

CLIMATE
Policy & Strategy

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



What this is based on

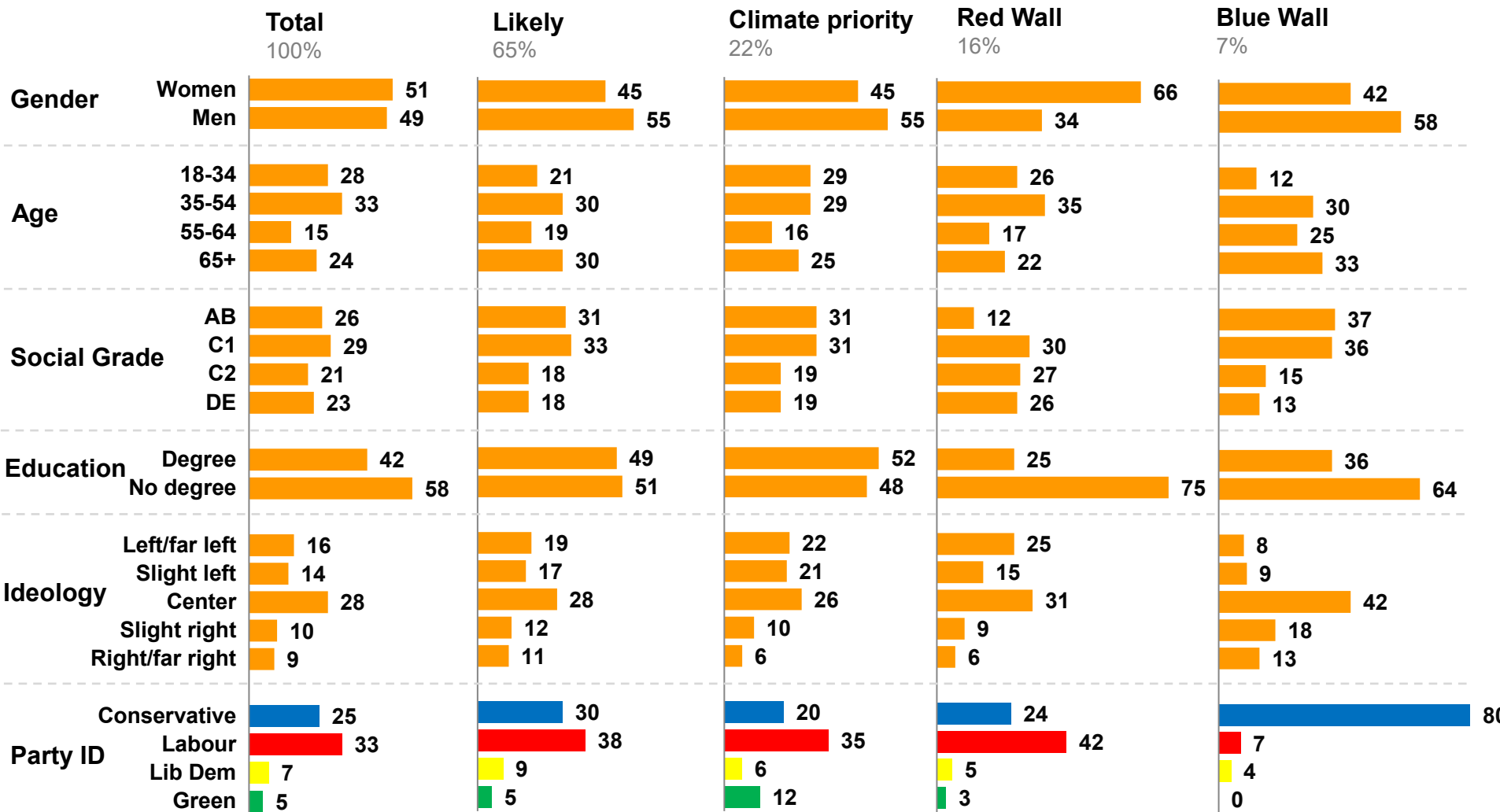
Our poll

- N=1,000 nationally representative survey of Great Britain
- Fieldwork: 17-22 November, 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
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
Blue Wall	Voted Conservative in the 2019 General Election, voted Remain in the EU Referendum
Red Wall	Lives in the Midlands or North of England, in a town or rural area, and identifies as working class

Political targets:



What you need to know (1/2)

- The cost of living, inflation and energy prices – along with the NHS – are still the top problems. Immigration rises for Conservatives and climate for Liberal Democrats.
- The structure of attitudes creates a daunting set of challenges for the government to raise its standing. Its 30-year narrative of bold changes loses to Labour's 13-years of austerity by a margin greater than the vote. Nobody believes the government's promises of major changes.
- Voters think government delivered a halved inflation-rate, but no other goal, including promised improvements to the NHS, more police and control of boats. Which leads to all the leaders in the government getting ratings below the Conservative vote.
- Government is weighed down by belief it has left the NHS with 7 million-long waiting list, no part of government works and it's enriching donors.
- In the context of high prices, voters fault global prices, excessive-profit taking and Brexit.
- For Labour, its top vision statements are modernization of the NHS waiting times and policies to create British energy while addressing climate change. Its most popular policies are freezing energy bills paid for with excess profit tax and creating thousands of green jobs and accelerating on-shore power and solar.

What you need to know (2/2)

- Almost two-thirds feel strongly that climate change is a crisis, requiring bold action – and it is worth the cost. And the percent wanting government to take action prevent climate change has risen steadily, particularly in the last six months.
- Big majorities reject the government's position of pursuing all domestic energy sources; instead, speed transition to renewables. That is true in Red Wall.
- A big and growing majority views addressing climate as an opportunity for Britain to grow the economy and show global leadership.
- Voters believe the UK's industrial policy should be focused on the low carbon sector. But a rising number also think oil and gas requires some attention. And a majority want to expand exploration of the North Sea to address high energy prices.
- Russia anchors new strategic space for British voters. That means strong support for aiding Ukraine. Support has grown.
- But voters are more negative on helping Israel. Israel is viewed more negatively than Palestinians. But there is cross-party support for policies that Israel end Hamas' role.

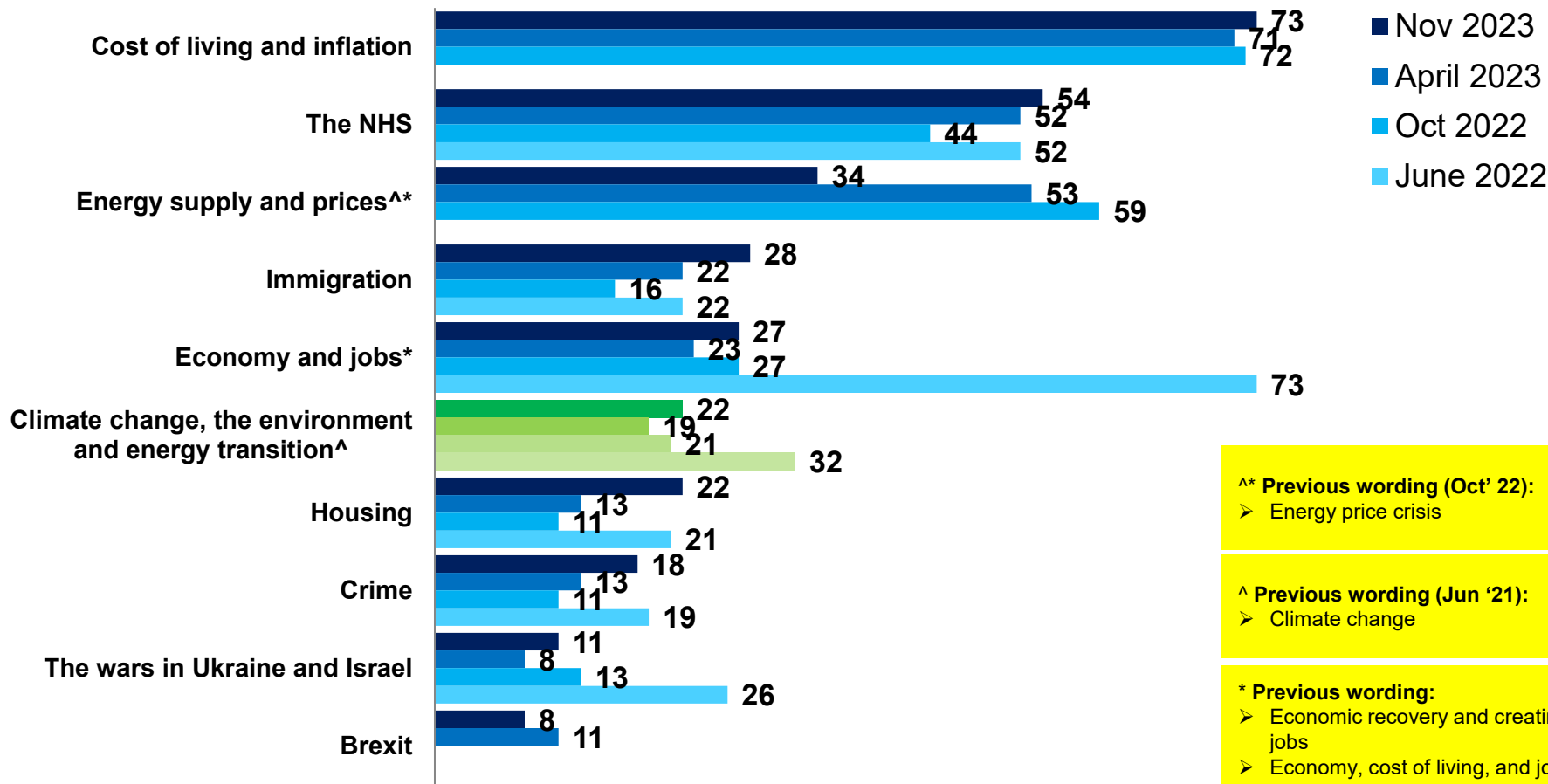


Context



Cost of living and inflation, plus NHS top priorities; energy supply/price still high; immigration up; climate stable at one in five

Priorities for government, total sample

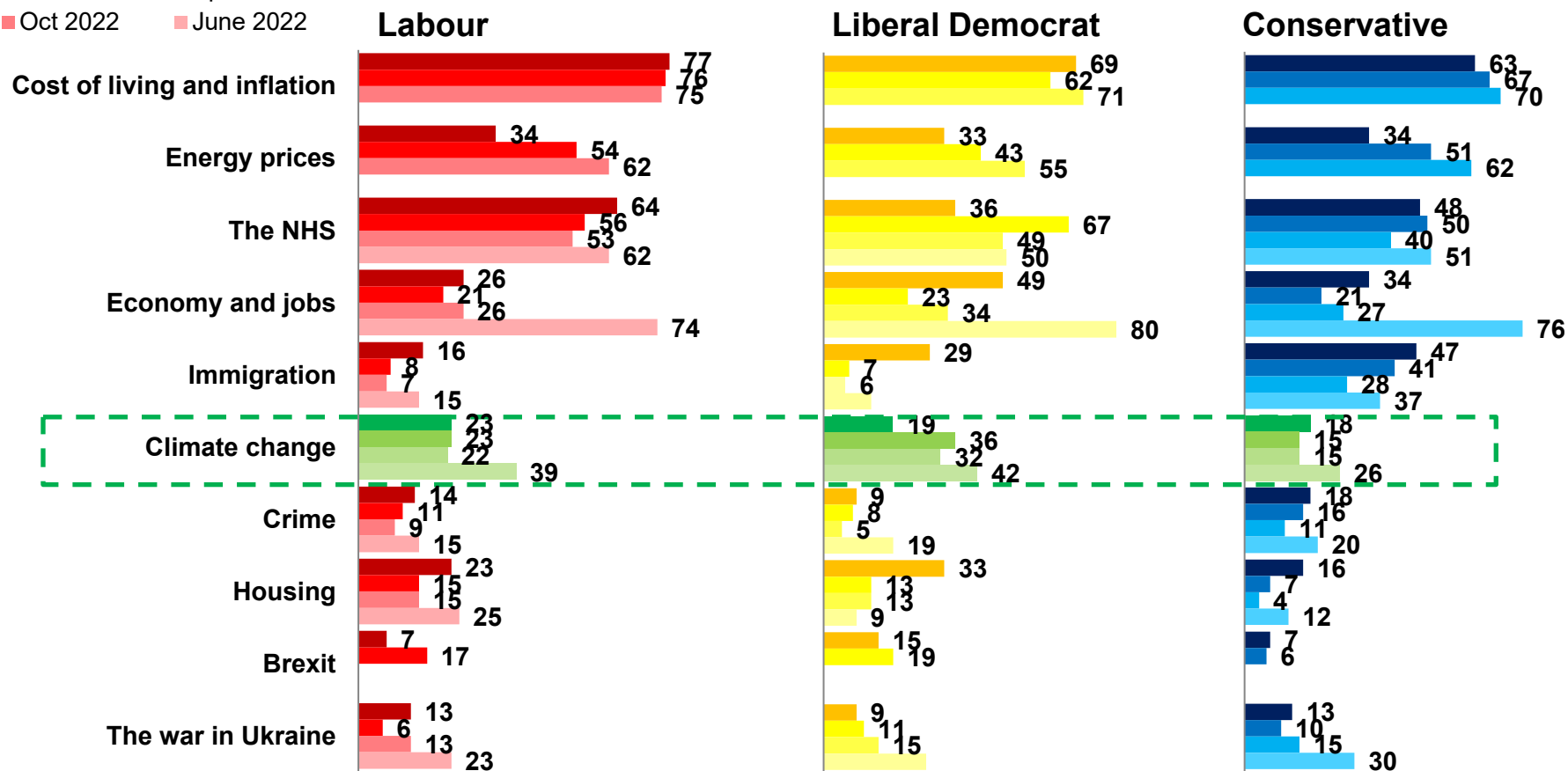


What are the *THREE* issues you think should be the top priorities for government?

For Labour top issues are costs, inflation & energy prices; with NHS near top; for Tories, costs, NHS & immigration; for Lib Dems, NHS, cost of living and climate up to 36%

Priorities for government, by past vote

■ Nov. 2023 ■ April 2023
 ■ Oct 2022 ■ June 2022

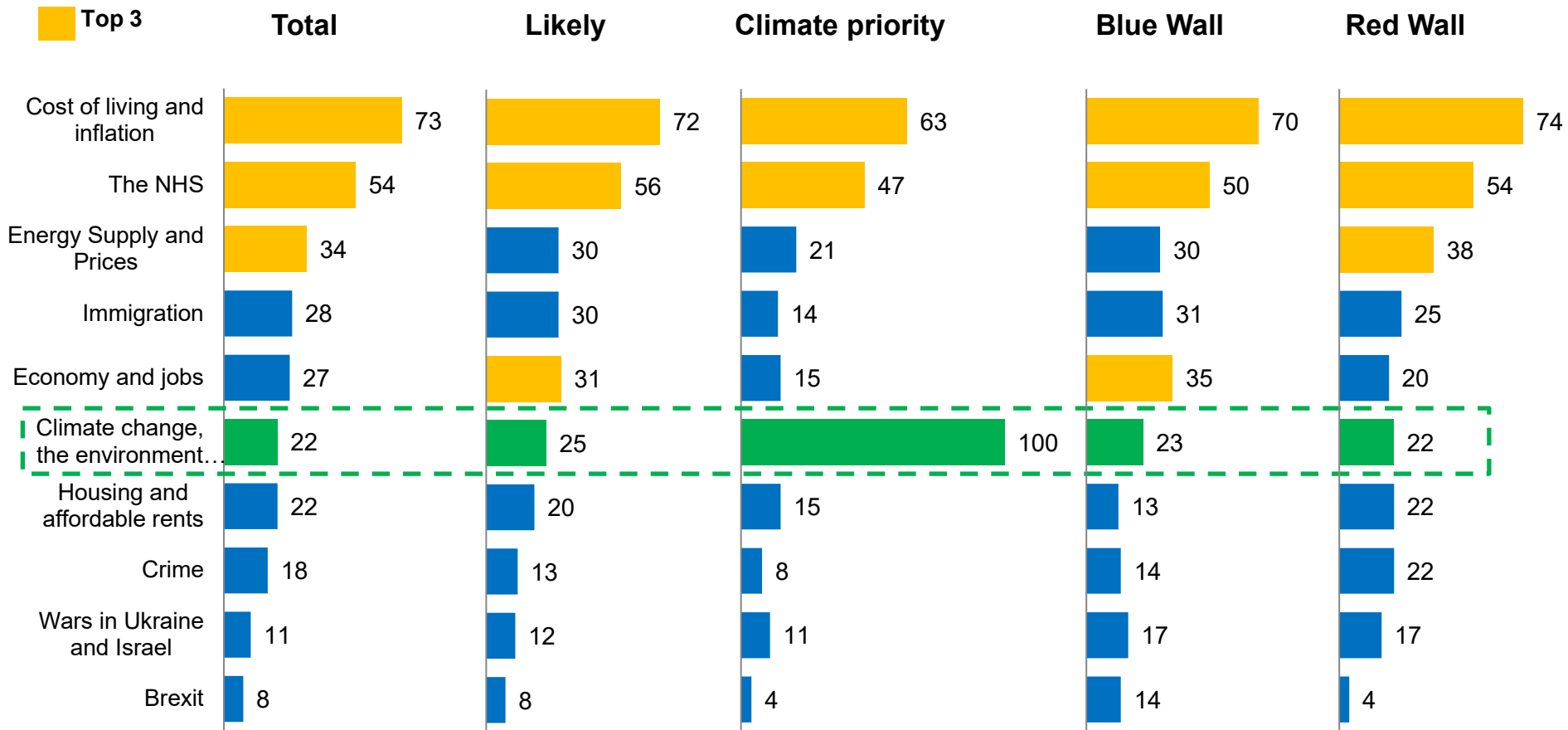


What are the *THREE* issues you think should be the top priorities for government?

Party Identification: Labour, n=330; Liberal Democrat, n=70; Conservative, n=250

Among targets, cost of living and inflation, the NHS, joined by energy supply & price, particularly in Red Wall

Priorities for government, by target



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

Total, n=1,000; Likely, n=654; Climate Priority, n=217; Blue Wall, n=66; Red Wall, n=155

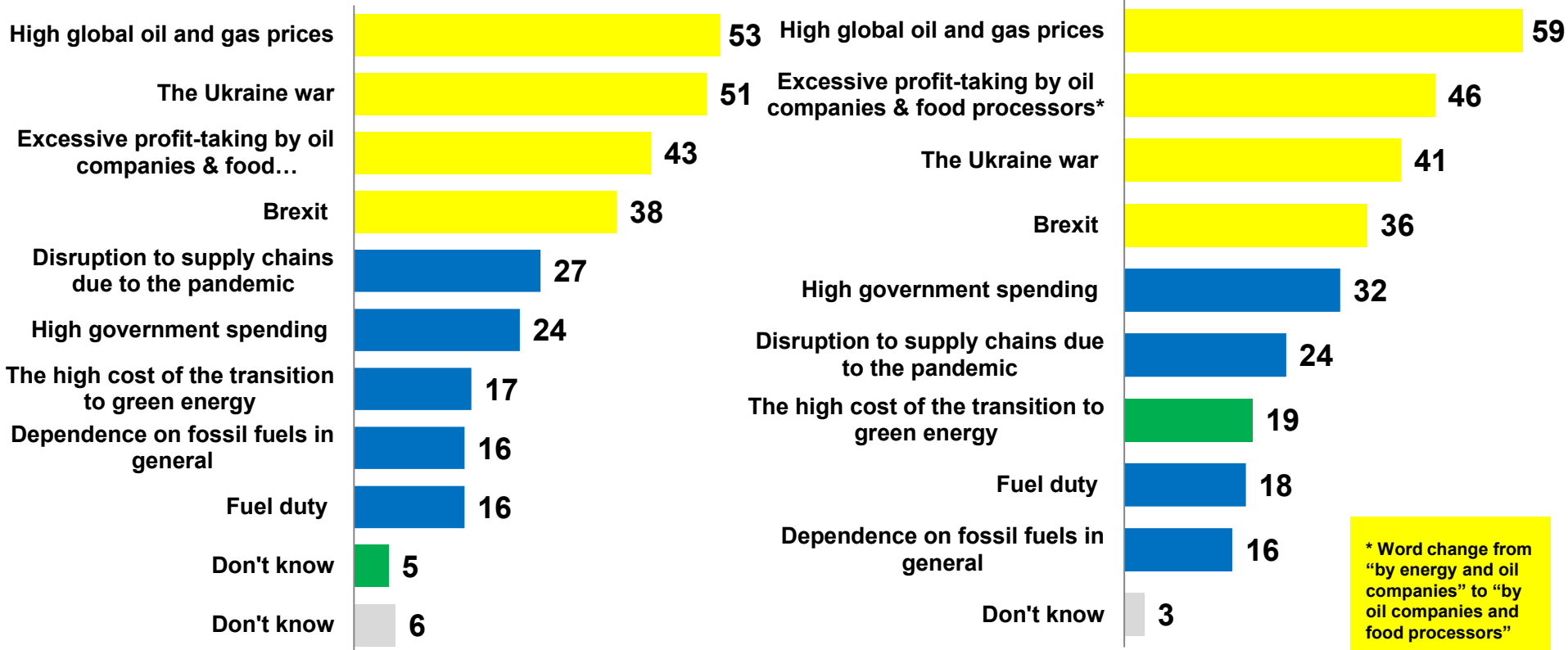
High global prices remains top reason for higher costs. Excessive profits & Brexit part of cause

Reasons for higher costs, over time, total sample

= Top 4

April 2023

November 2023

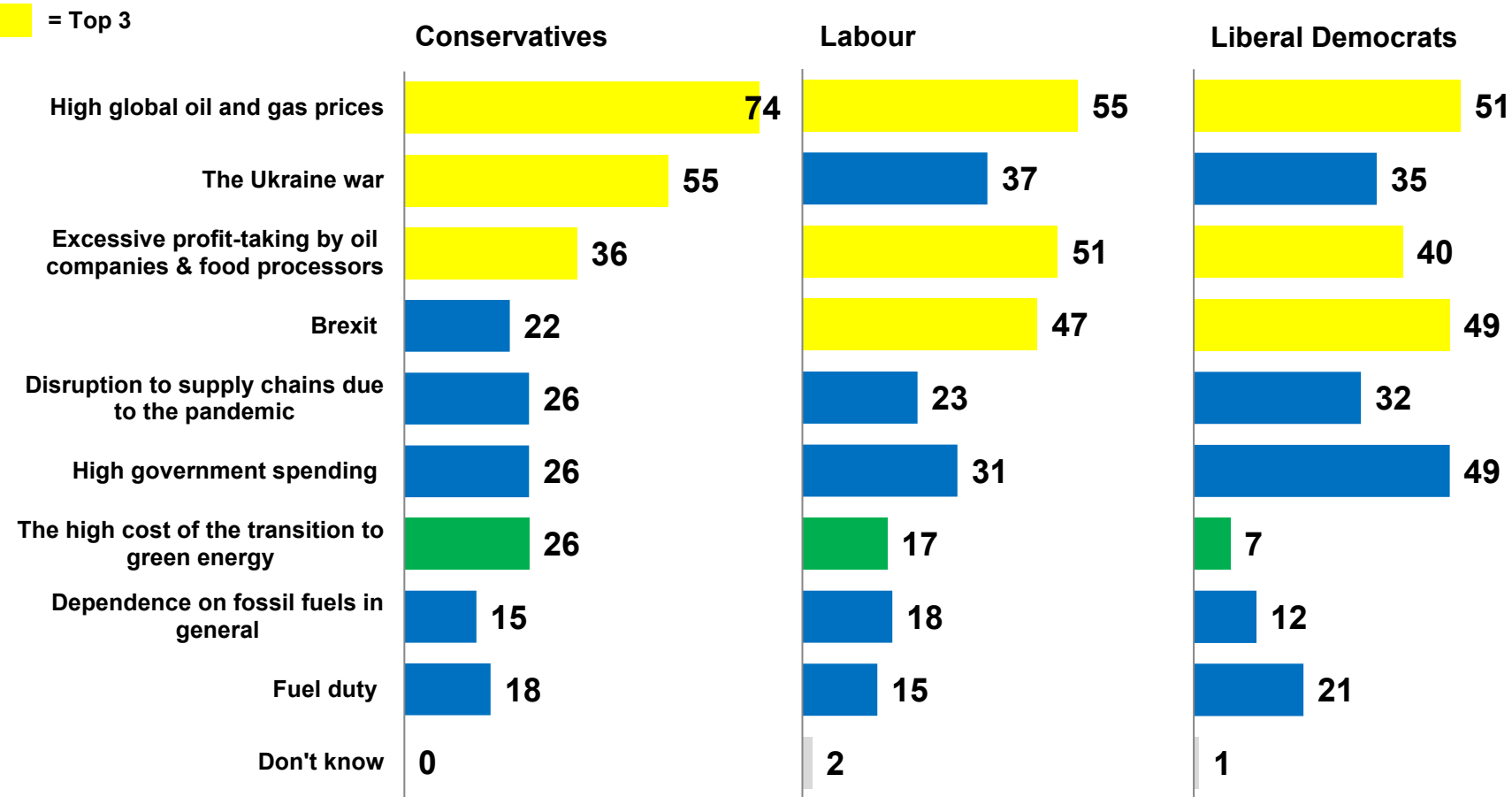


* Word change from "by energy and oil companies" to "by oil companies and food processors"

(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.

All parties blame high oil and gas prices for why prices have risen; Lib Dems and Labour also split between Brexit and excessive profit-taking

Reasons for higher costs, by past vote



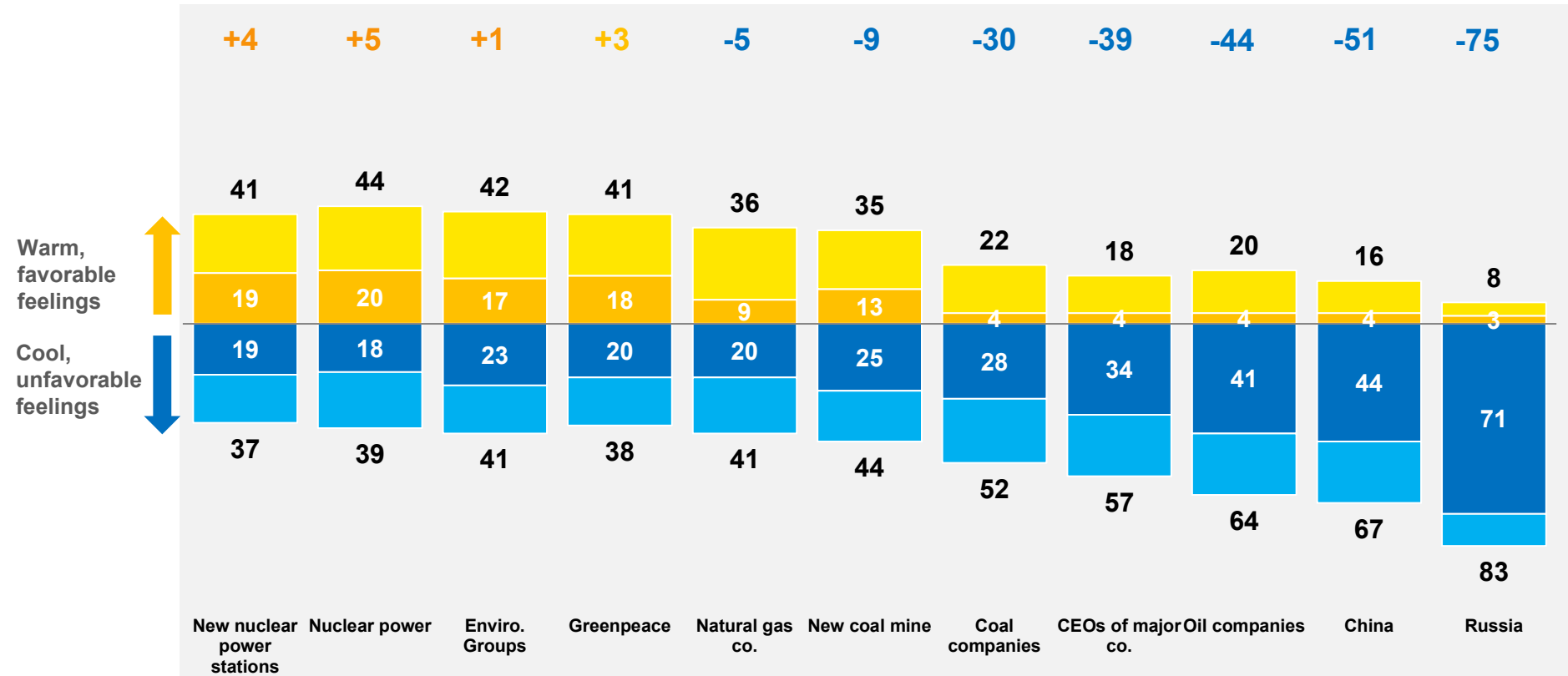
As you know, Britain has faced higher prices for things. Please select the THREE most important reasons those are happening from the list below.

Party Identification: Conservative, n=250; Labour, n=330; Liberal Democrat, n=70

Nuclear power and new nuclear power stations receive favourable ratings, but not new coal; mixed feelings on environmental groups; oil sector in own negative space, though exceeded by China & Russia

Feelings toward companies and environmental actors, Great Britain

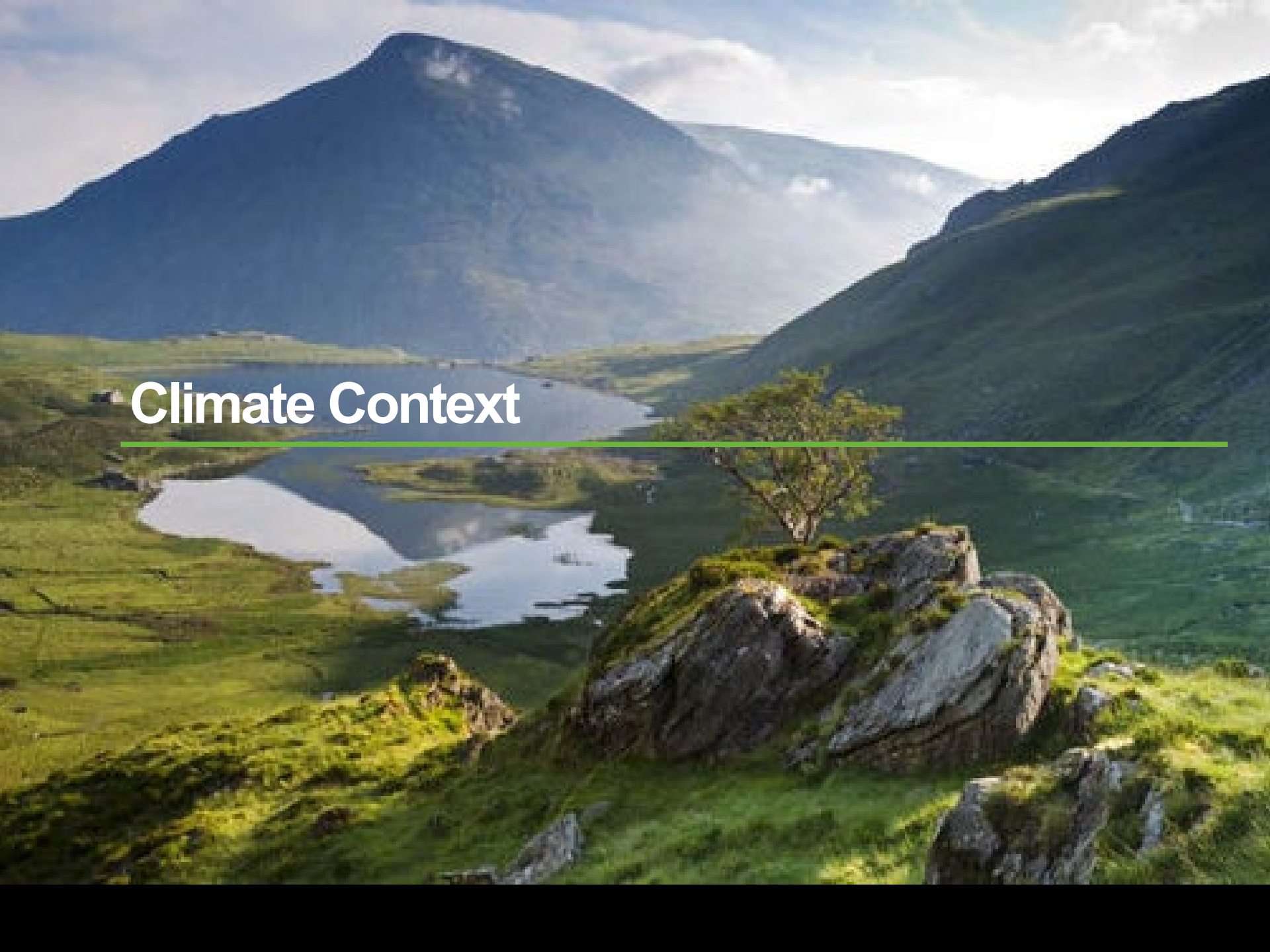
■ Cool (26-49) ■ Warm (51-74)
■ Very cool (0-25) ■ Very warm (75-100)



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=1,000

Climate Context



Stable is the two-thirds who believe climate change a threat needing major and worth the 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) (2022-2023) 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

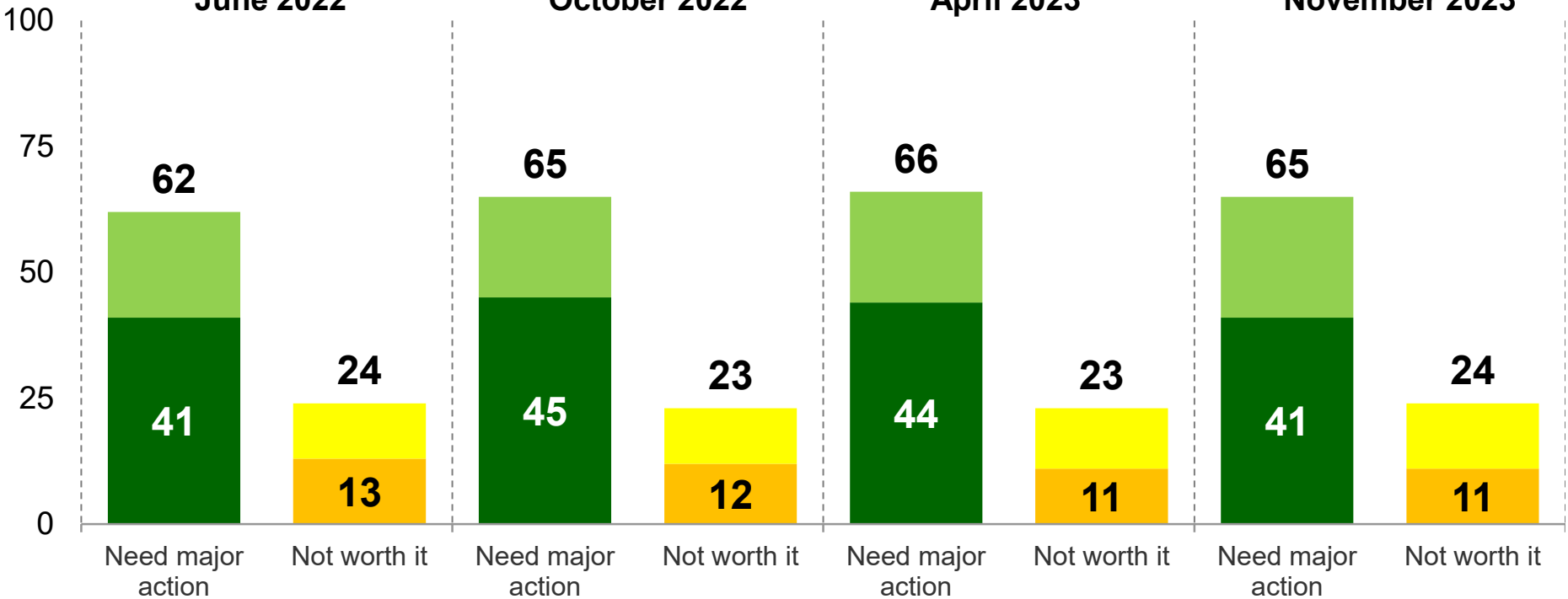
■ Statement 2, somewhat

June 2022

October 2022

April 2023

November 2023



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

This belief much higher with likely voters and Blue Wall, while sustained in Red

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

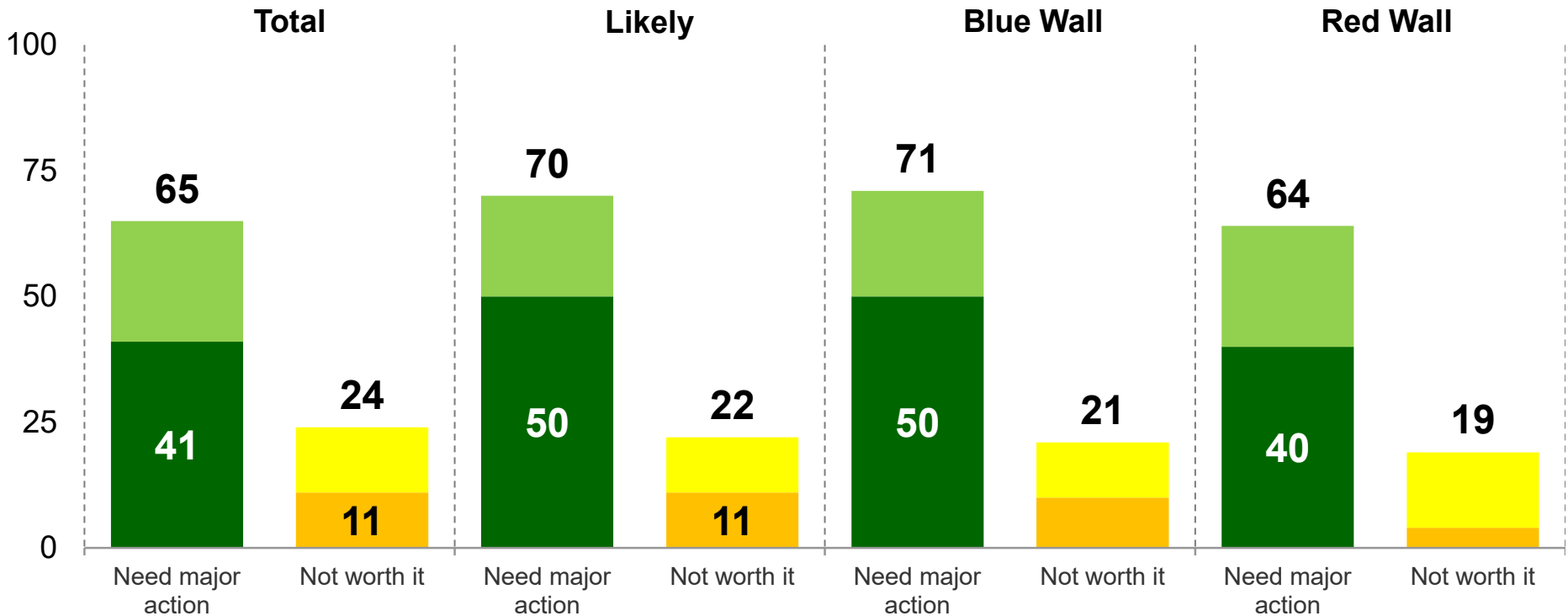
2) The threat of climate change is exaggerated and the high cost of fixing it may not be worth it.

■ Statement 1, much closer

■ Statement 1, somewhat

■ Statement 2, much closer

■ Statement 2, somewhat

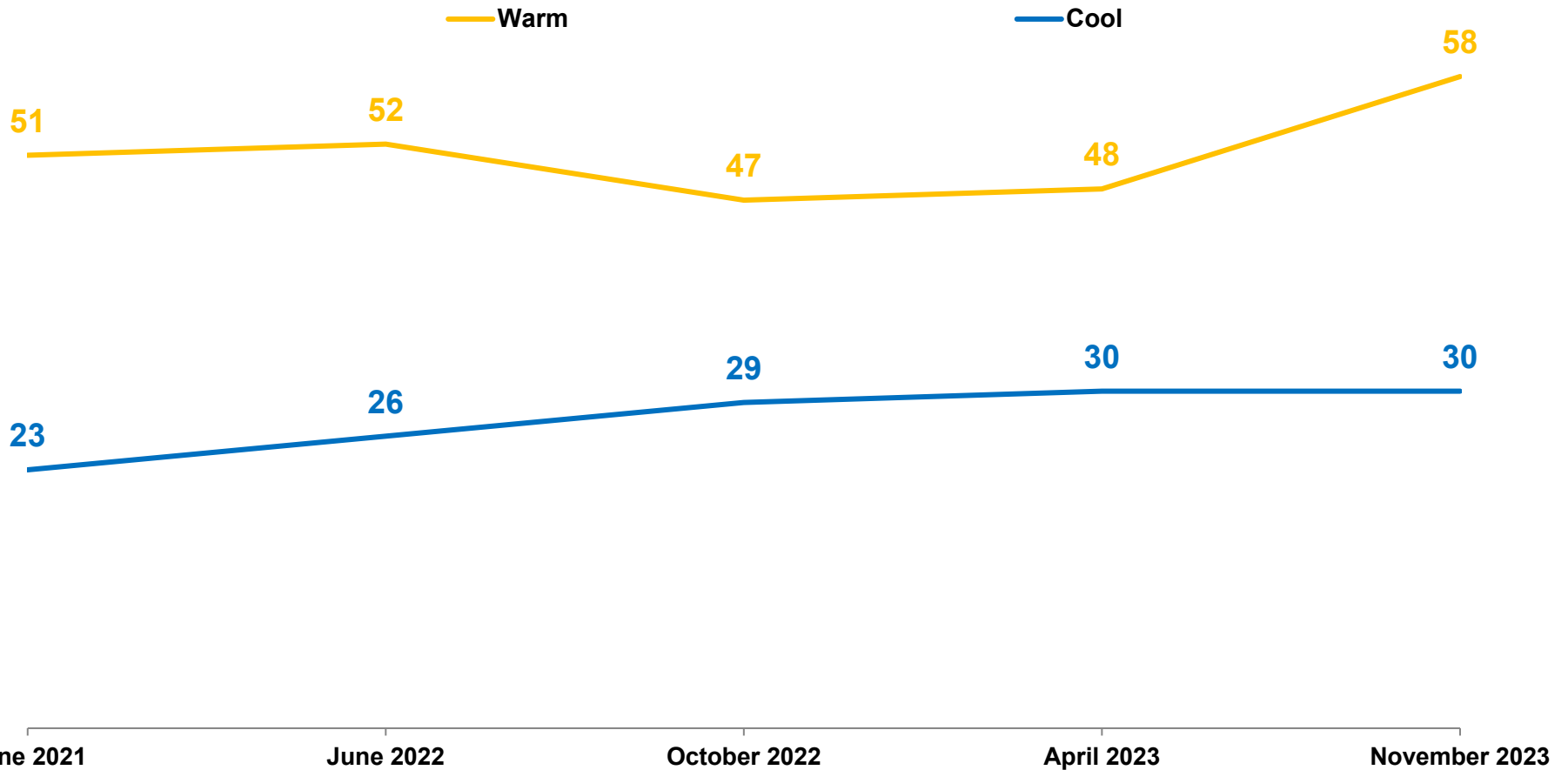


On the following pages are some pairs of statements. For each, please indicate whether the FIRST statement or the SECOND statement comes closer to your views, even if neither is exactly right.

Total, n=1,000; Likely, n=654; Blue Wall, n=66; Red Wall, n=155

Big growth in support for measures to prevent climate change over two years and especially last six months

Feelings toward companies and environmental actors, **Measures to prevent climate change**



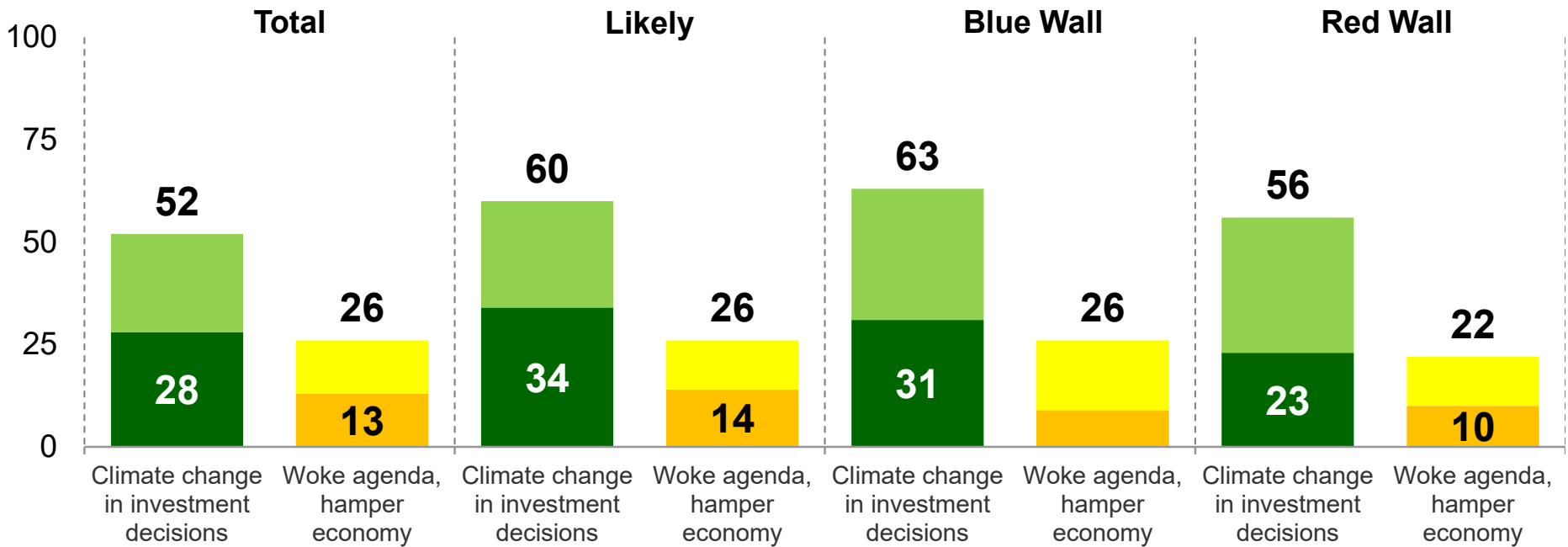
Please rate your feelings toward some people and organisations, with 100 meaning a very warm FAVOURABLE feeling; 0 meaning a very cold, UNFAVOURABLE feeling; and 50 meaning not particularly warm or cold. You can use any number from 0 to 100

Majority in the UK say right for companies to factor in climate change in their investments; it's not “woke” here, including Red Wall

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



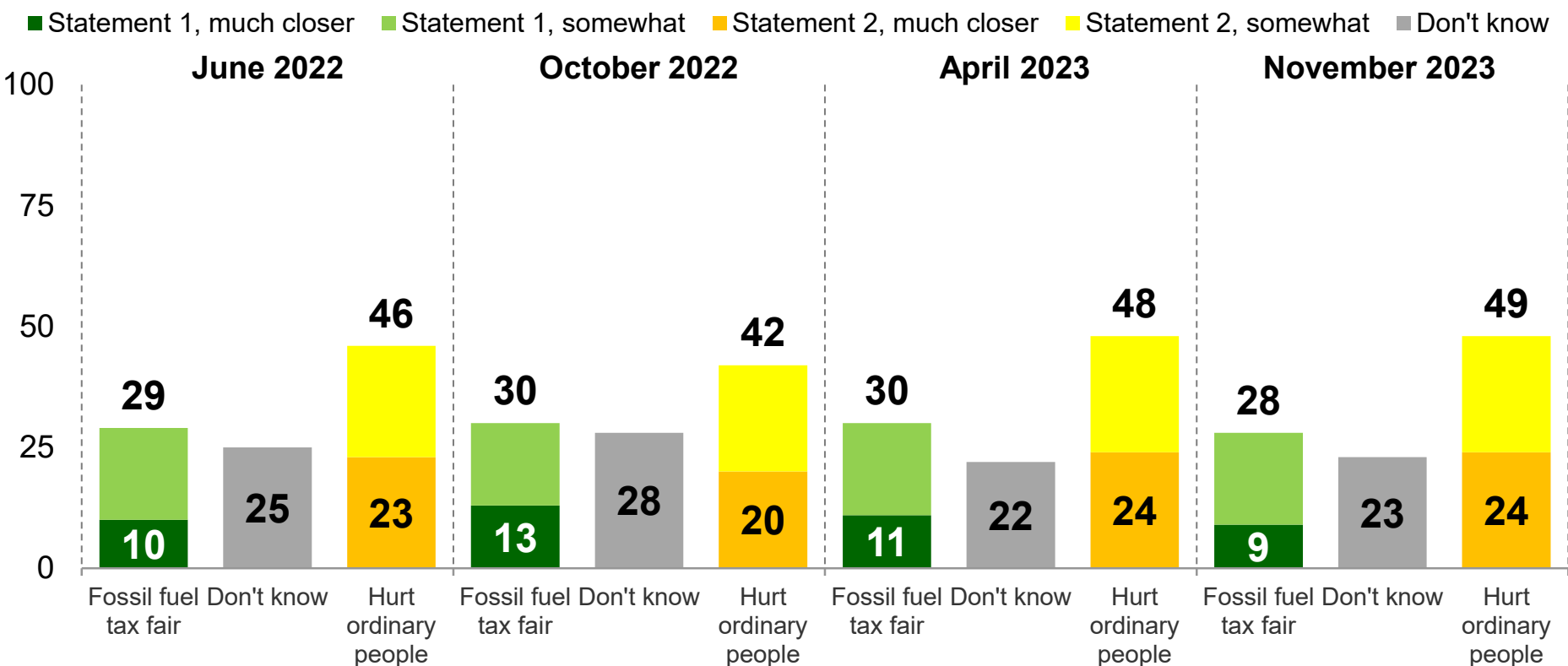
On the following pages are some pairs of statements. For each, please indicate whether the FIRST statement or the SECOND statement comes closer to your views, even if neither is exactly right.

Total, n=1,000; Likely, n=654; Blue Wall, n=66; Red Wall, n=155

A shrinking bloc of 28 percent supports a carbon tax

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, n=1,000 Shown to ½ sample split

Climate and energy policy

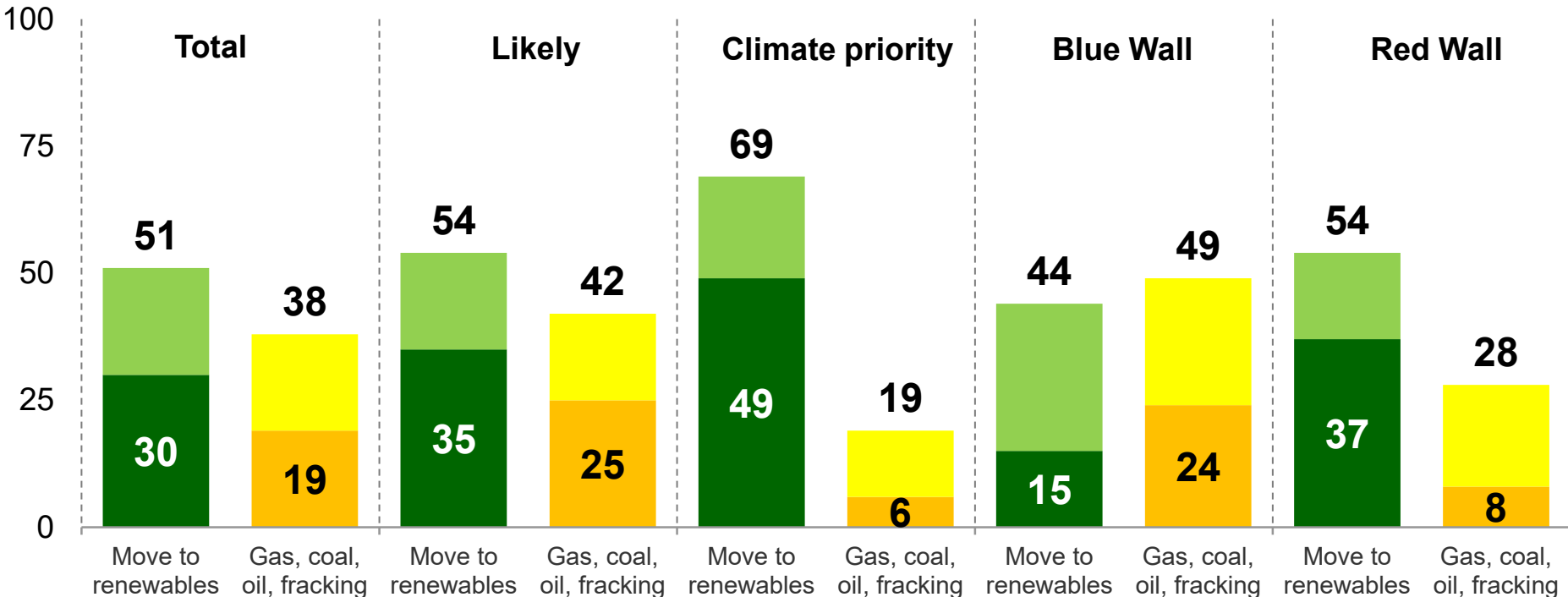


Public rejects all-domestic energy sources in favour or accelerated shift to renewable power, including intense majority in Red Wall

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

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

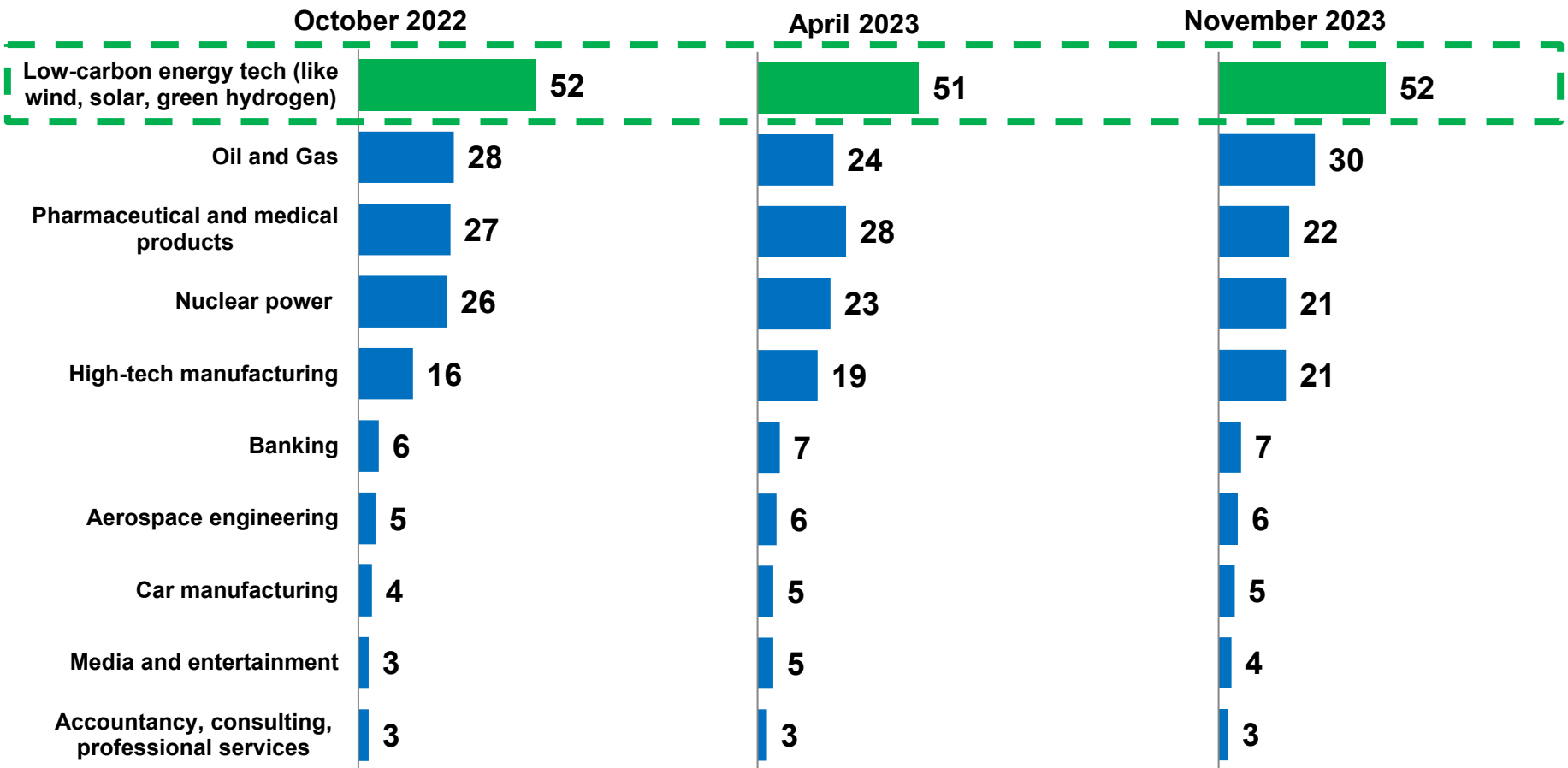


On the following pages are some pairs of statements. For each, please indicate whether the FIRST statement or the SECOND statement comes closer to your views, even if neither is exactly right.

Total, n=1,000; Likely, n=656; Climate Priority, n=217; Blue Wall, n=66; Red Wall, n=155; 1/2 Sample

Low-carbon energy remains top sector for government to support

Industries that government should support, by target

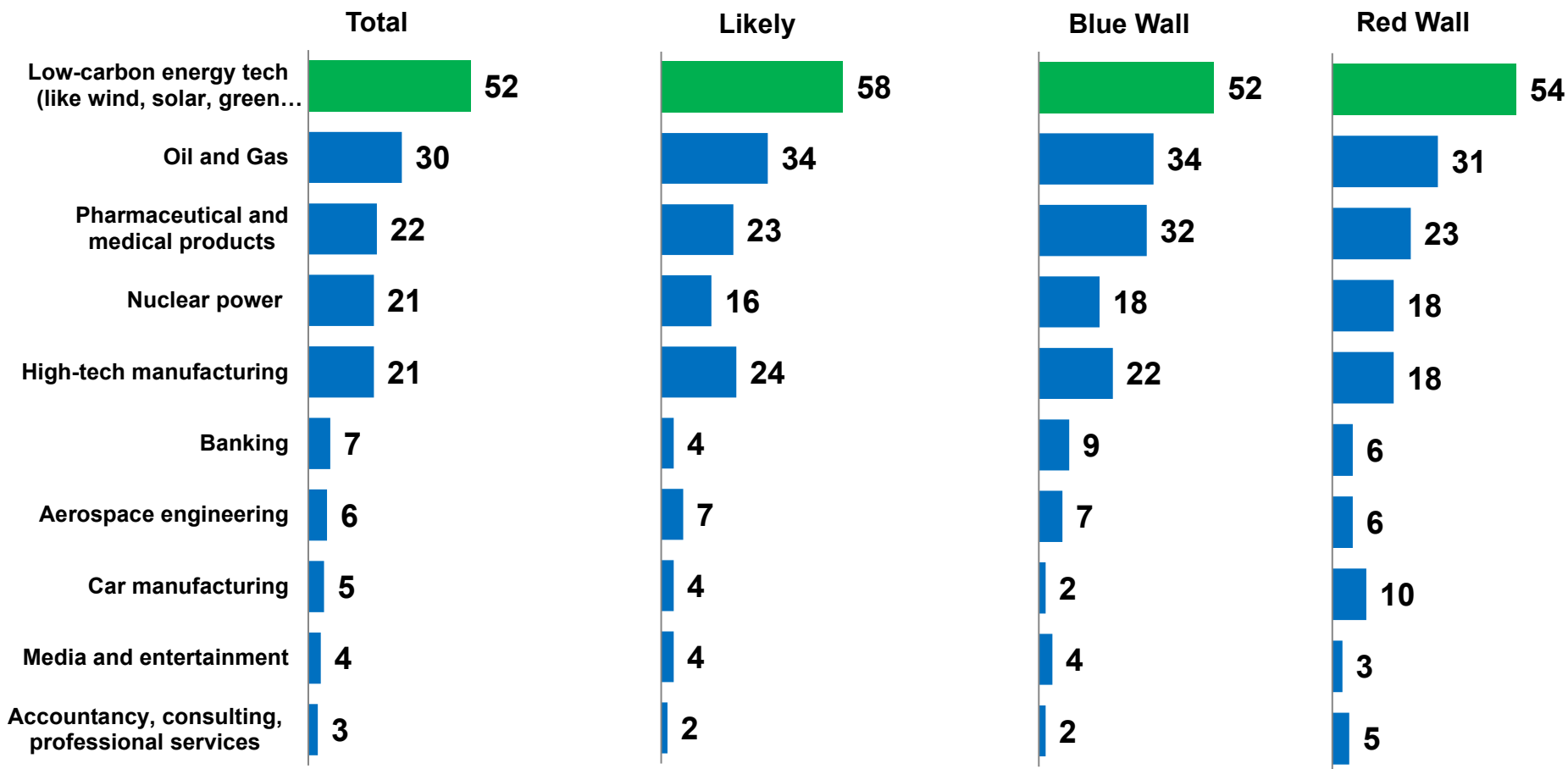


Which TWO of these industries would you MOST want the government to support and champion?

Total, n=1,000

The Red Wall seats were better off economically and pro-remain where the Liberal Democrats were more

Industries that government should support, by target



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

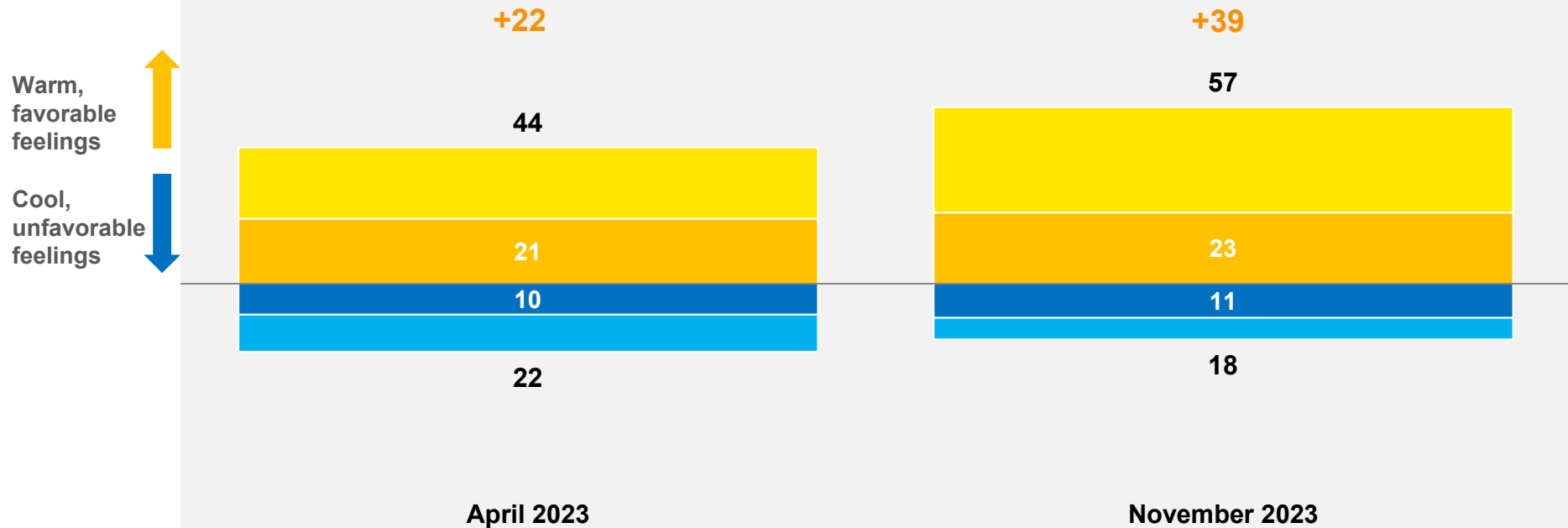
Total, n=1,000; Likely, n=654; Blue Wall, n=66; Red Wall, n=155

Among the public, there is an increased belief that to lead economically, Britain must invest in low-carbon industries

Feelings toward low carbon industry investments, total sample

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

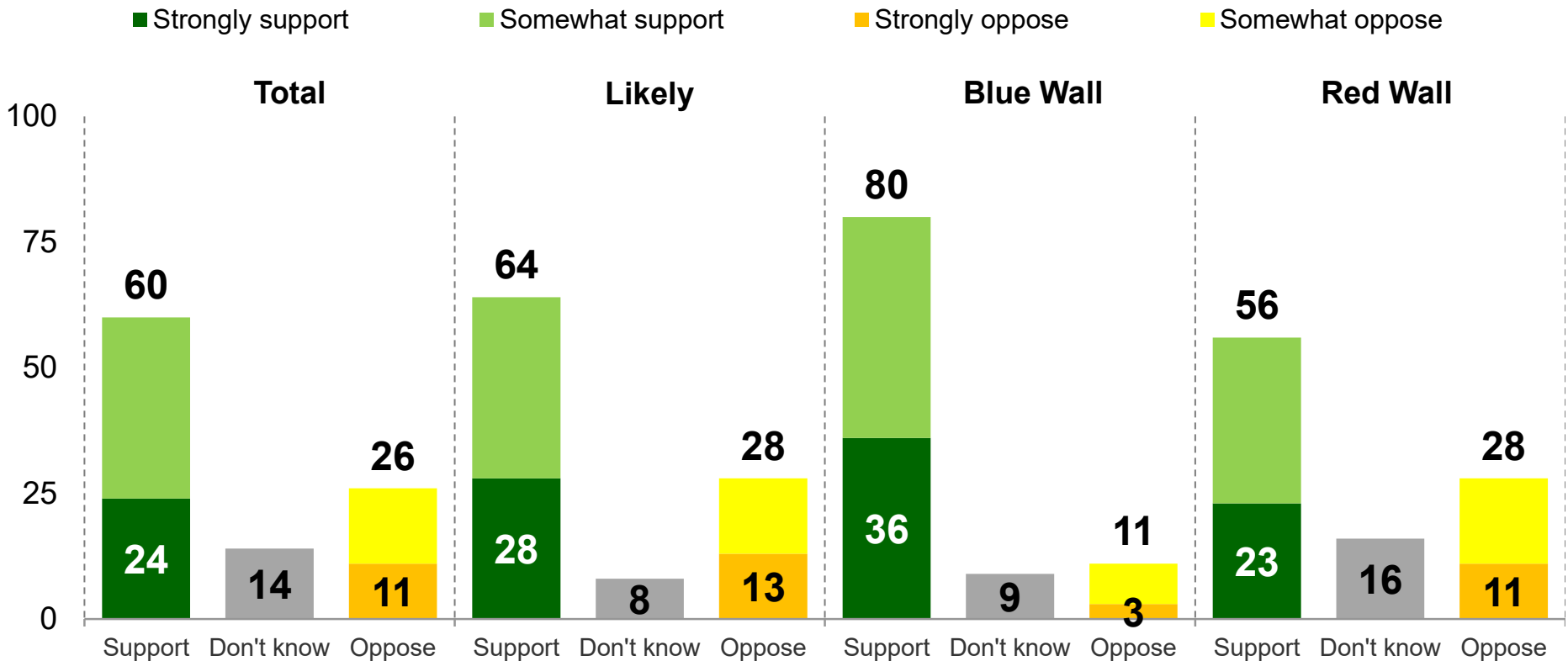
Because of the urgency of addressing climate change and leading economically, Britain acting on its own to favor investment in low carbon industries, introducing new regulations that favor them and reducing costs for households switching to new energy



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.

Big majorities for exploring in North Sea, but with little enthusiasm in Red Wall

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



Do you support or oppose each of the following?

Total, n=1,000; Likely, n=654; Blue Wall, n=66; Red Wall, n=155

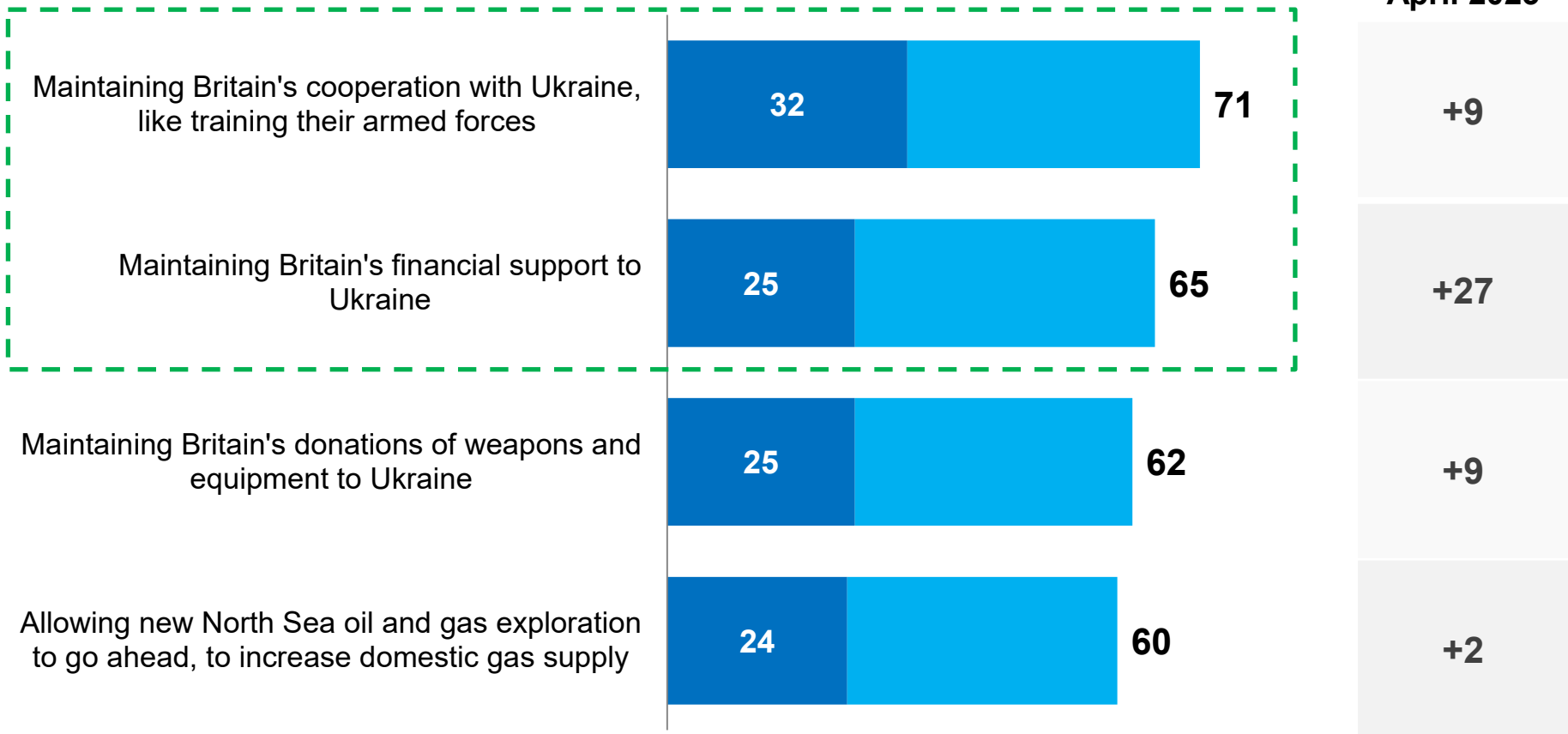
A photograph of a gas control room. The image shows a long, perspective view of rows of industrial valves and pipes. The valves are blue with red handwheels, and the pipes are yellow. The background is slightly blurred, showing more of the same equipment. The text "Ukraine and end of Russian energy" is overlaid in white on the left side of the image.

Ukraine and end of Russian energy

Almost two-thirds support maintaining financial support for Ukraine and 60 percent, new North Sea oil and gas exploration

Support for government response to war in Ukraine, total sample

■ Strongly support ■ Support somewhat



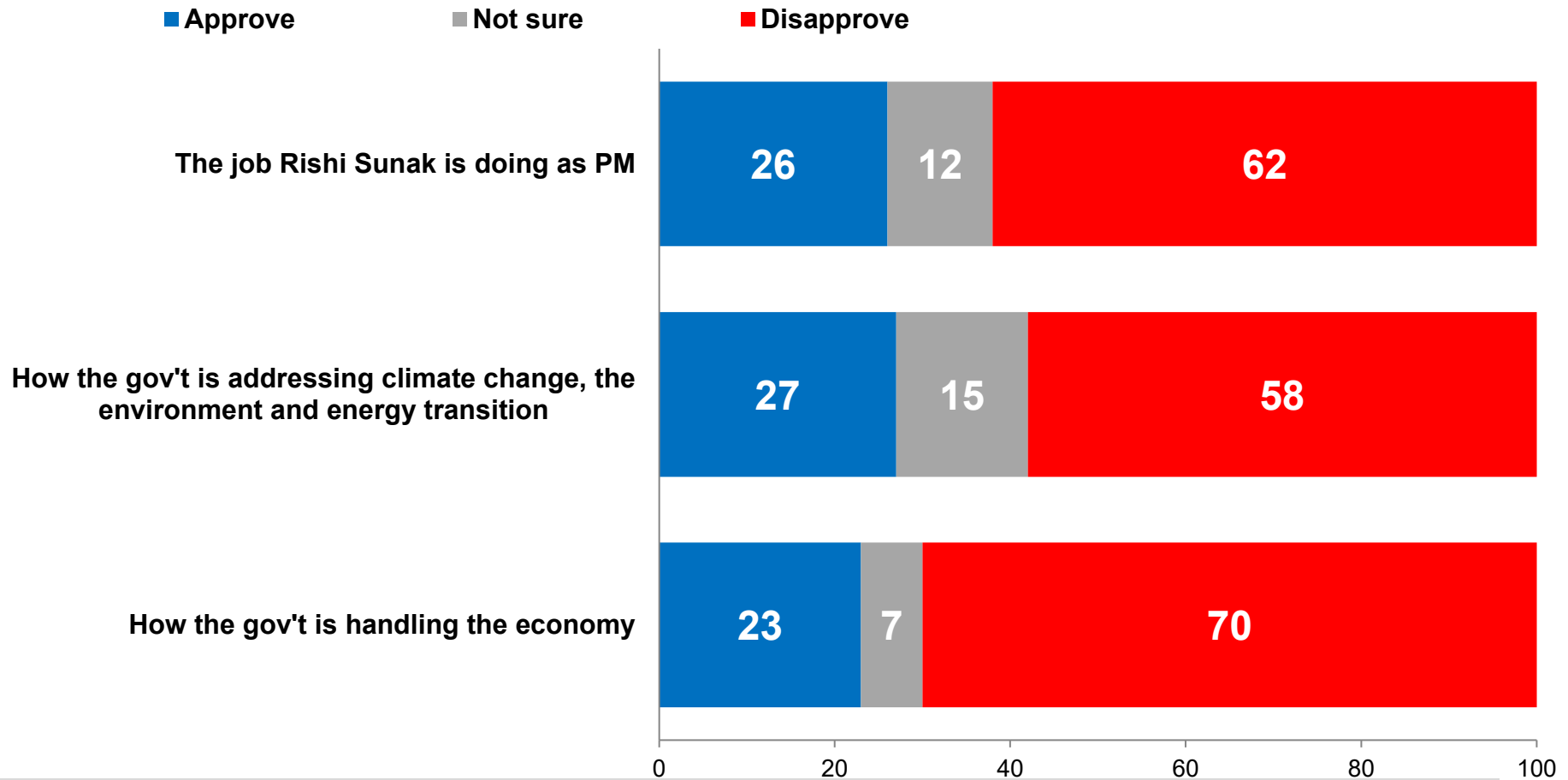
Do you support or oppose each of the following?

Total, n=1,000

Government policies



Sunak's overall approval rating at 26%, though large disapproval on handling economy



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

Total, n=1,000

A third believe the government has halved inflation of the past year. Little belief in achieving any of their other plans, including NHS waiting lists, more police & stopped boats

Plans achieved by government, total sample

Top 6

Halve inflation by the end of the year



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



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



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



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



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



Public only interested in government envisioning hiring more doctors and nurses

Most important **Conservative Vision for Britain**, total sample

Top 5

(NHS) To improve and solidify our NHS, Prime Minister Rishi Sunak announced a reform programme to train and double the number of new doctors and nurses here in Britain to stray from hiring from abroad and through international agencies

42

(IMMIGRATION) Prime Minister Rishi Sunak is dedicated to protecting our British way of life. He has pledged to "stop the boats" of migrants trying to reach Britain across the English Channel and plans to deport asylum-seekers to Rwanda

29

(CLIMATE) Prime Minister Rishi Sunak is committed to creating common sense climate guidelines that reduce our carbon emissions without hurting our British economy and taking money from people for whom every pound matters

26

(EDUCATION) To ensure Britain's youth continue to keep up with our everchanging world, Prime Minister Rishi Sunak has proposed the creation of a British standard qualification for those aged 16-19, making it mandatory for everyone to study some form of English and maths.

24

(SMOKING) Prime Minister Rishi Sunak and the Tory Government are committed to ending smoking in Britain and creating a smoke-free generation.

19

At the bottom of list is belief government has a vision for fundamentally changing Britain

Most important **Conservative Vision for Britain**, total sample

Bottom 4

(DEFENSE) The Tory Government has been a leader in protecting our country and our citizens. The Tories have backed our military, ensuring we have a strong defense, continue to support our allies in Ukraine in their fight against Russia, and play a leading role in boosting NATO

18

(HS2) The Conservative Party is committed to making tough decisions to fundamentally change our country. Proof of this was Prime Minister Rishi Sunak's decision to cancel the HS2 railway line, freeing up 36 billion pounds for new road and rail projects across the Midlands and North

17

(GENDER) The Tory Government won't be bullied by woke Labour politicians beholden to pushing their sex change agenda on Britons. Tories will not be bullied by any sex and push for greater free speech in our schools and in the NHS

15

(CHANGE) The Tory Government's mission is to fundamentally change Britain and we are the only ones who can deliver after 30 years of Labour refusing to make tough decisions. In the short term, the Tories will fight against special interest groups and bring the structural changes that are necessary to bring Britain forward

9

When hearing concrete Tory proposals, criminal justice reforms are front of mind for the public as well as creating new jobs from offshore oil & gas

Most important **Conservative Policies**, total sample

Top 5

Strengthen our criminal justice system by ensuring dangerous offenders are locked up for longer and rapists and sex offenders serve their full sentences

57

Create new offshore oil and gas licenses to reduce the U.K.'s dependence on imports from overseas and create 200,000 new jobs

40

Force criminals to attend court while their sentences are read out or face two additional years behind bars if they refuse

38

Strengthen renters' rights by banning "no-fault" evictions

33

Raise the legal age for buying cigarettes by one year, every year and restrict the flavours and appearance of vapes to make them less attractive to children

26

Public most interested in government's 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



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



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



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

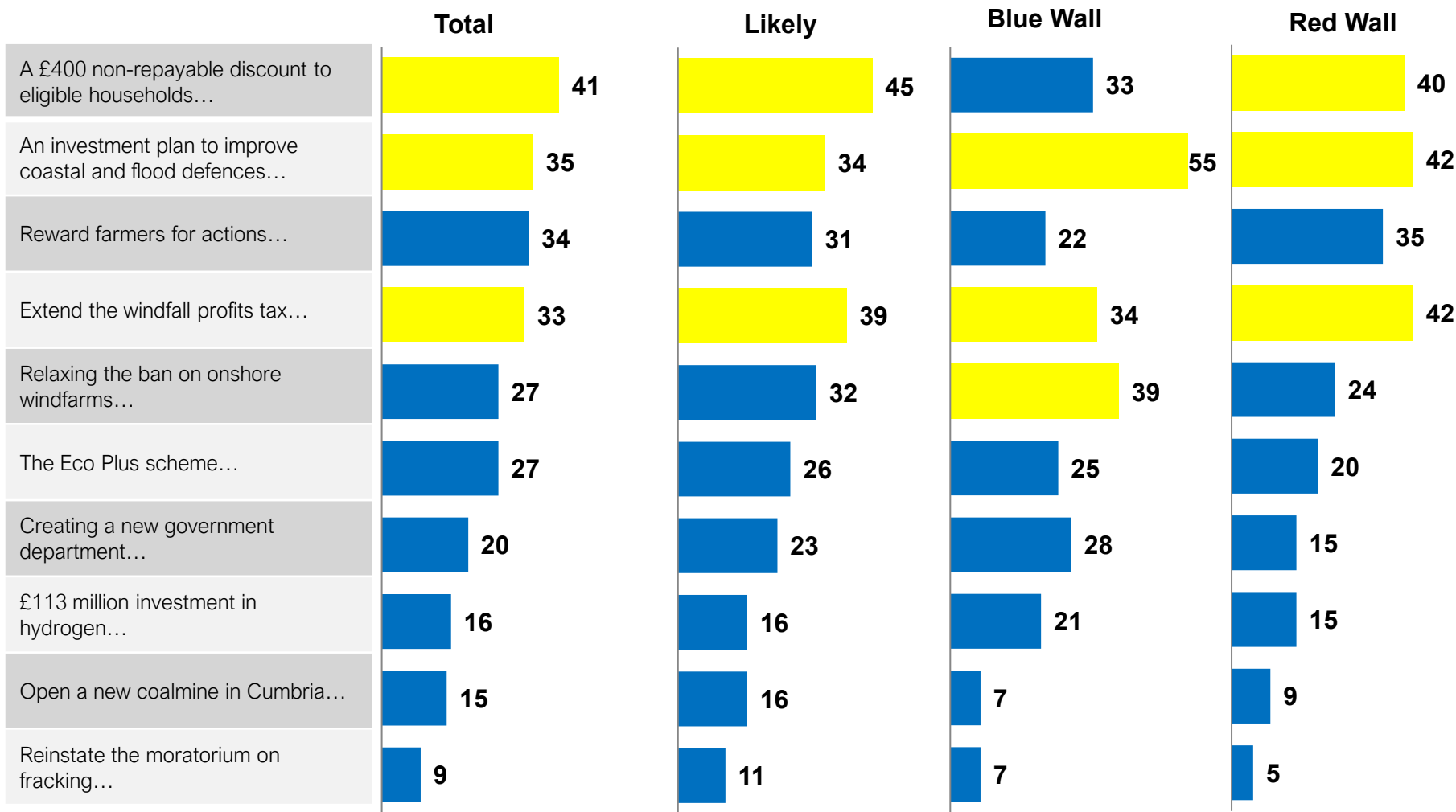


Relaxing the ban on onshore windfarms



£400 discount to help with energy bills & extending windfall profits tax top proposal for engaged & Red Wall. Blue Wall wants to see more investment in flood defences

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



Total, n=1,000; Likely, n=654; Blue Wall, n=66; Red Wall, n=155

Top powerful critiques center on lack of NHS investment, broken institutions and enriching donors

Most important **Labour Critiques of the Current Government**, total sample

Top 4

(NHS) Our NHS system is failing everyday Brits, and the Conservative Government is doing nothing about it. We are currently experiencing the longest wait times in years and have 7 million people having to pay for service or forced to go private. The Tories are trying to turn our healthcare system into the American healthcare system

41

(BROKEN) 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

37

(CORRUPTION) The Conservative Party is more concerned with making their donors and friends rich than helping the everyday Briton. They give bonuses to people pumping sewage into our rivers, freeze your pensions while energy firms make record profits and award their friends back-door contracts to enrich themselves

36

(DECLINE) For the past 13 years under Tory control, our government and country is in decline. We still have record inflation, crumbling infrastructure and rising crime all while the Tories bicker among themselves. We are no longer the proud, confident nation we were under leaders like Tony Blair

27

The public less focused on Conservatives blocking reforms or not giving a damn about climate

Most important **Labour Critiques of the Current Government**, total sample

Bottom 4

(COST OF LIVING) The Conservative Party has not done nearly enough to mitigate high inflation and a harsh decline in living standards. As we continue to see high prices on all everyday goods, the Tories are more concerned with gender battles and cancelling infrastructure projects than achieving goals that will benefit everyday Brits

25

(TORY CIRCUS) The Conservative Party has been too chaotic. Under Rishi Sunak's leadership, we have already seen cabinet members quit due to bullying and this chaos is causing business to avoid investing in our country, costing our economy billions

24

(CLIMATE CHANGE) Labour Shadow Secretary Ed Miliband says Rishi Sunak "does not give a damn" about climate change. Sunak sees the drive for net zero emissions as an obligation rather than a real opportunity for our economy. Britain could create jobs insulating our homes and building wind turbines, but the Conservatives refuse to take these opportunities

15

(BLOCKAGE) The Conservative Party is blocking all efforts to reform our country. They are a blockage that stops us from building roads, improving our electric grid, building 21st century labs, windfarms, and power stations. They are an obstacle to the aspirations of millions in the present and in the future

15

For Labour, an NHS centered vision most striking, followed by revolutionizing energy and taking country forward

Most important **Labour Theme for Britain**, total sample

■ = Top 3

Top 5

(NHS) The Labour Party is the only party committed to reforming the NHS. Labour will provide the NHS with the funding it needs to reduce wait times to no more than 7 days, ensure there are more operations, and prevent sickness rather than solely treating patients

41

(CLIMATE CHANGE) Britain has the opportunity to revolutionize British energy. With the proper investment, we can bring our national grid into the 21st century and ensure Britain is creating only clean energy by the year 2050

28

(HISTORY) The Labour Party is the Party that has brought our country forward. The Labour Party has increased our minimum wage, created the Sure Start Program, decreased crime by a third, shortened NHS wait times to their shortest in history and brought half a million children out of poverty.

27

(LABOR) The Labour Party will partner with British business to strengthen workers' rights and protect all workers. Labour will scrap zero-hour contracts, end the practice of fire and rehire, and make business pay workers with a real living wage

25

(WORKING CLASS) The Labour Party is the only true working-class party and has always worked for the everyday Brit. The Conservatives are led by an elitist, out-of-touch leader who watches the cost-of-living crisis from his short-haul helicopter. The Labour Party is solely focused on the interests of working people

23

Bulldozing regulation & Technical Excellence Colleges are less noticed

Most important **Labour Theme for Britain**, total sample

Bottom 4

(INVESTMENT) Labour is committed to bringing in billions in private investment to protect and create jobs. Moving past Tory chaos will attract more businesses to invest in our economy and create partnerships for our national interest

17

(EVOLUTION) The Labour Party has gone through an evolution over the past 13 years. We are no longer only interested in protest and are willing to work with anyone to bring Britain forward. We are no longer the Party of Corbyn and have rooted all Anti-Semitism out of our party.

15

(EDUCATION) Labour proposes creating Technical Excellence Colleges that have stronger links to local economies and trains a new generation of lab workers, automotive engineers, computer scientists, nuclear technicians, and builders to provide our youth with 21st century skills and more opportunities

15

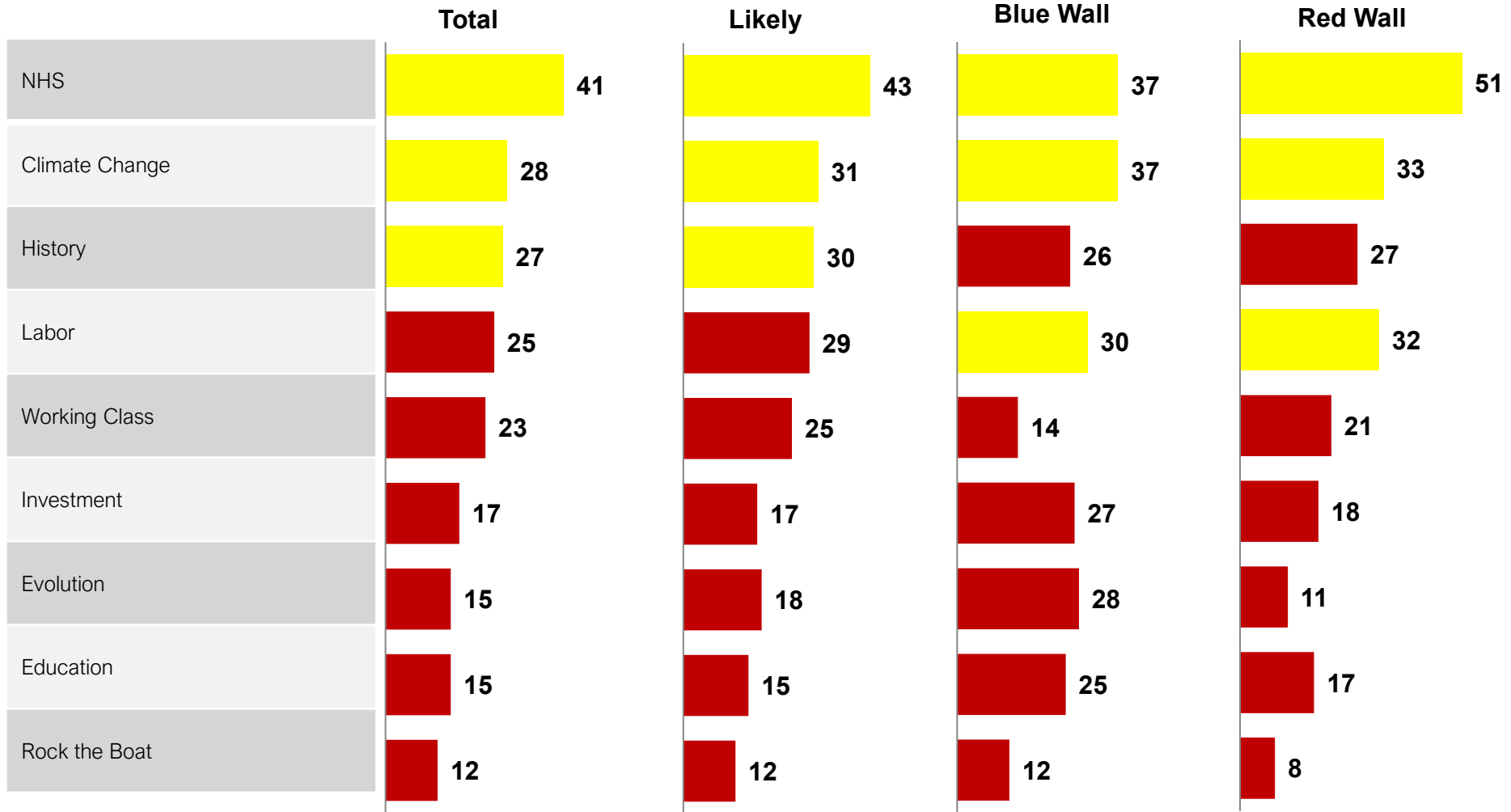
(ROCK THE BOAT) The Tory Government has used government to hold back all innovation. Labour will rock the boat to push through reforms Britons need. From improving our infrastructure to building more housing, Labour will bulldoze through red tape that is holding our country back

12

All targets resonate with Labour's promise of reforming the NHS, followed by its climate vision; equal in Blue Wall

Plans on energy proposed by government, by target

■ = Top 3

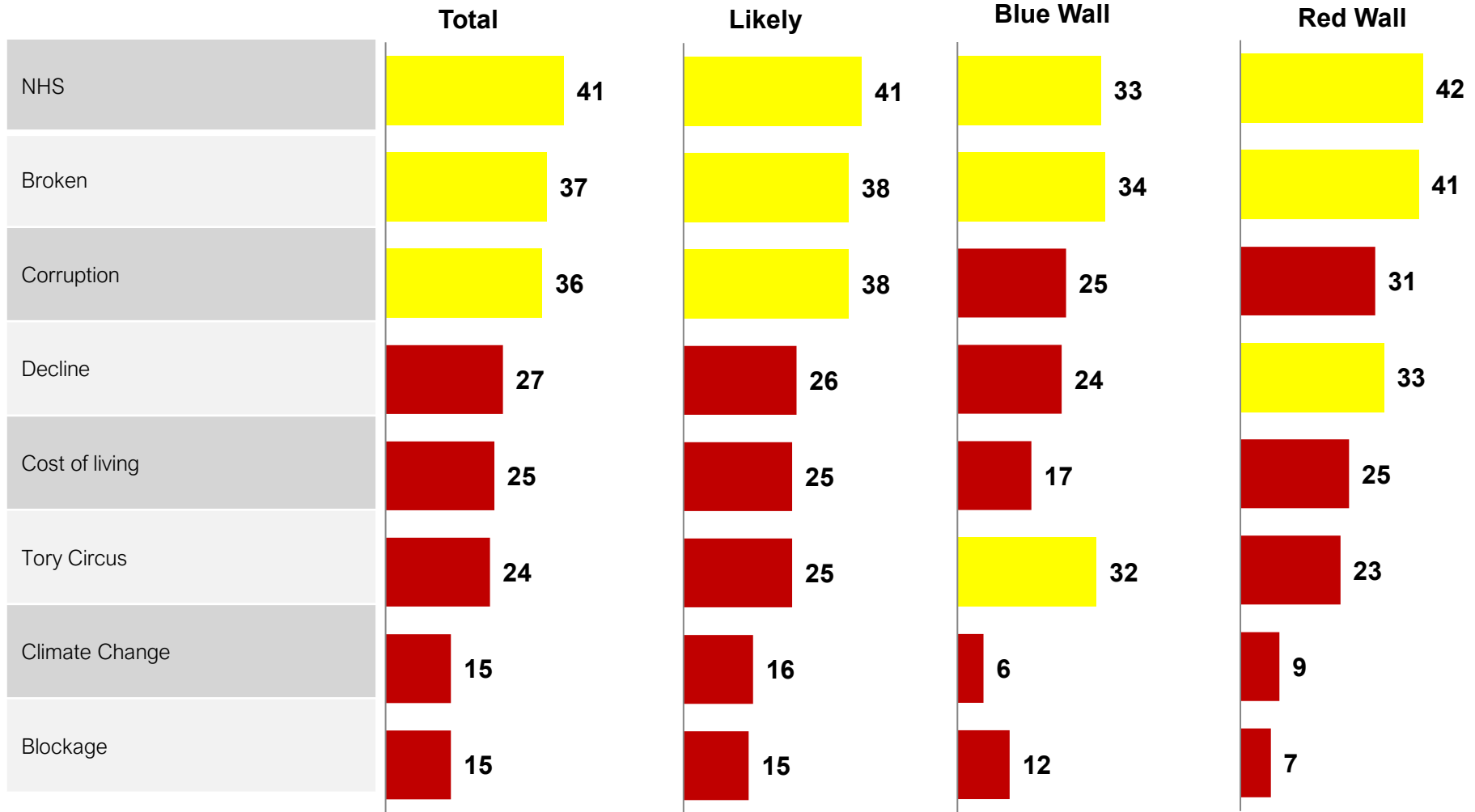


Total, n=1,000; Likely, n=654; Blue Wall, n=66; Red Wall, n=155

Blue Wall Brits agree the Tories have been too chaotic recently and most target groups see British institutions as broken and in need of repair

Plans on energy proposed by government, by target

■ = Top 3



Total, n=1,000; Likely, n=654; Blue Wall, n=66; Red Wall, n=155

Top climate and energy policies are freezing energy bills, followed by creating new “green” jobs and increasing onshore wind & solar projects

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

41

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

31

Double onshore wind power generation and triple solar power generation

30

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

29

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

28

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

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

25

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

24

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

19

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

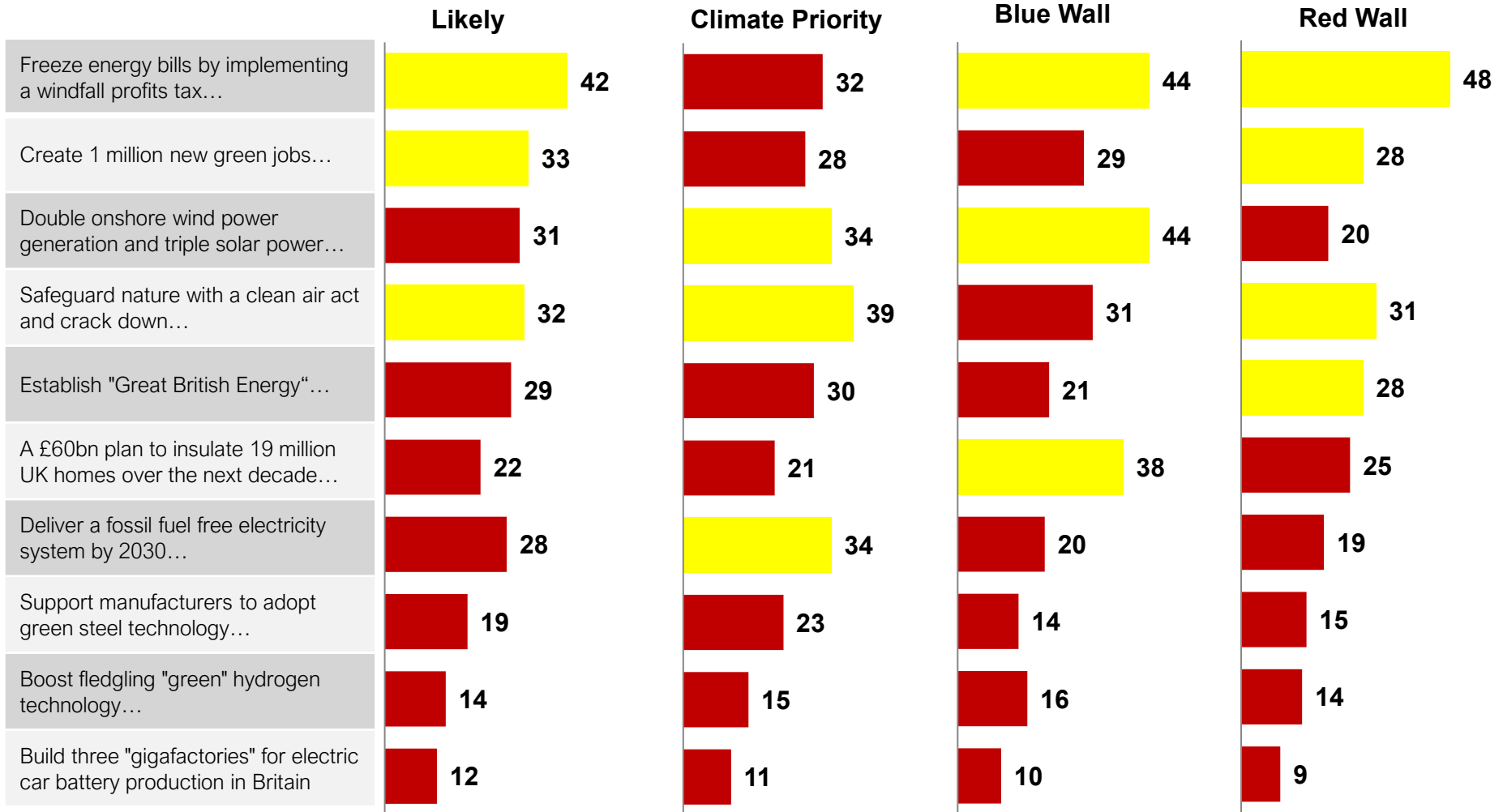
14

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

10

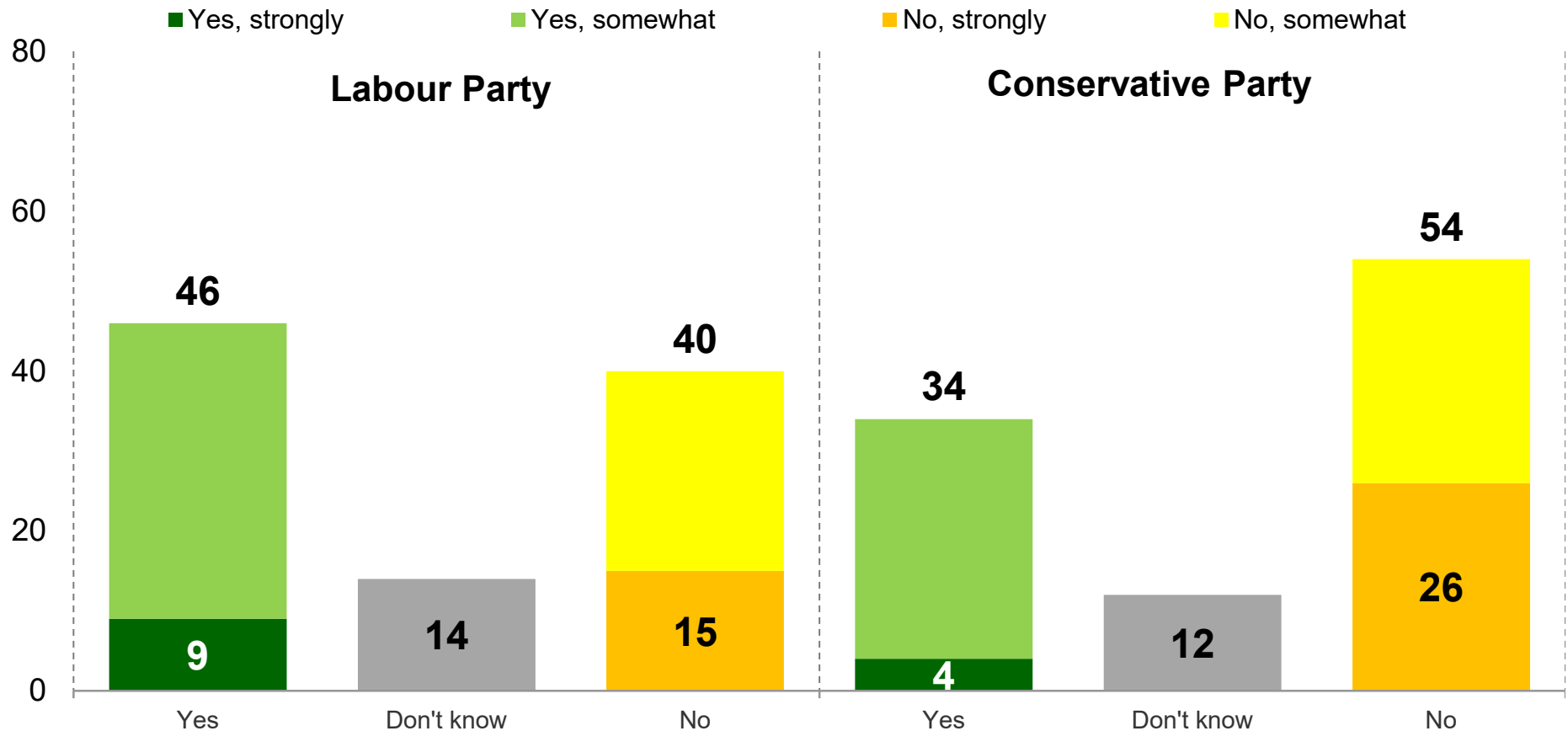
Freezing energy bills most popular policy for all targets, followed by creating 1 million jobs and safeguard nature with crackdown

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



Total, n=1,000; Likely, n=654; Climate Priority, n=217; Blue Wall, n=66; Red Wall, n=155

Belief Labour will try to achieve plans matches vote, while there are more thinking Tories will try



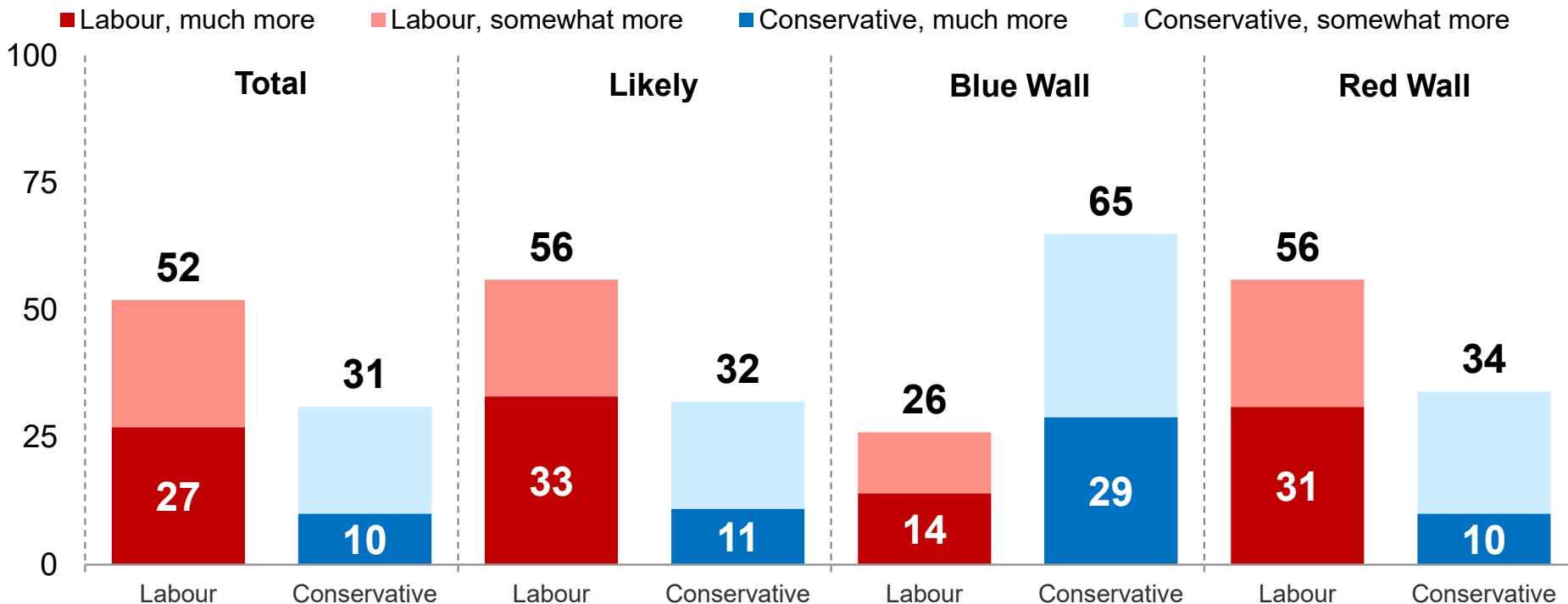
Now that you have read some of the plans the **Labour Party/Conservative Party** has for Britain and their vision for our country, do you believe they will actually try to achieve these plans?

Total, n=1,000

Dramatically more support for Labour narrative on last 13 years vs Conservatives about 30 without tough choices; a quarter of Blue Wall remain-Tories support the former

Labour Party leaders say the Tories have overseen our government for the past 13 years and have nothing to show for it. Inflation is out of control with no end in sight. There have been no infrastructure improvements, no efforts to tackle climate change, and no efforts to modernize our electricity grid. We can't sit back and wait for the Tories to do something; it is time to halt our national decline and revolutionize Britain.

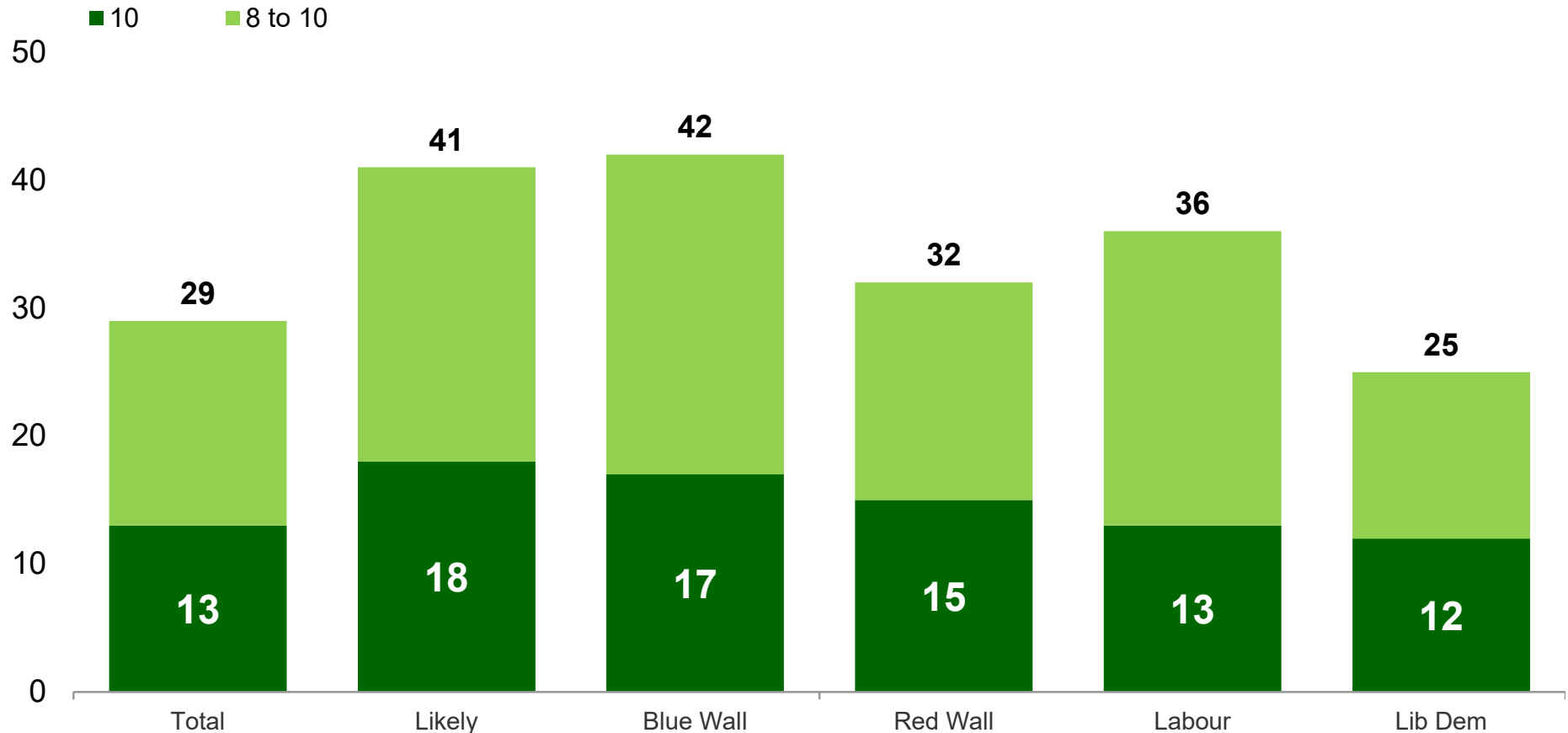
Prime Minister Rishi Sunak says the Labour Party had 30 years in charge to achieve the reforms they speak of today. The Labour Party refused to make the tough choices needed to bring real reform to Britain and prepare us for the challenges we are facing today. The Conservative Party has had only 13 years and under Prime Minister Rishi Sunak's leadership, a Conservative Government is prepared to make the tough decisions to bring real reform for everyday Britons.



Now you will read two statements from the point of view of members from the Labour and Conservative parties. After you read both, please select which comes closest to your point of view, even if neither is exactly right.

Total, n=1,000; Likely, n=654; Blue Wall, n=66; Red Wall, n=155

Four in ten likely and Blue Wall voters rate the importance of climate change in their vote at 8 to 10 on 10-point ladder scale

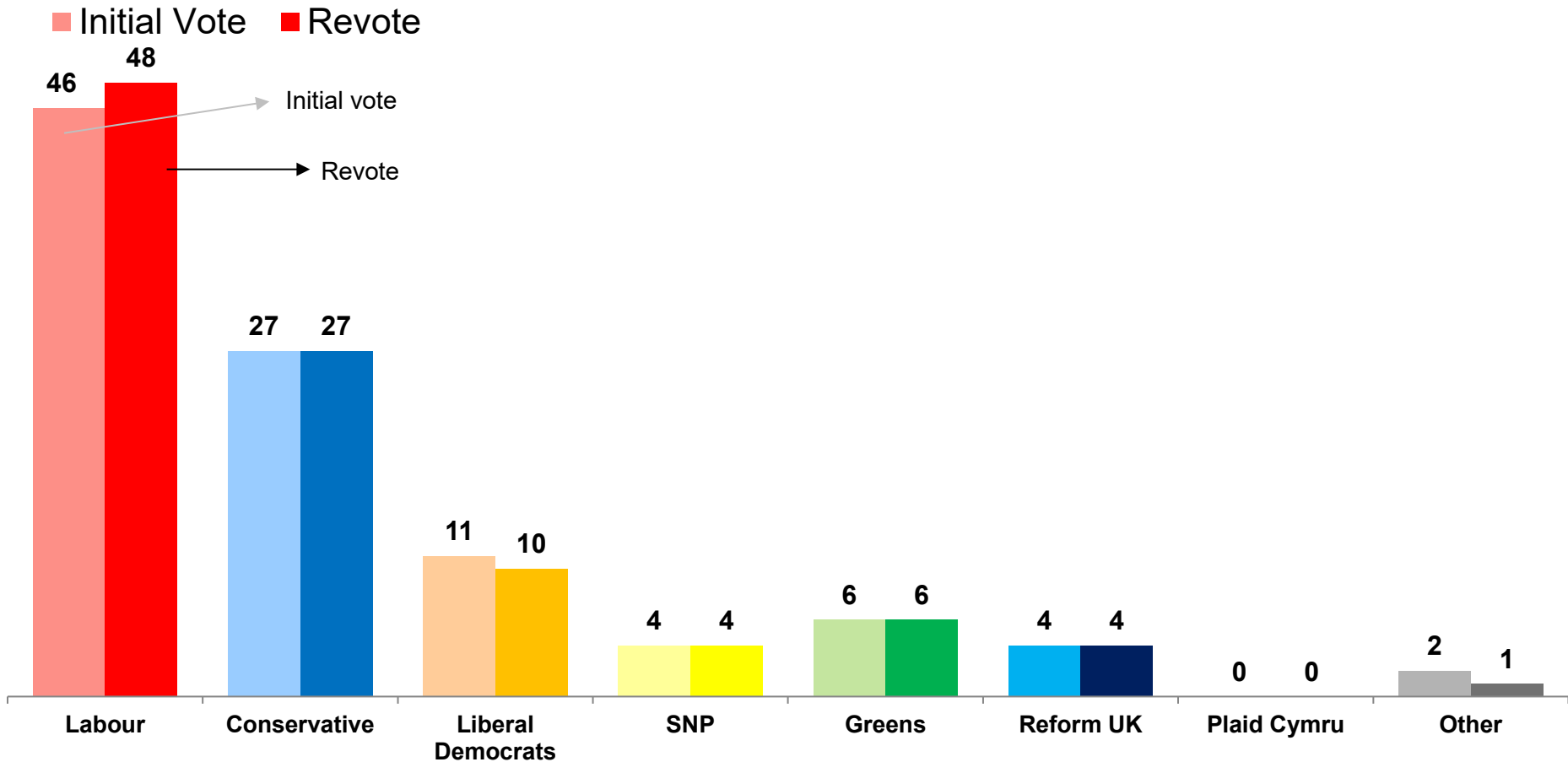


On a scale of 0 to 10, where 10 is very important in deciding how you will vote and 0 is not at all important in deciding how you will vote, how would you rate the importance of a parties' climate change platform in deciding which party you will vote for in the next election?

Total, n=1,000; Likely, n=656; Blue Wall, n=66; Red Wall, n=155; Labour, n=330; Liberal Democrat, n=70

Poll conducted after both party conferences; Labour's 19-point lead grows to 21 points after hearing full government & Labour agenda

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



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

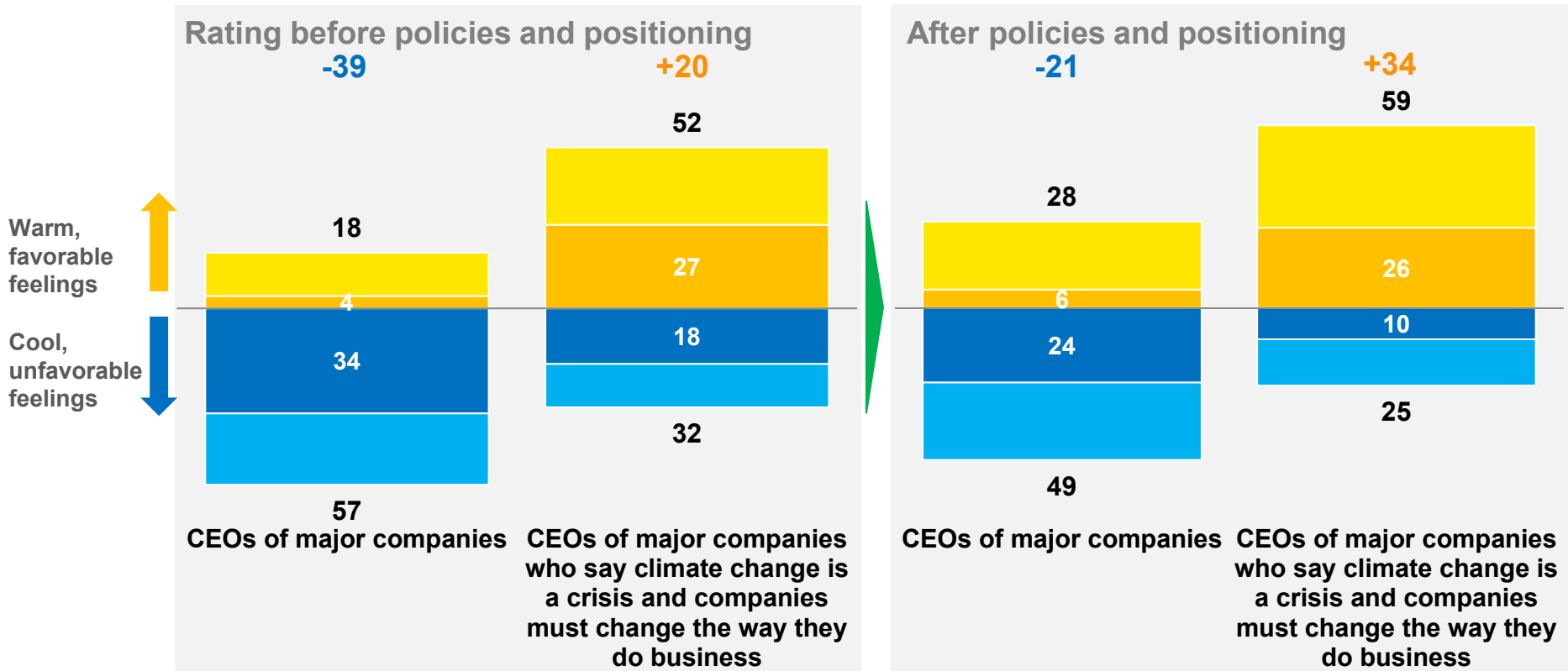
Perceptions of energy sector



Messaging improves favourability of CEOs who say climate change is a crisis and CEOs in general

Feelings toward CEOs pre and post policies and positioning, total sample

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

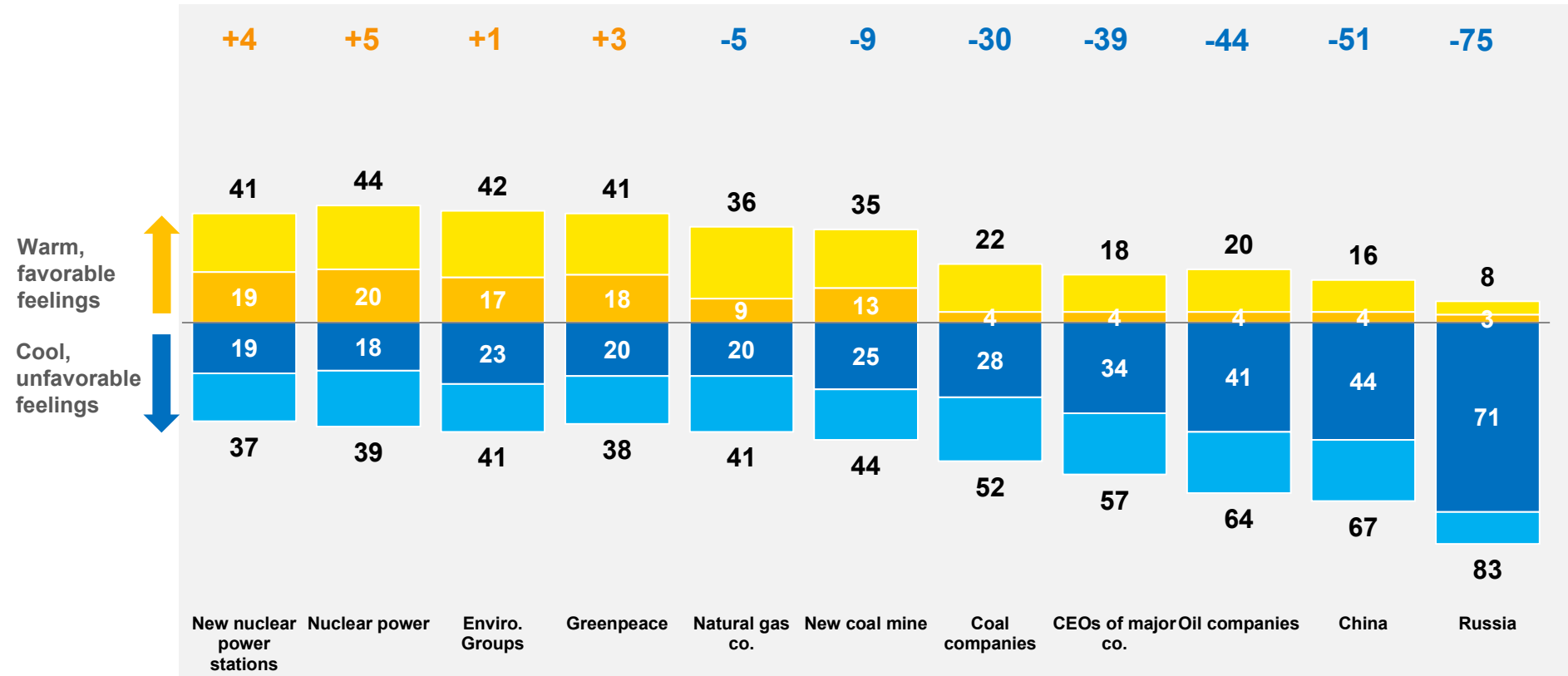


Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVORABLE feeling; zero meaning a VERY COLD, UNFAVORABLE feeling; and fifty meaning not particularly warm or cold.

Nuclear power and new nuclear power stations receive favourable ratings, but not new coal; oil sector in own negative space

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=1,000

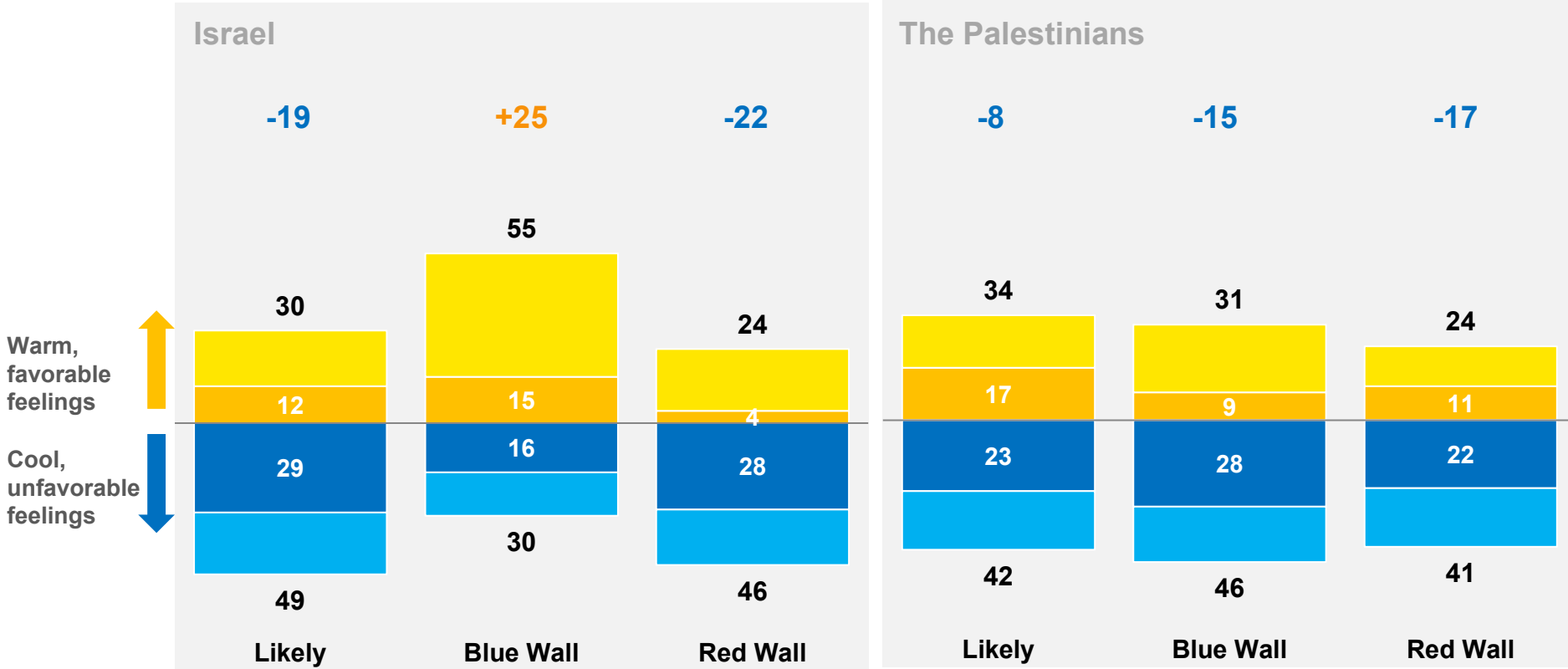
Israel wars and Palestine



Likely voters show less warmth for Israel; Blue Wall warm to Israel and cool to Palestinians; Red Wall cool to both

Feelings toward international conflicts, total sample

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

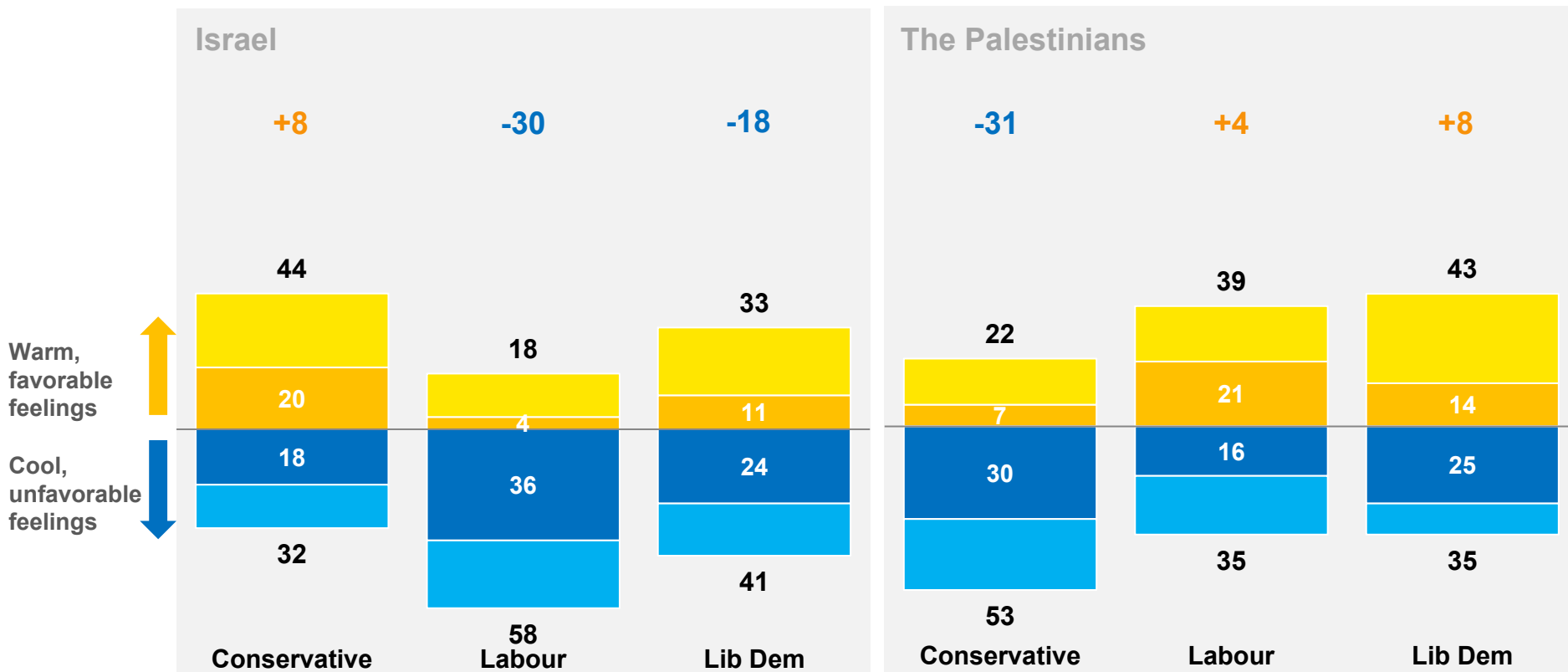


Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVORABLE feeling; zero meaning a VERY COLD, UNFAVORABLE feeling; and fifty meaning not particularly warm or cold.

Tories warm to Israel and very cool to Palestinians; Labour and Liberal Democrats more favourable of the Palestinians & cool to Israel

Feelings toward international conflicts, total sample

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



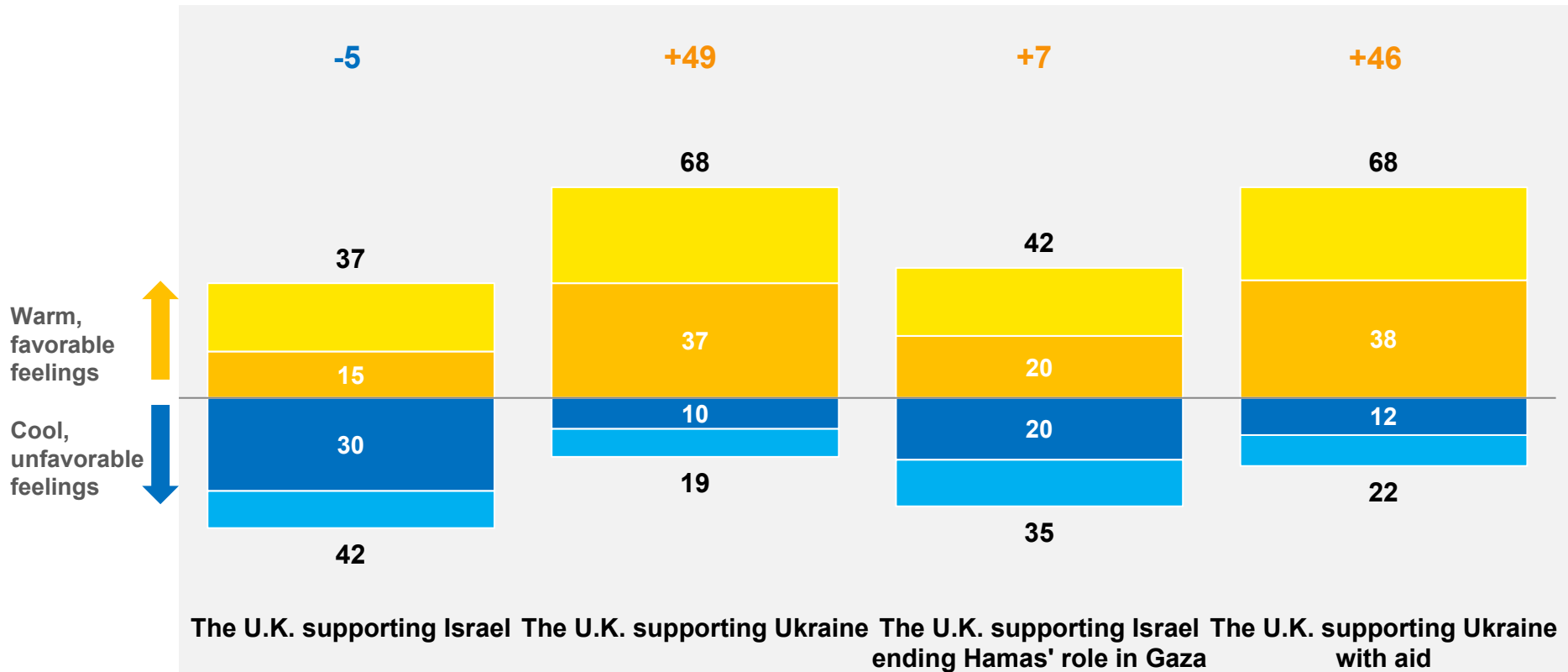
Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVORABLE feeling; zero meaning a VERY COLD, UNFAVORABLE feeling; and fifty meaning not particularly warm or cold.

Party Identification: Labour, n=330; Liberal Democrat, n=70; Conservative, n=250

Stark difference in views towards the Ukraine and Israel conflicts among the public

Feelings toward international conflicts, total sample

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

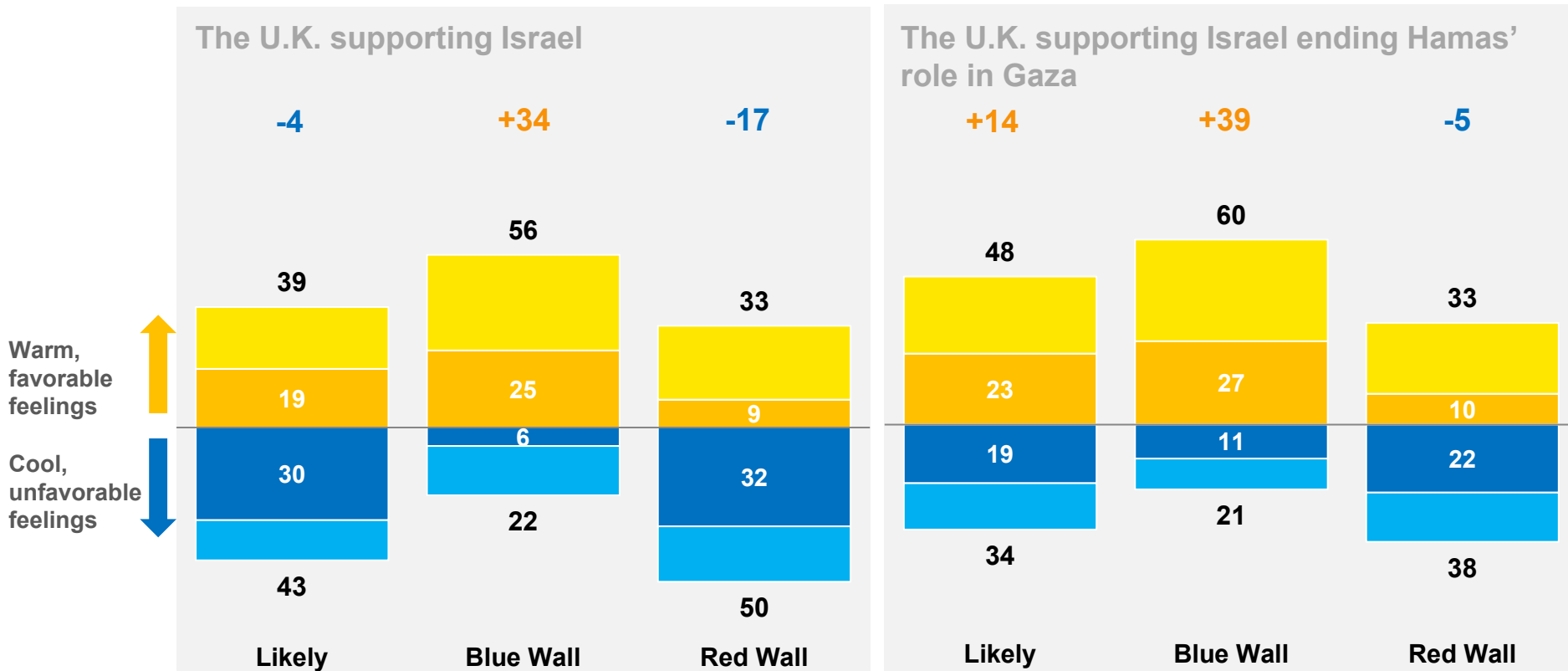


Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVORABLE feeling; zero meaning a VERY COLD, UNFAVORABLE feeling; and fifty meaning not particularly warm or cold.

Feelings towards Israel flip once introducing ending Hamas' role in Gaza

Feelings toward international conflicts, total sample

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



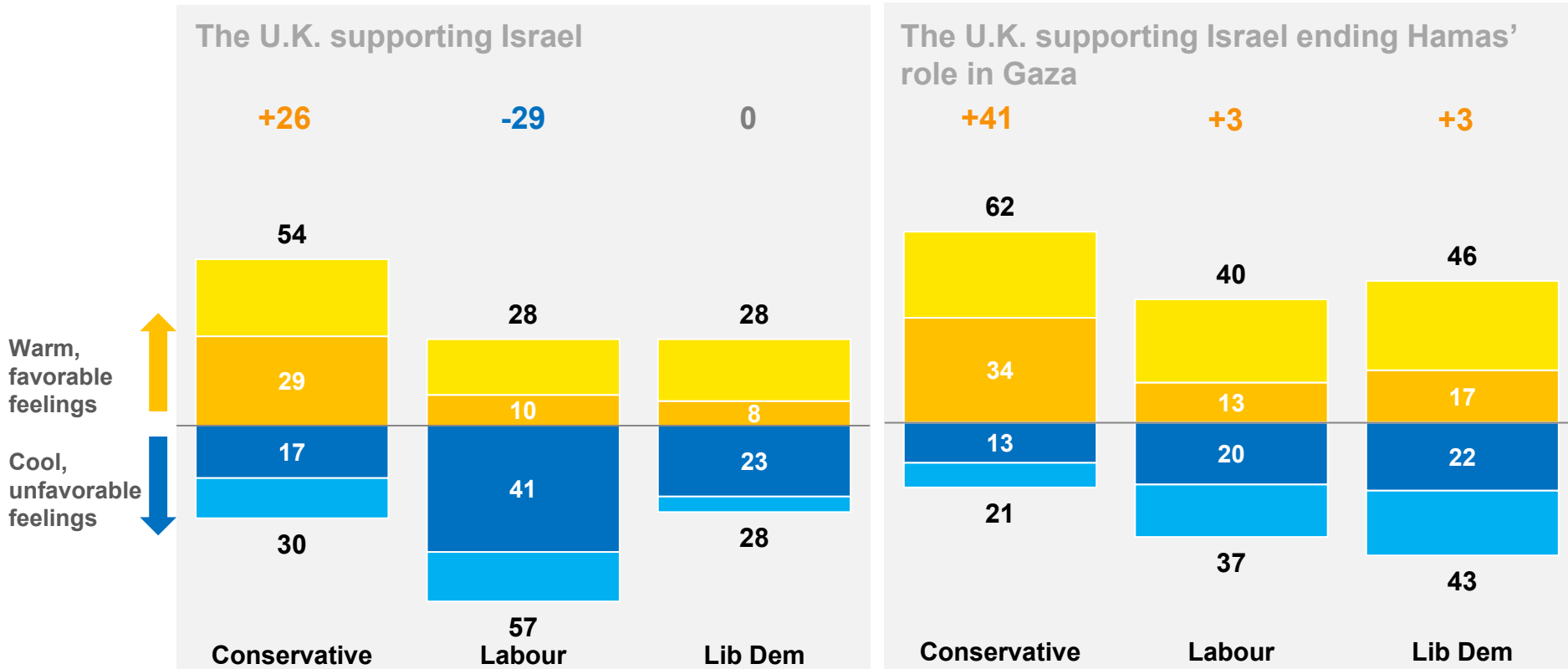
Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVORABLE feeling; zero meaning a VERY COLD, UNFAVORABLE feeling; and fifty meaning not particularly warm or cold.

Total, n=1,000; Likely, n=656; Climate Priority, n=217; Blue Wall, n=66; Red Wall, n=155; 1/2 Sample

Supporting war to end Hamas' role has cross-party support, though among Labour, very cool larger than very warm

Feelings toward international conflicts, 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.

Party Identification: Labour, n=330; Liberal Democrat, n=70; Conservative, n=250

A blue-tinted photograph of two men in suits shaking hands. A woman is visible in the background, also smiling. A horizontal green line is drawn across the middle of the image, passing through the handshake. The letters 'BP' are printed in white on the left side of the image, above the green line.

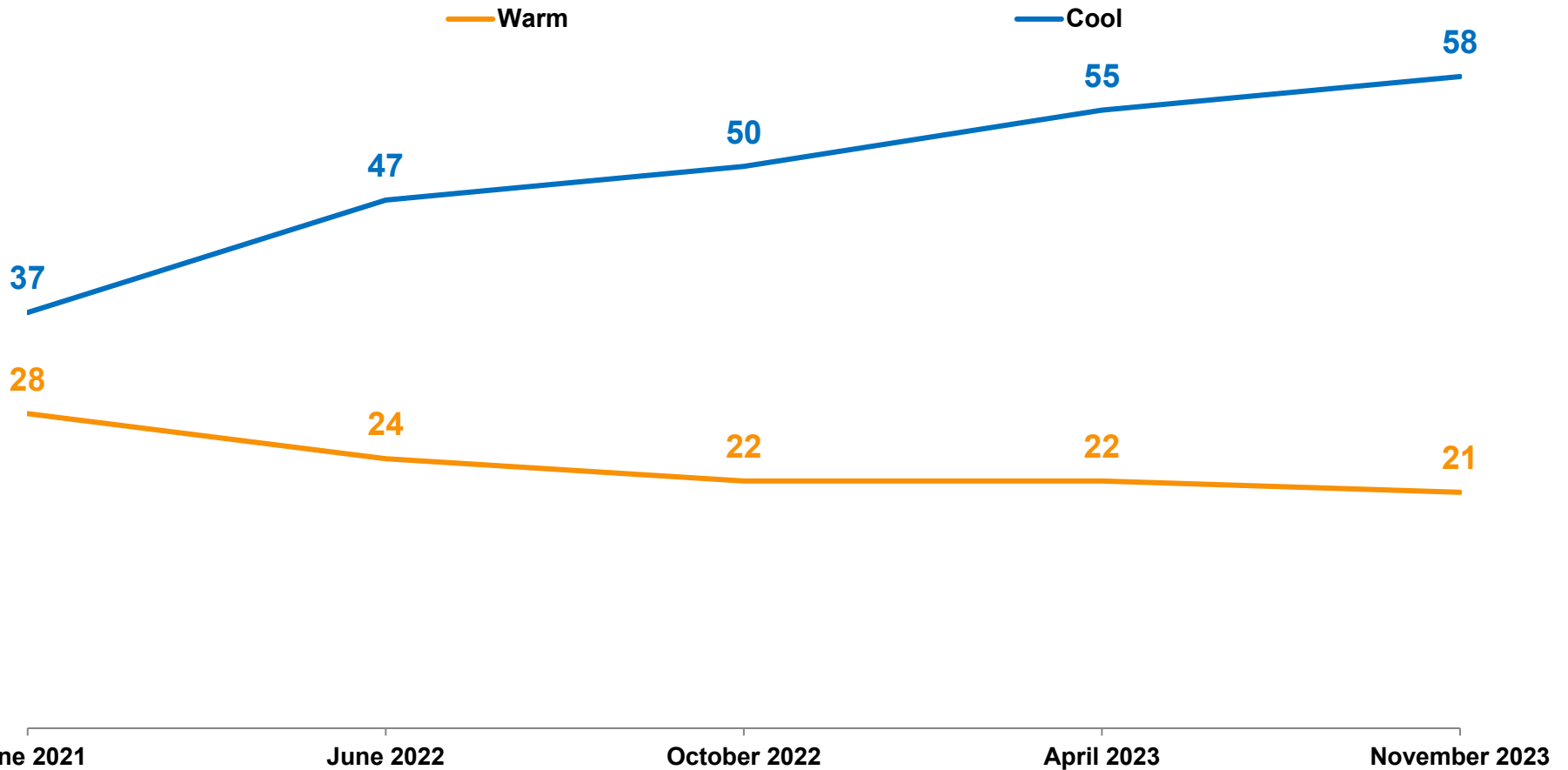
BP

What you need to know - BP

- BP's standing has steadily grown more negative. The current perception of BP's brand put it in a similar brand space with ExxonMobil and Shell.
- BP gets its highest marks for being a partner of Britain's energy projects. Many more people rate this measure favourably, as opposed to making British energy more affordable.
- The fewest responses – indicating uncertainty – is whether BP is advocating the right policies to combat climate change.
- Oil companies are in a negative space of their own in terms of standing among the British public
- On positive messages for BP, their pulling out of the Russian energy market scores significantly better than all the others, including building up Britain.
- But positive messages significantly improve BP's standing.
- All of BP's messages test stronger than Exxon and Shell

Feelings towards BP have grown more negative since 2021

Feelings toward companies and environmental actors, **BP**

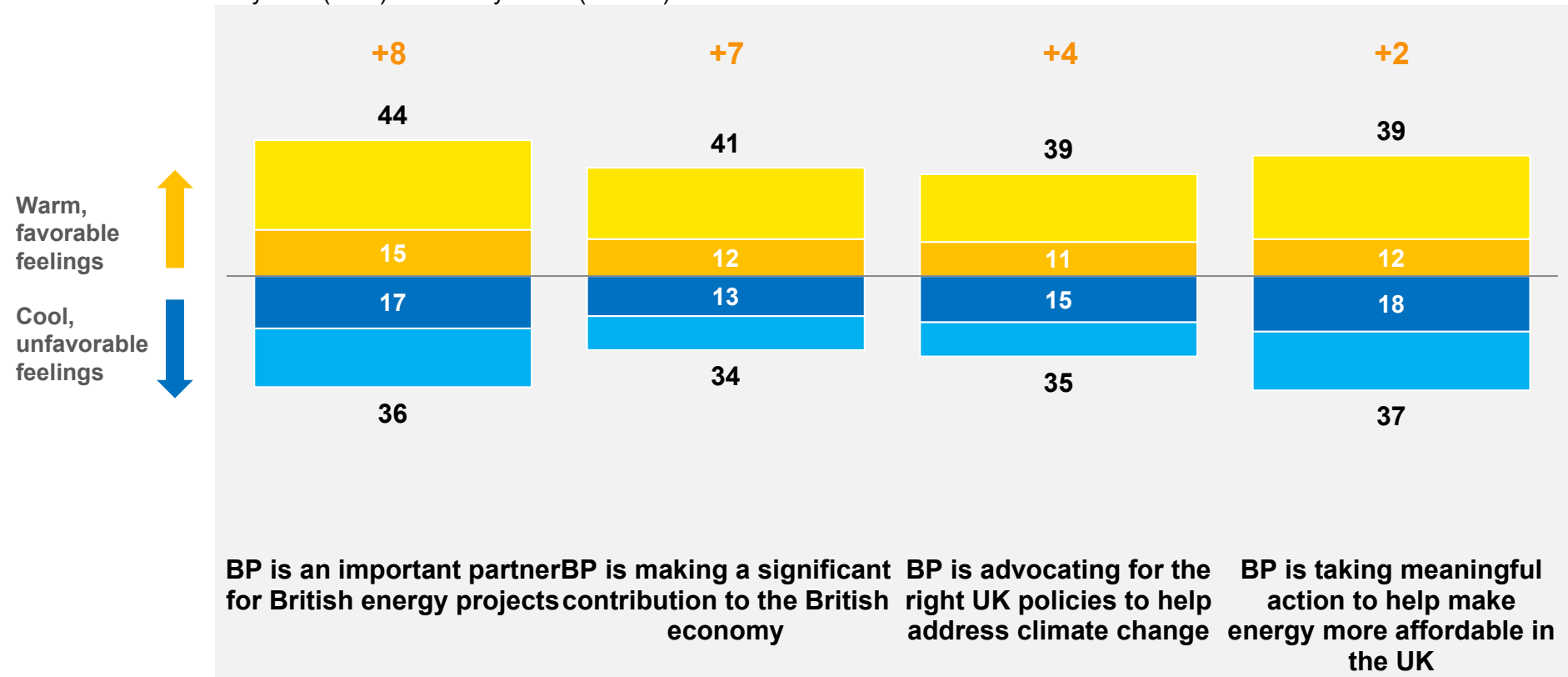


Please rate your feelings toward some people and organisations, with 100 meaning a very warm FAVOURABLE feeling; 0 meaning a very cold, UNFAVOURABLE feeling; and 50 meaning not particularly warm or cold. You can use any number from 0 to 100

Britons see BP as an important partner but not doing enough to make energy more affordable

Feelings toward BP messaging, total sample

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



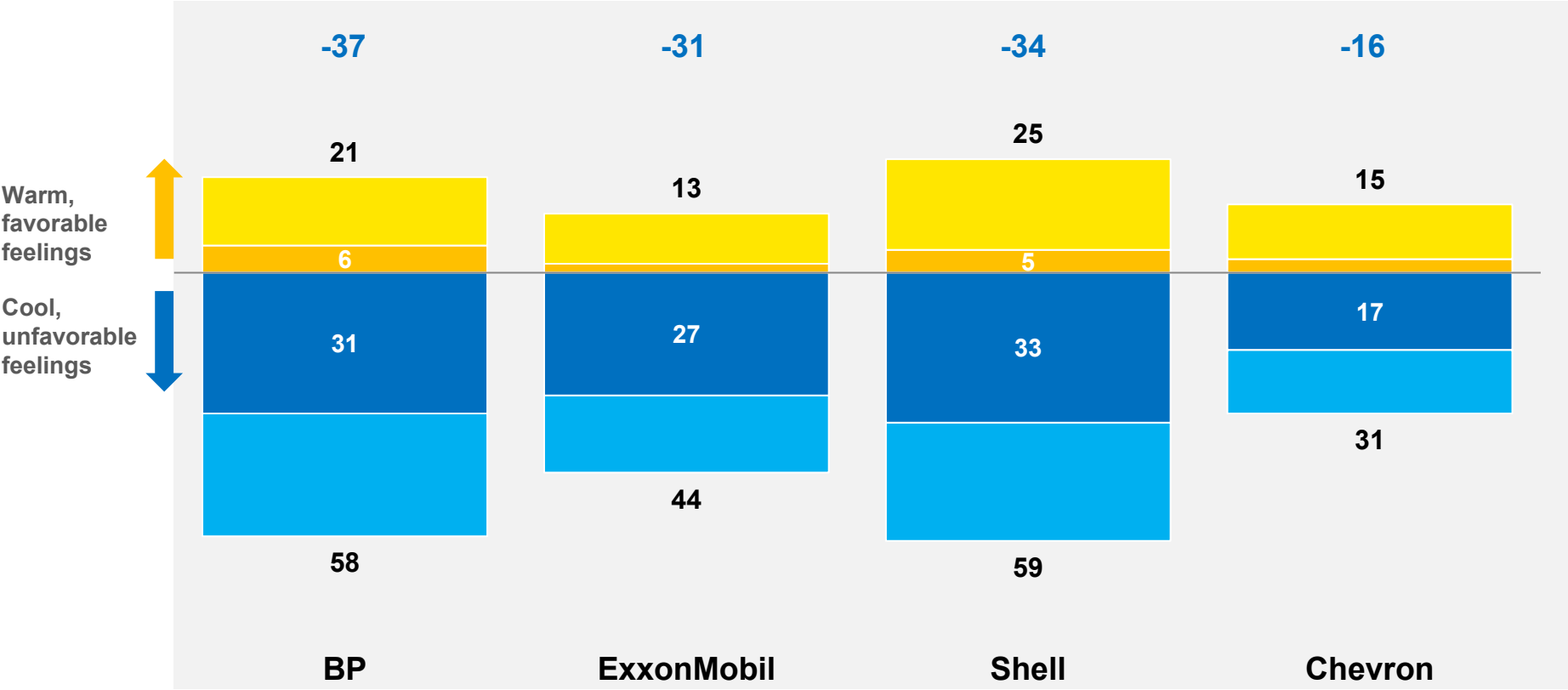
Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.

Total sample, n=1,000 – each shown to ½ split sample

Britons much less favourable to oil sector, with BP and Shell getting the the most negative rating

Feelings toward oil and gas companies

- 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=1,000; some shown to ½ sample

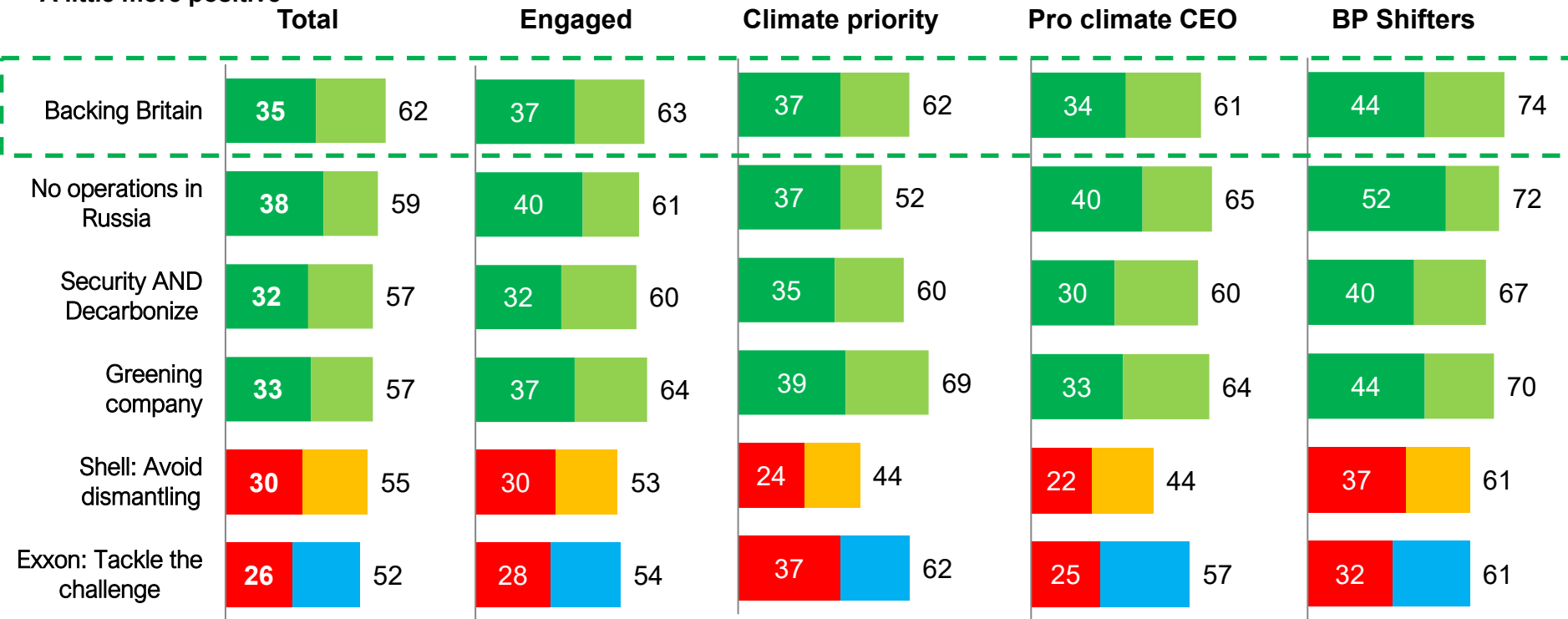
BP and other oil companies' policy changes and positioning tested in this poll

BP is backing Britain	BP is backing Britain by paying over £1.25 billion in tax this year, including the recent additional taxes applied by the government. BP is also investing up to £18 billion updating the UK's energy system by the end of 2030, and is doing yet more to support the economy, develop people's skills, and create jobs in communities where it operates.
No operations in Russia	For the last twenty years, BP was invested in Russia with a nineteen percent share in Rosneft - a company with close ties to the Russian government. Virtually all other major oil companies were exploring and operating there too. In March 2022, BP decided it could not operate there transparently and has taken a \$25 billion write down of its assets as result. BP is the only major oil company with no operations in Russia.
Security AND Decarbonise	BP says the world is demanding a balanced energy system that is more secure, more affordable, and more green. This means both increased investment in lower carbon solutions to help society decarbonise faster AND continued investment in hydrocarbons to keep energy flowing, and to ensure energy security and affordability. Our ultimate destination remains unchanged: to be carbon neutral by 2050 or sooner across all operations, production, and sales.
BP is a 'greening company'	BP respects "green companies" that play a critical role in creating new technology, but we only succeed in beating the climate emergency if the companies with a big carbon footprint - like oil and gas companies, airplane manufacturers, and steel companies become dramatically greener in their operations. BP is a 'greening company' that has announced plans to cut its oil and gas production by 40 percent and a 20-fold increase in renewable energy within a decade.
Avoid dismantling the system	Shell says that oil and gas will continue to play a crucial role in the energy system for a long time to come, with demand reducing gradually over time. While continued investment in oil and gas is critical, the destination of a net zero emissions energy system remains the goal. Shell believes it is critical the world avoids dismantling the current energy system faster than we can build the clean energy system of the future
Determined to tackle challenge	ExxonMobil is determined to tackle head-on the challenge of strengthening energy supply security and reducing emissions to support a net-zero future all while growing value for their shareholders. Exxon intends to invest billions on lower-emission initiatives between now and 2027, have deployed new technologies to reduce methane emissions, and are continuing to make progress towards their 2030 greenhouse gas emissions-reduction plans

No Russia operations strongest across targets; Backing Britain does well, though about 7-8 points weaker on intensity. The Shell and Exxon pulling back score much weaker

Reaction to BP policies and positioning, by target

■ Much/Somewhat more positive
 ■ A little more positive



Here are some steps that major companies are taking to respond to climate change. After each statement, please rate whether it makes you more, or less positive toward the company.

Total, n=1,000; Engaged, n=656; Climate priority, n=217; Pro Climate CEOs, n=344, BP Shifters, n=519

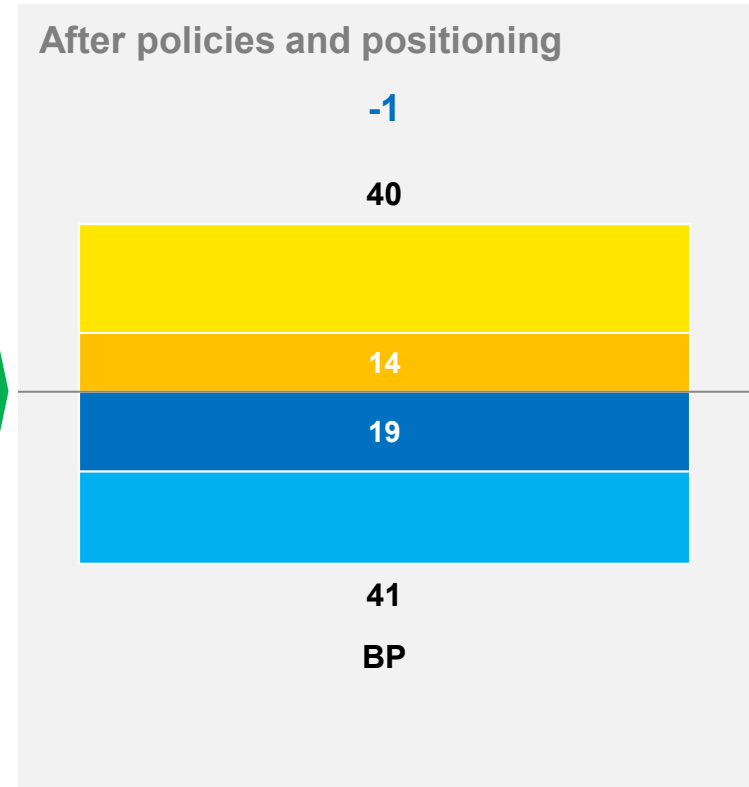
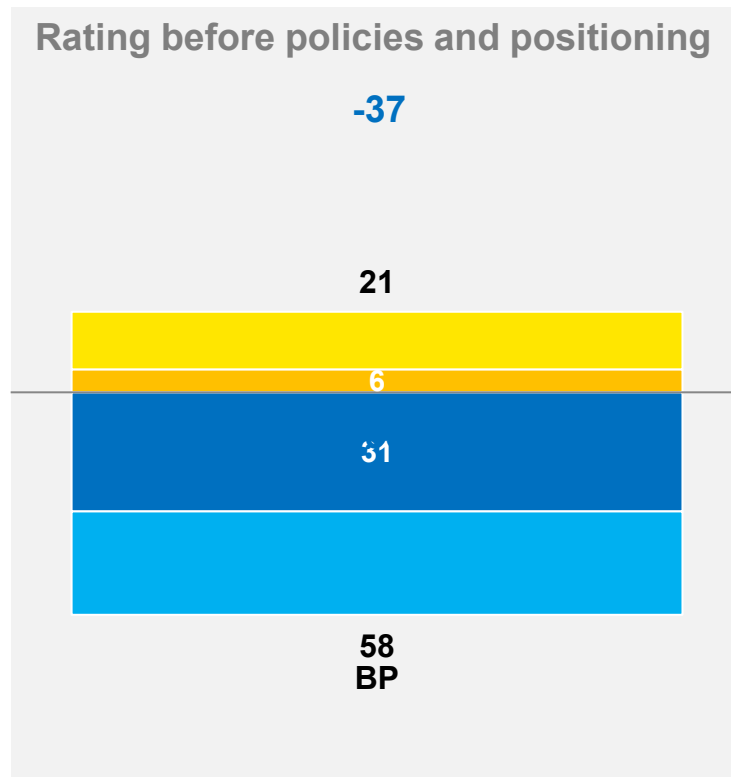
Messaging dramatically improves favourability of BP

Feelings toward businesses and corporations, total sample

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

Warm, favorable feelings ↑

Cool, unfavorable feelings ↓

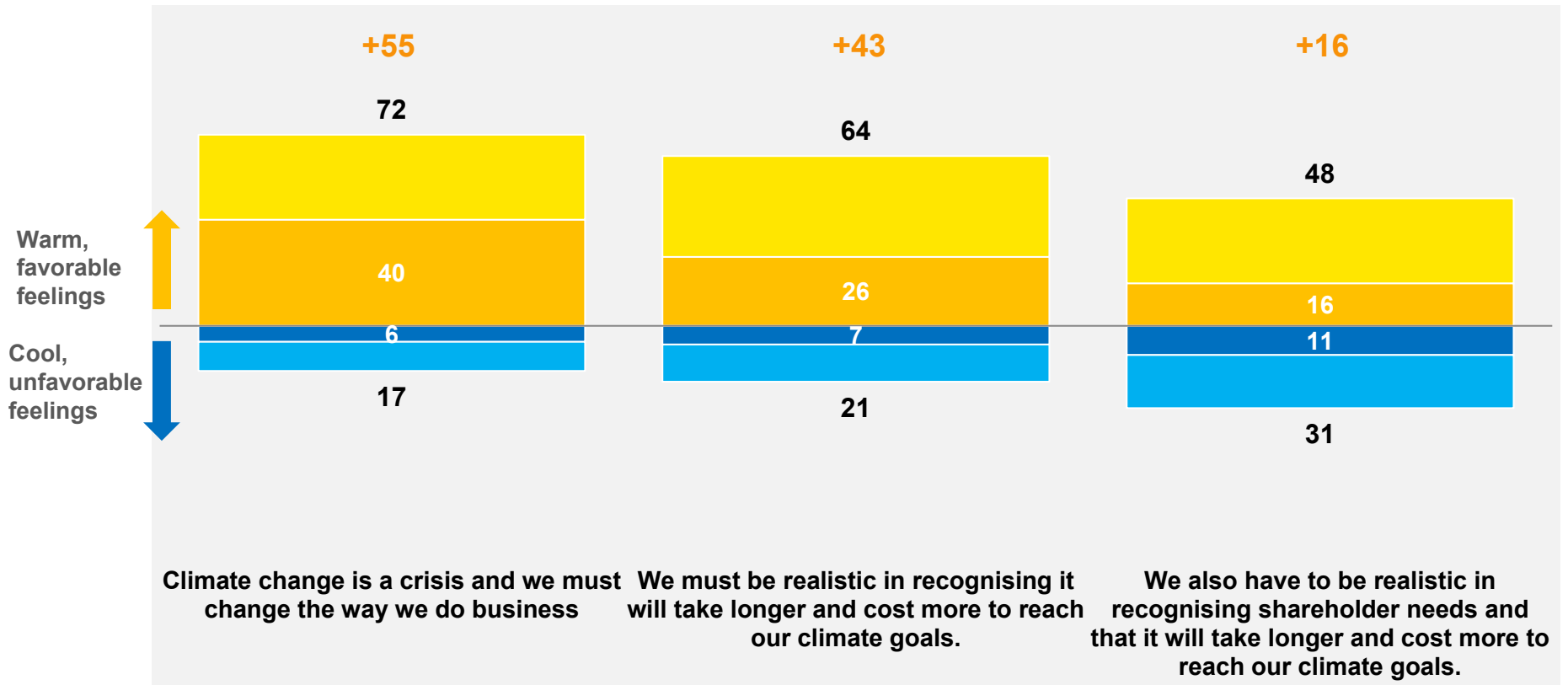


Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.

Employees react favourably to employer saying, climate change a crisis, but warmth drops 14 points with adjusting for realism and 8 more points for shareholders

Feelings toward employer, total sample

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

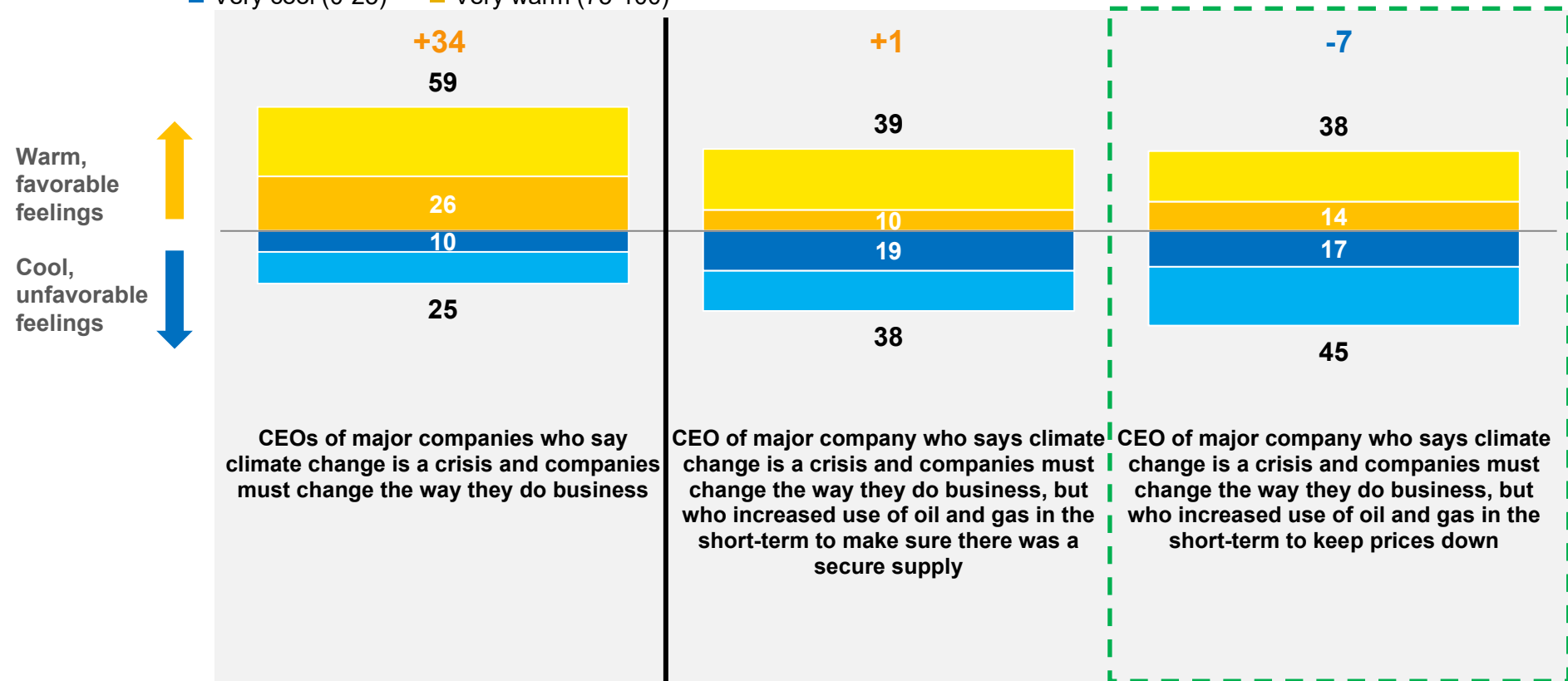


Imagine your employer said the following. Please rate your feelings toward your employer if they said the following, with 100 meaning a very warm FAVOURABLE feeling; 0 meaning a very cold, UNFAVOURABLE feeling; and 50 meaning not particularly warm or cold.

Pro-Climate CEO in UK loses standing when mentioning any increase in oil and gas use

Feelings toward BP messaging, total sample

- 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.

CLIMATE
Policy & Strategy

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

