

Great Restorations

Setting the long-term direction for climate and environmental policy.

William Nicolle



Great Restorations

Setting the long-term direction for climate and environmental policy.

William Nicolle



Policy Exchange is the UK's leading think tank. We are an independent, non-partisan educational charity whose mission is to develop and promote new policy ideas that will deliver better public services, a stronger society and a more dynamic economy.

Policy Exchange is committed to an evidence-based approach to policy development and retains copyright and full editorial control over all its written research. We work in partnership with academics and other experts and commission major studies involving thorough empirical research of alternative policy outcomes. We believe that the policy experience of other countries offers important lessons for government in the UK. We also believe that government has much to learn from business and the voluntary sector.

Registered charity no: 1096300.

Trustees

Alexander Downer, Pamela Dow, Andrew Feldman, David Harding, Patricia Hodgson, Greta Jones, Andrew Law, Charlotte Metcalf, David Ord, Roger Orf, Andrew Roberts, Robert Rosenkranz, William Salomon, Peter Wall, Simon Wolfson, Nigel Wright.

About the Author

William Nicolle was a Research Fellow in Policy Exchange's Energy and Environment Unit between 2019 and 2021. Before joining Policy Exchange, William worked as a Graduate Analyst for Centrica and at another London-based think tank. He has a BA in Geography from the University of Oxford, and he is working towards an MSc in Environmental Policy and Regulation from the London School of Economics.

Acknowledgements

The author would like to thank the many stakeholders who provided input and views to this report, including Ed Birkett, Martin Boon, Jessica Nicholls, Ben Goldsmith, David Goodhart, Sam Hall and Benedict McAleenan as well as those that wished to remain anonymous.

This report was produced by Policy Exchange and the views and the recommendations in the report are those of Policy Exchange.

© Policy Exchange 2021

Published by

Policy Exchange, 8 - 10 Great George Street, Westminster, London SW1P 3AE

www.policyexchange.org.uk

ISBN: 978-1-913459-83-3

About the Policy Exchange Energy and Environment Unit

Policy Exchange's award-winning Energy & Environment unit examines the issues and challenges in achieving a sustainable economy whilst promoting prosperity and democratic values. The unit's recent work includes:

- *Reforming Australia's Electricity Market* (December 2021), which explores planned reforms to the Australian electricity market and looks for lessons for the UK
- *Nature and the City* (December 2021), which proposes way to make cities greener through new environment and planning policies.
- *Beyond the Energy Crisis* (December 2021), which argues for banking-style "stress tests" on energy suppliers and an increased focus on "smart electricity tariffs" to reduce energy bills and cut emissions.
- *Unleashing Climate Capital* (October 2021), the second edition of Policy Exchange's energy and environment journal, *Environmental Affairs*.
- *Crossed Wires: Maintaining public support for offshore wind farms* (July 2021), which proposes measures to maintain public support for offshore wind farms, including enhanced coordination between projects to share infrastructure and compensation for affected communities.
- *Beyond COP26: The UK's Green USPs* (June 2021), which argues that the UK must harness its 'Green Unique Selling Points' to boost jobs at home and environmental progress around the world.
- *The Geopolitics of Climate Change* (April 2021), the first edition of Policy Exchange's new quarterly journal, *Environmental Affairs*.
- *Capital Shift* (March 2021), which argues that the UK should use its presidencies of COP26 and the G7 to green the financial system.
- *Charging Up* (February 2021), which sets out a new approach to ensure a comprehensive and high-quality national network of public charge points for electric vehicles.
- *Powering Net Zero* (December 2020), which proposes local electricity pricing as the key to delivering a Net Zero energy system.

The Unit comprises five specialists, actively supported by Policy Exchange's team of in-house economists and policy specialists, as well as a network of experts in industry, government, academia and beyond.

Ed Birkett, Head of Energy & Environment

Ed leads Policy Exchange's Energy and Environment Unit. Ed joined Policy Exchange in 2020 after spending a year at Harvard as a Kennedy Scholar. For the previous five years, he worked in the UK energy sector, most recently as a developer of large-scale solar and energy storage projects. He has an MEng in Engineering Science from the University of Oxford.

Josh Buckland, Senior Fellow, Energy & Environment

Josh is a Senior Fellow with Policy Exchange's Energy & Environment unit. Josh was previously Energy Advisor to the Secretary of State for Business, Energy and Industrial Strategy. In this role he provided expert policy and strategic advice to both Greg Clark and Andrea Leadsom on all major energy and climate issues. Josh spent two months working as a senior advisor within the COP26 Unit. Previously he held a number of other senior roles at the centre of Government, including spending three years in the Prime Minister's Policy Unit in No10 Downing Street working on energy and environment issues. He was also Head of the Energy Policy team in HM Treasury.

Dr Ben Caldecott, Senior Fellow, Energy & Environment

Ben is a Senior Fellow with Policy Exchange's Energy & Environment unit. Ben is the founding Director of the Oxford Sustainable Finance Programme at the University of Oxford Smith School of Enterprise and the Environment. At the University of Oxford, he is the inaugural Lombard Odier Associate Professor and Senior Research Fellow of Sustainable Finance, the first ever endowed professorship of sustainable finance, and a Supernumerary Fellow at Oriel College. Ben is also the founding Director and Principal Investigator of the UK Centre for Greening Finance & Investment (CGFI), established by UK Research and Innovation in 2021 as the national centre to accelerate the adoption and use of climate and environmental data and analytics by financial institutions internationally. Ben specialises in environment, energy, and sustainability issues and works at the intersection between finance, public policy, and academe, having held senior roles in each domain. Among his previous roles, he was Research Director for Energy and Environment at Policy Exchange between 2008 and 2009.

Dr Mike Jones, Senior Fellow, Energy & Environment

Mike Jones is a Senior Research Fellow in the Energy & Environment Unit. He was a member of David Cameron's Global Poverty Commission and, subsequently, an advisor to the Conservative Party in Wales. In 2018 he completed his Ph.D. at the University of Bath. In 2020-21, Mike undertook research for Frank Field, a former Welfare Minister, and Cool Earth, a UK-based international NGO that protects endangered rainforest.

Benedict McAleenan, Senior Fellow, Energy & Environment

Benedict McAleenan is a Senior Fellow in the Energy & Environment team, which he led between 2019 and 2021. Benedict is the Founder and Managing Partner of Helmsley Partners, which provides government relations and political risk services to the energy sector. He is a public policy adviser with 15 years' experience in policy development, political risk and thought leadership in the Energy, FMCG, Property, Manufacturing and Engineering sectors. Benedict has advised clients including National Grid, Centrica Energy, the Renewable Energy Association, Madison Square Garden Company, OVO Energy, Shell, Sainsbury's and Balfour Beatty.

Contents

About the Author	4
Acknowledgements	5
About the Policy Exchange Energy and Environment Unit	6
Executive Summary	10
1. Introduction	15
2. Methodology	18
3. Five Climate Tribes	20
4. Policy Preferences	21
5. Moral Priorities	43
6. What are the implications for climate and environmental policy?	53
Glossary	55

Executive Summary

Net Zero is not a single policy, but a broad strategic objective that affects many areas of life in the UK and beyond. It is driven by scientific advice, but is essentially a long-term and wide-reaching policy programme. Our main concern is the political sustainability of Net Zero, which must not only maintain support from the current generation of voters, but from voters over the next thirty years through at least six General Election cycles.

The report presents conclusions from polling conducted earlier in 2021, which identifies five ‘Climate Tribes’, whose views on climate change are identifiably distinct. We look at the moral priorities of each of these tribes, using Jonathan Haidt’s Moral Foundations Theory (MFT), to better understand what drives their attitudes towards climate change as well as their policy preferences.

MFT theory allows us to understand not simply what voters believe about environmental policies, but why. Doing so helps to inform policy design over the longer term, because these underlying factors are likely to be more fundamental to voters’ attitudes and therefore longer lasting. A long-term policy programme such as Net Zero should therefore seek to understand such fundamentals.

Our analysis suggests that care for others and the limitation of harm are the foremost moral drivers for voters, as well as fairness and the protection of ‘sacred’ things, such as the beauty of British landscapes and pristine areas such as ocean environments.

Our results also highlight where local relevance is important to the popularity of climate and environmental policies, partly reflecting David Goodhart’s work on ‘Somewheres’ and ‘Anywheres’.¹ We then explore six trends to emerge from the data, and their implications for climate and environmental policies that are politically sustainable.

Five Climate Tribes

- **Climate Prioritisers (41% of UK adults, median age bracket 45-54)** strongly believe that climate change is a dangerous man-made issue that is already harming society, demanding immediate, sometimes radical action. They are driven, above all, by issues that are framed as care versus harm. They vote in roughly equal numbers for the Conservatives and Labour, and a sizeable minority vote for the Liberal Democrats.

1. David Goodhart (March 2017). *The Road to Somewhere: The Populist Revolt and the Future of British Politics*. Hurst & Company.

- **Climate Pragmatists (26% of UK adults, median age bracket 45-54)** also strongly believe that climate change is a man-made and an immediate threat, but think it can be managed with a gradual, more moderate response. They are similarly driven by policies framed as care versus harm.
- **Climate Neutrals (16% of UK adults, median age bracket 45-54)** believe climate change is real but the threat it poses is overhyped, so most favour a moderate or non-interventionist, market-led response. They are driven by a broad base of issues, but with a slight lean towards issues framed as care versus harm and fairness versus cheating. arm. They are more likely to vote for the Conservatives, although a sizeable minority votes for Labour. They are also more likely to support the UK Independence Party (UKIP) and the Brexit Party compared to the UK average.
- **Climate Hesitators (11% of UK adults, median age bracket 25-34)** think climate change is probably a natural phenomenon, but they are deeply unsure in their opinions, and consequently, they do not know what the best response could be. They are not driven by any particular type of issue. They vote for the Labour and the Conservative Parties in roughly equal numbers. They are also more likely to support UKIP and the Brexit Party compared to the UK average.
- **Climate Sceptics (7% of UK adults, median age bracket 45-54)** tend to believe climate change is not real but if it is, it is not caused by humans, rendering it a mistake or a hoax. They are captured by issues framed as fairness versus cheating, care versus harm and authority versus subversion in roughly equal measures. They are much more likely to vote Conservative. They are also more likely to support the UKIP and the Brexit Party compared to the UK average.

In addition to these Tribes, we also identify six trends emerging from our research that reflect important political developments, and which should be considered by policymakers when designing long-term climate and environmental policies (Figure 1). Our analysis is partly centred around the *Ten Point Plan for a Green Industrial Revolution*, a strategic document published in November 2020 setting out the Government's vision for post-COVID climate and environmental policies.²

2. HM Gov (2020). *The Ten Point Plan for a Green Industrial Revolution* ([Link](#)).

Figure 1. Summary of the key trends in this report.

	Key trends in our analysis	Example
1	The <i>Ten Point Plan</i> is popular, but the consensus on some issues is weak	Phase-out of ZEVs, new nuclear and developing CCUS technologies are more unpopular than other areas
2	Policies that work with markets attract the greatest support	Public are 33% more likely to prioritise 'green growth' policies 'regular' economic growth
3	Climate and environmental policies which limit consumer choices attract less support	ICE vehicles, gas boilers and diets are live wire issues for climate/environmental policies
4	The public want evolution not revolution	¼ of adults want radical change for climate but they do not support the policies needed to make this happen
5	Where you live indicates your priorities, although there is no difference between Red Wall and Non-Red Wall areas	Outside of London people are more likely to support locally framed issues.
6	Who you voted for in the 2019 General Election indicates your policy priorities	Brexit Party and UKIP voters strongly prioritise local environmental policies over global climate change policies

Implications for climate and environmental policy

Policy Exchange will return to the detail of what this means for the UK's current climate and environmental policies in subsequent reports . Several conclusions arise from the polling and related research conducted for this report:

1. **Fairness first:** Those responsible for causing climate change and environmental damage bearing a fair burden for stopping or reversing it. This reflects the general prioritisation of the fairness/cheating moral foundation, which came second only to the care/harm foundation. It also reflects the popularity of policies which minimise cost rises for households and channel costs towards polluters. Notably, the distinction between minimising cost rises for households and the polluter pays is the same in practice; households are often polluters themselves, and cost increases shouldered by the private sector are likely to be passed to consumers over time. Our results suggest that policies which frame consumers paying 'implicitly' (e.g. through the private sector, leading to price increases over time) rather than explicitly (e.g. paying upfront through directly taxing petrol and diesel cars) are consistently more popular, and therefore politically more sustainable.

The Government needs to tackle the question of costs are framed upfront in its framing of decarbonisation policies. For instance, tackling climate change is likely to require the use of carbon border adjustment mechanisms (CBAM) to avoid offshoring emissions. As previously argued by Policy Exchange, CBAMs could

be economically regressive against lower- and middle-income groups without a clear emphasis on fairness in their design, such as through a ‘carbon dividend’.³ To ensure political sustainability, climate policies must be applied broadly and with a clear rhetorical emphasis on fairness

- 2. Determined-but-steady transition:** Over half the public support a determined-but-steady approach to climate change, characterised by significant policy change and investment in new technologies over the next few decades. In contrast, a quarter support sudden and radical policy shifts such as ‘de-growth’ (intentional economic slowdown or recession to lower environmental impacts) or alternative democratic models such as a climate assembly. Notably, breaking the law to make the case for the climate change is the least popular statement tested in our analysis. Those who think we should let free markets adapt over time are also in a small minority, and hardly anyone believes we should take no action at all.

The current government’s ‘10 Point Plan for a Green Industrial Revolution’ and its Net Zero Strategy mostly reflect the public’s priorities for action on climate change and the environment through its policies of investment in green technologies and industries as well as the protection of landscapes. The Plan’s Achilles heel is nuclear power, which may only be politically palatable to the public if it is ‘out of sight’ from most communities and if its costs are minimised for consumers.

One of the most striking results of this work is that only a small proportion of the UK public are willing to sacrifice the things they value to achieve the goal they think is desirable. In particular, the petrol and diesel vehicle phaseout and the prospect of transitioning away from gas boilers are near the bottom of every Tribe’s priorities, highlighting the political disconnect between people’s support for and implementation of Net Zero.

- 3. Respect local & diverse communities:** Whilst climate change and ecological decline are global challenges, the UK should be very clear about its actions at home as well as abroad. These should include investment in the landscape and improving local wildlife, which are highly valued by communities throughout the UK. London is unsurprisingly the most ‘internationalist’ region, and therefore the most amenable to arguments relating to global challenges. London is also the most ethnically diverse region, and ethnic minorities show a pronounced presence among ‘Climate Hesitators’. This highlights a need to understand their environmental priorities in greater depth.

3. Matt Rooney et al (2018). *The Future of Carbon Pricing: Implementing an independent carbon tax with dividends in the UK* ([Link](#)).

- 4. Use market-based policies and maximise choice:** A majority prefer policies that work with markets by investing in private sector research and development or supporting industries in their earliest stages. Policies that impact on common aspects of life in a short time frame and policies designed to limit economic growth are generally less popular. They broadly prefer solutions which maximise choice, such as creating attractive new products and ideas. Notably, they are willing to accept more interventionist policies on some standalone issues, such as banning single-use plastics, the 2030 ban on petrol and diesel vehicles and the introduction of heat pumps. These are all policies that impose on consumer lifestyles, yet enjoyed majority support in our polling.

1. Introduction

When Clement Attlee and Margaret Thatcher began their first terms of office as paradigm-shifting Prime Ministers, each had a long-term plan for the United Kingdom. Attlee sought to create a welfare state that gave more support to its poorest citizens, and Thatcher wished to modernise the nation and unleash the energy of each member of society. Each leader recognised that the mission was long-term and would therefore require institutional and strategic vision.

They created or endorsed think tanks, reorganised government, created institutions (the largest being the NHS) and imposed their own economic thinking. Their programmes were not about the next five or ten years, but about deep reforms that would still be in action thirty years later.

The world faces a similarly profound challenge in its drive to become 'Net Zero' – the target of removing or offsetting all greenhouse gas emissions by 2050. Net Zero demands that economies transition away from fossil fuels towards clean technologies, necessitating the long-term and epoch-defining leadership associated with Attlee, Thatcher and others.

The UK is stepping up to this challenge. Over the last two decades it decarbonised faster than any other G20 nation.⁴ At the same time, public support has remained strong, with climate change being one of the top issues to voters.

However, behind the UK's success lies an uneven drive by the international community to decarbonise. Some countries are avoiding their responsibilities by putting off rapid decarbonisation, while others are actively undermining global efforts to fight climate change, such as China's growing addiction to coal.⁵ This threatens to worsen climate change, as well as undermine domestic political support for decarbonisation.

It is tempting to stop here and think that the UK should give up its drive to decarbonise, given the reluctance of other major players. However, there is good news on several fronts.

Firstly, the human race has faced and overcome vast challenges in the past. Through political, technological and other innovations, it has radically reduced the incidence of war and violence over time, brought several diseases under control or eradicated them completely and created conditions for trade, education and prosperity that are unparalleled in history – not just as a proportion of people alive today, but as an absolute figure too. There is no reason to believe we cannot successfully beat climate change, although time is against us.

Secondly, there is a widespread acceptance, particularly in Western countries, that something urgent must be done to end climate change. As

4. PriceWaterhouseCoopers (2021). *Net Zero Economy Index* ([Link](#)).

5. Michael Standaert (2021). *Despite pledges to cut emissions, China goes on a coal spree*. Yale Environment ([Link](#)).

polling in this report makes clear, now is a good opportunity for politicians to act and show laggard countries the scale of change that is possible while maintaining the prosperity and freedom that has been central to the UK's long-term success as a state and as a society.

Thirdly, the UK has already made good progress. This is not an accident, but the result of a cross-party political settlement made in the late 2000s through the 2008 Climate Change Act, which created the Climate Change Committee, carbon budgets and a carbon pricing system.⁶ These have not been uncontroversial, but they have been successful thus far. At the heart of this has been the separation of scientific competence, which was left to scientists at the Climate Change Committee, and political competence, which has remained in Westminster and Devolved Administrations.

However, the UK's success has also rested on the fact that it mostly concerned the electricity system. As has been made clear by many commentators, the next challenges may be much harder, since they do not rely on negotiations with the owners of a few centralised power stations, but involve reforms that affect people's homes, transport and other ways of living.

In a world of sovereign nations and free trade, convincing other governments to take ownership of their emissions is no easy task. An optimistic take holds that the UK's negotiating position grows stronger with deeper national decarbonisation, but this also involves increasingly difficult political and economic choices.

Setting a long-term course

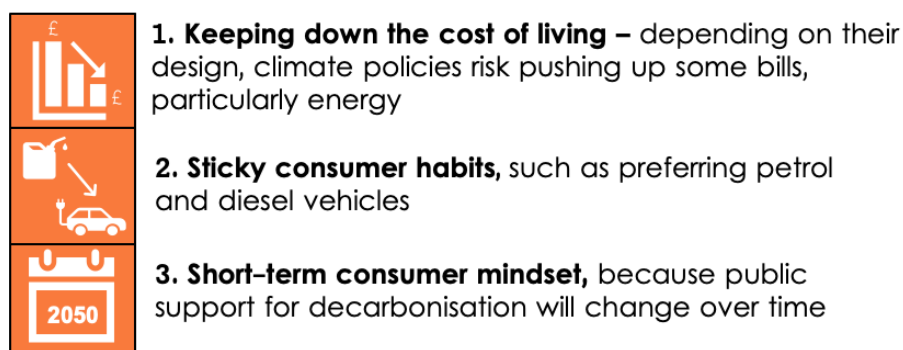
This paper looks at how to set a long-term policy direction that ends the UK's contribution to climate change in a politically and economically sustainable way. By 'sustainable', we mean that this agenda maintains a democratic mandate and supports economic prosperity over several decades.

In the electricity sector, the concept of a 'trilemma' has long been associated with the challenge ahead: how do we create an energy system that is secure, affordable and zero-carbon, all at once? In the traditional design of energy systems, this was not obvious, since things like wind power were seen as expensive and unreliable, meaning they undermined security and affordability, whereas other technologies might be cheap but polluting, such as coal. Slowly, this challenge is being addressed.

We argue that society at large faces a scaled-up version of the same question: How do we create a society that is democratic and free, prosperous, and net zero-carbon? Climate change presents policymakers with several hurdles before they can answer this question (Figure 2).

6. Climate Change Act, 2008 ([Link](#)).

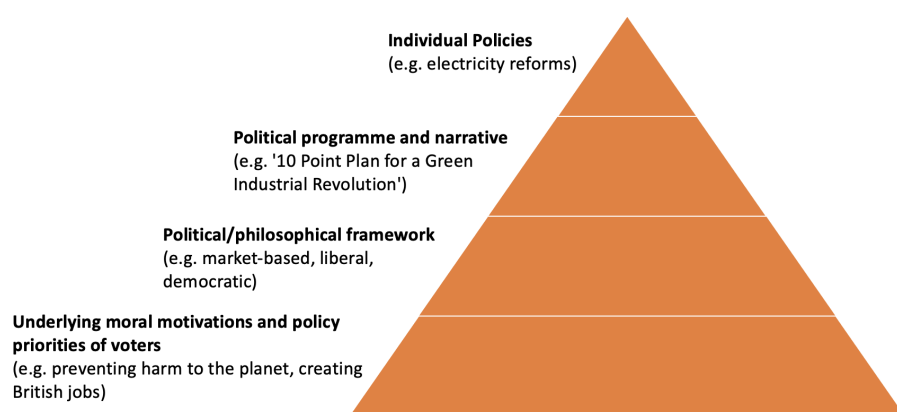
Figure 2. Climate change poses unique challenges for maintaining public support.



Source: Policy Exchange analysis

To overcome these hurdles, the government must understand the political challenge at several levels (Figure 3), and ensure coherence between these levels. At the most basic, this means understanding the moral motivations that underlie political views – why do people think the way they do about political issues? At the next level up, the government must create a political framework (what values does the government’s approach to Net Zero embody?) and a set of narratives to communicate and make the case for ‘Net Zero’. Finally, having made the case, the government must present policies that deliver on the rhetoric. Coherence is important. Individual policies that do not fulfil a clear programme will eventually be seen as disjointed, with implications at the ballot box. But political programmes or frameworks that do not match voters’ underlying moral priorities will meet even more profound resistance.

Figure 3. The elements of a long-term political framework.



Source: Policy Exchange analysis

This report examines the underlying moral motivations and policy priorities of voters, the most fundamental level for a lasting political framework.

2. Methodology

Our analysis involved two steps: A representative poll of the UK population (n = 4,141) to understand the main strands of public thought on environmental issues and what they think, and a modelling exercise to understand their policy priorities.

Step 1: Polling the UK population and integrating Moral Foundations Theory

The polling was conducted online by the polling firm Deltapoll between 12th and 16th February 2021, with a sample consisting of 4,141 British adults. The sample is representative of the UK adult population according to factors such as age, gender, socio-economic grades, and government region. A wide variety of cross breaks were included to increase the richness of the data, including on political views, voting intention and policy priorities, with a particular focus on the Government's *Ten Point Plan for a Green Industrial Revolution*.⁷

The poll clustered people based on their stated view on climate change, checking this for reliability by comparing it to their answers to subsequent questions. This proved to be a statistically consistent way of splitting the UK public into five groups (the 'Climate Tribes') based on similar views of climate change.

Further, building on Jonathan Haidt's Moral Foundations Theory, the polling explored each respondent's moral motivations by asking them to rate out of ten a series of situations that had varying degrees of moral seriousness.⁸ According to MFT, humans have a set of dials, each set to a particular level. Such variance helps to explain, as the subtitle to Prof Haidt's bestselling book states, why good people are divided by politics.

This is not about testing whether someone is a morally good person or is more morally sensitive than someone else but is designed to understand their moral priorities. For example, a person may be highly sensitive to scenarios where they perceive harm being inflicted on another person. This is the basis of a foundation known as *Care vs Harm*. Another person may be highly sensitive to scenarios where they see something sacred being defiled, such as a graveyard being vandalised. This is a foundation called *Sanctity vs Degradation*.

Haidt identified six 'Moral Foundations' in his studies, which were largely focused on American society. We added another foundation to our study, *Tolerance vs Intolerance*, in recognition of evolving debates in the UK over freedom of speech and related issues. By analysing respondents' moral profiles, we sought to understand underlying motivations in their views on political or societal issues.

7. HM Gov (Nov 2020). *The Ten Point Plan for a Green Industrial Revolution* ([Link](#)).

8. Jonathan Haidt (2012). *The Righteous Mind: Why good people are divided by politics*. Penguin.

The moral foundations are:

1. **Sanctity vs. Degradation:** To what extent does a scenario cause something pure or protected to be defiled, and to what extent is this morally (un)acceptable? E.g. vandalism, litter, insulting a religion.
2. **Tolerance vs. Intolerance:** To what extent does a scenario impinge on a person's right to go about their own business, and how acceptable is this? E.g. challenges to freedom of speech.
3. **Authority vs. Subversion:** To what extent must authority be respected and obeyed and is it acceptable to challenge it? E.g. respect for the police, religious figures, community leaders, parents.
4. **Loyalty vs. Betrayal:** How acceptable is it to deviate from the 'in group'? E.g. switching to another religion or political party, working with another country in conflict with your own.
5. **Fairness vs. Cheating:** To what extent does a situation involve going around the agreed rules, and how acceptable is this? E.g. companies not held accountable for breaking the rules, benefit cheats, cheating in sport.
6. **Care vs. Harm:** To what extent does a scenario cause harm to an individual or group? E.g. economic, social or physical harm.
7. **Liberty vs. Oppression:** To what extent does a scenario impinge on the liberties of an individual or group? E.g. political or economic rights.

Step 2: Estimating group's policy priorities

Our research also involved building a 'MaxDiff' polling model to estimate the policy preferences for different groups.

Regular survey-based polling is useful for understanding what people value out of a limited number of statements. However, there are two central constraints in taking this approach. The first is that respondents struggle to process large numbers of policy options in a single survey, leading to a lower quality of results. For instance, for someone to list 35 policy statements in order of preference, they would effectively need to evaluate over 600 different combinations of policies. The second is that people often say that they like *all* appealing options, even though real-life policymaking requires us to make choices and trade-offs.

The MaxDiff method requires respondents to decide between options by prioritising them, but only requires individual respondents to prioritise a small number, making it cognitively manageable. The statistical model then aggregates the group's responses to understand an overall list of priorities.

In our survey, each person was shown a small number of policy proposals to address climate change, out of a total of 35 that we tested across the whole group, and they were asked to rank them in order of priority. This was repeated for each respondent enough times across the sample so that most of the combinations of variables were covered. Based on the limited answers of many different individuals, the model can estimate the full list of priorities for any given group in the sample.

3. Five Climate Tribes

Our polling grouped the UK population according to their views on climate change, producing five distinct groups:

- **Climate Prioritisers (41% of UK adults)** strongly believe that climate change is a dangerous man-made issue that is already harming society, demanding immediate, sometimes radical action. They are driven, above all, by issues that are framed as care versus harm.
- **Climate Pragmatists (26% of UK adults)** also strongly believe that climate change is a man-made and an immediate threat, but think it can be managed with a gradual, more moderate response. They are similarly driven by policies framed as care versus harm.
- **Climate Neutrals (16% of UK adults)** believe climate change is real but the threat it poses is overhyped, so most favour a moderate or non-interventionist, market-led response. They are driven by a broad base of issues, but with a slight lean towards issues framed as care versus harm and fairness versus cheating.
- **Climate Hesitators (11% of UK adults)** think climate change is probably a natural phenomenon, but they are deeply unsure in their opinions, and consequently, they do not know what the best response could be. They are not driven by any particular type of issue.
- **Climate Sceptics (7% of UK adults)** tend to believe climate change is not real but if it is, it is not caused by humans, rendering it a mistake or a hoax. They are captured by issues framed as fairness versus cheating, care versus harm and authority versus subversion in roughly equal measures.

4. Policy Preferences

Climate Prioritisers (41% of UK adults)

Climate Prioritisers are the most pro-climate action of all the Climate Tribes, and that the lens through which they view the world is coloured by their beliefs on climate change. They prioritise climate and environmentally focussed policies over all other mainstream public policy goals like protecting personal freedoms (Table 1). This is not surprising given their strong stance on climate change.

Prioritisers also value policies framed as tackling issues at the global scale rather than those framed as operating at a more local scale. Again, this can be partly explained by their strong beliefs on climate change, which is a global commons issue. Our data further suggest that Prioritisers tend to be politically centre left, because they do not tend value traditionally centre-right policies very highly, such as a 'small state'.

Interestingly, Prioritisers bottom priorities reflect a contradictory tension in their views; they want to avoid 'forcing' and 'encouraging' people to change their lifestyles in some ways while at the same time wanting to restrict people from being completely 'free to do what they want'.

Although their overall views on the nature of climate change as an urgent, man-made problem is consistent, they diverge on the solutions, creating 'two tribes in one'. A large portion (42%) of Climate Prioritisers are genuinely radical, demanding an overhaul of democratic and economic institutions to tackle climate change as quickly as possible.

This 'tribe within a tribe' might be most closely associated with Extinction Rebellion. However, more than half (56%) of 'Climate Prioritisers' actually support more incremental change. This latter view in favour of determined-but-steady policy change is by far the dominant position across all but one Tribe (the exception being Climate Sceptics).

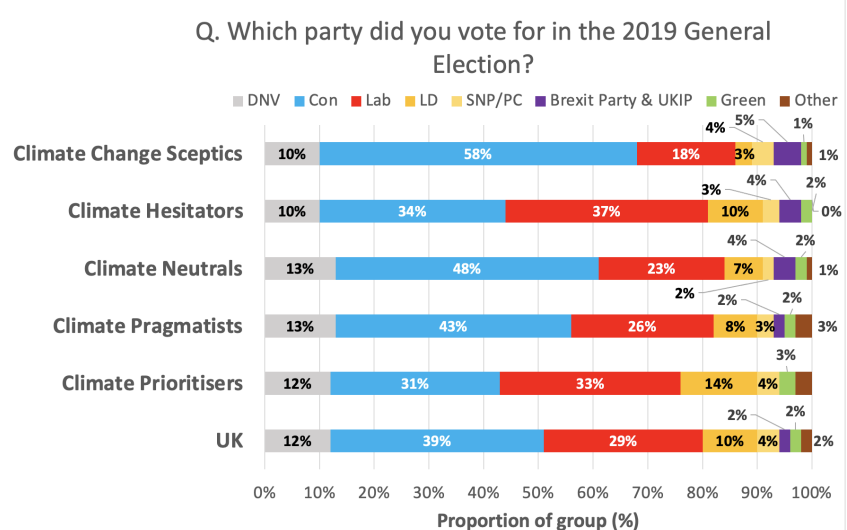
Table 1. Top and bottom policy priorities, Climate Prioritisers.⁹

Top 5 policy priorities	Bottom 5 policy priorities
1. Developing renewable technologies like wind and solar power to reduce carbon emissions.	1. Protesting about climate change, including breaking the law to make the point.
2. Addressing global climate change.	2. Leaving local communities, here and around the world, to manage their own local habitats even if we don't agree with their approach.
3. Banning or taxing single-use plastics to avoid polluting the oceans.	3. Encouraging everyone to eat less meat or switch to vegetarian diets.
4. Investing in 'green industries' like electric car manufacturing to provide sustainable jobs for the future.	4. Forcing people to change their gas boilers within 10 years to more energy efficient heating systems.
5. Investing in technologies that remove carbon from the atmosphere.	5. Ensuring people are free to do what they want.

The Tribe's political views are also mixed (Figure 4). In the 2019 General Election, around a third of Prioritisers voted for Jeremy Corbyn's Labour Party, and just under another third voted for the Conservatives. Arguably, this political split echoes the Tribe's internal differences over the best response to climate change; it is likely that Conservative-voting Climate Prioritisers (31%) make up the bulk of those that also support a moderate, more incremental response to climate change.

In contrast, Labour-voting members (33%) are likely to make up most of those in the Tribe that support a radical, anti- or degrowth based growth response to climate change, given these views are reflected in the 2019 Labour Manifesto.¹⁰ Notably, Prioritisers voted to remain in the European Union during the Brexit referendum by a margin of over 10% (Figure 5).

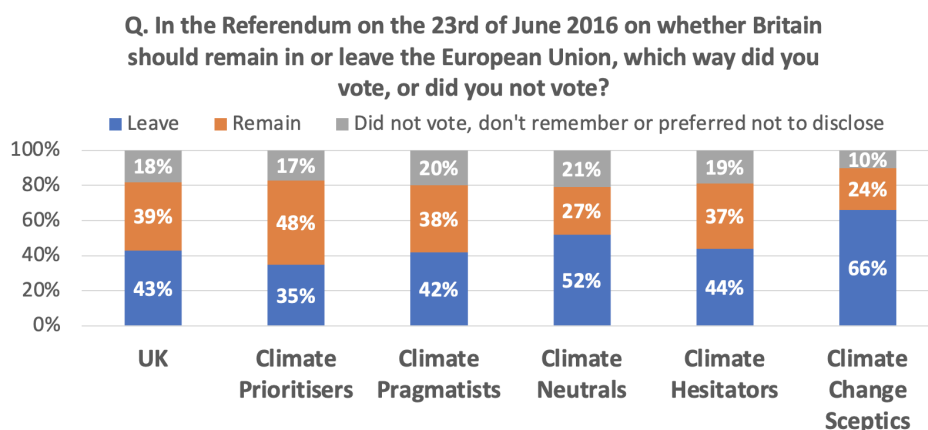
Figure 4: 2019 General Election vote, UK and the Climate Tribes (proportion of group, %).



9. Outputs from the Maxdiff model, see Figure 9 for the full results.

10. The Labour Party (2019). *Labour Party Manifesto 2019* ([Link](#)).

Figure 5. Brexit vote, UK and the Climate Tribes.



Climate Pragmatists (26% of UK adults)

Like Climate Prioritisers, Climate Pragmatists believe climate change is man-made and a threat to society in the present, requiring action by the Government. However, they are more moderate than Radicals in some ways. For instance, they believe the threat of climate change is sometimes exaggerated, and more Pragmatists want to see a gradual response to climate change rather than a radical system overhaul.

Their world view follows a similar pattern. Like Climate Prioritisers, Pragmatists place a premium on climate and environmental policies over other public policy goals. However, they tend to be more receptive to other policies, particularly towards those which are framed as solving climate and environmental issues while also delivering other public policy goals (Table 2).

For instance, out of all the statements we tested in our analysis (Figure 6), Pragmatists were more likely to support a range of non-climate or environmental policies compared to Prioritisers, such as ‘governments prioritising growth, incomes and jobs’ (1.6x more likely), ‘ensuring people are free to do what they want’ (1.6x more likely) and ‘focusing on keeping down the cost of living’ (1.5x more likely).

Indeed, Pragmatists’ policy priorities imply they have a centre-right or centre-left lean depending on the issue. For instance, their support for maintaining personal liberties or taxing people – two traditional elements of a centre-right outlook – appear to vary by the issue in question. While they are pro-banning or taxing single-use plastics, showing support for restricting consumer choice via regulation or taxes on this issue, they strongly oppose forcing people to change their gas boilers or taxing richer countries more to pay for climate change.

Table 2. Top and bottom policy priorities, Climate Pragmatists

Top 5 policy priorities	Bottom 5 policy priorities
1. Developing renewable technologies like wind and solar power to reduce carbon emissions.	1. Protesting about climate change, including breaking the law to make the point.
2. Investing in 'green' industries like electric car manufacturing, to provide sustainable jobs for the future.	2. Encouraging everyone to eat less meat or switch to vegetarian diets.
3. Banning or taxing single-use plastics to avoid polluting oceans.	3. Taxing people in countries like the UK more to address global climate change.
4. Investing in technologies that remove carbon from the atmosphere.	4. Forcing people to change their gas boilers within 10 years to more energy efficient heating systems.
5. Addressing global climate change.	5. Leaving local communities, here and around the world, to manage their own local habitats even if we don't agree with their approach.

Based on the policy priorities produced by the MaxDiff model (Figure 6). Pragmatists are therefore similarly as pro-climate action as Prioritisers, but they appear to judge policies on an individual basis rather than cheerleading any policy by virtue of its green credentials.

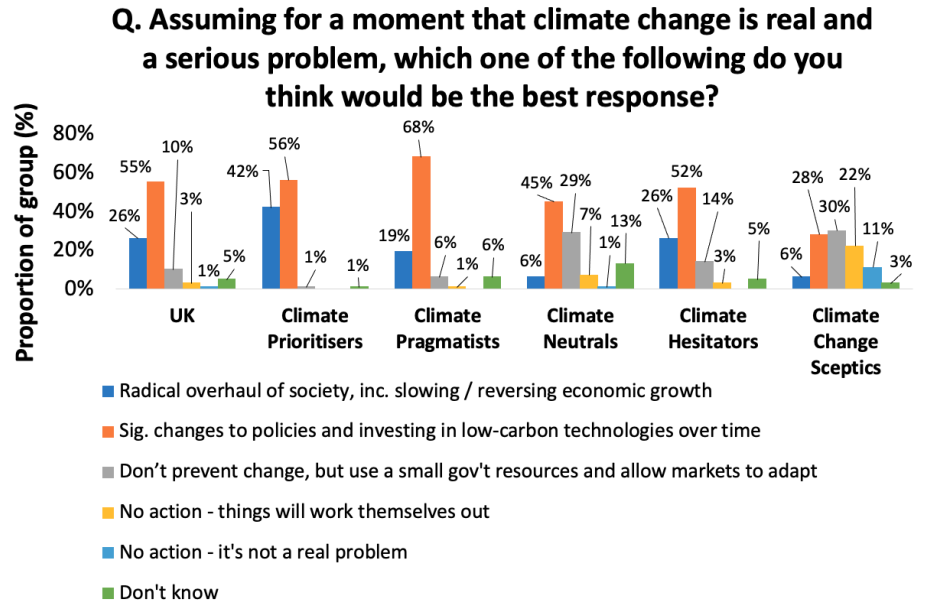
Pragmatists drift towards the other Tribes in their political outlook. For instance, under two-fifths of Prioritisers support a radical transformation of society's growth model to accelerate decarbonisation as the best response to climate change, but this halves to one fifth of Pragmatists. More Pragmatists also support a more moderate response to climate change characterised by significant changes to public policy and green investments over the next few decades (68% vs. 56%) (Figure 7).

Pragmatists are therefore more moderate than Prioritisers on their views of the best response to climate change, despite both groups being strongly pro-climate action in their priorities. Pragmatists also voted for more centre-right parties in the 2019 General Election (Figure 4), and as a block they voted to leave the EU, which politically positions them closer to Neutrals than Prioritisers.

Figure 6. Outputs from the MaxDiff model for the UK and the Climate Tribes. Note: the numbers represent the probability that a group chooses that statement as its top priority.

	UK	Climate Prioritisers	Climate Pragmatists	Climate Neutrals	Climate Hesitators	Climate Change Sceptics
Developing renewable technologies like wind and solar power to reduce carbon emissions	5.15	6.13	5.44	4.05	3.16	3.73
Banning or taxing single-use plastics to avoid polluting the oceans	4.51	5.35	4.49	3.68	3.21	3.49
Investing in 'green' industries like electric car manufacturing, to provide sustainable jobs for the future	4.37	5.13	4.55	3.44	3.27	3.04
Addressing global climate change	4.29	5.64	4.20	2.77	3.02	2.01
Investing in technologies that remove carbon from the atmosphere	4.00	4.51	4.21	3.36	3.01	3.09
Making the government take the leading role in creating and managing low-carbon industries and technologies that experts deem necessary	3.81	4.47	3.98	2.96	2.96	2.51
Focussing on keeping down the cost of living	3.56	2.51	3.88	4.85	3.50	5.77
Making private companies lead the way by developing low-carbon industries and technologies that people want to buy	3.40	3.64	3.51	3.04	3.09	2.89
Investing in industries most likely to create jobs	3.36	2.50	3.68	4.38	3.17	5.33
Developing technologies like nuclear electricity to reduce carbon emissions	3.34	3.19	3.50	3.44	3.07	3.75
Over time, ensuring the government takes action to ensure people switch from things like petrol to electric cars, or gas boilers to greener home heating	3.34	3.85	3.42	2.70	2.91	2.12
Investing mostly in nature-based solutions such as planting trees	3.20	3.36	3.11	3.09	2.98	3.22
Reserving/rewilding more areas of the world for nature, where economic activity is banned	3.20	3.50	3.01	2.88	3.03	3.09
Using new rules to ensure products bought in Britain are made from sustainably managed natural resources	3.10	3.31	3.11	2.82	2.94	2.70
Focussing on restoring habitats here in the UK	2.99	2.84	2.89	3.26	2.92	3.74
Taxing the rich much more to pay for climate-related policies	2.88	3.01	2.81	2.92	2.88	2.30
Investing in more and better public transport	2.87	2.45	3.05	3.22	2.94	3.83
Trying to stop people in countries like Iceland or Japan from hunting whales	2.83	2.78	2.69	3.04	2.99	2.95
Governments prioritising growth, incomes and jobs, not environmental issues	2.82	1.80	2.93	4.06	3.20	5.16
Stopping supermarkets from selling intensively farmed animal products such as non-free range eggs or 'factory farm' beef	2.81	2.99	2.63	2.65	2.92	2.61
Protecting the heritage and appearance of our local landscapes	2.76	2.27	2.77	3.41	2.90	4.00
Getting the government to fund replacing people's gas boilers at home	2.73	2.39	2.73	3.15	3.24	3.02
Using carbon taxes to make it more expensive to manufacture and buy products with higher carbon emissions	2.68	2.98	2.67	2.19	2.82	1.86
Addressing local air quality issues	2.61	2.49	2.64	2.80	2.62	2.76
Using current institutions, like Parliament, to change public policies on climate	2.61	2.81	2.67	2.23	2.54	2.10
Focussing on rewilding parts of the world	2.42	2.53	2.24	2.33	2.51	2.53
Ensuring people are free to do what they want	2.20	1.26	2.01	3.39	2.78	4.82
Creating a new public assembly to decide the UK's approach to climate change	1.75	1.53	1.67	1.94	2.63	1.55
Slowing down economic growth to limit our impact on the environment	1.72	1.62	1.57	1.84	2.50	1.44
Taxing drivers of petrol or diesel cars more over time, to encourage a shift to electric cars	1.68	1.57	1.62	1.72	2.44	1.21
Leaving local communities, here and around the world, to manage their own local habitats even if we don't agree with their approach	1.65	1.11	1.49	2.21	2.58	2.77
Leaving local communities, here and around the world, to manage their own local habitats even if we don't agree with their approach	1.65	1.11	1.49	2.21	2.58	2.77
Forcing people to change their gas boilers within 10 years to more energy efficient heating systems	1.49	1.25	1.42	1.65	2.47	1.27
Taxing people in countries like the UK more to address global climate change	1.42	1.27	1.31	1.57	2.20	1.09
Encouraging everyone to eat less meat or switch to vegetarian diets	1.35	1.18	1.16	1.53	2.35	1.20
Protesting about climate change, including breaking the law to make the point	1.10	0.76	0.97	1.43	2.27	1.03

Figure 7. Best response to climate change, UK and the Climate Tribes.



Climate Neutrals (16% of UK adults)

Climate Neutrals are more relaxed about man-made climate change. They believe it is happening, but they lack strong views on whether it poses a serious problem to society, and many Neutrals entertain the idea that it may be a natural phenomenon.

Neutrals value policies which are framed as delivering economic outcomes. For instance, Neutrals prioritise keeping down the cost of living and growth over any climate or environmental policy included in our analysis (Table 3). This is in direct contrast to Prioritisers and Pragmatists.

Neutrals also appear to have strong centre-right values. For instance, they strongly dislike policies that involve taxing people for environmental purposes. Further, several of their least-valued policies are those that are clearly framed as restricting individual choices, such as forcing people to change their gas boilers.

Our data suggest they are also more community-focused in their priorities, supporting locally-framed issues like protecting local landscapes over globally-framed ones, such as addressing global climate change. These trends are in keeping with Neutrals’ political voting record; they heavily supported centre-right parties in the 2019 General Election (Figure 4), and they voted in favour of leaving the EU by a considerable margin (52% vs. 27%).

Table 3. Top and bottom priorities, Climate Neutrals.

Top 5 policy priorities	Bottom 5 policy priorities
1. Focussing on keeping down the cost of living	1. Protesting about climate change, including breaking the law to make the point
2. Investing in industries most likely to create jobs	2. Encouraging everyone to eat less meat or switch to vegetarian diets
3. Governments prioritising growth, income and jobs, not environmental issues	3. Taxing people in countries like the UK more to address global climate change
4. Developing renewable technologies like wind and solar power to reduce carbon emissions	4. Forcing people to change their gas boilers within 10 years to more energy efficient heating systems
5. Banning or taxing single-use plastics to avoid polluting the oceans	5. Taxing drivers of petrol and diesel cars more over time, to encourage a shift to electric cars

Given their conservative leanings, Neutrals are predictably less in favour of a radical response to climate change. Around a half (45%) think climate change should be addressed through significant changes to public policies and investment in new technologies over the next few decades. However, a significant minority of Neutrals support a less interventionist approach, with around a third (29%) backing a free-market approach as the best response. A further one in 10 Neutrals thinks no policy action is needed on climate change, which is probably due to some Neutrals believing climate change is real but not a serious threat.

Although the differences are not stark, Neutrals are more likely to represent the less well-off sections of society, particularly when compared to the more 'pro-climate action' Tribes (Prioritisers and Pragmatists). For instance, Neutrals tend to be slightly less well off than other Tribes, with more in lower income brackets (earning below £34,000 / year) than other Tribes. They tend to have left formal education slightly earlier than the population average; for instance, they are 5% less likely to have studied to degree level (Figure 8). Compared to the UK average, they are also noticeably more likely to work in manual labour jobs and less likely to work in intermediate or higher managerial roles (Figure 9).

Figure 8. Highest level of education, UK and the Climate Tribes.

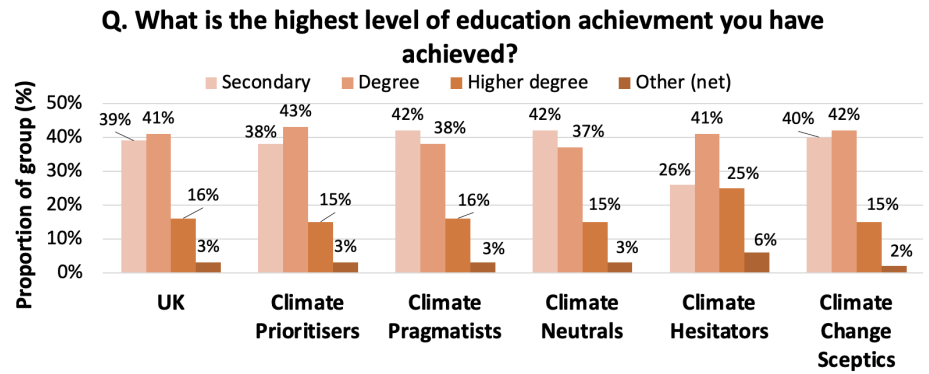
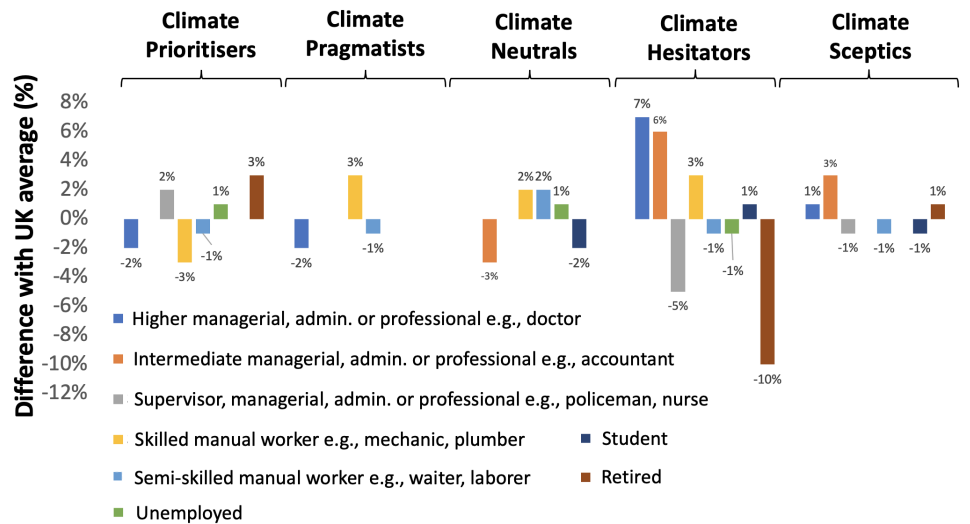


Figure 9. Occupations of the Climate Tribes.



Climate Hesitators (11% of the UK population)

Climate Hesitators are extremely difficult to pin down – they are the archetypal ‘floating voter’ on climate change. This is different to Neutrals, who have clear views on climate change, but these views compete with other priorities such as the economy. Hesitators just don’t appear to have a strong view.

Hesitators tend to believe that climate change is happening and that it is probably a natural phenomenon, but their defining feature is their pliability. When they were asked to rate a range of views on climate change, Hesitators rated all views very highly, regardless of whether they were close to their initial stated view. This could imply they are sceptical of mainstream climate change discourse, but unsure about what climate change is, how much of a threat it poses, and/or what the best response might be.

Hesitators’ plasticity when it comes to views on climate change could be partly explained by their broad value base. Our research suggests they lack strong opinions on a range of public policies which are traditionally

centre-right (e.g., smaller state, lower taxes) or centre-left (e.g. bigger state, higher taxes) (Figure 12). This implies they could be nomadic in their opinions, switching what they value regularly.

This idea is supported by the fact that Hesitators support all climate and environmental policies relatively evenly, apparently lacking strong convictions. Indeed, this is supported by our analysis of Hesitator’s Moral Foundations later in this report. In contrast, other Tribes have clear areas that they support and oppose (Figure 10).

Table 4. Top and bottom policy priorities, Climate Hesitators.

Top 5 policy priorities	Bottom 5 policy priorities
1. Focussing on keeping down the cost of living	1. Taxing people in countries like the UK more to address global climate change
2. Investing in ‘green’ industries like electric car manufacturing to provide sustainable jobs for the future	2. Protesting about climate change, including breaking the law to make the point
3. Getting the government to fund replacing people’s gas boilers at home	3. Encouraging everyone to eat less meat or switch to vegetarian diets
4. Banning or taxing single-use plastics to avoid polluting the oceans	4. Taxing drivers of petrol and diesel cars more over time, to encourage a shift to electric cars
5. Governments prioritising growth, incomes and jobs, not environmental issues	5. Forcing people to change their gas boilers within 10 years to more energy efficient heating systems

Figure 10. Support for general policy areas, UK and the Climate Tribes (average score out of 8).

Q. Generally speaking, how important are the following issues as far as you are concerned? (1 = very important, 8 = not important at all)

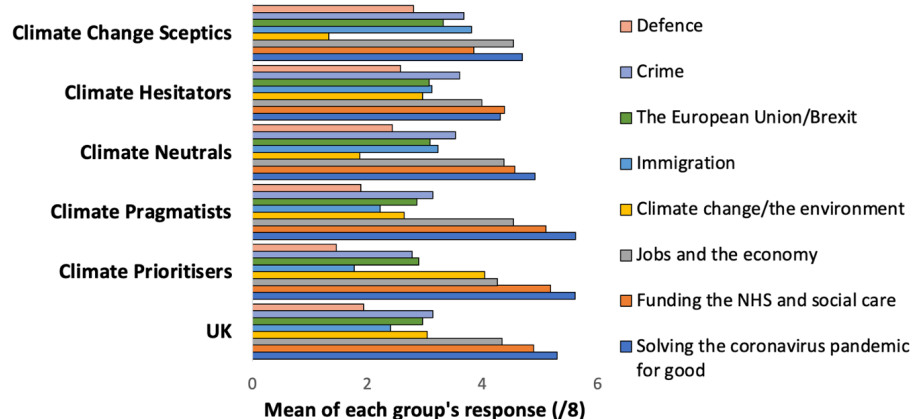


Table: Mean score (green = higher importance, yellow = lower importance)

	UK	Climate Prioritisers	Climate Pragmatists	Climate Neutrals	Climate Hesitators	Climate Change Sceptics
Solving the coronavirus pandemic for good	5.30	5.6	5.6	4.9	4.3	4.7
Funding the NHS and social care	4.89	5.2	5.1	4.6	4.4	3.9
Jobs and the economy	4.34	4.3	4.5	4.4	4.0	4.5
Climate change/the environment	3.04	4.0	2.6	1.9	3.0	1.3
Immigration	2.4	1.8	2.2	3.2	3.1	3.8
The European Union/Brexit	2.96	2.9	2.9	3.1	3.1	3.3
Crime	3.14	2.8	3.1	3.5	3.6	3.7
Defence	1.93	1.5	1.9	2.4	2.6	2.8

Hesitators’ centrist outlook translates into the majority (52%) supporting a moderate response to climate change, driven by changes to public policies and investments in new technologies. Indeed, few Hesitators support a classically ‘left’ or ‘right’ responses to climate change; only five in 20 think climate change demands a radical overhaul of society, while only three in 20 support a free-market, non-interventionist approach. Hesitators are therefore moderate in their views on climate change, albeit with sympathies for a wide range of views.

The other Climate Tribes tend to resemble the UK population closely, but Hesitators are more diverse and more privileged. For instance, Hesitators are much more likely to work in full time jobs compared to the national average (66% vs. 48%), and few are retired (5% vs. 19%).

Hesitators are also ethnically diverse, being much more likely to be Black / Black British, Asian / Asian British or Mixed Race than any other Tribe (Figure 12). They are also younger (Figure 11), more likely to live in urban areas (37% live in towns or cities, while the UK average is 22%), and they tend to be better educated (a third more Hesitators study to Masters level or beyond compared to the national average).

Figure 11. Age pyramids, UK and the Climate Tribes (% of each group).

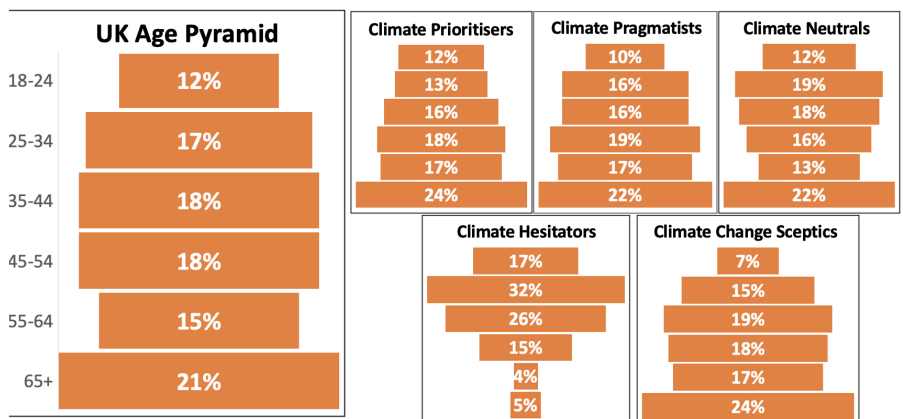
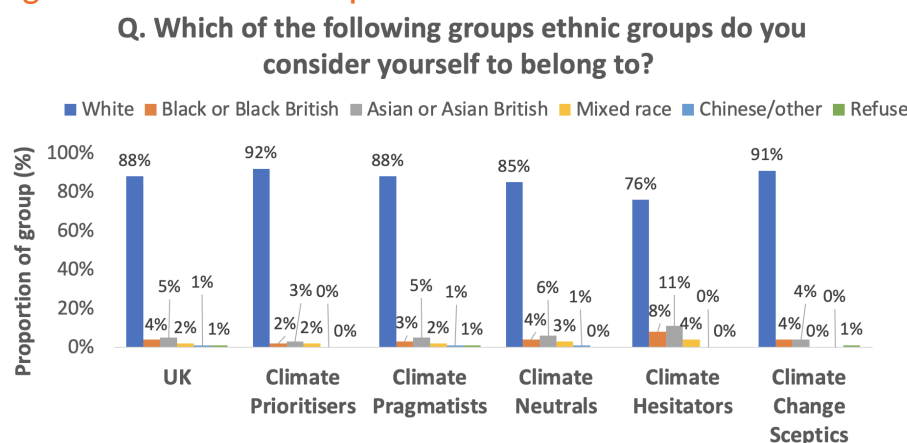


Figure 12: Ethnic make-up of the Climate Tribes.



Climate Change Sceptics

Climate Change Sceptics are the most critical towards the concept of climate change. They tend to believe climate change is not real, and that the mainstream discourse on climate change could be a mistake or a hoax. Some Sceptics are open-minded to the fact climate change could be real, but that it is probably a natural phenomenon, and it is not as big a threat as society thinks.

In keeping with their views on climate, Sceptics tend to value policies which are not focused on the climate or environment (Table 5). For instance, out of the 35 policies included in our analysis, Sceptics clearly prioritised economic and locally-focused policies. All the other Climate Tribes at least included some climate and environmental policies in their top priorities, even Neutrals who are less pro-climate and environmental action.

Table 5. Top and bottom policy priorities, Climate Change Sceptics

Top 5 policy priorities	Bottom 5 policy priorities
1. Focussing on keeping down the cost of living.	1. Protesting about climate change, including breaking the law to make the point.
2. Investing in industries most likely to create jobs.	2. Taxing people in countries like the UK more to address global climate change.
3. Governments prioritising growth, incomes and jobs, not environmental issues.	3. Encouraging everyone to eat less meat or switch to vegetarian diets.
4. Ensuring people are free to do what they want.	4. Taxing drivers of petrol and diesel cars more over time, to encourage a shift to electric cars.
5. Protecting the heritage and appearance of our local landscapes.	5. Forcing people to change their gas boilers within 10 years to more energy efficient heating systems.

Sceptics’ world view is therefore in line with traditional conservative values, and their voting record supports this. As a Tribe, the strongly supported the Conservative Party at the 2019 General Election (Figure 4), and a significant majority voted to leave the European Union (66% vs. 24%). Most of the Tribe’s ideas on the best response to climate change also reflect a centre-right value base: around a third of Sceptics support a non-interventionist approach to climate change, based on free markets, while another third supports doing nothing at all (Figure 7).

Interestingly, a significant minority of Sceptics (28%) support a moderate response to climate change based on tweaking public policies and investing in new technologies over time. It is likely this is due to some Sceptics viewing climate change as a real but overblown and naturally occurring threat, which merits a proportionally moderate response.

Out of all the Climate Tribes, Climate Sceptics are an outlier based on their confident, sceptical stance towards climate change. In contrast, Neutrals and Hesitators, who are also more questioning towards climate change, are more open-minded over the threat it may pose, and what response this threat merits.

However, Sceptics are clear outliers in other ways too. They are more likely to be separated than the UK average, and they tend to be slightly richer, with double the proportion of people earning between £76,000 - £83,000 in their group compared to the UK population. They are almost twice as likely to be male than female compared to the UK average (Figure 14).

Sceptics are also geographically distinct compared to the other Tribes, with much more of the Tribe concentrated outside of London, particularly in Scotland, the East of England and Yorkshire and the Humber (Figure 13).

Figure 13. Geographical distribution, UK population and the Climate Tribes (% of each group that live in each region).

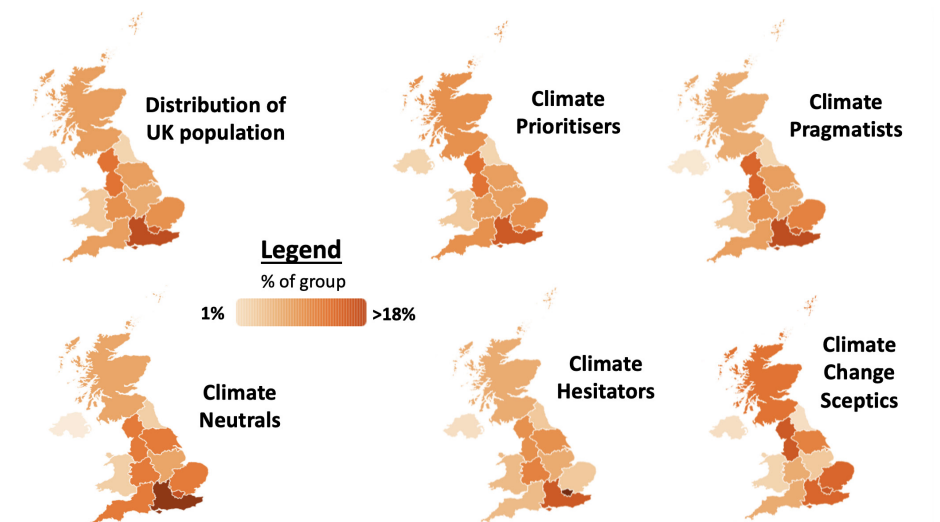
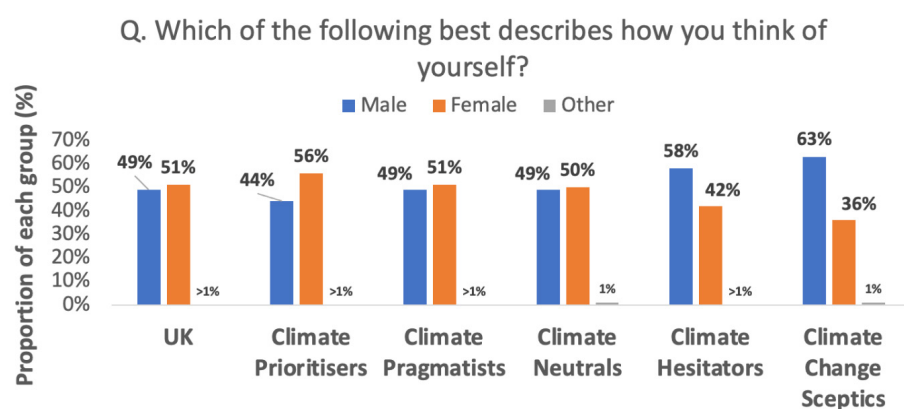


Figure 14. Gender balance, UK and the Climate Tribes.



Although each Climate Tribe is formed based on their shared outlook on climate change, each has its own unique character and profile along factors like geography, age, income and voting intention. Similarly, the Tribe's coalesce and diverge in their support for current and planned climate and environmental policies, which is addressed in the next section.

What are the trends?

Trend 1: Boris Johnson's Ten Point Plan for a Green Industrial Revolution is popular, but the consensus on some issues is weak.

In November 2020, Boris Johnson's government published *The Ten Point Plan for a Green Industrial Revolution* ('The Ten Point Plan'); a strategy for tackling climate change across 10 policy areas. Our polling tested the popularity of the policies within the *Ten Point Plan* (Figure 17) with the British public and its constituent Climate Tribes, though we did not associate the policies with the government in the survey.

Our results show that the public overwhelmingly support the Government's *Ten Point Plan* (Figure 15). Overall, all the policy measures received moderate or strong support; not a single policy was opposed on net terms, and in fourteen of the eighteen policies polled, fewer than 20% of people opposed them. This implies the *Ten Point Plan* is presently politically popular across all its constituent parts, which should be read optimistically, given that even the more controversial elements of the plan (e.g. nuclear) enjoy net support.

Particular areas of the *Ten Point Plan* offer clear political wins (Figure 16). Greening public transport is every Tribe's most popular or second most popular policy. Aside from nuclear, low-carbon energy solutions are popular across the board, particularly wind and hydrogen.

Additionally, we polled two high-level options on the design of a Carbon Border Adjustment Mechanism (CBAM), which is a tax levied on imports based on the carbon emissions associated with their production. One of the options was to reinvest the revenue a CBAM raises into researching and developing green technologies, while the other was to use the revenue to lower domestic taxes. Both options were supported equally strongly by the public (67% vs. 9%), implying that the Government has some political

freedom around the design any future CBAM.

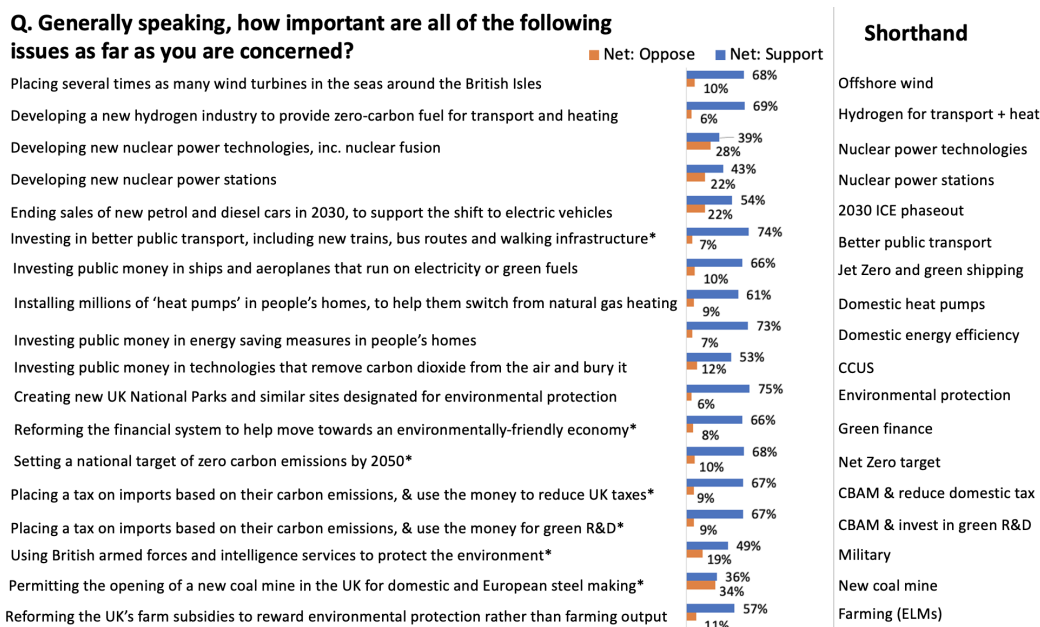
Notably, Policy Exchange has previously argued that recycling revenue to reduce domestic taxes as a ‘carbon dividend’ is the more politically feasible option of the two, given the potential of CBAMs to be economically regressive.¹¹

However, three areas of the Ten Point Plan are less popular and pose political risks for long-term decarbonisation (Figure 16). Encouraging the development of carbon capture, utilisation and storage (CCUS) technologies, the phasing out of new petrol and diesel vehicles, and new nuclear all proved significantly less popular than the other areas of the Ten Point Plan.

Given the risks these areas pose to the political sustainability of the Ten Point Plan, the Government should think strategically about how policies in these areas are announced (e.g. slowly building up to large policy announcements), when they are announced (e.g. avoiding announcing several policies at once that are unlikely to be popular) and what is announced (e.g. ensuring policies appeal to Tribe’s Moral Foundations).

An interesting outlier here is Climate Sceptics’ support for nuclear, which was their most popular area of the Ten Point Plan while being the least popular area for every other Tribe. This implies Sceptics support new nuclear for non-climate related reasons, such as for its potential to enhance energy security by providing baseload power.

Figure 15. Popularity of different climate and environmental policies.



11. Matt Rooney et al (2018). *The Future of Carbon Pricing: Implementing an independent carbon tax with dividends in the UK* ([Link](#)).

Figure 16. Popularity of each area in the Ten Point Plan, UK and the Climate Tribes.

Q. Generally speaking, how important are all of the following issues as far as you are concerned? (/5, where 1 = Not important at all, and 5 = very important).

10 point plan	UK average	Climate Prioritisers	Climate Pragmatists	Climate Neutrals	Climate Hesitators	Climate Sceptics
Green public transport	4.0	4.4	4.0	3.5	3.9	3.3
Hydrogen	4.0	4.3	3.9	3.4	3.8	3.3
Wind	3.9	4.3	3.9	3.3	3.8	3.0
Greener buildings*	3.9	4.2	3.9	3.4	3.8	3.1
Natural Environment*	3.9	4.3	3.8	3.3	3.8	3.1
Green finance and innovation	3.8	4.3	3.8	3.3	3.8	2.8
Jet zero and green ships	3.8	4.2	3.8	3.3	3.8	2.9
CCUS	3.6	3.8	3.7	3.2	3.7	2.9
ZEVs (banning petrol / diesel vehicles)	3.5	3.9	3.4	2.9	3.7	2.2
Nuclear*	3.2	3.0	3.2	3.2	3.7	3.4
Average for group	3.8	4.1	3.7	3.3	3.8	3.0

* The results of two or more questions are aggregated here under one theme. For instance, under Nuclear, the results presented here are the aggregated results for investing in new nuclear power stations and new nuclear technologies like nuclear fusion.

Figure 17. How the polled policies reflect the Ten Point Plan,

10 Point Plan	Polled question(s): To what extent do you support or oppose...
1 Advancing Offshore Wind	<ul style="list-style-type: none"> Placing several times as many wind turbines in the seas around the British Isles
2 Delivering the Growth of Low Carbon Hydrogen	<ul style="list-style-type: none"> Developing a new hydrogen industry, to provide zero-carbon fuel for transport and heating
3 Delivering New and Advanced Nuclear Power	<ul style="list-style-type: none"> Developing new nuclear power stations Developing new nuclear power technologies, including nuclear fusion
4 Accelerating the Shift to Zero Emission Vehicles	<ul style="list-style-type: none"> Ending the sale of new petrol and diesel cars in 2030, to support the shift to electric vehicles
5 Green Public Transport, Cycling and Walking	<ul style="list-style-type: none"> Investing in better public transport, including new trains, bus routes, cycling and pedestrian infrastructure
6 Jet Zero and Green Ships	<ul style="list-style-type: none"> Investing public money in ships and aeroplanes that run on electricity or green fuels
7 Greener Buildings	<ul style="list-style-type: none"> Installing millions of 'heat pumps' in people's homes, to help them switch from natural gas heating
8 Investing in Carbon, Capture, Usage and Storage	<ul style="list-style-type: none"> Investing public money in technologies that remove carbon dioxide from the air and bury it underground
9 Protecting Our Natural Environment	<ul style="list-style-type: none"> Creating new UK national parks and similar sites designated for environmental protection
10 Green Finance and Innovation	<ul style="list-style-type: none"> Reforming the financial system so that it supports the move towards an environmentally-friendly economy

Overall, our data suggests several areas of the Ten Point Plan are on the precipice of net opposition, particularly nuclear energy. These policy

areas require careful design to ensure political support. Most of the British public think positively about the Government’s environmental credentials compared to other large economies (Figure 18) or past UK governments (Figure 19); 45% think that the UK Government is at least ‘somewhat better’ at protecting the environment than other large economies, and 40% think that the Government has stronger environmental credentials than past UK Governments.

Figure 18. Opinions on the UK Government’s progress on protecting the environment compared to other big economies, UK and the Climate Tribes (proportion of group, %).

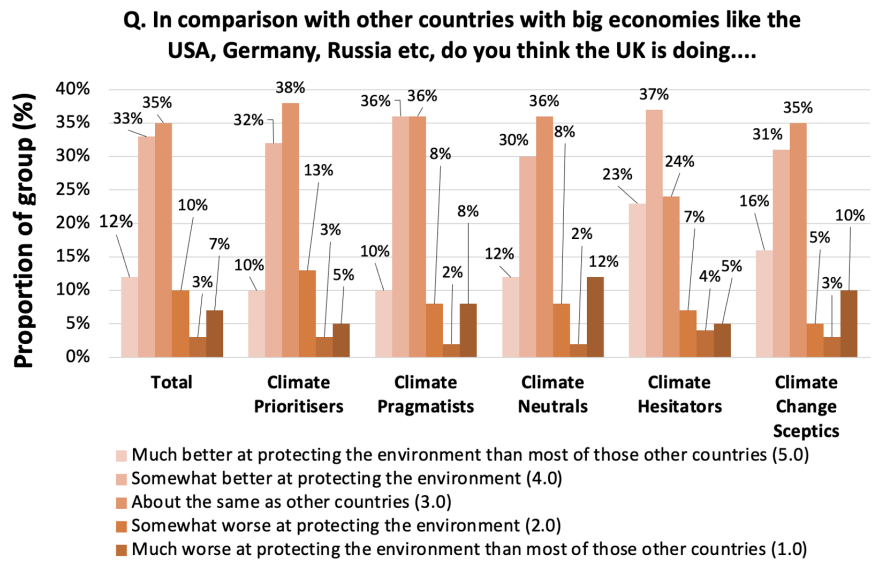
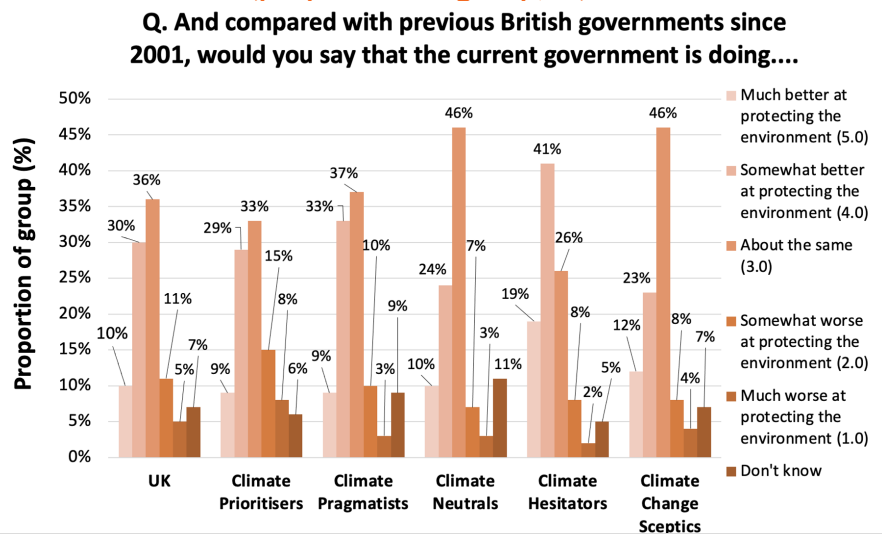


Figure 19. Opinions on the UK Government’s progress on protecting the environment compared to previous UK governments, UK and the Climate Tribes (proportion of group, %).



Trend 2: Policies that work with markets attract the greatest support.

When policies intervene in markets to achieve public policy goals, they can either intervene to work with markets, increasing their efficiency to work towards public policy goals, or they can more bluntly intervene to block or alter how markets operate, to prevent them generating undesirable outcomes.

Our analysis shows that the public values climate and environmental policies that work with markets. This can be seen through the public and most of the Climate Tribes prioritising policies which promote ‘green’ economic growth over general economic growth. For instance, supporting private sector research and development is more popular with the UK public than investing in any industry. It is clear that policies which mobilise markets to provide private sector expertise and capital for decarbonisation are popular. For instance, using regulation to ensure products are sustainably sourced were similarly popular across the Climate Tribes.

Interestingly though, policies which were framed as the Government taking a leading role in decarbonisation were also commonly prioritised. For instance, ‘making the government take a leading role in creating and managing low-carbon industries and technologies’ was the third most popular policy included in our analysis, particularly among the more pro-climate action Tribes who make up most of the British public. This implies that the public support blunter interventions in markets by the Government in some green policy areas, such as direct regulation of markets to prevent unintended outcomes.

The combination of support for Government-led decarbonisation and policy interventions that work with markets suggests that policies where the Government intervenes to re-orientate markets towards green ends are politically popular. However, our data suggest there are areas where blunter interventions are popular, including banning single-use plastics and, rather more dramatically, using the intelligence services and the military to protect the environment.

Trend 3: Policies that limit consumer choice are among the least popular.

Several of the policies included in our analysis were framed as imposing on consumer choices, and these policies were among the least popular with the public. Policies which involved visible changes to consumer lifestyles were particularly unpopular. For instance, taxing drivers of petrol and diesel cars more over time to encourage them to switch to electric vehicles was the 6th least popular policy.

Notably, Policy Exchange has proposed an alternative, a Zero-Emission Vehicle mandate, that apply regulation on manufacturers rather than focusing taxing consumers directly.¹² The Government has since announced plans to introduce a Zero-Emission Vehicle mandate.¹³

Similarly, forcing people to change their gas boilers to alternatives was

13. Department for Transport (July 2021). CO2 emissions regulatory framework for new heavy-duty vehicles in the UK. [Link](#).
 12. Policy Exchange (June 2020). *Route 33: How a California-style ZEV Mandate can deliver the phase-out of petrol and diesel cars.* [Link](#).

the 4th least popular option. This trend was the same across all the Climate Tribes. In the recently-published *Heat and Buildings Strategy*, the Government did not include a firm end date for the sale of new gas boilers. Instead, the Government announced an “ambition” to “phase out the installation of natural gas boilers beyond 2035”.¹⁴

Our data suggest that consumers may be more concerned with the specific good or service a policy is limiting, rather than the fact it is limiting it *per se*. In contrast to the deep opposition to policies which target a consumer’s use of petrol and diesel cars and gas boilers, the banning or taxing of single-use plastics was the second most popular policy.

Some consumer habits, and the policies which target them, are therefore potential live wires for the Government. Additionally, the unpopularity of these policies is universal; Prioritisers dislike the idea of taxing petrol and diesel car drivers and forcing people to change gas boilers as much as Sceptics.

Trend 4: The public want evolution not revolution.

A quarter of the UK population stated in our polling that a radical overhaul of society, involving the slowing or reversing of economic growth, is the best response to climate change (Figure 7). Most of these are Climate Prioritisers, with negligible numbers sprinkled across the rest of the Climate Tribes.

However, our MaxDiff model suggests that a contradiction exists between this group’s stated views and their preferred views on the best response to climate change. When people are confronted with the policies of such a sudden and degrowth transition, they do not support them. For instance, slowing down economic growth to limit our impact on the environment was unpopular with all the Tribes, as were policies forcing a very short-term change apart from on standalone issues like single-use plastics. In comparison, policies which promoted ‘green growth’ tended to be popular across all the Tribes.

Additionally, one of the strongest messages from our polling was that climate and environmental policies should respect law and order; The statement ‘protesting about climate change, including breaking the law to make the point’ was the least popular one out of all 35 included in our analysis.

While a quarter of the UK population state that they want a radical transition, the vast majority do not support the radical policies which have been associated with such a shift. The implication of this is that the Government is politically safe in promoting a determined-but-steady, investment-led transition to Net Zero. This is because half the UK public already support this as the best response to climate change, and the quarter that want to see a more radical response are unlikely to support the reality of the policies it entails.

Indeed, our results suggest the public are also more interested in seeing strong government leadership than questions of alternative political institutions. For instance, the top five policies all involve government-

14. Department for Business, Energy & Industrial Strategy (October 2021). *Heat and Buildings Strategy*. [Link](#). Page 8.

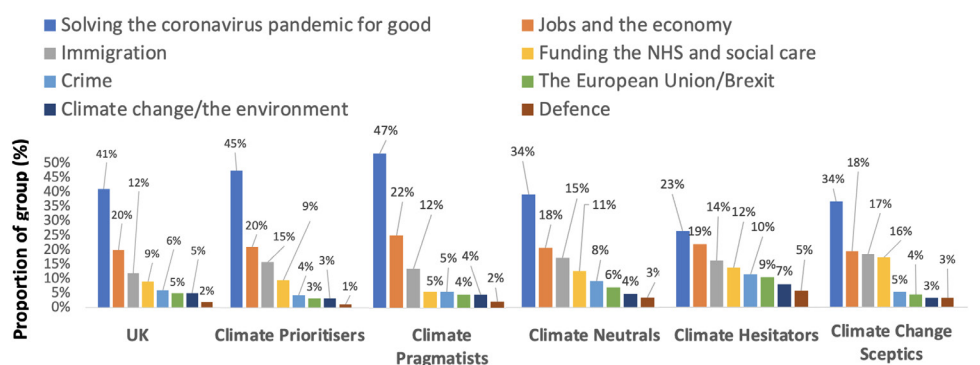
led investment or clear policies. In contrast, there was less of an appetite for alternative institutional or political set-ups to lead decarbonisation; establishing a new climate assembly to decide the UK's approach to climate change' was unpopular across all the Climate Tribes.

While changing climate policies through existing institutions like Parliament was much more popular than creating a new Climate Assembly, neither was a main concern for public. Paired with the fact that the UK public reject a radical overhaul of society, this implies that most of the public want decarbonisation to be an evolutionary rather than revolutionary process that is visibly being driven by clear government leadership.

Indeed, climate change and the environment were among every Tribe's bottom priorities when it came to the most important policy issues at the time the polling was conducted, such as overcoming the coronavirus pandemic, jobs and the economy and Brexit (Figure 20).

Figure 20. Top rank policy issues, UK and the Climate Tribes.

Q. Generally speaking, how important are all of the following issues as far as you are concerned? (top rank)



Trend 5: Where you live indicates your priorities, although there is no difference between Red Wall and Non-Red Wall areas.

There are clear policies which attract universal support and opposition, regardless of where someone lives. Broadly, policies that visibly place costs on consumers and involve breaking law and order attract opposition, while the public overwhelmingly supports certain technological solutions like renewables.

However, a trend clearly present on a regional level is support for locally framed environmental policies, such as protecting local heritage landscapes. Londoners buck this trend by prioritising international policies over local policies, such as 'addressing global climate change' over protecting local heritage landscapes. Londoners are also more likely to be concerned with climate issues over environmental, which is likely explained by climate change's global nature next to the local character of many environmental issues.

Interestingly, 'Red Wall' and 'Non-Red Wall' constituencies – referring

to areas in which the Conservatives overturned traditionally Labour-held seats in the 2019 General Election – proved very similar on climate and environmental issues. Both areas also had similar values on economic and localist issues, suggesting that the kinds of issues people from either area value are not all that different.

Our data also suggest that new nuclear is a live wire issue in certain areas. For most regions, new nuclear was around the 10th priority out of 35 policies included in our analysis, but this broad support dropped substantially for people living in Northern Ireland (22nd place) and to a lesser extent for people living in the East of England (20th place). Some technological solutions are therefore locally divisive. In contrast, renewable technologies like wind and solar, as well as CCUS, receive a broader base of support.

There are some concerns which are particularly strong for those from the Devolved Administrations versus England, particularly Northern Ireland and Scotland. For instance, both regions are much more likely to prioritise policies which focus on keeping the cost of living down, such as the government paying for gas boiler replacements rather than forcing people to fund replacements themselves.

Further, both regions are much more likely to prioritise policies which tax wealthier households to pay for climate and environmental issues. Interestingly, the South East is also an outlier among UK regions in its support for taxing the rich to pay for decarbonisation, despite being one of the wealthiest areas of the UK.

Regions also have outlooks which buck national trends and are unique to them. For instance, people from the South West are surprisingly more opposed to green growth policies and narratives, despite their high prioritisation on a UK level. An intriguing outlier is Northern Ireland's support for the UK using its diplomatic, military and intelligence assets to intervene abroad for climate and environmental reasons, such as trying to stop other countries whaling.

Trend 6: Who you voted for in the 2019 General Election indicates your policy priorities.

In this section, we group people by the party they voted for in the 2019 General Election.

Some parties think about climate and environmental policies in predictable ways, such as the Brexit Party, who are very unlikely to prioritise using carbon taxes to re-price products based on their carbon emissions. The Liberal Democrats and the Greens support carbon taxes the most, and by a long way compared to other parties; the Conservatives, Labour and Devolved Nations parties are all similarly unlikely to prioritise carbon taxes. This suggests that carbon taxes are not the preserve of pro-market political groups but have a mixed base of support.

Political parties are more predictable on the question of who should pay for decarbonisation. Centre-left parties, including Labour and the Greens, are far more likely to support taxing wealthier households more to fund

decarbonisation. Conservative voters are more in favour of supporting the private sector to do the heavy lifting when it comes to climate and the environment, rather than relying on the public purse.

Notably, all political groupings are strongly against policies which frame the consumer as paying for decarbonisation. This presents a challenge for consumption-focused carbon taxes (including Carbon Border Adjustment Mechanisms).

Ultimately, the public will pay for the cost for decarbonisation, either through the public purse or through price increases, but policies which involve consumers paying implicitly (e.g. through price increases or through policies focused on the polluter) are more popular.

For instance, in our analysis policies which explicitly frame the consumer as paying upfront, such as directly taxing petrol and diesel cars, were less popular than those which frame the cost of decarbonisation as being initially borne or reduced by other groups, such as the private sector.

The most significant outliers in our analysis among all the parties are the Brexit Party and UK Independence Party (UKIP), who share many political ideals. Both groups value policies significantly differently to the rest of the UK on certain issues. They deeply value policies protecting local habitats over global climate change.

While other parties also follow this trend, particularly the Conservatives and the Greens, the Brexit Party and UKIP value localism much more intensely. Our data also suggest they tend to prioritise the environment over the climate, given their strong preferences for protecting local environments and for nature-based solutions to climate change over technological solutions. Those that voted Leave in the Brexit vote closely resembled voters for the Brexit Party and UKIP.

Most technological solutions receive similar levels of support across the parties, but nuclear is more divisive, appearing to vary by the size of the political group. The Conservatives, Labour and Liberal Democrats – the three main parties – are evenly likely to support new nuclear. Smaller parties, such as the Greens, UKIP, and the Devolved Nations parties, are all much more likely to oppose nuclear.

Nuclear energy is a particularly interesting case in our analysis. Based on our polling, it attracts criticism nationally, but it is more popular than this discourse projects; some regions and voters are much more likely to prioritise nuclear than our overall polling suggests.

Box 1. An emerging trend: Anywheres and Somewheres

Another emerging trend apparent in our data is that the Climate Tribes and their priorities reflect David Goodhart's work on 'Anywheres' and 'Somewheres', as set out in his book, *A Road to Somewhere*.¹⁵

Goodhart describes *Somewheres* as those people who tend to be grounded in smaller communities, staying close to their place of upbringing throughout their life. They pursue careers within that region, generally leave formal or academic education at an earlier age, in favour of work or apprenticeships, and develop applied, manual or care-based skillsets. They tend to form an identity and set of values closely related to their local community. *Somewheres* appear to make up most of the UK population. Their politics is often 'small-C conservative', though this does not necessarily mean voting for the Conservative Party.

In contrast, *Anywheres* tend to go to university, move to metropolitan centres (especially London) and often spend parts of the career working abroad. They thrive in a knowledge-based economy of lawyers, accountants, marketing, software and sales. They are generally more internationalist and their world views tend to be more aligned to classical liberalism. Again, this could mean voting for a Blairite or Starmer-led Labour Party, but it may also mean Cameron's Conservatives or the Liberal Democrats.

Broadly, Goodhart argues that Western societies have become increasingly geared to favour *Anywheres* (described as 'the exam passing classes' after Vernon Bogdanor) over *Somewheres*, which has contributed to backlashes. Brexit and support for the Johnson Government in the 'red wall' is indicative of this phenomenon.

Environmental Anywheres and Somewheres

Our analysis suggests the Climate Tribes share these patterns.

On the one hand, Climate Change Sceptics and Climate Neutrals share much in common with *Somewheres*. Out of the policies we tested, they are far more likely to prioritise local over global issues, and observable environmental issues over specifically climate-related issues. They are also far more concerned with economic issues, such as keeping down the cost of living, which are close to the concerns of *Somewheres* who have experienced a gradual economic decline relative to *Anywheres*.

On the other hand, Climate Prioritisers and Pragmatists are similar to Goodhart's idea of *Anywheres*. They tend to prioritise global over local concerns compared to other Tribes, as well as the climate over environmental issues.

The comparison is not exact; for instance, while Neutrals achieve lower levels of highest educational attainment than the UK average, Sceptics tend to be highly educated. There is also a subtle difference between Liberal and Libertarian that our polling could not dissect. For example, Sceptics and Neutrals tended to prioritise people being free to do what they want compared to Pragmatists and Prioritisers, a sign they may be more traditionally liberal on environmental and climate issues than would be expected of *Anywheres*. However, this may be more of a libertarian trait than a classical liberal one. In our 'Moral Foundations' analysis (see below), there is a clear 'laissez faire' tendency among Climate Sceptics.

However, clear commonalities exist, which signal that the Climate Tribes are similar to *Somewheres* and *Anywheres*. To understand the underlying motivations of these groups, we applied a sociological theory known as Moral Foundations Theory, which is explored in the next section.

15. David Goodhart (March 2017). *The Road to Somewhere: The Populist Revolt and the Future of British Politics*. Hurst & Company.

5. Moral Priorities

Climate change is a long-term problem, demanding long-term solutions. The political sustainability of a policy framework will mean appealing to a more fundamental set of values rather than policies that appear fashionable in the moment. To explore these, we applied a sociological framework known as Moral Foundations Theory (MFT), as outlined earlier in the Methodology section.

MFT and Attitudes to Climate Change

MFT can help explain the outlook of each Climate Tribe at a more fundamental level than asking about individual policies, because it taps into the underlying reasons for liking one policy approach more or less than another. Understanding at this level contributes to political sustainability because it reflects more fundamental values.

Each Tribe has a different set of Moral Foundations which help explain how they see the world and why they think about climate change in a particular way. While polling data provide a snapshot of how each Climate Tribe thinks in the present, Moral Foundations can provide an idea of how they might think over a longer timeframe. Long-term climate policies should therefore pay attention to Moral Foundations; they act as a window through which the political sustainability of climate policies can be gauged.

Our analysis tested the Moral Foundations of each Climate Tribe by asking respondents to rate a series of statements across seven Moral Foundations for their moral repulsiveness (0 = totally morally repulsive, 10 = morally acceptable). These statements were usually unrelated to climate change (though some were), covering hypothetical scenarios ranging from urinating on a person's grave to insulting a community leader.

Each scenario was designed to focus on a particular moral foundation, as outlined in the list above. Each respondent was then categorised as having a high to low moral sensitivity to each Moral Foundation, and the results aggregated to provide an idea of the Moral Foundations of each Climate Tribe.

By comparing each Tribe's Moral Foundations with their policy priorities (produced by our MaxDiff model), we can paint a portrait of why each Climate Tribe supports the policies they do. This has implications for which policies are likely to be politically sustainable out to 2050.

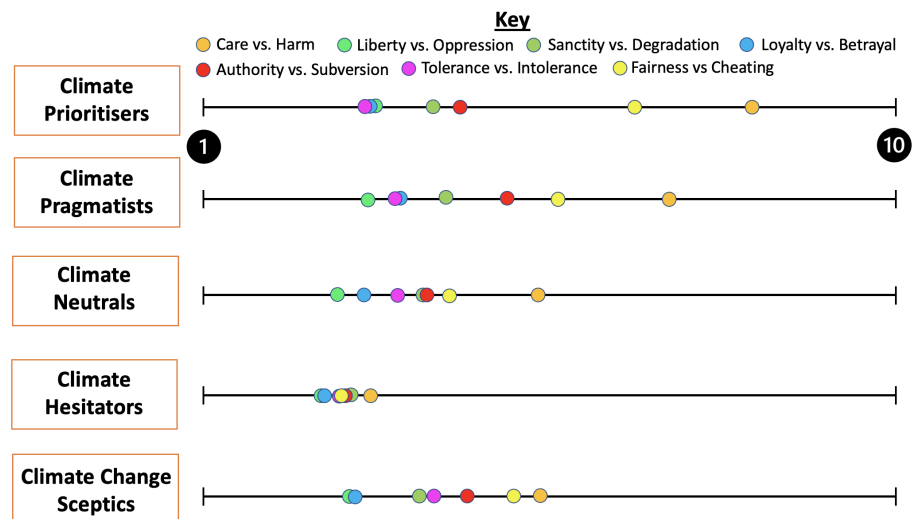
Moral Foundations of the Climate Tribes

Each Climate Tribe has a different set of Moral Foundations. Some are driven strongly by particular Foundations, while others have more evenly distributed, less pronounced distributions – a phenomenon identified by Haidt in his own work on political groupings in the USA.

Our survey used the level of moral repulsion a respondent holds to a scenario as a proxy for sensitivity to each Moral Foundation. The more repulsed a person is to a scenario associated with a particular Moral Foundation, the more that foundation colours the lens through which they see the world (Figure 21). Climate Prioritisers, for instance, are driven strongly by issues framed as Care vs. Harm, whereas Climate Hesitators do not show an articulated sensitivity to any of the Moral Foundations we tested – generally they appear to have a lower sensitivity across the board.

Figure 21. Heat map of the Climate Tribes Moral Foundations (% indicator for moral repulsion; green = more repulsed by a Moral Foundation, red = less repulsed).

	Climate Prioritisers	Climate Pragmatists	Climate Neutrals	Climate Hesitators	Climate Sceptics
Sanctity vs. Degradation	39%	43%	34%	23%	32%
Tolerance vs. Intolerance	25%	30%	30%	20%	34%
Authority vs. Subversion	43%	47%	35%	21%	37%
Loyalty vs. Betrayal	24%	30%	25%	17%	26%
Fairness vs. Cheating	60%	55%	41%	21%	46%
Care vs. Harm	82%	70%	50%	28%	51%
Liberty vs. Oppression	26%	24%	19%	17%	25%

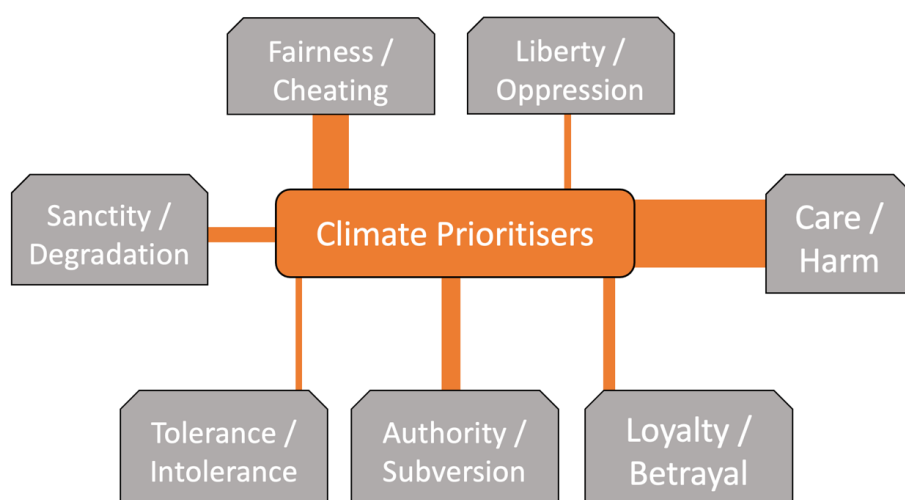


Climate Prioritisers

The pronounced moral sensitivity of Climate Prioritisers to Care vs. Harm and Fairness vs. Cheating implies that they should strongly support climate action, because climate change can be easily associated with the notion of harm caused to the planet, wildlife and humans (Figure 22). Based on our MaxDiff model, Climate Prioritisers overwhelmingly prioritise

climate and environmental policies over other concerns like focusing on economic growth (Table 1). Their policy priorities therefore appear to agree with their Moral Foundations.

Figure 22. Spider diagram of the Moral Foundations of Climate Prioritisers. Note: The thickness of the bars represents how morally repulsed each Tribe is by a Moral Foundation.



Prioritisers are significantly more likely to prioritise technological solutions to climate change over other options like nature restoration. For instance, out of the 35 policy statements we tested, Prioritisers were more likely to choose five technical solutions to climate change, ranging from developing renewables to CCUS technologies, over an environmentally focused policy.

As a group, they are over twice as likely to choose ‘developing renewable technologies like wind and solar power to reduce carbon emissions’ than ‘focussing on restoring habitats here in the UK’. This does not mean they oppose nature-based solutions to climate change. As our earlier polling showed, they strongly support most climate policies, but they lend the most support to technological solutions.

Prioritisers also tend to be more global in their priorities. For instance, they prioritise ‘addressing global climate change’ over more local-scale issues like ‘protecting the heritage and appearance of our local landscapes’ and ‘addressing local air quality issues’.

Prioritisers appear to favour interventionist policies over non-interventionist policies. For instance, out of all the Tribes, there were the least likely to prioritise several non-interventionist and free market policies, such as ensuring people are free to do what they want and leaving local communities [...] to manage their own local habitats. They were also more likely to support highly interventionist policies than other Tribes, such as banning or taxing single-use plastics to avoid polluting the oceans and making private companies lead the way by developing low-carbon industries and technologies that people want to buy. These apparent centre-left preferences are further supported by the fact Prioritisers generally

voted for centre-left parties in the 2019 General Election (Figure 4).

Interestingly, some policies that we would expect Prioritisers to support on account of their centre-left outlook remained unpopular with them. For instance, they were the second least likely of all the Tribes to prioritise *taxing people in countries like the UK more to address global climate change*. However, these policies tended to be unpopular with *all* the Climate Tribes, and this mixed result is therefore not a contradiction between Prioritisers' policy priorities and their political views.

Politically, ClimatePrioritisers are the least risky Tribe for decarbonisation. Their Moral Foundations imply they are likely to strongly support climate and environmental action, driven by their sensitivity to Care vs. Harm and Fairness vs. Cheating. In terms of specific policy mechanisms, they are more likely to support most climate and environmental policies than other Tribes, with a slight preference for technological and interventionist solutions.

This provides two insights into the political sustainability of decarbonisation:

First, Prioritisers are likely to support most climate policy interventions, implying that 40% of the UK adult population will be reliable supporters of decarbonisation. Further, their support is reliable over the long-term because it is underpinned by their Moral Foundations.

Notably, with this support comes the risk of focusing too much on climate and environmental priorities at the expense of other indispensable public goals. For instance, Prioritisers were over twice as likely to prioritise four climate and environment policies - *developing renewable technologies, addressing global climate change, banning or taxing single-use plastics and investing in 'green' industries* - than focussing on *keeping down the cost of living*. This is particularly a risk for the common priorities of other Tribes, because they could get subsumed by the views of Prioritisers who are a larger, and therefore possibly louder, Climate Tribe.

Second, although Prioritisers did not prioritise some policies, these tended to be policies that were unpopular with all the Climate Tribes. This suggests that, although Prioritisers will support most policies, with a preference for interventionist and technological ones, some policies are politically risky across all the Tribes.

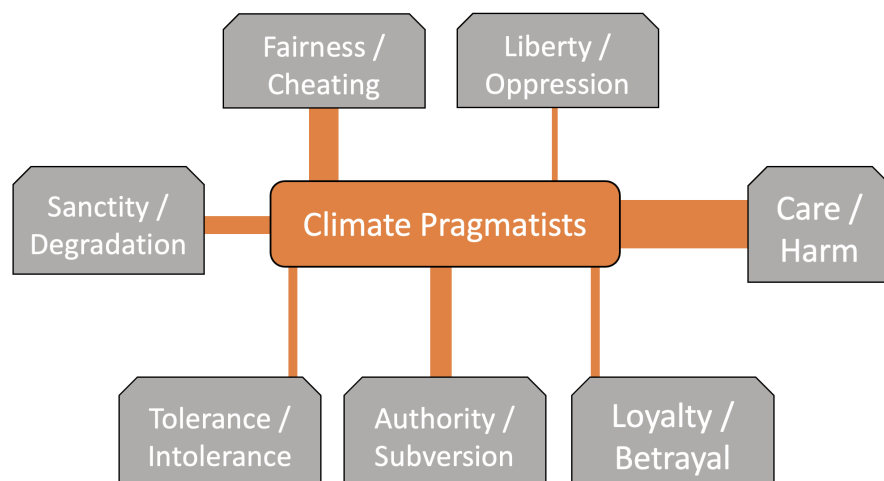
For instance, *forcing people to change their gas boilers* was consistently one of the least popular policies, even with Tribes that did not particularly hold liberal values like *ensuring people are free to do as they want*. Some climate policies could therefore act as 'vote losers' for political parties, regardless of the Tribe in question. This suggests that if these policies are implemented, they could undermine the general political sustainability of decarbonisation. Fortunately, most of these policies are already known to be controversial.

Climate Pragmatists

The Moral Foundations of Climate Pragmatists closely match those of Climate Prioritisers. Although they are sensitive to Care vs. Harm and Fairness vs. Cheating, they are not as sensitive to these Foundations as

Prioritisers (Figure 23). This is reflected in the two Tribe's similar but slightly differing policy priorities (Table 1 vs. Table 2). For instance, Pragmatists are more likely than Prioritisers to prioritise investing in 'green' industries to provide sustainable jobs, and less likely to prioritise addressing global climate change.

Figure 23. Spider diagram of the Moral Foundations of Climate Pragmatists.



Source: Policy Exchange analysis of polling results.

Pragmatists are also more open to prioritising non-climate economic priorities (i.e., achieving growth or jobs by investing in 'non-green' industries) than Prioritisers. For instance, Pragmatists are much more likely than Prioritisers to prioritise a number of economic and liberal goals, such as *Focussing on keeping down the cost of living* (3.8 vs. 2.5), *Ensuring people are free to do what they want* (2.0 vs. 1.3) and *Governments prioritising growth, incomes and jobs, not environmental issues* (2.9 vs. 1.8).¹⁶ While Pragmatists also tended to prioritise global over local policies, they were slightly more sympathetic to local policies than Prioritisers.

The policy priorities of Pragmatists therefore reflect their Moral Foundations: like Prioritisers, Pragmatists are highly 'pro-climate action', but they are more sympathetic to other priorities, reflecting their lower moral sensitivity to Care vs. Harm and Fairness vs. Cheating.

Given their similarity, Pragmatists could present similar political risks to Prioritisers for long-term decarbonisation. However, Pragmatists could also act as a 'pro-climate action' political counterweight to the Prioritisers, because of their pro-climate action stance combined with their open-mindedness to the non-climate demands of public policy.

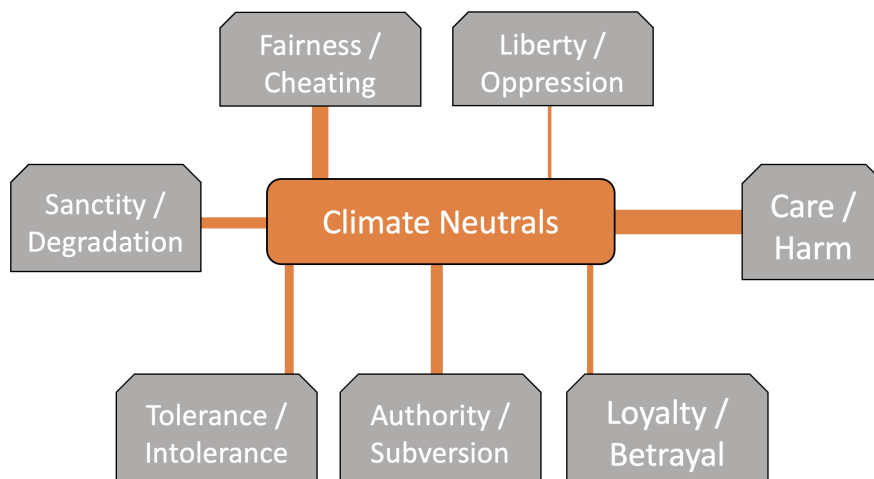
Climate Neutrals

Neutrals are less morally sensitive to most of the Moral Foundations when compared to Prioritisers and Pragmatists, implying they are less morally sensitive to Care vs. Harm and Fairness vs. Cheating (Figure 24). Their

16. These numbers reflect the probability that a Tribe would choose a specific statement out of all 35 as their priority; See Appendix, Table 5.

policy priorities reflect this difference by firmly putting non-climate economic outcomes (i.e., not achieved through investing in ‘green’ industries) ahead of climate and environmental policies.

Figure 24. Spider diagram of the Moral Foundations of Climate Neutrals.



Source: Policy Exchange analysis of polling results.

Traditionally centre-right priorities were also much more likely to be chosen as a priority by Neutrals relative to Pragmatists and Prioritisers. For instance, Neutrals were over twice as likely as Prioritisers to prioritise ensuring people are free to do what they want to (3.4 vs. 1.3), and they generally supported local and non-climate economic priorities more strongly (Table 3). This possibly implies that, due to their lower sensitivity to moral issues, Neutrals prioritise policies that better themselves and their local contexts.

Politically, Neutrals present a political balancing act for long-term decarbonisation on three fronts: economic, local and philosophical.

First, as a group they prioritise non-climate economic outcomes over most climate and environmental policies, but they are still highly likely to support some climate and environmental policies, notably technologies solutions. Some decarbonisation policies are therefore likely to command the support of Neutrals, but they need to tick multiple boxes by also delivering on their economic priorities. This is further supported by Neutrals’ up by their Moral Foundations. Overall, they are less sensitive to Care vs. Harm and Fairness vs. Cheating than Prioritisers or Pragmatists, implying they are less morally driven by climate change, but they are still more sensitive to Care vs. Harm and Fairness vs. Cheating than other Moral Foundations. This implies that, for Neutrals, their political support for decarbonisation rests on delivering economic outcomes through climate policies.

Second, Neutrals are more likely than other Tribes to prioritise local issues. For instance, Neutrals were appreciably more likely than Prioritisers

and Pragmatists to prioritise *protecting the heritage and appearance of our local landscapes* (3.4 vs. 2.2 and 2.4) and *leaving local communities [...] to manage their own habitats* (2.2 vs. 1.2 and 1.4). This implies that, for Neutrals, climate and environmental policies need to be sensitive to local context.

Third, Neutrals are less likely than Prioritisers to prioritise policies which impinge more on personal and consumer freedoms, and they were more likely to support freer market policies. For instance, Neutrals were much more likely than both Prioritisers and Pragmatists to prioritise *ensuring people are free to do what they want* (3.4 vs. 1.3 and 2.0), and much less likely to prioritise *banning or taxing single-use plastics* (3.7 vs. 6.1 and 5.4) and over time, *ensuring the government takes action to ensure people switch from things like petrol to electric cars or gas boilers to greener home heating* (2.7 vs. 3.9 and 3.4).

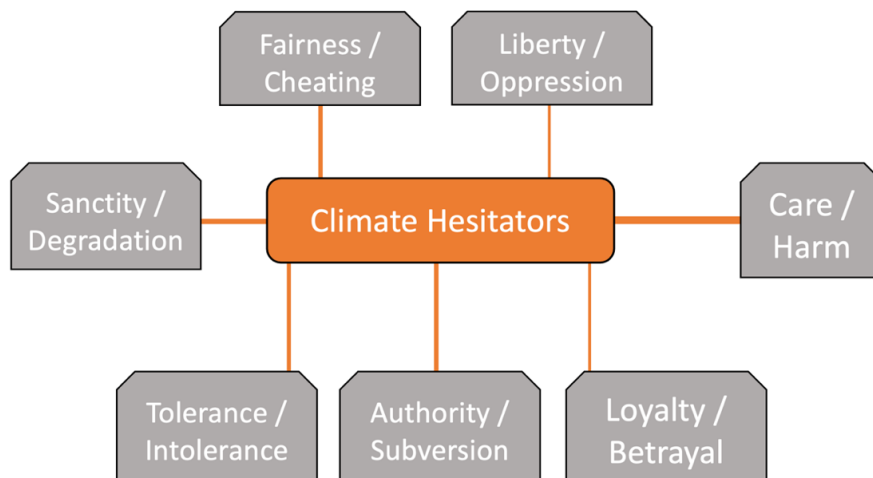
Long-term decarbonisation therefore needs to perform a juggling act to maintain the support of Neutrals over time by focusing or being framed around economic and local priorities. However, Neutrals' philosophical focus on less interventionist policies are likely to become a political sticking point for decarbonisation because climate policies will become more interventionist over, especially in the realm of decarbonising residential properties. Moreover, Prioritisers, who are over 40% of the electorate, generally support more interventionist measures, pulling the government in two opposing philosophical directions. This implies the most politically sustainable route for decarbonisation is pursuing less interventionist policies which still make headway keeping with the UK's carbon budgets, appealing to both Neutrals and Prioritisers.

Given that Neutrals tend to vote for the Conservative Party (Figure 4), the current Government should seek retain their support as much as possible. This is in their political interest, and it will ensure that decarbonisation policies initiated in the 2020s do not lose support later down the line. Unavoidably, some elements of climate policy will become more interventionist over time. Appealing to Neutrals through framing decarbonisation in economic and localist terms is likely to be the path of least resistance.

Climate Hesitators

The Moral Foundations of Hesitators are an anomaly compared to the other Tribes. They have very low sensitivities to all the Moral Foundations compared to other Tribes (Figure 25). This appears in line with our earlier analysis which showed that Hesitators neither strongly oppose or strongly support any of the policies we tested (Figure 16). A low moral sensitivity to every Foundation implies Hesitators are not driven by any one Foundation in particular. This in turn suggests they are not likely to prioritise policies that have strong moral justifications, such as climate policies. Hesitators prioritise *Keeping the down the cost of living*, followed by several climate and environmental policies (Table 4).

Figure 25. Spider diagram of the Moral Foundations of Climate Hesitators.



Source: Policy Exchange analysis of polling results.

However, our analysis suggests that it is not what Hesitators prioritise which is important, but the fact they do not strongly support or oppose any of the policies we tested. For instance, the difference between the policies most likely and least likely to be chosen as a priority for Prioritisers and Pragmatists was 5.4 and 4.5, and for Neutrals and Sceptics it was 3.4 and 4.7.

The higher the difference, the more value a Tribe attaches to its favourite policy over its least favourite policy. For Hesitators, this same difference was only 1.3, implying that, compared to other Tribes, they have a much foggier sense of what their priorities are. It's likely that their low sensitivity to all of the Moral Foundations means they lack the strong moral drivers that underpin strong opinions on climate change.

Hesitators present hard-to-predict political risks for long-term decarbonisation, because they are not morally driven by strong concerns for climate change. Both our polling and MaxDiff modelling support this idea by showing Hesitators lack strong opinions on a range of climate and environmental policies.

Hesitators could pose either a political risk or a political opportunity for long-term decarbonisation. On the one hand, Hesitators view climate change as disadvantaging them, they could drift towards Climate Change Sceptics and increasingly oppose it. Policies that visibly impose costs on an individual level may have this effect, such as *taxing drivers of petrol and diesel cars [...] to encourage them to shift to electric cars*. On the other hand, if Hesitators view climate change as in their interest, they could drift towards Prioritisers and Pragmatists and increasingly support it.

Picking 'winner' policies like these is hard, given the fact more policies involve trade-offs. However, our analysis suggests that Hesitators prioritise economically framed policies, and their Moral Foundations imply that morally justified climate policies are unlikely to win their support. To

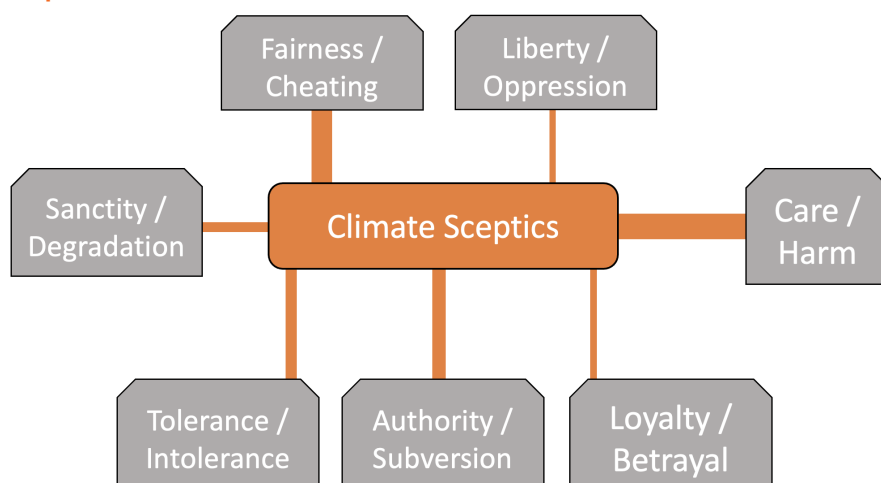
increase the chances of winning Wanderer's support, the best strategy may therefore be to frame climate and environmental policies in economic terms, such as through focusing on investing in green industries.

Climate Sceptics

Climate Sceptics are driven by Care vs. Harm, but they are less morally sensitive to it than Prioritisers and Pragmatists. For Prioritisers and Pragmatists, strong sensitivities to Care vs. Harm and Fairness vs. Cheating manifest as prioritising global and climate and environmental issues (Figure 26).

For Sceptics, a still dominant but weaker sensitivity to these Moral Foundations suggests they are more likely to prioritise local, community-scale policies (Table 5). For instance, their top three most likely priorities out of the 35 we tested are based on non-climate economic outcomes, suggesting they strongly prioritise their own economic wellbeing over other things.

Figure 26. Spider diagram of the Moral Foundations of Climate Sceptics.



Source: Policy Exchange analysis of polling results.

Further, Sceptics are more sensitive to several Moral Foundations compared to other Tribes, and this is reflected in their different priorities. They have the highest moral sensitivity towards Loyalty vs. Betrayal and Tolerance vs. Intolerance of any Climate Tribe. At the same time, they are the most likely of any Tribe to rate *Protecting the heritage and appearance of our local landscapes* and *Focusing on restoring habitats here in the UK* as their top priority. They also had the second highest sensitivity to Liberty vs. Oppression, as well as the highest probability of any Tribes that they would choose *Ensuring people are free to do what they want* as their top priority.

Politically, Climate Sceptics will be a hard group to win over to decarbonisation. Although they have similar policy priorities to Neutrals, they prioritise economic and locally focused policies and personal liberties

much more strongly, views that some climate policies challenge. To appeal to the average Sceptic, climate policies would therefore need to be hyper local while delivering visible economic benefits through safeguarding personal freedoms, which is inherently difficult for a globally defined issue with long payback times. This suggests Sceptics are unlikely to be universally won over, especially as some will philosophically disagree that climate change is happening.

The best political strategy to appeal to Sceptics could therefore be to focus on the economic arguments for decarbonisation. Where possible, climate policies could frame economic benefits in terms of short-term, visible benefits, like the job creation effects of low-carbon investment. This contrasts with emphasising the subtle, long-term economic gains of decarbonisation like avoiding the damages of runaway climate change or the potential for long-term efficiency gains by switching to some low-carbon technologies, like electric vehicles. These more subtle economic arguments are less likely to have political bite with Sceptics, despite their validity.

Summary

By examining the Moral Foundations of a group, policymakers can gauge what kind of policies a group are likely to support over time. For instance, we would expect Climate Prioritisers to support most kinds of climate action due to their moral sensitivity to Care vs. Harm and Fairness vs. Cheating, which our analysis of their policy priorities suggests is true. At the other end of the climate scale, Climate Change Sceptics have a broader base of Moral Foundations than Prioritisers, suggesting their priorities are unlikely to be focused on climate and environmental action. This is also supported by our analysis.

6. What are the implications for climate and environmental policy?

Several conclusions arise from our polling and related research on how to frame and design climate and environmental policies to enhance their long-term political sustainability:

- 1. Fairness first:** Those responsible for causing climate change and environmental damage bearing a fair burden for stopping or reversing it. This reflects the general prioritisation of the fairness/cheating moral foundation, which came second only to the care/harm foundation. It also reflects the popularity of policies which minimise cost rises for households and channel costs towards polluters. Notably, the distinction between minimising cost rises for households and the polluter pays is the same in practice; households are often polluters themselves, and cost increases shouldered by the private sector are likely to be passed to consumers over time. Our results suggest that policies which frame consumers paying ‘implicitly’ (e.g. through the private sector, leading to price increases over time) rather than explicitly (e.g. paying upfront through directly taxing petrol and diesel cars) are consistently more popular, and therefore politically more sustainable.

The Government needs to tackle the question of costs are framed upfront in its framing of decarbonisation policies. For instance, tackling climate change is likely to require the use of carbon border adjustment mechanisms (CBAM) to avoid offshoring emissions. As previously argued by Policy Exchange, CBAMs could be economically regressive against lower- and middle-income groups without a clear emphasis on fairness in their design, such as through a ‘carbon dividend’.¹⁷ To ensure political sustainability, climate policies must be applied broadly and with a clear rhetorical emphasis on fairness.

- 2. Determined-but-steady transition:** Over half the public support a determined-but-steady approach to climate change, characterised by significant policy change and investment in new technologies over the next few decades. In contrast, a quarter support sudden and radical policy shifts such as ‘de-growth’ (intentional economic

17. Matt Rooney et al (2018). *The Future of Carbon Pricing: Implementing an independent carbon tax with dividends in the UK* ([Link](#)).

slowdown or recession to lower environmental impacts) or alternative democratic models such as a climate assembly. Notably, breaking the law to make the case for the climate change is the least popular statement tested in our analysis. Those who think we should let free markets adapt over time are also in a small minority, and hardly anyone believes we should take no action at all.

The current government's '10 Point Plan for a Green Industrial Revolution' mostly reflects the public's priorities for action on climate change and the environment through its policies of investment in green technologies and industries as well as the protection of landscapes. The Plan's Achilles heel is nuclear power, which may only be politically palatable to the public if it is 'out of sight' from most communities and if its costs are minimised for consumers.

One of the most striking results of this work is that only a small proportion of the UK public are willing to sacrifice the things they value to achieve the goal they think is desirable. In particular, the petrol and diesel vehicle phaseout and the prospect of transitioning away from gas boilers are near the bottom of every Tribe's priorities, highlighting the political disconnect between people's support for and implementation of Net Zero.

- 3. Respect local & diverse communities:** Whilst climate change and ecological decline are global challenges, the UK should be very clear about its actions at home as well as abroad. These should include investment in the landscape and improving local wildlife, which are highly valued by communities throughout the UK. London is unsurprisingly the most 'internationalist' region, and therefore the most amenable to arguments relating to global challenges. London is also the most ethnically diverse region, and ethnic minorities show a pronounced presence among 'Climate Hesitators'. This highlights a need to understand their environmental priorities in greater depth.
- 4. Use market-based policies and maximise choice:** A majority prefer policies that work with markets by investing in private sector research and development or supporting industries in their earliest stages. Policies that impact on common aspects of life in a short time frame and policies designed to limit economic growth are generally less popular. They broadly prefer solutions which maximise choice, such as creating attractive new products and ideas. Notably, they are willing to accept more interventionist policies on some standalone issues, such as banning single-use plastics, the 2030 ban on petrol and diesel vehicles and the introduction of heat pumps. These are all policies that impose on consumer lifestyles, which enjoy majority support.

Glossary

Term	Definition
10 Ten Point Plan for a Green Industrial Revolution	A policy strategy published in November 2020 setting out how the UK Government plans to support green jobs and decarbonise the UK economy during and after the recovery from the COVID-19 pandemic.
2030 Internal Combustion Engine (ICE) phaseout	The UK's policy to ban the sale of new petrol and diesel cars and vans by 2030, and some petrol and diesel 'hybrid' cars and vans by 2035.
Anywheres and Somewheres	A typology to describe two broad groups of people included in David Goodhart's 2017 book, <i>A Road to Somewhere</i> .
Carbon Border Adjustment Mechanisms (CBAMs)	A mechanism for ensuring that imported goods pay the same carbon taxes that domestic producers are liable for.
Carbon capture, Utilisation and Storage (CCUS)	CCUS is an emissions reduction process that involves capturing CO ₂ produced by industry. This CO ₂ is then either used or stored securely underground.
Climate Change Committee	Independent statutory body advising the UK Government and Devolved Administrations on emissions targets and preparing progress reports to Parliament.
Environmental Land Management (ELMs) scheme	The post-Brexit successor scheme to the EU's Common Agricultural Policy, the ELMs scheme will partly base the subsidies farmers and land managers receive on the public goods they produce.
Green Finance	Any structured financial activity designed to ensure better environmental outcomes.
Hydrogen	A clear, odourless gas which is highly flammable, the most common element in the universe which can be used as a low emission alternative fuel for power, heating and transport.
Jet Zero	The UK Government's public-private programme to deliver zero emission transatlantic flights within a generation.
MaxDiff	MaxDiff is a modelling technique to estimate a survey taker's priorities out of a set list from a limited set of their answers.
Moral Foundations Theory	Moral Foundations Theory is a descriptive theory which contends that human moral judgment (a) is primarily an intuitive, non-rational process, and (b) can be broken down into discrete categories of moral intuition. Extant theory posits five core domains of moral intuition, geared toward the processing of information pertaining to: (i) harm vs. care; (ii) fairness vs. cheating; (iii) loyalty vs. betrayal; (iv) authority/respect vs. subversion; and (v) purity/sanctity vs. degradation.
Net Zero	A target of zero overall greenhouse gas emissions across an economy or for a company. For example, the UK Government has committed to Net Zero emissions across the UK by 2050. The "Net" in Net Zero refers to a balance between positive emissions (e.g. from burning fossil fuels) and negative emissions (e.g. from planting trees or capturing carbon dioxide from the air).
Red Wall	A term used in British politics to describe a set of constituencies in England and Wales—namely in the Midlands, Northern England and North East Wales—which historically tended to support the Labour Party.
Zero Emission Vehicles (ZEVs)	ZEVs include BEVs, PHEVs and FCEVs. ZEVs have zero exhaust emissions, i.e. no carbon dioxide or nitrogen oxide (NO _x) emissions from the exhaust. However, ZEVs still contribute to local air pollution through non-exhaust emissions, including from brake and tyre wear



£10.00
ISBN: 978-1-913459-83-3

Policy Exchange
8 - 10 Great George Street
Westminster
London SW1P 3AE

www.policyexchange.org.uk