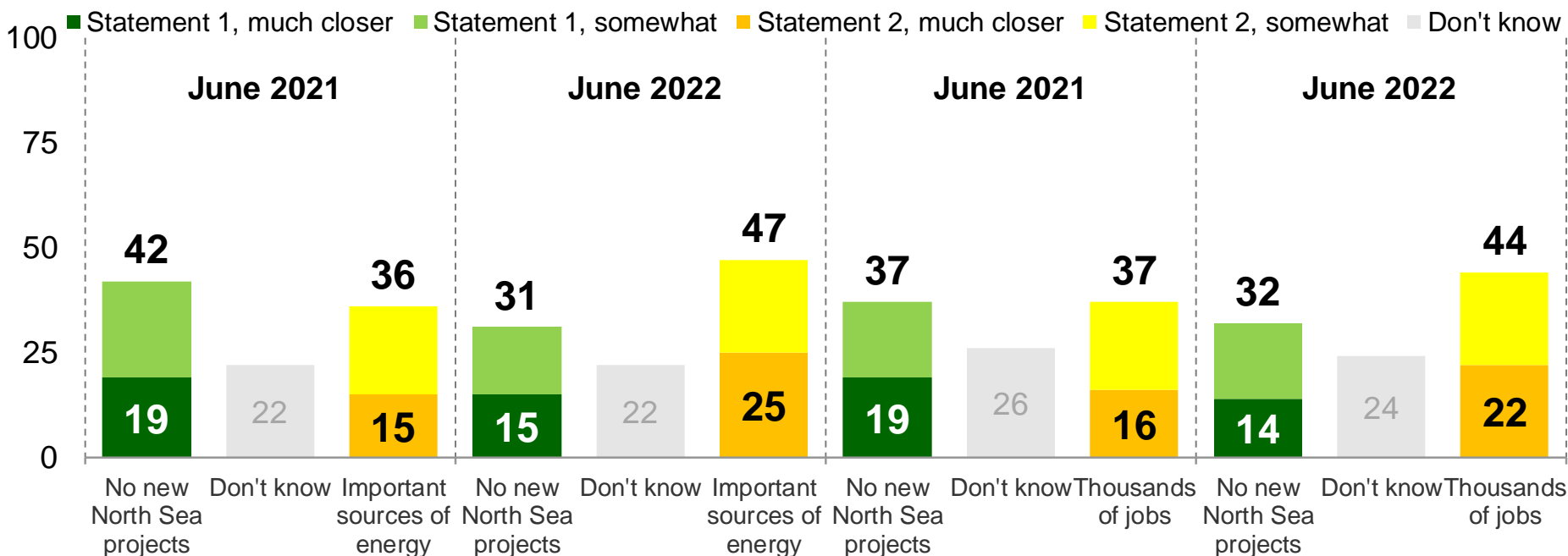
Post-Ukraine, increased appetite for North Sea oil and gas exploration but short of majority – without mentioning Russia

1) The government should not allow any new oil and gas projects to start up in the North Sea, to control the UK's greenhouse gas emissions.

2) Oil and gas will be important sources of energy for years to come, so the government should allow new oil and gas projects in the North Sea.

1) The government should not allow any new oil and gas projects to start up in the North Sea, to control the UK's greenhouse gas emissions.

2) The North Sea oil and gas industry contributes thousands of jobs and billions in taxes to the UK, so the government should allow new oil and gas projects to go ahead.



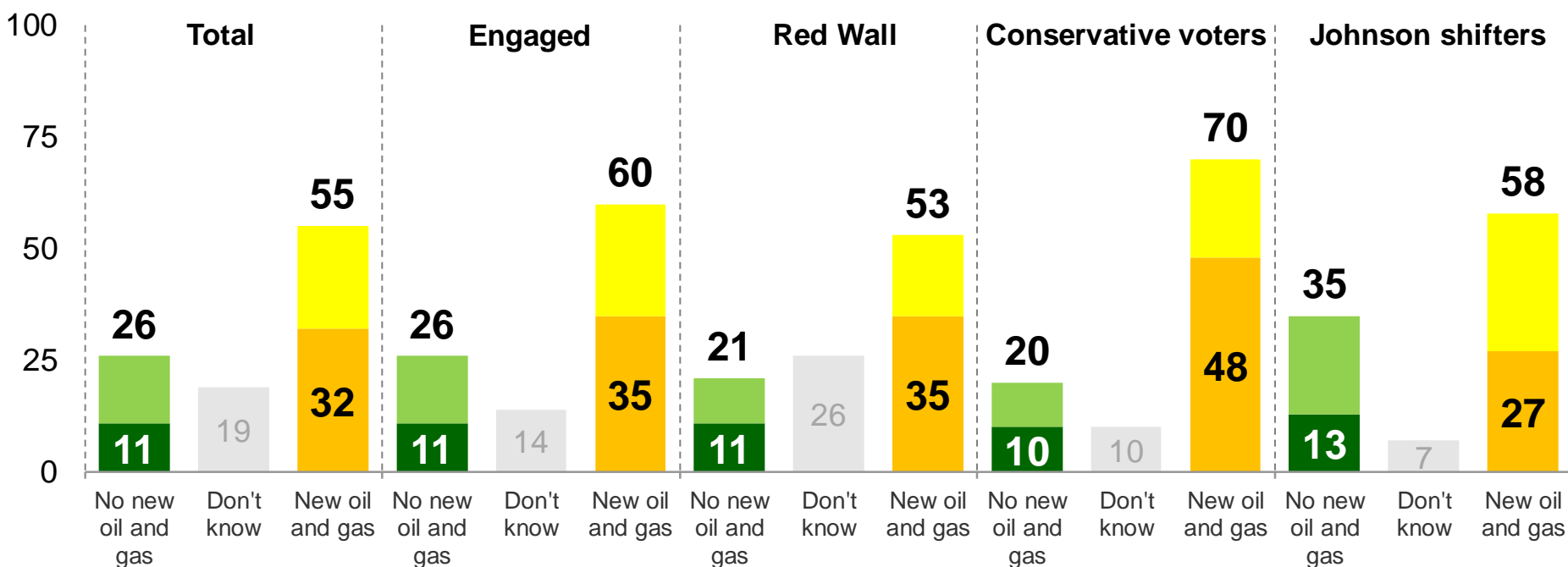
On the following pages are some pairs of statements. For each, please indicate whether the FIRST statement or the SECOND statement comes closer to your views, even if neither is exactly right.

Clear majority support for new oil and gas projects in the North Sea after Russia cut-off, even in the face of climate objections, particularly Conservative voters

1) The government should not allow any new oil and gas projects to start up in the North Sea, to control the UK's greenhouse gas emissions.

2) We should develop new oil and gas projects in the North Sea to help Britain and our neighbours cut imports from Russia.

■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat ■ Don't know



On the following pages are some pairs of statements. For each, please indicate whether the FIRST statement or the SECOND statement comes closer to your views, even if neither is exactly right.

Total sample, n=2,000; Engaged, n=1,358; Red Wall, n=263; Conservative voters, n=584; Johnson shifters, n=155

A photograph of Boris Johnson, a man with blonde hair, wearing a dark blue suit, white shirt, and a light blue patterned tie. He is standing behind a wooden podium with a blue panel on the right side that features the Conservative Party logo (a stylized tree) and the word "Conservat". He has both hands raised in the air, palms facing forward, as if making a point or gesturing during a speech. The background is dark with some blue light streaks.

The Johnson government and climate change

£400 energy bill discount is the most important policy in government's cost of living support package

Importance of policies in **government cost of living support package**, total sample

An energy bill discount of £400 to every household in the UK

51

Introduce a temporary 25% levy on the profits of oil and gas companies, with an investment allowance to incentivise the reinvestment of profits

41

£15bn package to deliver support worth £1,200 to the 8 million poorest households

40

An extra winter fuel payment of £300 to eight million pensioner households

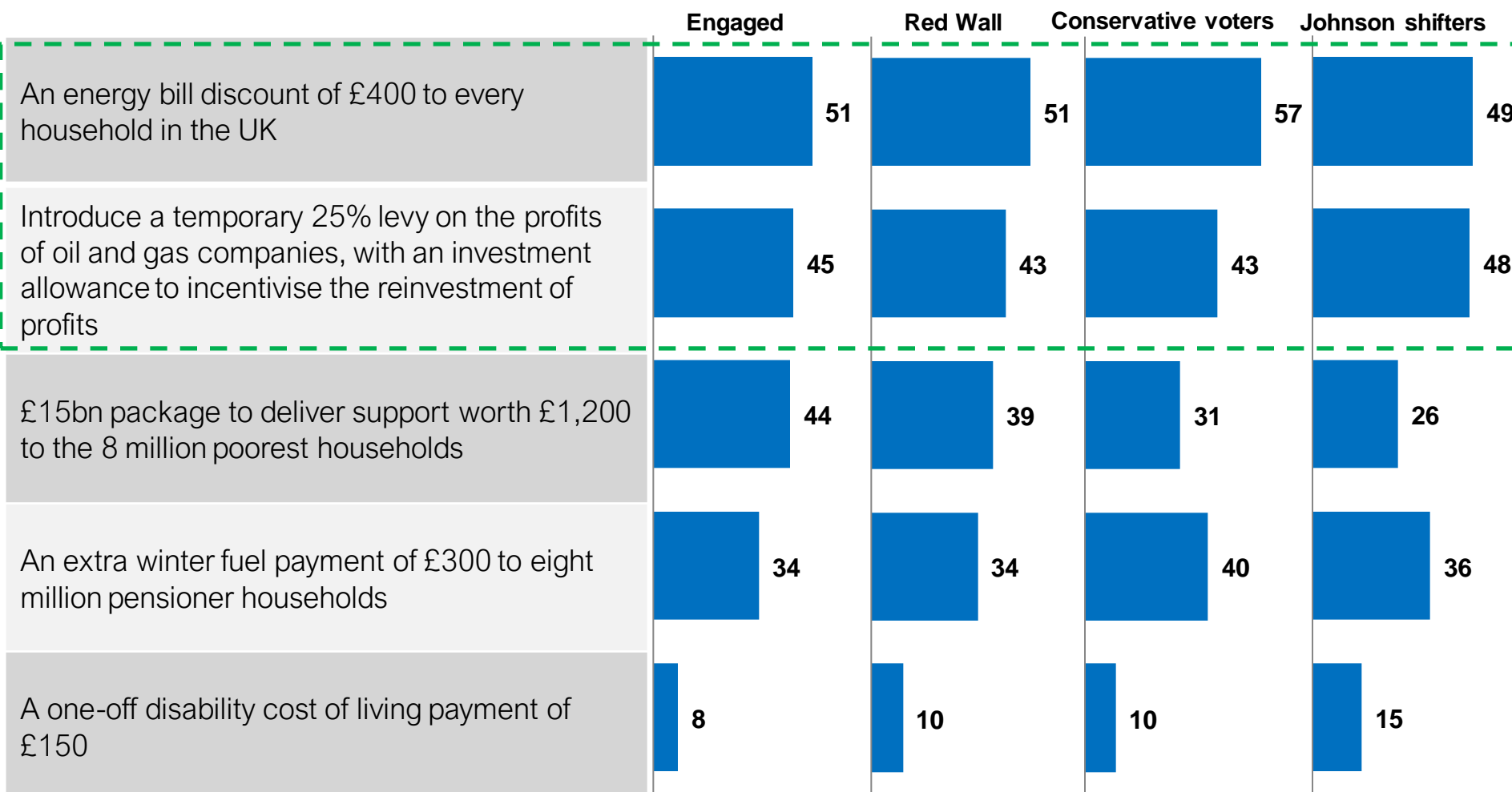
32

A one-off disability cost of living payment of £150

10

Energy bill discount and levy on oil and gas companies are strongest across target groups

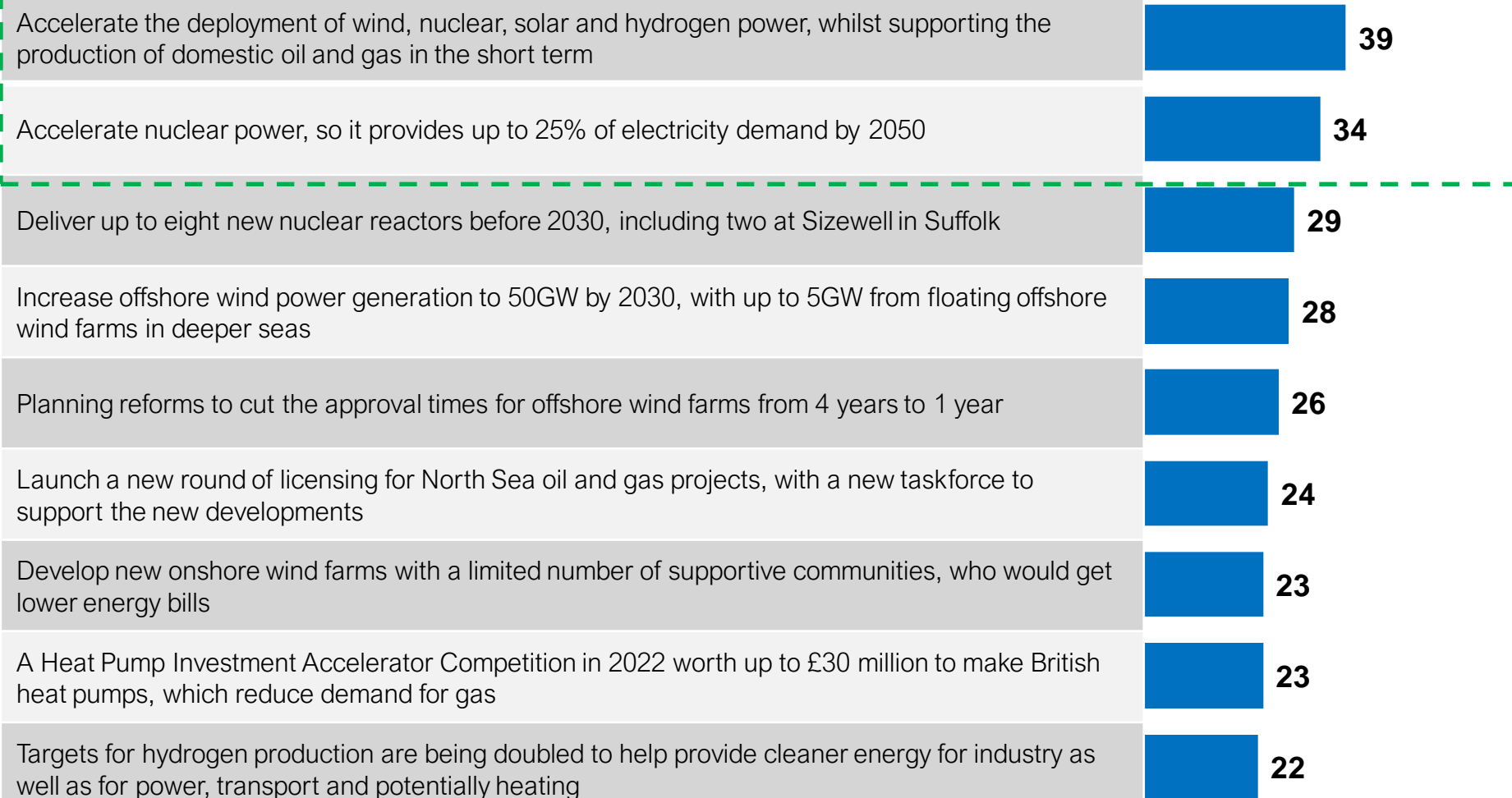
Importance of policies in **government cost of living support package**, by target



Engaged, n=1,358; Red Wall, n=263; Conservative voters, n=584; Johnson shifters, n=155

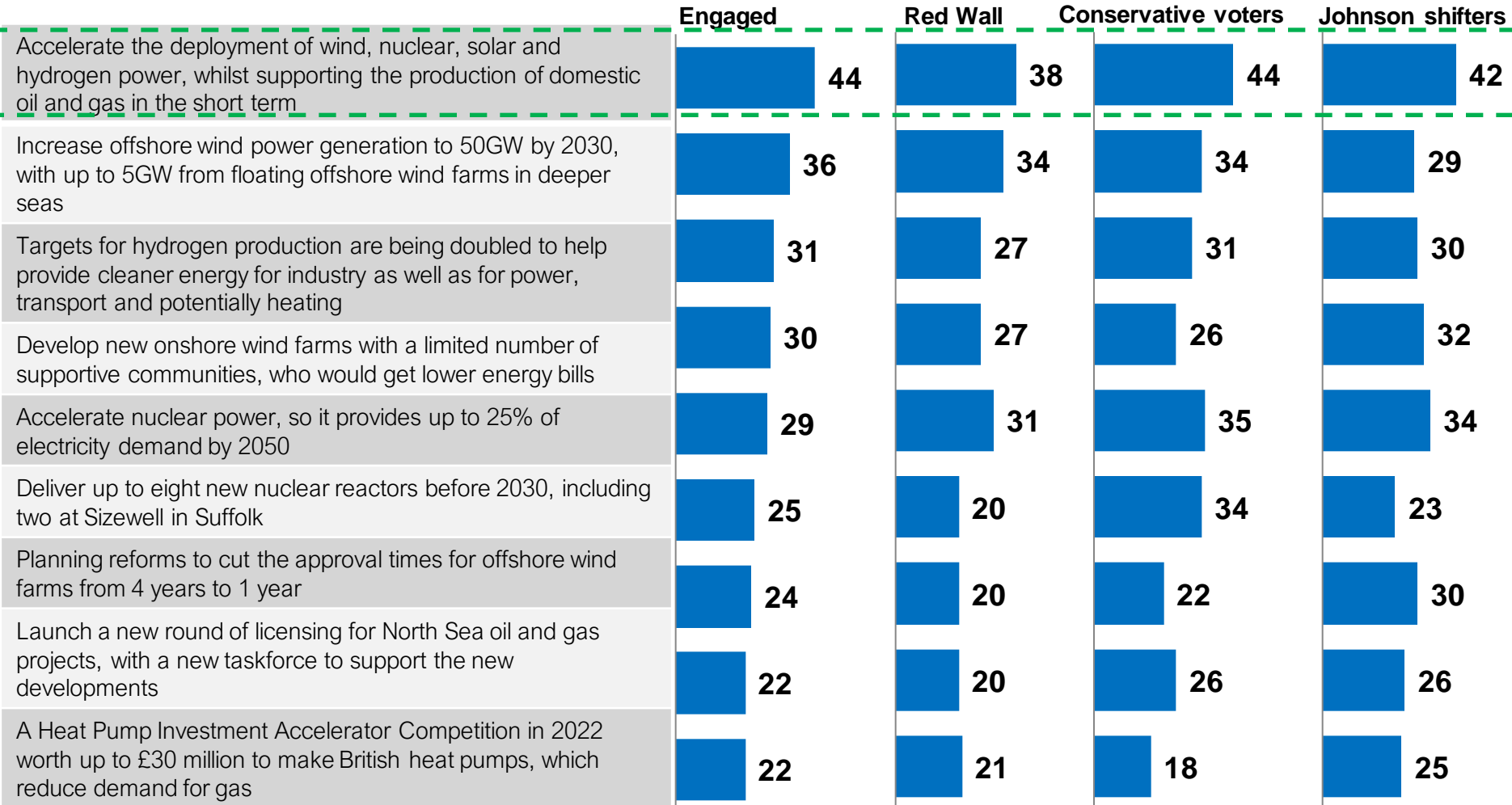
Acceleration of renewables while supporting domestic oil/gas is most important policy in the Energy Strategy, followed by nuclear

Importance of policies in **government Energy Strategy**, total sample



Targets agree acceleration of renewables – particularly Conservative voters — while supporting domestic oil/gas is the most important policy

Importance of policies in **government Energy Strategy**, by target



Engaged, n=1,358; Red Wall, n=263; Conservative voters, n=584; Johnson shifters, n=155

Introducing Ofgem as regulator for heat networks and extending energy price cap are top policies from Energy Security Bill

Importance of policies in **government Energy Security Bill**, total sample

Make Ofgem the regulator for heat networks, ensuring consumers get a fair price and a reliable supply of heat

32

Extend the energy price cap beyond 2023

32

Reduce the risk of fuel supply disruption by giving government the power to give directions to, require information from, and provide financial assistance to important fuel businesses

28

Enable the first ever large-scale hydrogen heating trial, to show how this technology can reduce emissions from heating

28

Introduce new business models for low-carbon industries like Carbon Capture, Usage and Storage, and low-carbon hydrogen and industrial carbon capture

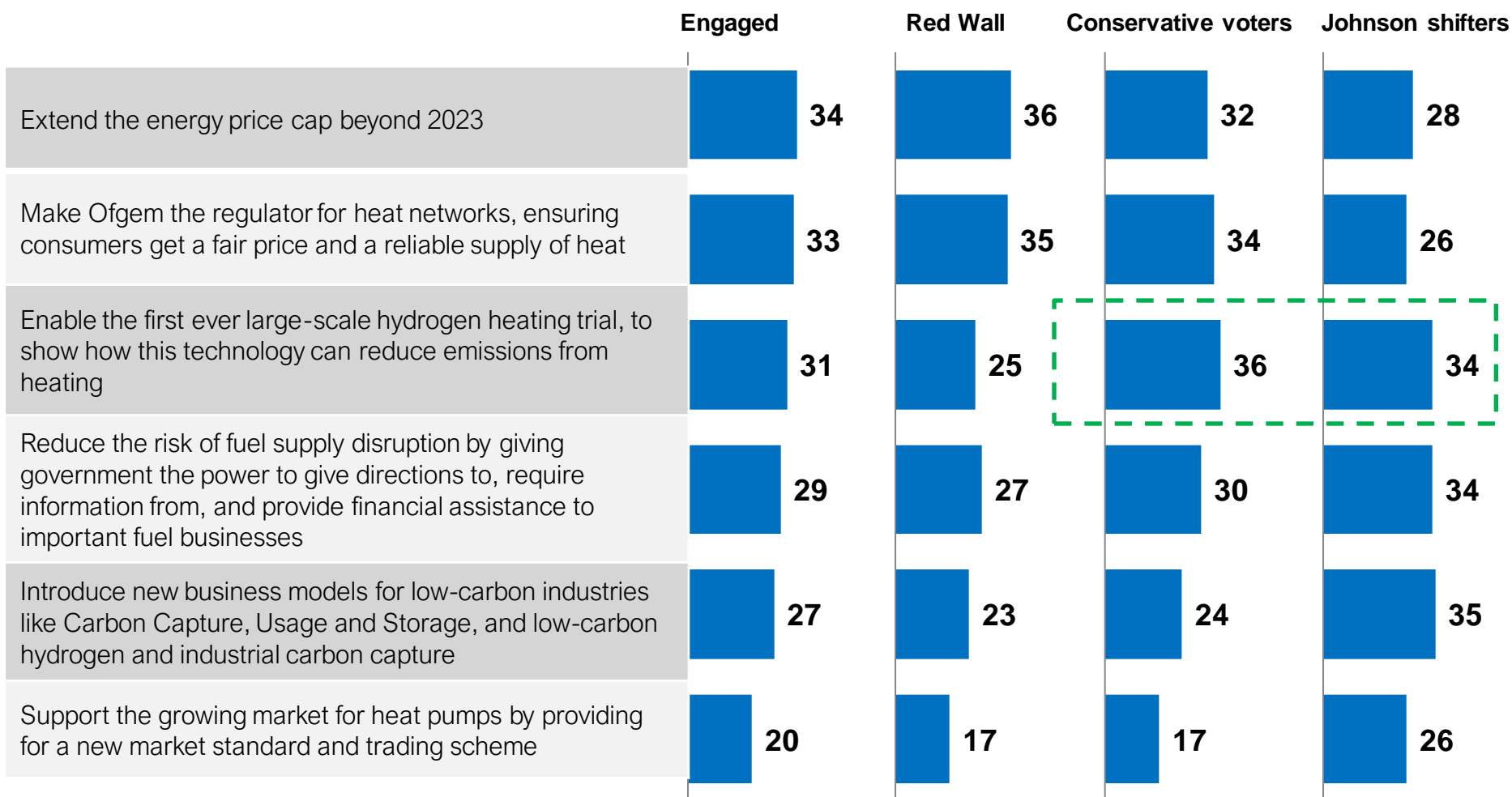
25

Support the growing market for heat pumps by providing for a new market standard and trading scheme

21

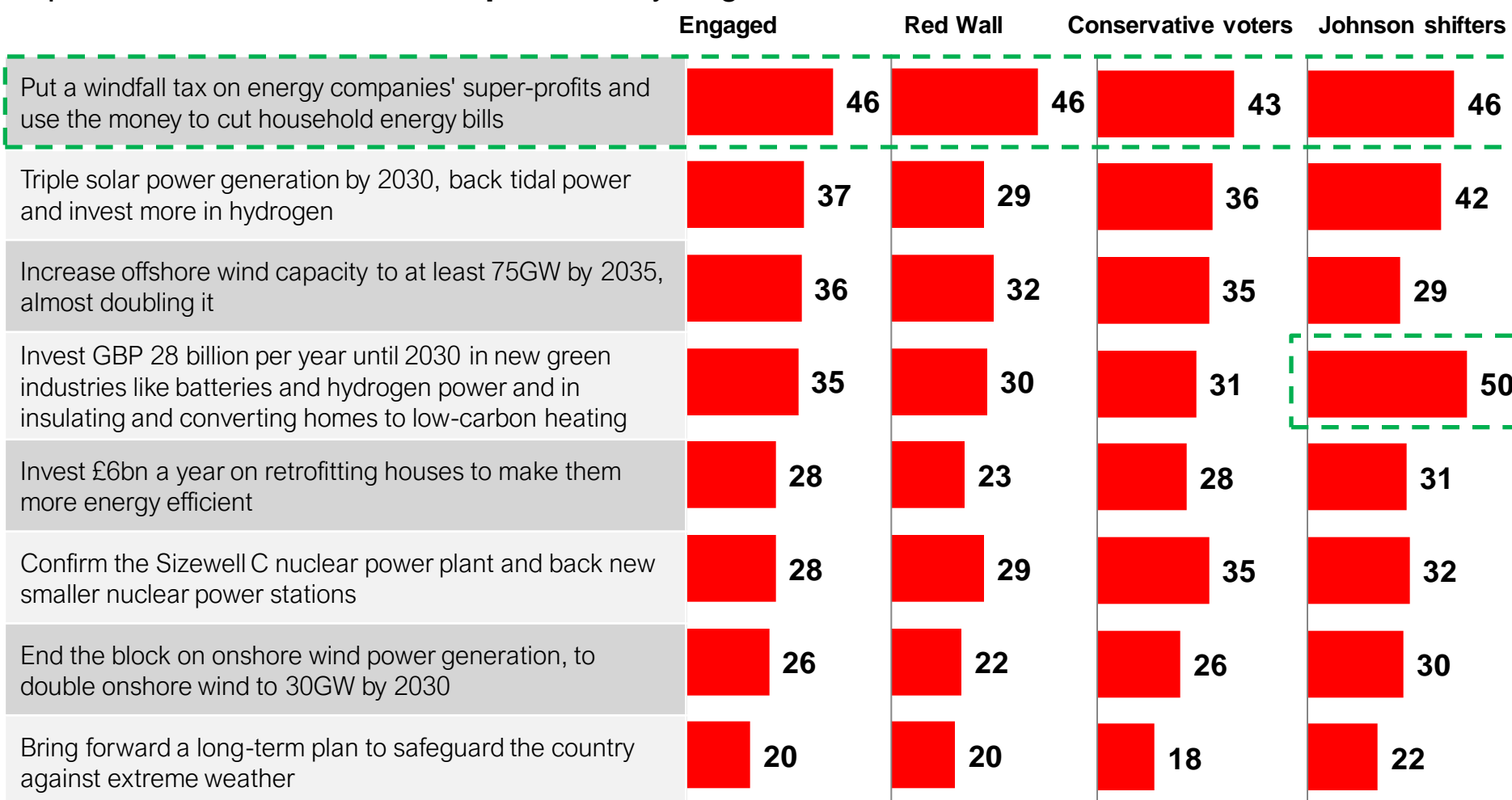
Similar policies are strong across target groups, though Tory voters and Shifters also rate hydrogen heating trial highly

Importance of policies in **government Energy Security Bill**, by target



Labour's windfall tax is strongest across groups, though investment in green industries also hits some targets

Importance of Labour climate policies, by target



Pro-Climate political messages from the government: full wording

Windfall

The oil and gas sector is making extraordinary profits, not as the result of recent changes to risk-taking or innovation or efficiency, but as the result of surging global prices driven in part by Russia's war. We are sympathetic to the argument to tax those profits fairly. It is possible to both tax extraordinary profits fairly and incentivise investment.

Independence

We need to meet the long-term impacts of the spike in energy prices, which is why we have an energy independence plan for this country for the long term, with a sustainable, cost-efficient energy supply. We take a sober, responsible approach to end our dependence on hydrocarbons altogether, particularly Russian hydrocarbons.

Nuclear

Nuclear is central to our long-term plan to bolster the UK's energy security with cheaper, cleaner, home-grown power, while creating thousands of high-skilled jobs across our country. We will encourage new companies to build in Britain, boosting competition and cutting costs so consumers benefit in the long-term.

Made in Britain

We're setting out bold plans to scale up and accelerate affordable, clean and secure energy made in Britain, for Britain - from new nuclear to offshore wind. This will reduce our exposure to volatile international energy prices, so we can enjoy greater energy self-sufficiency with cheaper bills.

Renewable

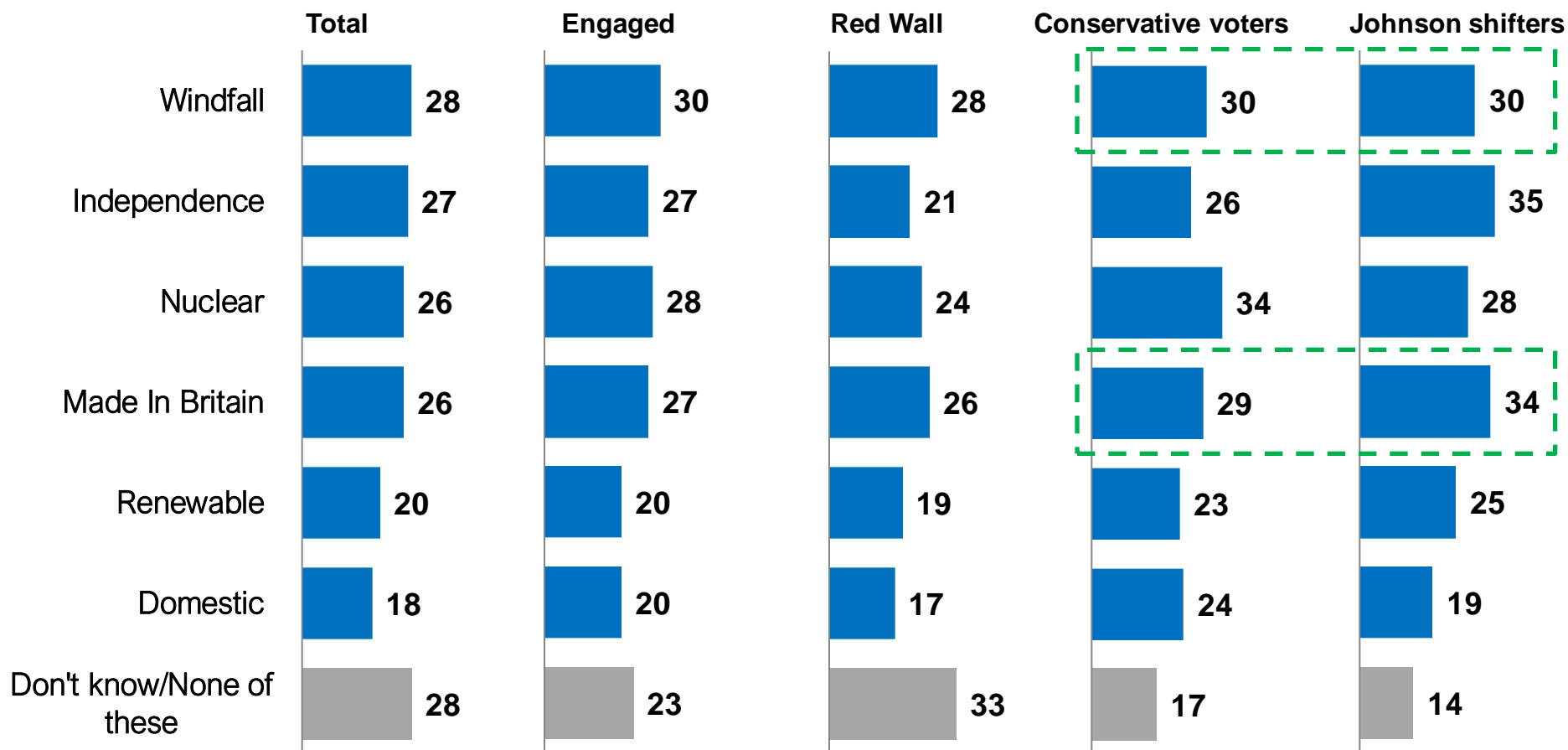
Thanks to the government, we are dependent on Russian gas for only 3% of our gas needs, unlike virtually every other European country. It is thanks to the massive investment we have made in renewables that we are the Saudi Arabia of wind power, producing more offshore wind than virtually any other country in the world.

Domestic

We back North Sea gas for jobs, security and tax revenues for public services. But in the long-term, we need renewables, and new nuclear for when the wind doesn't blow and the sun doesn't shine. We are reversing 30 years of drift with the first new power station in a generation.

Among Conservative and Red Wall voters, windfall tax and “British energy” are key

Government climate statements, by target



Below are some statements from the government supporting its plans on climate change. Which TWO do you find most CONVINCING?

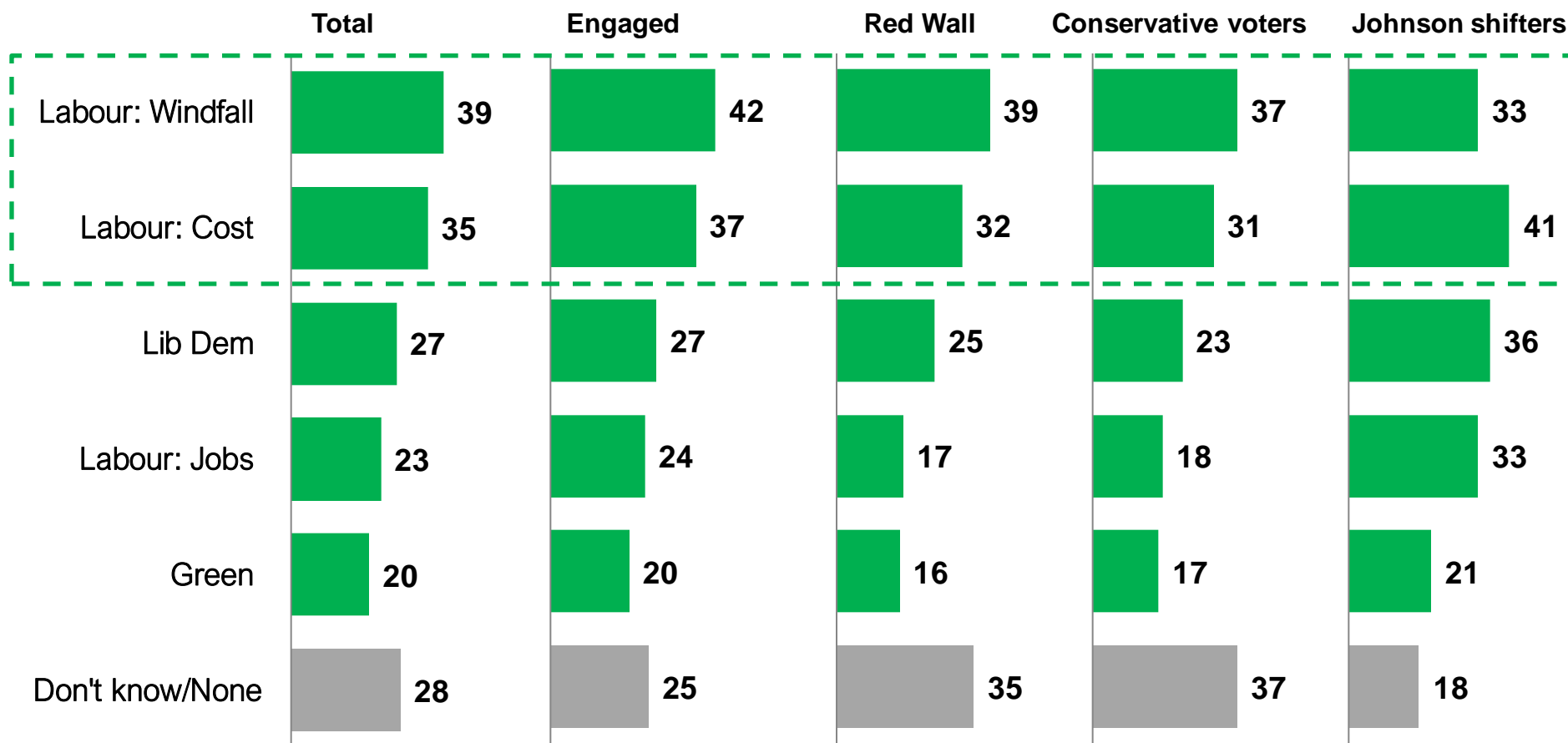
Total sample, n=2,000; Engaged, n=1,358; Red Wall, n=263; Conservative voters, n=584; Johnson shifters, n=155

Political messages from opposition parties: full wording

Windfall	Labour says: With so many people struggling to pay their energy bills, we should have a windfall tax on oil and gas companies in the North Sea. It is staggering that the Government protects oil and gas giants making record profits whilst working people struggle with their energy bills.
Cost	Labour says: Insulating homes to cut bills, protect our pensioners, and reduce our dependence on Russian gas must now be an urgent priority. Government could start now, insulating 2 million homes this year. Anything less will damage our energy security and leave families to pay the cost.
Lib Dem	The Liberal Democrats say: The Chancellor is failing millions of people hit by high bills. He could cut energy bills now, using our Robin Hood windfall tax on fossil fuel giants' huge profits. Instead he protects fossil fuel profits - and pushes you to pay instead.
Jobs	Labour says: When I hear climate change, I think jobs. That's why we would make £28bn of green investments a year until 2030, in British homes and in the industries of the future. That's what we're about - decent jobs with a future.
Green	The Green Party says: To prevent climate breakdown, we have to leave fossil fuels in the ground. Instead of more drilling, the Government should be working to stop the burning of fossil fuels. We need information about fossil fuel deposits and who is digging them up.

Top opposition messages come from Labour and call for windfall tax and helping with household bills

Left wing opposition party climate statements, by target



Below are some statements from the opposition parties about climate change. Which TWO do you AGREE with the most?

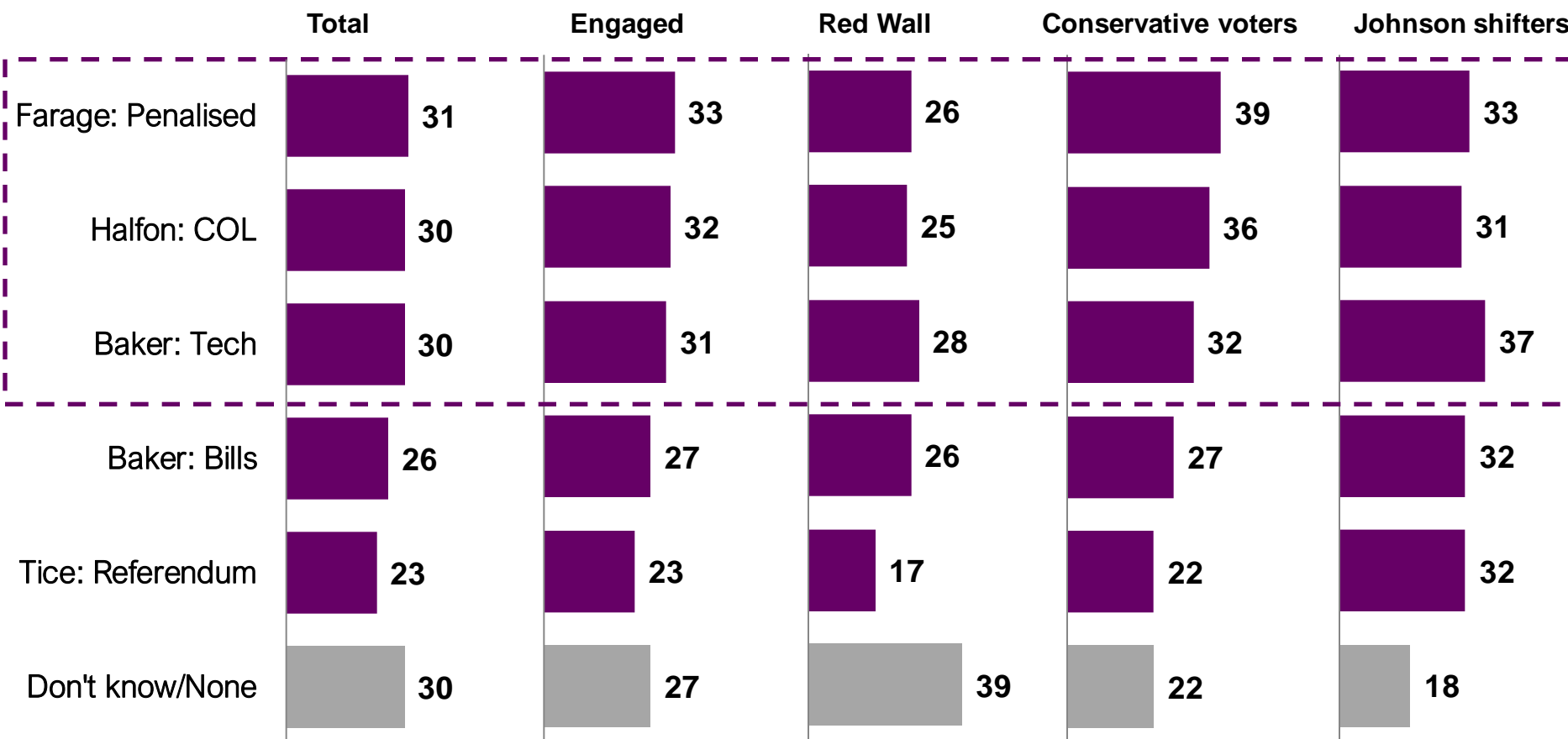
Total sample, n=2,000; Engaged, n=1,358; Red Wall, n=263; Conservative voters, n=584; Johnson shifters, n=155

Political attacks from the right on net-zero: full wording

Penalised	Nigel Farage says: Net Zero fanatics want to force us to drive electric cars and buy heat pumps. But many people cannot afford to. Britain produces just one per cent of global CO2, while China builds scores of coal power stations every year, so why are we being penalised?
Cost of living crisis	Conservative MP Robert Halfon says: Millions are now being hit by soaring bills for heating and fuel. We cannot sacrifice their ability to cope on the altar of climate change. Costly environmental plans are dreamt up by wealthy civil servants, with no idea about how people struggle.
Tech	Conservative MP Steve Baker says: The dirty secret of Net Zero is we can't generate enough power when it's not windy. Batteries, hydrogen and other technologies aren't ready. On windless winter nights, Net Zero will mean quivering under duvets in the dark.
Bills	Conservative MP Steve Baker says: "Net Zero" will end the comfortable lifestyles we have enjoyed for generations. Households have already poured £11 billion into renewables through their energy bills. The final cost of Net Zero could be over £100,000 per household. Let's stop before it's too late.
Referendum	Richard Tice from Reform UK says: The Government's Net Zero plans will change the way you heat your homes, the cars you drive, what you are supposed to eat, how much you can travel. This needs proper debate and we should all have a say. We need a referendum on Net Zero.

None of the right-wing messages pop and responses are fragmented

Right wing opposition party climate statements, by target



Below are some statements from politicians and organisations opposing the government's plans on climate change. Which TWO make you most WORRIED about these plans?

Total sample, n=2,000; Engaged, n=1,358; Red Wall, n=263; Conservative voters, n=584; Johnson shifters, n=155

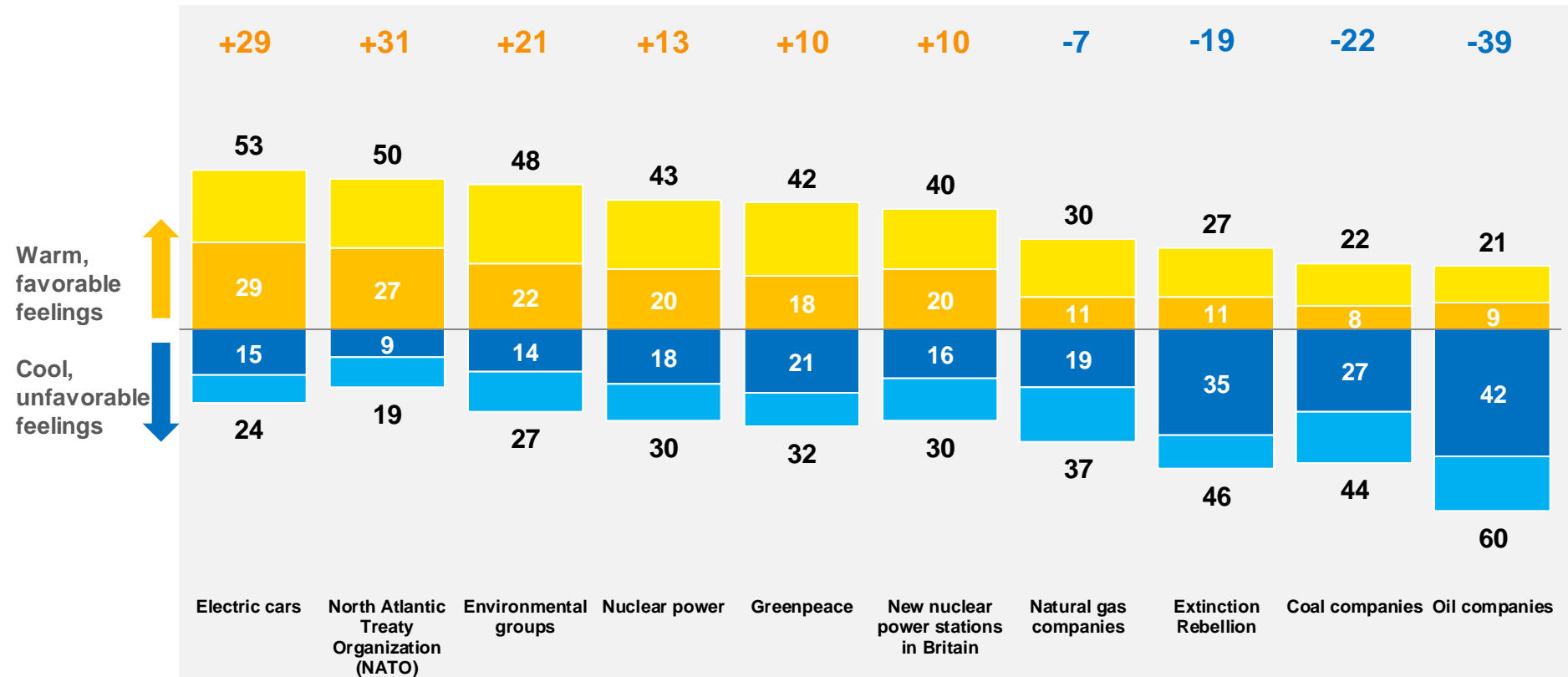
Perceptions of business



EV's, environmental groups, nuclear viewed favorably; natural gas much stronger than coal and oil

Feelings toward companies and environmental actors, total sample

■ Cool (26-49) ■ Warm (51-74)
■ Very cool (0-25) ■ Very warm (75-100)



Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.

Total sample, n=2,000

CLIMATE *Policy & Strategy*

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Tracking survey, June 2022

