

# **CLIMATE** *Policy & Strategy*

**Global comparisons on climate change**  
**Summary of tracking surveys in key countries**  
**June 2023**



# What this is based on

## Our poll

- Three nationally representative, N=2,000 surveys: of Great Britain, the US and Germany
- GB fieldwork: 19 – 27 April 2023
- US fieldwork: 27 April – 3 May 2023
- Germany fieldwork: 5 – 22 May 2023
- Online, 20-minute questionnaires
- Weighted to national demographics and past voting behaviour

Each country has a detailed report with analysis across several key target groups.

This report draws together global themes, findings and implications for policy and messaging, for leaders in politics, policy and business.

# What you need to know (1/2)

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- The rising cost of living, inflation and economic issues are all-consuming in All 3 countries. Crime pushes into the top problems in the US, the NHS in the UK, and pensions in Germany. The cause of high prices are mostly global, but also by excessive-profit-taking by oil and other companies and government spending in the US and Germany. But cost pressures dominate all else.
- The citing of profiteering is part of a strong anti-corporate thread. The publics are hostile to CEOs of major companies and a growing proportion want to raise taxes on companies. Among the most popular policies across countries is raising corporate taxes and putting a windfall profit tax on energy and oil companies and using the funds for households
- Climate change ranks with health care and immigration for Americans, for Britons it falls with immigration and housing as a problem, while in Germany it ranks in the top 5 with housing and healthcare. However, Big majorities in all countries agree it requires major action despite the cost. Big stable majorities in all 3 want more measures to prevent climate change.
- In the US, UK and Germany, the public thinks government should support both new oil and gas developments and low carbon projects. In the UK and Germany, half or nearly half, now choose the latter. CEOs gain standing when they say climate is a crisis and must change the way they do business.
- The strategic landscape has changed, with deep hostility to Russian, along negative views of China. That impacts views on energy and the energy transition.

# What you need to know (2/2)

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- The fossil fuel sector is more popular in the US than in the UK and Germany. That is produced by Republicans who are at parity with the Democrats in the electorate. The US looks very favorably on nuclear, natural gas companies, EPA, and environmental regulations. The fossil fuel sector gets modestly cool ratings, with China and Russia competing for most detested. The UK's and Germany's most negative ratings are reserved for those nations, along with the oil companies. BP, Aral, and Extinction Rebellion have like ratings in the UK and Germany. That has dragged down ratings of environmental groups in the UK. Environmental NGOs and Greenpeace are seen favorably in Germany. Nuclear is very popular, along with policies to enhance environmental enforcement.
- The partisan polarization is key to consider, though climate is different than other “woke” issues. Driving change are the more than 3/4ths of Democrats, Labour, Liberal Democrats, Green (UK and Germany) and SPD voters who say a crisis, along with 60% of Conservative Party and CDU/CSU voters. But in the US, half of independents and moderate Republicans and over a quarter of conservative Republicans also see a crisis. That means only a small minority think business should not be addressing.
- The public continues to oppose taxes on household carbon emissions, preferring instead that government regulate the emissions of companies and implementing taxes on high polluting industries.
- The public in both countries sees a tax on burning coal, oil and natural gas as something that would hurt ordinary people rather than an encouragement.

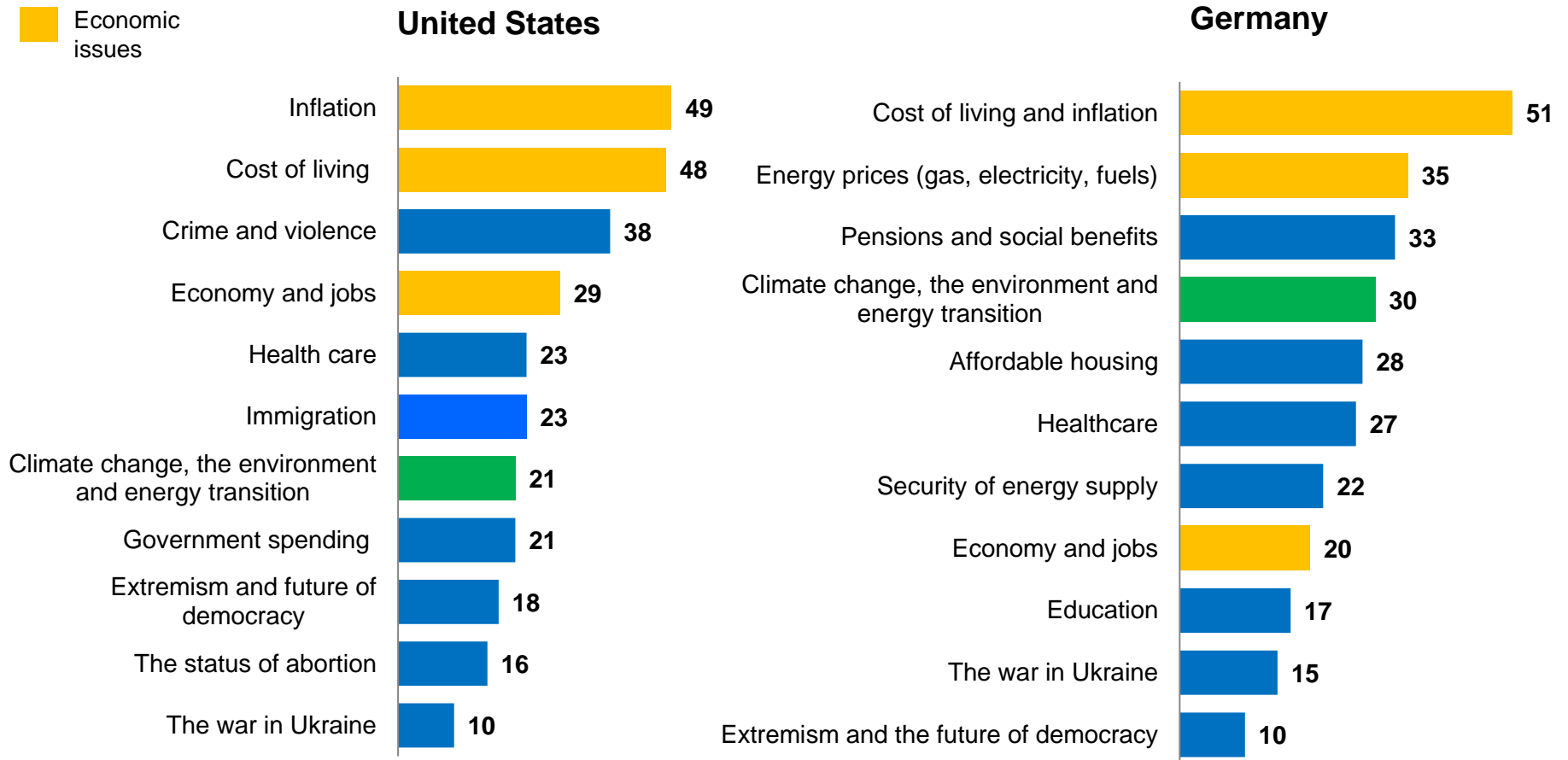
# Climate Context

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# Cost of living and inflation listed as top priorities in both the US and Germany; climate at level of immigration and of health in US

Priorities for government, by country



Please mark the THREE issues you think are most pressing for the United States.

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

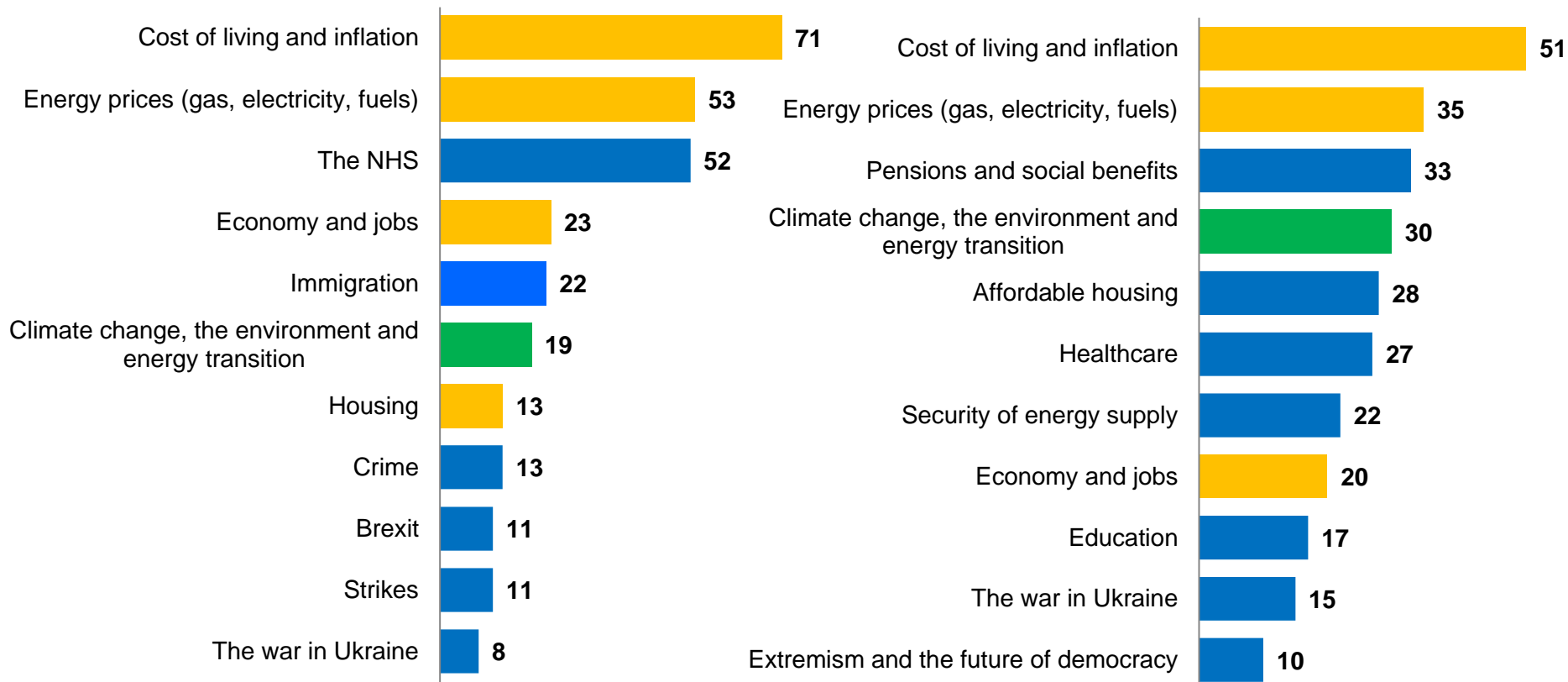
# Cost of living and inflation top priority in Germany; climate change higher priority in Germany than US and UK

## Priorities for government, by country

■ Economic issues

### Great Britain

### Germany



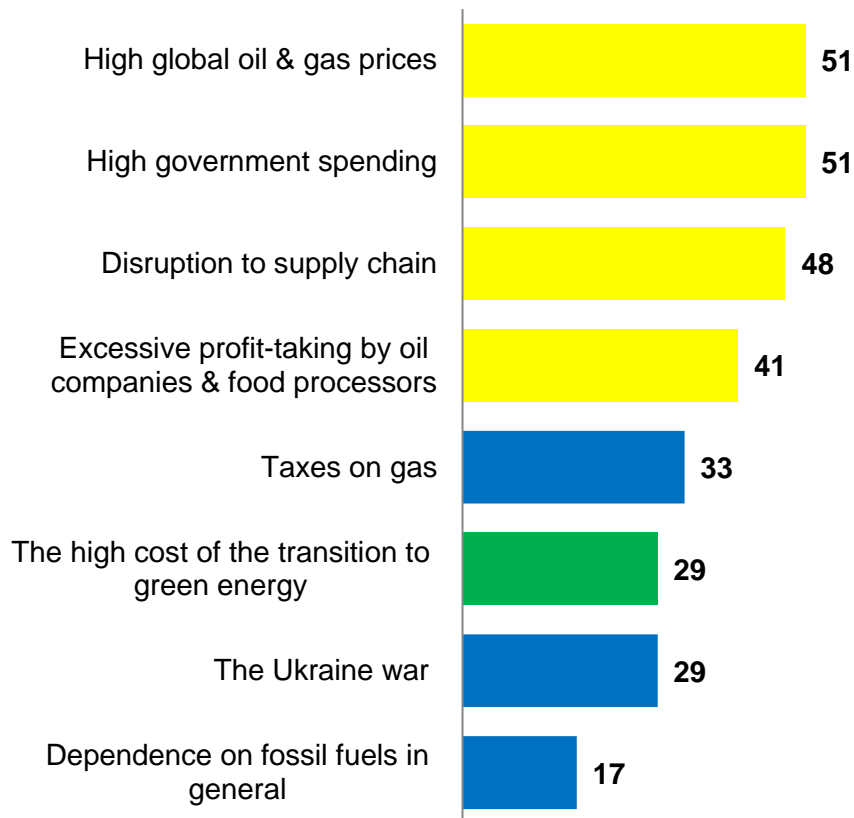
What are the *THREE* issues you think should be the top priorities for government?

Total sample, n=2,000/country

# Why high prices? In the US, high global oil/gas prices & government spending; in the UK, high global prices & Ukraine, joined by excessive profit taking

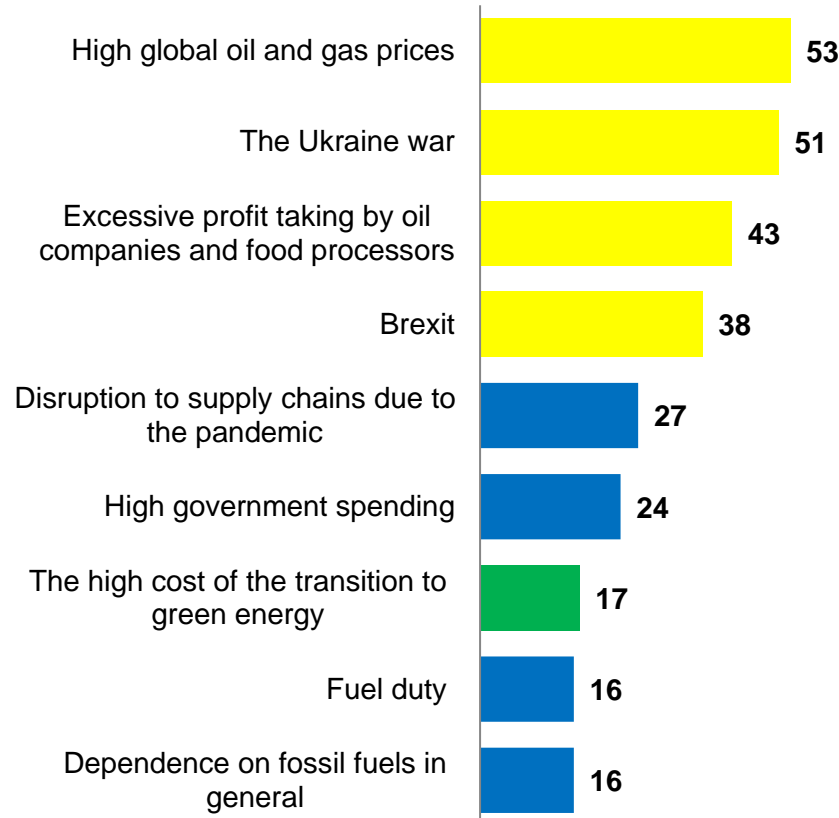
Reason for increased prices, by country

## United States



Top 4 reasons

## Great Britain



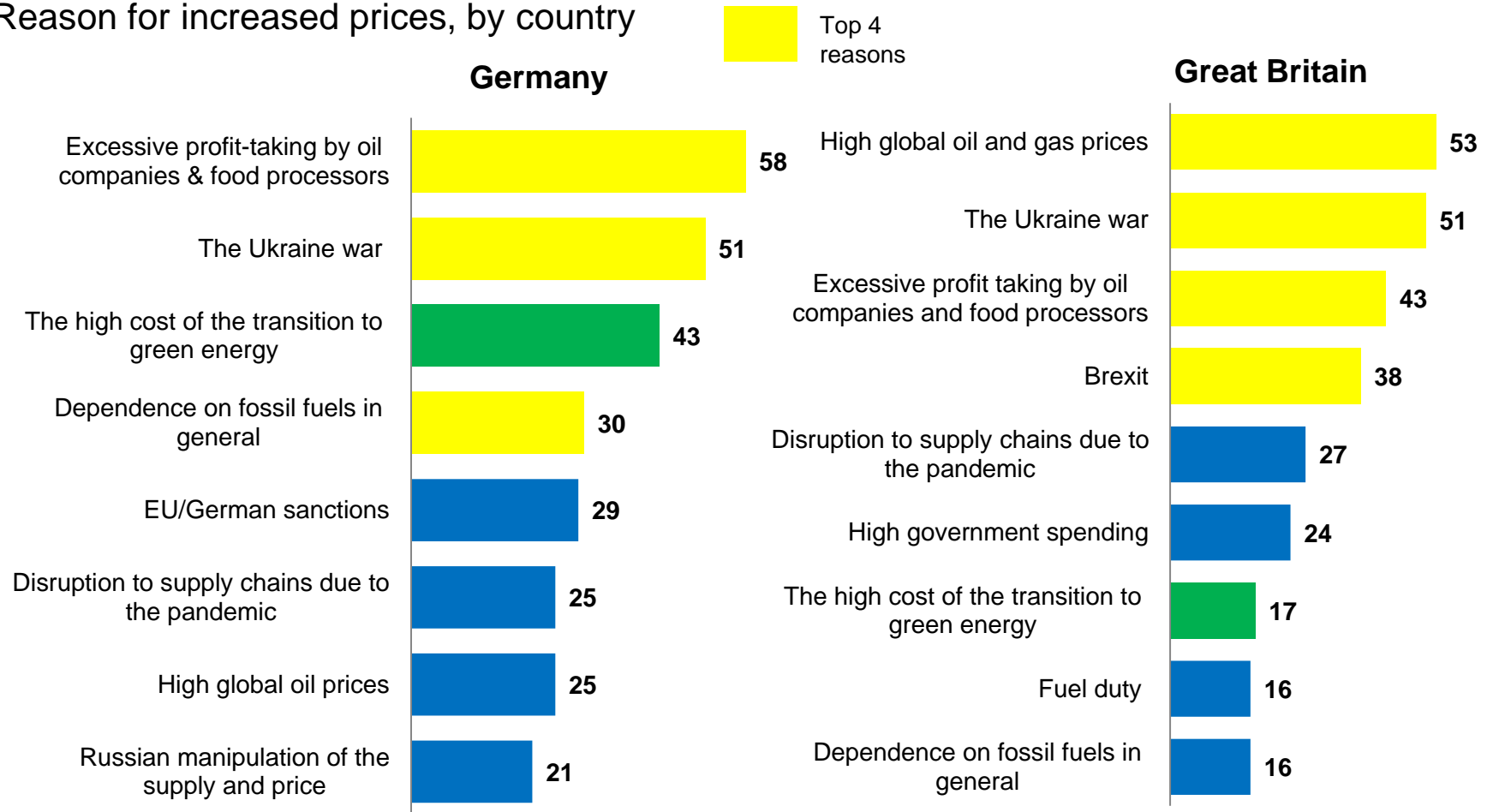
You may have noticed increased prices recently, particularly for energy and food. Why do you think prices are high today? Please select the THREE most important reasons from the list below.

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



# In Germany, excessive profit taking dominates reason for prices, followed by Ukraine war, but only one where cost of green transition a major factor

Reason for increased prices, by country



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

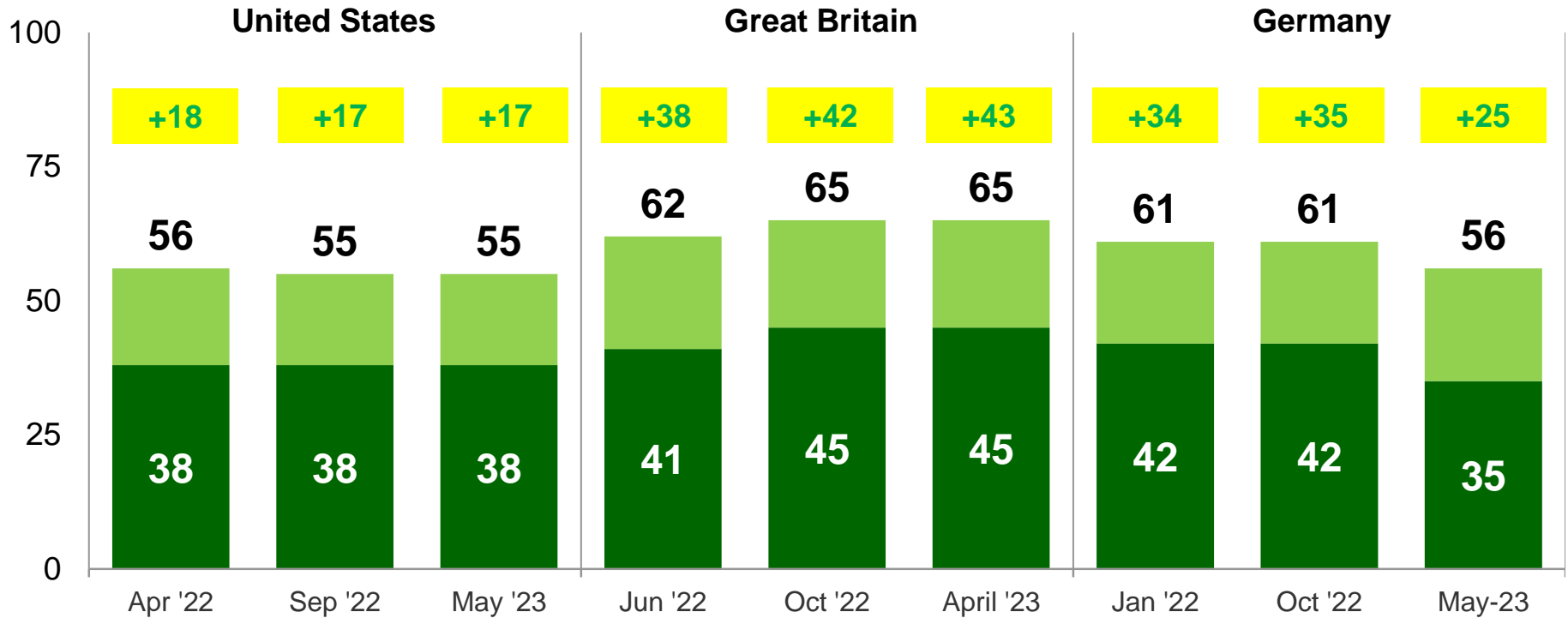
# In all three countries, climate change is seen as a threat and needs major action, but now Germany looks more like the United States

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

Difference: Statement 1 minus Statement 2

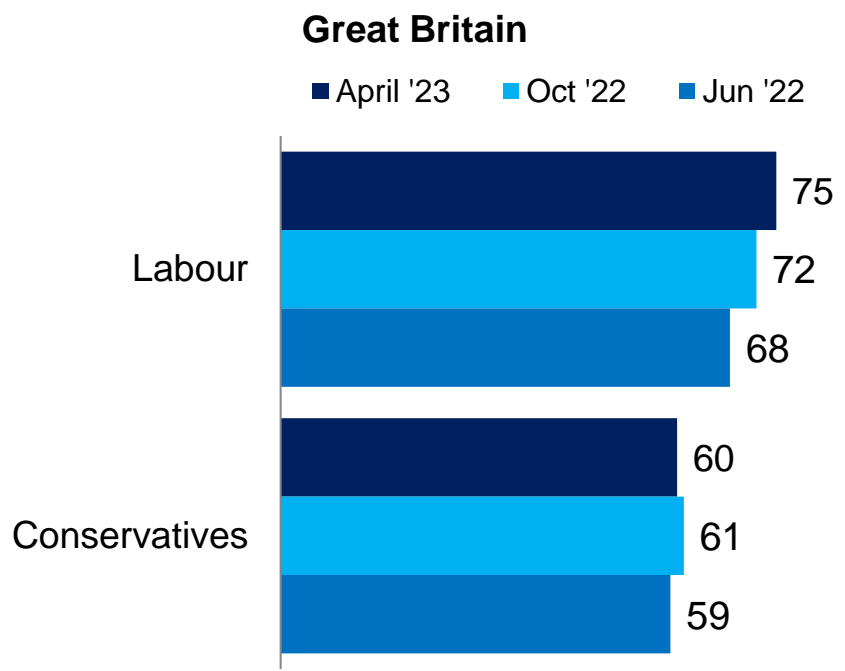
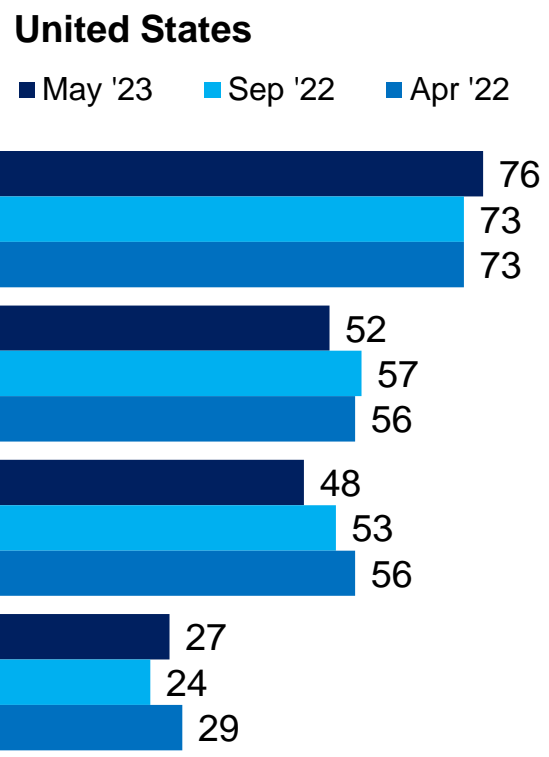


On the following pages are some pairs of statements. For each, please indicate whether the FIRST statement or the SECOND statement comes closer to your views, even if neither is exactly right.

Total sample, n=2,000/country

# A growing 3/4<sup>th</sup> of Democrats & Labour voters say climate grave threat, a view joined by over half of independents & 60% of Conservatives. Partisan polarization may be growing in the US, though half of independents & moderate Republicans say a crisis

Percent choosing “Climate change is a threat and we need major action to combat it”, by Party/ideological affiliation and vote history



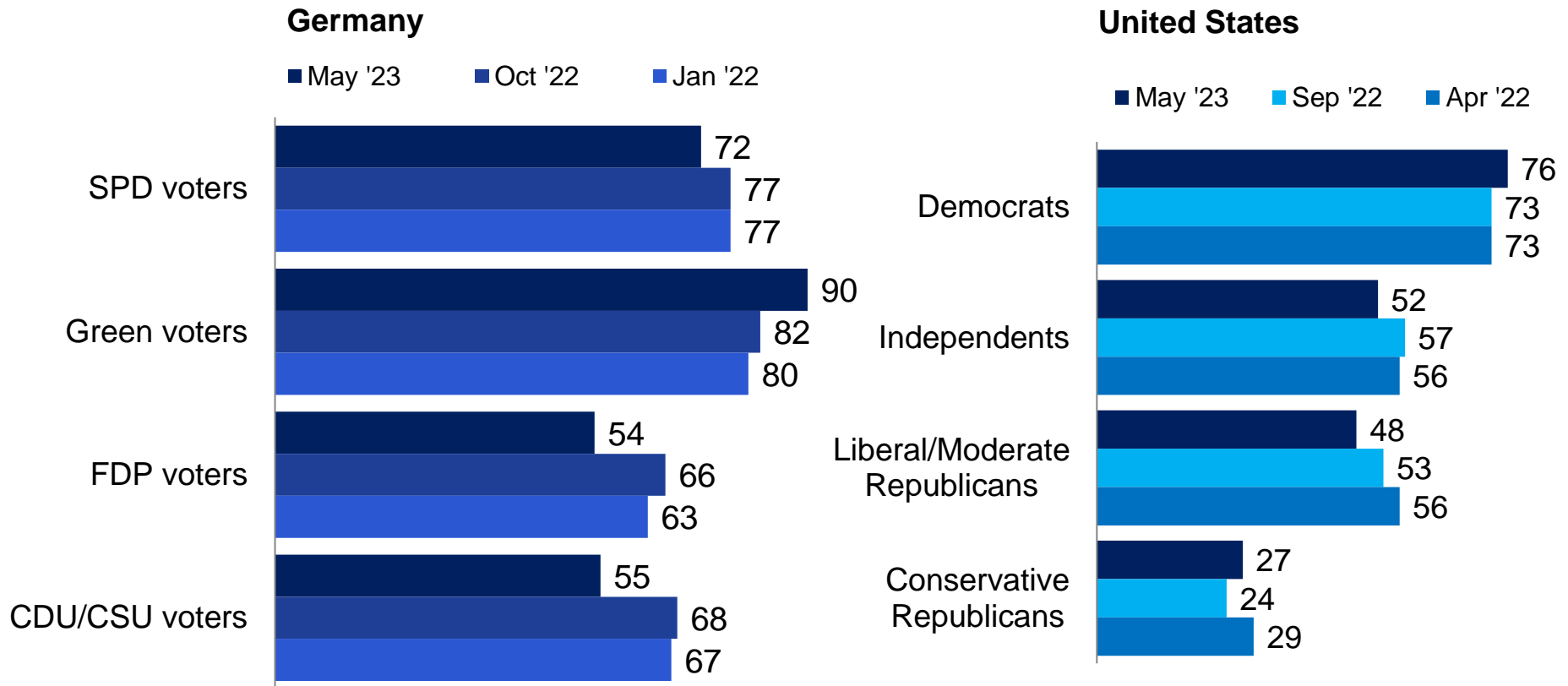
Alternate statement: “The threat of climate change is exaggerated and the high cost of fixing it may not be worth it.”

US: Democrats, n=824; Independents, n=465; Lib/Mod Republicans, n=302; Cons. Republicans, n=669

Great Britain: Labour, n=729; Conservatives, n=465

# A large majority of coalition and CDU/CSU voters in Germany see climate change as a threat that needs major action, but drop off with all parties, except Green voters

Percent choosing “Climate change is a threat and we need major action to combat it”, by vote history

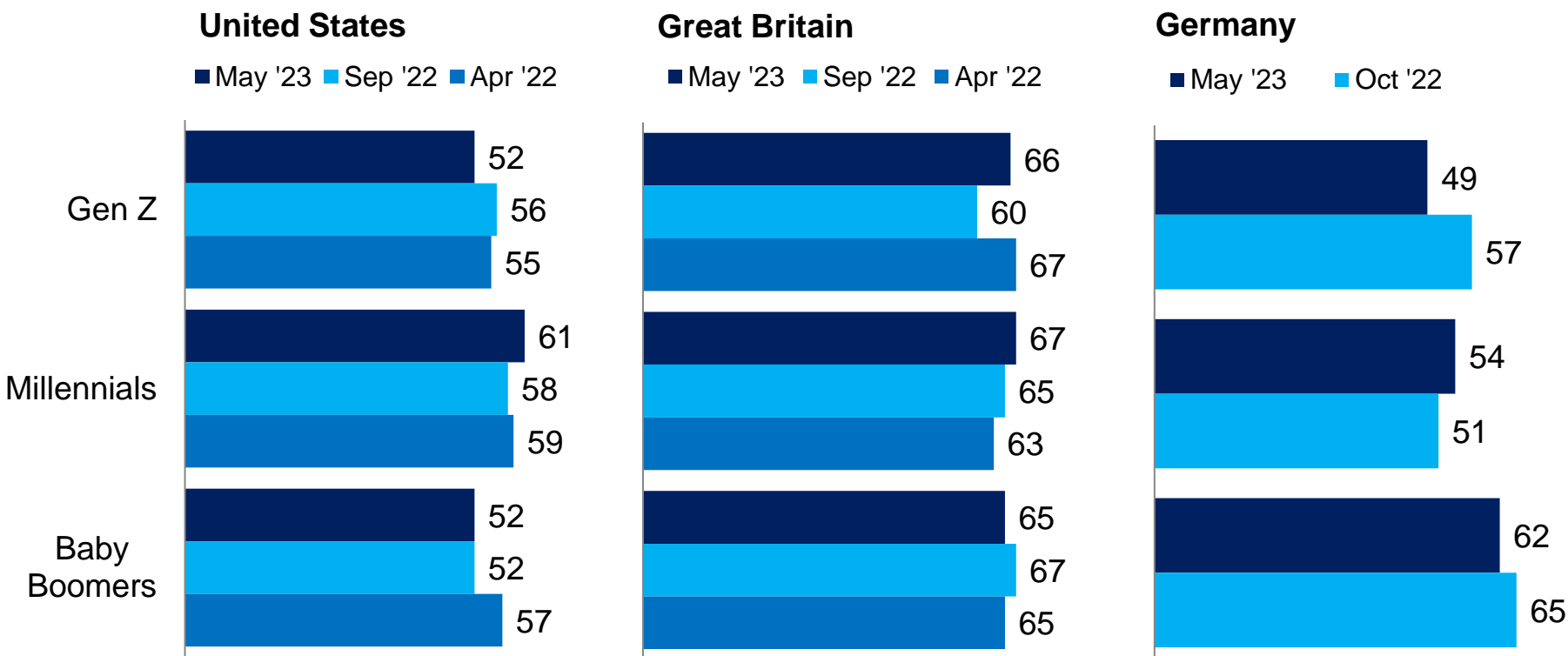


**Alternate statement:** “The threat of climate change is exaggerated and the high cost of fixing it may not be worth it.”

**Germany:** SPD voters, n=365; Green, n=203; FDP, n=156; CDU/CSU, n=343

# Millennials in the US lead on wanting bold action, while the two-thirds of all generations in UK accept it; in Germany, Baby Boomers greatest support, with Gen Z focus falling

Percent choosing “Climate change is a threat and we need major action to combat it”, by generation



Alternate statement: “The threat of climate change is exaggerated and the high cost of fixing it may not be worth it.”

**US:** Gen Z, n=261; Millennials, n=573; Baby Boomers, n=773 **Germany:** Gen Z, n=143; Millennials, n=268; Baby Boomers, n=665  
**Great Britain:** Gen Z, n=214; Millennials, n=343; Baby Boomers, n=653

# “Reducing carbon pollution” may account for why “reducing energy bills” at parity in the US, energy bills greater importance elsewhere

1) Reducing carbon pollution from energy use is more important

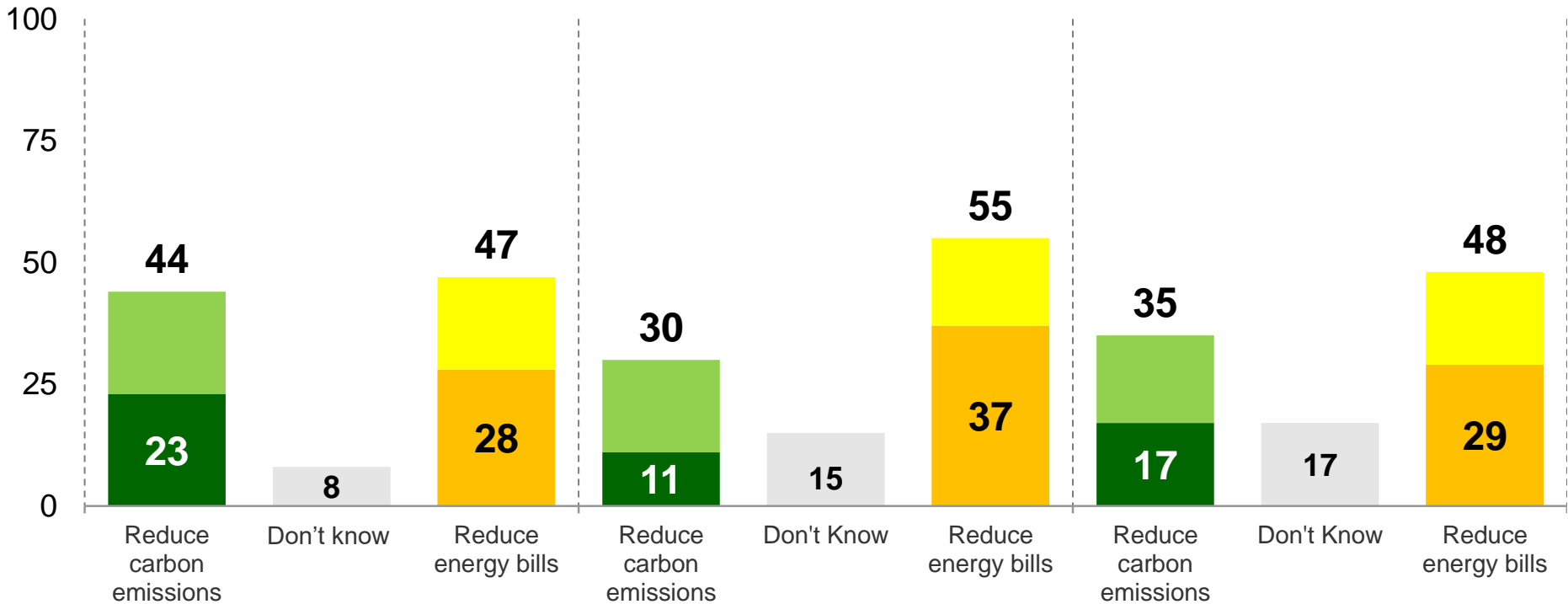
2) Reducing energy bills is more important

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

United States

Great Britain

Germany



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=2000/country

# Majority in UK, US and Germany say right for companies to factor in climate change in their investments; only small minorities say a “left woke” agenda

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

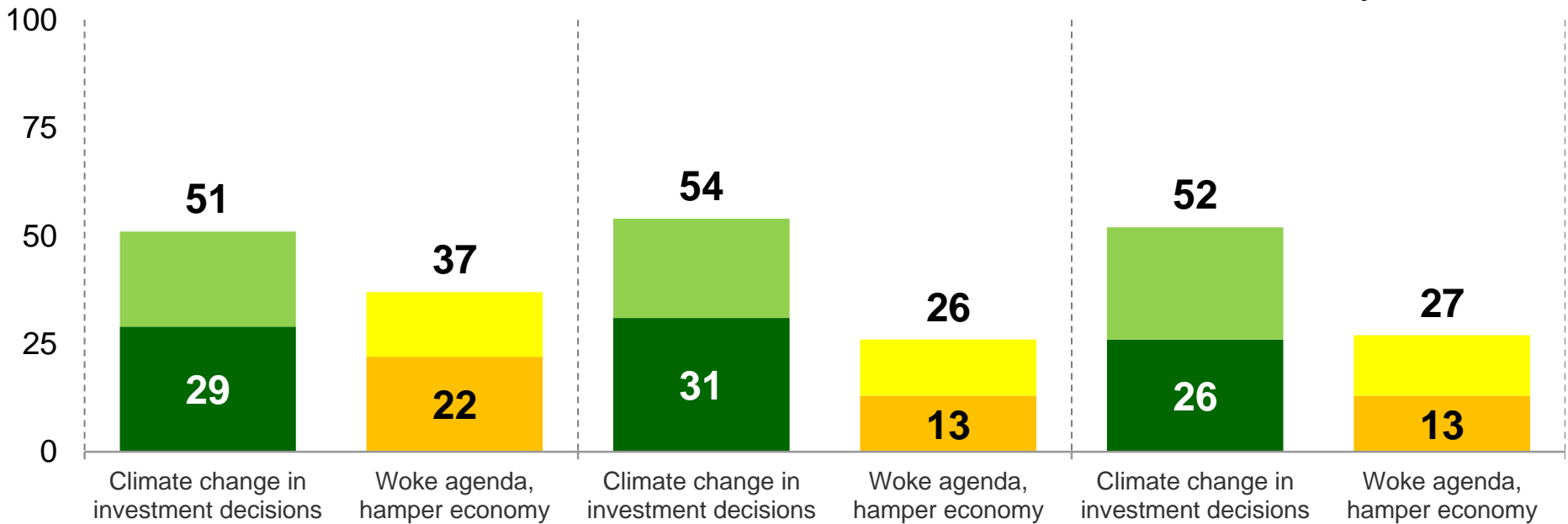
2) Bringing climate change into investment decisions is about forcing a left wing, woke agenda on companies and banks and will hamper flourishing of the economy and our ability to make correct decisions for [COUNTRY]

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

## United States

## Great Britain

## Germany



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=2000/country; asked to 1/2-sample splits

# Closer to majorities believe sound business to factor in environmental and society, only small minorities think “woke” agenda

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.

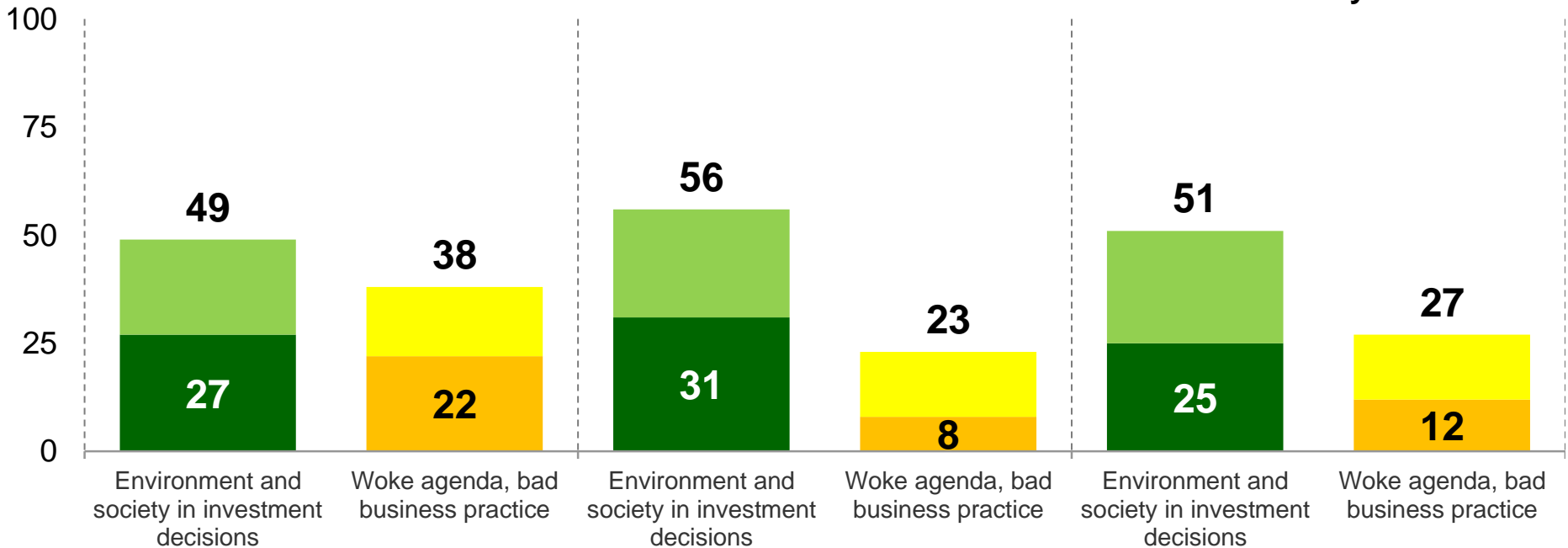
2) Bringing the environment and society into investment decisions is about forcing a left wing, woke agenda on companies and banks and is not a sound way to do business.

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

United States

Great Britain

Germany



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.

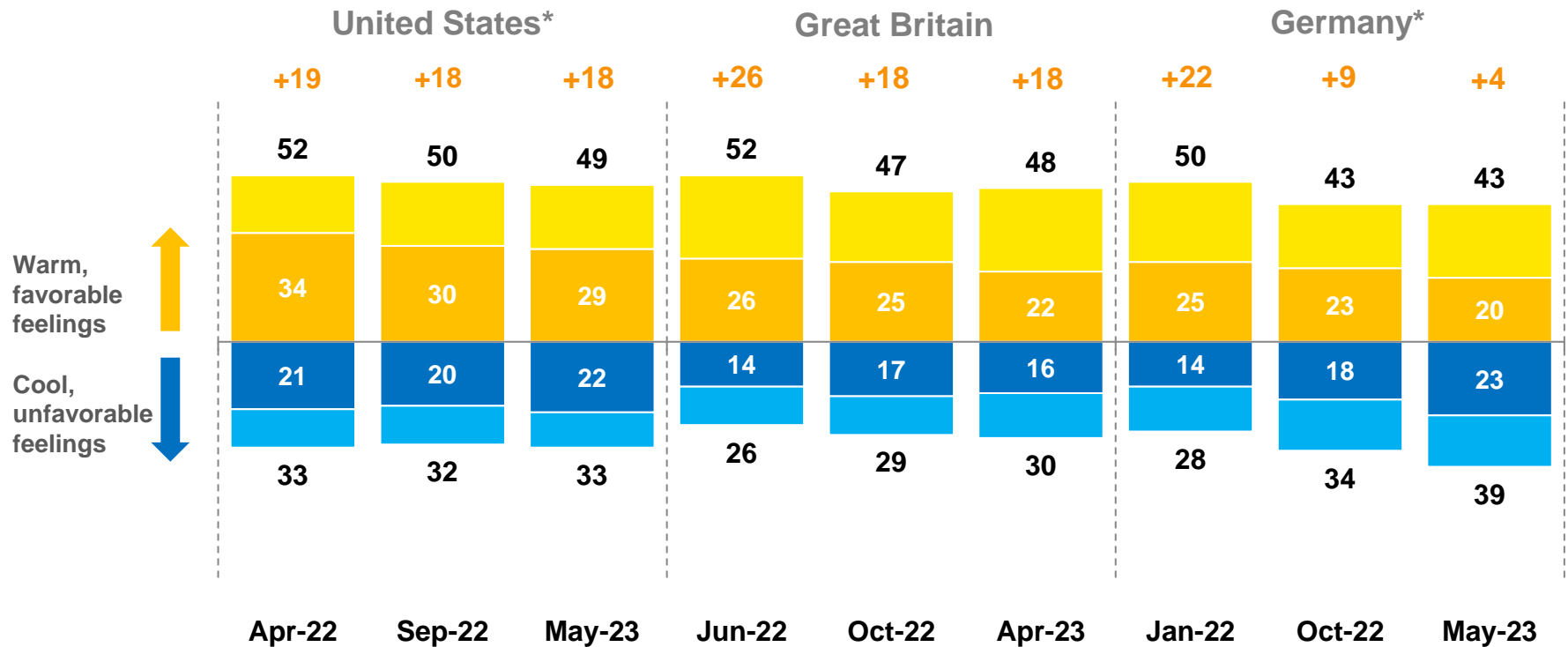
Total sample, n=2000/country; asked to 1/2-sample splits



# Strong and stable support for measures to prevent climate change in the US and UK, but steady drop in support in Germany

Measures to prevent climate change, by country

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



\*US, April-22 and Germany, Jan-22: "Measures to prevent global warming"; after September: "Measures to prevent climate change"

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/country

# Perceptions of energy & environment space

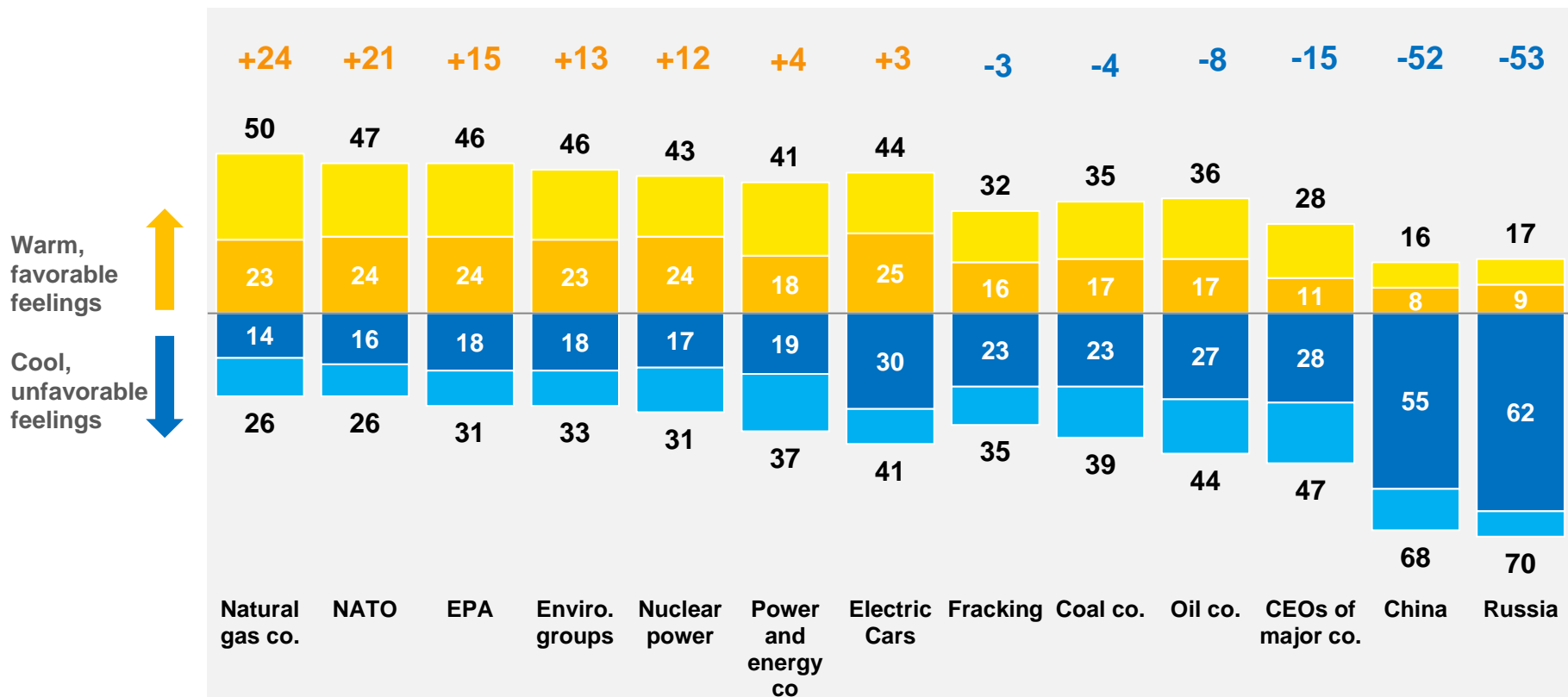
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# Natural gas companies and nuclear power viewed favorably, as is the EPA and environmental groups; people are divided on coal and fracking, negative on oil companies and CEOs; Russia and China the other pole.

Feelings toward companies and environmental actors, United States

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



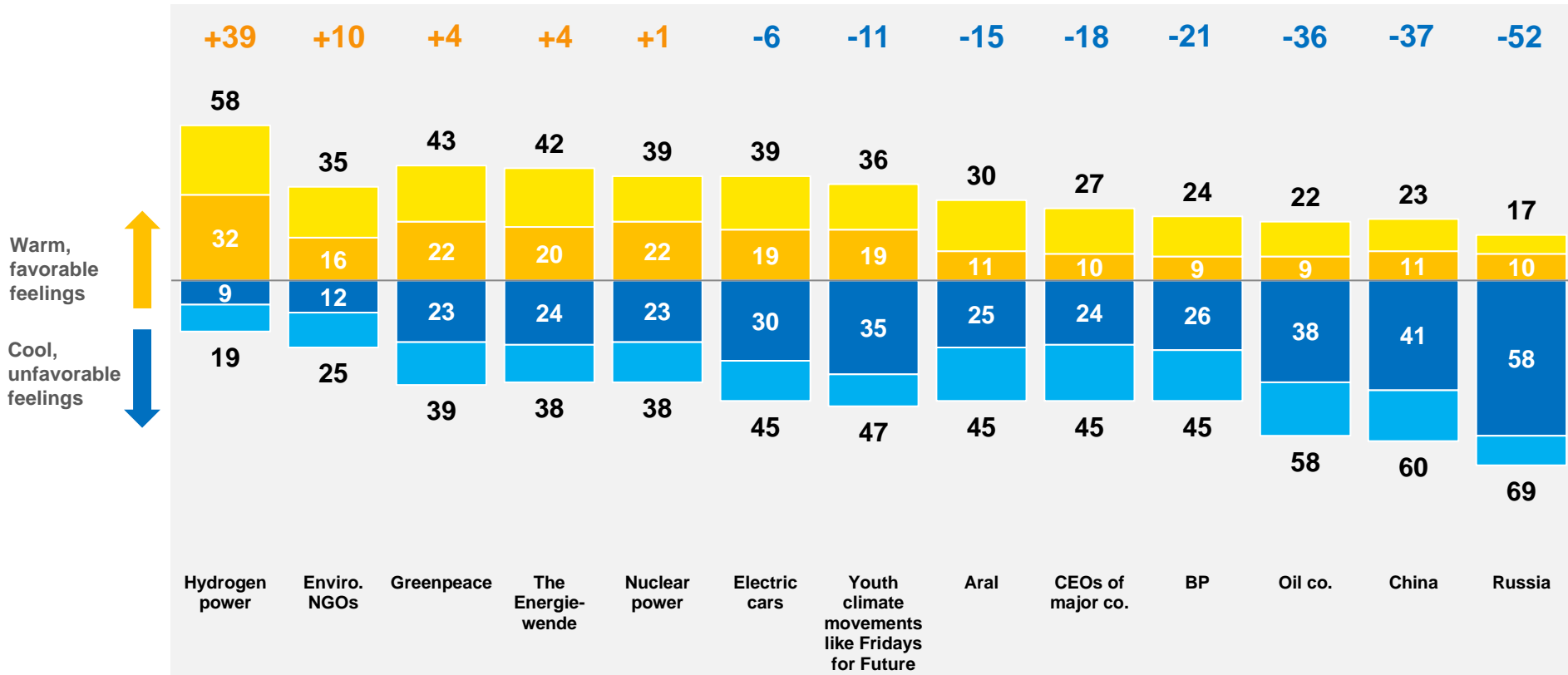
Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVORABLE feeling; zero meaning a VERY COLD, UNFAVORABLE feeling; and fifty meaning not particularly warm or cold.

Total, n=2,000; some shown to 1/2 sample

# In Germany, hydrogen power receives highest favorability and China, oil companies and Russia the lowest; divided on nuclear power and Greenpeace

Feelings toward companies and environmental actors, Germany

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

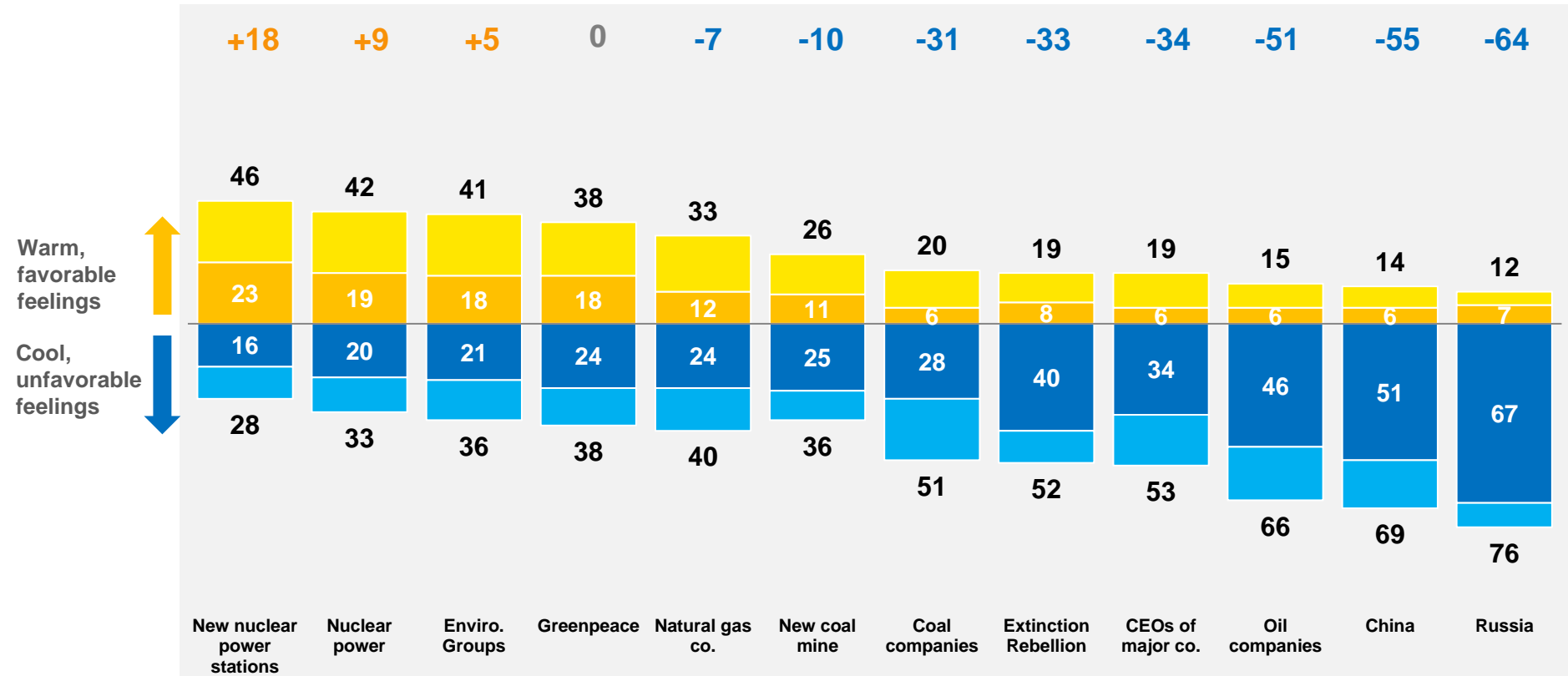


Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.

# 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

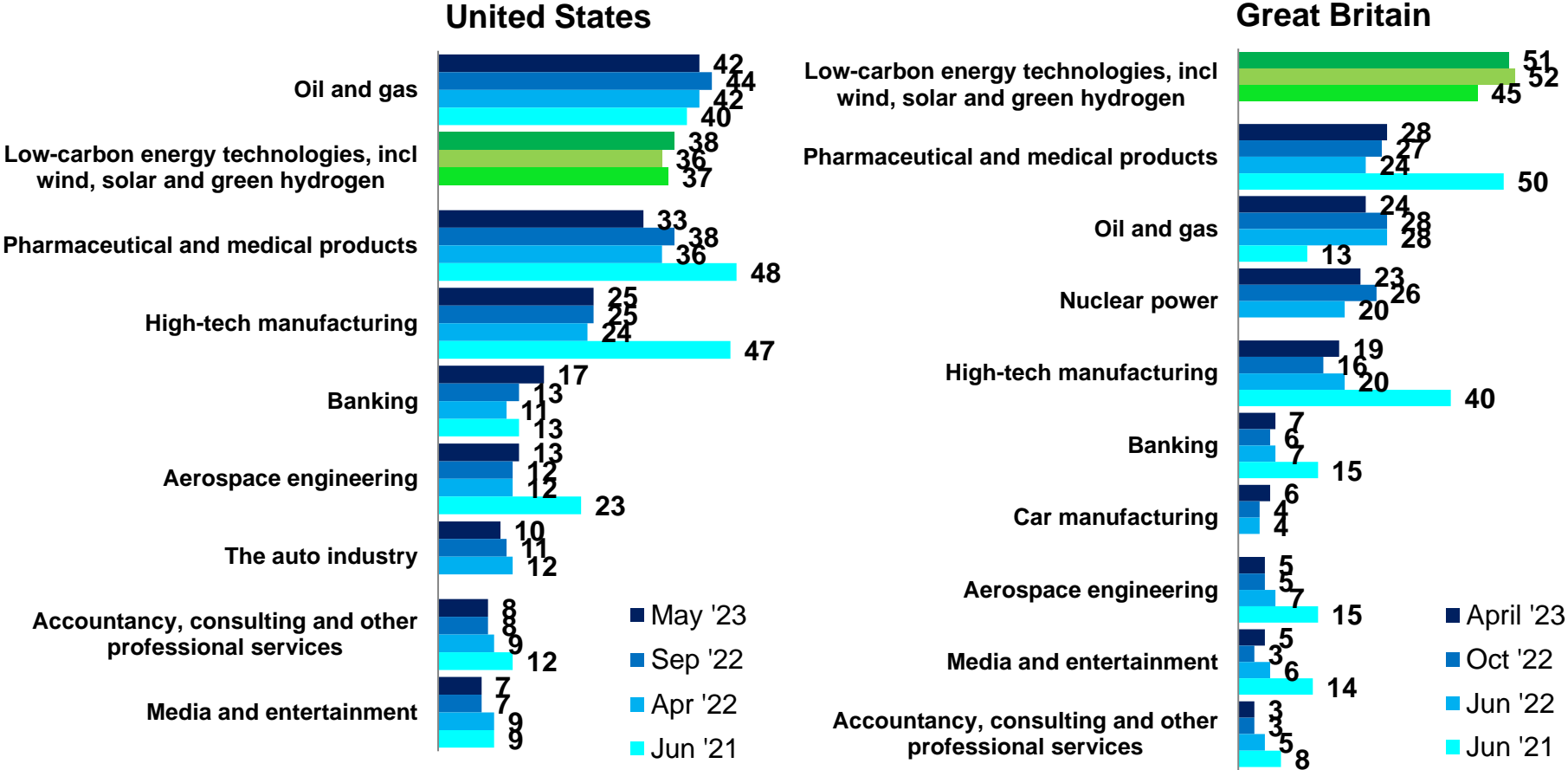
# Climate and energy policy

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# In both the US and UK, low carbon energy the top near top priority for government to support; oil and gas top in the US and a declining priority in the UK

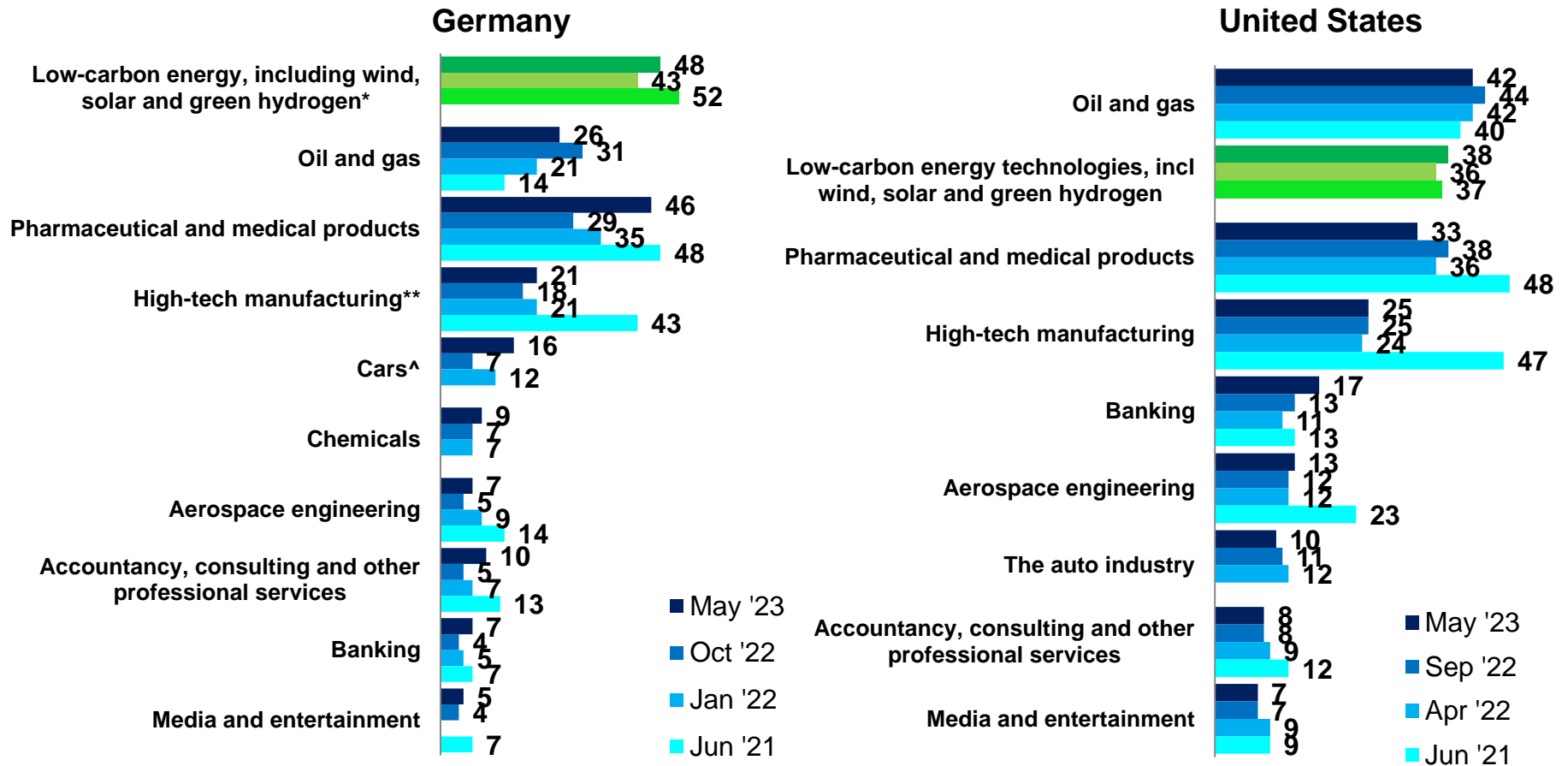
Industries that government should support, by country



Which of these industries would you MOST want the government to support and champion? Please choose two.

# A near majority of Germans rank low-carbon energy investments as their top priority, joined by pharmaceuticals, as in the US

Industries that government should support, by country



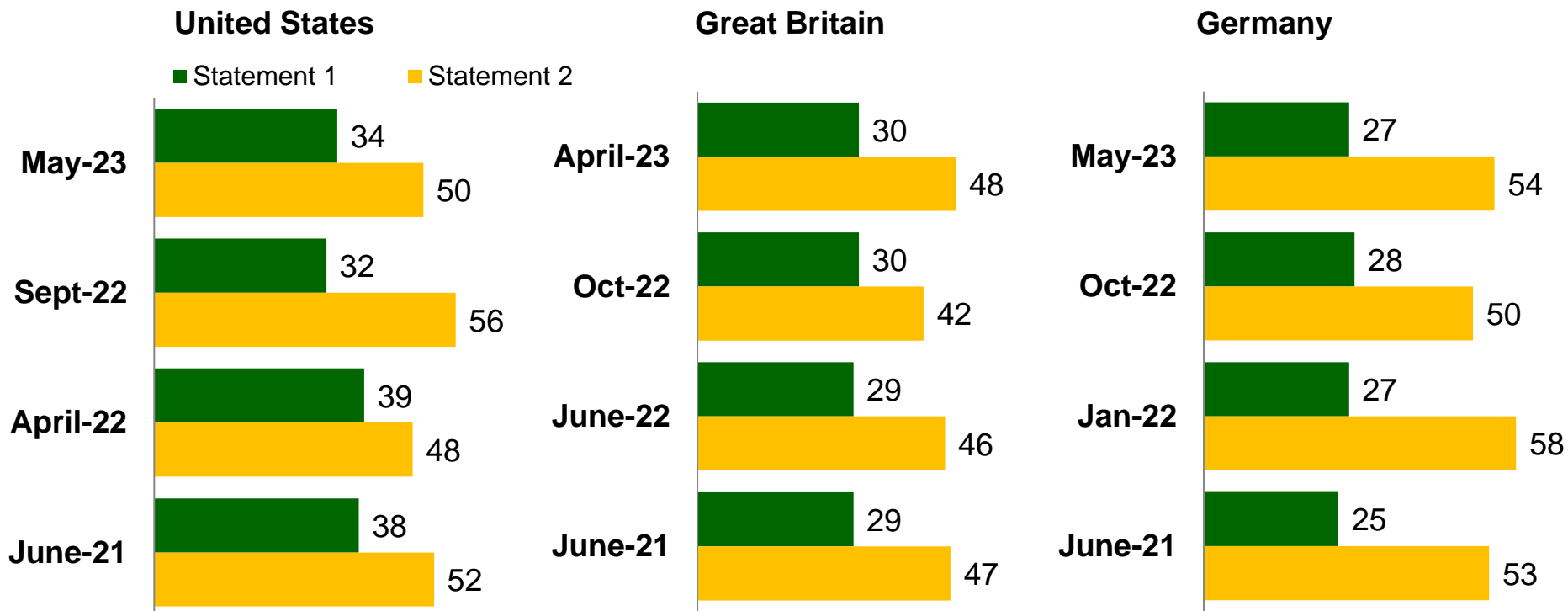
Which of these industries would you MOST want the government to support and champion? Please choose two.



# Across the three countries, only a third support a tax on burning coal, using oil and natural gas as fair

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



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=2000/country/year;  
Asked to 1/2 sample splits

A blurred background image of an audience clapping in a conference room. The focus is on the hands and forearms of several people in the foreground, all of whom appear to be clapping. The background is out of focus, showing more people and what looks like a window or bright light source. The overall tone is professional and positive.

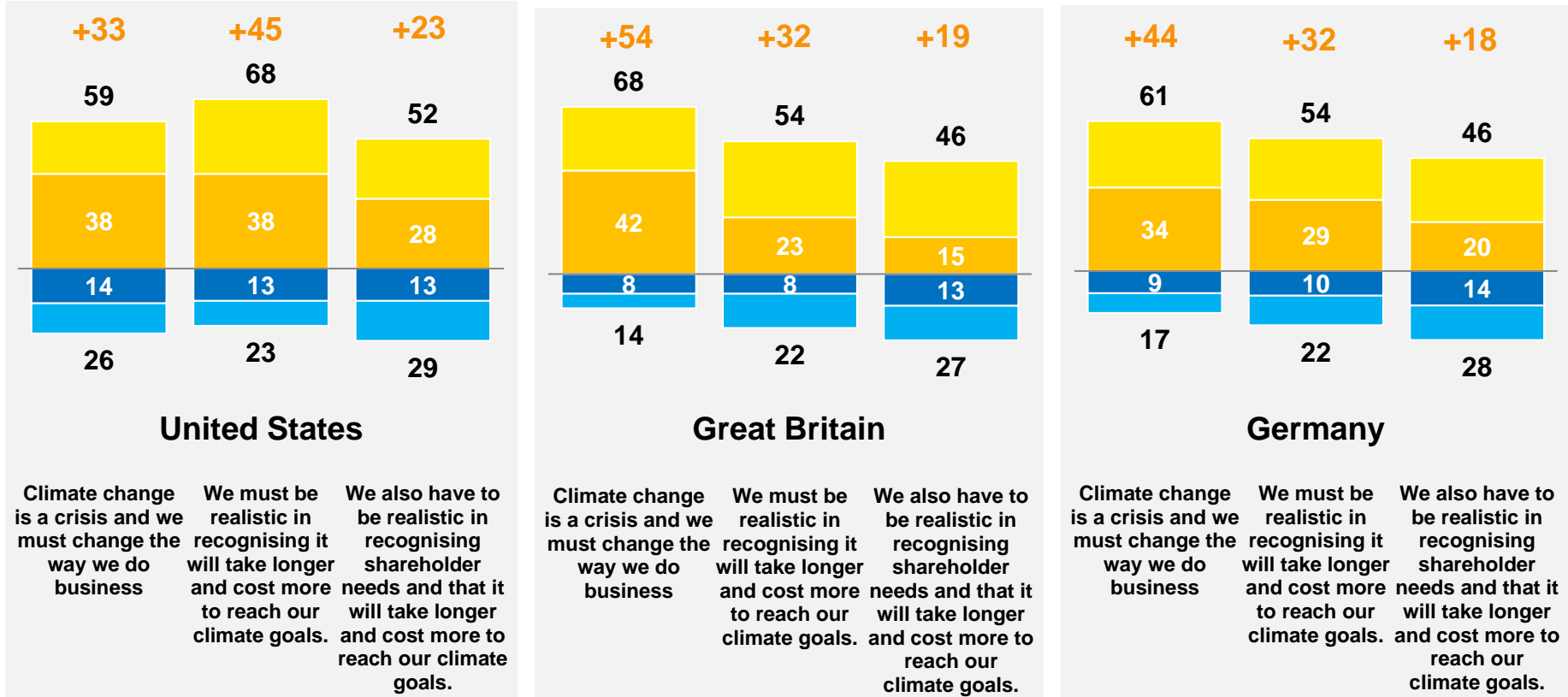
**What if policy changes**

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# US, UK and German employees react very favourably to their employer saying climate change a crisis. US employees more favorable when hear will be realistic, but UK and German employees much less. All crash when told shareholder needs considered.

Feelings toward companies and employer, by country

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



Imagine your employer said the following. Please rate your feelings toward your employer if they said the following, with 100 meaning a very warm FAVORABLE feeling; 0 meaning a very cold, UNFAVORABLE feeling; and 50 meaning not particularly warm or cold.

Total sample, n=2,000/country – each shown to ½ split sample

# Tax policy

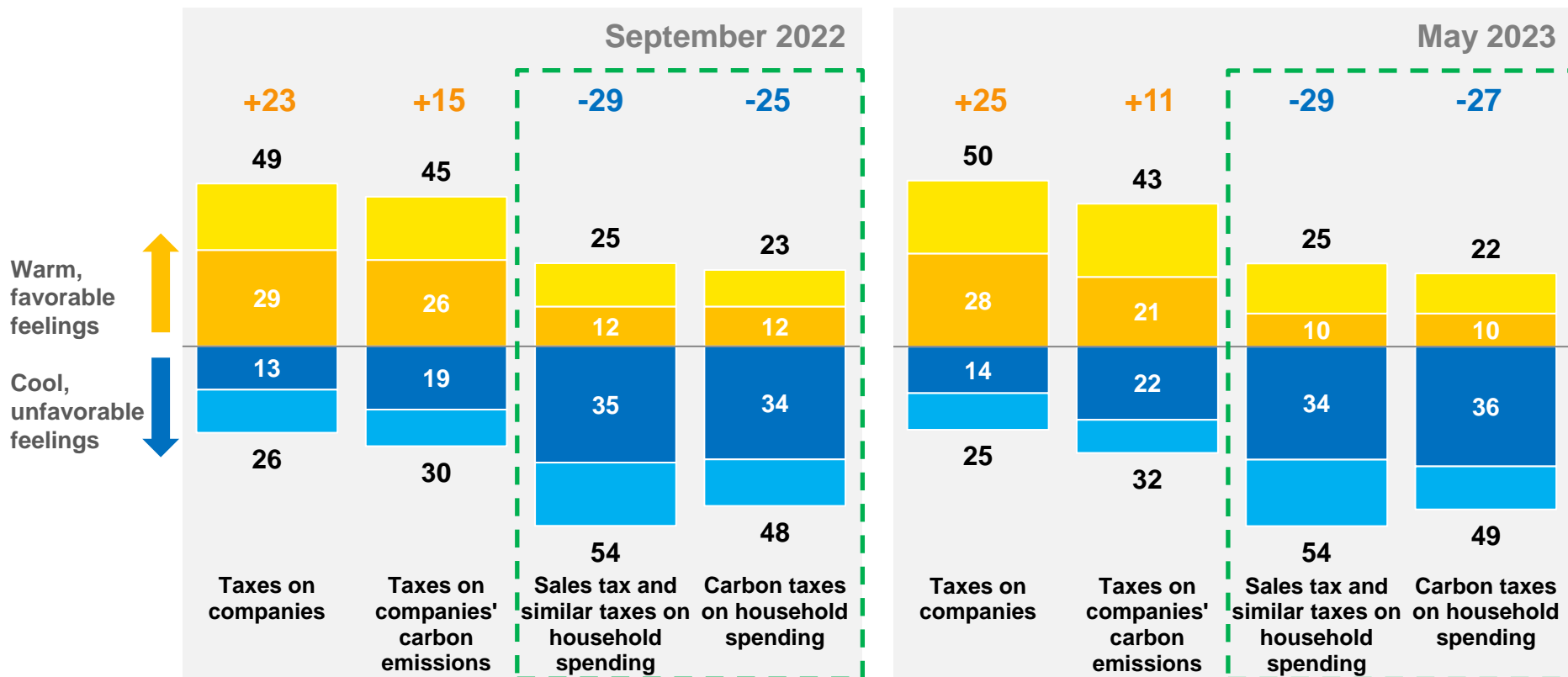
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# In the US, continued opposition to taxes imposed on individuals; high support for taxes on corporations

## Feelings toward taxes, United States

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

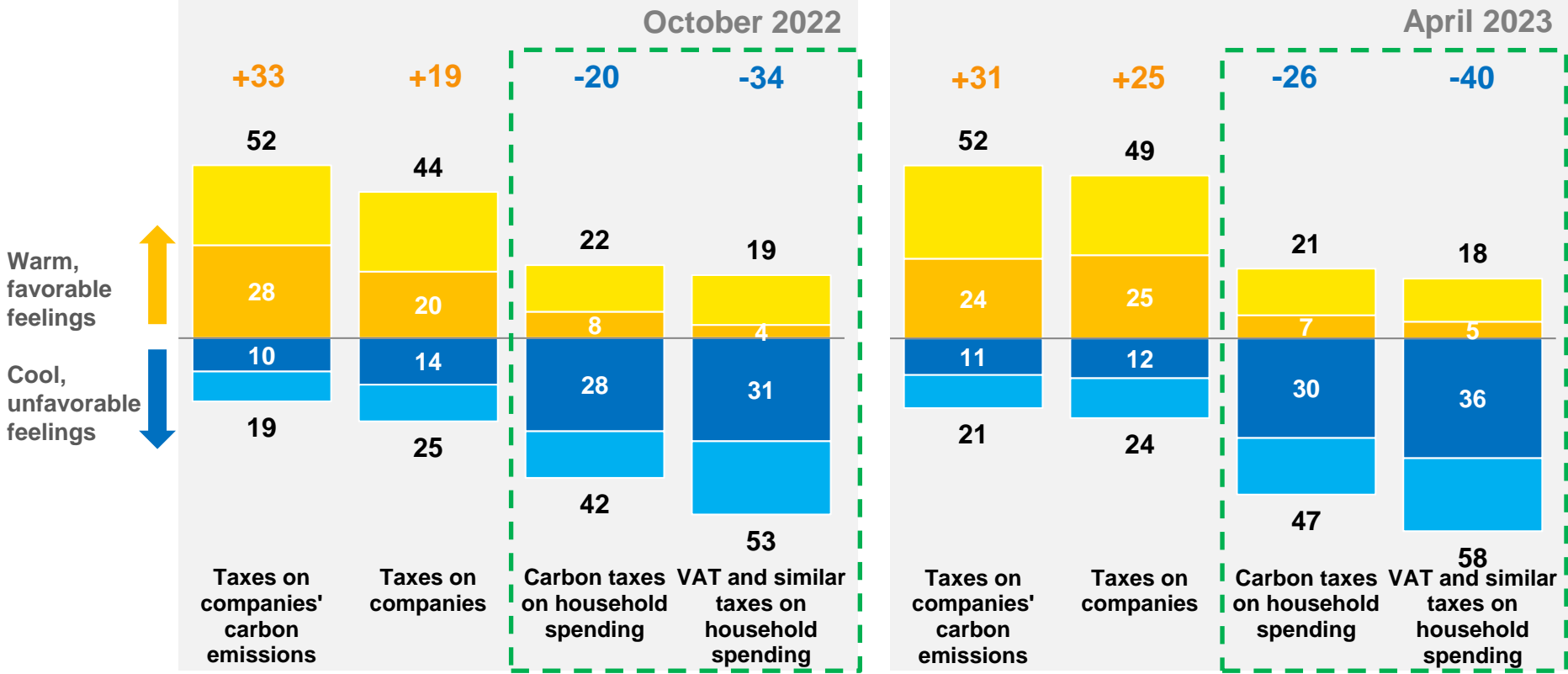


Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.

# In Britain, antipathy towards taxes on individuals has grown since October, while support for taxing companies has grown

## Feelings toward taxes, Great Britain

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

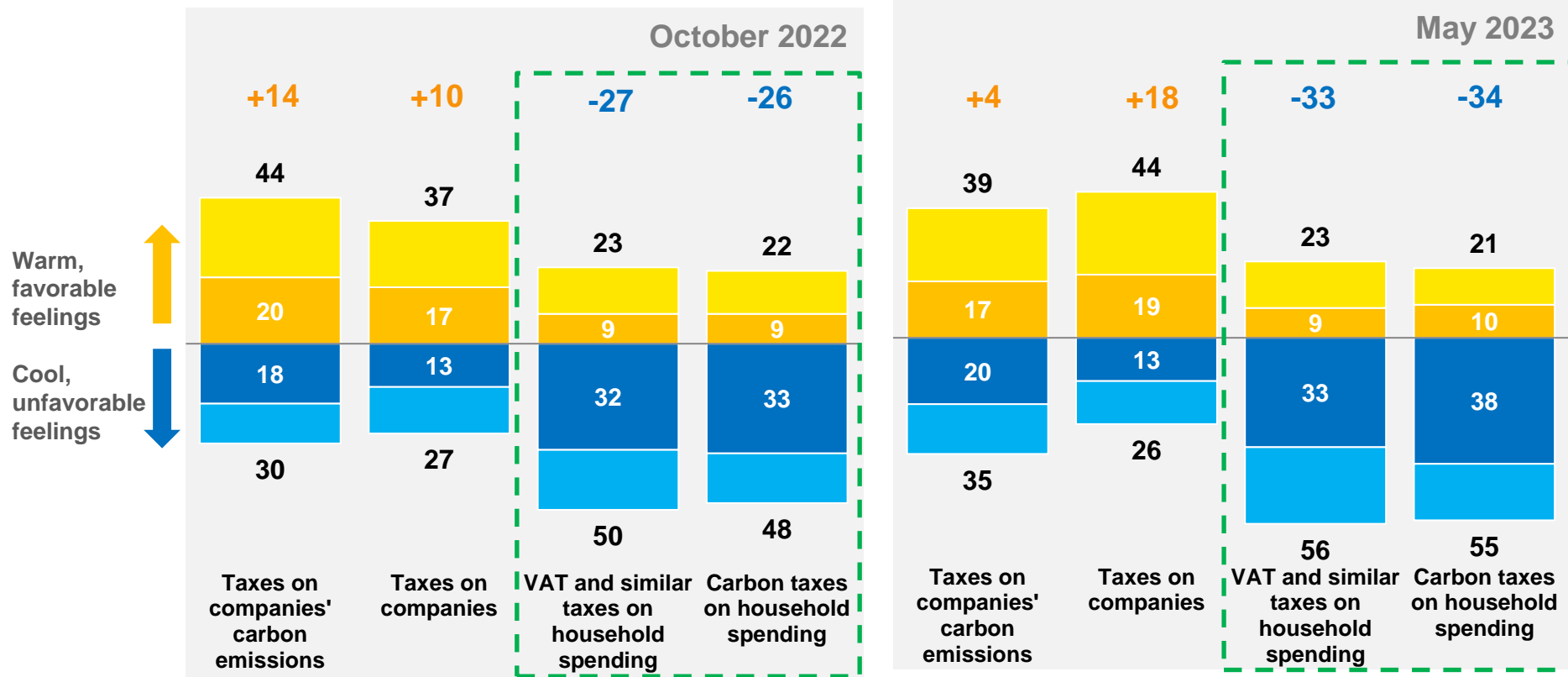


Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.

# In Germany, big jump in support for tax on companies but dropped on taxing carbon emissions; and big jump in “very cool” responses to household taxes, but especially on carbon emissions

## Feelings toward taxes, Germany

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

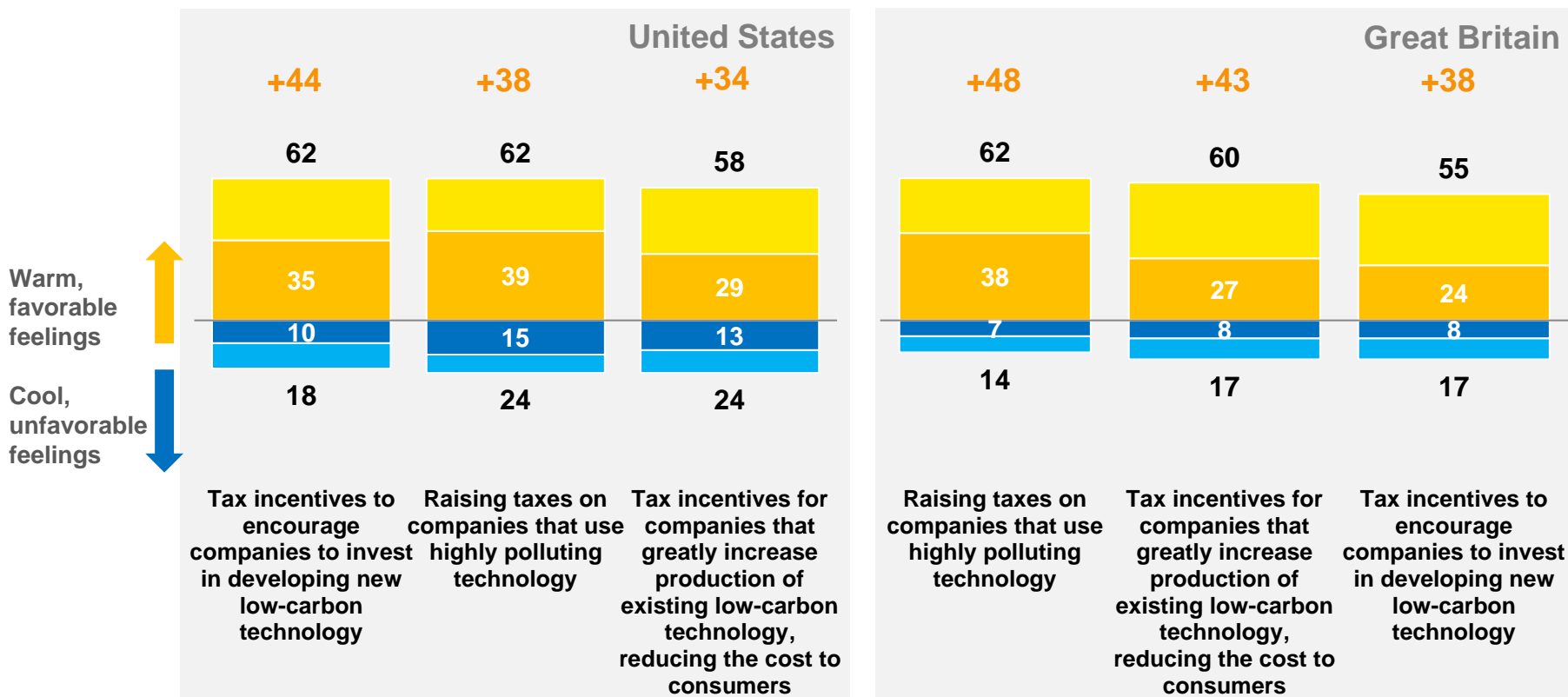


Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.

# US and UK both favorable towards raising taxes and giving tax incentives to lower carbon emissions

## Feelings toward company taxes, by country

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



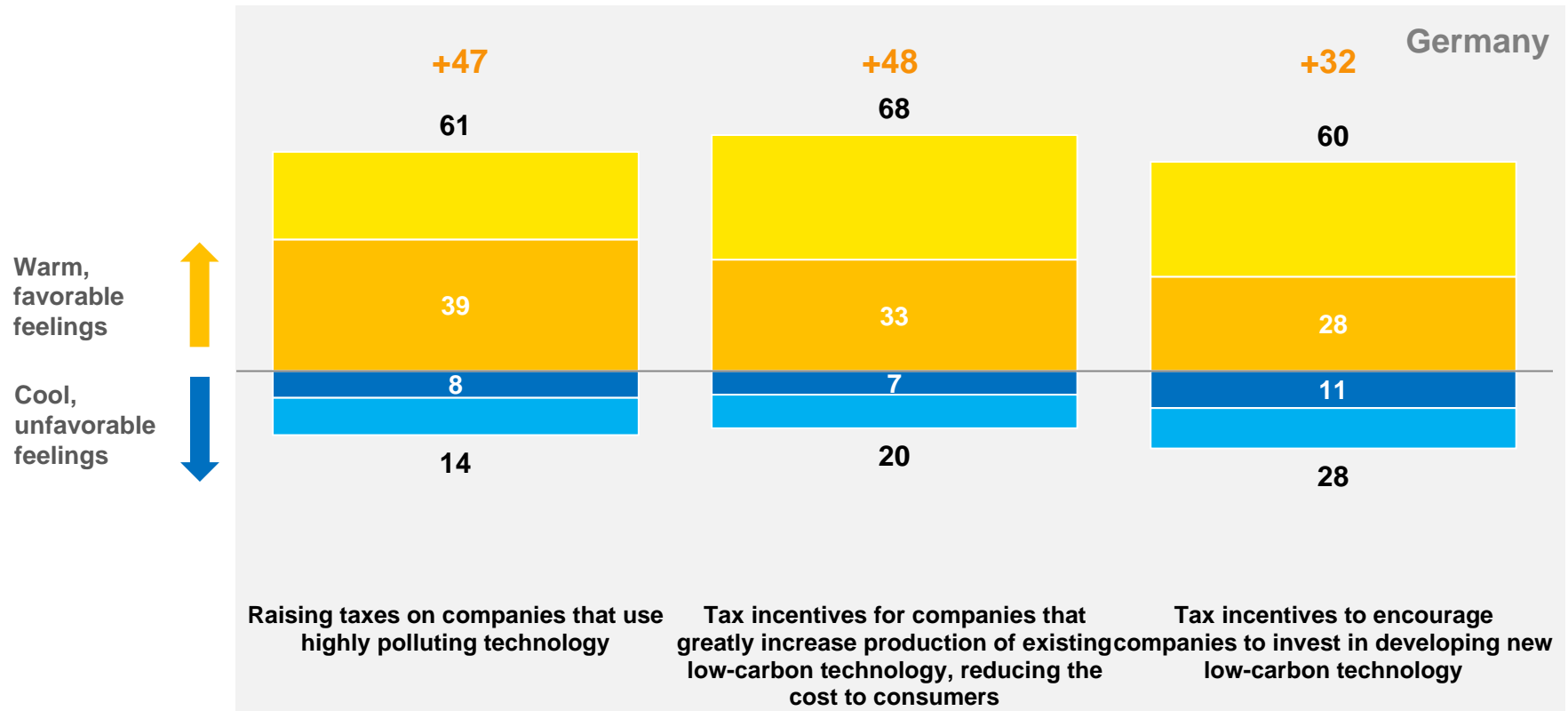
Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.



# Germany also very favorable towards efforts to reduce carbon emissions through tax policy

Feelings toward company taxes, by country

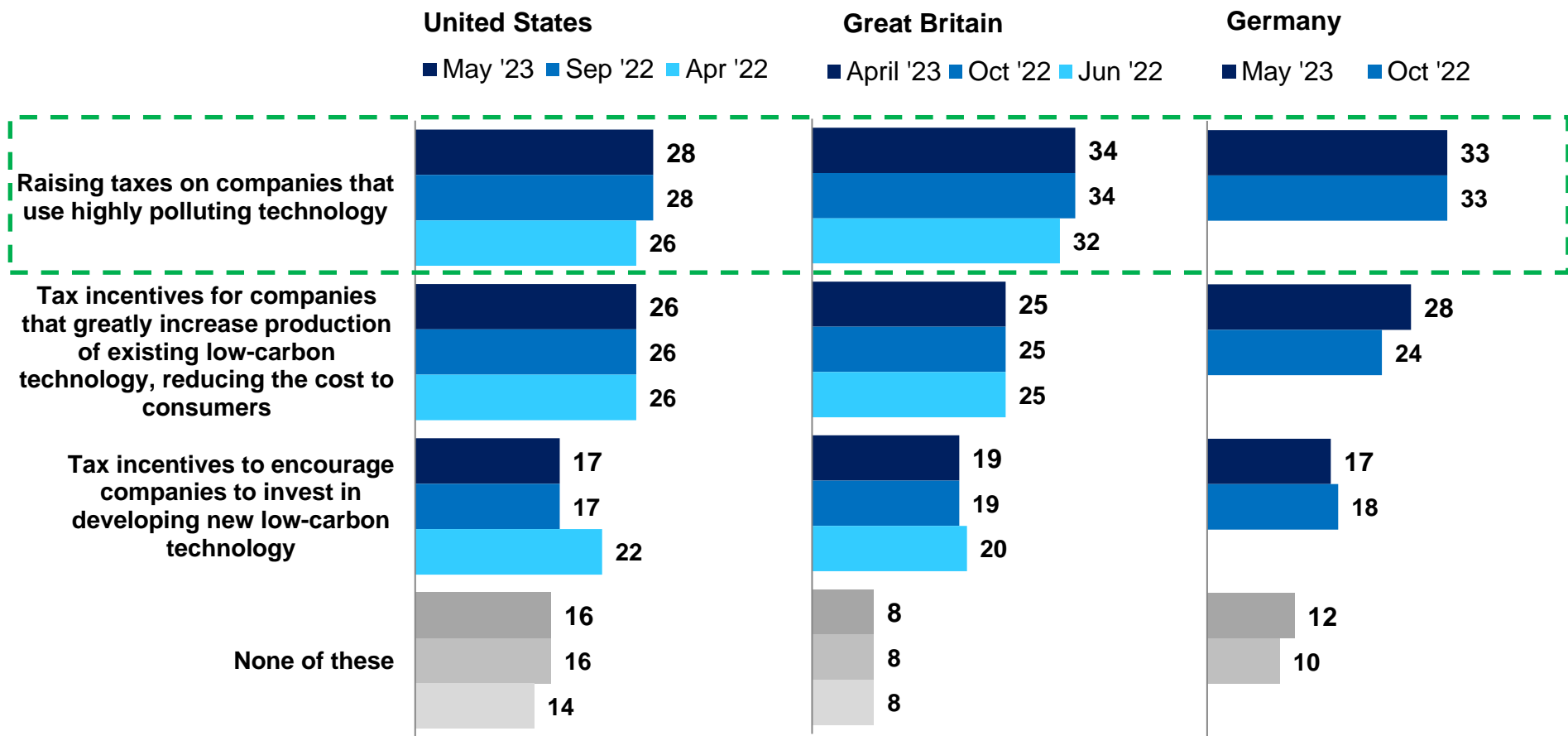
- Cool (26-49)
- Very cool (0-25)
- Warm (51-74)
- Very warm (75-100)



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.

# Strongest support across countries for raising taxes on those with highly polluting technology and tax incentives for those deploy low carbon technology that reduces costs. Will that be impacted by the use of tax credits in some countries?

Preference for potential tax schemes, by country



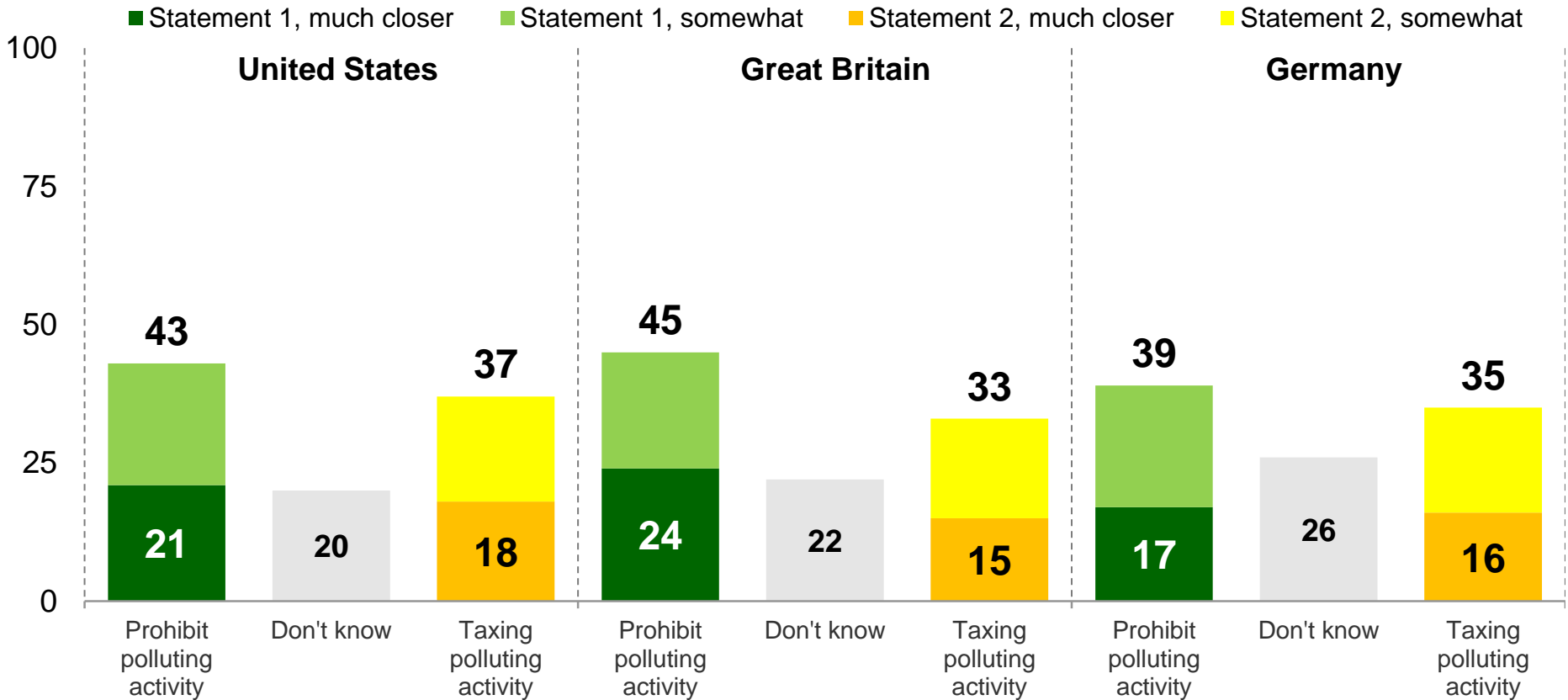
Which ONE of the following are you MOST in favor of?

Total sample, n=2,000

# US, UK, and Germany all slightly favor prohibiting polluting activity as opposed to taxing

1) Governments should reduce greenhouse gas emissions by prohibiting polluting activity.

2) Governments should reduce greenhouse gas emissions by taxing polluting activity.



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=2000/country; asked to 1/2 samples

# Carbon trading

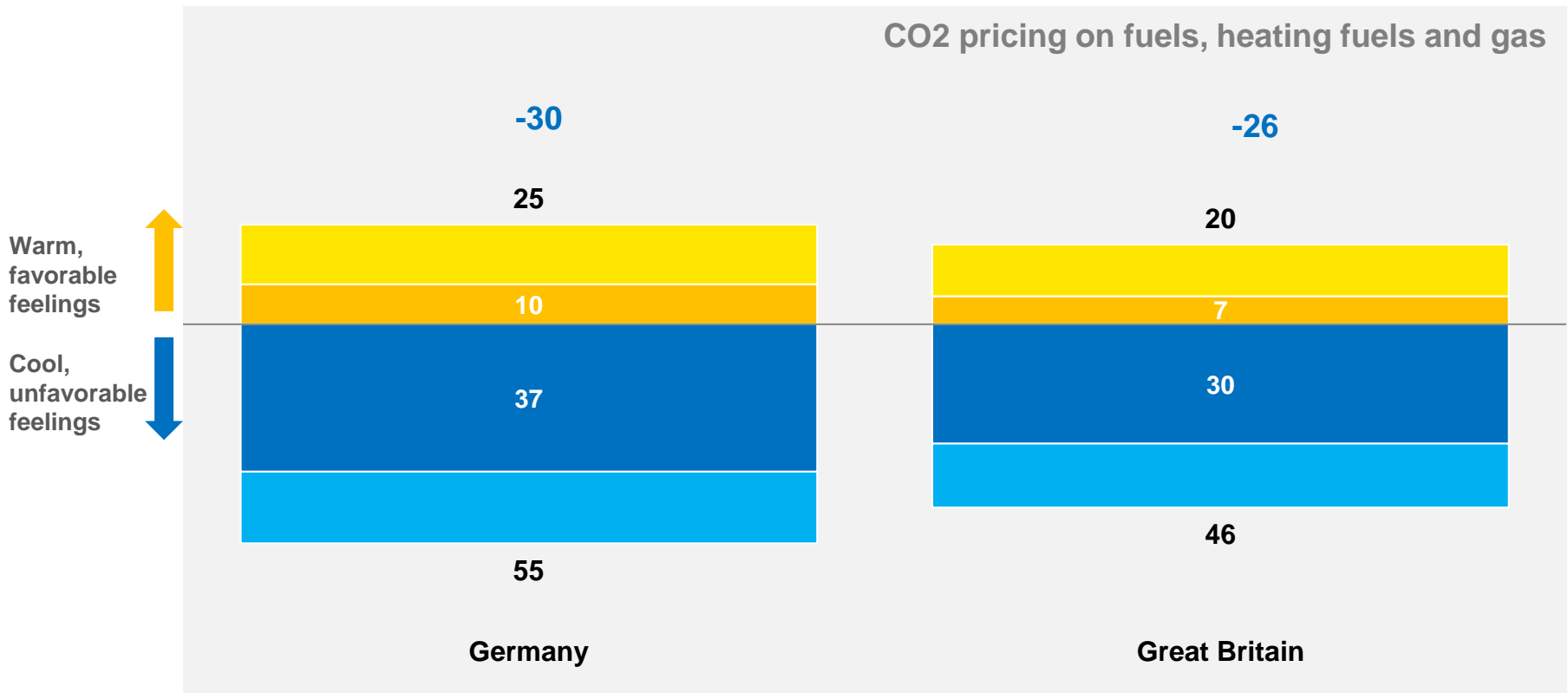
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# Germany and UK both very negative towards CO2 pricing, particularly in Germany

Feelings toward carbon pricing, by country

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



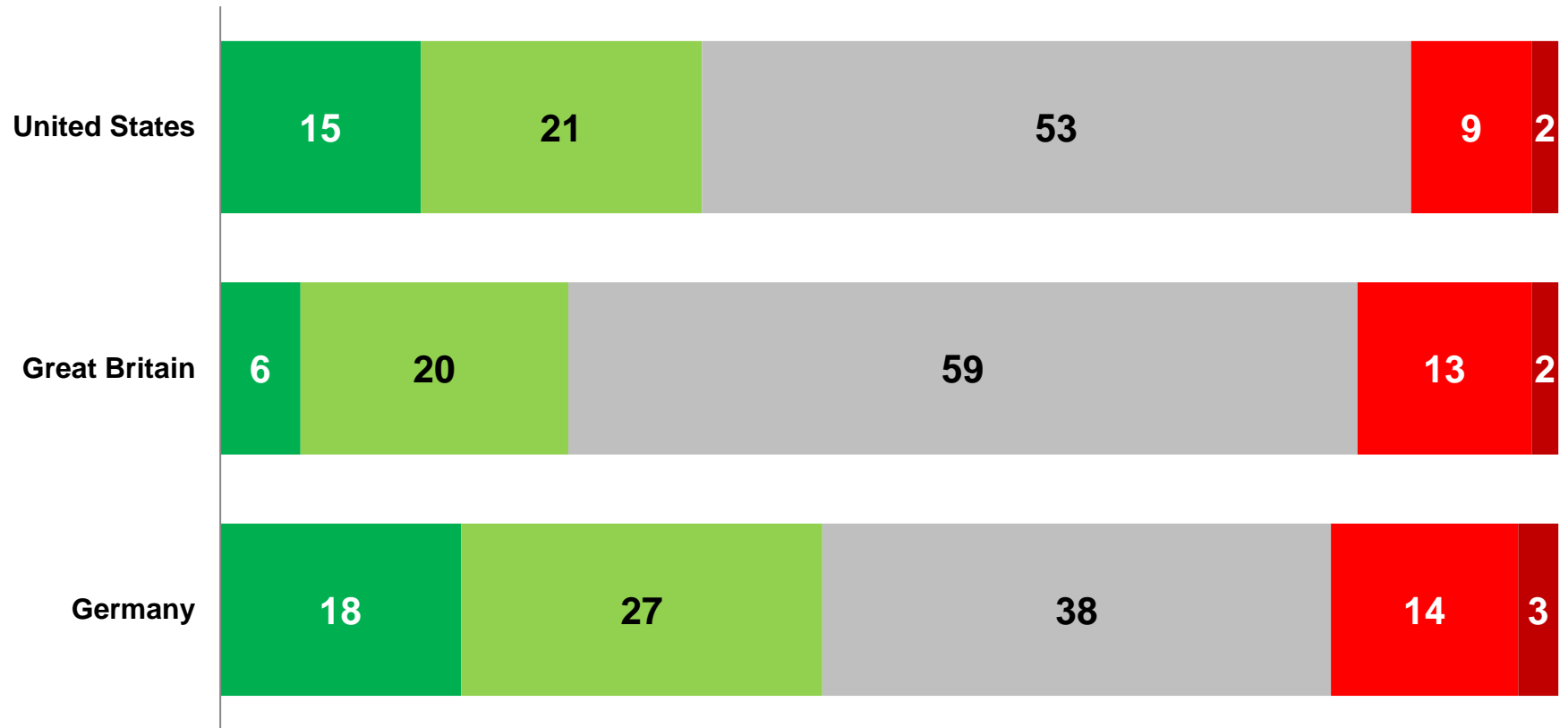
Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVORABLE feeling; zero meaning a VERY COLD, UNFAVORABLE feeling; and fifty meaning not particularly warm or cold.

Total, n=2,000/country

# Germany most aware of carbon trading schemes, UK least aware with high shares of not sure in all three countries

Knowledge of country carbon trading scheme, by country

■ Yes, definitely ■ Yes, probably ■ Not sure ■ No, probably ■ No, definitely not



*To the best of your knowledge, does [COUNTRY] have a carbon trading scheme in which companies can buy and sell rights to carbon emissions?*

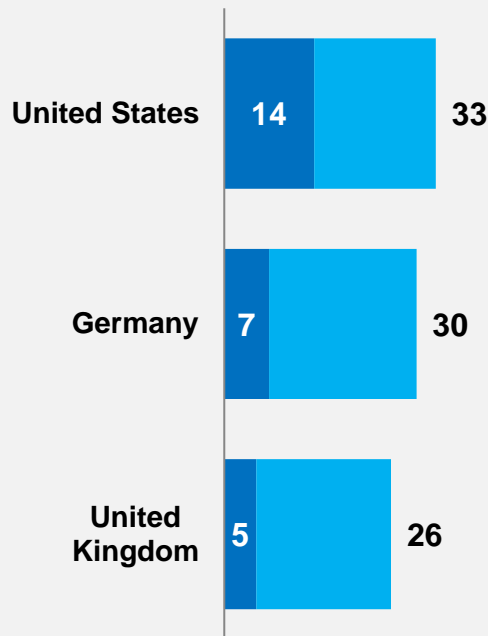
*Total, n=2,000/country*

# More information increases approval in US, UK and Germany

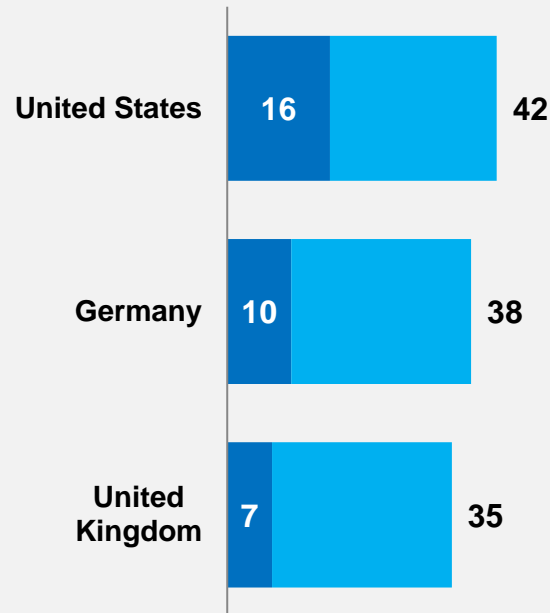
## Understanding carbon credits, by country

Companies may pay for carbon credits to offset the carbon emissions they produce

- Strongly approve
- Somewhat approve



Companies can try to cancel out their greenhouse gas emissions by buying 'carbon credits'. These credits pay for activities that reduce future emissions, for example by planting trees or accelerating the switch to clean energy in developing countries. The idea is that, by eliminating carbon emissions elsewhere, companies can balance out emissions they cause.



*Do you approve or disapprove of the system of carbon credits?*

**Total, n=2,000/country; Asked to ½-sample splits**

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**June 2023**

