

CLIMATE *Policy & Strategy*

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



What this is based on

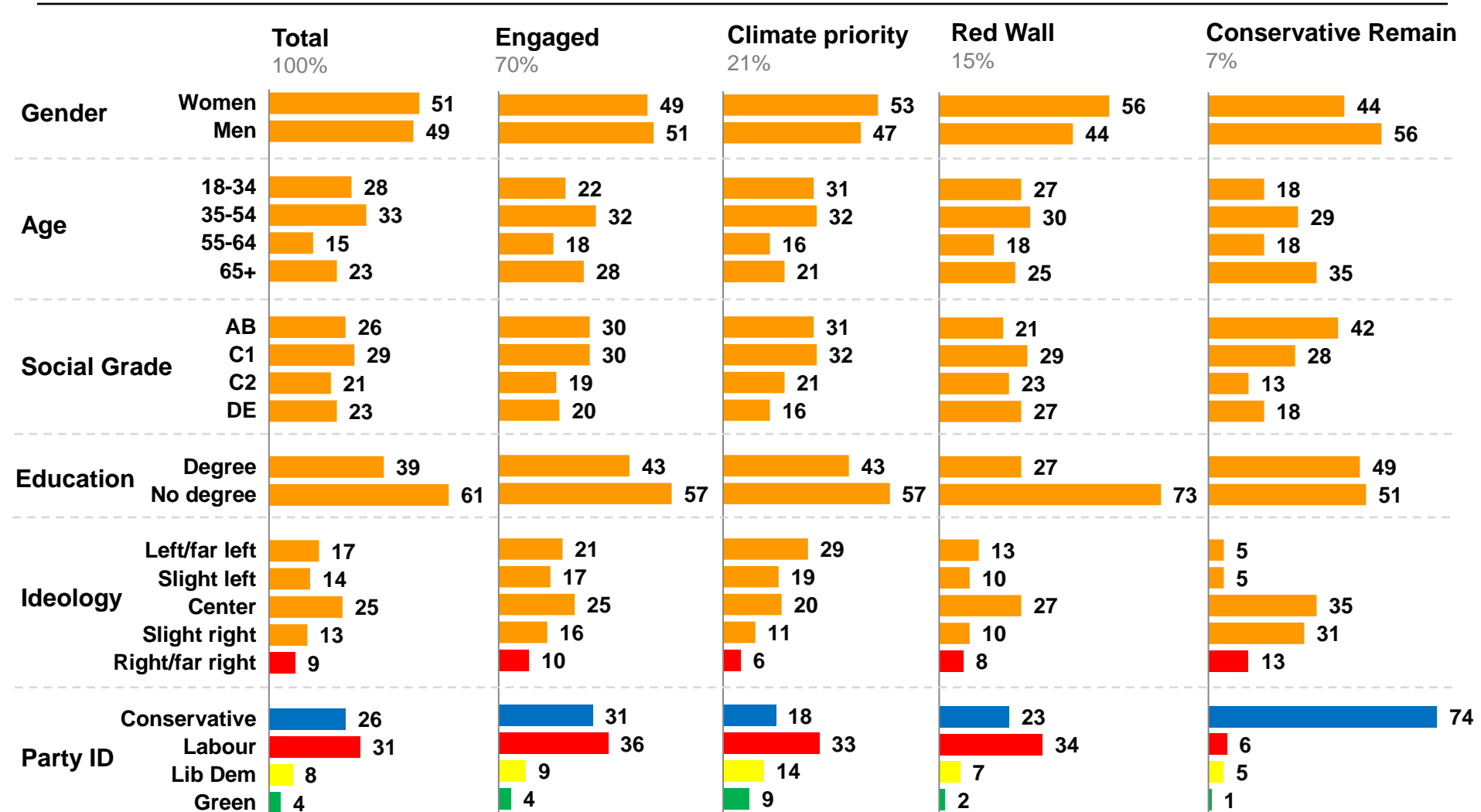
Our poll

- N=2,030 nationally representative survey of Great Britain
- Fieldwork: October 13-21, 2022
- Online, 20-minute questionnaire
- Weighted to national statistics on gender, age, region, education, social grade, ethnicity and past voting behaviour
- Current vote intention among likely voters:
 - Labour – 46%, Conservative – 26%, Lib Dems – 9%, SNP – 4%, Greens – 3%, Reform – 3%

Target groups

Group	Definition
Total	All respondents – represents national 18+ population of Great Britain
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 Remain	Voted Conservative in the 2019 General Election, voted Remain in the EU Referendum

Profile of target groups



What you need to know

- ››› The cost of energy and struggle for households to keep up with rising prices continues to dominate issues in Britain. Climate change drops in priority for the public, including voters of all three major parties, but remains a major concern ahead of immigration and crime.
- ››› Although half are concerned about heating their home this winter, and they strongly prioritise government reducing their energy bills rather than carbon emissions, they do not pull back from the energy transition. Instead they want to double down on a shift to renewables.
- ››› The public don't see climate and energy as a zero-sum game. Instead they think renewable energy is the way out of the crisis. Every group still thinks climate requires major action. No group blames the green transition for higher energy prices. All groups think the Russia-Ukraine invasion underlines the need for renewables.
- ››› The public are in favour of an active industrial policy driving the shift to low carbon economy. They think the government should support the low-carbon tech sector, and that energy companies should invest current excess profits in the transition to green.
- ››› The most favored sources of energy to replace what came from Russia are renewables, although a majority are also in favor of using more North Sea oil and gas. They are open to nuclear, and would see it as a sustainable investment.

What you need to know (2)

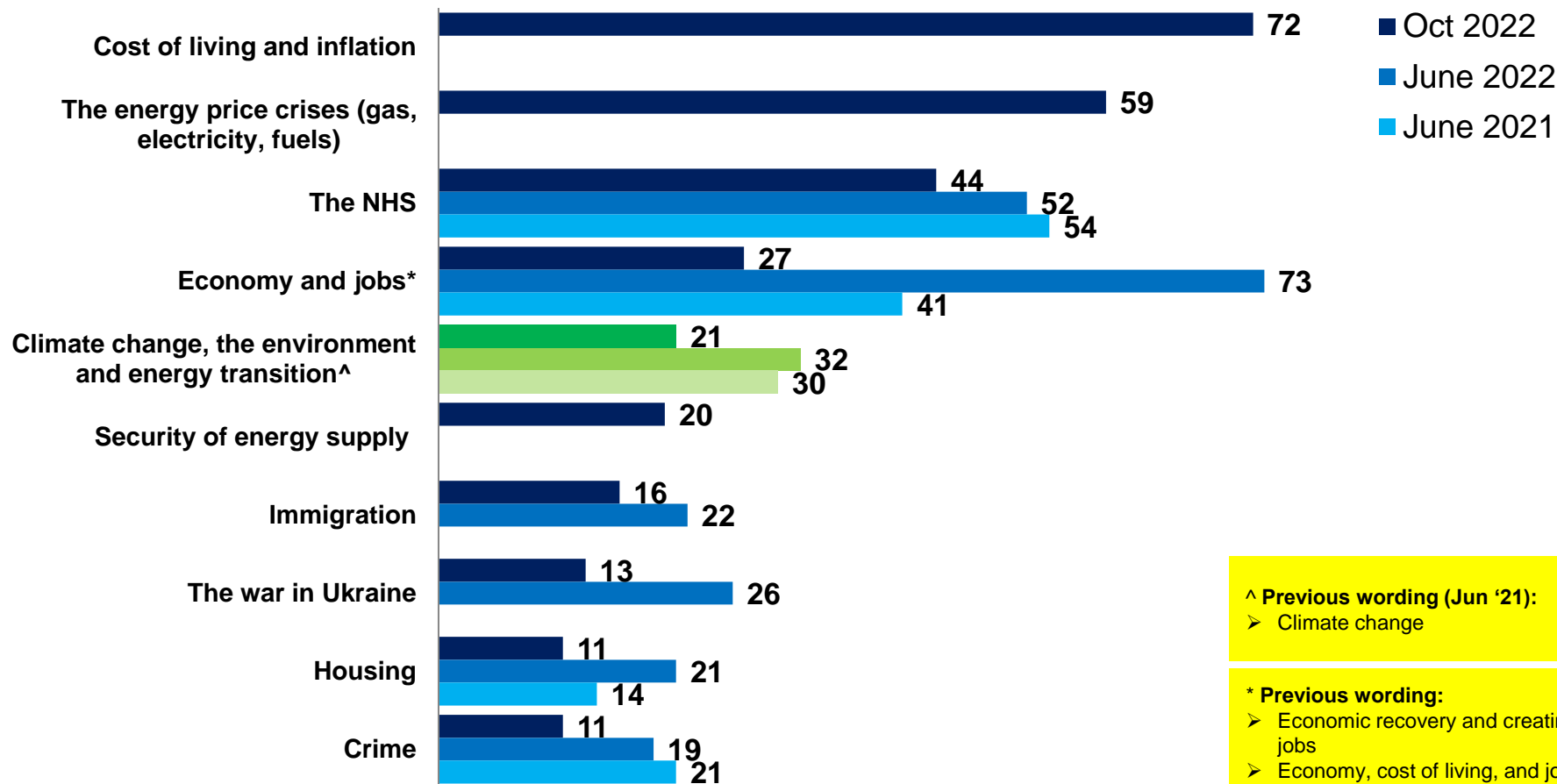
- ››› Trust in the government and approval of its actions on the economy and on climate and energy are all very low. People are generally positive about the government's energy bill support package, although they need to see the details for strong majorities to feel favorable. Proposals from government or opposition to implement a windfall tax and to freeze energy bills are popular.
- ››› Labour leads by 20 (46-26%) among likely voters. Its top policy is a freeze on energy bills funded by a windfall tax; its second-strongest policy is setting up Great British Energy. All targets, including Conservative Remainers, support a state-owned power company.
- ››› The strongest opposition message overall is on Conservative tax cuts for the rich, but Labour's promotion of Great British Energy is its best message for both the Red Wall and Conservative Remainers.
- ››› The government's strongest message is on achieving energy security through domestic oil and gas production, renewables and nuclear. Its (now defunct) ideological growth messages perform poorly.
- ››› From an extremely low base, the government's messages and policies achieve a very slight uplift in ratings, but leave it still far behind in approval.

Climate Context



Climate behind cost of living, energy prices and the NHS, but bigger priority than immigration, housing or crime

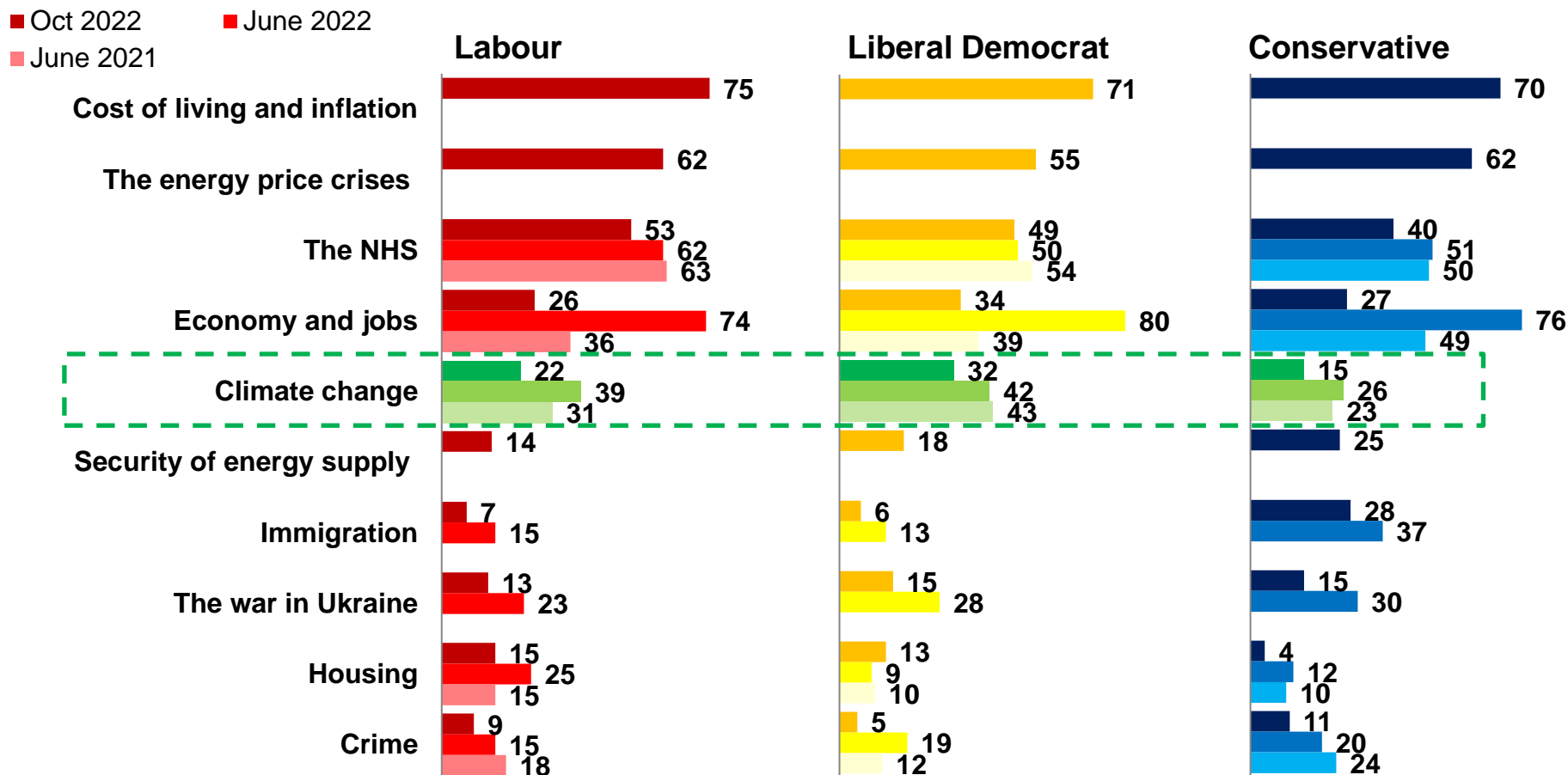
Priorities for government, total sample



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

Voters of all parties prioritise cost of living, energy prices and NHS; climate most significant for Lib Dem and Labour

Priorities for government, by past vote

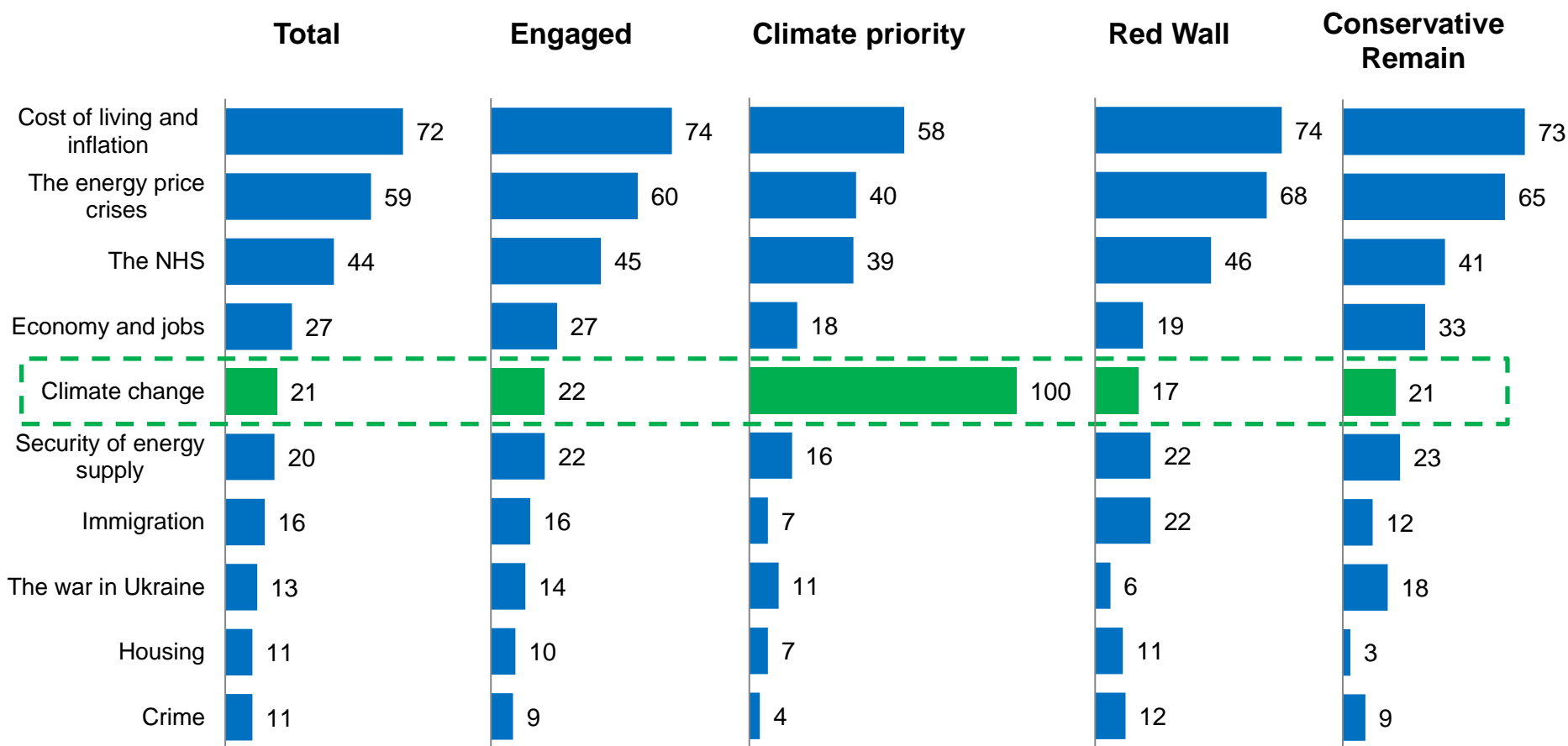


What are the *THREE* issues you think should be the top priorities for government?

2019 vote: Labour, n=473; Liberal Democrat, n=169; Conservative, n=640;

Similar picture across target groups, but clearly Conservative Remain put higher priority on climate than other Con voters

Priorities for government, by target

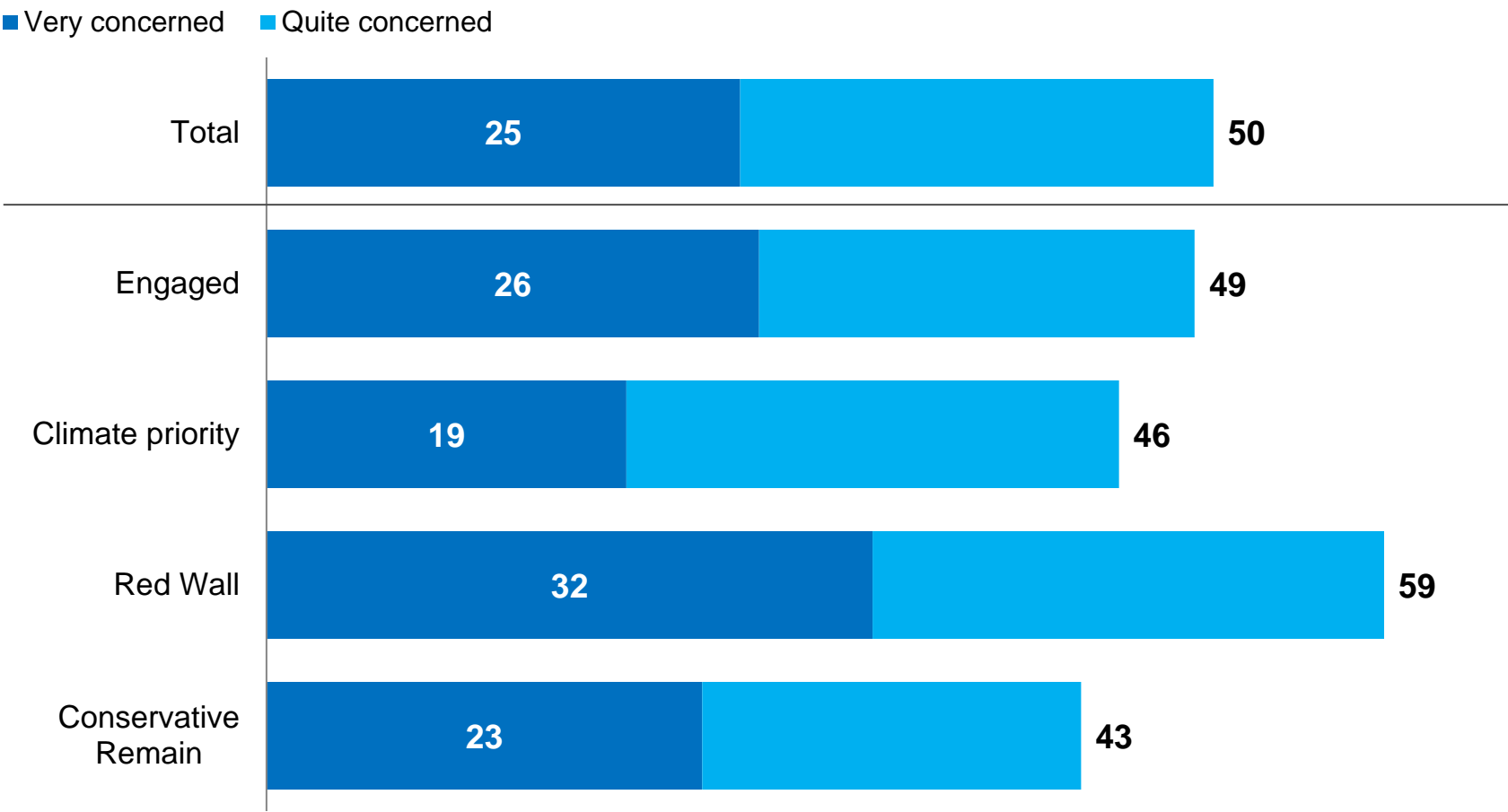


What are the *THREE* issues you think should be the top priorities for government?

Total, n=2,030; Engaged, n=1,411; Climate Priority, n=423; Red Wall, n=307; Conservative Remain, n=151

A majority of Britons worry about their ability to heat their home this winter, much higher in Red Wall

Ability to heat home this winter, by target



How concerned are you about your family's ability to heat your home this coming winter?

View that this is fundamentally an energy crisis has slightly intensified

1) The climate crisis is the more fundamental problem.

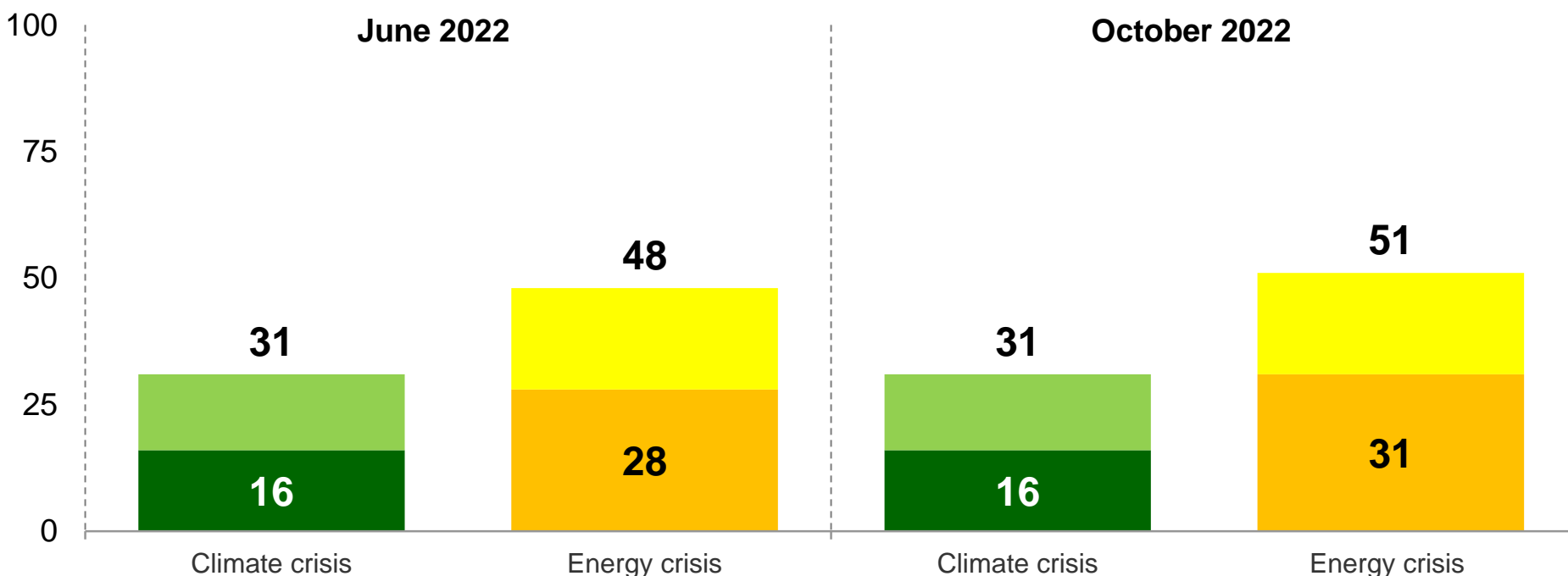
2) The energy crisis is the more fundamental problem.

■ Statement 1, much closer

■ Statement 1, somewhat

■ Statement 2, much closer

■ Statement 2, somewhat



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, n=2,030

All groups except Climate Priority want a priority on reducing bills over reducing emissions, including 70% of Red Wall voters

1) Reducing carbon emissions from energy use is more important.

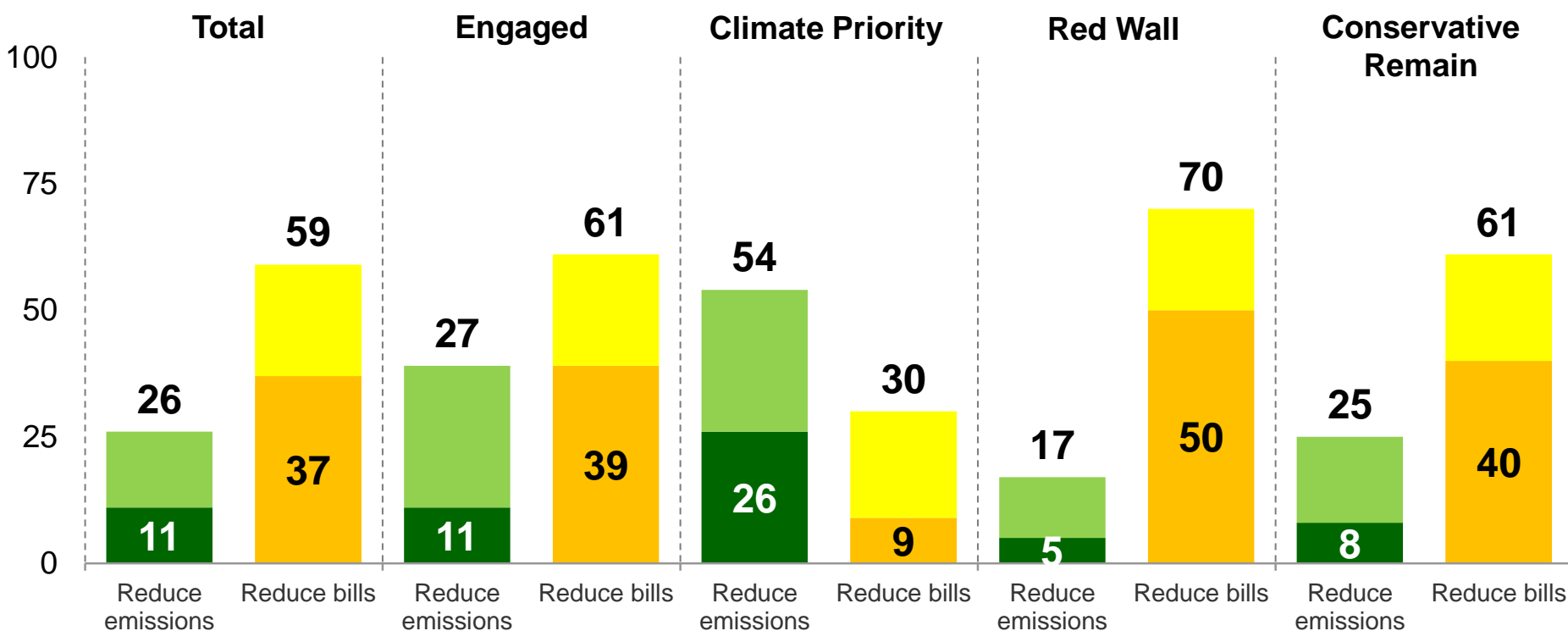
2) Reducing energy bills is more important.

■ Statement 1, much closer

■ Statement 1, somewhat

■ Statement 2, much closer

■ Statement 2, somewhat



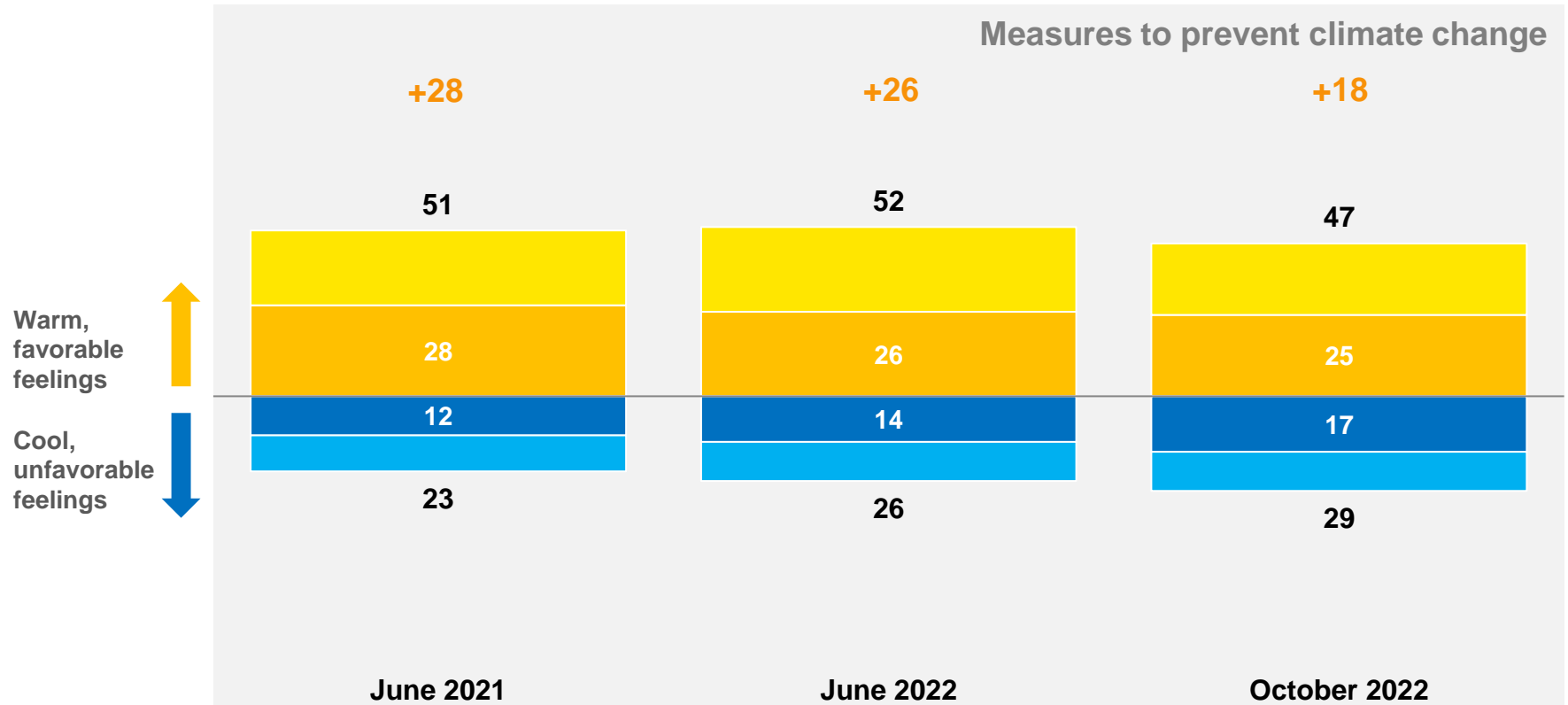
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Total, n=2,030; Engaged, n=1,411; Climate Priority, n=423; Red Wall, n=307; Conservative Remain, n=151

But, public still has clearly positive view of measures to prevent climate change, if slightly down since June

Feelings toward “measures to prevent 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, FAVORABLE feeling; zero meaning a VERY COLD, UNFAVORABLE feeling; and fifty meaning not particularly warm or cold.

Total, n=2,030; items shown to ½-sample splits

Consistent strong majority of the public say we need major action on climate, despite the high cost

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

2) (2021) The threat of climate change is exaggerated and we are already doing enough.

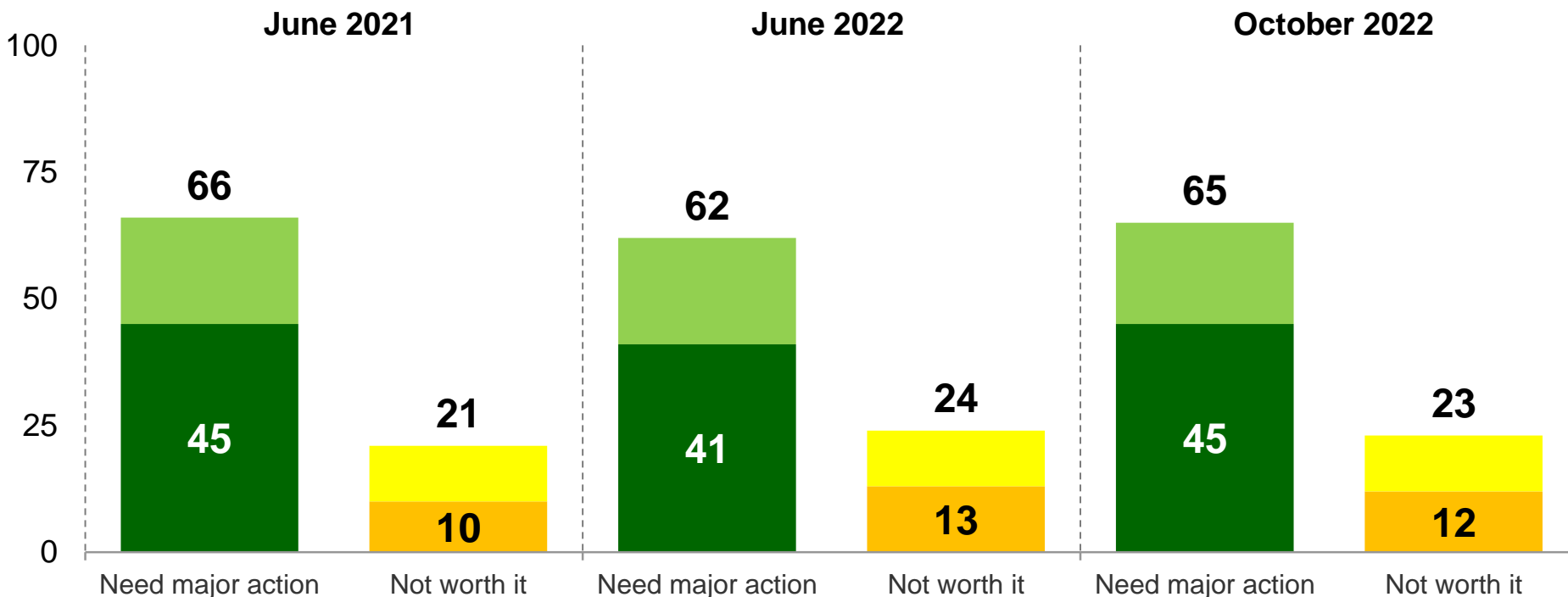
2) (2022) The threat of climate change is exaggerated and the high cost of fixing it may not be worth it.

■ Statement 1, much closer

■ Statement 1, somewhat

■ Statement 2, much closer

■ Statement 2, somewhat



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, n=2,030

All targets strongly endorse major action on climate — especially high for Conservative remain

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

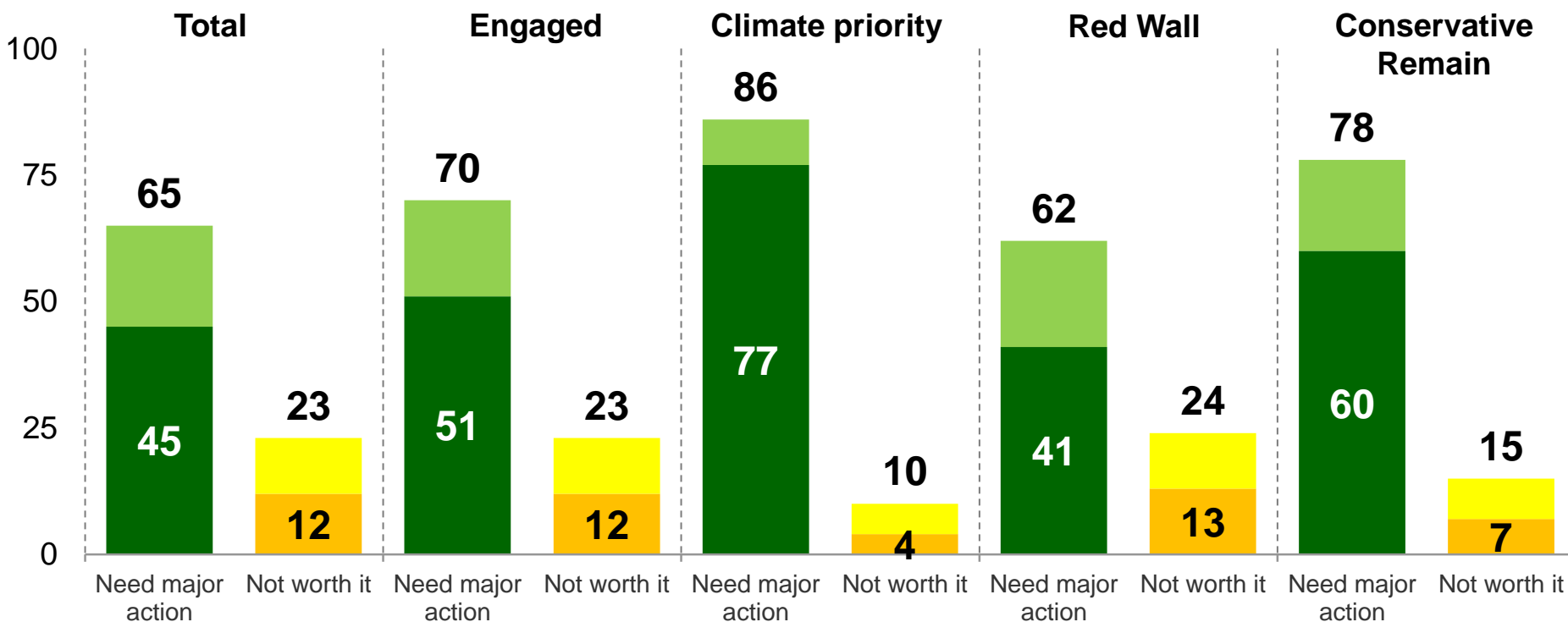
2) The threat of climate change is exaggerated and the high cost of fixing it may not be worth it.

■ Statement 1, much closer

■ Statement 1, somewhat

■ Statement 2, much closer

■ Statement 2, somewhat



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.

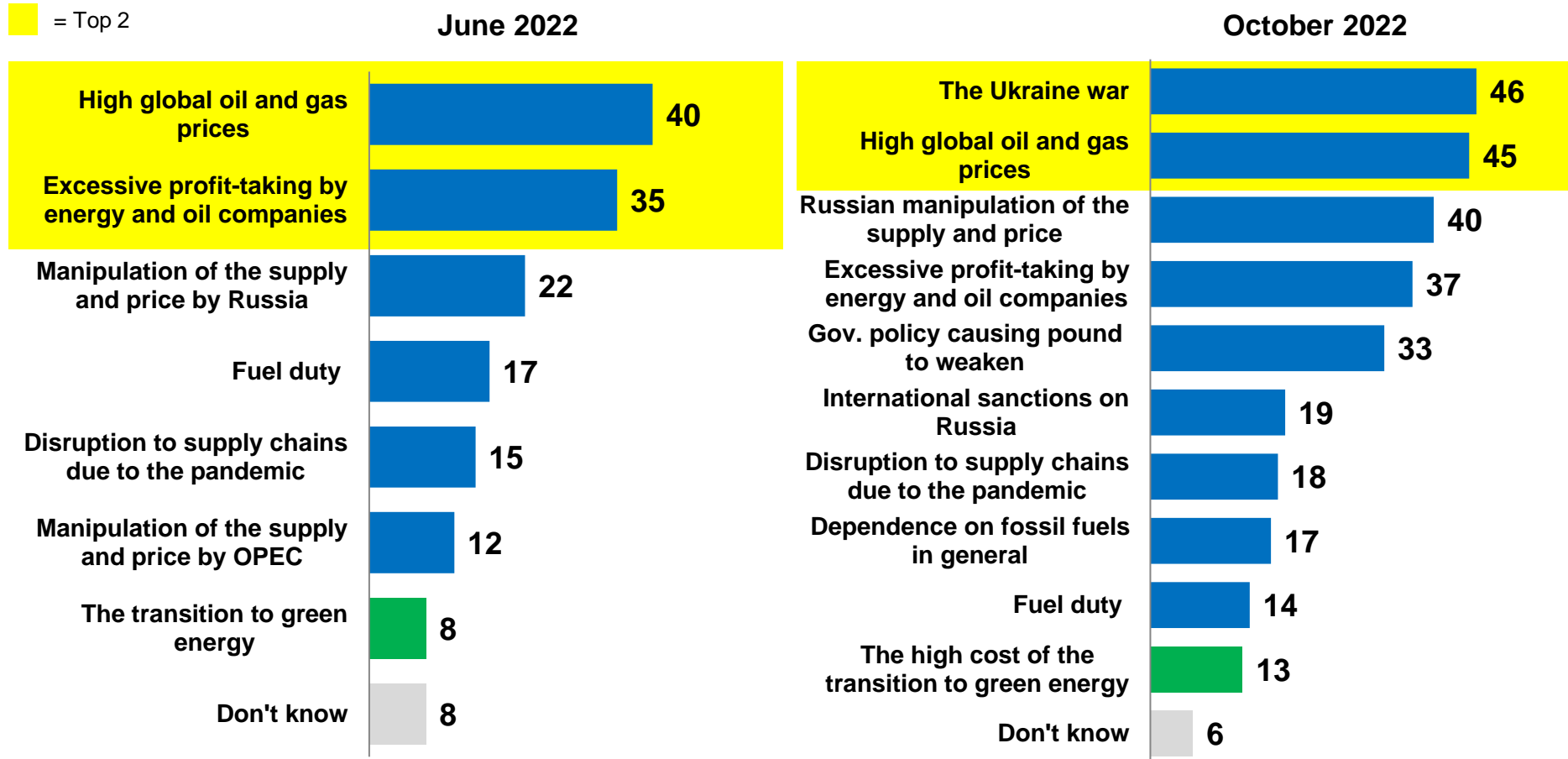
Total, n=2,030; Engaged, n=1,411; Climate Priority, n=423; Red Wall, n=307; Conservative Remain, n=151

Climate and energy policy



Britons blame inflation on the war and high oil and gas prices, as well as Russian manipulation & excess profits, not climate measures

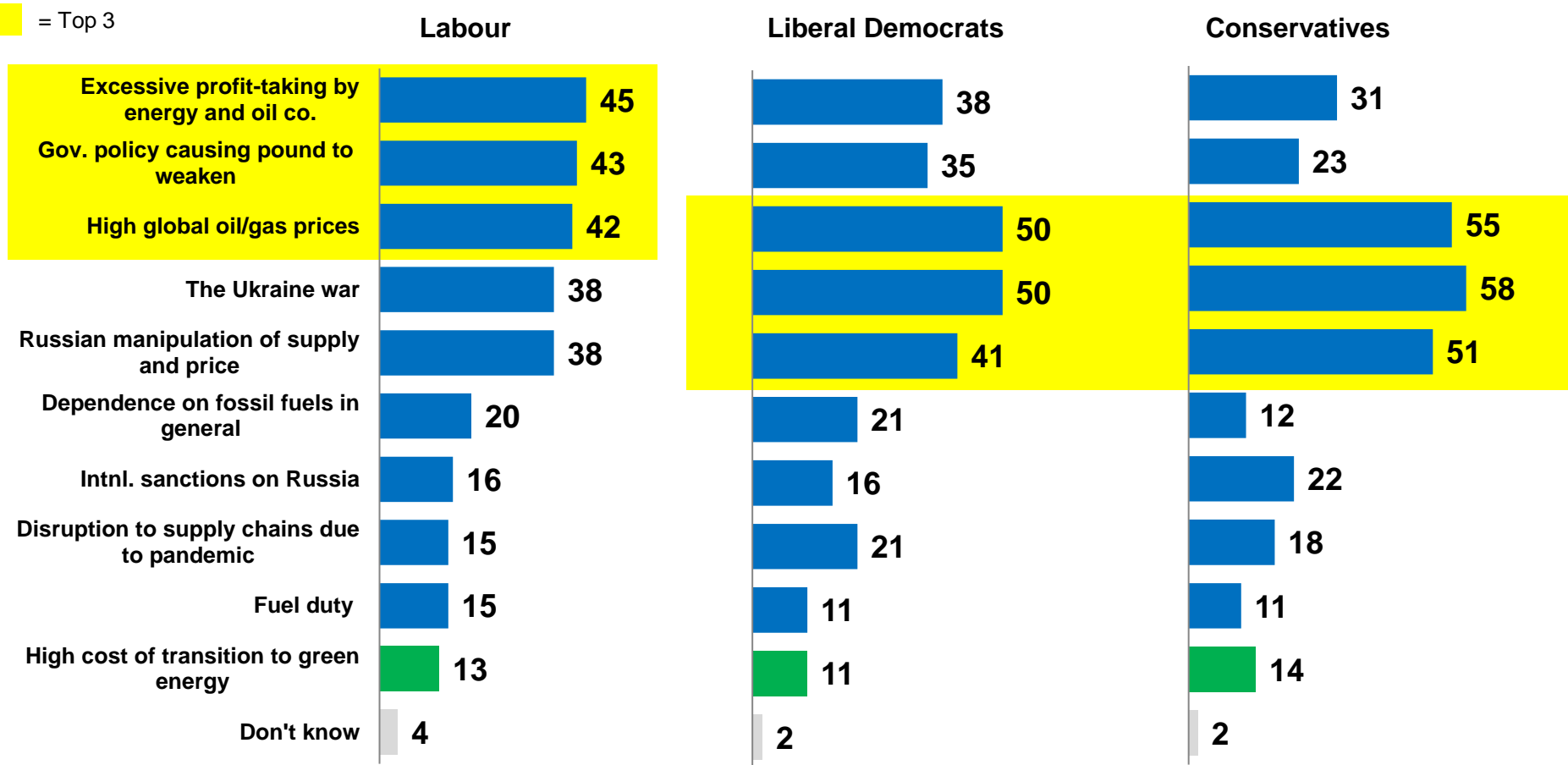
Reasons for increased cost of living, over time, total sample



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

Conservative voters consistent with Labour and Liberal Democrats in not blaming green transition for energy costs

Reasons for increased cost of living, by past vote

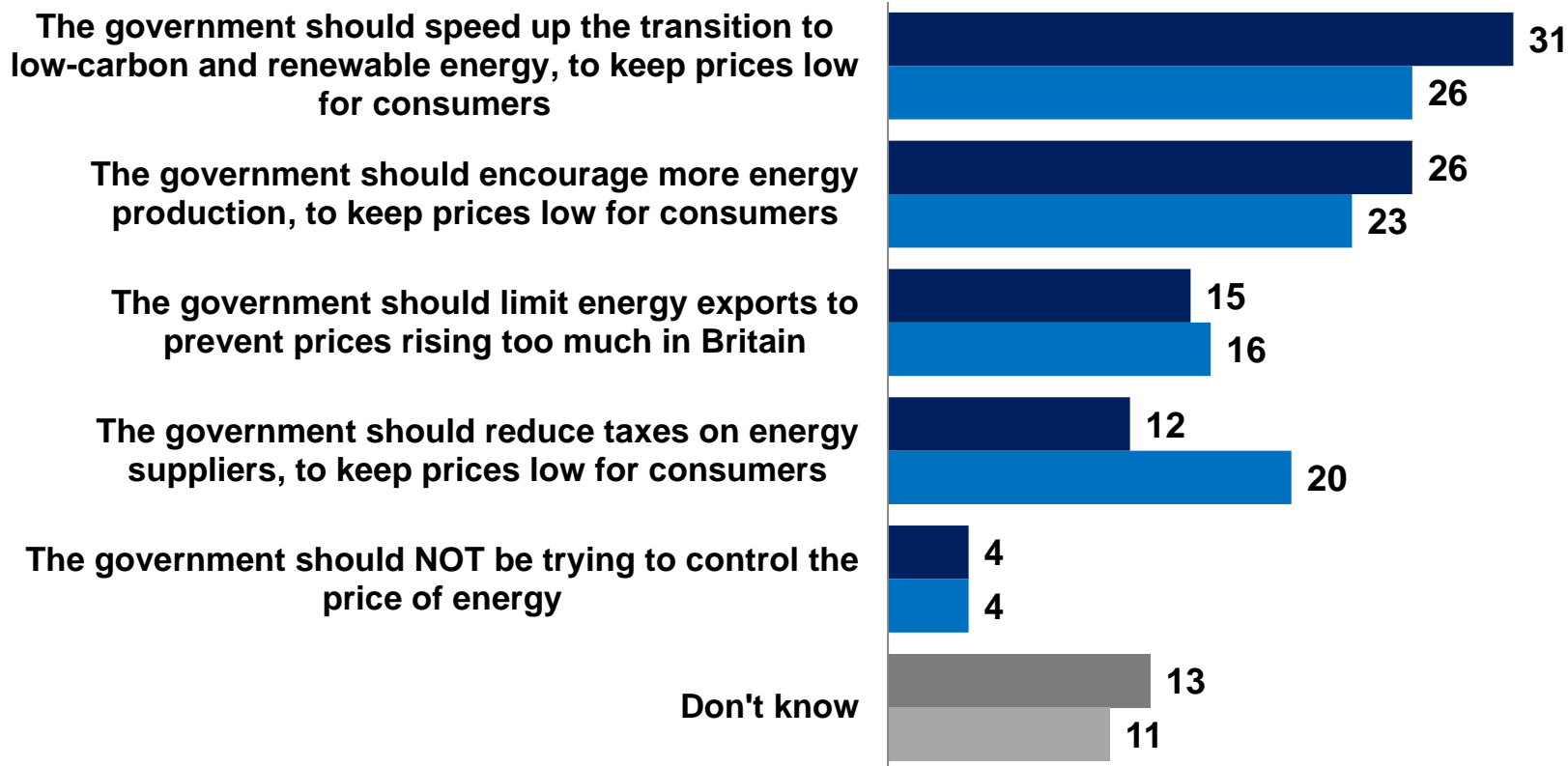


You may have noticed increased prices recently, particularly for energy and food. Why do you think energy prices are high today? Please select the THREE most important reasons from the list below.

To bring down prices, public favour government speeding the green transition, with some support for boosting production

Measures affecting energy prices, total sample

■ Oct-22 ■ Jun-22



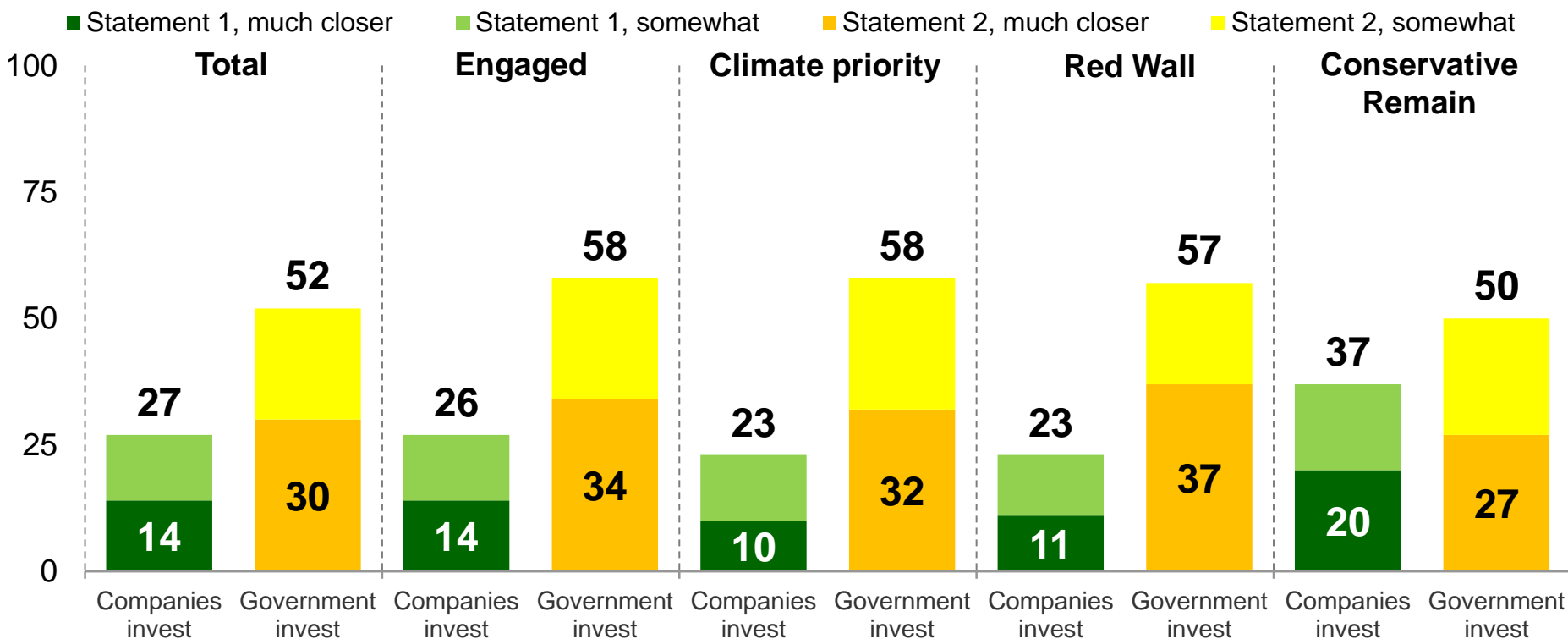
The government may take measures to affect energy prices for consumers. Which of the following statements is closest to YOUR view?

Shown ½ spit sample, n=989

All groups including Conservative Remainers endorse the idea of setting up a state-owned power company

1) The government should make it easier and cheaper for companies to invest in Britain's energy infrastructure, but it would be wasteful and inefficient for the state to run a power company itself.

2) British consumers pay Swedish and French government-owned companies for their energy. The government should set up its own company to invest in British energy and make sure we see the benefits.

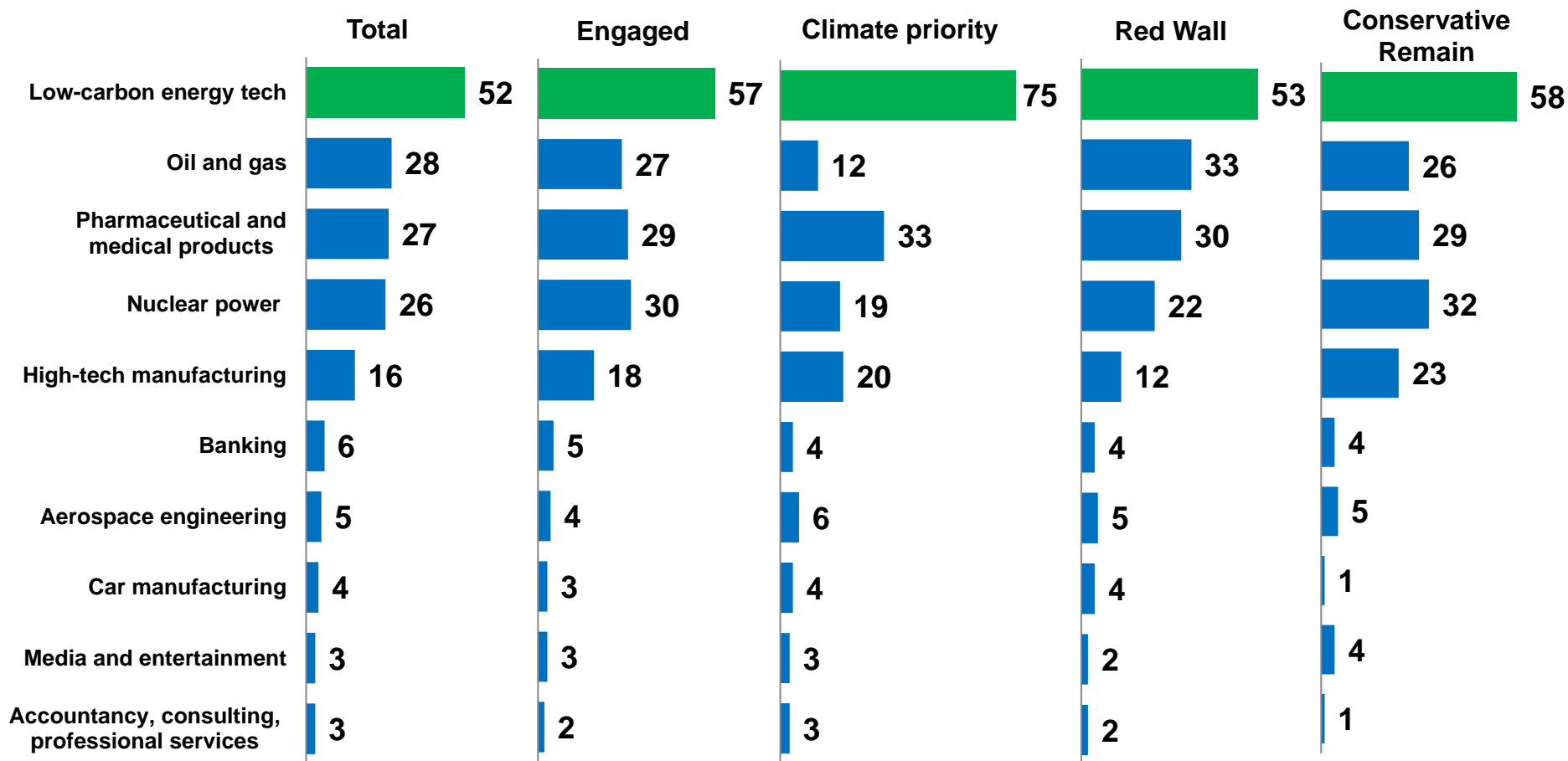


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Total, n=2,030; Engaged, n=1,411; Climate Priority, n=423; Red Wall, n=307; Conservative Remain, n=151

Low-carbon energy remains top sector for government to support across all target groups

Industries that government should support, by target



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

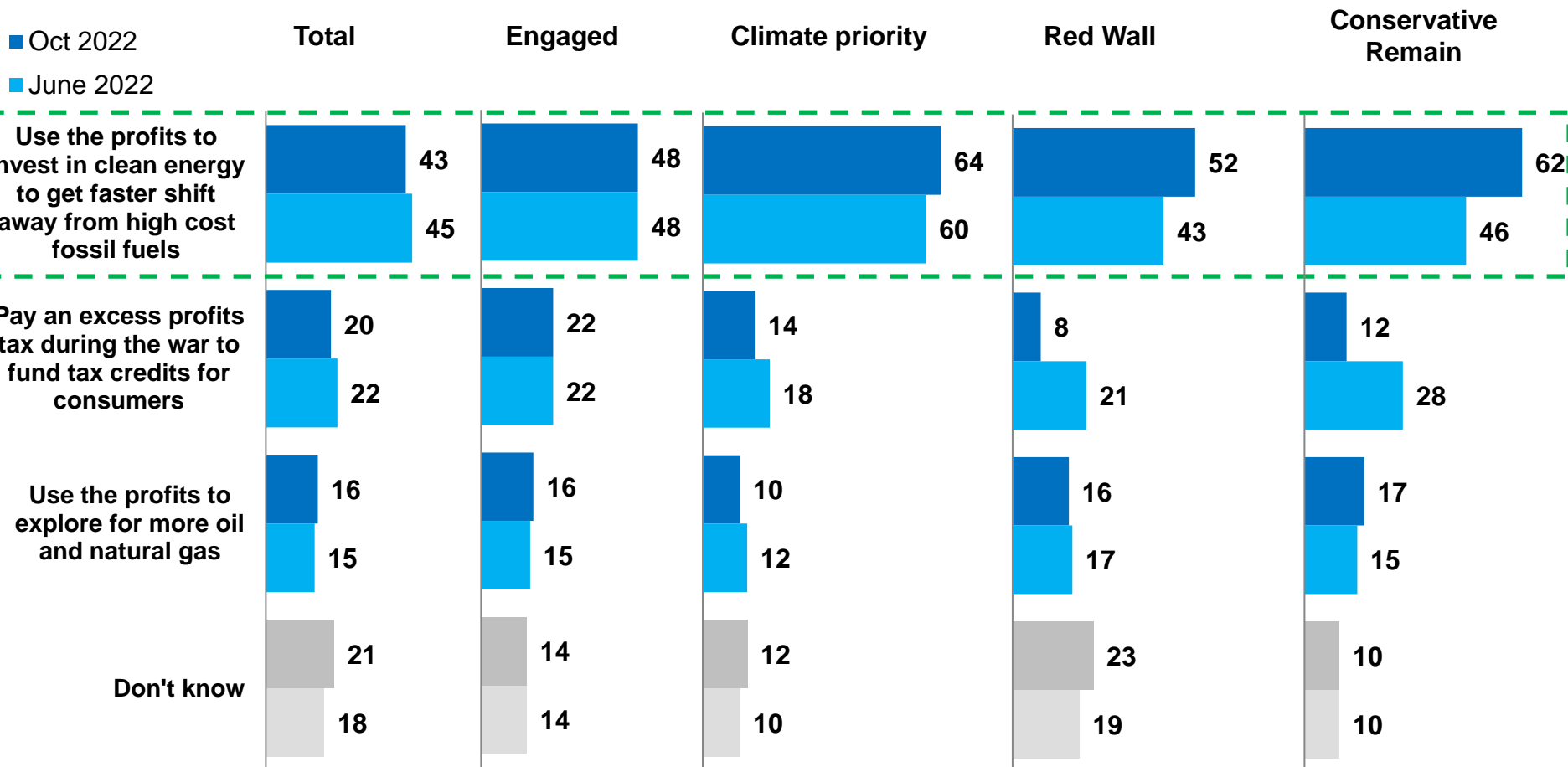
Total, n=2,030; Engaged, n=1,411; Climate Priority, n=423; Red Wall, n=307; Conservative Remain, n=151

Strong appetite for current energy profits to go toward investment in clean energy, across all target groups

Approach to oil and energy companies, by target

■ Oct 2022

■ June 2022



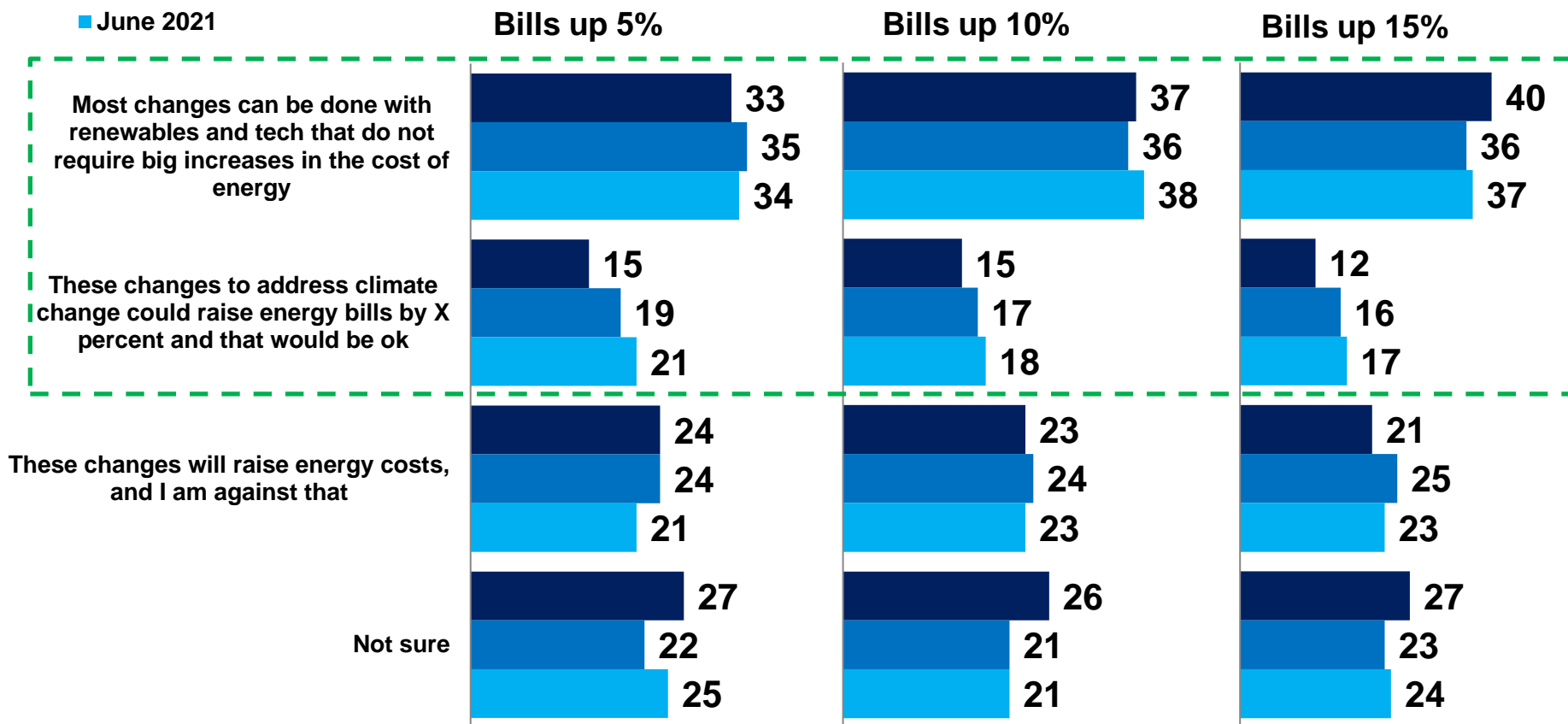
Which ONE is the right approach to oil and energy companies during the energy crisis?

Total, n=2,030; Engaged, n=1,411; Climate Priority, n=423; Red Wall, n=307; Conservative Remain, n=151

Opposition to climate measures on grounds of cost has not increased; plurality or majority expects no change, or would accept higher bill

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

■ Oct 2022 ■ June 2022
■ June 2021



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

Total, n=2,030; each potential rise in bills shown to 1/3-sample splits



Ukraine war and end of Russian energy

Two in three feel government has done too little to find energy sources to replace Russian gas

Reactions to Britain response to war in Ukraine, total sample

■ Too much

■ The right amount

■ Too little

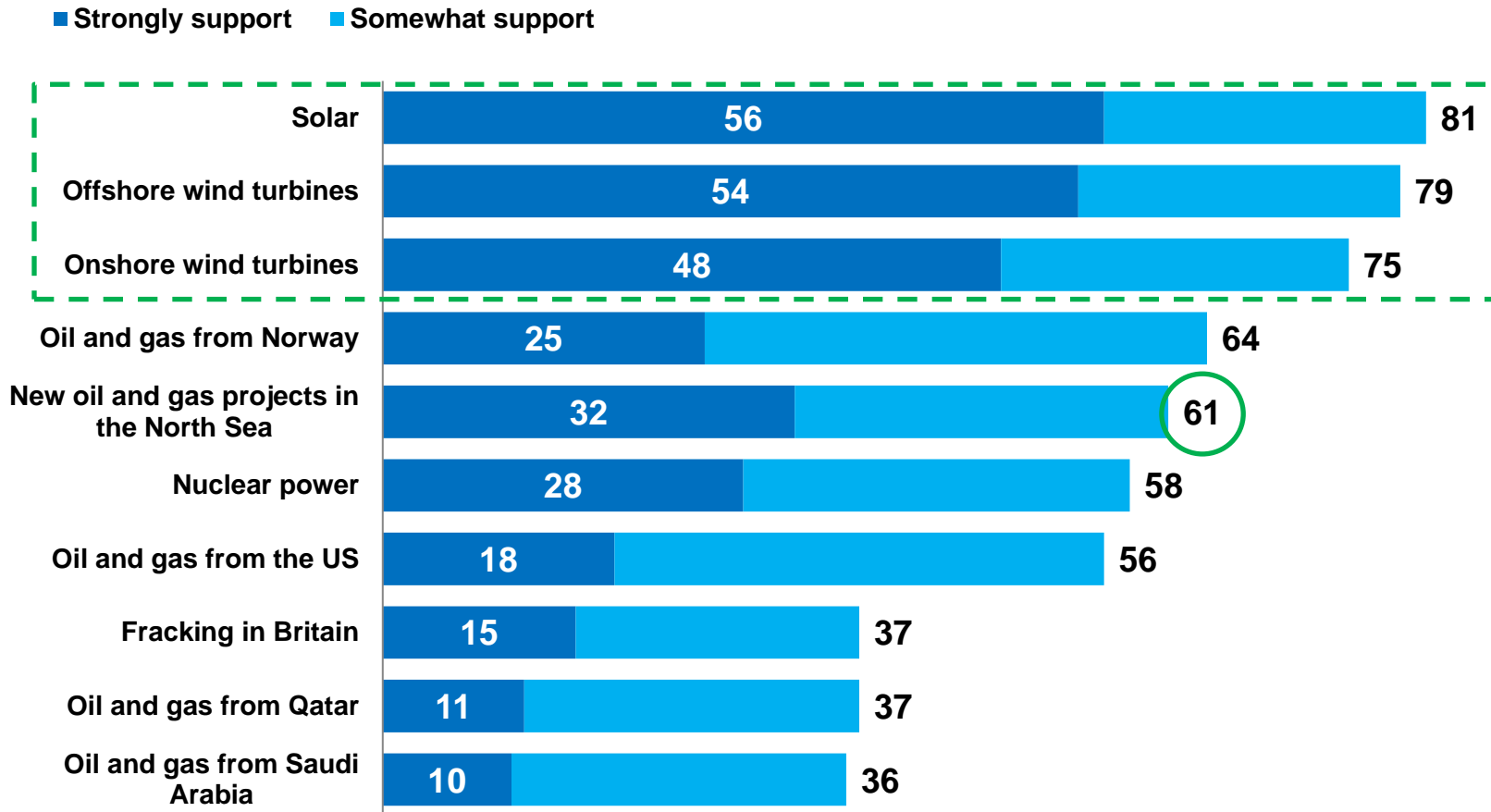


Do you think the British government has done too much, too little, or about the right amount on each of the following?

Total, n=2,030

Britons strongly favor renewables as replacement for Russian oil and gas, but North Sea also has majority support

Replacements for Russian oil and gas, total sample

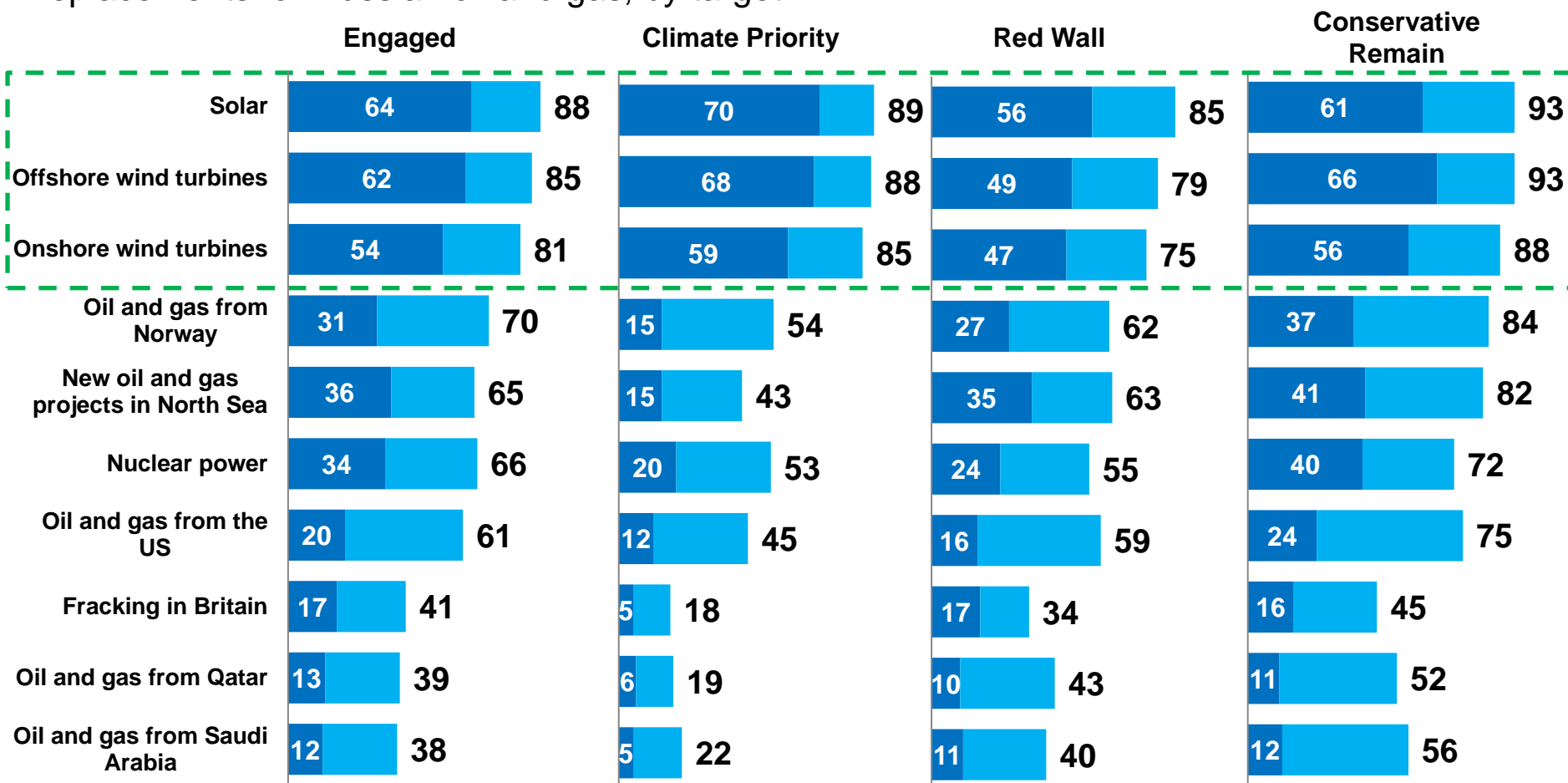


Do you support or oppose using energy from each of the following to replace Russian oil and gas?

Total, n=2,030

All targets favor renewable energy sources to replace Russian fuels

Replacements for Russian oil and gas, by target



Do you support or oppose using energy from each of the following to replace Russian oil and gas?

Total, n=2,030; Engaged, n=1,411; Climate Priority, n=423; Red Wall, n=307; Conservative Remain, n=151

Every group takes a clear view that the Russia-Ukraine crisis shows the value of transitioning to clean energy

1) The Russian invasion of Ukraine will mean western democracies working to get energy security and independence from Russia. It also showed the value of transitioning as quickly as possible to clean, renewable energy.

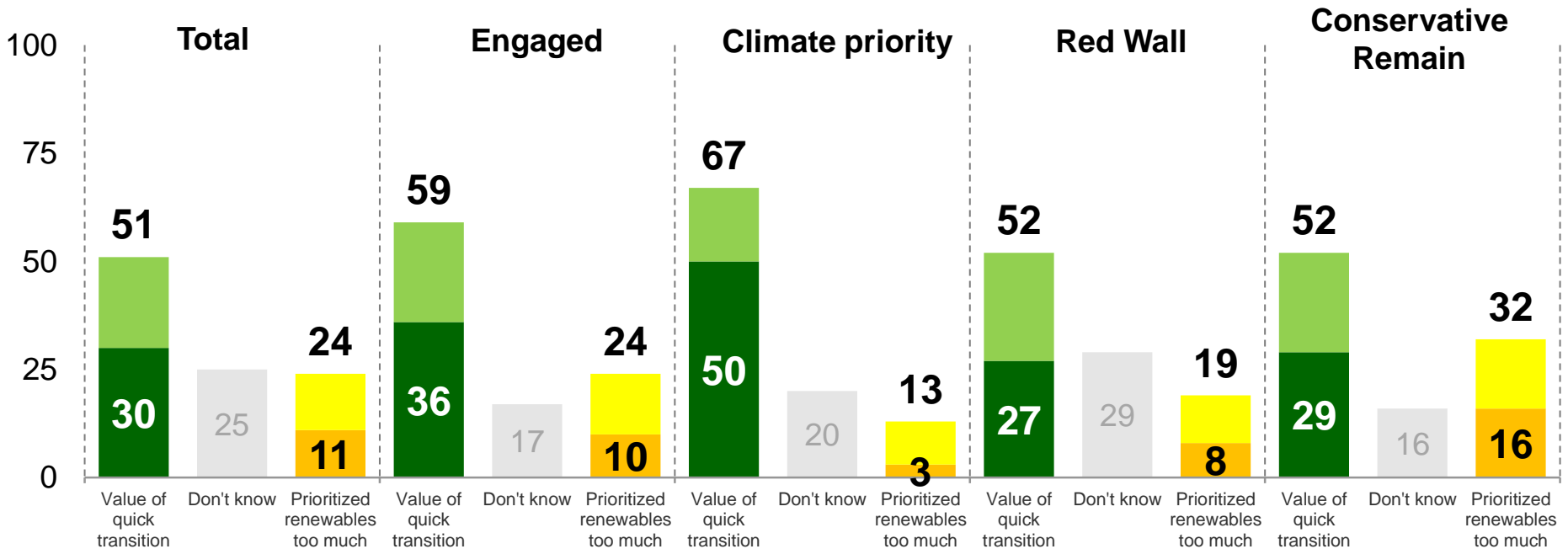
2) The Russian invasion of Ukraine will mean the western democracies working together to get energy security and independence from Russia. It also showed we prioritized renewable energy too much.

■ Statement 1, much closer

■ Statement 1, somewhat

■ Statement 2, much closer

■ Statement 2, somewhat



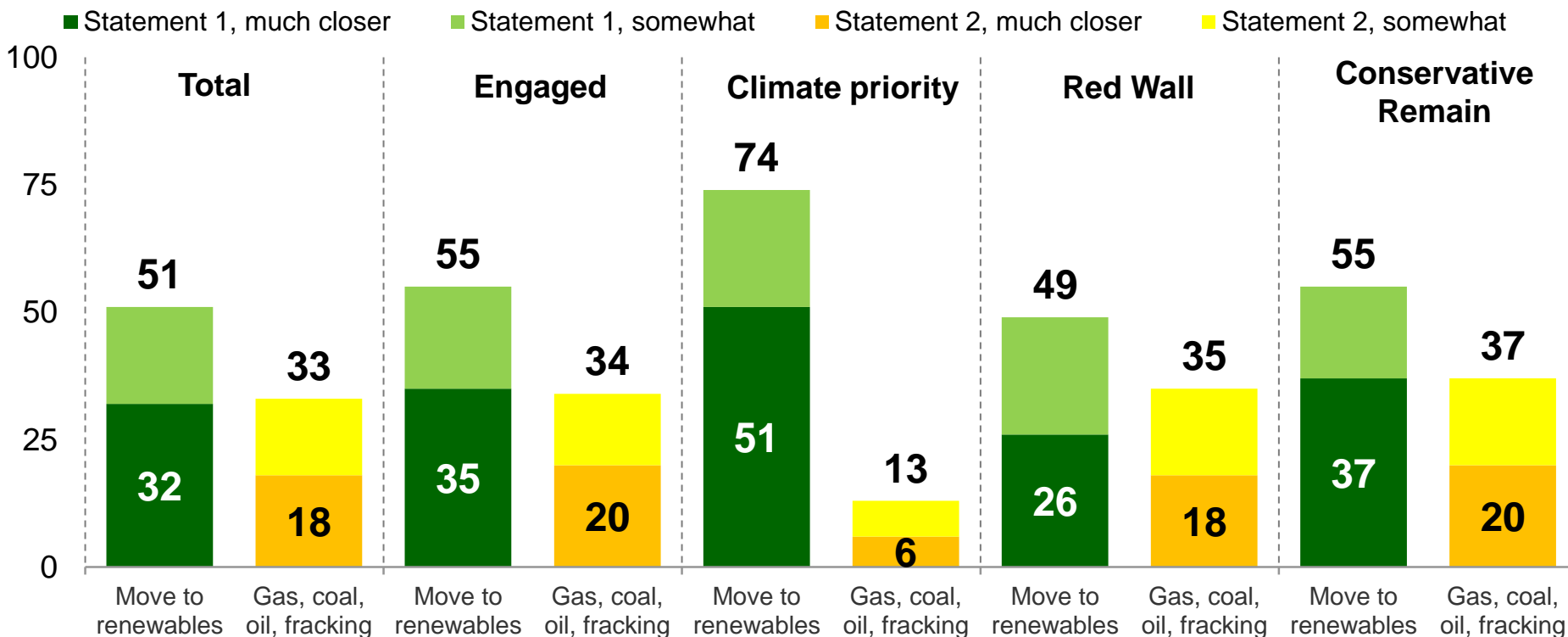
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Shown to ½-sample splits: Total, n=1,015; Engaged, n=705; Climate priority, n=212; Red Wall, n=153; Conservative Remain, n=76

If fracking is part of the domestic mix, all groups prefer a straight switch from Russian energy to renewables

1) With our stopping energy imports from Russia, we should increase efforts to move quickly to renewable power that addresses climate change and doesn't have to be imported from unstable countries.

2) With our stopping energy imports from Russia, we should exploit our domestic natural gas, coal and nuclear energy resources, including fracking where there is local consent, as well as renewables to achieve energy security.

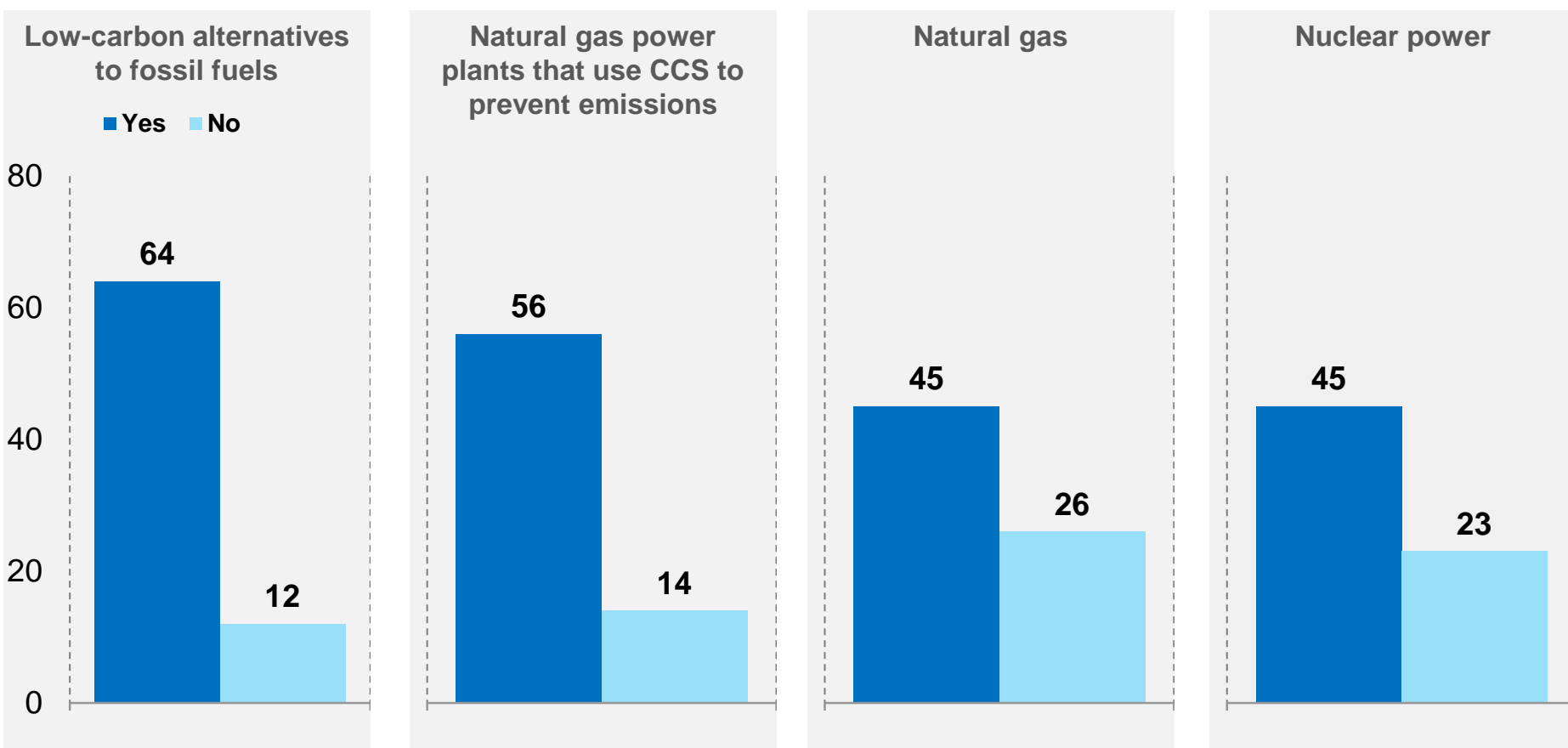


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Britons are open to nuclear power and natural gas as sustainable investments

What should be included in definition of “sustainable investments”, total sample



Do you think that investments in the following types of power generation should be considered "sustainable investments" by the government?

Total, n=2,030

Majorities support increased LNG imports and North Sea oil and gas exploration, low appetite for fracking

Support for government response to war in Ukraine, total sample

■ Strongly support ■ Support somewhat



Do you support or oppose each of the following?

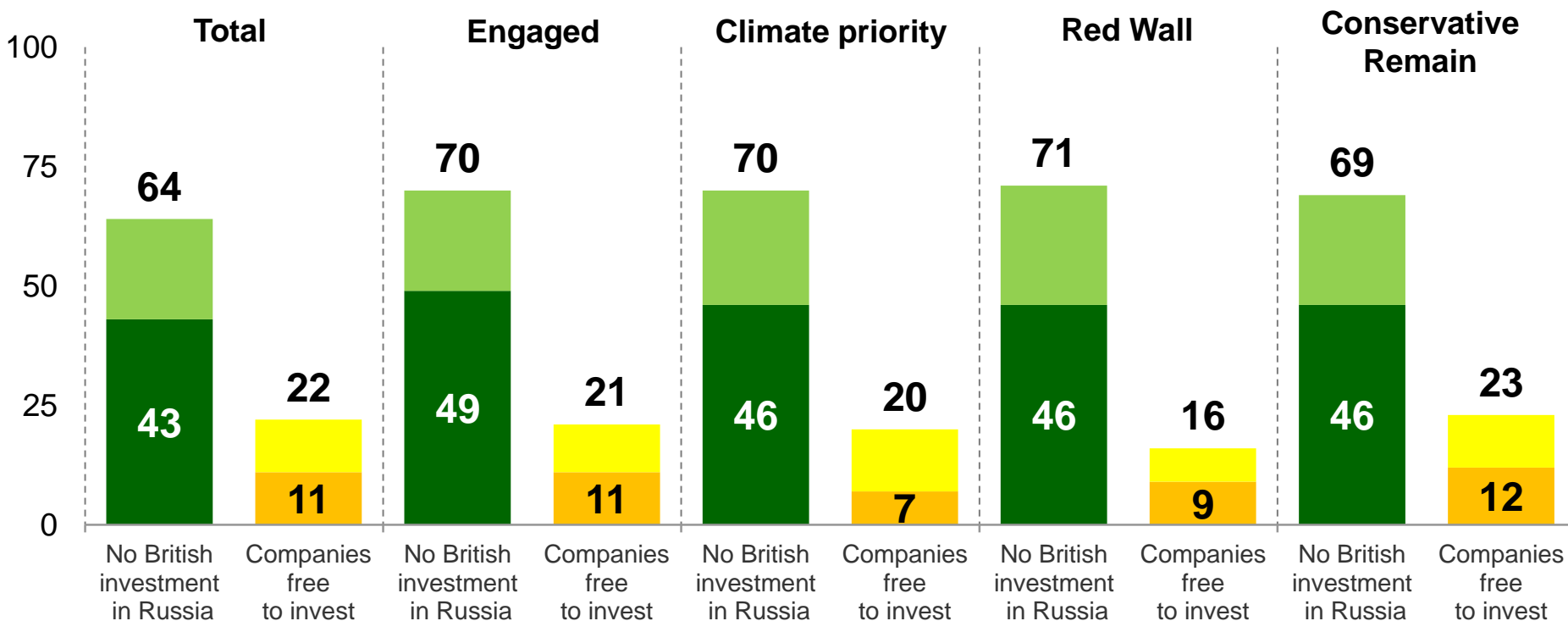
Total, n=2,030

All groups united in opposition to British investment in Russia

1) We should not put money into countries that launch wars of aggression. British companies should be banned from investing in Russia.

2) British companies should be free to make investments as they see fit, it's not the government's place to tell them what to do with their money.

■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat



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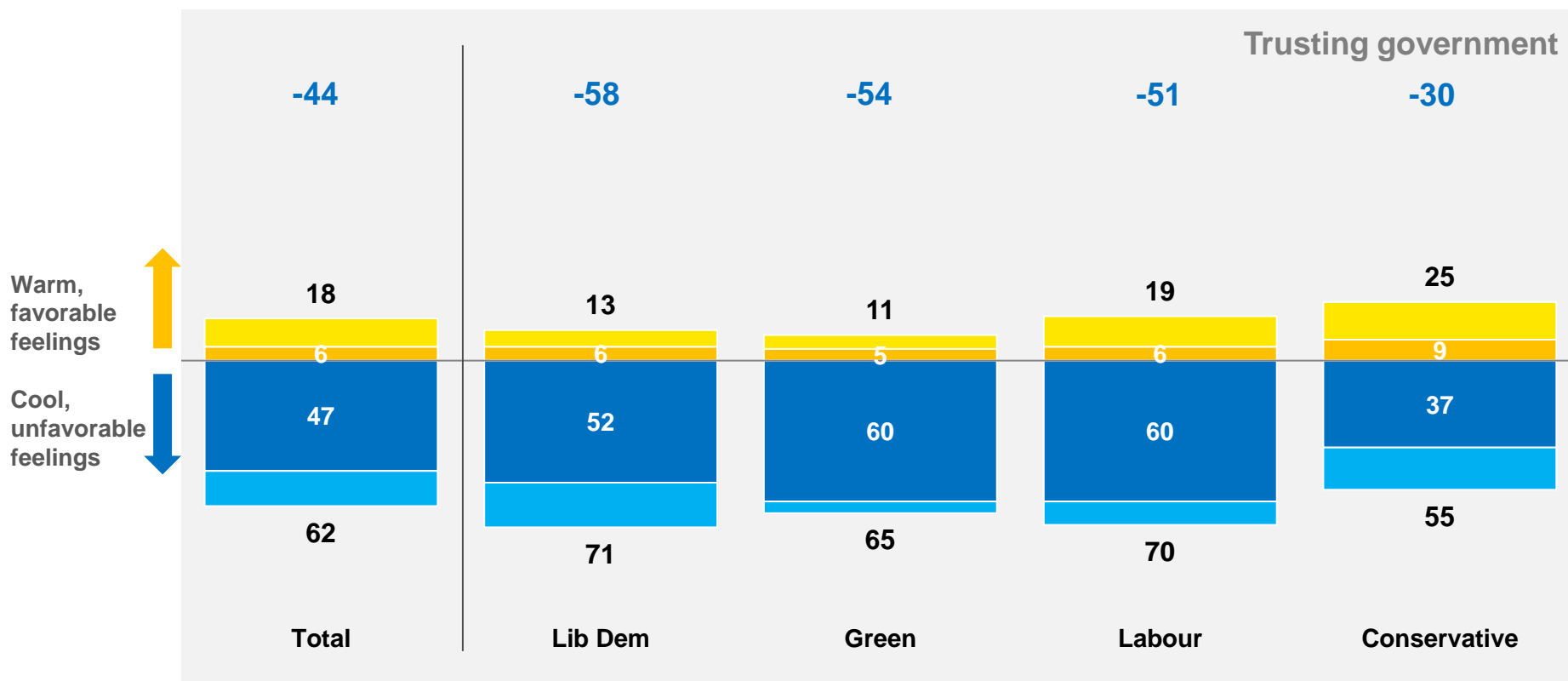
The image shows the interior of the UK House of Commons. It is a large, ornate room with high ceilings, wooden paneling, and galleries for the public. The main floor is filled with rows of green leather benches for Members of Parliament. At the front, there is a central area with a speaker's chair and a table. The room is lit by large windows and several hanging lanterns. The text "Government climate policies" is overlaid in white on a green line.

Government climate policies

Very few feel positive about trusting government, with even Conservative voters split 25-55 against

Trusting government, by vote

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



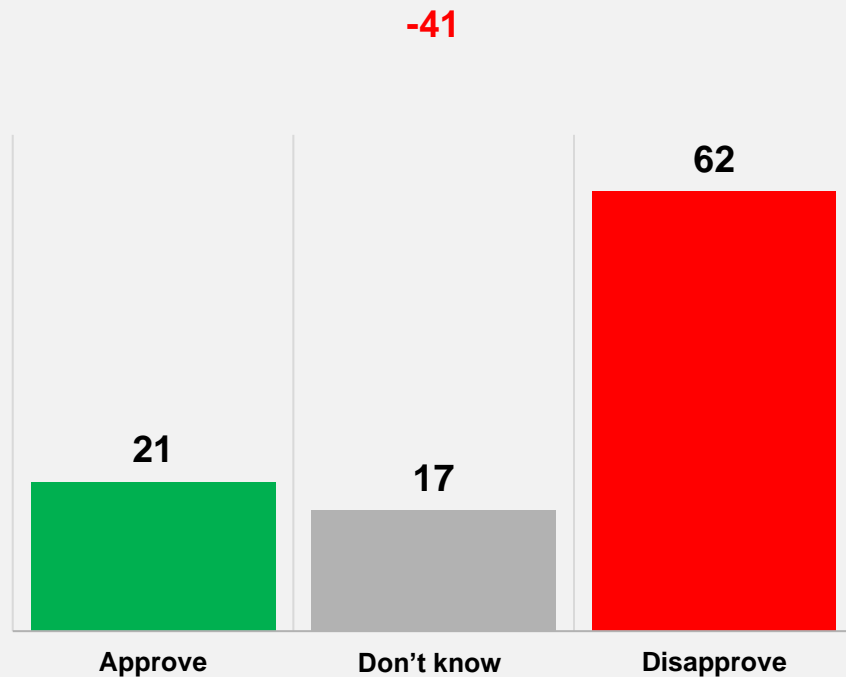
Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVORABLE feeling; zero meaning a VERY COLD, UNFAVORABLE feeling; and fifty meaning not particularly warm or cold.

Total, n=2,030; 2019 vote: Labour, n=473; Conservative, n=640; Liberal Democrats, n=169; Green, n=39

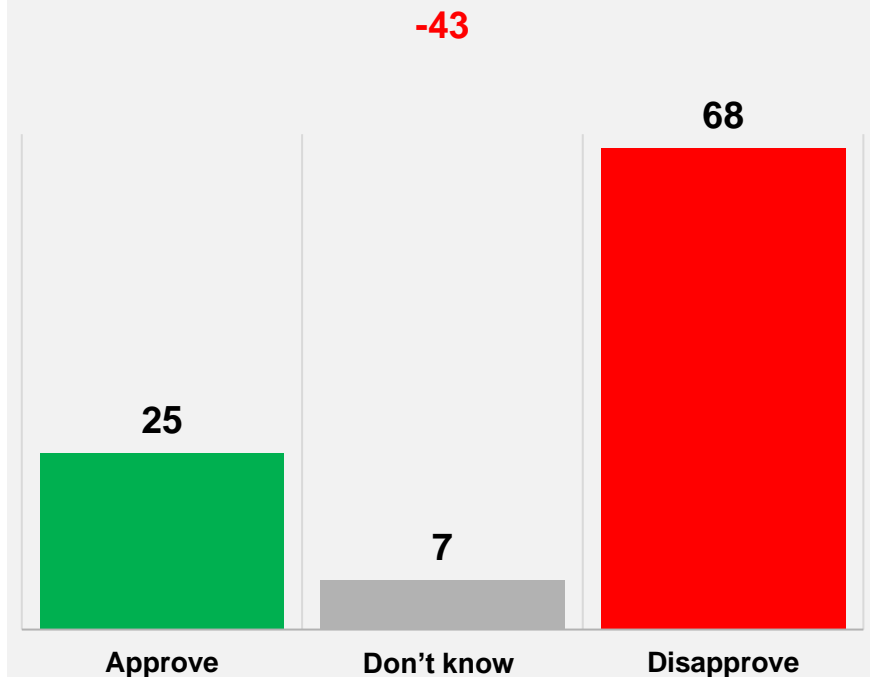
Very low approval of government on climate and energy price crises

Approval of government on climate and energy, total sample

How the government is handling climate change, the environment and energy transition



How the government is handling the energy price crises in gas and power

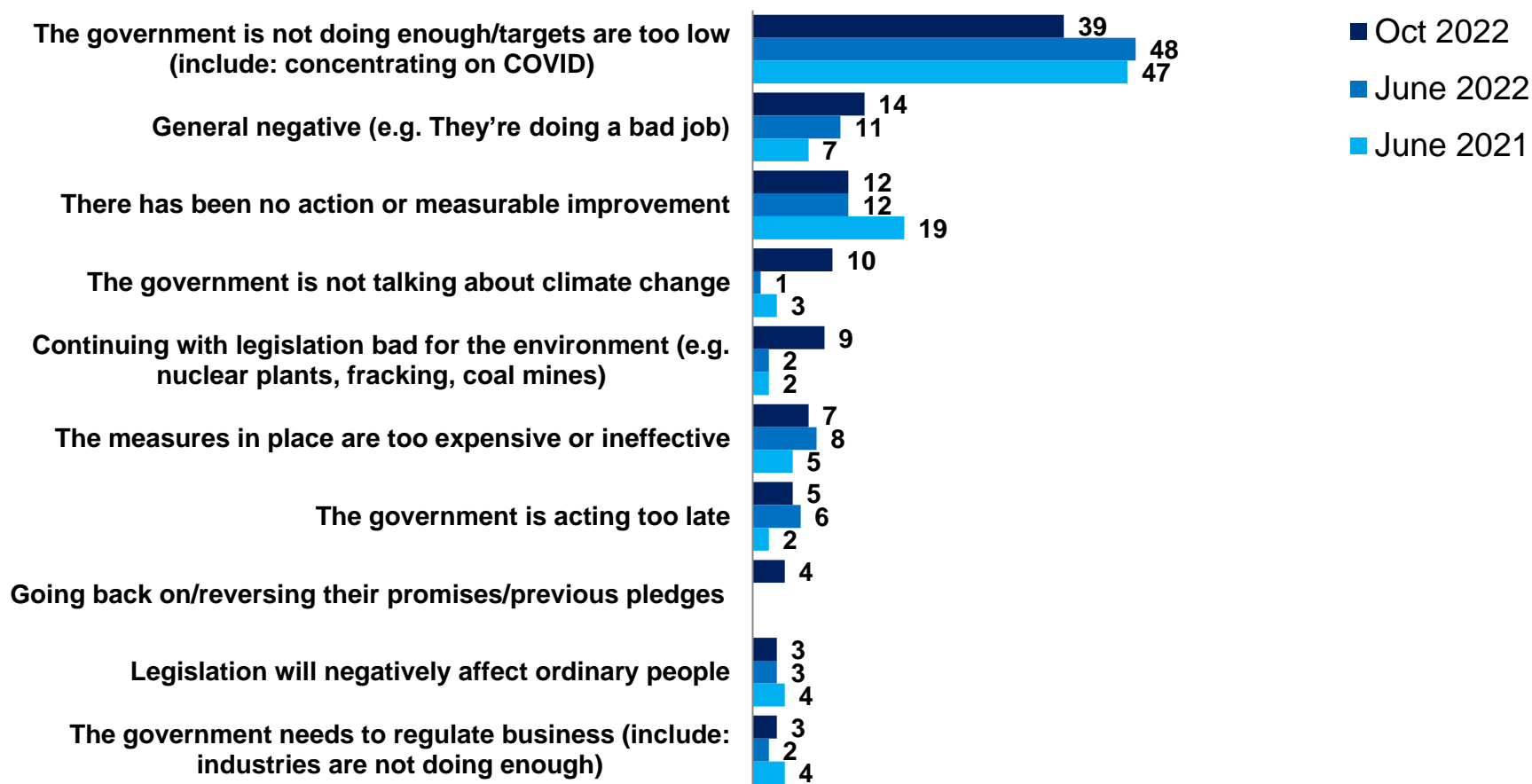


Do you approve or disapprove of the way Liz Truss is handling her job as Prime Minister/the following issues facing the country?

Total, n=2,030

Top criticism of government climate handling is still not doing enough/ambitious enough

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

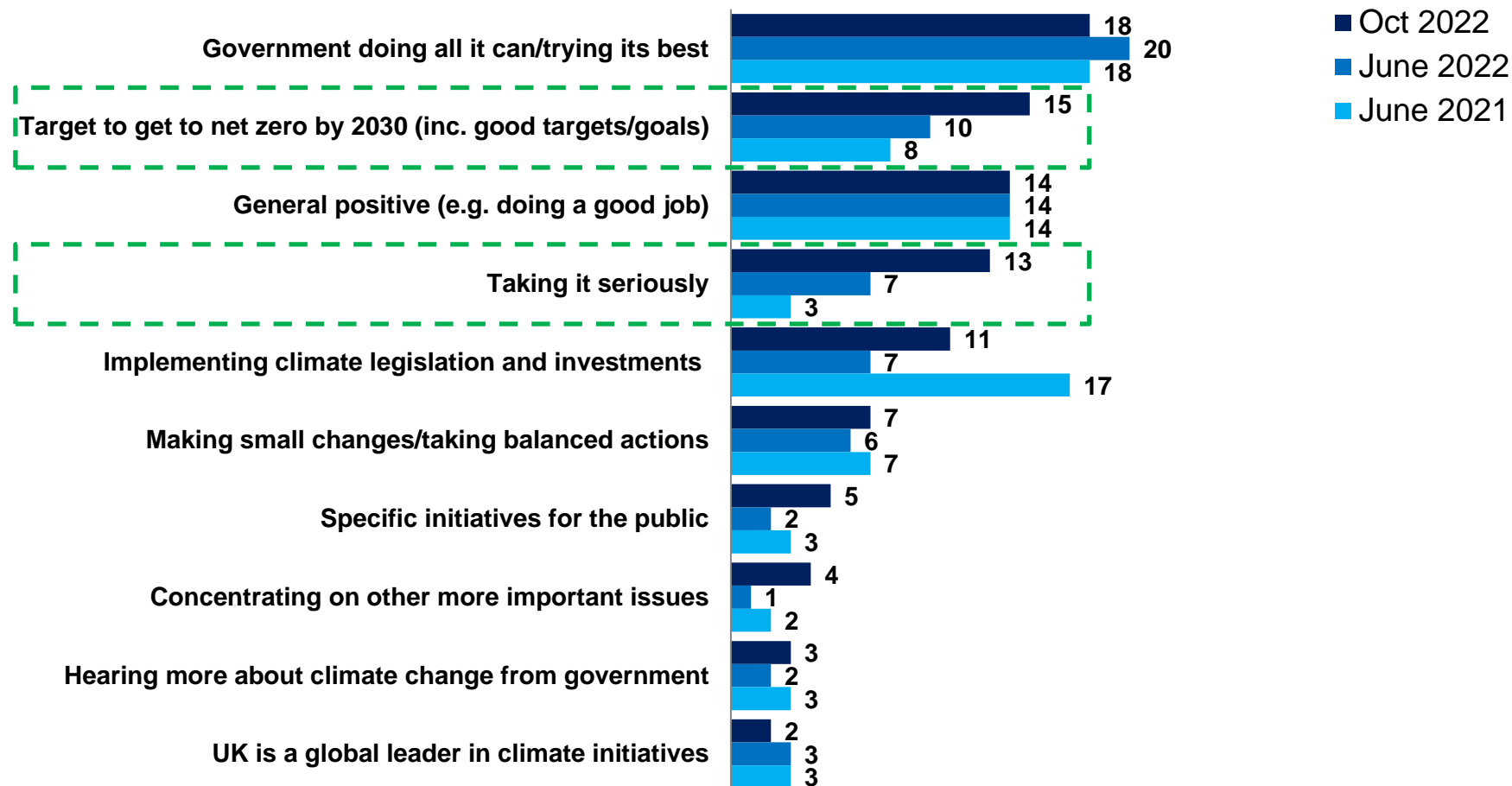


Why do you disapprove of how the government is addressing climate change, the environment and energy transition?

Total sample, n=1,537

Among small group who approve, increased awareness of targets/goals for climate, and view that it's being taken seriously

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

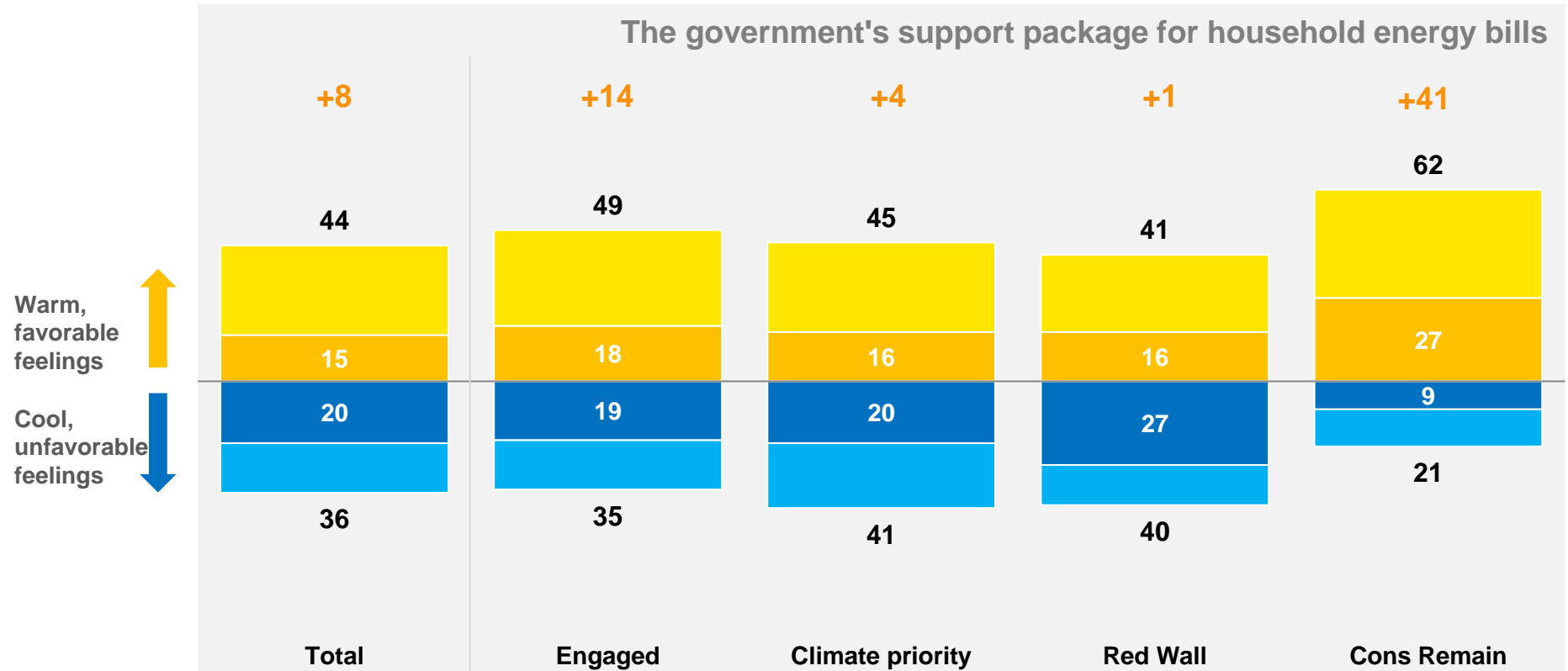


Why do you approve of how the government is addressing climate change, the environment and energy transition?

Most targets slightly warm to government's bills support package – and Conservative Remain voters are very favorable

Feelings toward government support package on household energy, by target

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



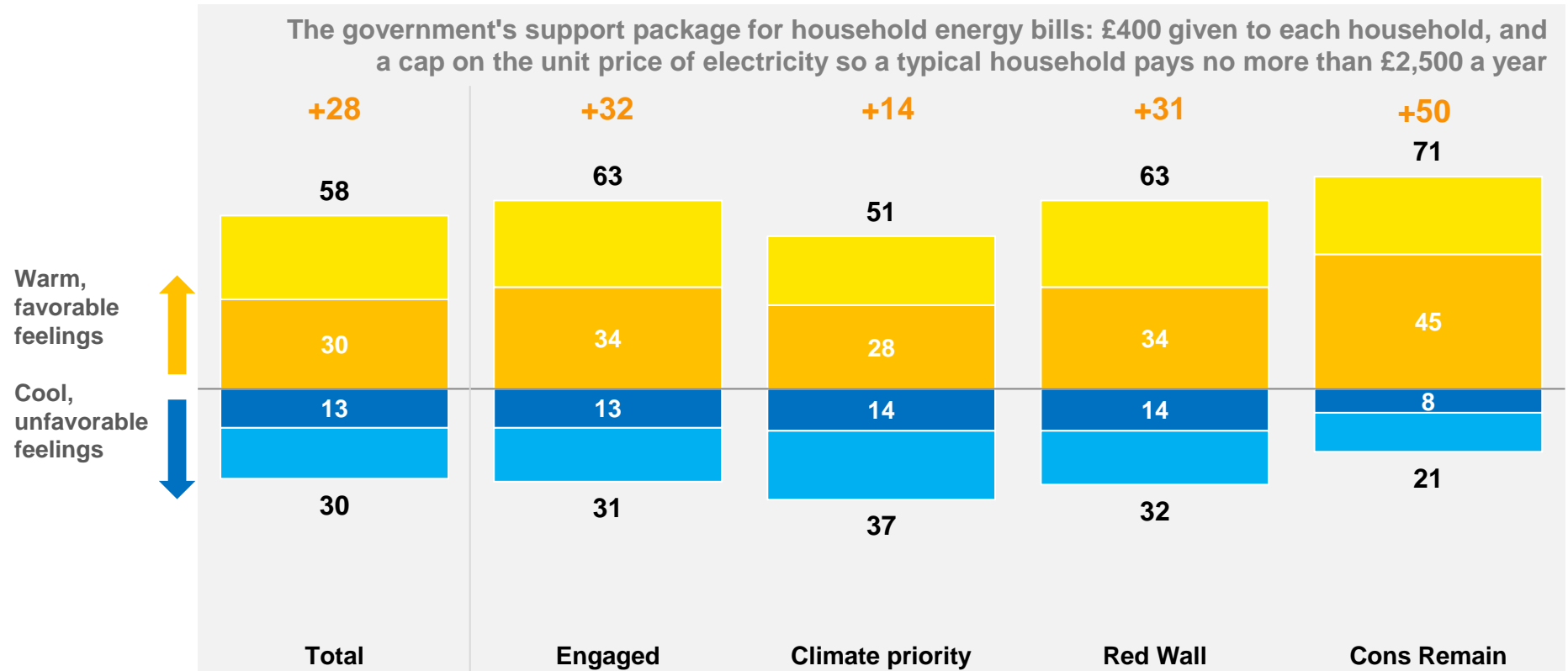
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Items shown to ½-sample splits: Total, n=1,015; Engaged, n=705; Climate priority, n=212; Red Wall, n=153; Conservative Remain, n=76

Giving people detail about the energy support package boosts favorability, leading to big majorities across groups

Feelings toward government support package on household energy, by target

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



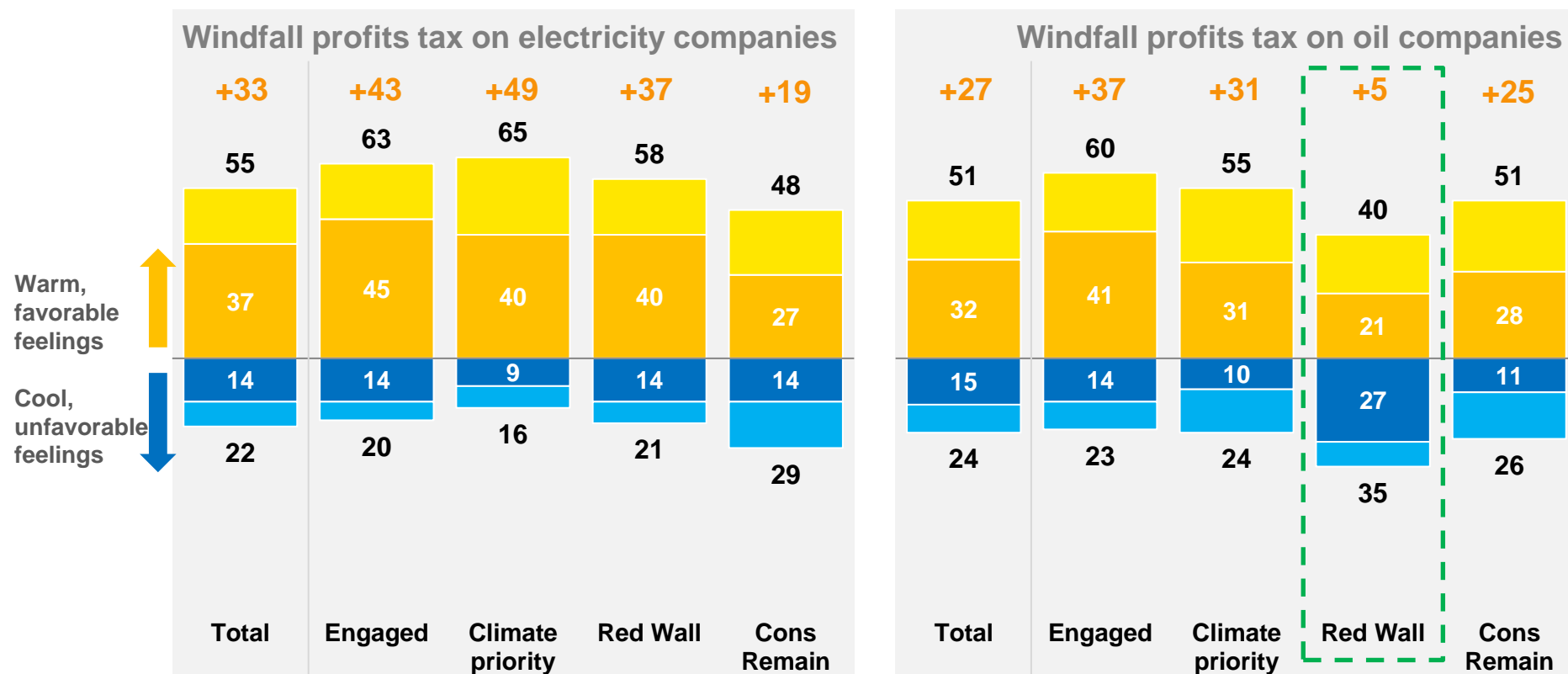
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Windfall taxes, especially on electricity companies, very popular – but Red Wall voters are lukewarm on taxing oil companies

Feelings toward windfall taxes, by target

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

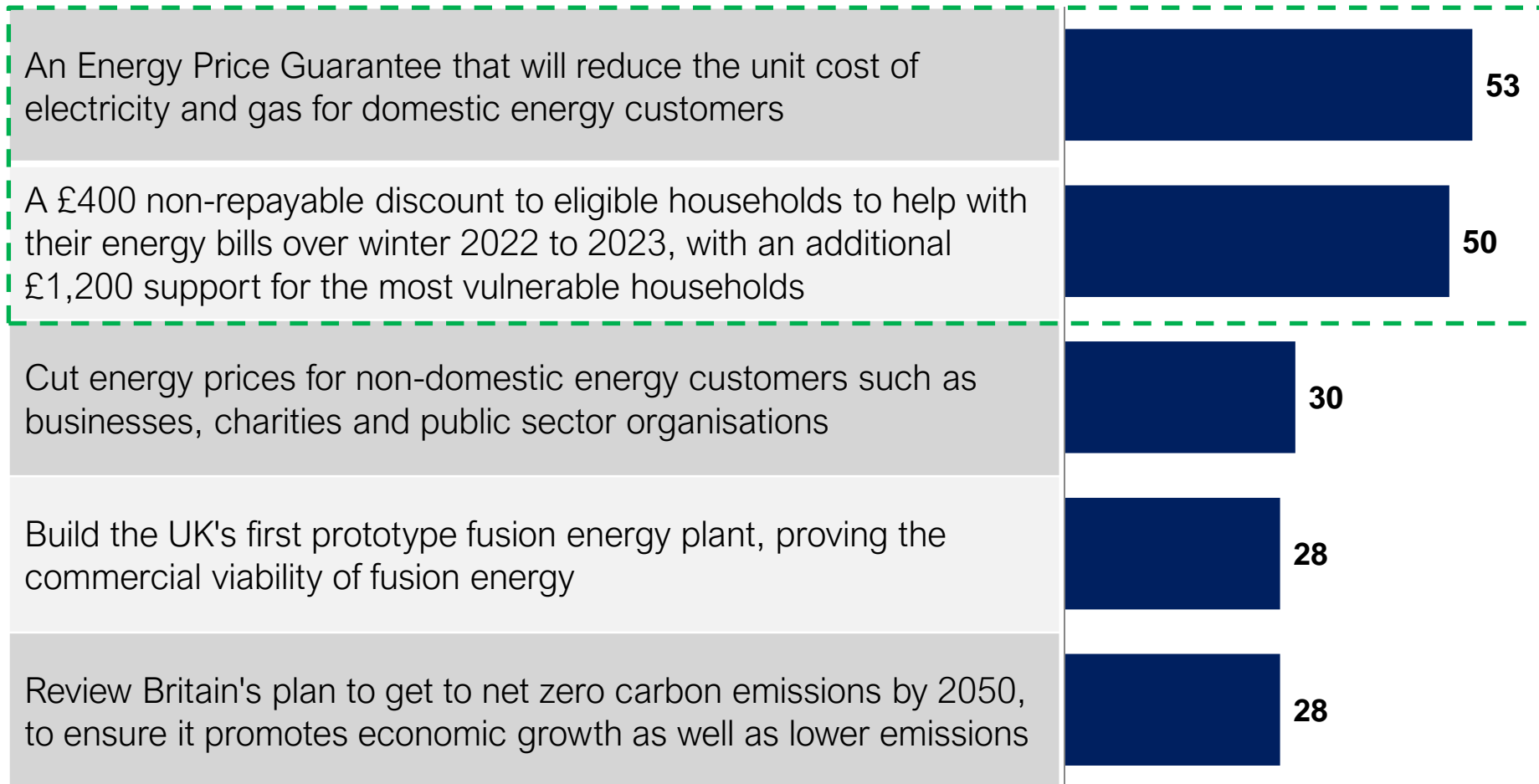


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Items shown to ½-sample splits: Total, n=1,015; Engaged, n=705; Climate priority, n=212; Red Wall, n=153; Conservative Remain, n=76

Most important government policies reduce costs for households: Energy Price Guarantee and £400 energy bill discount

Importance of government climate policies, total sample



Lifting moratorium on fracking is government's least popular policy, along with CCS and "investment zones"

Importance of government climate policies, total sample

A temporary suspension of environmental and social costs (including green levies) from being passed onto consumer bills

26

Move ahead with carbon capture and storage for fossil fuel burning power plants

16

Provide tax cuts and relax planning restrictions including environmental regulations in new "investment zones" across the country

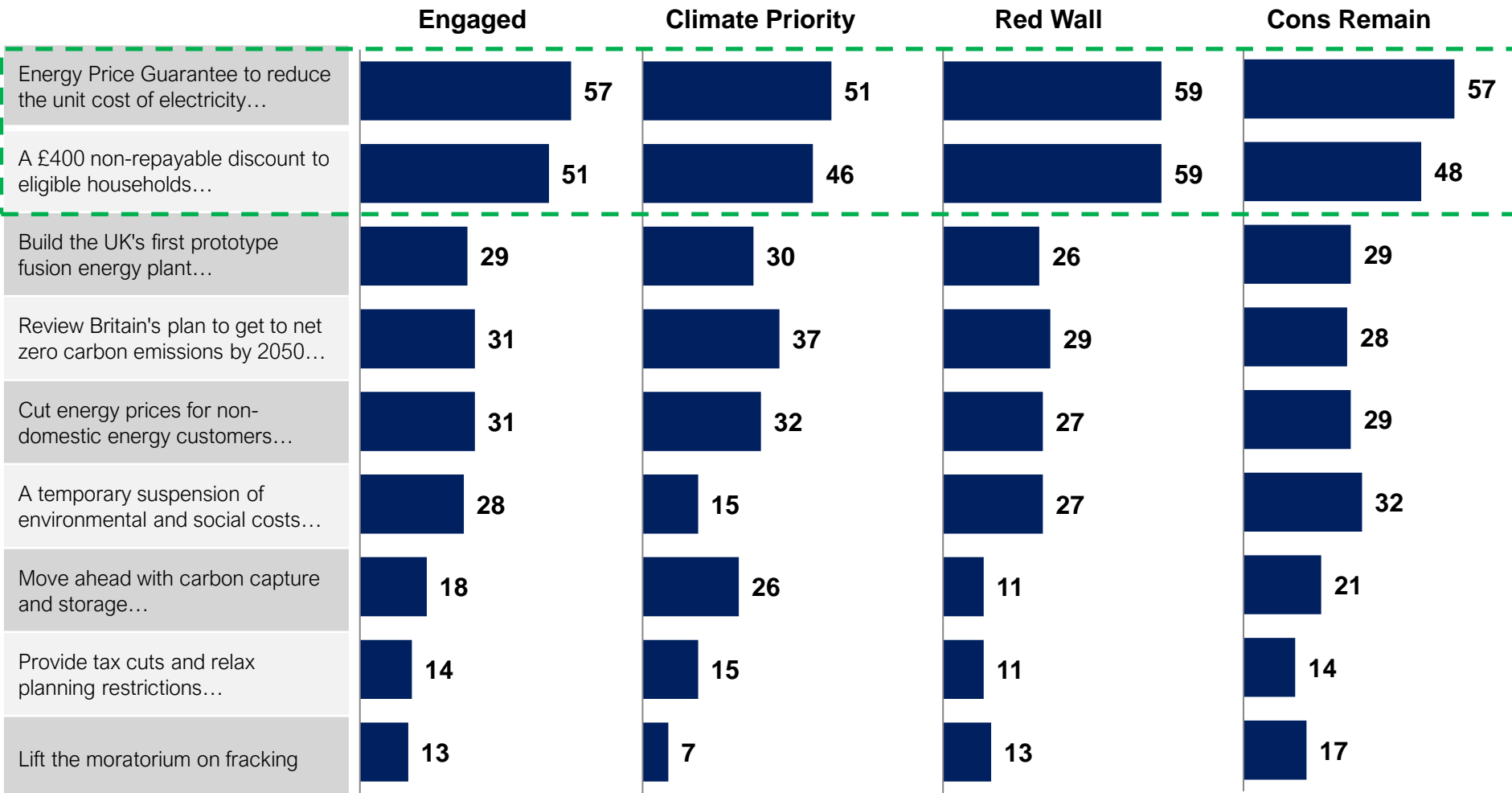
15

Lift the moratorium on fracking

13

All targets are enthusiastic about the Energy Price Guarantee and £400 energy bill discount

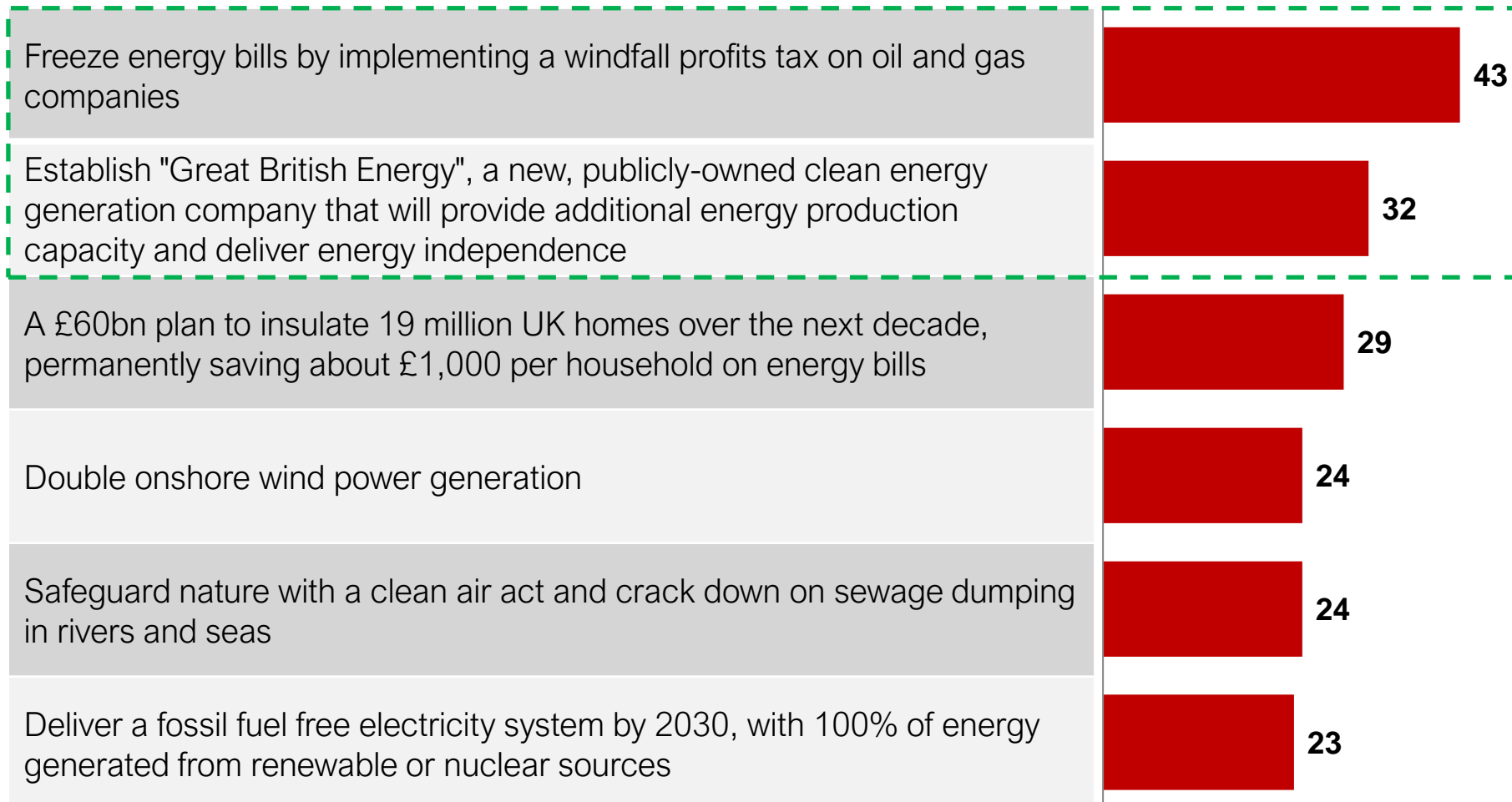
Importance of government climate policies, by target



Total, n=2,030; Engaged, n=1,411; Climate priority, n=423; Red Wall, n=307; Conservative Remain, n=151

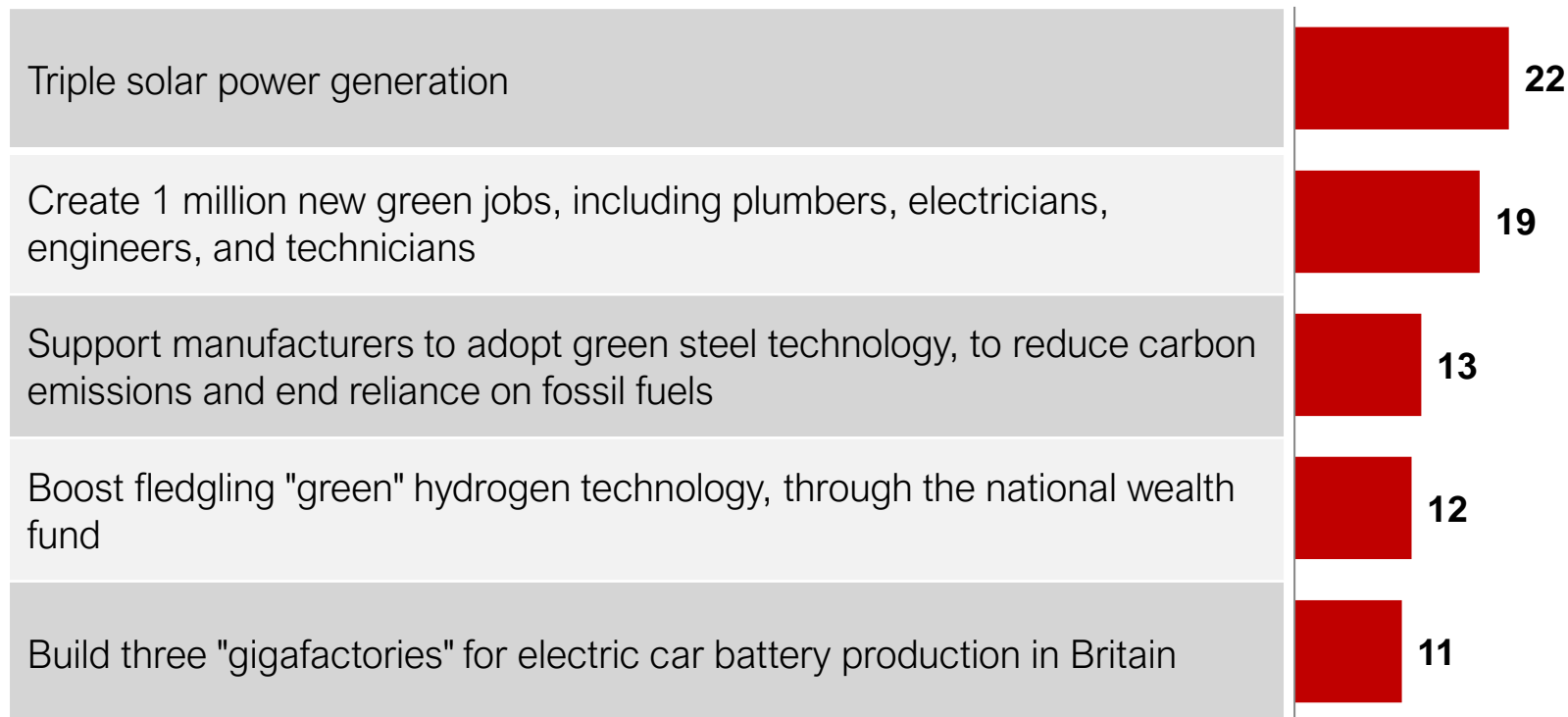
Top Labour policies: freezing energy bills through a windfall tax, and establishment of Great British Energy

Importance of climate policies from the Labour Party, total sample



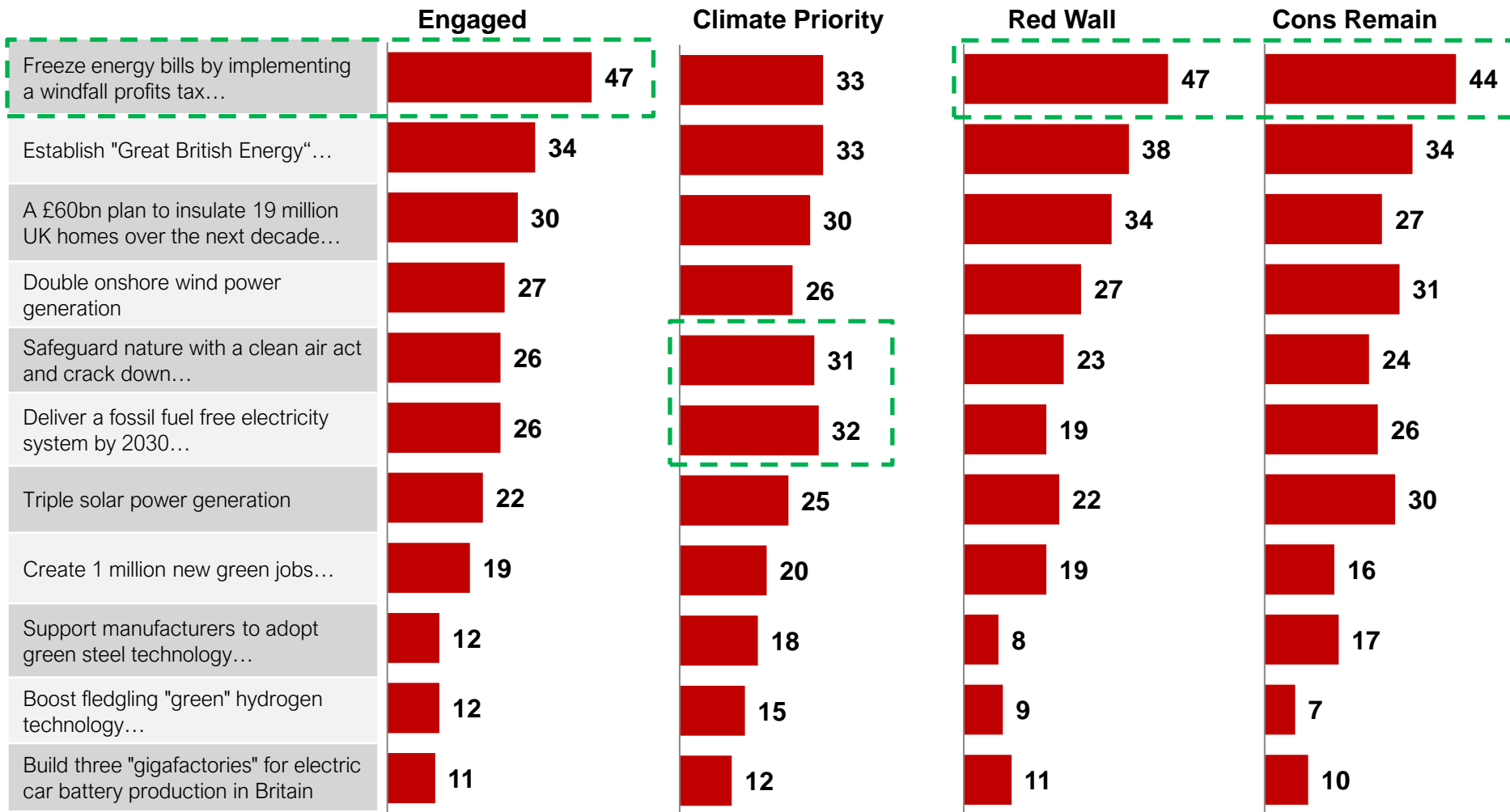
Labour policies gaining least support: green steel tech, green hydrogen and battery factories

Importance of climate policies from the Labour Party, total sample



Freezing energy bills via windfall tax preferred by most targets, but Climate Priority also like clean air act and carbon-free electricity

Importance of climate policies from the Labour Party, by target



Total, n=2,030; Engaged, n=1,411; Climate priority, n=423; Red Wall, n=307; Conservative Remain, n=151

The image shows the front entrance of 10 Downing Street, a famous residence in London. The central feature is a black door with a gold knocker and a small gold plaque. Above the door is a semi-circular transom window with a decorative leaded glass pattern. The door is framed by a light-colored stone archway. A black lantern hangs from the arch above the door. The building's facade is made of dark blue or black bricks. On either side of the door are large, multi-paned windows with white frames. A black wrought-iron fence runs along the front of the property. The number '10' is visible above the door.

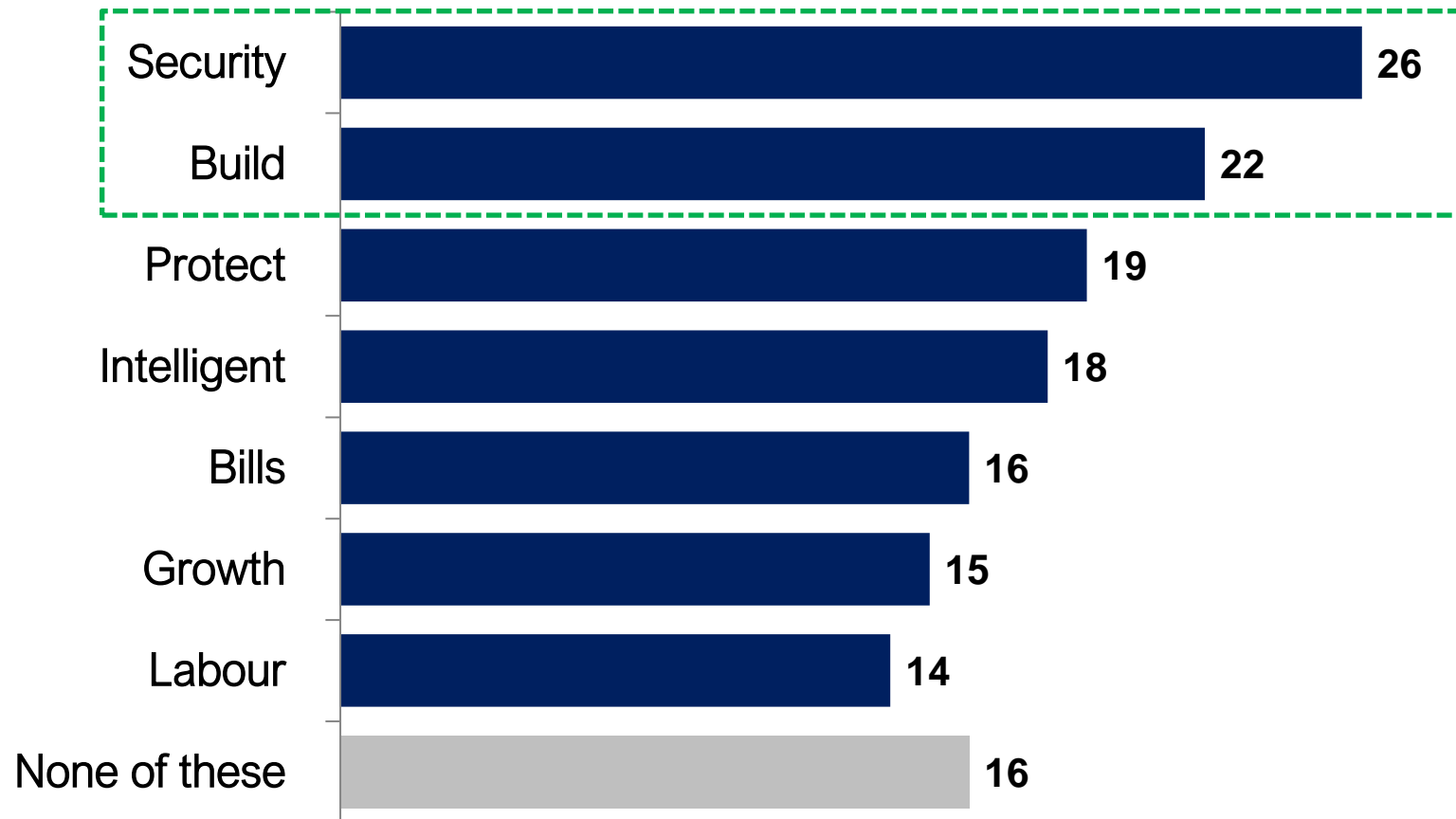
Political Messaging¹⁰ on Climate

Political messages from the government: full wording

Security	We are facing a global crisis because the West became dependent on authoritarian regimes for cheap energy. So, we are reinforcing our energy security: more gas fields in the North Sea, more renewables and nuclear energy. That is how we will deliver net zero, energy security, and tackle climate change.
Build	The real heroes are those who go to work, take responsibility and aspire to a better life for themselves and their family. We are on their side. We will build roads, rail, energy and broadband quicker. We are proudly pro-growth, pro-aspiration and pro-enterprise. We are focused on boosting opportunity across our country.
Protect	We understand the pressures businesses face with their energy bills, which is why we are supporting them this winter and protecting jobs and livelihoods. As we are doing for consumers, our new scheme will keep their energy bills down from October. At the same time, we are boosting Britain's homegrown energy supply to ensure greater energy security for us all.
Intelligent	We need intelligent greenery not religious zealotry. We are moving ahead with carbon capture and storage, expanding the world's biggest windfarm and developing hydrogen and nuclear. We will also build the UK's first prototype fusion energy plant by 2040, capable of putting energy on the grid, proving the viability of fusion energy to the world.
Bills	When I entered Downing Street, energy bills were predicted to soar above £6,000 a year. Families would have been unable to heat their homes. So, acted to make sure the typical household bill shouldn't be more than £2,500 a year. We are doing more in this country to protect people from the energy crisis than any other country in Europe.
Growth	We are committed to Net Zero by 2050. But the green agenda does not mean poverty. It does not contradict the growth agenda. We will go green in a way that makes the British people better off not worse off, drives growth instead of hindering it, and levels-up, by boosting industries in our regions instead of imposing costs that drive them to the brink of ruin.
Labour	Labour wants more tax on the companies we need to invest in our energy security. In Wales they are cancelling road-building projects. They have no long-term plan or vision for Britain, just tax rises and central controls on industry. They are prepared to leave our towns and cities facing decline.

Standout government message emphasizes energy security through domestic production, renewables and nuclear

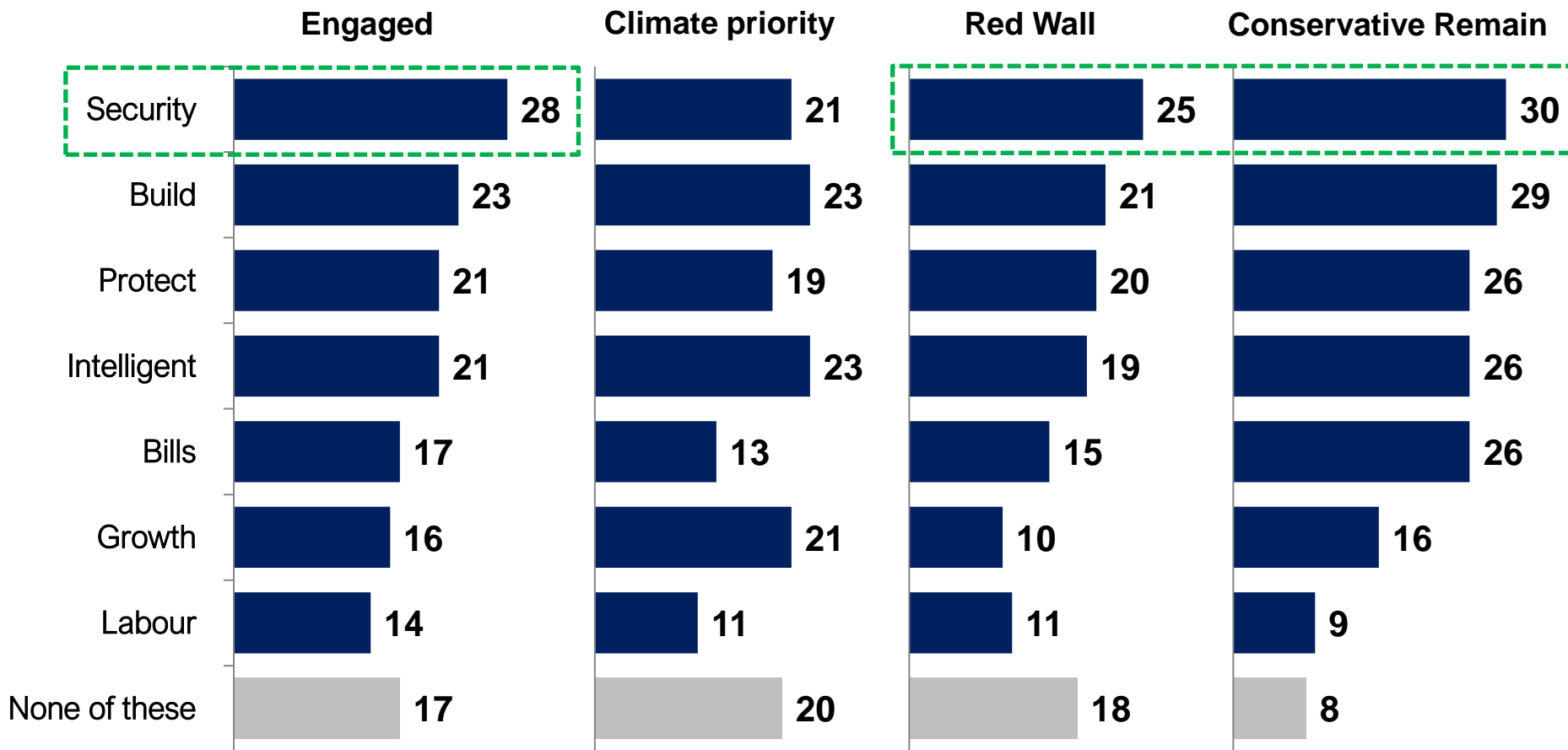
Government messages, total sample



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

Energy security fairly strong with Engaged, Red Wall and Conservative Remain; Climate Priority don't like much

Government messages, by target



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

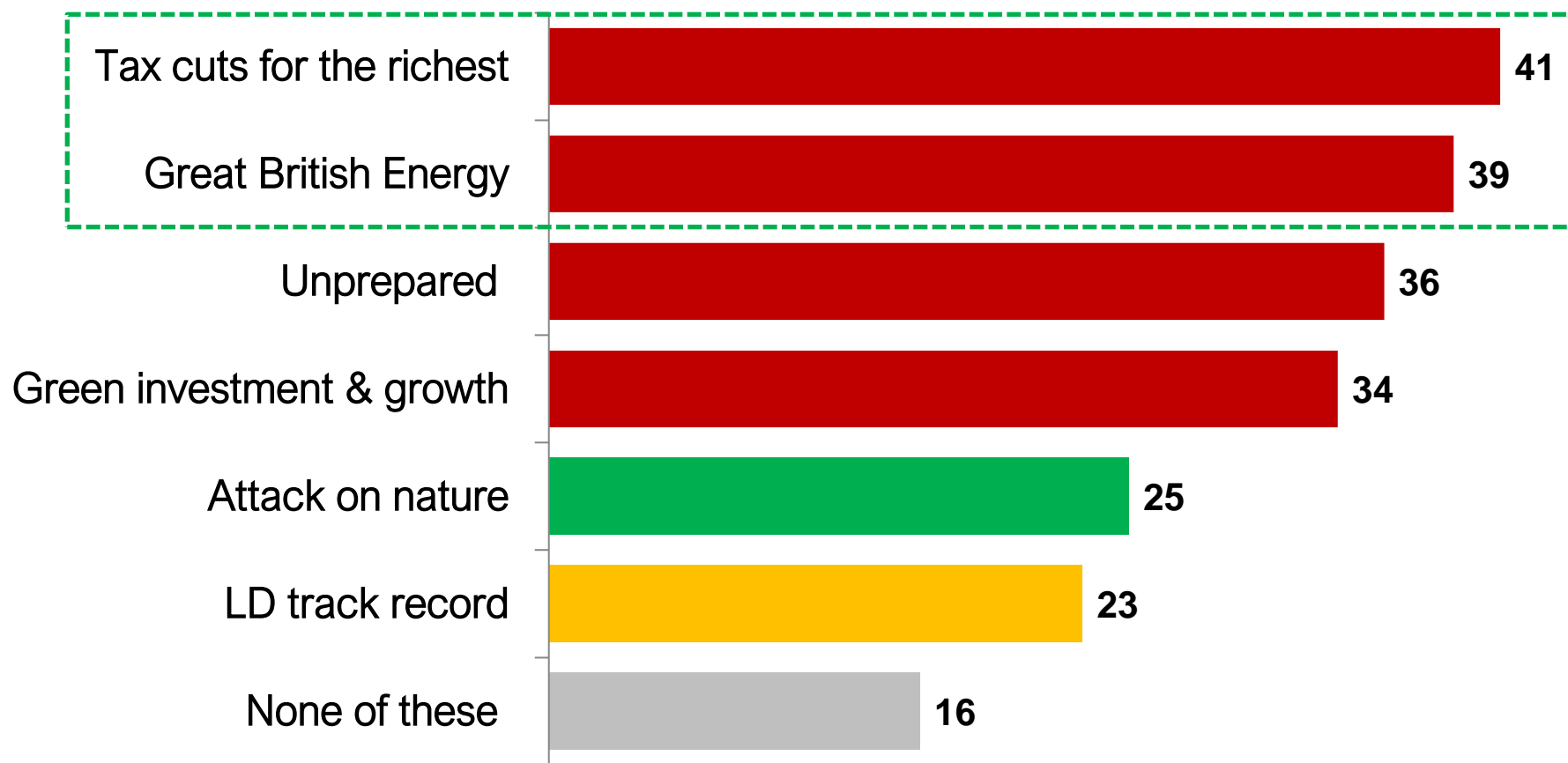
Engaged, n=1,411; Climate priority, n=423; Red Wall, n=307; Conservative Remain, n=151

Political messages opposing the government: full wording

Tax cuts for the richest	Labour says: Tories lost control of the British economy. Not for you, not for working people, for tax cuts for the richest 1% in our society. Trickle-down economics doesn't work. Britain won't be better off just because we make the rich, richer. The Tories aren't prepared to do the hard yards on growth. But we will.
Great British Energy	Labour says: The largest onshore wind farm in Wales is owned by Sweden. Five million Britons pay their bills to an energy company owned by France. A Labour government will set up the Great British Energy company to build a clean energy system for the future, run by British people.
Unprepared	Labour says: We will never accept that the war is an excuse for how unprepared Britain was to tackle the energy fallout. The war didn't ban onshore wind, the war didn't scrap home insulation, the war didn't stall British nuclear energy. The Tories did that.
Green investment & growth	Labour says: Labour will turn the UK into a green growth superpower, producing one hundred percent clean power by 2030. We will make sure that the public money we spend building-up British industry spurs private investment and stimulates growth so the British people can enjoy the returns.
Attack on nature	The Green Party says: The Government has launched an attack on nature. They are scrapping planning rules that protect nature in new investment zones, ripping up environmental protections introduced by the EU, and withdrawing plans to help farmers protect nature. They dismiss essential environmental protections as burdens.
LD track record	The Liberal Democrats say: Liberal Democrats in Government helped homeowners with subsidies on solar panels and offered 0% interest loans, we were on track toward energy independence a decade ago. This was torn up by the Tories who have left our country at the mercy of Putin.

Labour attack on tax cuts for rich people is strongest, but Great British Energy almost as effective

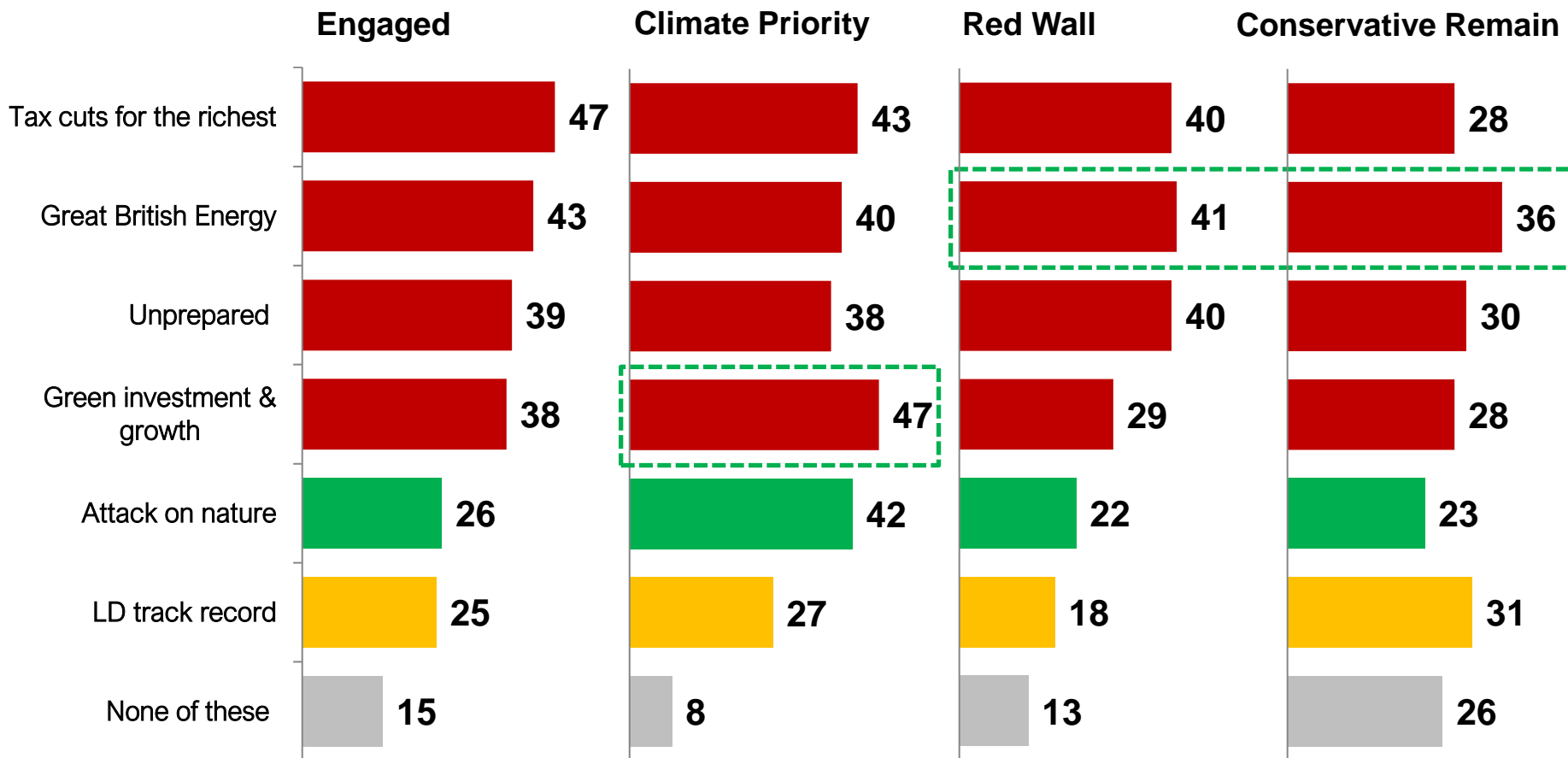
Political messages opposing the government's climate policy, total sample



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

Great British Energy message is the best for Red Wall and Conservative Remain targets; Climate Priority like green growth

Political messages opposing the government's climate policy, by target



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

Engaged, n=1,411; Climate priority, n=423; Red Wall, n=307; Conservative Remain, n=151

Climate-sceptical political messages opposing the government: full wording

Shortages

Richard Tice from Reform UK says: Because 32 of 54 nuclear reactors in France are out of action, they are being allowed to import electricity from the UK. We normally import energy from France in the winter, so we are at risk of gas shortages and rationing is inevitable. This is gross negligence by our leaders.

Drop Net Zero

UKIP says: There is no choice but to drop Net Zero. We don't even have the energy to charge electric cars. But the green lobby is deeply embedded in the establishment and it will not let go without a fight to the death.

Energy bailout

Nigel Farage says: The globalists blame the UK financial crisis on tax cuts. The truth is our government's energy bailout is three times bigger than the tax cuts. Despite our massive reserves of oil, gas, and coal, we don't produce our own energy. This mess is because of energy.

No taxes on energy companies

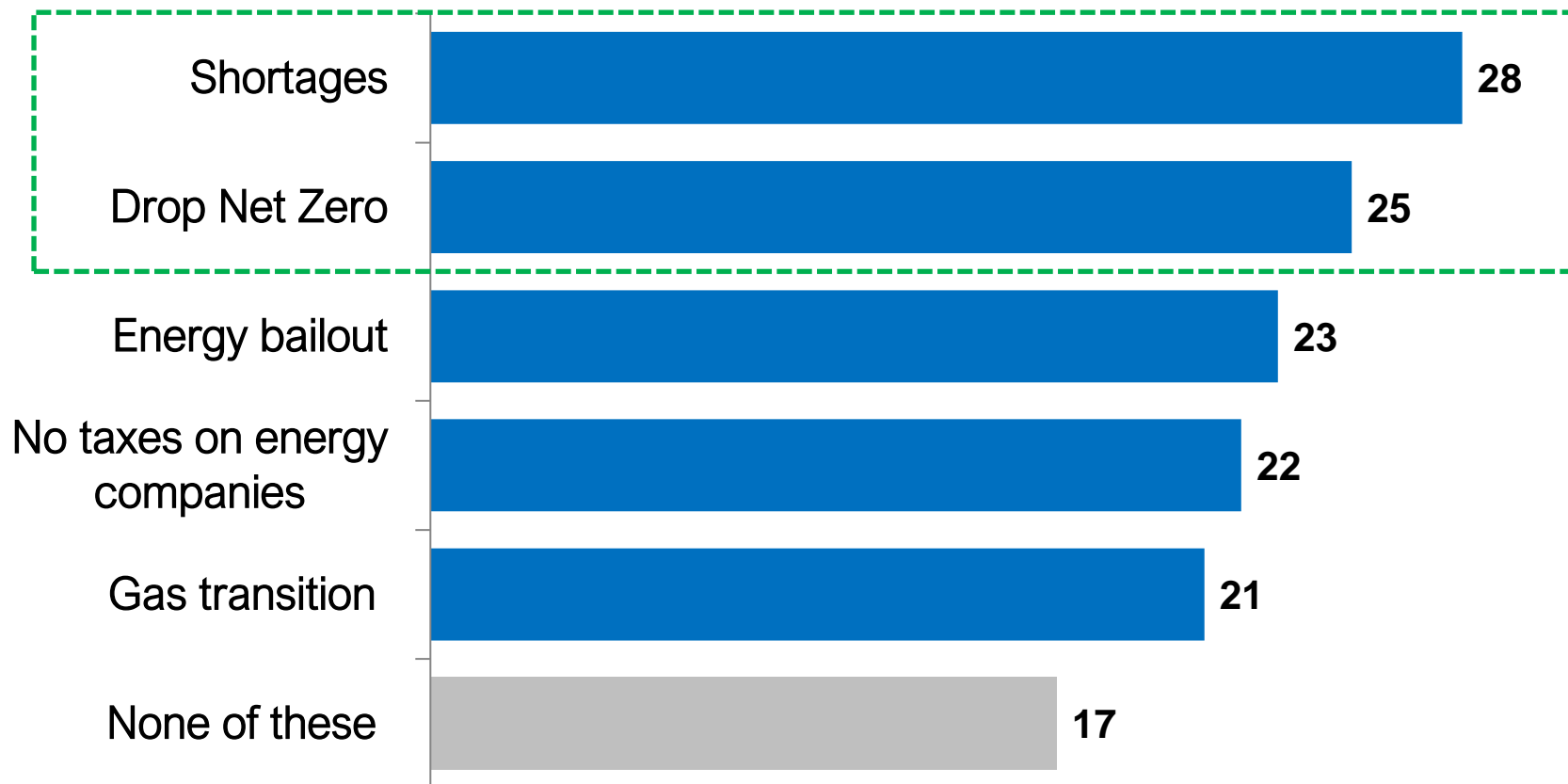
Nigel Farage says: the Prime Minister should commit to no extra taxes on energy companies. We need them to reinvest in the economy to create thousands of jobs. And we need to be self-sufficient in energy by the next election.

Gas transition

Conservative MP Steve Baker says: It's time for a sensible conversation about net zero. The government is committed to net zero in the long term, but renewables are intermittent. They are great when they are available, but they require a lot of subsidies going in. We are going to need gas as a transition fuel.

Strongest climate-sceptical messages criticize government negligence and commitment to Net Zero

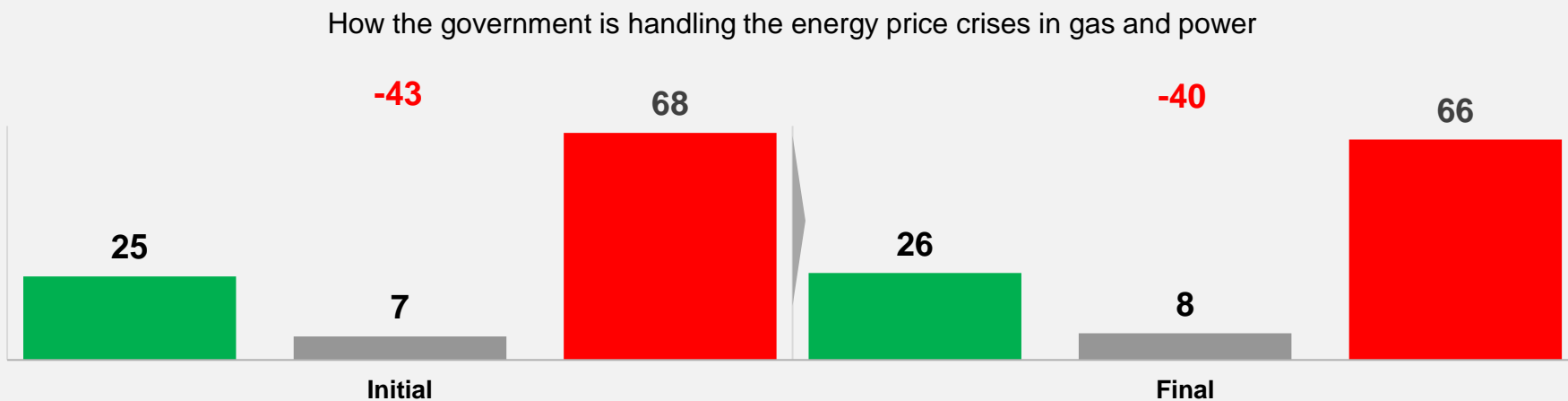
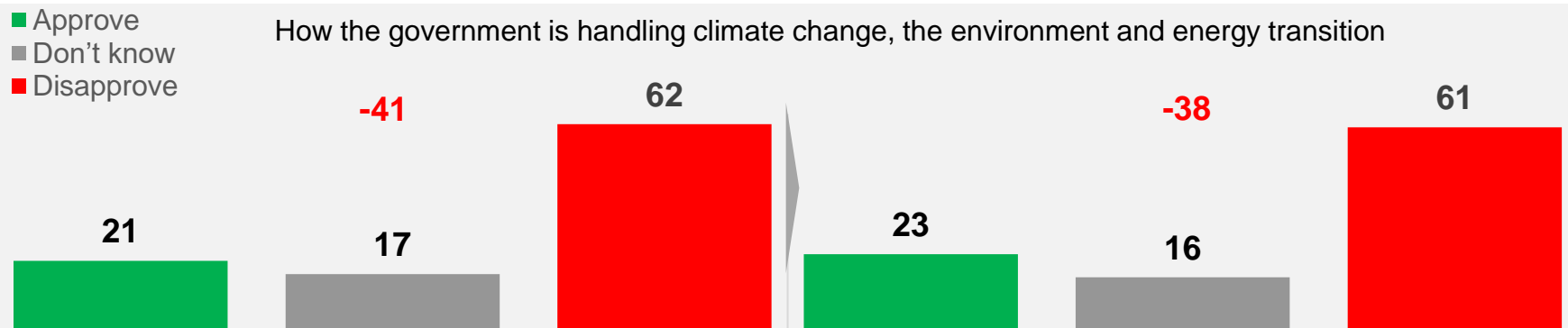
Climate-skeptical messages opposing government policy, total sample



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?

Messages and policies give minimal boost to government approval on climate and energy price crises

Impact of policies and messaging on leader and government approval, total sample



Do you approve or disapprove of the way Liz Truss is handling her job as Prime Minister/the following issues facing the country?

Total, n=2,000

CLIMATE *Policy & Strategy*

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

