

**CLIMATE**  
*Policy & Strategy*

Climate Policy & Strategy: Great Britain  
Tracking survey, May 2023



# What this is based on

## Our poll

- N=2,000 nationally representative survey of Great Britain
- Fieldwork: 19-27 April, 2023
- Online, 20-minute questionnaire
- Weighted to national statistics on gender, age, region, education, social grade, ethnicity and past voting behaviour

## Political target groups

Target group	Definition
<b>Total</b>	All respondents – represents national 18+ population of Great Britain
<b>Engaged</b>	Those very likely to vote in elections (8-10/10)
<b>Climate priority</b>	Chose climate as a top priority for government
<b>Red Wall</b>	Lives in the Midlands or North of England, in a town or rural area, and identifies as working class
<b>Blue Wall</b>	Voted Conservative in the 2019 General Election, voted Remain in the EU Referendum

# What this is based on

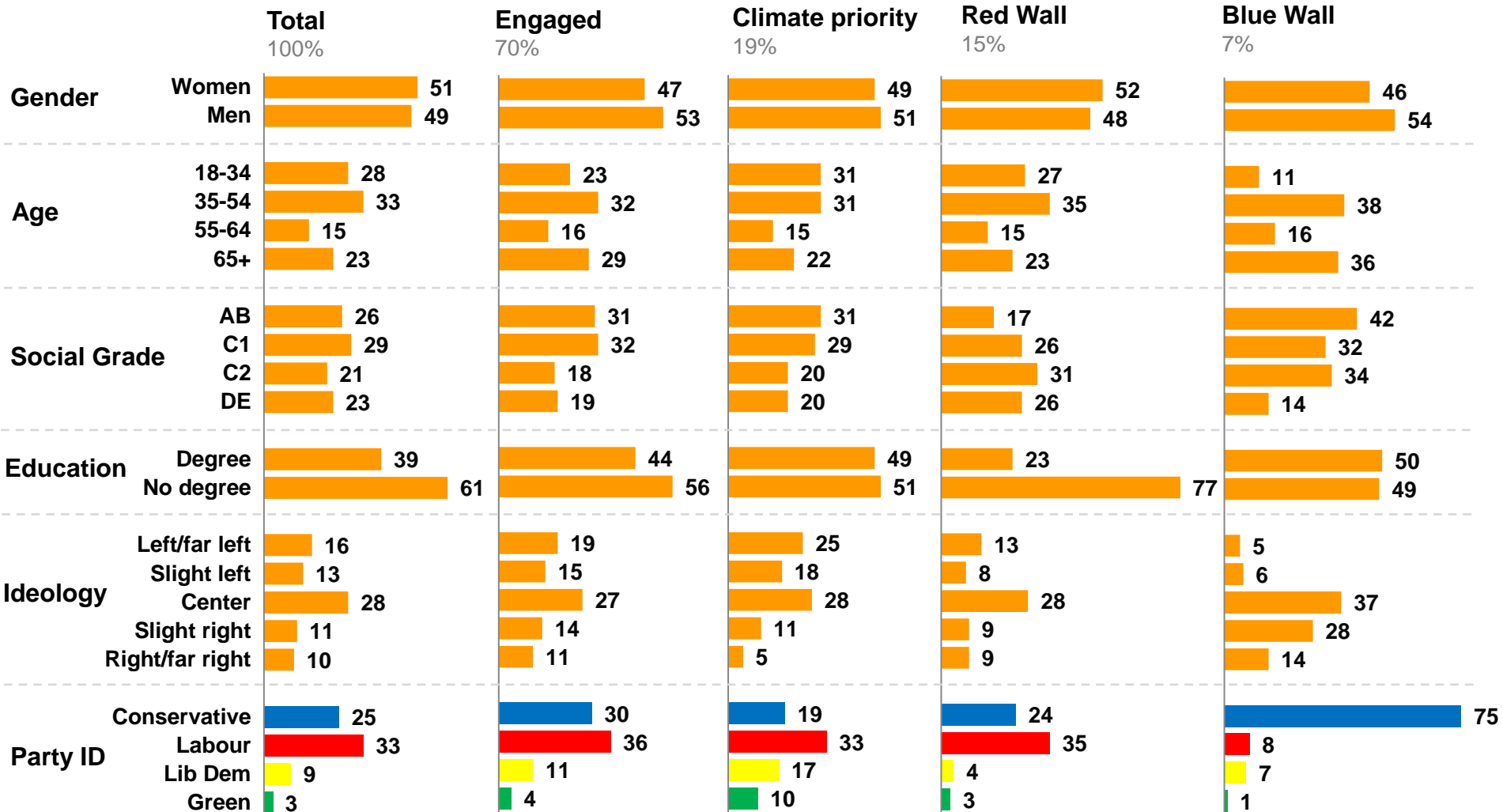
## Our poll

- N=2,000 nationally representative survey of Great Britain
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## Corporate target groups

Target group	Definition
<b>Total</b>	All respondents – represents national 18+ population of Great Britain
<b>Pro Climate CEO</b>	Cool/negative/neutral 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’
<b>Shift to business</b>	Those whose views of BP get warmer/more positive after hearing their positioning

# Political targets:



# What you need to know (1/2)

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- The rising cost of living, inflation and economic issues are all-consuming, though the NHS pushes into the top priorities. The cause of high prices is mostly global, but also by excessive-profit-taking by oil and other companies. But cost pressures dominate all else.
- The citing of profiteering is part of a strong anti-corporate thread. The public is hostile to CEOs of major companies and a growing proportion want to raise taxes on companies. Among the most popular policies is raising corporate taxes and putting a windfall profit tax on energy and oil companies and using the funds for households.
- One in five say climate change is the top problem, which falls with immigration and housing. However, a big, intense majority agree the climate crisis requires major action despite the cost. Big stable majorities want more measures to prevent climate change. CEOs gain standing when they say climate is a crisis and must change the way they do business.
- On industrial policy, half the public says the government should support the low-carbon sector, including new technologies, solar, wind and green hydrogen. The proportion prioritizing oil and gas dropped to 24 percent.
- The strategic landscape has changed with deep hostility to Russian and China. That impacts views on energy and the energy transition. The government gets high marks on providing military and financial aid to Ukraine, though much lower on applying sanctions or doing enough to replace Russian energy.

# What you need to know (2/2)

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- The public gives Russia and China the most negative ratings, then oil companies and the Extinction Rebellion. It has dragged down ratings of environmental groups. Nuclear gas companies are not as polarizing.
- Majorities oppose responding to the cut off of Russian energy with exploiting all domestic energy sources. They prefer to speed the transition to renewables that do not have to be imported from stable countries.
- The Prime Minister's overall approval and handling of climate change are above his vote, but well below his vote on the economy and prices for gas and power. The vision principles shortening NHS waiting lists, halving inflation and growing the economy get the highest support. The government energy policies that get the highest support are ones that have ended, changed or reduced in scale: £400 help with energy bills, extending the windfall profit tax, rewards to farmers to reduce risk and relaxing the ban on onshore wind.
- Labour's most popular policies include improving the NHS, making Britain a clean energy superpower and reforming police. Its most popular energy policies include freezing energy bills with windfall profit tax, crackdown on dumping, funds to insulate homes and establishing a Great British Energy, a new publicly-owned company as well as Labour's attack on not having a proper windfall tax and the cost of the on-shore ban.
- After hearing the priorities and policies of the government and Labour, the vote shifts further against the government.

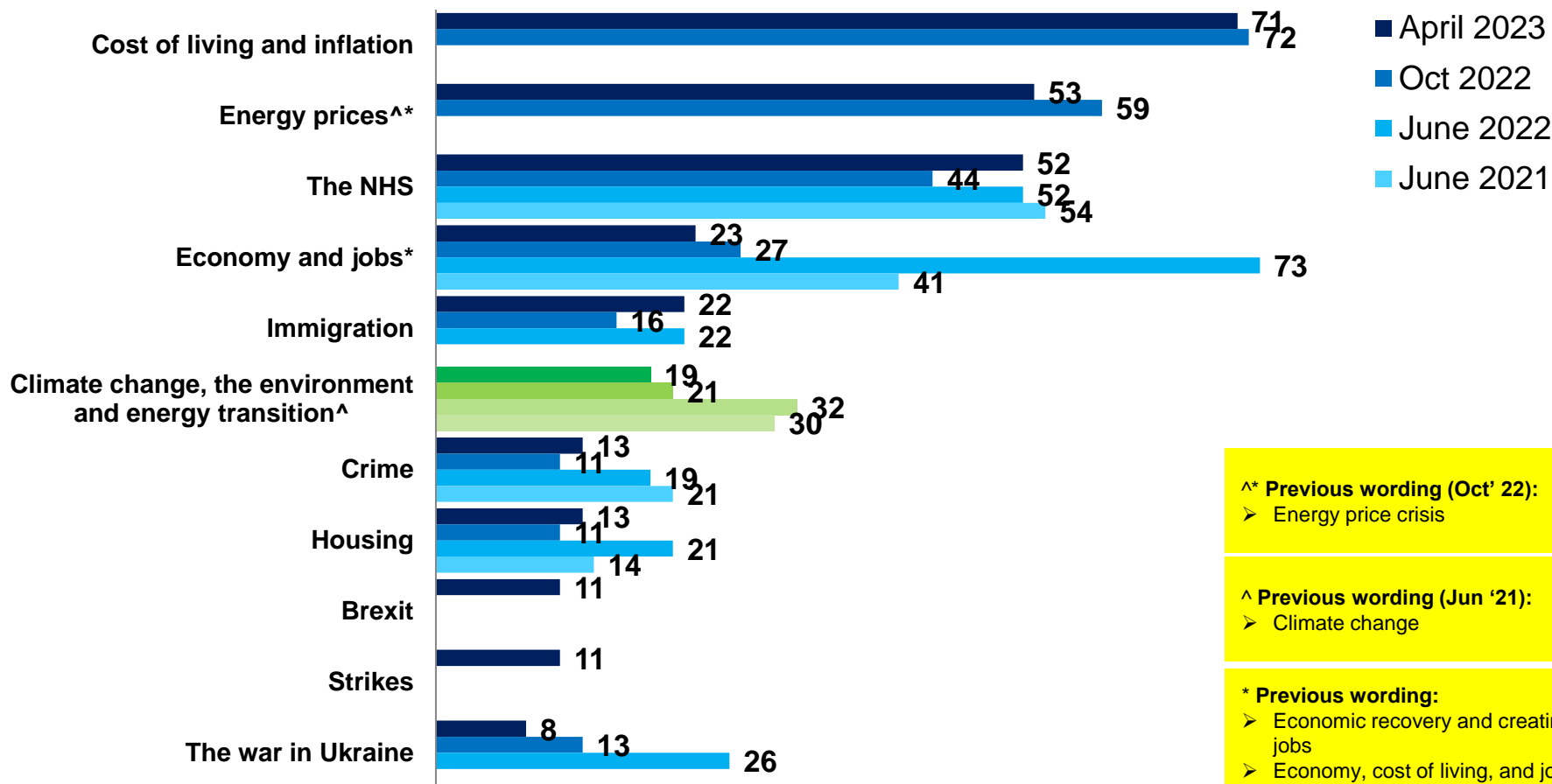
# Climate Context

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# Cost of living and inflation, plus NHS top priorities, moving up are immigration; climate stable at one in five.

Priorities for government, total sample



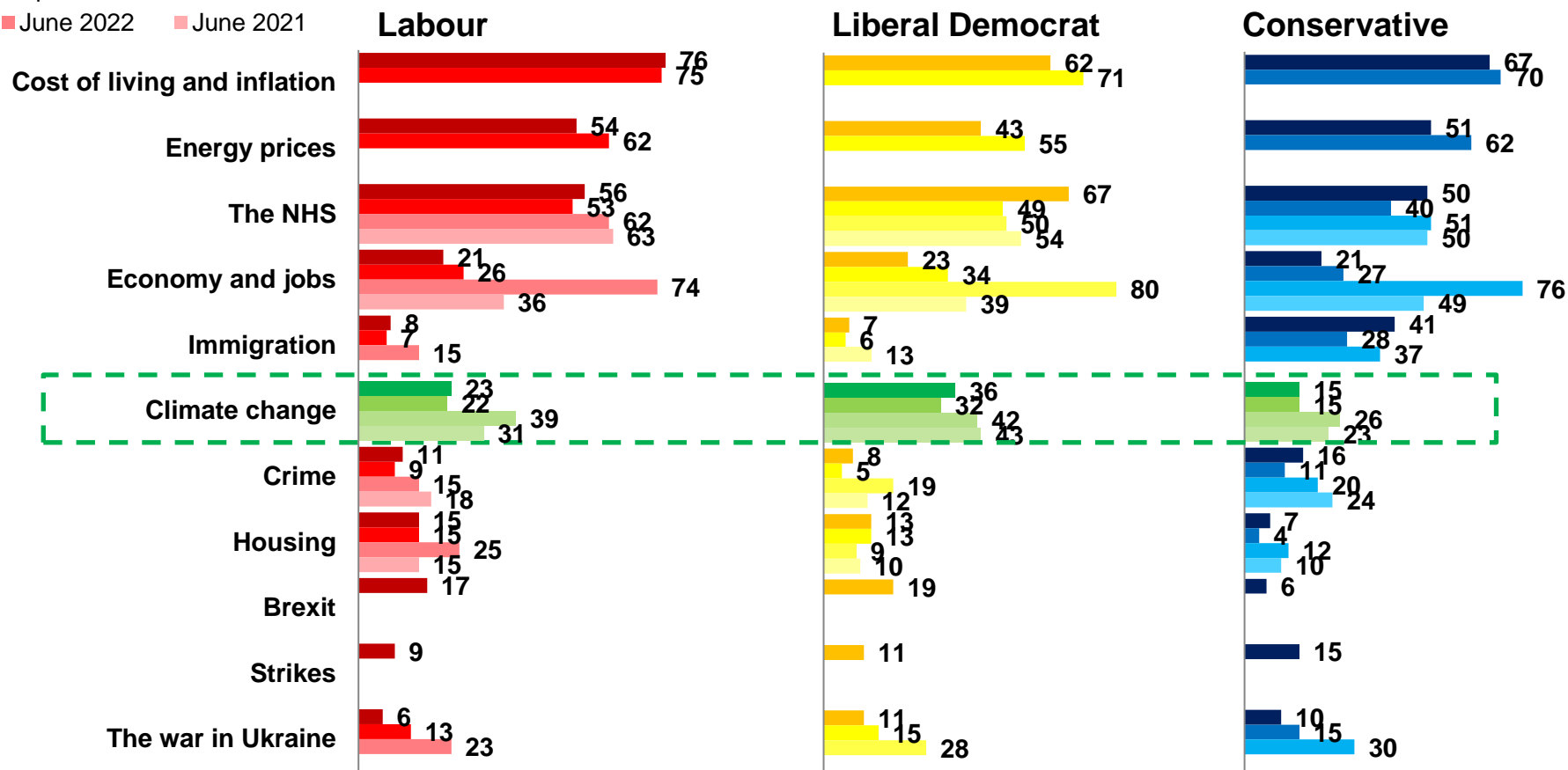
What are the *THREE* issues you think should be the top priorities for government?



# For conservatives, climate with crime, for Labour, with economy and jobs, and Liberal Democrats, rises marginally to 36 percent

Priorities for government, by past vote

■ April 2023    ■ Oct 2022  
■ June 2022    ■ June 2021



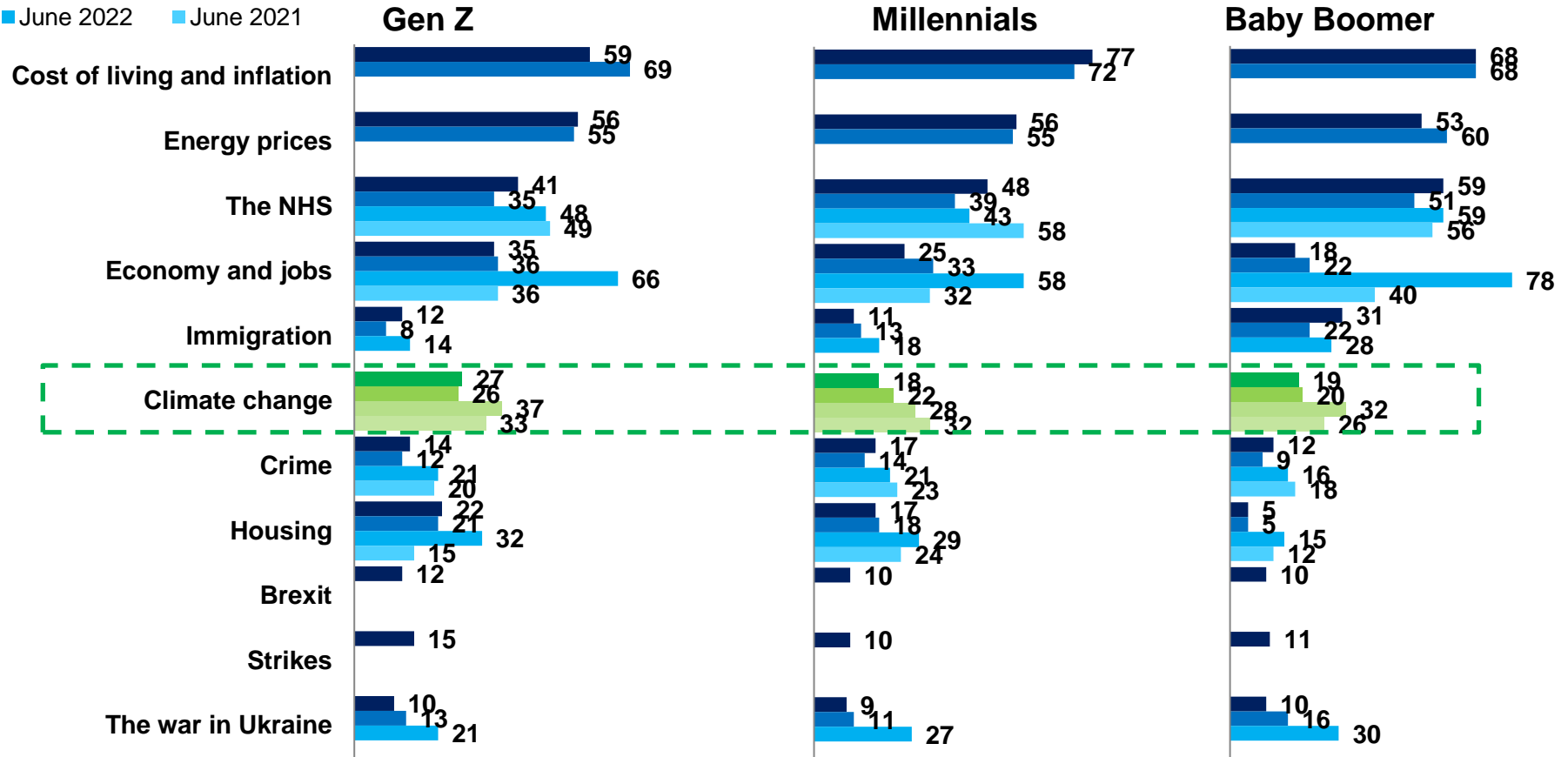
What are the *THREE* issues you think should be the top priorities for government?

2019 vote: Labour, n=505; Liberal Democrat, n=141; Conservative, n=621

# For all generations, cost of living & energy prices, with surging worries about NHS.

Priorities for government, by generation

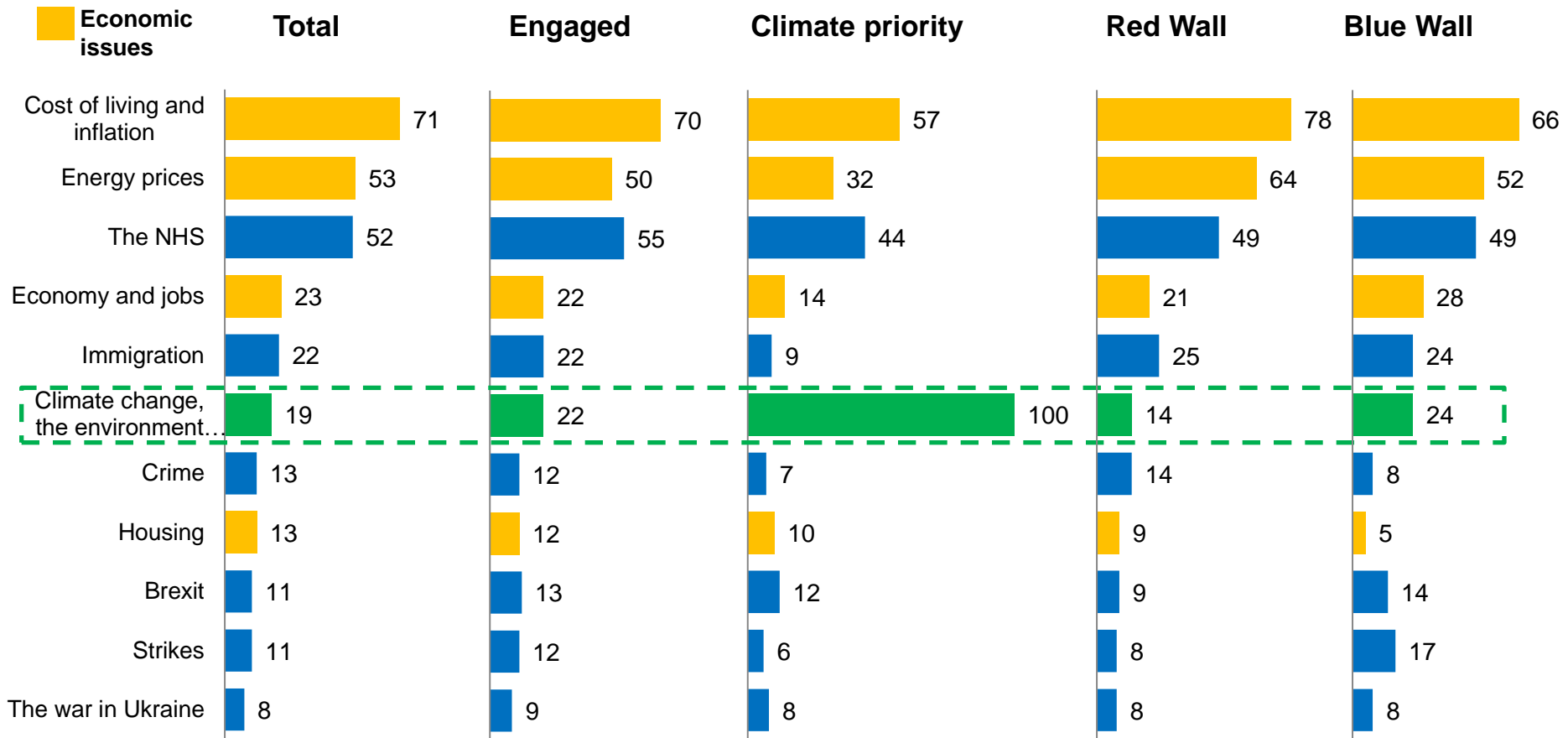
■ April 2023   ■ Oct 2022  
 ■ June 2022   ■ June 2021



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

# Among targets, cost of living, inflation, energy prices joined by the NHS with all targets

## Priorities for government, by target

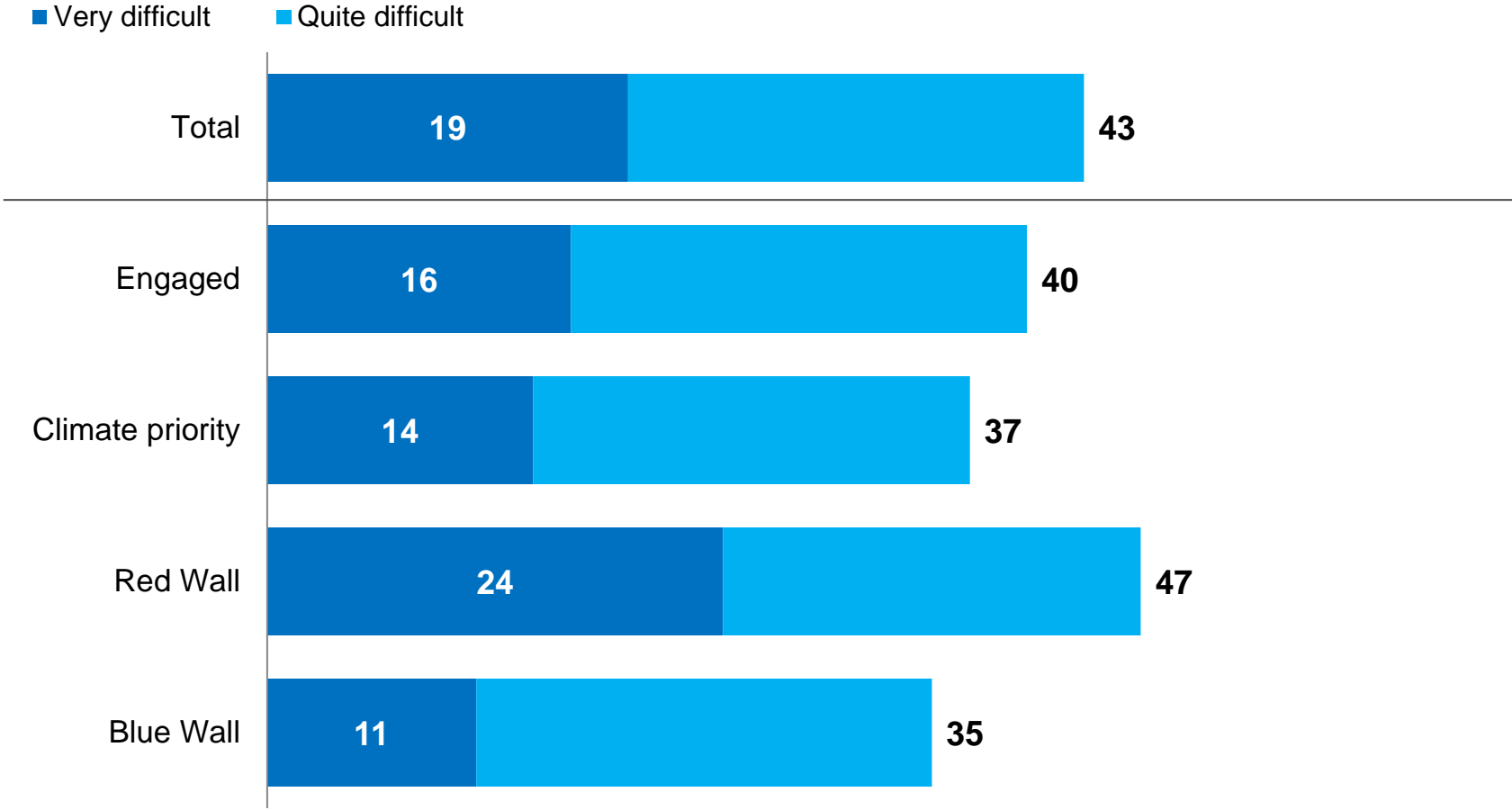


What are the *THREE* issues you think should be the top priorities for government?

Total, n=2,000; Engaged, n=1,395; Climate Priority, n=383; Red Wall, n=306; Blue Wall, n=139

# Plurality found it difficult to heat their homes; more so among Red Wall seats

Difficulty heating home this winter, by target



How difficult was it for you and your family to afford heating your home this winter?

Total, n=2,000; Engaged, n=1,395; Climate Priority, n=383; Red Wall, n=306; Blue Wall, n=139

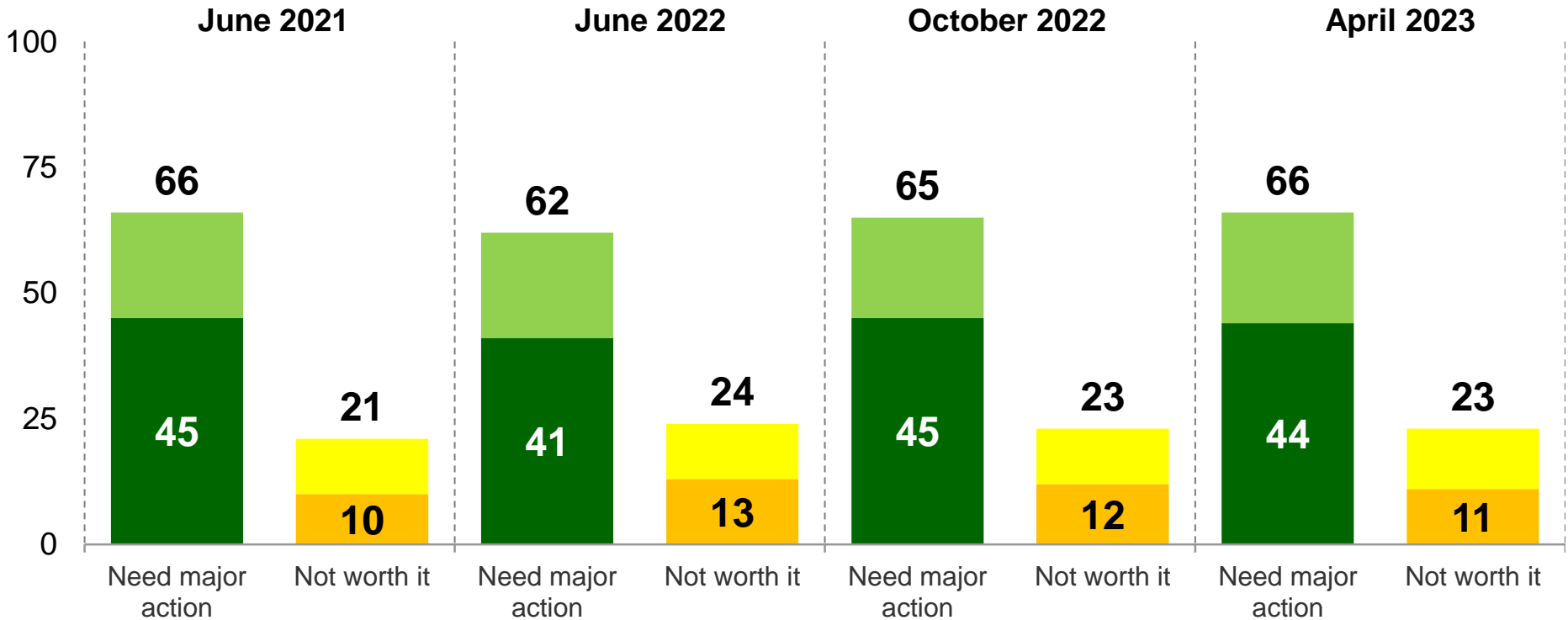
# Two-thirds believe climate change is a threat that requires major action; almost half agree with intensity

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) (2022-2023) 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.

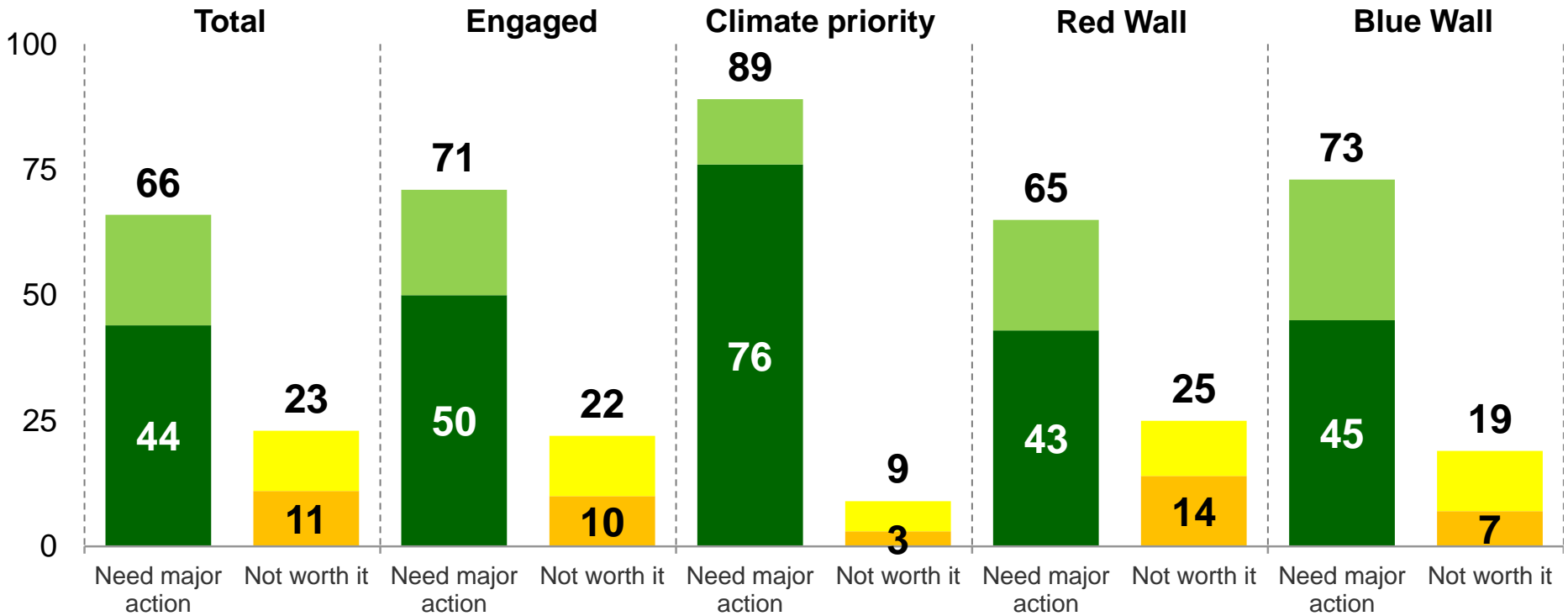
Total, n=2,000

# This belief much higher with engaged and Blue Wall, sustained in Red

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



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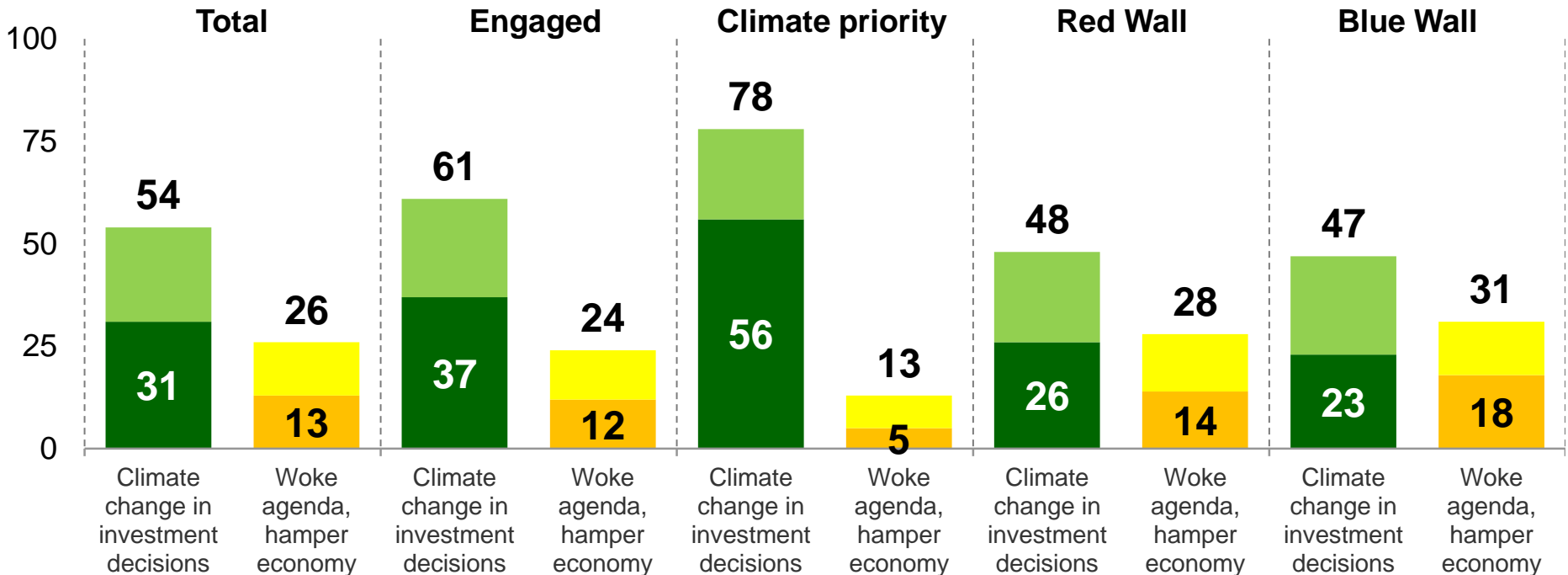
Total, n=2,000; Engaged, n=1,395; Climate Priority, n=383; Red Wall, n=306; Blue Wall, n=139

# Majority in the UK say right for companies to factor in climate change in their investments

1) Climate change is a major factor affecting future operations and companies and banks are right to bring it into their investment decisions globally.

2) Bringing climate change into investment decisions is about forcing a left wing, woke agenda on companies and banks and will hamper flourishing of the economy and our ability to make correct decisions for Britain.

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



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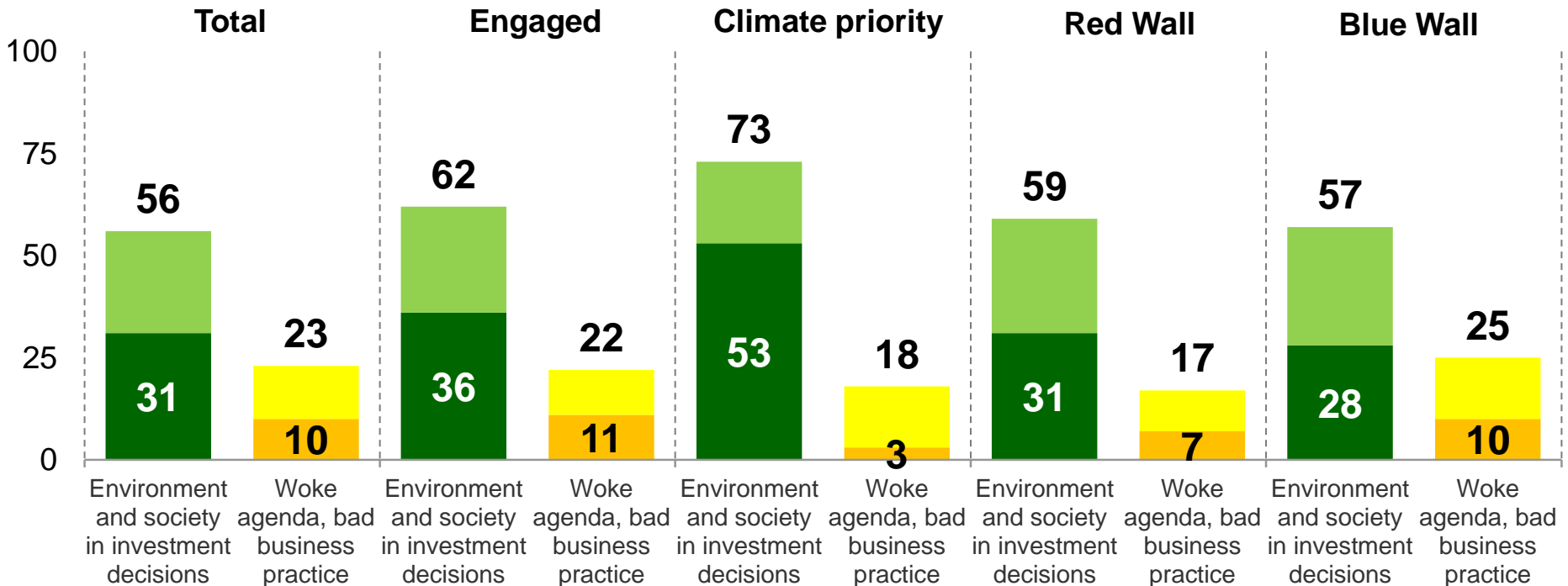
Total, n=1,000; Engaged, n=697; Climate Priority, n=191; Red Wall, n=153, Blue Wall, n=70 - Shown to ½ sample splits

# Majorities believe sound business to factor in environmental and society, even competitors not doing so

1) It is sound business for companies to factor in their impacts on the environment and society when they make decisions, even if global competitors are not following suit.

2) Bringing the environment and society into investment decisions is about forcing a left wing, woke agenda on companies and banks and is not a sound way to do business.

■ 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=1,000; Engaged, n=697; Climate Priority, n=191; Red Wall, n=153, Blue Wall, n=70 - Shown to ½ sample splits



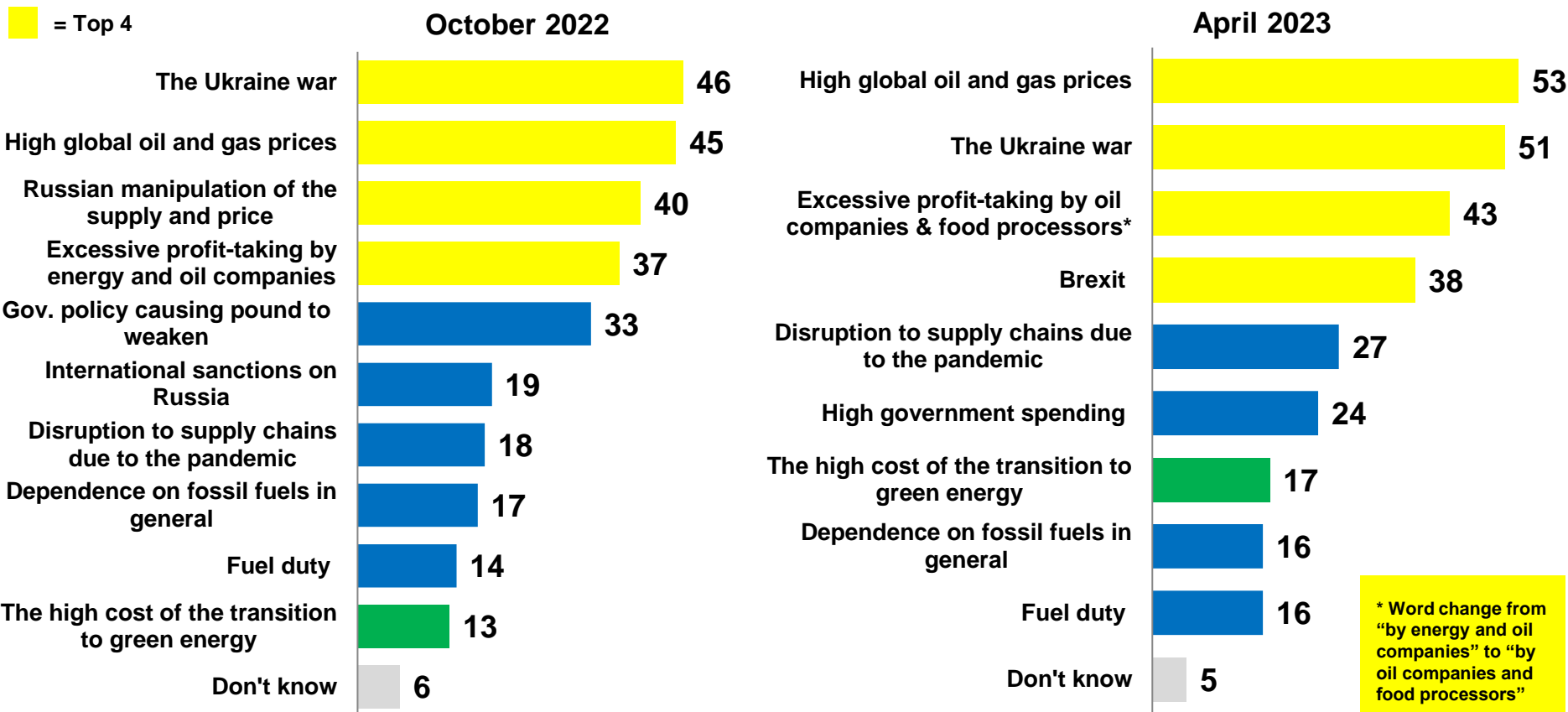
# Climate and energy policy

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# High global prices and the war in Ukraine grow as top reasons for higher costs; excessive profits & Brexit also factors

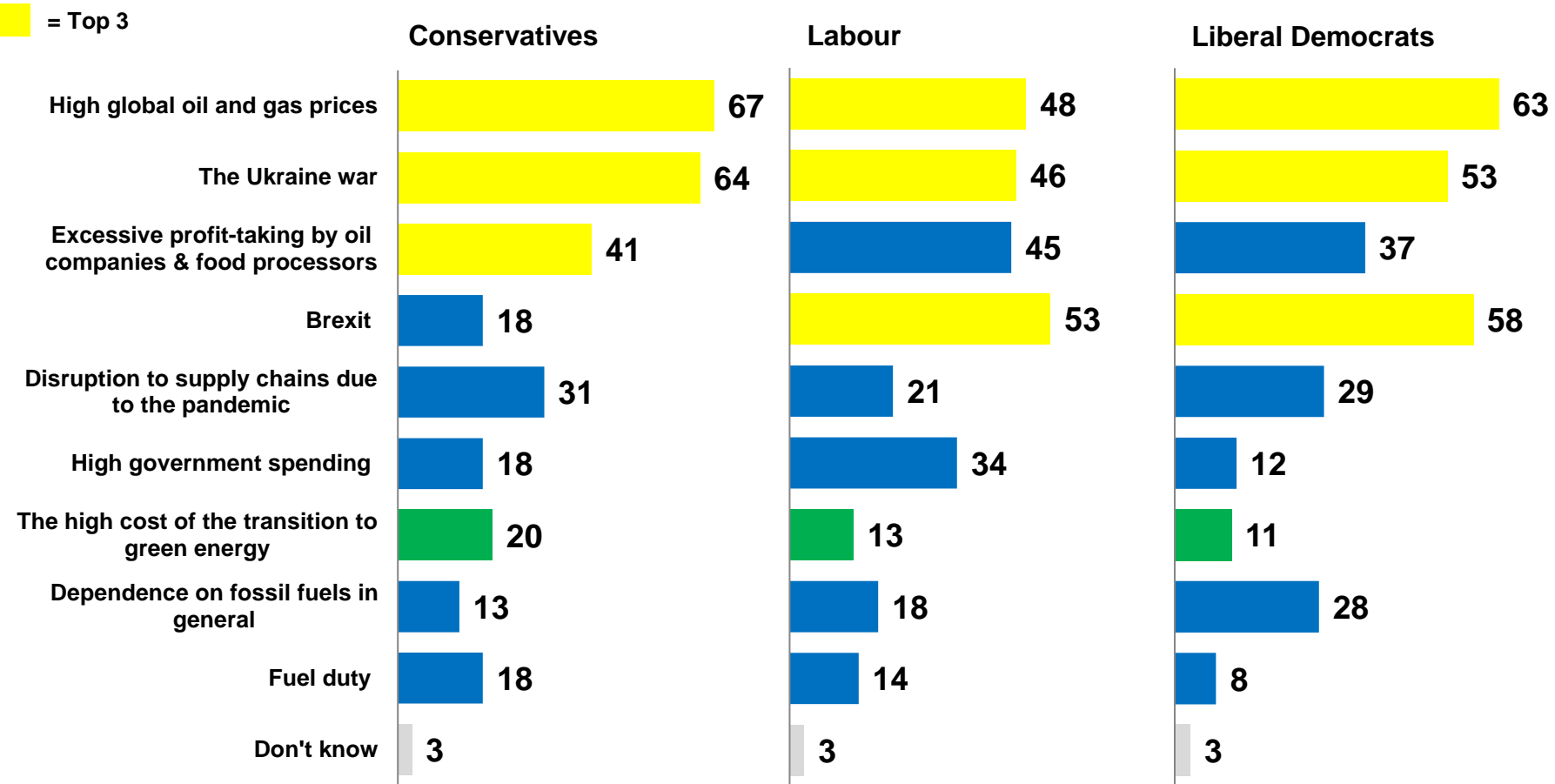
Reasons for higher costs, over time, total sample



(2023) As you know, Britain has faced higher prices for things. Please select the THREE most important reasons those are happening from the list below. (2022) 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.

# Conservatives blame high global prices and the war; Brexit very high for Labour & Liberal Democrats; excessive profits important Labour and Tories

Reasons for higher costs, by past vote

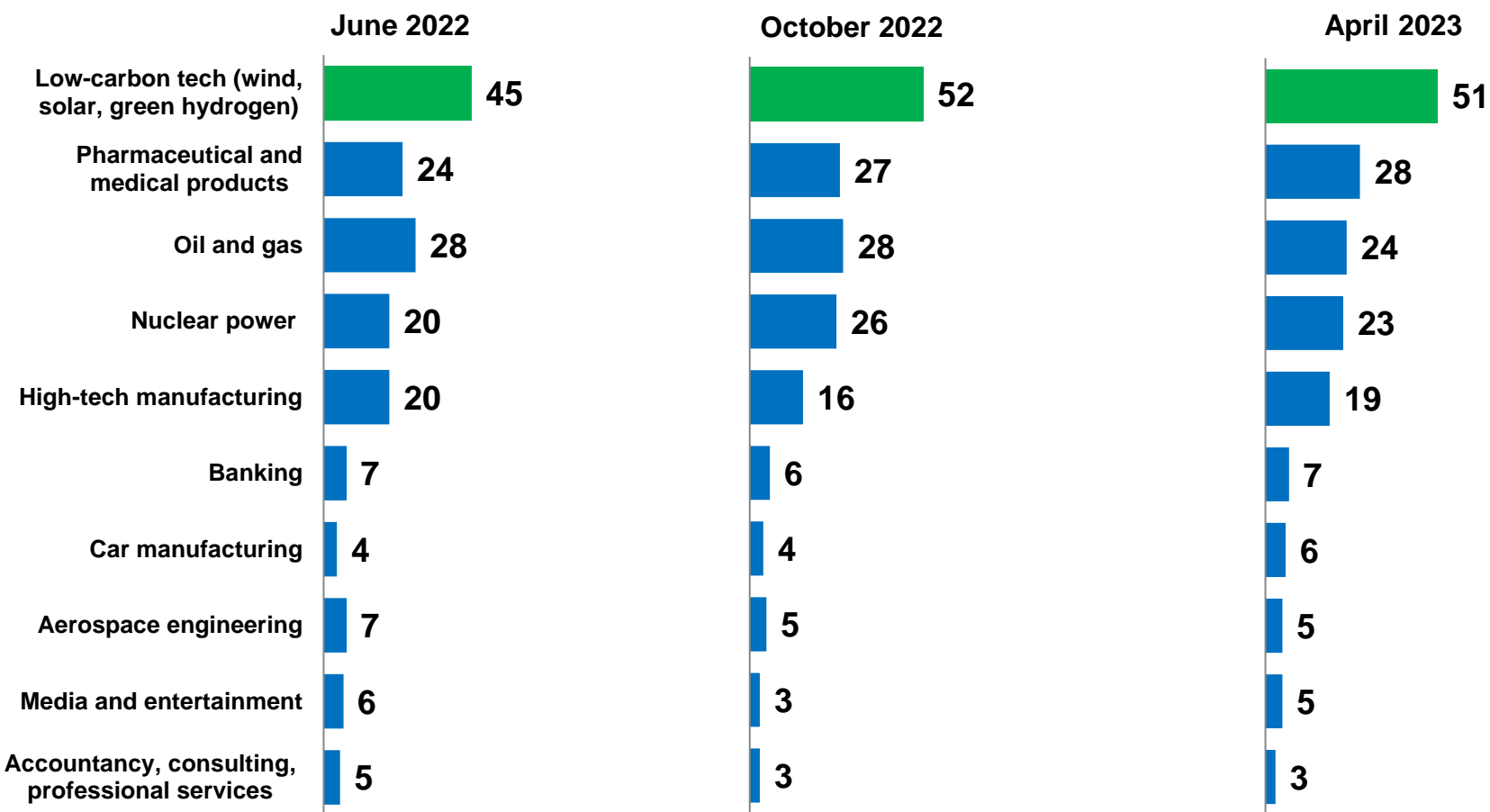


*As you know, Britain has faced higher prices for things. Please select the THREE most important reasons those are happening from the list below.*

2019 vote: Conservative, n=621; Labour, n=505; Liberal Democrat, n=141

# Low-carbon energy remains top sector for government to support and 4-point drop for oil and gas

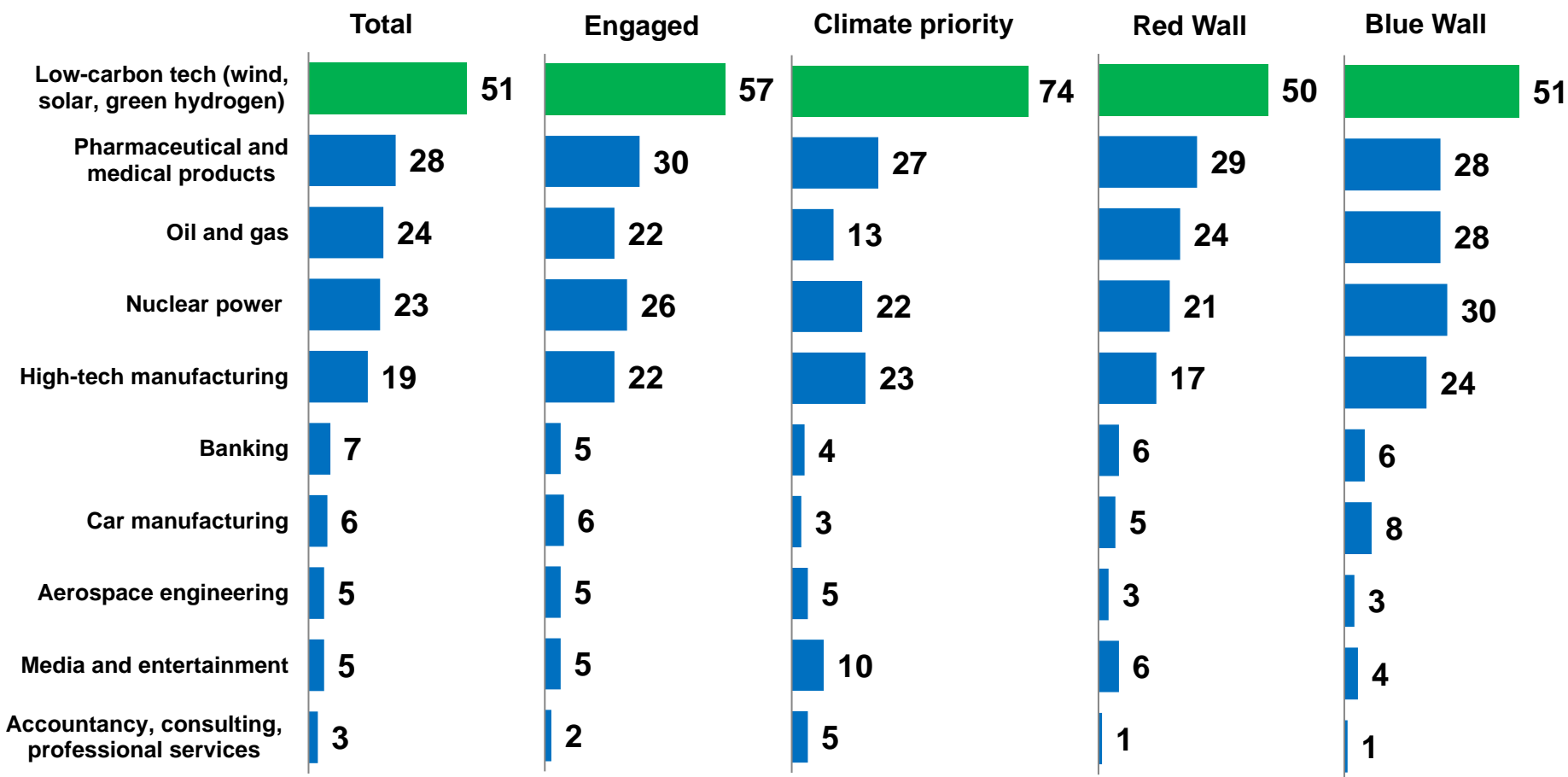
Industries that government should support, by target



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

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

Industries that government should support, by target



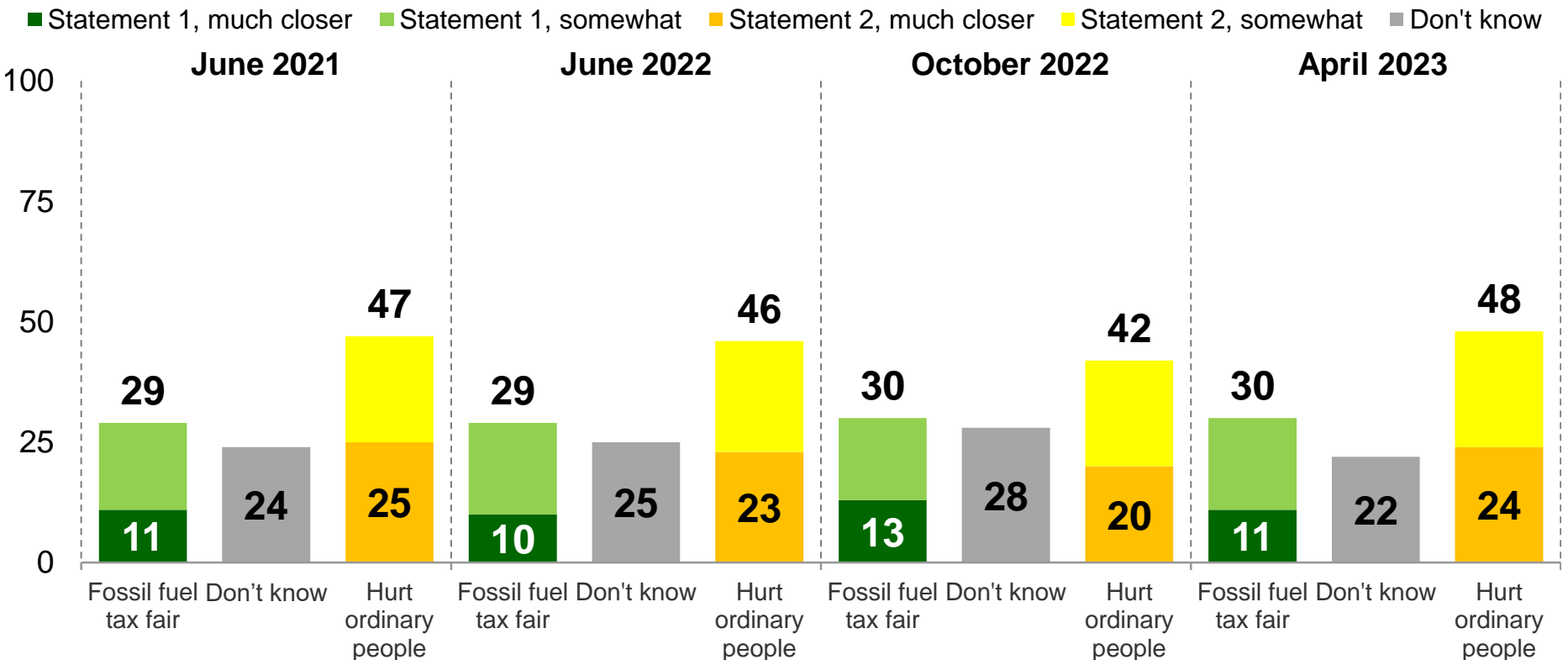
Which TWO of these industries would you MOST want the government to support and champion?

Total, n=2,000; Engaged, n=1,395; Climate Priority, n=383; Red Wall, n=306; Blue Wall, n=139

# Barely 30 percent see taxing burning of fossil fuels as “fair and efficient” way of changing to low-carbon

1) A tax on burning coal, oil and natural gas would be a fair and efficient way of encouraging people to switch to lower-carbon ways of living.

2) Even if the government tries to fully refund any tax revenue back to families, a tax on burning coal, oil and natural gas would end up hurting ordinary people.



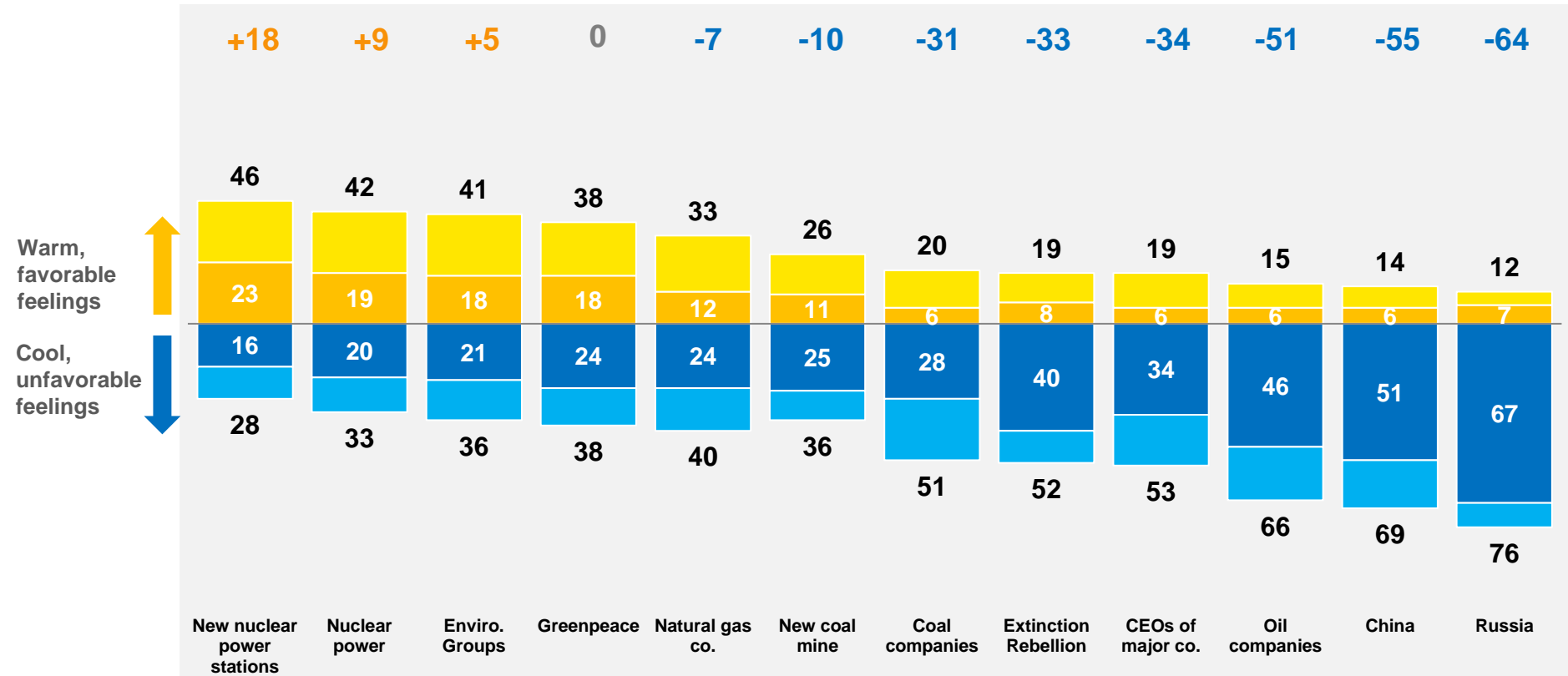
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Total, n=2,000- Shown to ½ sample split

# In the UK, nuclear power and new nuclear power stations receive favourable ratings, but not new coal; oil sector in own negative space; Extinction Rebellion hurting other environmental groups.

Feelings toward companies and environmental actors, Great Britain

■ 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



# Ukraine war and end of Russian energy

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# Britons do not think enough is being done to punish Russia or to find new 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?*

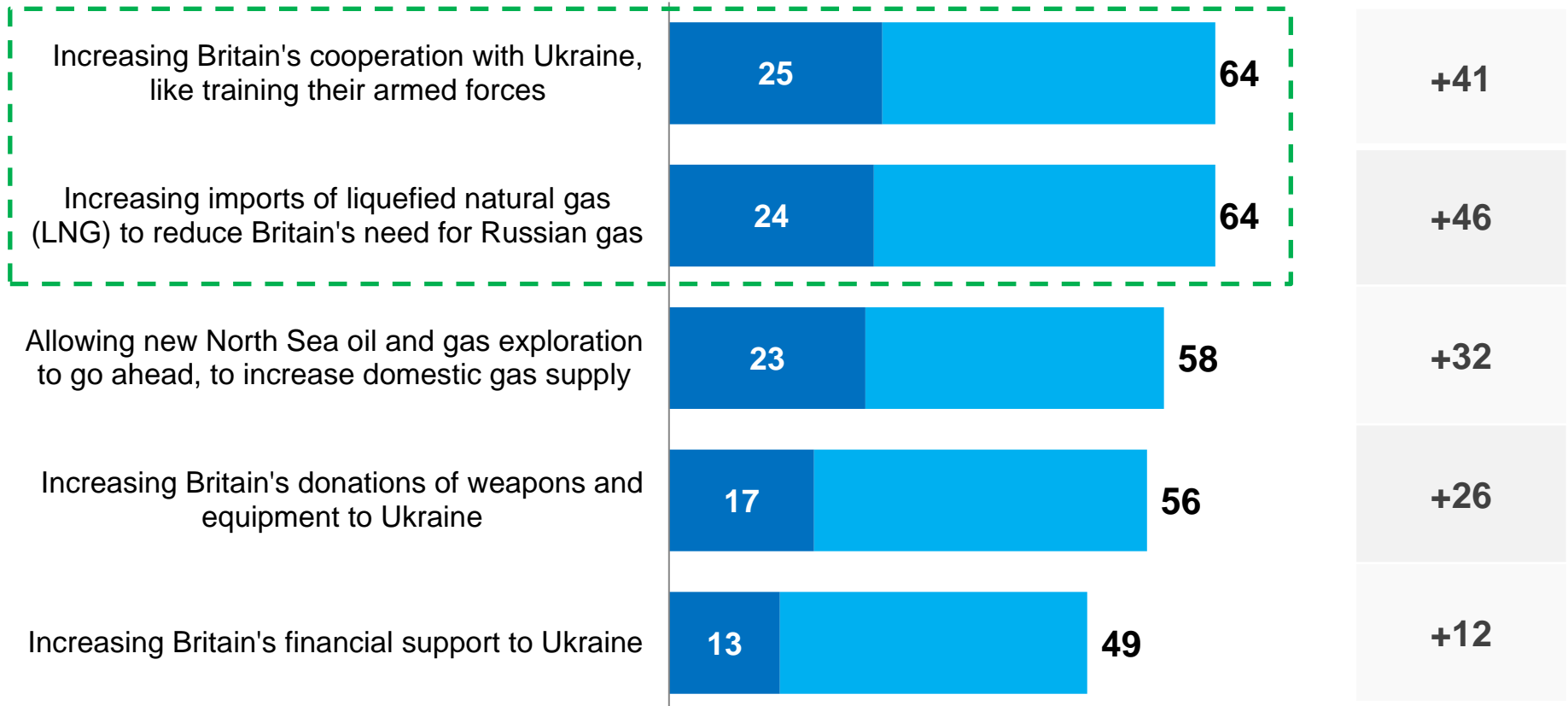
Total, n=2,000

# Majorities support offering training to Ukrainian armed forces and increasing LNG imports; interesting that LNG imports higher than new North Sea exploration

Support for government response to war in Ukraine, total sample

■ Strongly support    ■ Support somewhat

Support – Oppose  
Difference



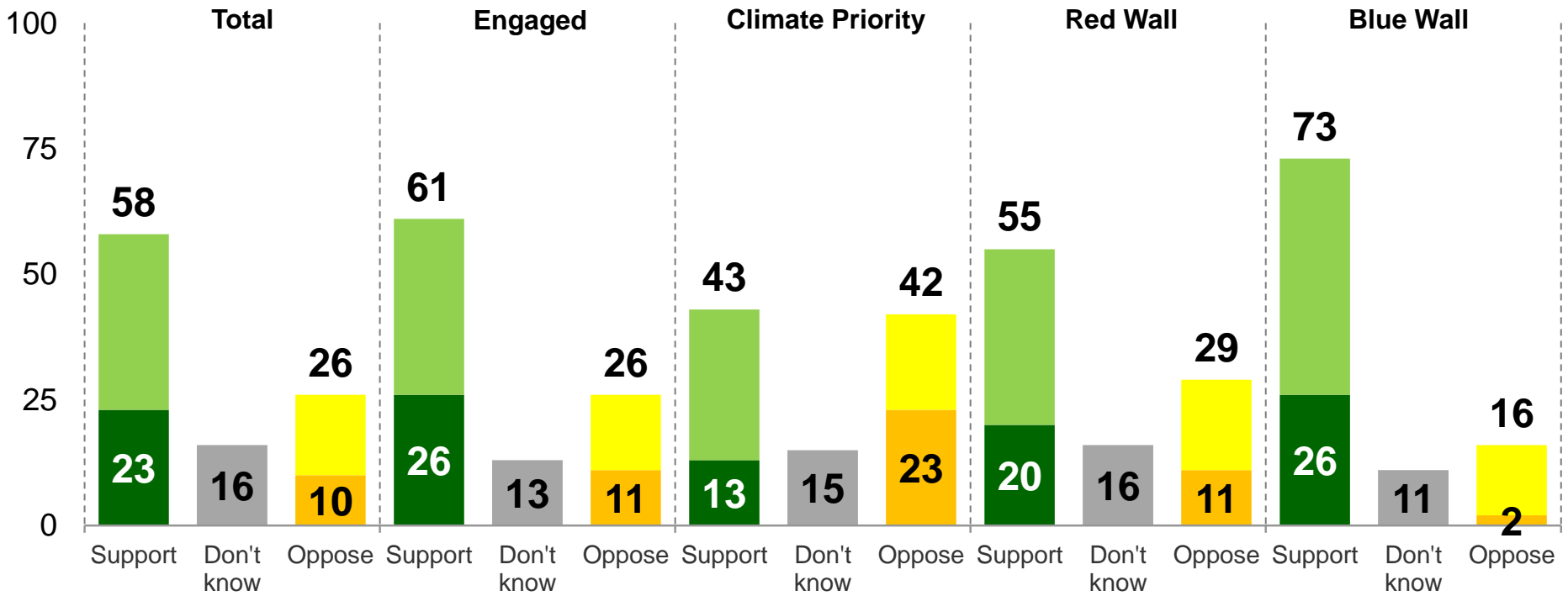
*Do you support or oppose each of the following?*

**Total, n=2,000**

# Big majorities for exploring in North Sea, but with little enthusiasm anywhere

Allowing new North Sea oil and gas exploration to go ahead, to increase domestic supply

■ Strongly support    ■ Somewhat support    ■ Strongly oppose    ■ Somewhat oppose



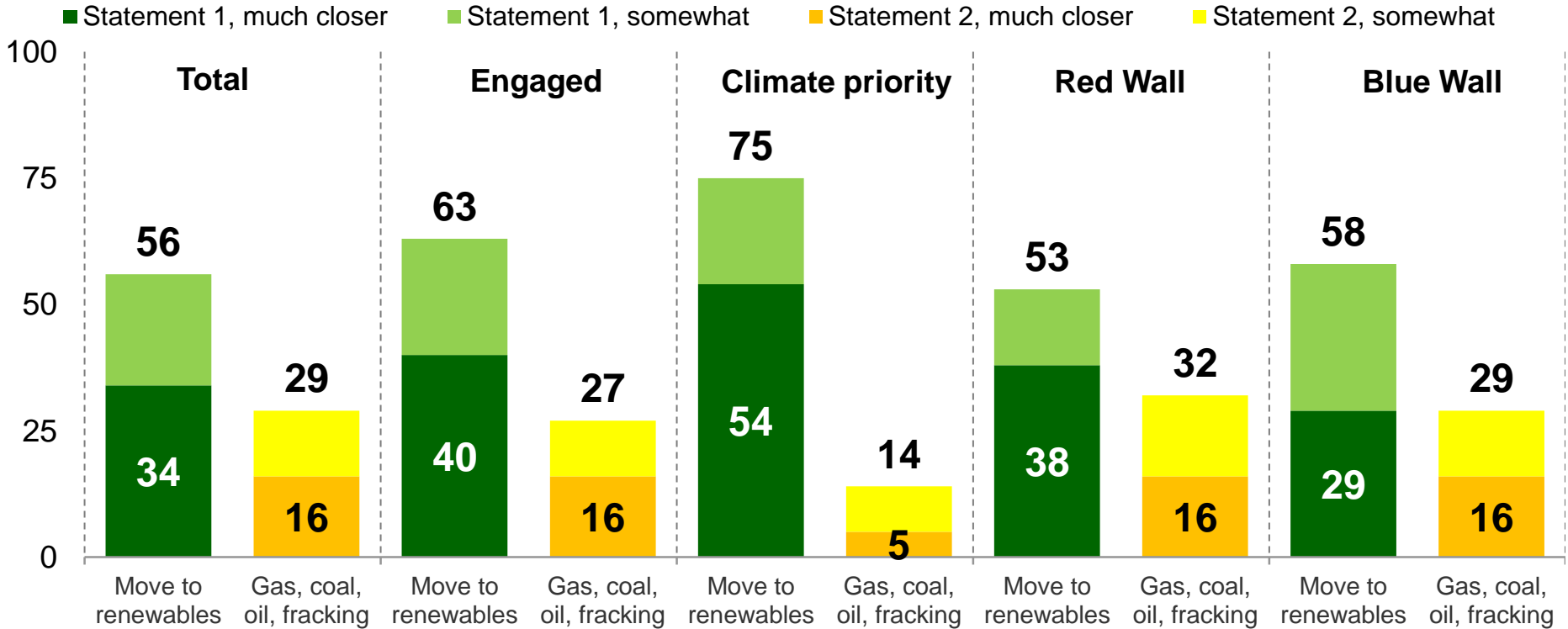
Do you support or oppose each of the following?

Total, n=2,000; Engaged, n=1,395; Climate Priority, n=383; Red Wall, n=306; Blue Wall, n=139

# All target groups agree we need to hasten our transition to renewable energy — rather than all out exploration of domestic sources when including fracking

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.



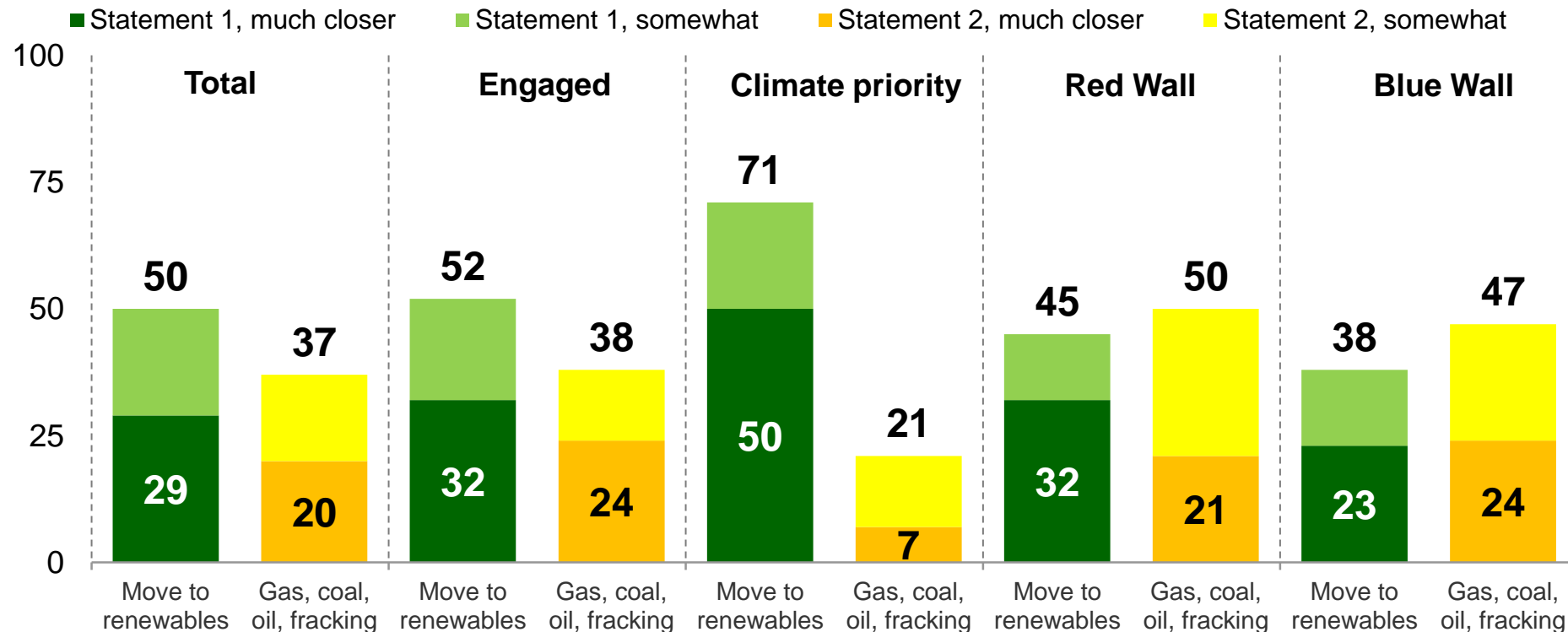
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# Without fracking, an intense 50% still say go to renewables, but in Red Wall, 50% support all domestic. Those for shifting have more intense views (32-21) & Blue Wall Tory voters eroded

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 as well as renewables to achieve energy security



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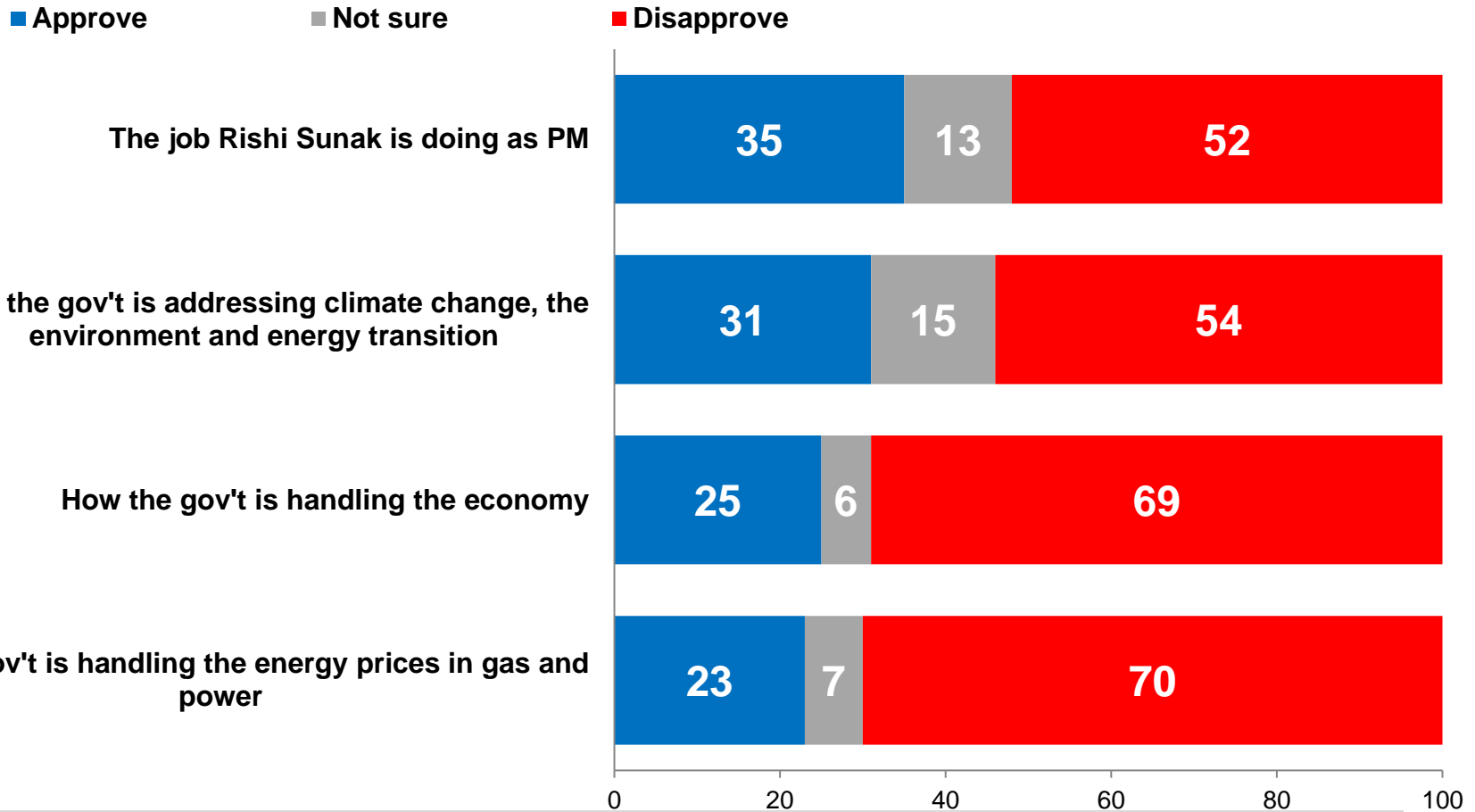
Total, n=2,000; Engaged, n=1,395; Climate Priority, n=383; Red Wall, n=306; Blue Wall, n=139 - Shown to 1/2-sample splits



# Government policies

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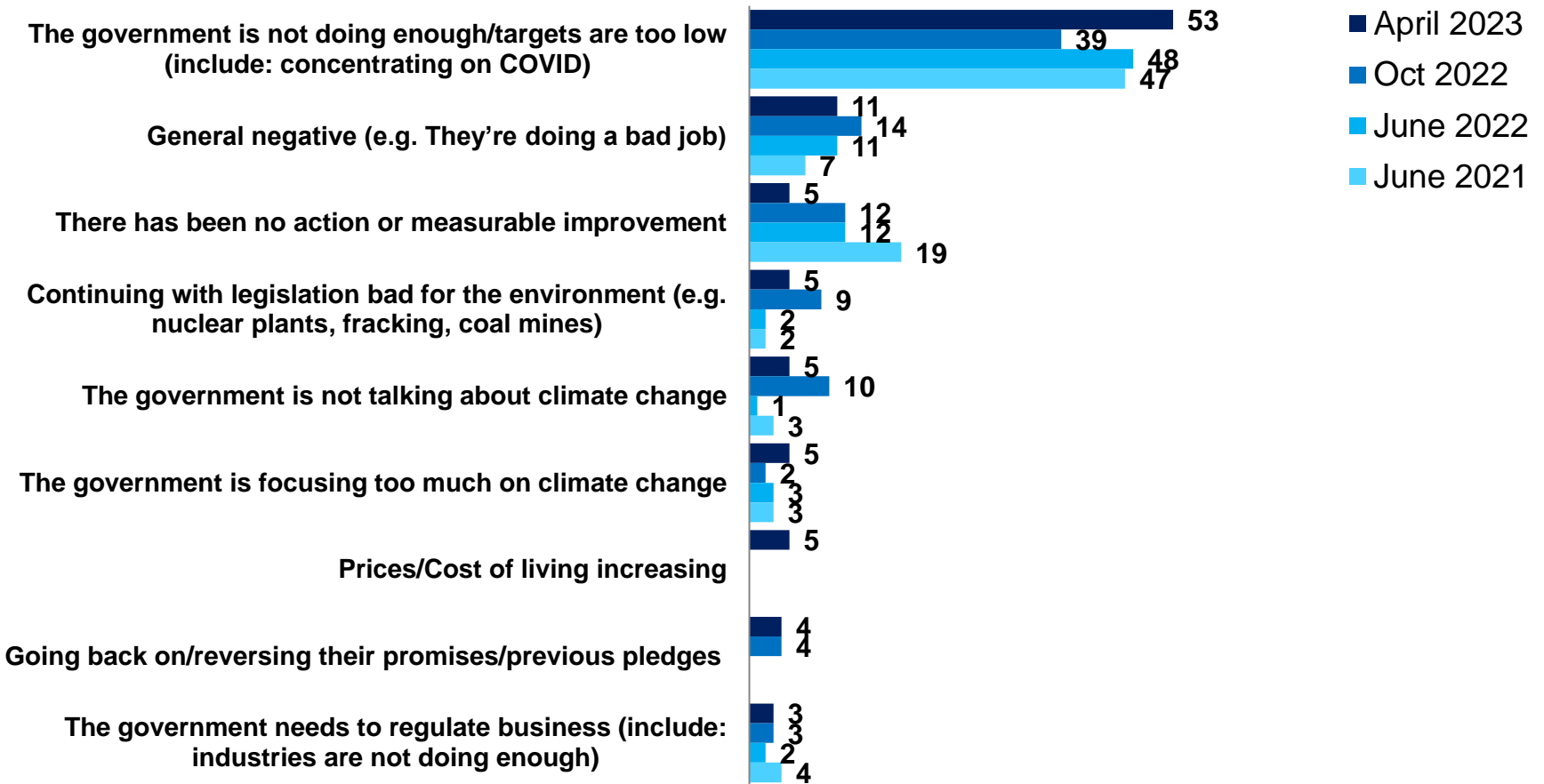
# Sunak's overall approval rating at 35% is above the Conservative vote; his handling of the economy and energy prices is well below



How much do you approve or disapprove of each of the following?

# Why disapprove? Dramatic jump in those saying government is not doing 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?



# Shortening NHS wait lists most important policy proposed by the government

Plans proposed by government, total sample

Top 6

Shorten NHS wait lists and ensure people get the care they need more quickly

64

Halve inflation by the end of the year

46

Grow the economy, creating better-paid jobs across the entire country

40

Stop small boats: those entering illegally will be detained and removed

31

Reduce national debt to secure the future of public services

23

Introduce an extra 20,000 police officers to catch more criminals and reduce violence

21

# ‘Seizing opportunities of Brexit to ensure our regulatory system is agile’ least popular

Plans proposed by government, total sample

Bottom 4

Increase public funding in R-and-D to enhance strengths in AI, life sciences, quantum, fintech, and green technology

16

Provide £2 billion of new funding for schools, including a program to ensure all children study maths until 18

15

Achieving and implementing agreement with the European Union on Northern Ireland protocol

14

Seizing the opportunities of Brexit to ensure our regulatory system is agile and pro-innovation

12

# Public most interested in governments plans to introduce a £400 discount to help with energy bills

Plans on energy proposed by government, total sample

Top 5

A £400 non-repayable discount to eligible households to help with their energy bills over winter 2022 to 2023, with an additional £1,200 support for the most vulnerable households

45

Extend the windfall profits tax on oil and gas companies from 25 to 30 percent

37

Reward farmers for actions to reduce risks and impacts from floods, droughts, and wildfires through our new future farming schemes

30

Relaxing the ban on onshore windfarms

29

The Eco Plus scheme, which extends financial support to low-income or vulnerable households to improve the energy efficiency of their homes

28

# Britons do not warm to the governments proposal to reinstate the moratorium on fracking or open new coal mine.

Plans on energy proposed by government, total sample

Bottom 5

Creating a new government department dedicated specifically to energy security and reaching net zero

24

An investment plan to improve coastal and flood defences, including 100 million pounds on the most frequently flooded areas

23

£113 million investment in hydrogen and all-electric flight technologies

19

Open a new coalmine in Cumbria to produce coal for the steelmaking industry

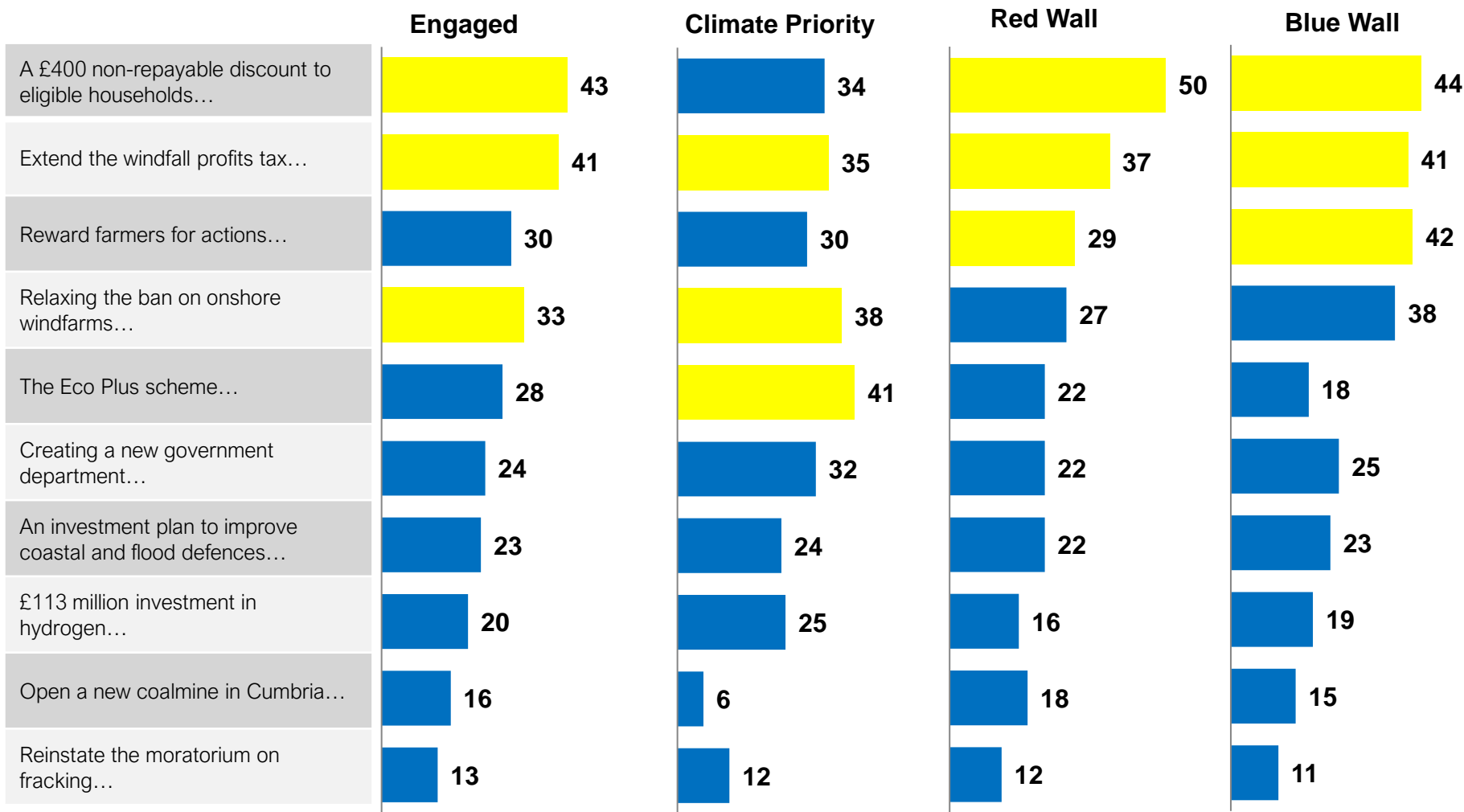
15

Reinstate the moratorium on fracking

13

# £400 discount to help with energy bills & extending windfall profits tax top proposal for all electoral targets

Plans on energy proposed by government, by target ■ = Top 3



Total, n=2,000; Engaged, n=1,395; Climate Priority, n=383; Red Wall, n=306; Blue Wall, n=139

# But to start, many Britons feel nothing works, with worries about inflation and declining living standards close behind.

Opposition statements towards current government, total sample

It feels like nothing works - not the National Health Service, not the railways, not schools. Nurses, paramedics, border agents, teachers, and other workers are protesting. This goes beyond inflation, but to systematic underfunding of our schools and British infrastructure for the past decade

38

The Conservative Party has not done nearly enough to mitigate high inflation and a harsh decline in living standards. Wage increases do not come close to matching price increases. The UK will be the only major economy to contract in 2023, while other countries have started to rebound

24

Above all else, the Conservative Party has been too chaotic, and unable to keep the British people out of their own internal squabbles and scandals. Rishi Sunak is too weak to change this - under his government we have already seen cabinet members quit due to bullying and party leaders lying about taxes

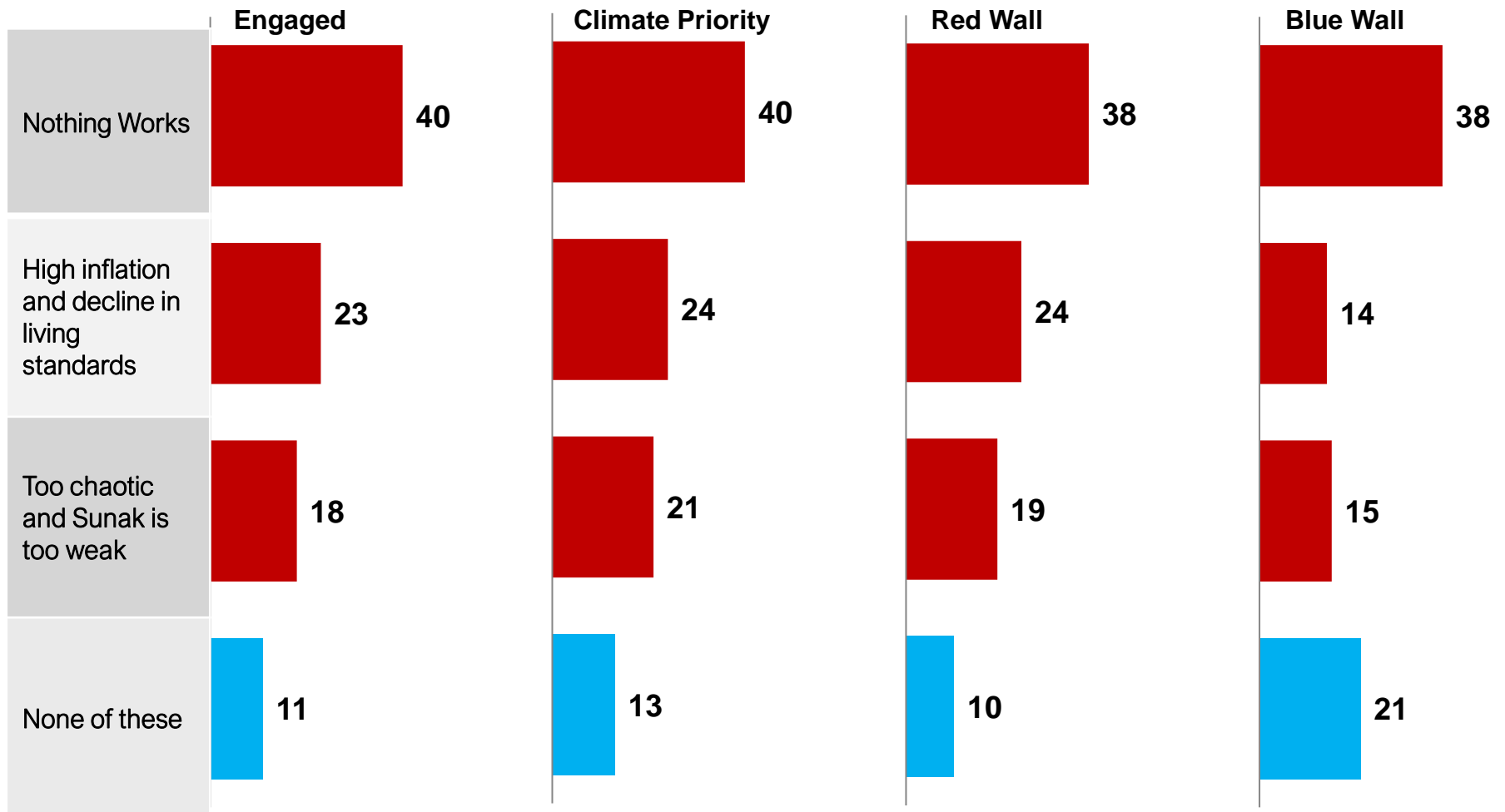
18

None of these

11

# All targets feel like nothing works

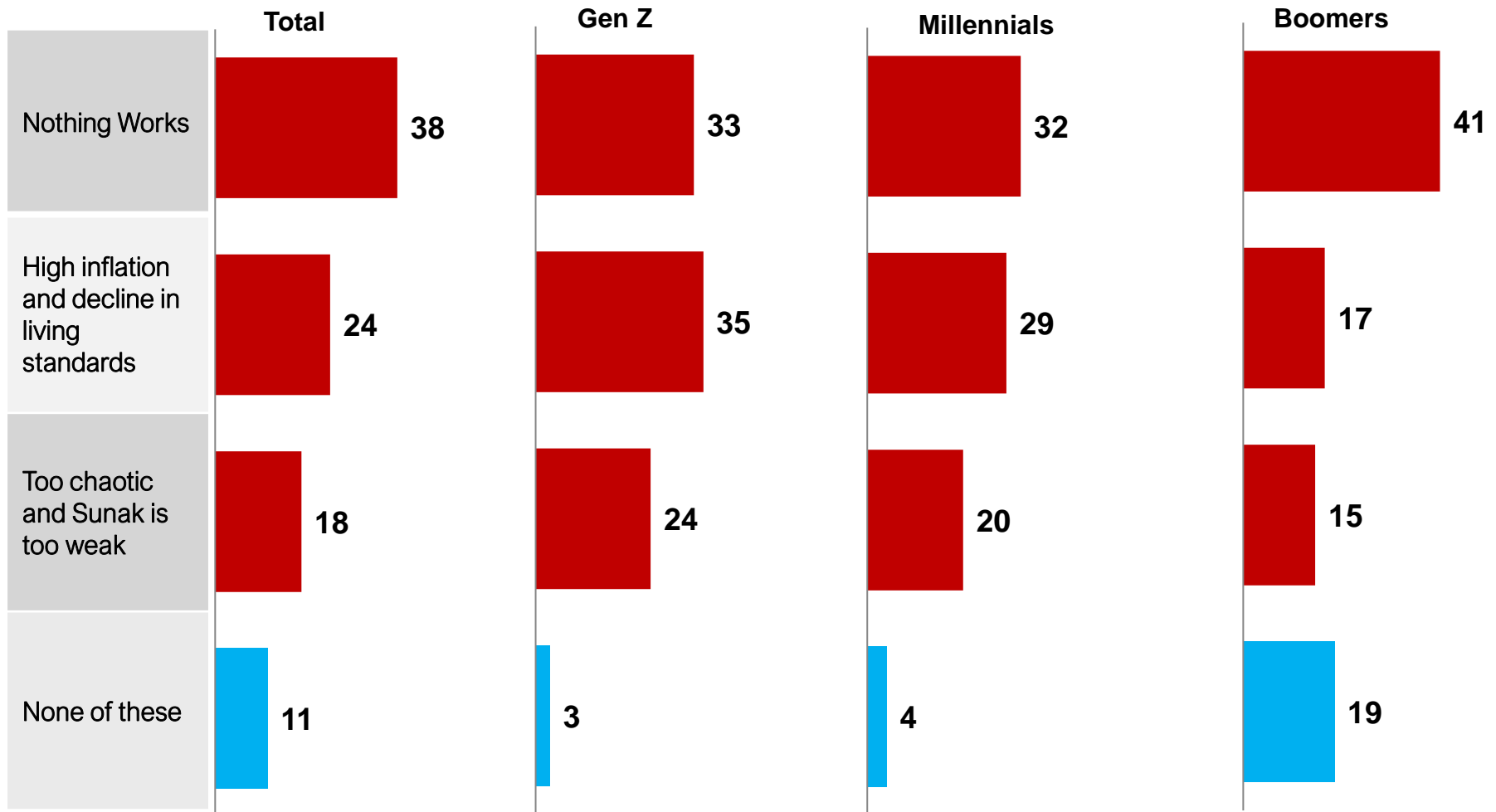
Opposition statements towards current government, total sample



Total, n=2,000

# Millennials and Gen Z put their living standards & a non-functioning government at parity, while older Britons consumed with nothing works

Opposition statements towards current government, total sample



Total, n=2,000



# Most popular Labour proposal is Improvements to the NHS and cutting health inequalities, followed by clean energy superpower and reforming police

List and goals from the Labour Party, total sample

Improve the NHS by speeding up treatment, reducing preventable illnesses, and cutting health inequalities

67

Make Britain a "clean energy superpower", removing fossil fuels from all of Britain's electricity generation by 2030

34

Reform the police and justice system to prevent crime, tackle violence against women, and stop criminals getting away without punishment

34

Raise education standards everywhere and preparing young people for work and life

23

Secure the highest sustained growth in the G7 group of rich nations by the end of Labour's first term with good jobs and productivity growth across the country

21

# Top climate and energy policies are freezing energy bills, followed by dumping, home insulation and Great British Energy

Importance of **climate policies** from the Labour Party, total sample

Top 5

Freeze energy bills by implementing a windfall profits tax on oil and gas companies

45

Safeguard nature with a clean air act and crack down on sewage dumping in rivers and seas

32

A £60bn plan to insulate 19 million UK homes over the next decade, permanently saving about £1,000 per household on energy bills

31

Establish "Great British Energy", a new, publicly-owned clean energy generation company that will provide additional energy production capacity and deliver energy independence

31

Double onshore wind power generation and triple solar power generation

29

# Building three gigafactories, green hydrogen and green steel were lowest priorities. Do people understand these terms?

Importance of **climate policies** from the Labour Party, total sample

**Bottom 5**

Deliver a fossil fuel free electricity system by 2030, with 100% of energy generated from renewable or nuclear sources

25

Create 1 million new green jobs, including plumbers, electricians, engineers, and technicians

23

Support manufacturers to adopt green steel technology, to reduce carbon emissions and end reliance on fossil fuels

17

Boost fledgling "green" hydrogen technology, through the national wealth fund

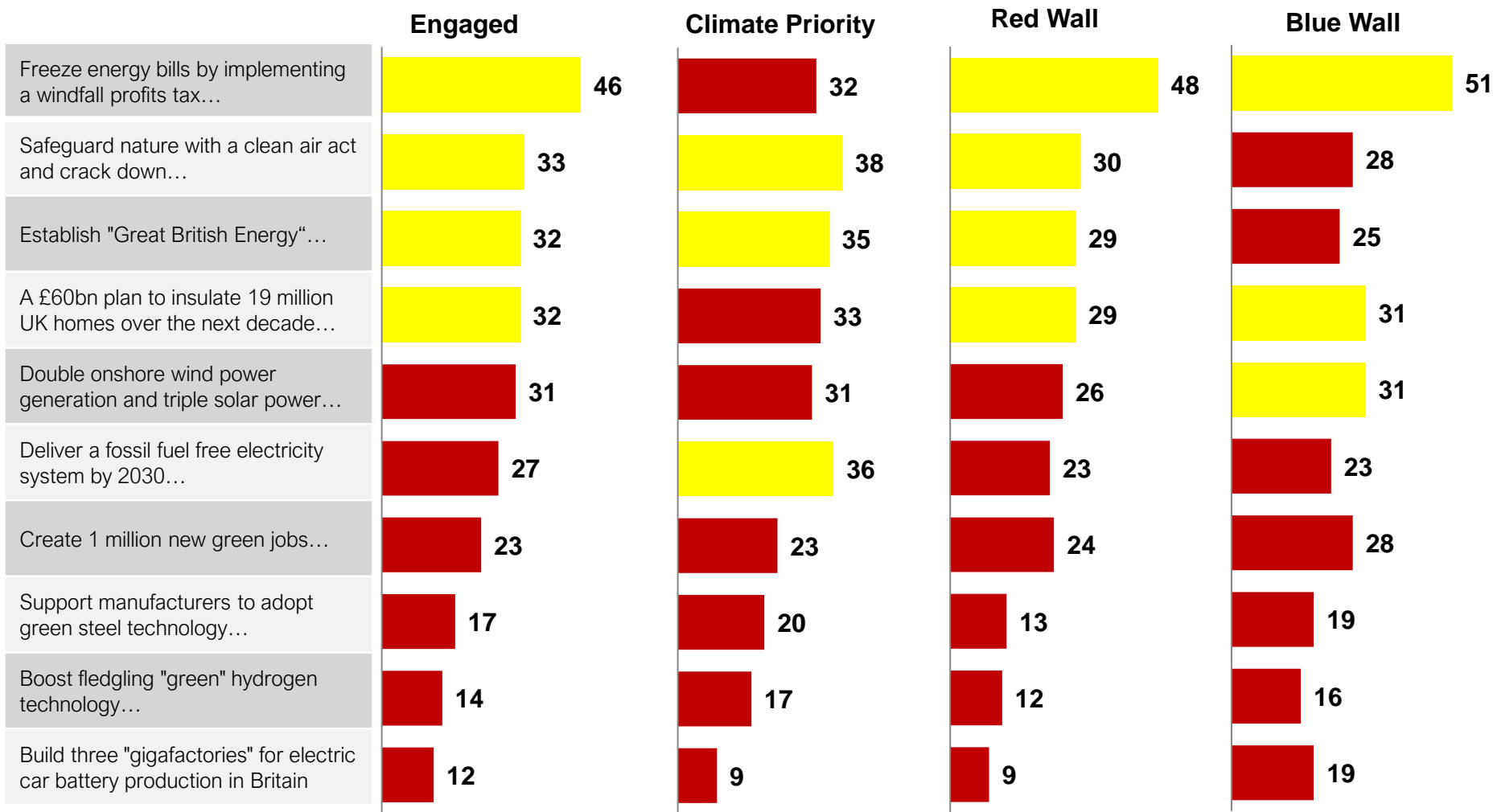
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Build three "gigafactories" for electric car battery production in Britain

12

# Freezing energy bills most popular policy for all targets, followed by crackdown and Great British Energy

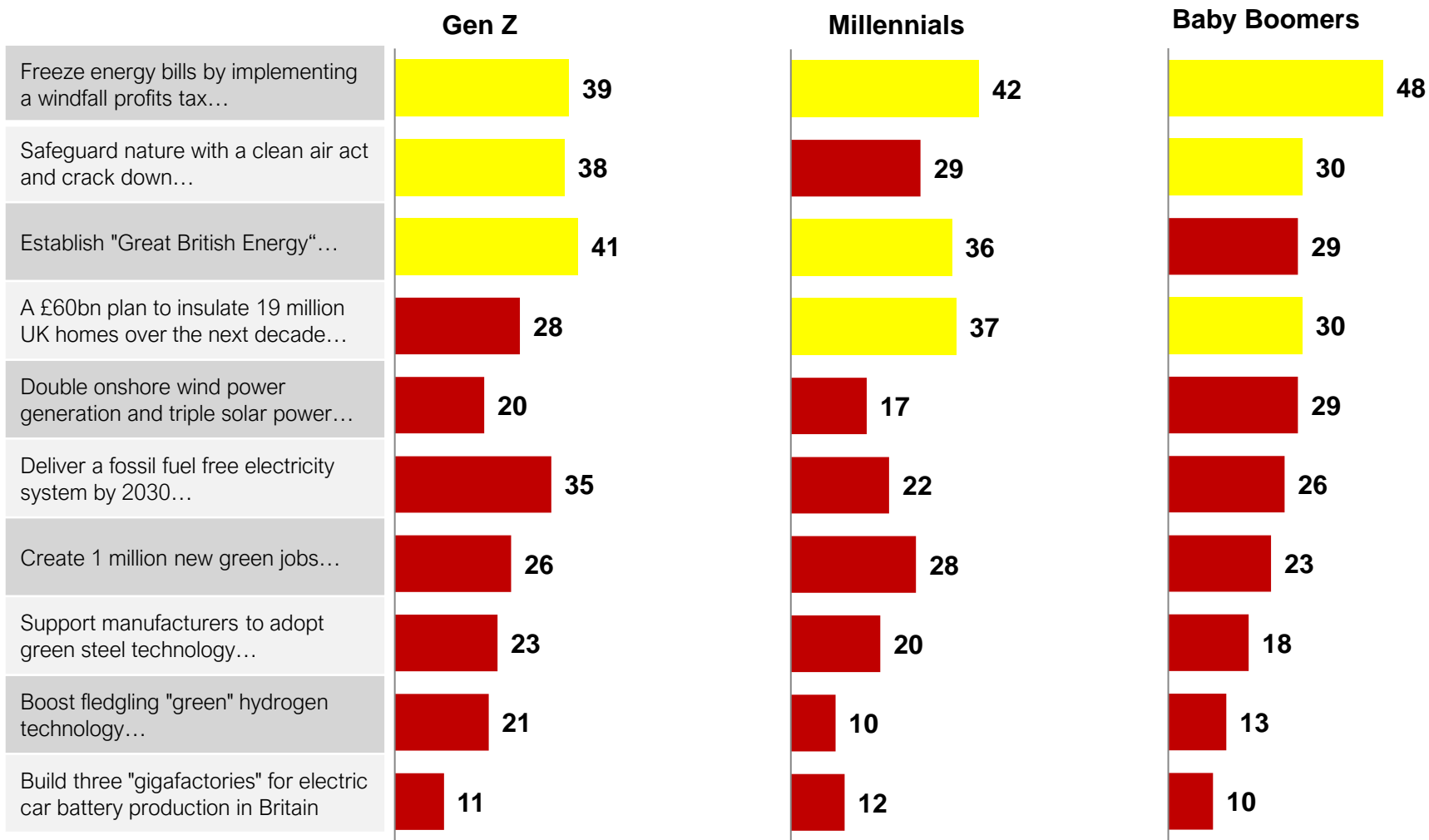
Importance of **climate policies** from the Labour Party, by target ■ = Top 3



Total, n=2,000; Engaged, n=1,395; Climate Priority, n=383; Red Wall, n=306; Blue Wall, n=139

# Freezing energy bills popular policy for all ages, Great British Energy most popular among young

Importance of **climate policies** from the Labour Party, by target ■ = Top 3



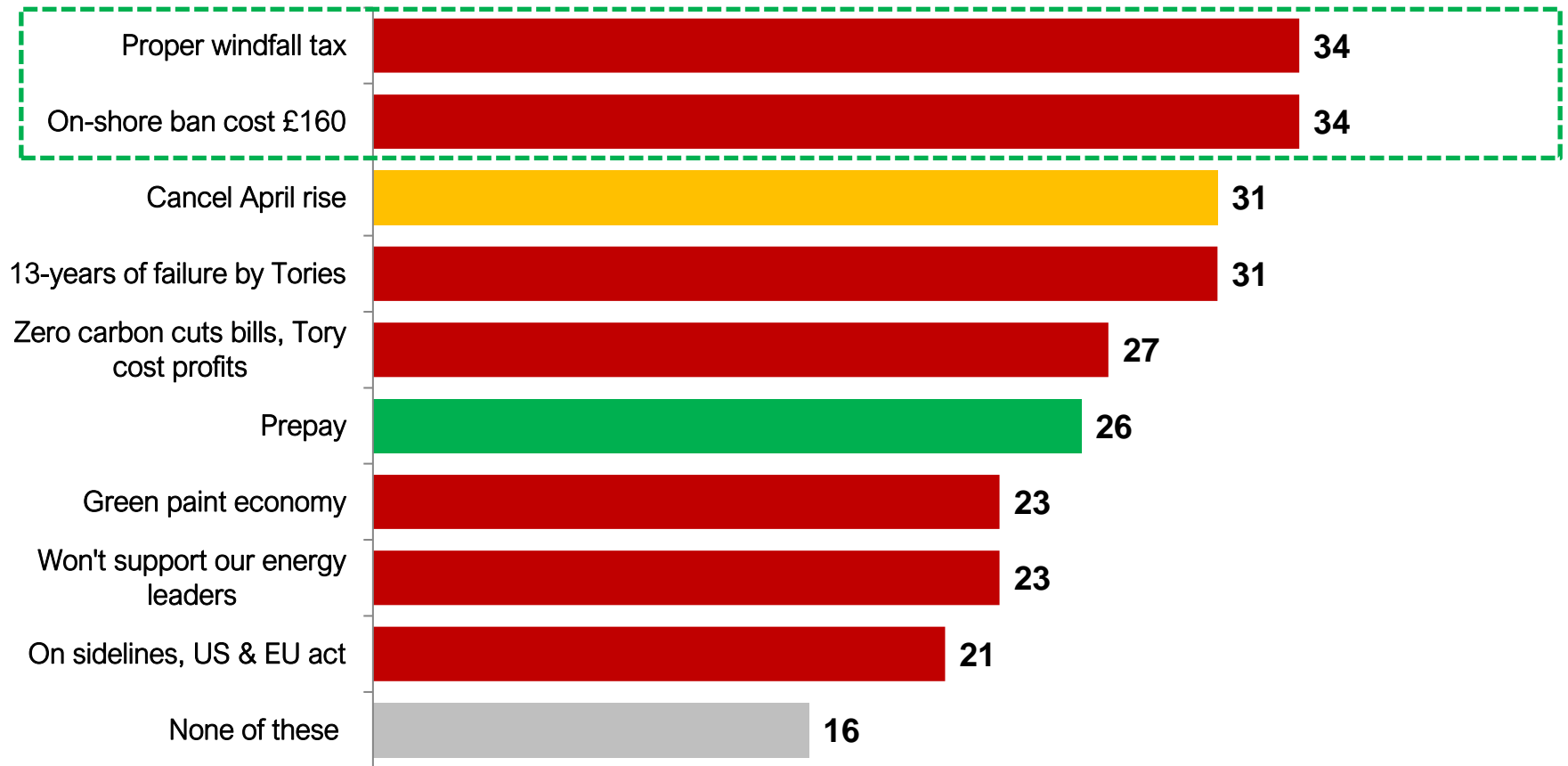
Total, n=2,000; Engaged, n=1,395; Climate Priority, n=383; Red Wall, n=306; Blue Wall, n=139

# Party messages opposing the government: full wording

<b>Proper windfall tax</b>	Labour says: The government is still letting fossil fuel companies make bumper profits. Labour would levy a proper windfall tax to tackle the cost-of-living crisis, because it is only right that companies making windfall profits from the proceeds of war pay their fair share.
<b>On-shore ban cost £160</b>	Labour says: The current ban on onshore wind has raised bills by £160 for every family because a few Conservative backbenchers don't like the way turbines look. Labour would lift the ban, cut bills, and give us more energy security.
<b>Cancel April rise</b>	The Liberal Democrats say: Oil companies are raking in huge profits from Putin's illegal invasion of Ukraine while families choose between eating and heating. Sunak has ignored calls for a proper windfall tax. He needs to cancel the energy bill rise in April.
<b>Thirteen year of failure by Tories on energy</b>	Labour says: It wasn't Putin's war that caused home insulation rates to collapse. It didn't cause a decade of inaction on nuclear and renewable energy. It didn't close British gas storage facilities. Those are the consequences of thirteen years of Tory failure on energy policy. And we are all paying the price.
<b>Zero carbon cuts bills Tory cost profits</b>	Labour says: With our plans for zero carbon by 2030, we can cut bills, enhance our energy security, create jobs, and tackle the climate crisis. The Tory delay is costing you money in higher bills, while subsidising massive profits for the oil and gas companies.
<b>Prepay</b>	The Green Party says: Rather than allowing energy companies to force more people on to pre-payment meters, the government should role out insulation to all households. This government is doing everything it can to ignore straightforward answers for this cost-of-living crisis.
<b>Green paint economy</b>	Labour says: The Climate transition isn't about putting a lick of green paint on a stagnant economy. It's about new jobs and new industries, lower bills, higher living standards, and economic growth. We know some country will lead on clean energy. Why not Britain?
<b>Won't support our energy leaders</b>	Labour says: From the world's biggest offshore wind farm near Yorkshire, to Rolls Royce developing carbon neutral aviation in Derby, to or our world-leading green hydrogen technology in Sheffield - the potential is there, but our government just complains from the sidelines.
<b>On sidelines while US an EU act</b>	Labour says: President Biden is powering ahead to fight for jobs in America. The EU is fighting for jobs there, but Britain under the Tories is getting left behind. With Great British Energy, our plan for a publicly owned energy company, we will make the jobs of the future here.

# Attacks on proper windfall tax, ban on onshore wind cost, ending April support and 13-years of inaction on energy had strongest impact

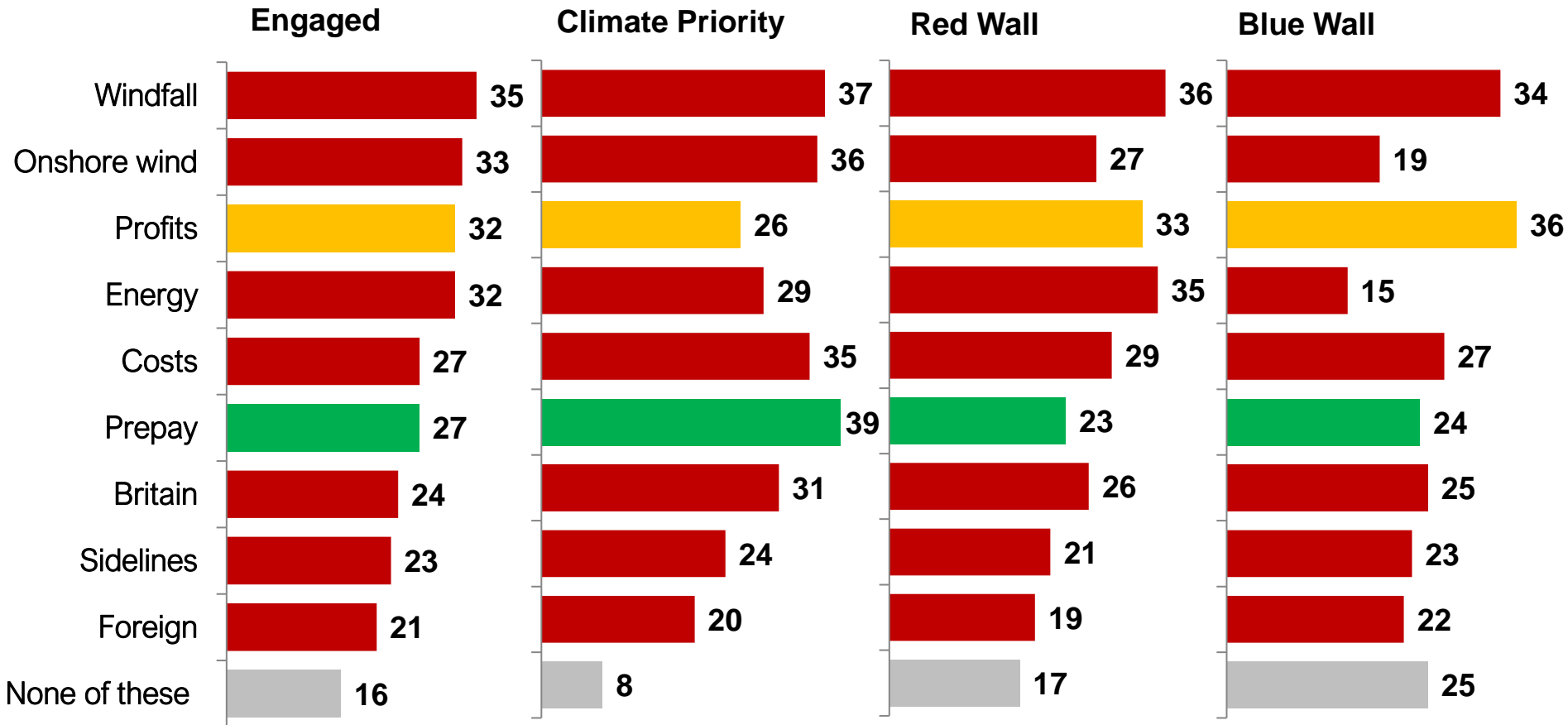
Political messages opposing the government's climate policy, total sample



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

# Attacks on proper windfall tax & 13-years of Tory inaction hits engaged and Red Wall targets; cancelling rise in bills important for Blue Wall

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?

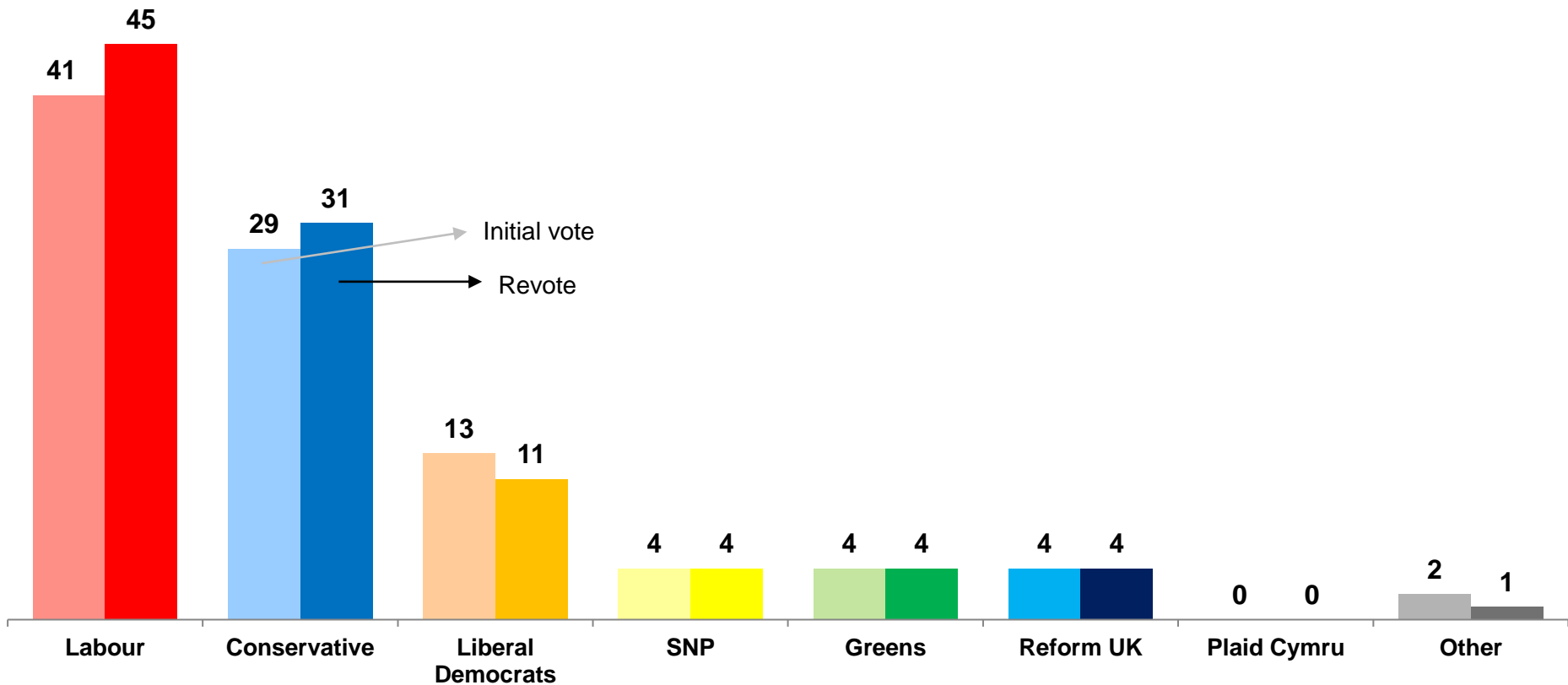
Total, n=2,000; Engaged, n=1,395; Climate Priority, n=383; Red Wall, n=306; Blue Wall, n=139



# Poll conducted right before local elections; Labour's 12-point lead grows to 14 points after hearing full government & Labour agenda

Voting intention with "don't know" allocated, among likely voters

■ Initial Vote ■ Revote



*If there was a general election tomorrow, for which party would you vote?*

**CLIMATE**  
*Policy & Strategy*

Climate Policy & Strategy: Great Britain  
Tracking survey, May 2023

