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The impact of environmental policy on policy platforms

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Public First

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Contents

Introduction

Executive Summary

This research paper demonstrates the impact of environmental policy on policy platforms. A core part of the research makes use of a question in which participants of a 2,000 sample poll are presented with randomised policy platforms, with some environmental and non-environmental policies, and asked to evaluate these platforms in a number of ways. We find:

- **Investment in renewable energy consistently positively impacts a policy platform**, and ranks among the most popular policy options we tested. Taxes on the highest polluters similarly performed well, and tended to increase the likelihood that someone would support a policy platform.
- **Delays to Net Zero, and increased oil & gas drilling in the North Sea tend to have the opposite impact**, and reduce the support levels for policy platforms.
- **These effects were additional to the impacts of other popular policies**, such as policies on the NHS and minimum wage. Policy platforms which included unpopular policies, would become considerably more popular if the green policies were included alongside them.
- **The positive impacts of environmental policy (and negative impacts of non-environmental policy) go beyond simple support and opposition**, increasing the chances that a party is seen to care about future generations, be acting sensibly, and be long-sighted.
- **There is an asymmetry on environmental policies. Those inclined to oppose an anti-Net Zero policy swing heavily against a party if it stands on anti-Net Zero policy, while those who support anti-Net Zero policy do not swing as heavily in favour of it.** The risk to parties is that voters "rule them out" for anti-environmental policy, while it does not turn many voters who support these policies into "definite voters". On the flip side, among those who support environmental policy, the inclusion of these policies in a platform has a clear positive impact, while not having a substantial negative impact on those opposed.
- **We find that putting "anti-environmental policy", such as Net Zero delays and oil & gas drilling, into policy platforms increases the chances that they are perceived to be Conservative party platforms.** These two policies were both unpopular, and felt to be policies of the Conservative party, indicating that the environment is a key way in which the Conservatives are felt to be out of step with the public in general.
- **The negative impact of these policies is somewhat softened among key swing voters**, but still exists, as do the risks to the party brand.
- **Rishi Sunak's announcement on environmental targets was broadly supported**, as it was felt to have been undeliverable given the cost of EVs, but it had the negative impact of making people less likely to believe that the Government would hold future promises. A key reason the pledge was felt to have been dropped was because Rishi Sunak could not deliver it.
- **Overall, the impact of this policy change was relatively neutral**, although it does appear to have hardened opinion against the Conservatives among voters who have moved from Conservative in 2019 to saying they would vote Labour now.
- **Support for the Net Zero target of 2050 remains in the majority**, among Conservative and Labour voters alike.

Motivations for the research

Environment policy faces a number of challenges when it comes to opinion research. Specifically:

- When presented in isolation, pro-environmental policy tends to see high levels of support. However, when people prioritise the areas they wish to see Government action in, it tends to fall behind other issues.
- The impact of climate policy is harder to predict when it is part of a larger platform. Does it have an effect on how well received a platform is, or does all attention go to the policies on the economy and NHS which are issues of higher priority to the public.

In the context of PM Rishi Sunak's announcement on delaying some environmental targets, which places a bit of distance between the Conservatives and Labour on the climate, we were interested in trying to test the impact of environmental policies when alongside other commitments.

Methodology

Questionnaire Design

To understand how environmental policy (and the opposite) impact the perceptions of political parties, we designed a question which would place randomly selected environmental policies *in situ* with other policies.

We produced a list of 21 policies (Table 1), of which 6 were related to the environment, and 15 ranged across 5 other issues. These policies were designed to avoid mutual exclusivity, meaning that when 3 were selected fully at random the policy platform this created would not be in conflict with itself, and was at least a plausible platform for a party to adopt.

Table 1: Full list of policies tested

NHS	Increase wages for NHS staff	Build a number of new hospitals across the UK	Cut down on the number of managers in the NHS
Economy	Increase the minimum wage	Invest more into research and development	Reduce taxes on businesses
Tax/Welfare	Increase taxes on the highest earners	Increase pensions to help the elderly	Make jobless benefits conditional on paying in to the system over a set period of time
Energy	Increase investment in renewable energy sources like wind and solar in the UK	Increase investment in nuclear energy in the UK	Allow oil and gas drilling in the North Sea to produce more domestic energy
Immigration	Introduce systems to help new migrants into work	Put more money into processing asylum seekers	Reduce the number of migrants crossing the channel in boats
Net Zero / Who pay	Introduce new taxes on the largest polluters in the UK to encourage them to reduce their emissions	Increase government spending on initiatives to reduce carbon emissions in the UK	Delay the UK target to reach Net Zero by 2050
Social	Ensure every school has education on LGBT+ issues	Introduce schemes to help more women into senior business roles	Require buildings to have single-sex spaces

These policies were displayed in groups of 3 to respondents. Each respondent was shown 7 “political parties”, meaning that every individual policy was seen by the full sample once.

After seeing the policy platform, participants were asked a range of questions about the platform, from how likely they would be to vote for a party with the platform, to views on whether it was patriotic or not and whether it looked like a Conservative or Labour platform.

Sampling

The sample was 2,040 UK adults aged 18 and over. Respondents were recruited online, and the survey was designed to work for both mobile and desktop. Responses were collected between September 27th and September 29th 2023. Quotas were put in place to ensure representation on key demographic subgroups, namely age, gender, region and social grade. For the purposes of analysis, these results were weighted, and where weighted results are used through this report we note this.

Part 1: Impact of environmental policy on policy platforms

General support and prioritisation of environmental policy

In order to get an initial indication of the support and prioritisation of environmental policy, we asked standard questions about all the policies we tested. This included a straight question of support and opposition to each policy, a question in which participants were required to select exactly 5 policies they would prioritise and, as a follow up, 5 policies they would place least priority on.

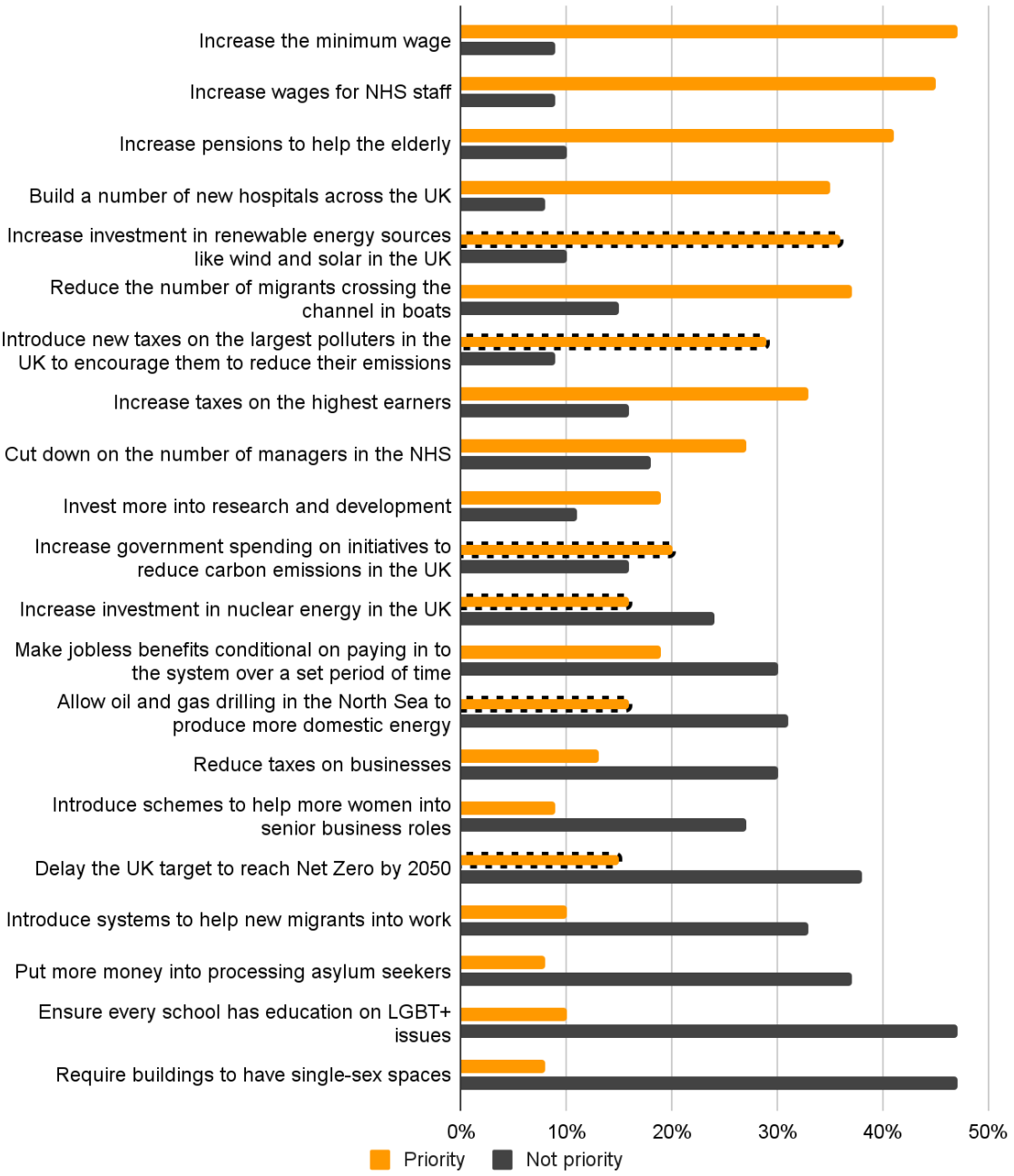
Policy Support and Prioritisation

With a standard measure of support and opposition, nearly all the policies see relatively high levels of support. More detailed research into policies like this are more revealing when it comes to the strength (and fragility) of this support.

When we look instead at prioritisation levels the story is slightly different (Chart 1). For these scores, we asked respondents to select their top 5 policies from the list, and their bottom 5 policies from the remaining options. A policy option can plausibly be highly supported, but not highly prioritised.

In this context we find that carbon reducing measures, and in particular investment in renewables and taxes on the biggest polluters, see high levels of prioritisation among the list we tested. Notably, delaying Net Zero and North Sea drilling show particularly low prioritisation.

Chart 1: Prioritisation and "de-prioritisation" of all policies presented (weighted, environmental and anti-environmental policies highlighted)



These top-level results are promising for carbon reducing measures, which come out both well-supported and highly prioritised among the options we test. However, we wanted to understand better the impact of having a pro-environmental policy alongside other policies, by which we mean in the same policy platform. In order to do this, we used a more experimental design, wherein policy platforms were constructed randomly, in order to understand how each policy shifted attitudes.

Impact on the electability and alignment of policy platforms

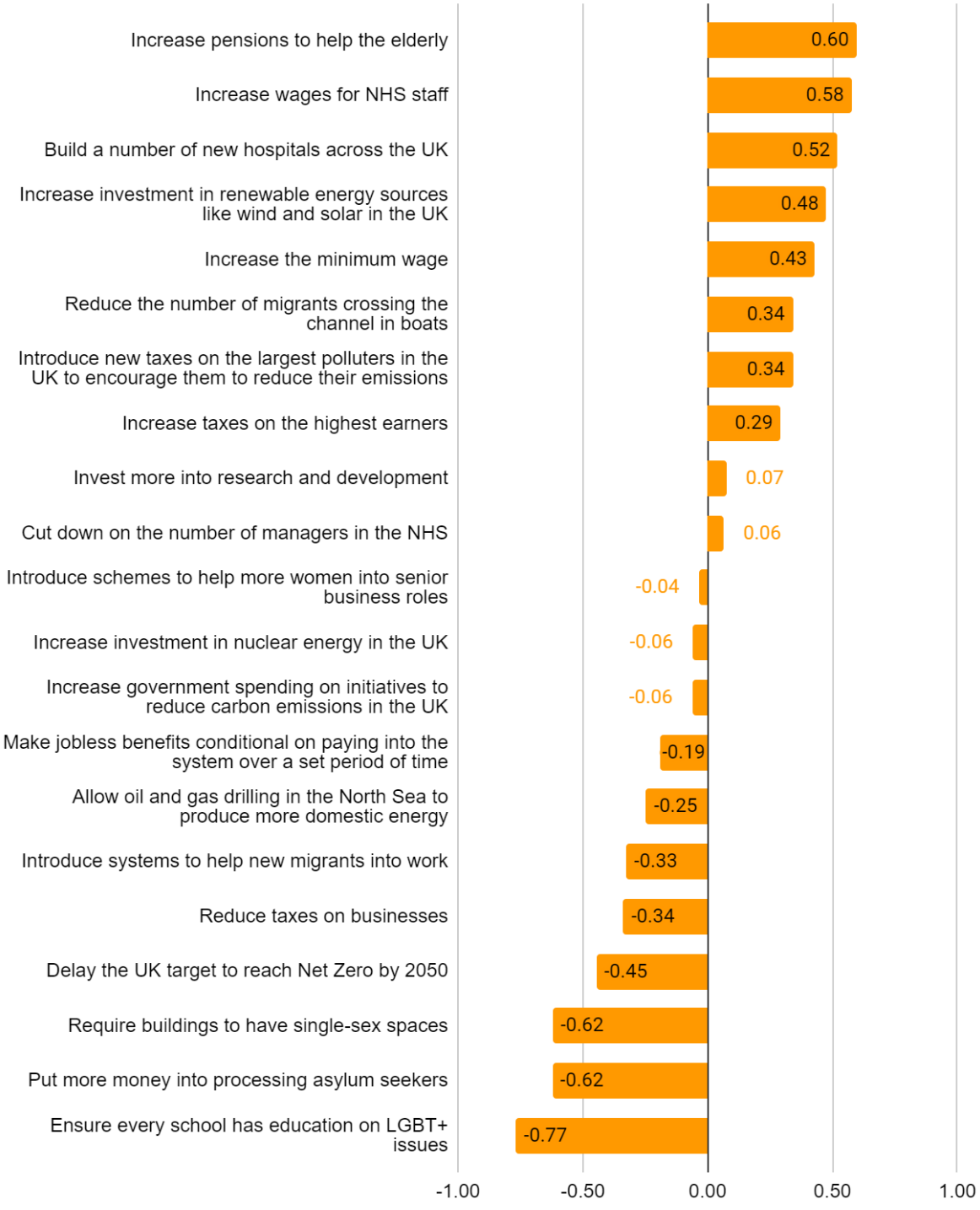
We presented the policies in groups of three, followed by a number of questions directed at the combination of three policies. We go into particular detail on the first question asked, which focussed on how likely a participant would be to vote for the policy platform they were presented with. This functioned both as the initial indicator of sentiment that participants held towards the platform, as well as a broad proxy for how well supported the hypothetical policy platform was.

Policy impact on party support

On average, participants' likelihood of voting for the hypothetical policy platforms was 5.43/10. The policies presented had a significant impact on this likelihood, with support for the best performing platform reaching 6.03/10, and for the worst performing 4.66/10. These changes may seem small in magnitude, but opinion data is noisy and these averages span across people from every political leaning. To put it into context, a policy platform including a pledge to increase pensions to help the elderly (the best performing) would see 47% of people 7+/10 likely to vote for it and 12% 2-/10 likely to do so. On the other end of the scale, a platform with a pledge for universal LGBT+ education in schools would see 29% 7+/10 likely, and 26% 2-/10 likely.

The top 5 policies that shifted support up, by over 0.4/10 points each, were pension increases, NHS wage increases, building new hospital beds, investing in renewable energy and increasing the minimum wage. The worst performing policies, which shifted likelihood to vote down by at least 0.33/10, were ensuring LGBT+ education in schools, putting more money into processing asylum seekers, requiring single-sex spaces in buildings, delaying the Net Zero target and reducing taxes on businesses (Chart 2).

Chart 2: Gain in support for platforms including these policies (unweighted average score on a 0-10 scale for likelihood to vote for the party)



With this analysis, we can see that the environmental policies which were supported in isolation, also perform well in the context of a wider policy platform. For example, investment in renewable energy sources is shifting electability of a policy platform up as strongly as increases to the minimum wage and hospital building.

However, government spending on initiatives to reduce carbon emissions performs less well, not shifting electability of a platform much from the overall average.

These differences do appear small, although it is worth remembering that:

- Each policy was presented alongside 2 other policies, which naturally reduces the impact a single policy would have.
- These results are averaged across the whole sample, ranging from strong Conservatives to strong Labour voters. Later, when we examine swing voters' views, the impact of specific policies will be larger (albeit with greater margin of error due to sample size).

To give a sense of the scale of difference here, we can compare the renewable energy and delay Net Zero policies. Platforms that included the former received electability scores of 7+/10 46% of the time. For the latter, this was just 33% of the time. On the flip-side, ratings of 2-/10, effectively ruling out voting, were received for renewable investing platforms 13% of the time, but for Net Zero delays 22% of the time.

Environmental policies are contributory

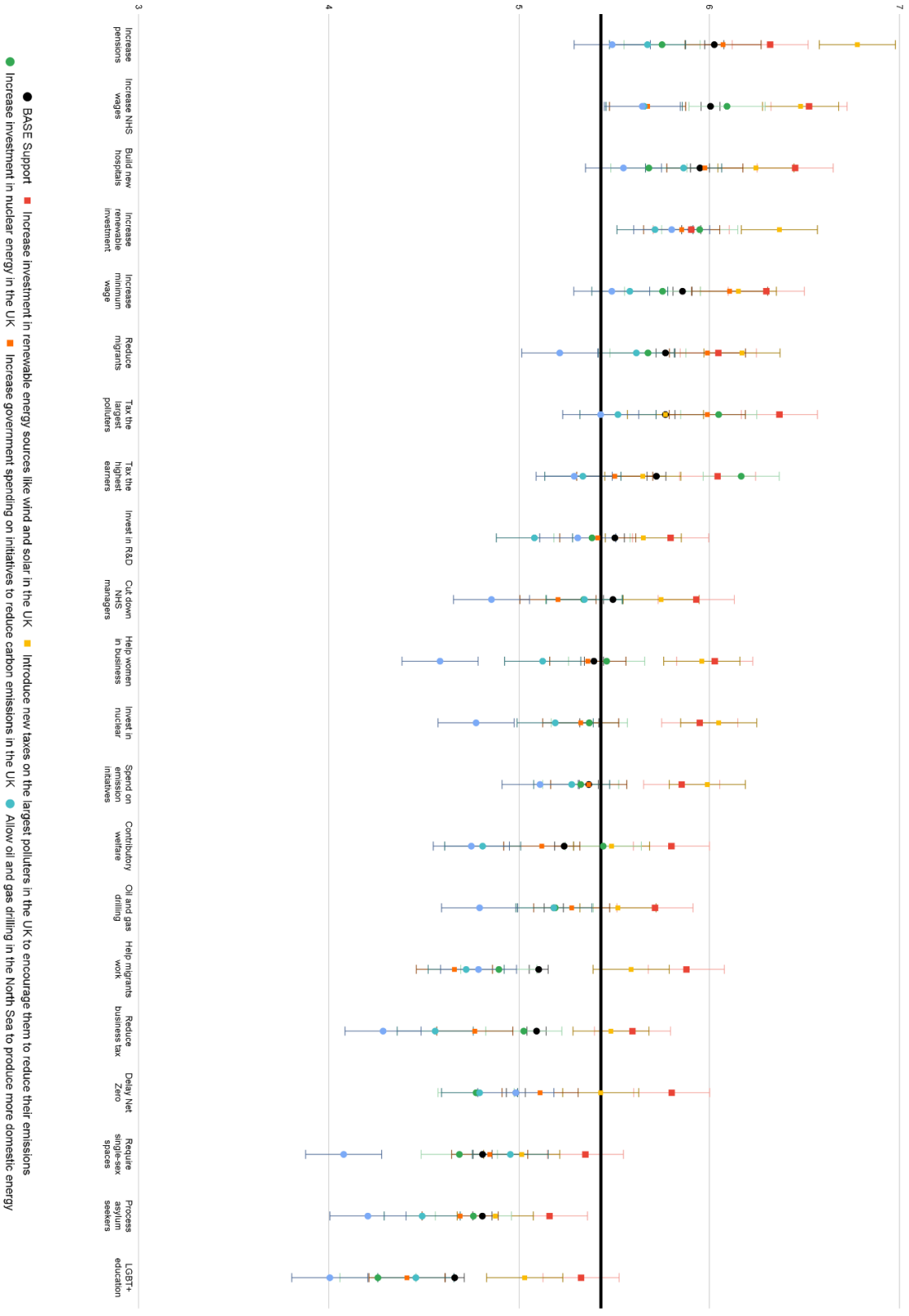
We can look at the impact environmental policies have when put alongside other policies from the list. For every possible pair of policies, around 200 respondents would have evaluated that pair at some point during the exercise, meaning we have the granularity to explore how they interact. This analysis goes some way to demonstrating the power of environmental policy, at least at a sample-wide level.

Our research indicates that the impact of multiple environmental policies was positive (Chart 3). In Chart 3 the red and yellow plots represent carbon reducing measures, and the blue and turquoise plots carbon increasing measures, and you can see the respective positive and negative impact of including these alongside other policies (represented in black) across the board.

For example, the support for increased renewable investment on its own averaged 5.9/10, and for taxes on the largest polluters averaged 5.77/10, but for a policy platform containing both of these it averaged 6.37/10. 53% said they were 7+/10 likely to vote for a platform which included both these policies, and only 11% were 2-/10 likely. Similarly the policy suggestion to increase government spending on carbon reducing initiatives was middling on its own, but when combined with either of the above saw considerably more support as a platform (5.85 with renewable investment, 5.99 with taxes on polluters).

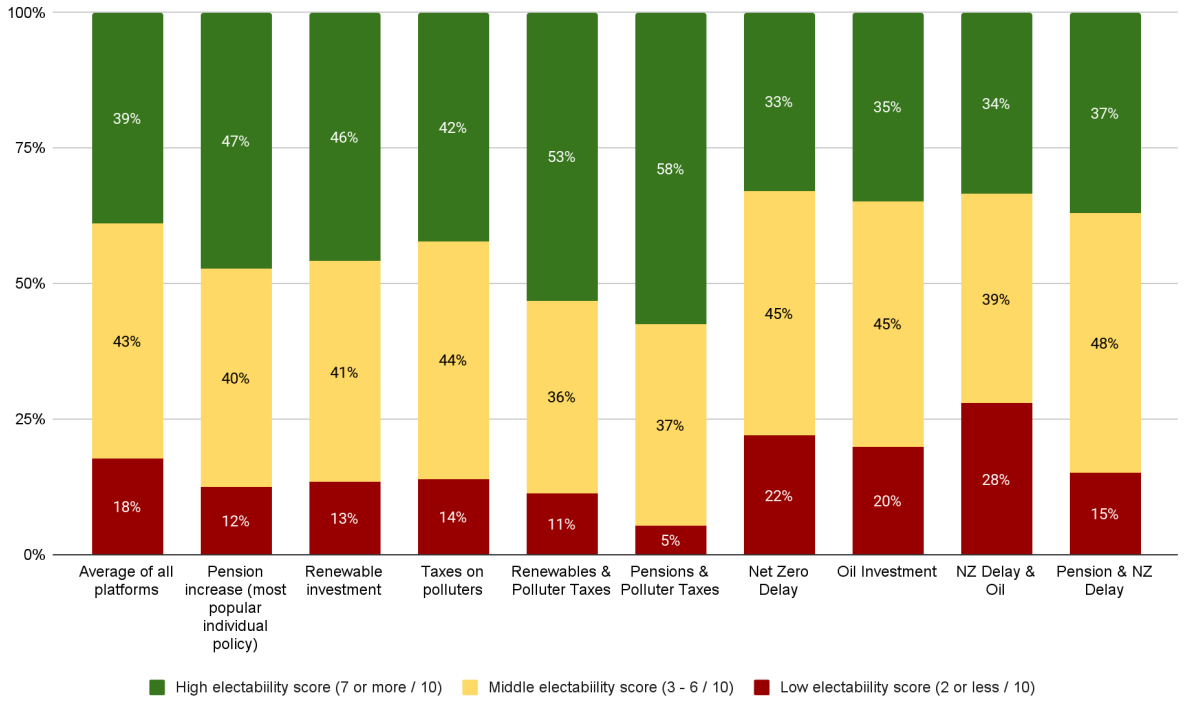
Further, this analysis demonstrates the damage that a delay to Net Zero has on otherwise well-supported policy platforms. For example, a party pledging to increase pensions to help the elderly loses practically all of its electoral support by also pledging to delay Net Zero. On the other hand, if the party proposed introducing new taxes on the biggest polluters, it would have among the most popular policy platforms we tested, averaging 6.78/10 on likelihood to vote across the public, with 58% saying they were 7+/10 likely to vote for this party.

Chart 3: Change in electability of party platforms containing each policy when combined with key environmental policies (unweighted)



In Chart 4 we compare the split of electability scores for platforms with various policies and combinations of policies.

Chart 4: Change in electability scores in hypothetical party platforms containing one or two key policies (unweighted)



Impact on policy platforms outside of electoral support

Impact on party brand

To further explore the impact of adopting climate policy on political parties, we asked participants a range of questions about their perceptions of each of the hypothetical platforms.

Firstly, we examined whether environmental policies had any impact on their perceptions of the parties as "high tax" or "low tax". The majority of policy platforms we presented were felt to be "high tax" in general, with the only exception being the policy platforms that directly proposed reducing taxes on businesses. Environmental policies did not shift the dial much on this measure. Interestingly, the proposal to introduce new taxes on the highest polluters only slightly increased the perception of a "high tax" party.

Partly as a sense-check, we asked if the parties were seen to be pro- or anti-environment and, as we would expect, the scores varied heavily depending on the inclusion of the environmental policies. Notably, including nuclear investment did not shift the scores nearly as strongly as renewable investment towards "pro-environment".

Environmental policies did not shift the dial much on perceptions of parties as "patriotic" or "extreme". Increasing investment into renewables did have a small but significant impact on the perception of a party as "moderate".

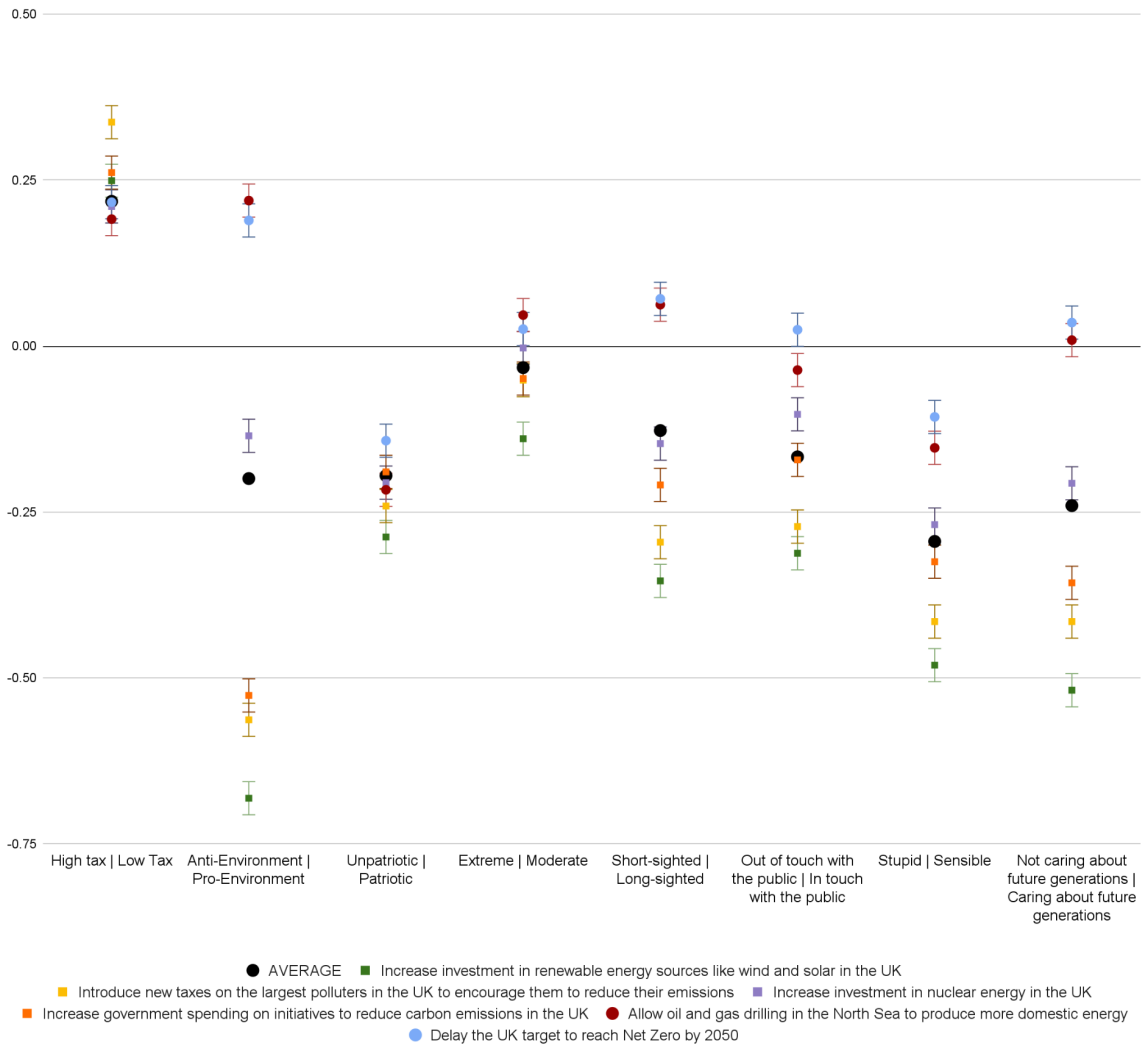
We saw a much more pronounced impact from environmental policy on the perceptions of a party as long- or short-sighted. While on average across all of the policy platforms tested, perceptions would tend to lean towards them being "long-sighted", when a policy platform included either oil and gas drilling or Net Zero delays, assessments of the platform instead leaned towards suggesting it was "short-sighted". Alongside ensuring LGBT+ education, these two policies were the only ones that shifted average perceptions of platforms into the "short-sighted" category.

Furthering this, we found that oil and gas drilling and Net Zero delay had a significant impact on the perception of a policy platform as "caring about future generations". By a considerable distance, platforms that included investment in renewables were much more likely to be felt to be platforms that cared about future generations. On the other hand, platforms that delayed Net Zero were the only ones which held an average score of "not caring about future generations", although it was a very slim one. In short, delays to Net Zero hold quite substantial risks when it comes to perceptions of a party as caring about the future.

Finally, we find similar trends in perceptions of policy platforms as stupid vs. sensible, and in touch vs. out of touch with the public. For both these, the anti-environment pledges tended to lean scores towards the negative, and the pro-environment ones to the positive.

Chart 5: Change in various measures of party "brand" when including environmental policy among the platforms (unweighted)

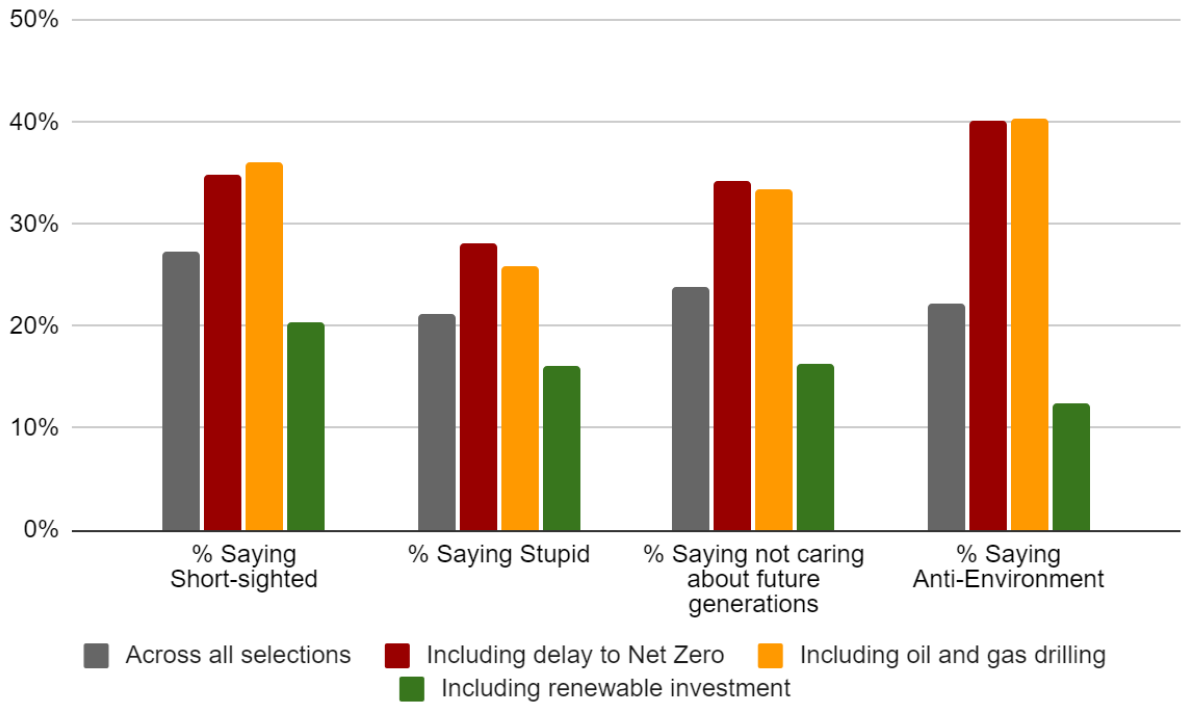
Interpreting this chart: The chart indicates relative scores of policy platforms which include each environment-related policy, with scores above the 0 horizontal line indicating a lean towards the top statement, and below the line a lean towards the bottom statement. In other words, on the pro- vs. anti-Environment option we can see that the oil drilling and Net Zero Delay make the policy platform "Anti-Environment". The average score (i.e.. The score across all tested policy platforms and combinations) is indicated by the black dot, so we can see that most of the policy platforms tested were seen to be high-tax, sensible, caring for future generations, and pro-environment.



To make the impact of these policies clear, we can compare the proportions who estimate that a policy platform is short-sighted, stupid, anti-environment and not caring about future generations (Chart 6). For example, when a policy platform includes the pledge to delay Net Zero from 2050, we can see that 35% say that the platform as a whole is short-sighted, around as many as say it is "long-sighted" (33%). This is a substantial difference when we consider that across all policy platforms tested, participants tended to see them as long-sighted (39% to 27%). The difference is more pronounced on whether a policy platform is perceived as

caring about future generations or not. While the average platform sees 44% to 24% believing it displays care for future generations, platforms which propose a delay to Net Zero tie with 34% saying they display care and 34% saying they do not.

Chart 6: Impact of proportion evaluating a policy platform as short-sighted, stupid, anti-environment and not caring about future generations, split by whether key environmental pledges were included (weighted)



On the other hand, a policy platform which includes renewables investment falls heavily in the opposite direction, with an outright majority of platforms which include this pledge being perceived to care about future generations (56%). In fact this policy was the best of the policies tested at giving the impression of a policy platform as being caring for future generations. The delay to the Net Zero target, on the other hand, was among the most effective ways to make a policy platform seem uncaring for future generations.

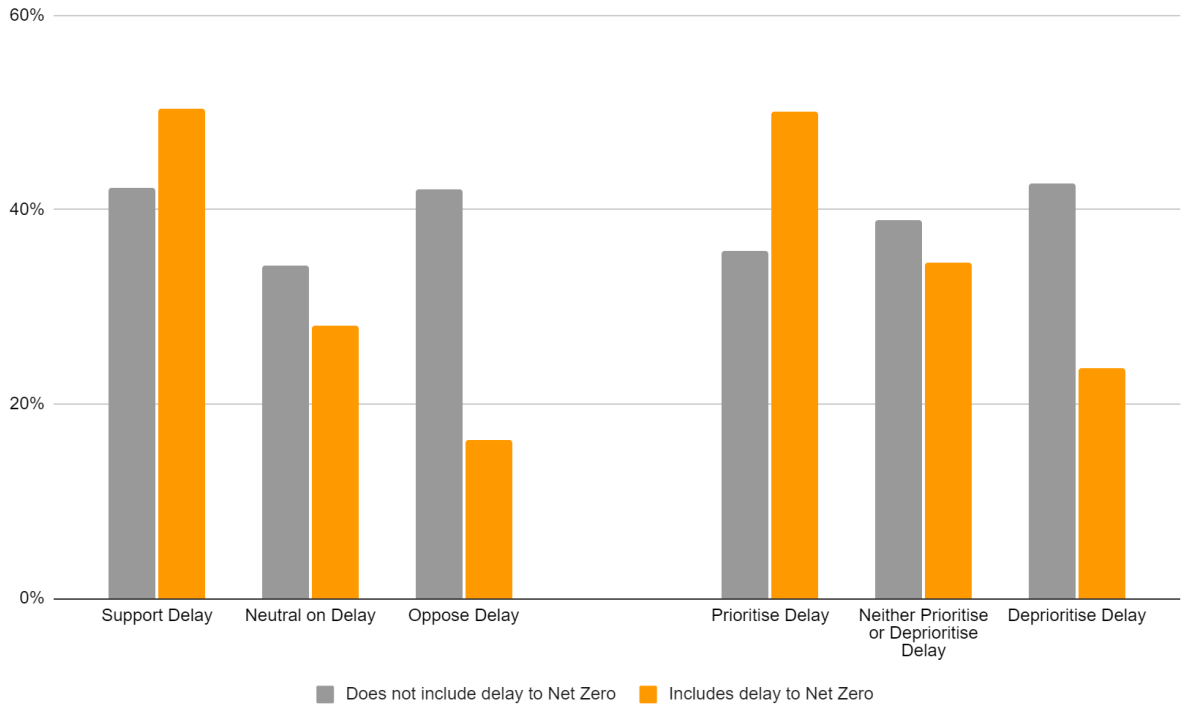
Many of these options follow somewhat predictable patterns, wherein the negative statement (be it stupid, short-sighted, not caring about future generations) is more strongly associated with anti-Environmental policy. The results indicate the widespread risks of taking stances against the environment, going beyond just the electoral risks. As before these changes in scores are small when viewed on an aggregate level and masked by other policy positions, but nonetheless climate policy does clearly cut-through the noise and have a notable impact on the way parties are perceived.

Impact among policy supporters and opposers

We can look in more detail at how the inclusion of various policies in a policy platform impacts those who express support, or indeed prioritisation, for those policies in a more direct

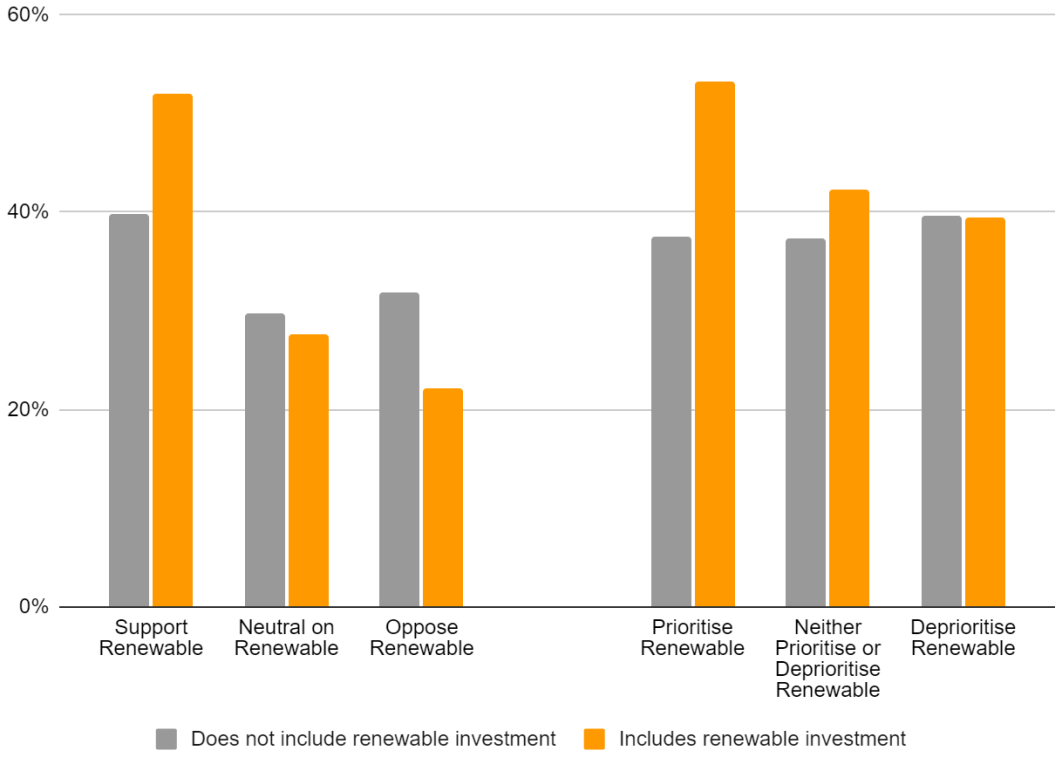
context-less question. When we compare the impact of including a delay to Net Zero in the policy platform on those who state that they support and oppose a delay to Net Zero when asked in isolation, we can see that it tends to have a small positive impact for supporters but a substantial negative impact for those who oppose (Chart 7).

Chart 7: Change in proportion who say they are 7+/10 likely to support a policy platform including a delay to Net Zero, split by whether they later support or prioritise the delay in isolation (weighted)



We see a slightly more pronounced increase in support for those who prioritised a delay to Net Zero, although it is worth remembering that this was a smaller group in the sample. Performing the same analysis on commitments to invest in renewables, we find that it has a strong impact on the support for a platform among those who support the policy, and among those who prioritise it. Again, the groups in opposition or deprioritising this policy were small, but we find it has an impact on the opposition group but not the deprioritising group (Chart 8).

Chart 8: Change in proportion who say they are 7+/10 likely to support a policy platform including investment in renewables, split by whether they later support or prioritise the investment in isolation (weighted)



Our results indicate that while delays to Net Zero have the potential to heavily reduce popular support for a party among those who oppose the policy, it does not increase popular support as much among those who support the delay in isolation. On the other hand, commitments to renewables does have a strong impact on support for a platform, indicating that this top-level support is not "hollow" and does indeed shift views when presented in the context of other policies. Equally, the small group opposed to renewable investment is not put off from voting for a party nearly as much as those opposed to delays, and it has no impact at all on those who believe renewables are not a priority. In short, our results suggest that taking an "anti-environmental" stance is lethal among the large group opposed to these stances, without winning over enough support from those in support to make up for it. Investment in renewables, on the other hand, is not lethal to a policy platform among its opposition.

Anti-Environmental policy is seen to be more Conservative

One key finding of this survey design is that the policy platforms containing "anti-Environment" policies were some of the most likely to be seen as Conservative party platforms. Across all trials, 23% of platforms were felt to be Conservative, 26% Labour, while 13% were felt to be neither, 19% plausibly either and 18% were unsure.

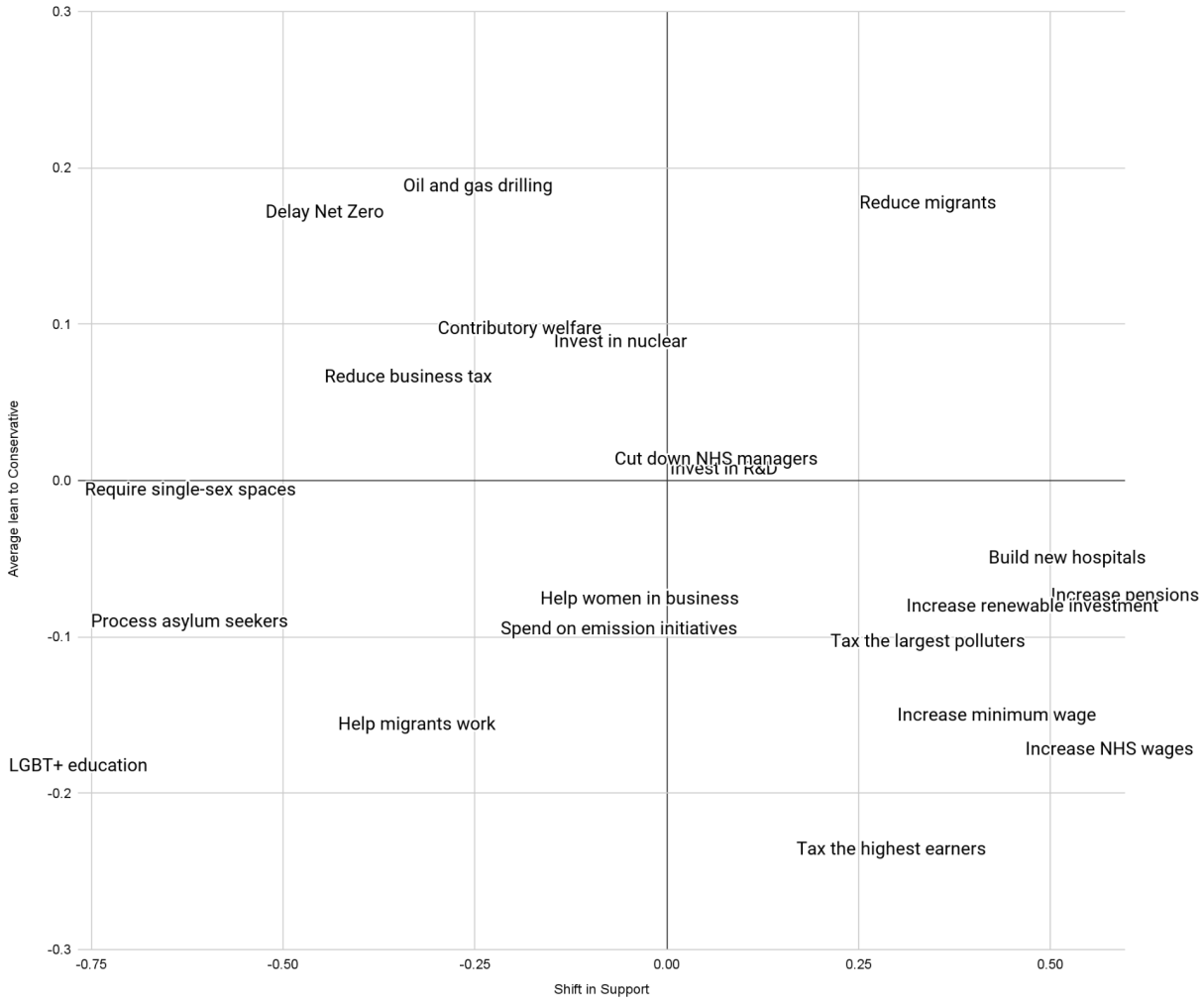
However, when a policy platform contained a delay to the Net Zero target, 35% felt that this was likely to be a Conservative party platform, and only 17% Labour. Similarly, when a platform including oil and gas drilling in the North Sea, 35% felt it was Conservative and 16% Labour. Notably this does not just seem to be an effect of Labour's voters distancing themselves from the anti-environment policy by saying it feels Conservative. For one, 41% of those who voted Conservative in 2019 say that a delayed Net Zero platform looks more like a Conservative platform, compared to 34% who voted Labour in 2019.

Across the whole of the sample, the only policy which when put in a hypothetical policy platform had the impact of both increasing support for the platform and making it look more like a Conservative platform than a Labour platform, was reducing the number of migrants. Unpopular policies perceived to be Conservative were delaying Net Zero, Oil and gas drilling, and to a lesser extent reducing business taxes and contributory welfare. Popular Labour-aligned policy was easier to find, including taxes on the highest earners, increased NHS wages, and increasing the minimum wage. Unpopular Labour policies were LGBT+ education, helping migrants into work, and spending more to process asylum seekers.

In fact, we find a significant correlation ($r=0.16$, $p<0.0001$) between assessments of policy platforms as "anti-Environment" rather than "pro-Environment" and assessments of policy platforms as looking more like Conservative party platforms. This was the strongest correlation found between the assessments of platforms and partisanship, followed by a positive correlation between platforms which were assessed as "not caring about future generations" and as Conservative platforms ($r=0.11$, $p<0.0001$).

Our results indicate that "anti-environment" policy, and particularly delaying Net Zero, are the least popular policies which are seen to be aligned with the Conservative party as it stands. If immigration policy presents the biggest electoral risk to Labour, being seen as "on-brand" and unpopular, environmental policy does the same for the Conservative party.

Chart 9: Plot of policies which shifted electability of a platform up (x-axis) and shifted perception of a platform towards being a Conservative platform (y-axis), (unweighted)
Interpreting this chart: Policies above the horizontal x-axis tend to be seen as Conservative. In other words, when we ask people to say whether the policy platform including this policy is a Conservative or Labour platform, if they include the policies above the horizontal line they tend to be seen as Conservative. On the other hand, policies to the right of the vertical y-axis tend to have a positive impact on the likelihood of the platform being voted for, and to the left of it a negative impact. As such, the top right quadrant contains popular "Conservative" appearing policies, the top left unpopular "Conservative" appearing policies.



However, it is important to note that the above is all calculated from the sample-wide data, including a substantial number of voters who now intend to vote Labour. In order to better understand the electoral significance, we should explore the "swing voters".

Understanding key swing voters

Who are the swing voters in September 2023

At the time of our poll, Labour has held a consistent double-digit lead in vote intention polls for over a year. In this context, identifying "swing voters" can be challenging. This is because "swing voters" are starting to look a lot like just "Labour voters" at this stage; they say they will vote Labour, and they often support Labour across a number of the questions asked. This is not to say that swing voters do not exist, but that a slightly different interpretation would help to identify them. It can be more insightful to differentiate between the group that has already "swung" and that which is to a greater or lesser extent likely to "swing".

For the purposes of this analysis, we consider these voters to be those who voted Conservative in 2019, but now place their likelihood of considering a Labour vote at 5+/10. As it stands, the Conservative party is holding onto just 55% of their 2019 voter base in the vote intention question, while Labour holds 85% of their own. 12% of the Conservatives 2019 voters have already shifted their vote intention over to Labour, with a further third (33%) falling into this category we define as swing voters. This is quite a small group (246 of our sample), but a significant one when it comes to understanding why Labour holds the lead it does in the polls.

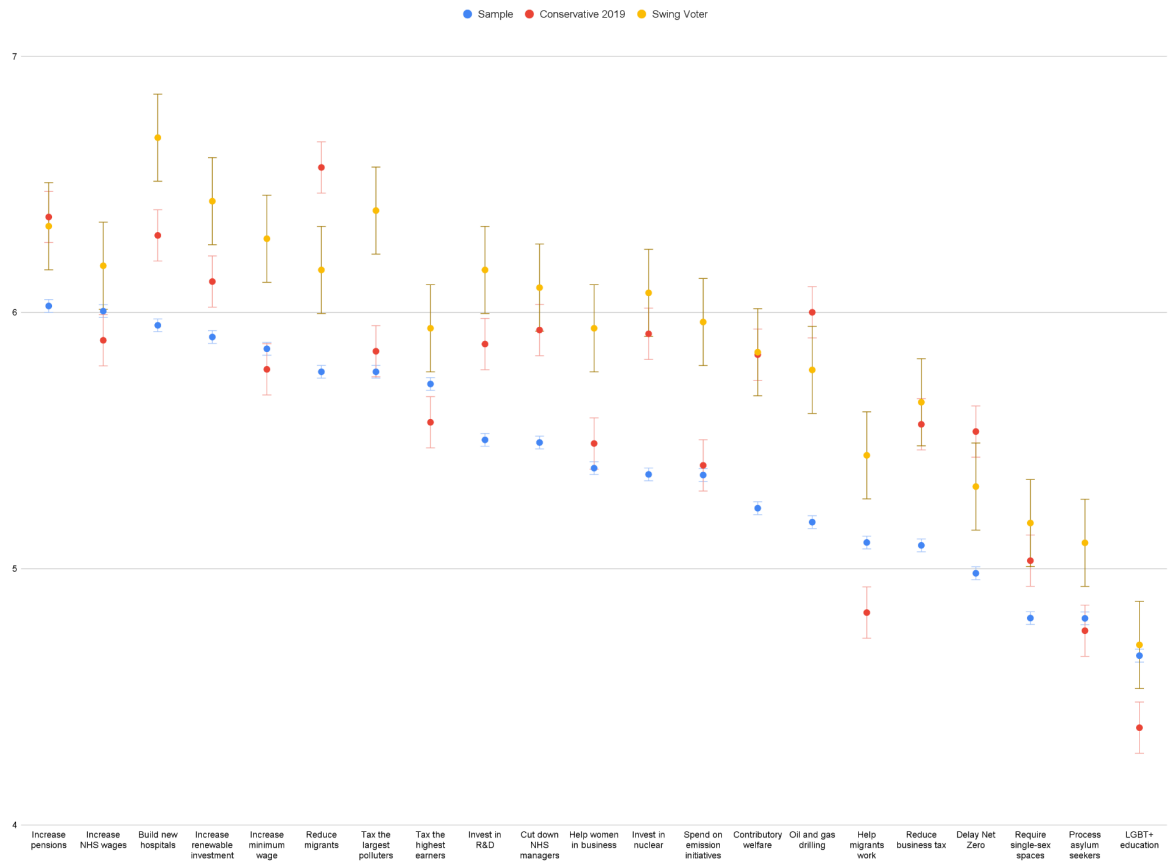
Despite expressing 5+/10 likelihood to vote Labour, these swing voters still favour Conservatives in the direct vote intention question, with 40% indicating this as their intended vote compared to 35% for Labour. If these swing voters were to break fully for Labour, Conservatives face a wipe-out in 2024, winning just 21% of the vote to Labour's 52%. If, however, these voters were to fall back into voting Conservative, they draw near-level with Labour, winning 35% of the vote to Labour's 37%. Here we explore the attitudes of this group when it comes to environmental policy.

Swing voter attitude to environmental policies

These voters were more likely to say they would vote for the platforms we presented in general, averaging a score of 5.89 compared to the sample-wide 5.43. Overall, we find some notable differences in the power of different policies for these swing voters when compared to the sample as a whole, and when compared to 2019 Conservatives as a whole (note that the swing voters themselves are included within both these groups).

One of the notable differences was that taxes on the largest polluters would shift the electability rating of a platform up as much as increasing pensions and renewable investment for the swing voter group (Chart 10).

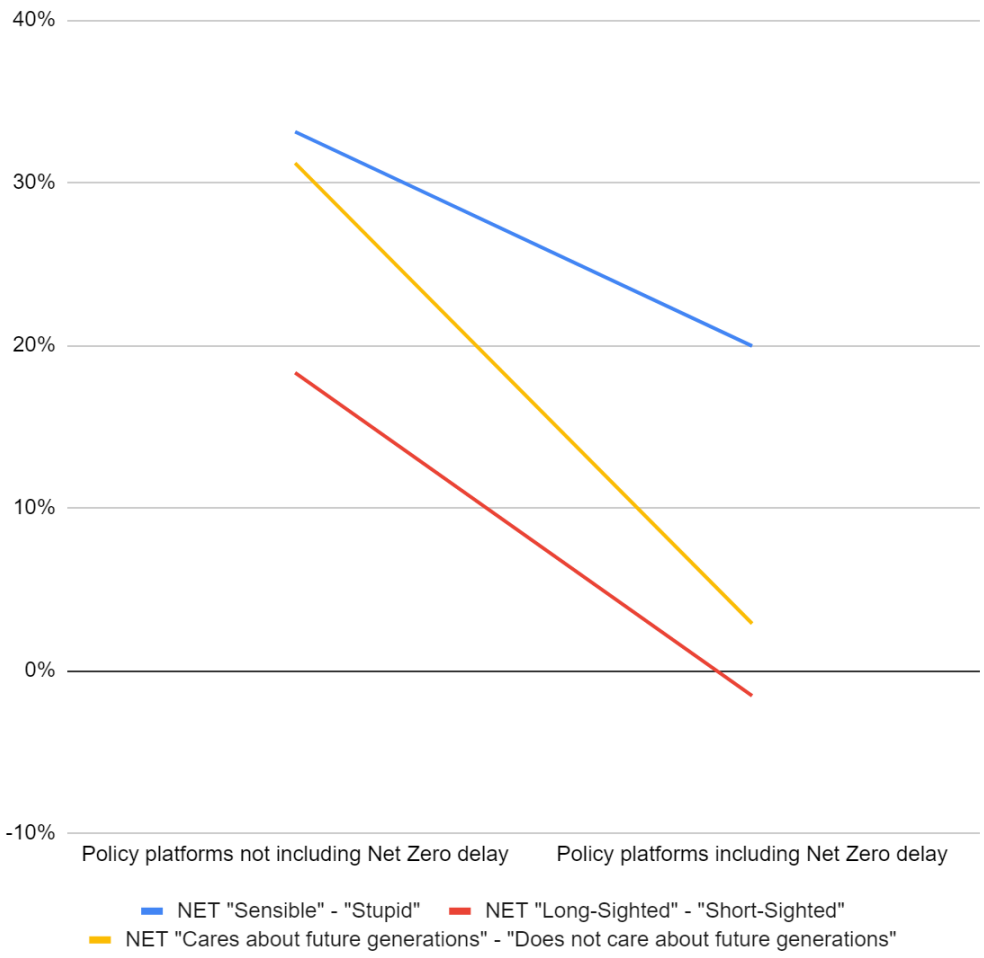
Chart 10: Electability scores for policy platforms including specific policies, split by swing voters and Conservative 2019 voters (unweighted)



On the other hand, oil and gas drilling was considerably better received among Conservative 2019 voters and swing voters alike. For example, while sample-wide a party which proposed drilling was felt to align with the respondents values for 37% of the sample, and not 27%. For swing voters, this rose to 45% and dropped to 21% respectively. For 2019 Conservatives, 48% and 20%.

But delaying Net Zero was still divisive for this group. In our straight-froward support-oppose question, we find swing voters were more likely than others to support the policy. But the brand impacts were still visible among this group. As an example, platforms which did not include delays to Net Zero were felt to be caring for the next generation by 50% of swing voters, but when delay was included this fell to 35%, as many as felt it was not caring. Meanwhile, including a delay had no real impact on whether a platform was felt to be low tax for swing voters, and slightly shifted views of the platform towards “stupid” rather than “sensible”.

Chart 11: Changes in key brand perceptions from including a Net Zero delay in a policy platform among swing voters only (weighted, NET scores shown)



Our results indicate that green policy is well received among swing voters, but also that anti-green policy is slightly less detrimental for this group. Delaying Net Zero is still among the worst performing policies of the ones we tested, and suffers from the same brand risks among this group, but oil and gas drilling was barely a vote loser.

Impact on other key voter groups

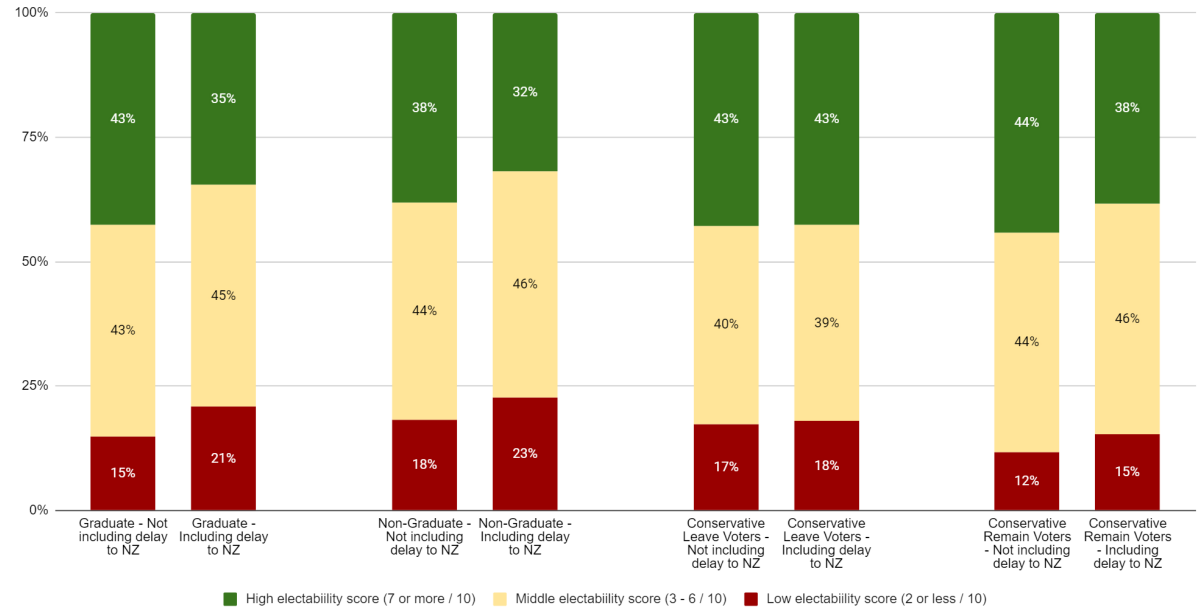
Beyond the key swing voter group, we also examined the impact among the following groups in more detail:

- 2019 Conservative voters split by socio-economic grade
- 2019 Conservative voters split by Leave and Remain
- 2019 Conservative voters split by age, under-40s and 40s and over
- Those with and without graduate degrees
- Those who say they "Don't Know" how they will vote

Firstly on the key electability question, we baseline against the average electability each group indicates (for example, among graduates party platforms received an average score of 5.66, among Non-graduates this was 5.3).

We find that delays to Net Zero have a stronger negative impact among Graduates than Non-Graduates, reducing electability by 0.61 compared to 0.35. We also find that delaying Net Zero has a relatively neutral effect on 2019 Conservatives over 40 and 2019 Conservatives who voted Leave, whilst having a small but significant negative impact on scores among Remain voters ($p<0.05$) and Under-40s ($p<0.05$) who vote Conservative in 2019. In other words our results indicate that a policy like this pushes away Conservative Remainers and younger Conservatives without making much in the way of gains among their Leave and older counterparts (Chart 12).

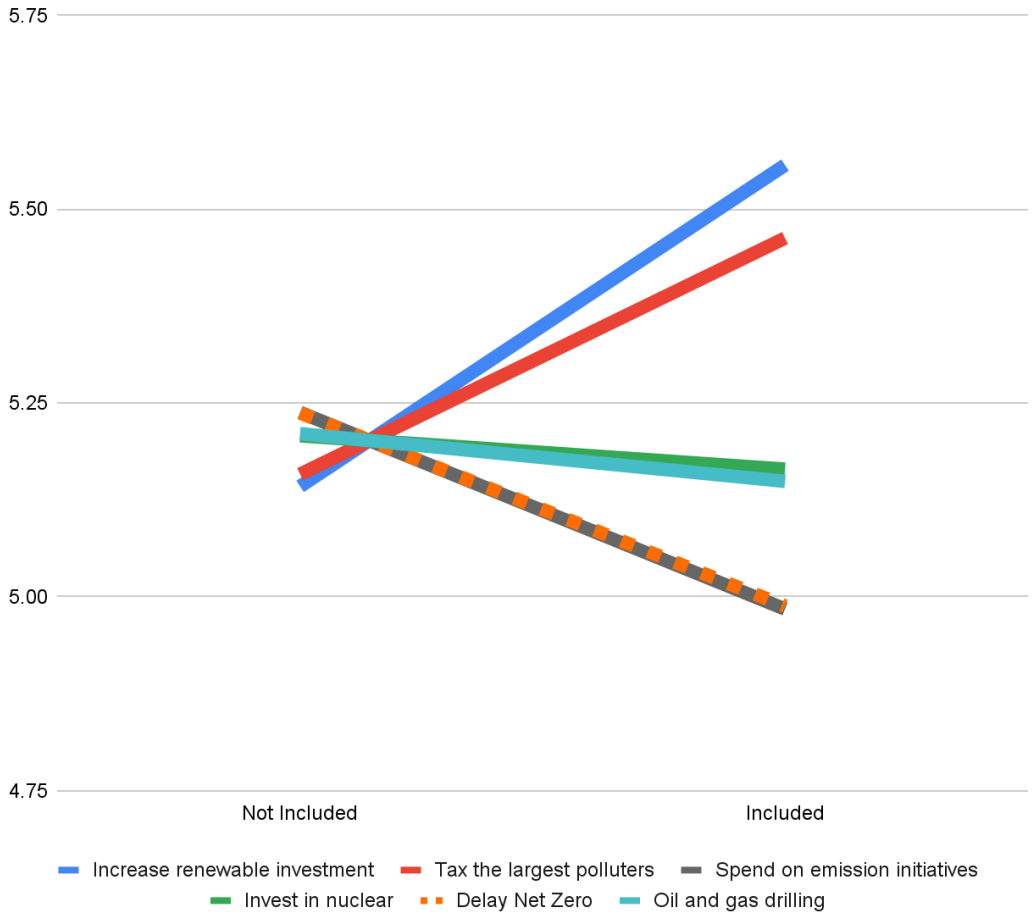
Chart 12: Changes in grouped electability scores form including Net Zero delays, comparing graduates and non-graduates, Conservative Leave voters and Conservative Remain voters (weighted)



Among those who say they do not know how they would vote, patterns on the impact of environmental policy are generally in line with the sample as a whole (Chart 13). We do find, however, that generalised government spending for carbon reductions has a negative impact on electability among this group, to the same extent as delaying net zero, while oil & gas drilling has a relatively neutral impact.

Chart 13: Change in average electability of party platforms containing each policy among only those who do not know how they will vote (unweighted)

Note: Spend on emission initiatives is shown in grey, and is overlapped with the delay to Net Zero shown in dotted orange



Part 2: Impact of car and boiler announcement

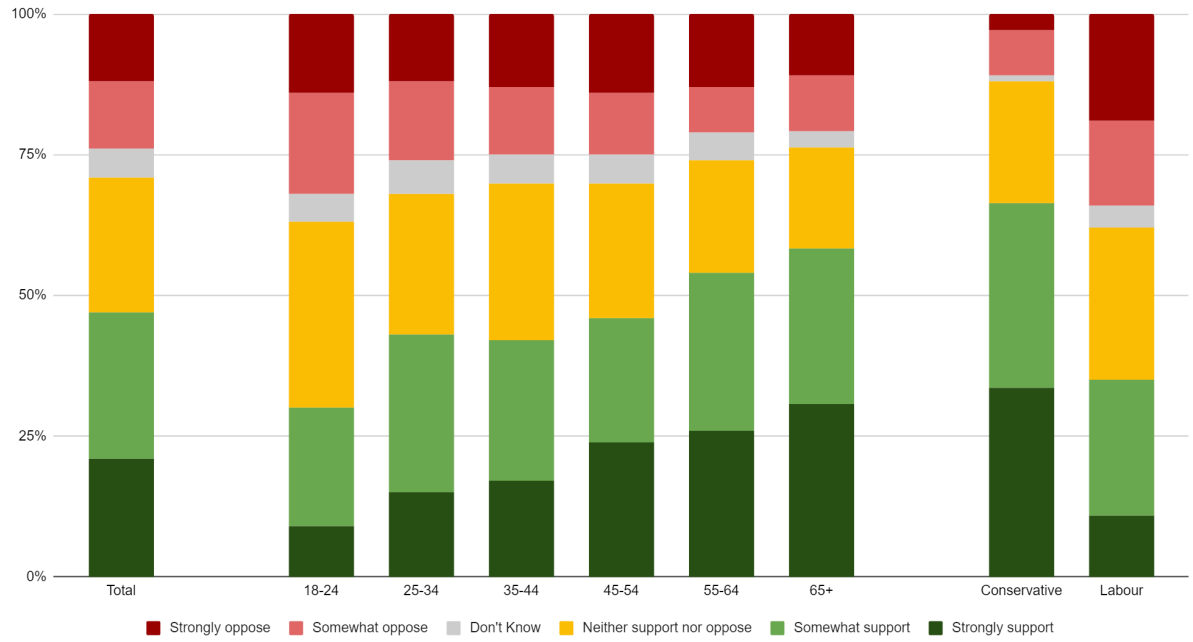
General perceptions of the announcement

Awareness and base support

Our results indicate that awareness of the announcement was relatively high, with 74% claiming to have heard about the announcement, although only 33% confident they could explain what the announcement had been. As is often the case, higher social grade respondents were more confident in their ability to explain the announcement (46% confident among AB, 23% among DE), as were older respondents (45% of 65+ year olds, 24% of 18-24 year olds).

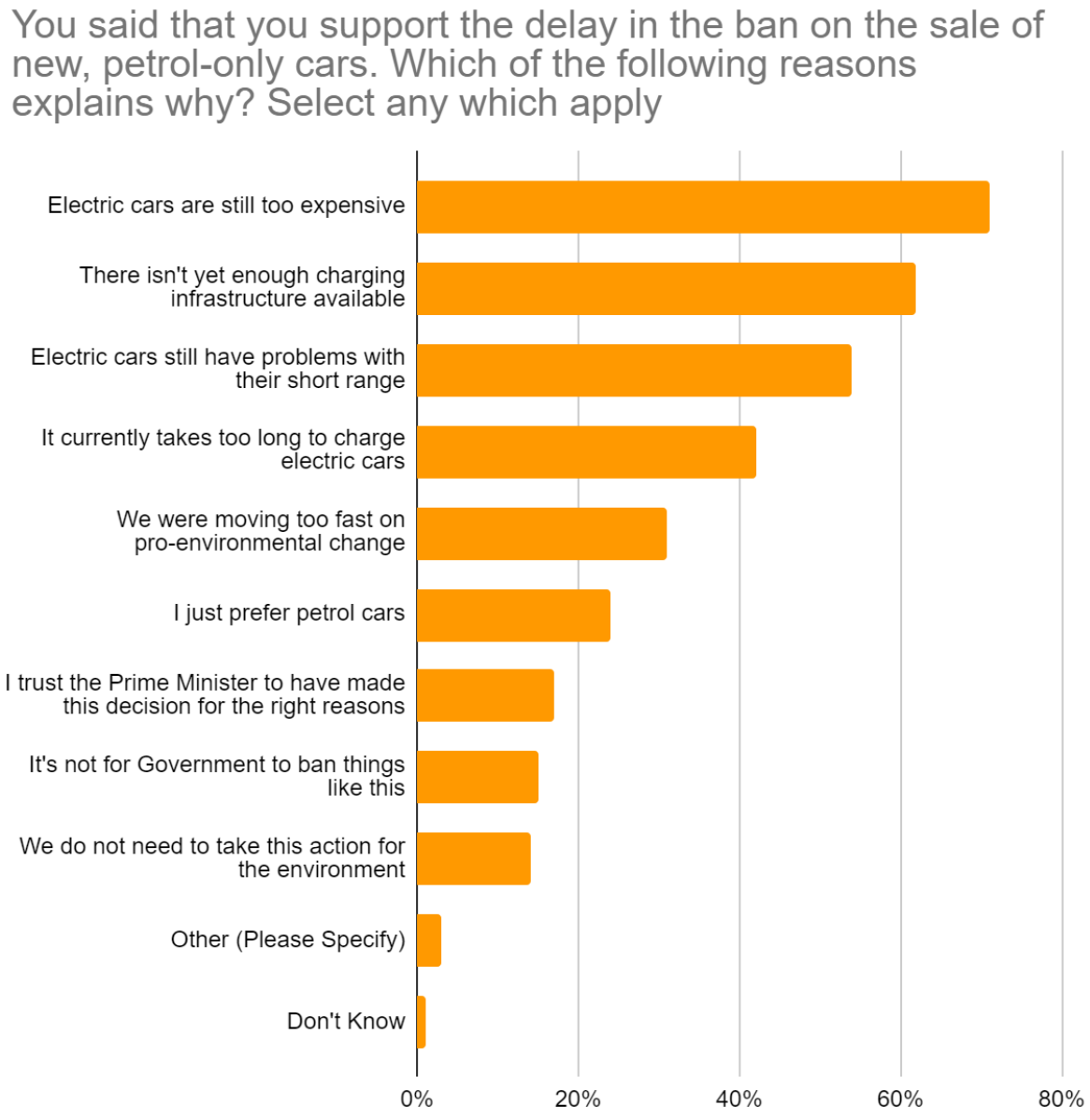
We find plurality support for delay to the ban on sale of brand new petrol cars, 47% support and 24% oppose. Support was considerably higher among those already planning to vote Conservative, and older respondents.

Chart 14: Support for the delay to the petrol car ban, by age and vote intention (weighted)



The main reasons for support for the policy were practical reasons on the challenges of transition to EVs. The top reason people supported the delay was that EVs are still too expensive, followed by the lack of charging infrastructure. Only 31% of those who supported the delay did so because we were moving too fast on pro-environmental change, and only 17% because they trust the PM to make the right decisions for the right reasons.

Chart 15: Top reasons for support for the delay (weighted)

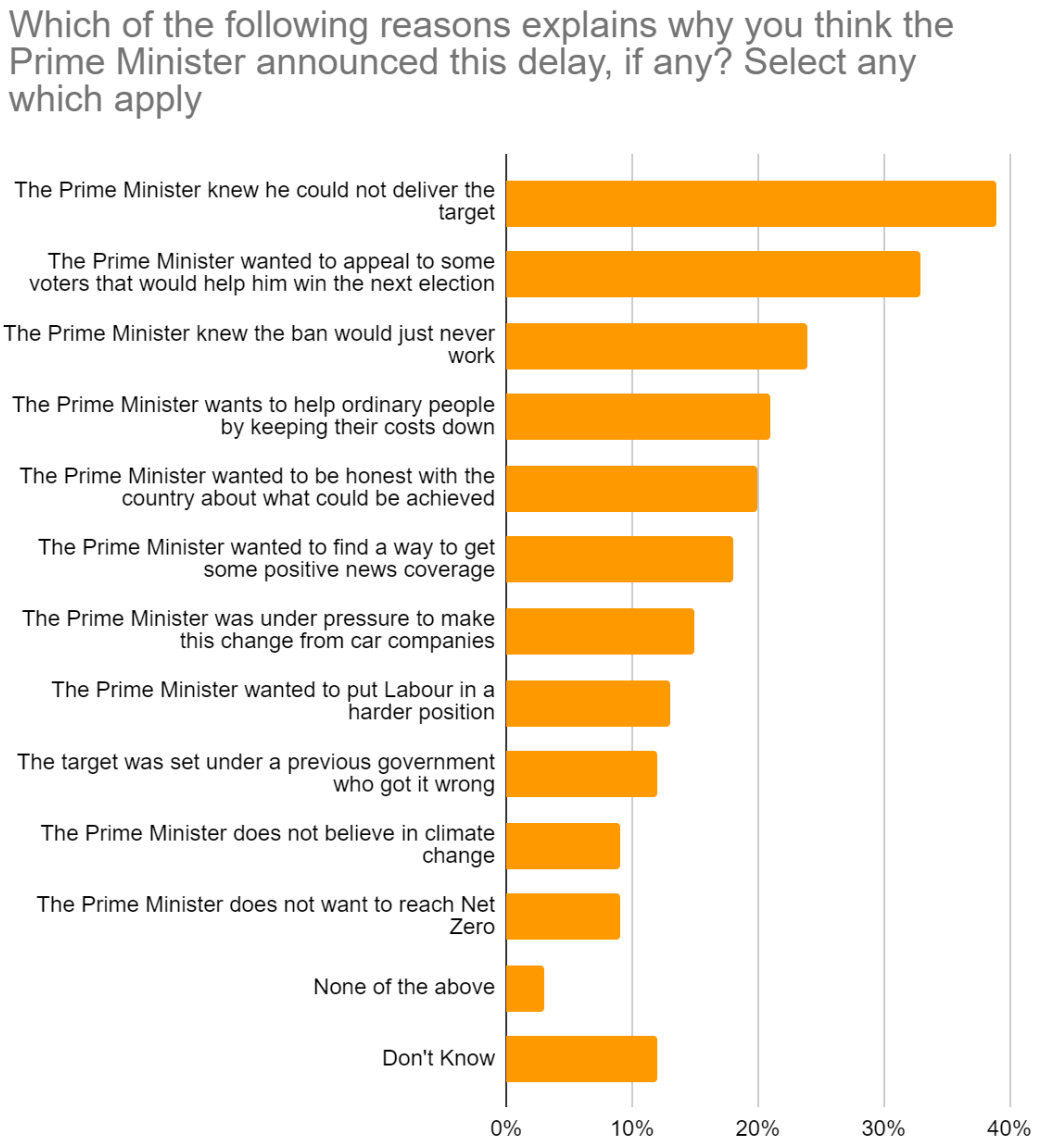


Perceived reasons for the delay

The reasons which the public believe this decision was made are a bit more challenging for the PM. The top reasons people believe this delay was made were because the PM knew he could not deliver the target (39%), because he wanted to appeal to some voters (33%), and because the PM knew the ban would never work (24%). 21% felt the ban came as a result of wanting to help ordinary people, and 20% because the PM wanted to be honest about what could be achieved.

This risk of being seen as unable to deliver is the main risk from this announcement. 30% of the public feel that this announcement has made it less likely the Government will keep its promises on other issues, while just 12% think it has made it more likely. Only 25% of those currently planning to vote Conservative think it has made it more likely the Government will keep their promises on other issues, 11% say less likely, most think it has had no effect either way or are unsure.

Chart 16: Top reasons the public believe the delay was announced (weighted)



In positive news for the PM, only 9% say that the PM does not believe in climate change and made this decision as a result, and 9% that the PM does not want to reach Net Zero. Given the risks of appearing to be against Net Zero, it is a positive outcome for the PM that this announcement did not have a huge impact on the perceptions of his own green motivations.

Only 17% say they previously thought the PM cared about the climate but now do not believe that he does, although only 29% of the public believe the PM cares about the climate in general (and 62% of those intending to vote Conservative).

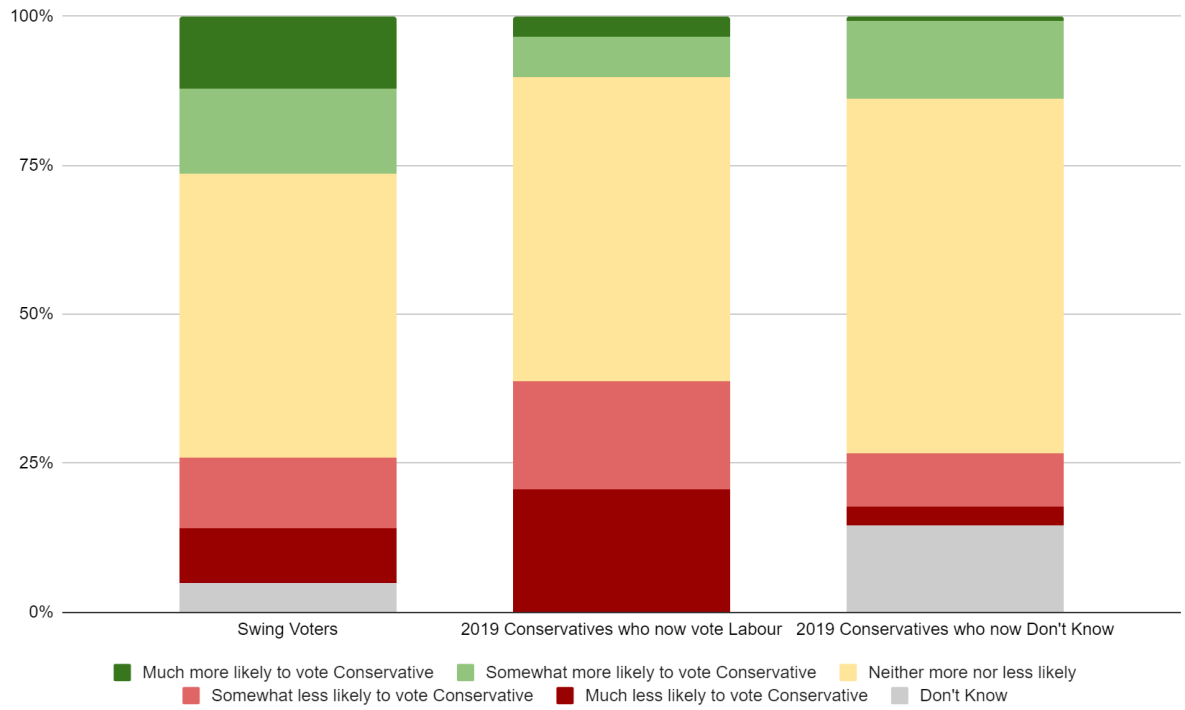
Views among swing voters

57% of the key group, 2019 Conservatives that were 5+/10 likely to vote Labour, support this announcement. Although, even among this group, 27% feel the change in policy has had the impact of making it less likely the Government will keep their promises on other issues.

When it comes to actual electoral impacts, it is unlikely this specific announcement shifted the dial much. 26% of swing voters say it has made them more likely to vote Conservative, 21% say it has made them less likely to vote Conservative. Fortunately for the Conservatives, 49% of those who plan to vote for them at the next election say this has made that more likely, while 47% say it has had no effect either way. In other words, this has not cost the Conservatives votes among their current base, although it is worth remembering that this base is not sufficient to win the next election.

Among the group crucial to understanding current Labour polling leads (those who have switched from 2019 Conservative to either Labour or Don't Know), the effect was more negative. 39% who have switched from Conservative to Labour say this announcement made them less likely to vote Conservative, just 10% more likely. Among those 2019 Conservatives who now Don't Know how they will vote, 14% say it has made them more likely to support Conservative, 12% less likely, meaning for the vast majority this has not made much of an impact.

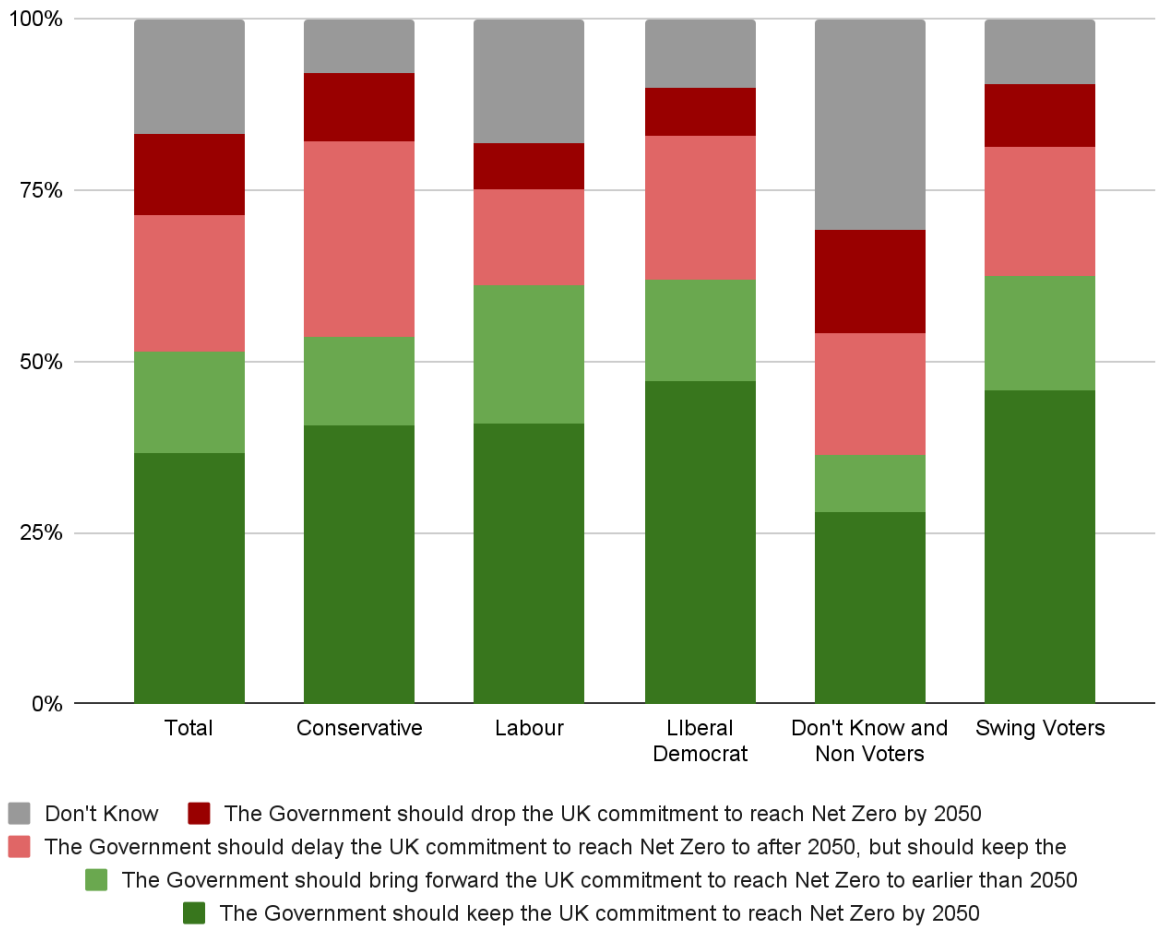
Chart 17: Impact on Conservative vote likelihood among key voter groups (weighted)



Net Zero remains popular

As an important final note, we still find majority cross-party support for the 2050 Net Zero target. 52% either support the target, or would bring it forward. 20% would support delaying, and 12% would support dropping the target entirely. 53% of Conservative voters, and 61% of Labour voters, support the target or bringing it forward. Notably, swing voters look more like Labour voters than Conservative voters on this issue, with 63% supporting the target or supporting bringing it forward.

Chart 18: General support for the Net Zero target, delaying it, dropping it, and bringing it forward (weighted)



While broadly the announcement seems to have had little impact, despite being relatively risky given the broad support for environmental policy across the public and swing voters alike, our results indicate that doubling-down on anti-environmental policy is risky for the Conservatives. It does not appear to have had the impact of making the party better trusted to deliver, and if anything risks appearing like the party is unable to deliver on pledges.

Conclusion

This research demonstrates that the risks from policies that are perceived to be anti-environment to party platforms are significant. These include the general risk of being seen as less electable, but also being seen as uncaring for future generations, short-sighted and anti-environment. The last point may feel obvious, but it is important to understand that it would be very challenging for a party to put forward a proposal to delay Net Zero, or drill for more oil and gas, and hold onto pro-environmental credentials.

Having a bold platform of more renewable investment, and even introducing taxes on polluters, is a vote winner. Delaying targets, and even committing to drilling more oil & gas in the North Sea, tends to lose support, if anything. We find that in part this reflects the heavy drop in support for a policy platform among the large group who oppose Net Zero delay, which is not matched by a swell in support among those who support it. In short, the risks of anti-environmental stances among pro-environment groups are larger than the benefits among their counterparts.

Further, the Conservatives are now playing a risky game, being seen to be on the wrong side of this argument. It is notable that the anti-environment policies were felt to make a policy platform more Conservative, whilst also reducing the popularity of that platform. Our research indicates that this is one of the major ways that today's Conservative party is seen to be out of step with the public; anti-environmental policies are both unpopular and seen to be on-brand for the Conservatives.