

The Ipsos

CLIMATE CHANGE REPORT 2020

November, 2020

GAME CHANGERS



CONTENTS



1. Issues landscape



2. Causes and impacts of climate change



3. Emissions policy and leadership



4. Responsibility and performance



5. Individual behaviours



ISSUES LANDSCAPE

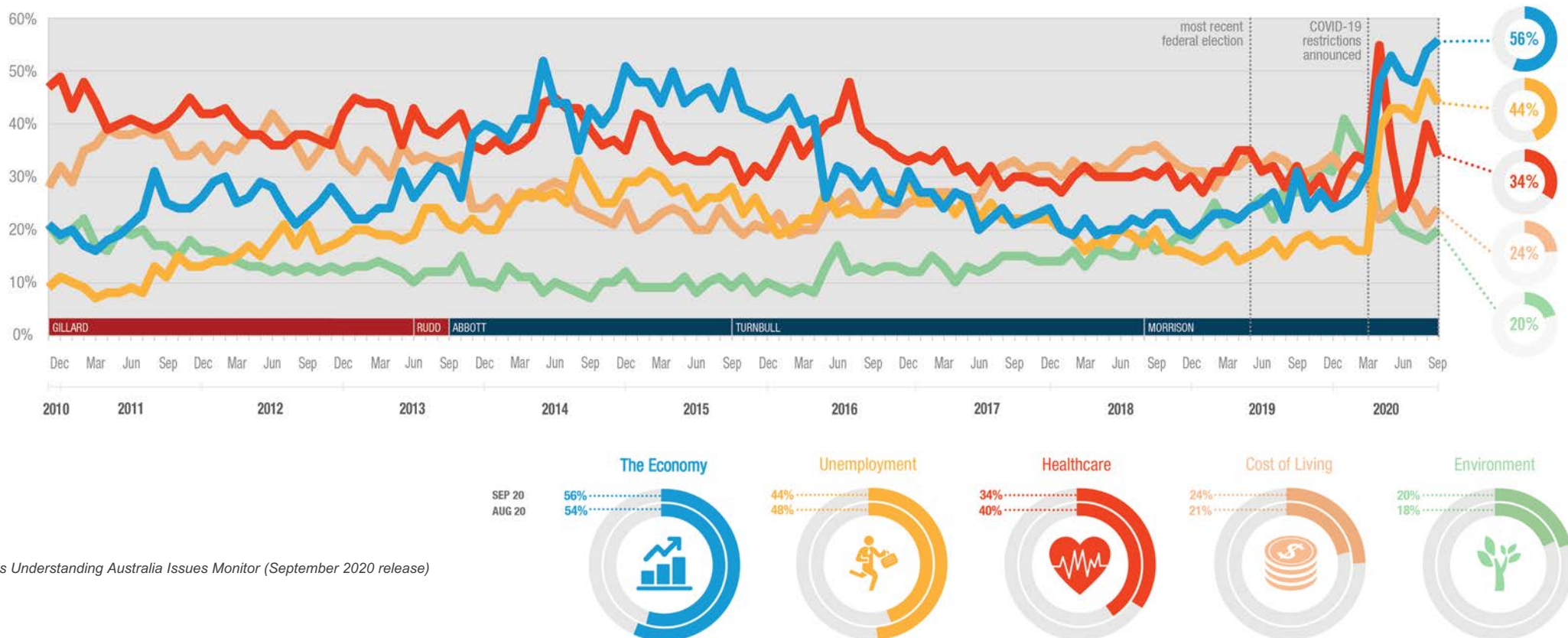
1

THE COVID-19 PANDEMIC HAS IMPACTED THE RELATIVE IMPORTANCE OF THE ENVIRONMENT FOR AUSTRALIANS

Since 2010, the Ipsos Issues Monitor has been tracking public sentiment by asking a representative sample of 1000 Australians to select the top three issues facing the nation. At the beginning of 2020, in the wake of the unprecedented summer bushfire season, the environment was the top issue facing Australia for the first time. More than 40% of Australians rated it in their top three.

Since January, the Covid-19 pandemic has had a marked impact on our priorities. The economy and unemployment are now the top two issues facing the nation by a comfortable margin. Concern about healthcare peaked in April and again in August, following the rollercoaster of new outbreaks and extended lockdowns. This has left the environment as the fifth most pressing issue in the eyes of Australians. The proportion of people rating it in their top three halved to 20% between January and September.

So what does this drop in importance relative to economic and health issues mean for our focus on climate change issues?



Source: Ipsos Understanding Australia Issues Monitor (September 2020 release)

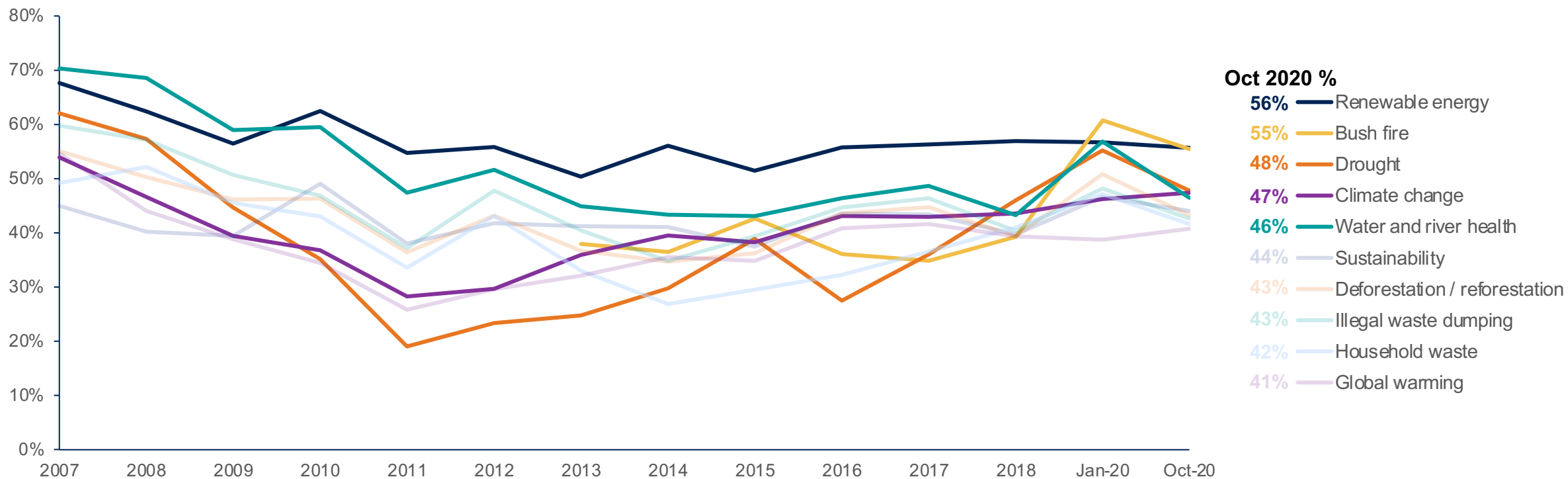
THE SUMMER OF BUSHFIRES RAISED THE PROFILE OF CLIMATE AND WATER-RELATED ISSUES

Each year we survey more than 1000 Australians for the Ipsos Climate Change Report. We ask which environmental issues they would take action on if they were making decisions for the nation. During 2020, we asked this question twice; in January and again in October.

In January 2020, during the peak of the fire season, Bushfire topped the list of environmental issues Australians would take action on (61%). While this has dropped away slightly to 55% in October, the threat of bushfire remains a concern for many heading into summer. Water and river health (57%) and Drought (55%) also peaked in January 2020, but have fallen back to levels seen in 2018.

Support for general action on Climate change has continued to trend upwards through the pandemic (47% would take action on the issue). This contrasts with the downward trend during and following the global financial crisis in 2008-2009. Support for action on Climate change reached its lowest point in 2011 (28%) and has been on the rise since then.

Support for action on Renewable energy has been strong for a decade and in October 2020 it remains the top issue Australians would take action on (55%).



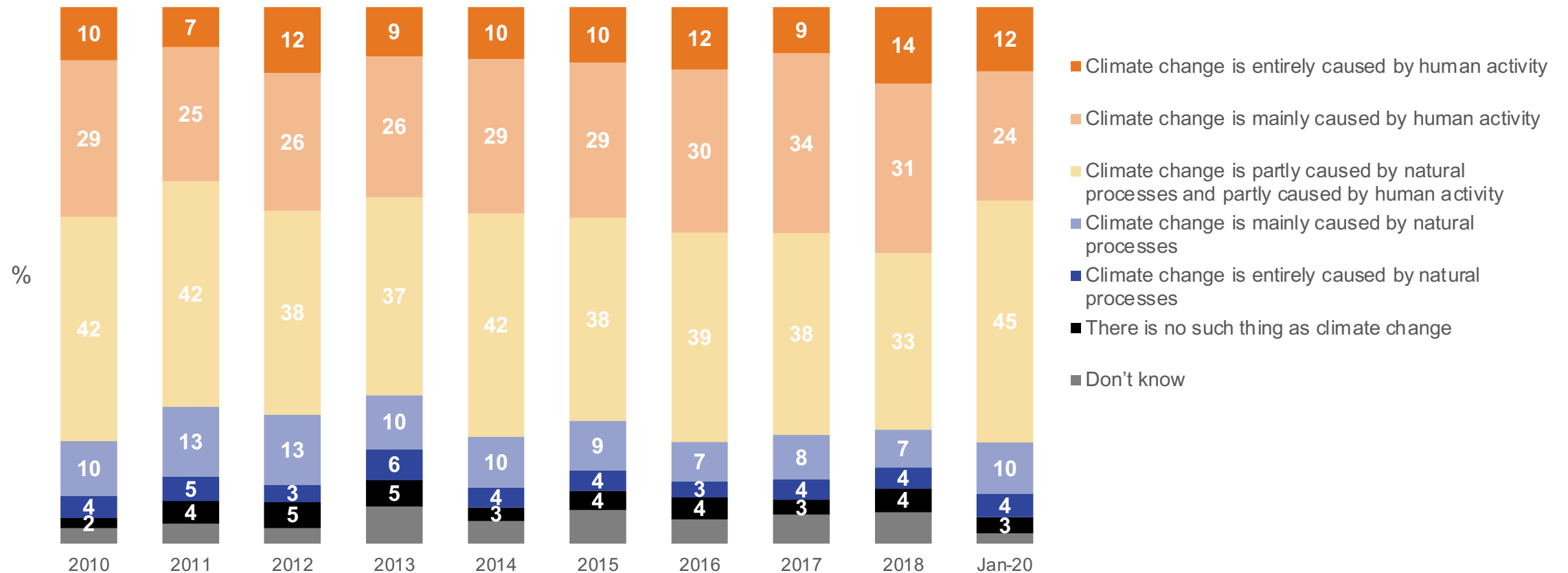


CAUSES AND IMPACTS OF CLIMATE CHANGE

2

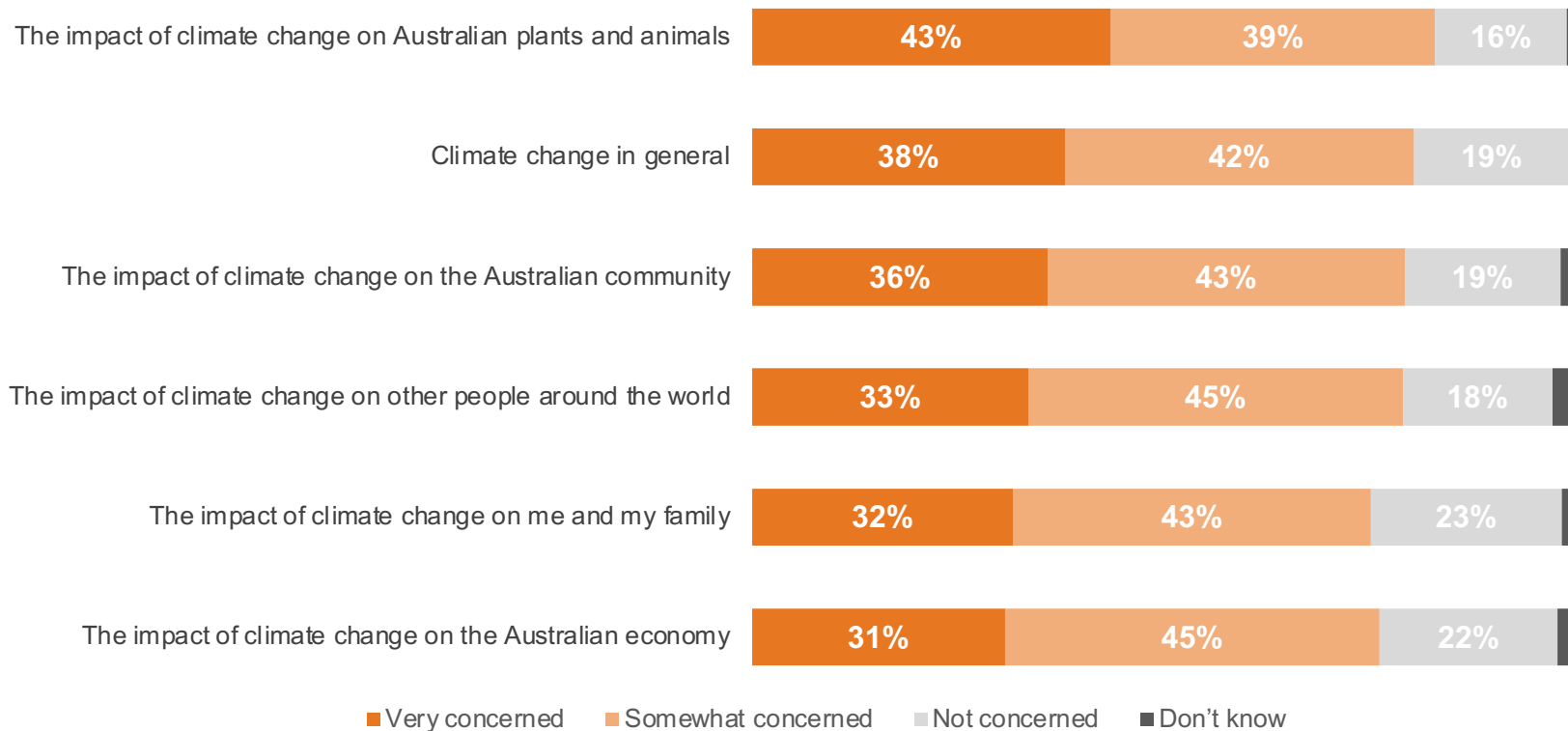
IN JANUARY 2020, MORE AUSTRALIANS BELIEVED THAT CLIMATE CHANGE IS DRIVEN BY A MIX OF CAUSES

Perhaps counterintuitively, at the height of the bushfire season in January 2020, 45% of Australians believed that climate change is caused by a mix of natural processes and human activity (up from 33% in 2018). This coincided with a drop in the proportion of people believing that climate change is mainly or entirely caused by human activity (36%, down from 46% in 2018).



Question: Which best describes your opinion about the causes of climate change? (2010-Jan 2020)

MOST ARE CONCERNED ABOUT THE ECOLOGICAL AND SOCIAL IMPACTS OF CLIMATE CHANGE



The majority of Australians are *very* or *somewhat concerned* about each of the potential impacts of climate change, as measured in January 2020.

Overall, we are most worried about impacts on ecology and on other people.

The impact of climate change on Australian plants and animals is the top concern (43% *very concerned*).

General concern about climate change (38% *very concerned*) and impacts on Australian (36%) and international (33%) communities are also high for many.

However, concerns about how climate change may have negative effects closer to home are also high.

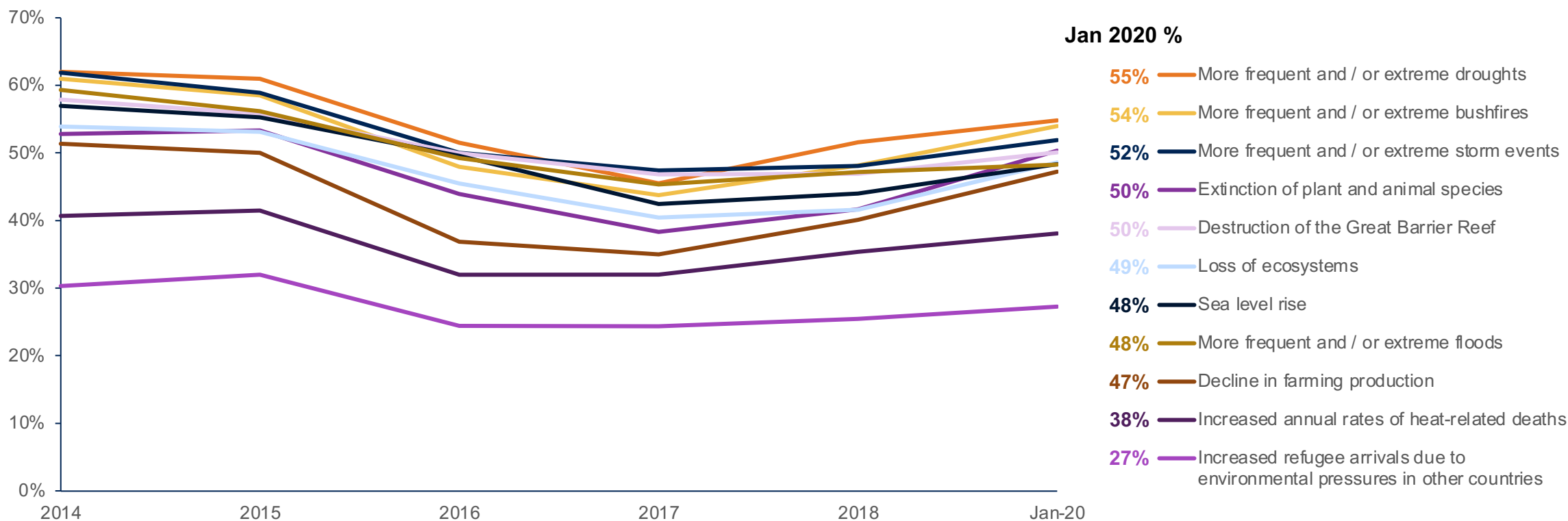
Close to a third are *very concerned* about the impacts of climate change on their families (32%) and the Australian economy (31%). Less than a quarter are *not concerned* about these impacts.

Question: How concerned are you about...? (Jan 2020)

PERCEPTIONS THAT CLIMATE CHANGE IS ALREADY IMPACTING AUSTRALIA CONTINUE TO RISE

At least half of Australians believe that climate change is already bringing about more frequent or extreme natural events.

The belief that climate change is causing more frequent or extreme droughts (up 3% since 2018) and bushfires (up 6%) were both up steeply in January 2020 compared to 2018. Almost half (49%) believed that the climate change is causing ecosystem loss, up 7% on 2018. Despite this upward trend, the proportion of Australians who believe the potential impacts of climate change are already being felt, is lower than in 2014 and 2015 across all impacts.



Question: In how many years, if at all, do you think climate change will cause the following in Australia? Please enter a number representing the number of years you think it will be before climate change will cause each of the events listed. (2014-Jan 2020) *Only the proportion of those who chose 'Climate change is already causing this'



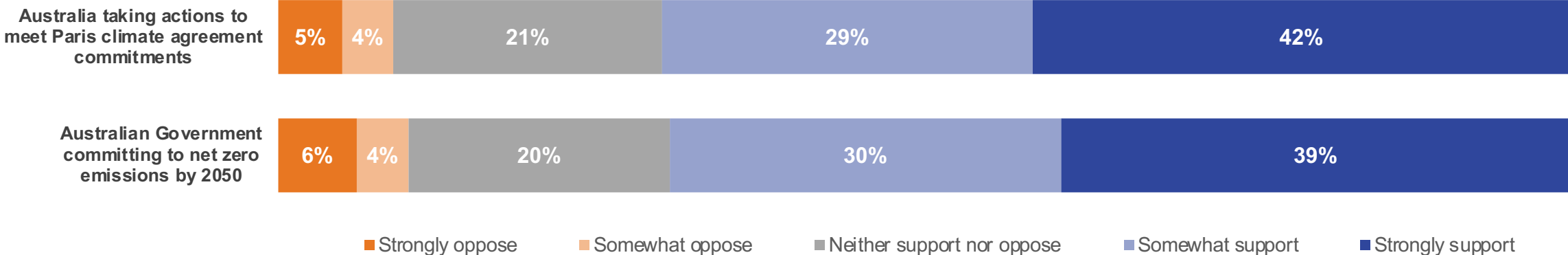
EMISSIONS POLICY AND LEADERSHIP

3

THE MAJORITY OF AUSTRALIANS SUPPORT GOVERNMENT COMMITMENTS TO EMISSIONS REDUCTIONS

In October 2020 we asked participants about their level of support for Australian Government commitment to targets for the Paris climate agreement and to net zero emissions by 2050 from the Australian economy.

Australians show high levels of support for both the Government taking action to meet the Paris agreement commitments (71%) and for committing to net zero emissions by 2050 (69%).



In addition to this, data collected in January 2020 shows that half of Australians (56%) agree that the nation will be better-off in the long run if Australia meets the Paris agreement targets, indicating that many see long-term benefits to involvement in international efforts to reduce emissions.

54% also agree that Australia should transition to a carbon-neutral economy as soon as possible.

Question: To meet its commitments under the Paris climate agreement, Australia has to cut its carbon emissions by 26-28% below 2005 levels by 2030. Please indicate the extent to which you support or oppose Australia taking actions to meet its commitments under the Paris climate agreement. (Jan 2020-Oct 2020)

Question: Recently, there has been public debate about whether the Australian Government should commit to net zero emissions in the Australian economy by 2050. Net zero emissions means every tonne of man-made greenhouse gas that is emitted must be matched by a tonne removed from the atmosphere. Please indicate the extent to which you support or oppose the Australian Government setting a goal of net zero emissions by 2050. (Oct 2020)



MOVING TO RENEWABLES IS INCREASINGLY SEEN AS POSITIVE FOR THE CLIMATE AND LOCAL JOBS

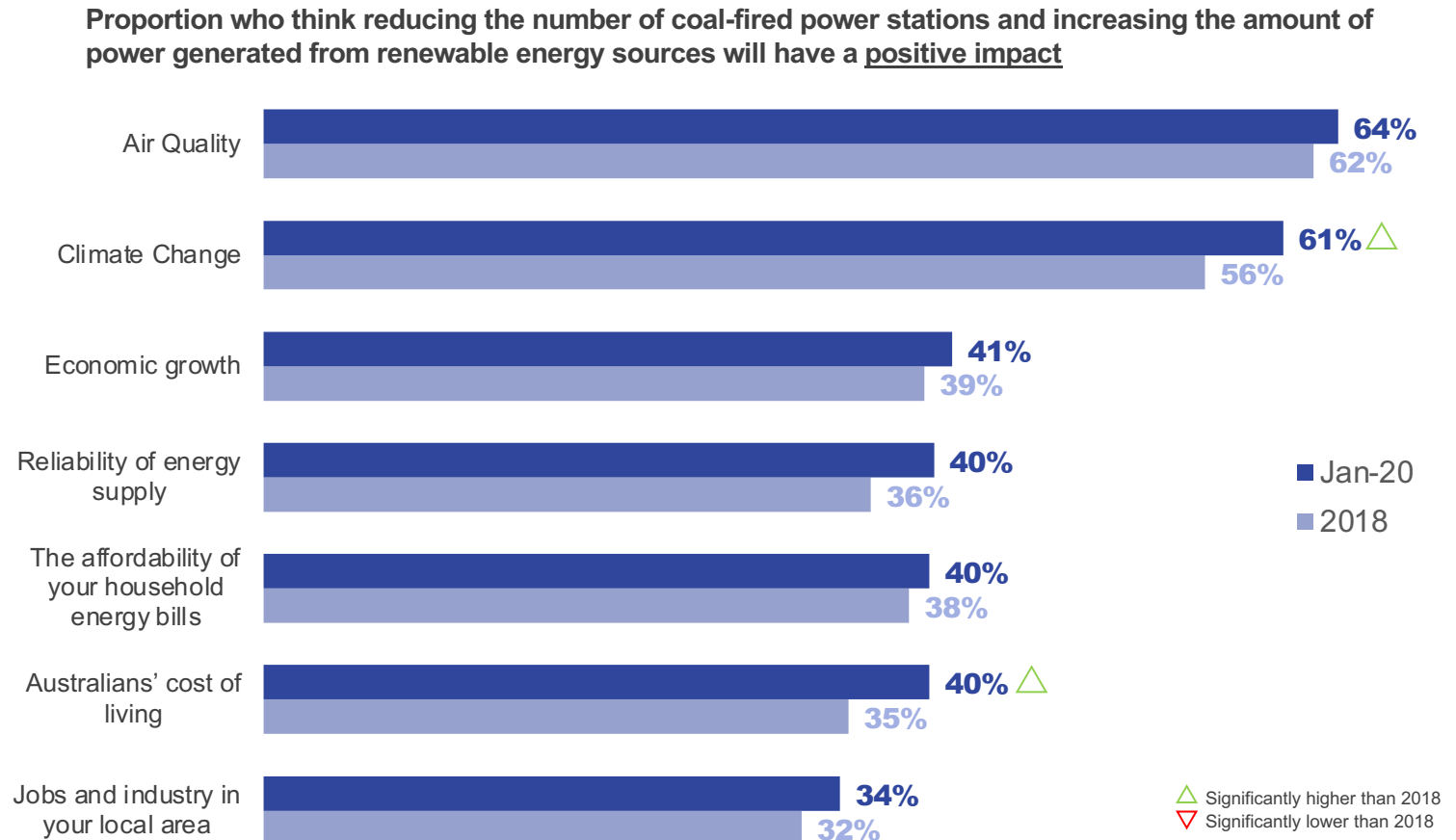
For the past two years, we have asked participants what impact moving from coal-fired power stations to renewable energy sources will have on a range of environmental and economic outcomes.

Improved environmental outcomes (air quality and climate change) remain the biggest positive impacts Australians see in moving to renewables.

Across all the outcome areas, perceptions that a move to renewables will have a positive impact trended upwards between 2018 and January 2020.

Climate change and cost of living are the biggest movers, with statistically significant increases in the proportion of Australians who feel these areas will be positively impacted by a move to renewables.

Question: How do you think reducing the number of coal-fired power stations and increasing the amount of power generated from renewable energy sources such as solar and wind is likely to impact the following? (2018-Jan 2020)



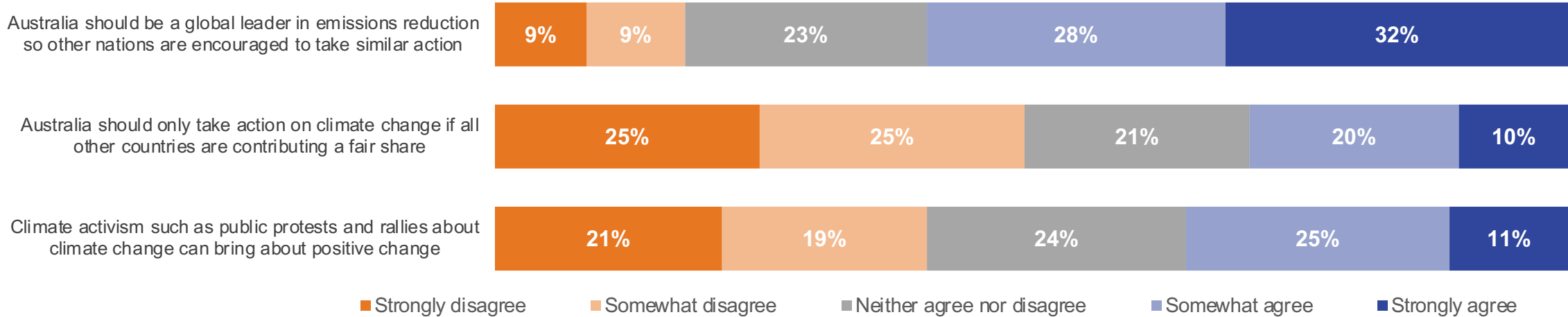
THERE IS STRONG SUPPORT FOR AUSTRALIA TAKING A LEADERSHIP ROLE ON CLIMATE CHANGE

There is strong support for Australia taking a global leadership role on climate change.

In January 2020, 60% of Australians agree that Australia should be a global leader in emissions reduction with the aim of encouraging other countries to take similar actions. Close to a third (32%) strongly agree, while 18% disagree.

Aligned to this, just 30% agree that Australia should only take action on climate change if other countries are contributing a fair share. A fifth (21%) neither agree nor disagree, leaving half who feel that a lack of action from other countries on climate issues should not hold Australia back.

Opinion is more divided on the efficacy of climate activism. While just over a third (36%) agree that protests and rallies can bring about positive change, 40% disagree.



Question: How strongly do you agree or disagree with the following statements? (Jan 2020)



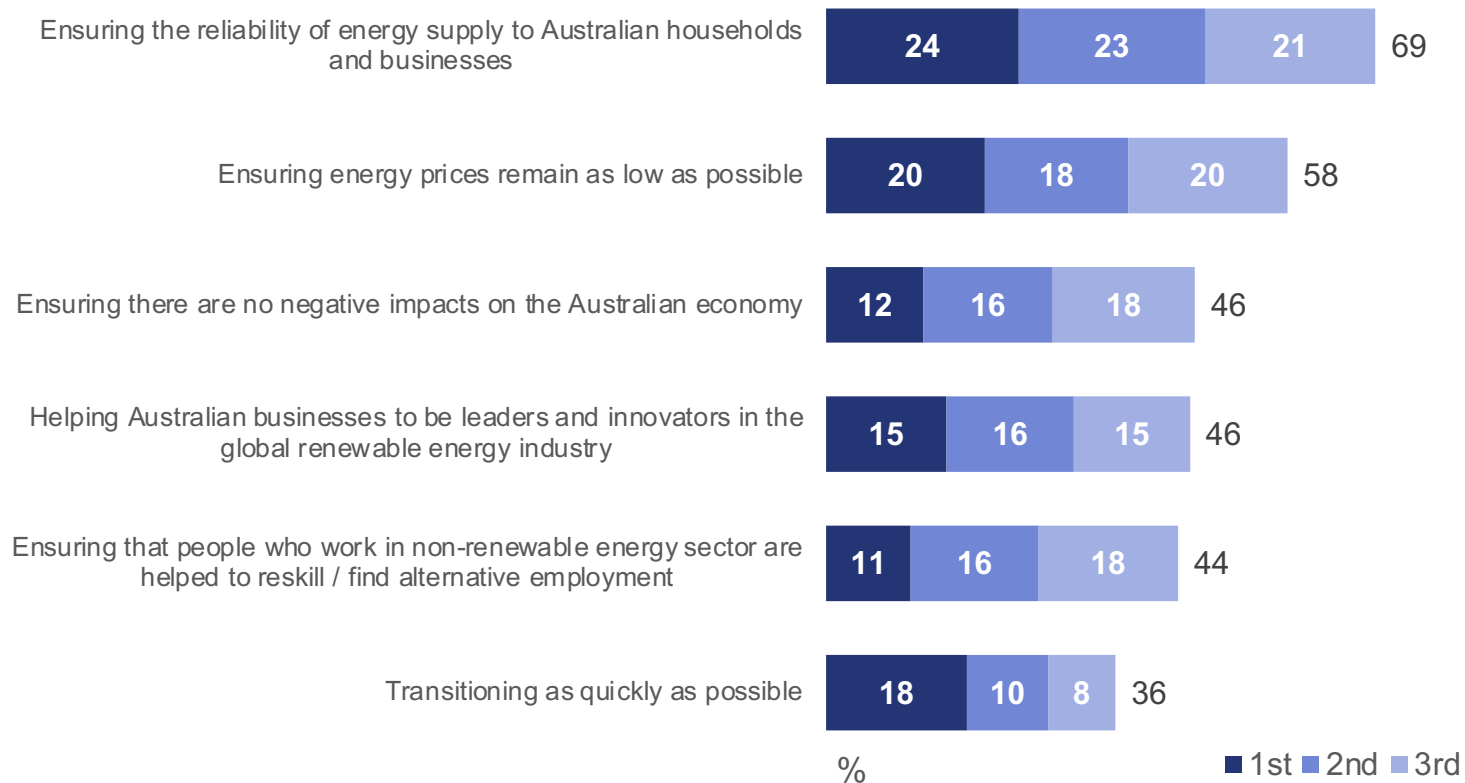
RELIABILITY AND COST OF ENERGY ARE KEY CONCERNS IN TRANSITIONING TO RENEWABLES

In January 2020, we asked how issues relating to a transition to renewables should be prioritised.

Potential personal impacts of a transition to renewable energy are key concerns for Australians. More than two-thirds (69%) rate reliability of supply as a top-three priority in transitioning. Ensuring energy prices remain low is a top-three priority for 58%.

Just under half of Australians feel that ensuring there are no negative effects on the economy (46%), helping Australian businesses take a lead on renewables (46%) and helping workers in the energy sector reskill (44%) should be prioritised.

Transitioning as quickly as possible is a top-three priority for just 36% of Australians. However 18% rate a fast transition as the number one priority.



Question: Some people say that changing Australia's energy mix by reducing the amount of power generated from non-renewable energy sources (such as coal and gas) and transitioning to an increased share of power generated by renewable energy sources (such as wind and solar) is an important step in addressing climate change. Thinking about making that transition, how do you think the following issues should be prioritised? Please indicate 1 for the most important, 2 for the second most important etc. through to 6 for the least important. (Jan 2020)



RESPONSIBILITY AND PERFORMANCE

4

THOSE WITH THE MOST POWER TO INFLUENCE CLIMATE CHANGE ARE SEEN AS PERFORMING POORLY

This year we asked participants how much power they thought a range of institutions and groups have to make changes that influence climate change.

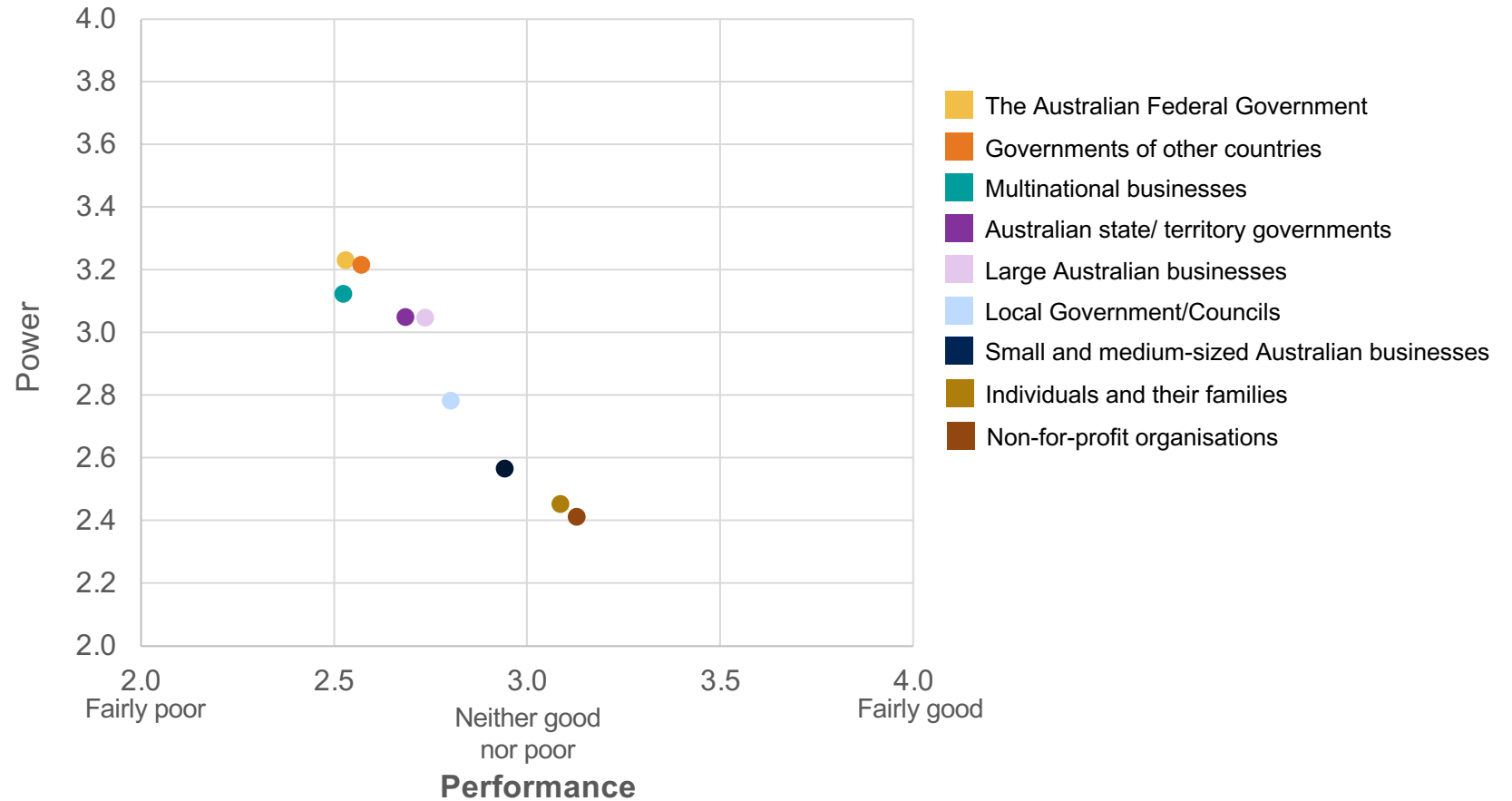
The Australian Government, governments of other countries and multinational business are seen as the most powerful organisations.

SMEs, individuals and not-for-profits are seen as having the least ability to influence change.

The organisations perceived to have the greatest ability to influence climate change are seen as performing least well overall.

National governments (including Australia's) and multinational businesses rate lowest for performance, followed by state and territory governments.

Overall, none of the groups are seen to be performing well in combating climate change.



Question: How much power do you think the following groups have to make changes that influence climate change? (Jan 2020)

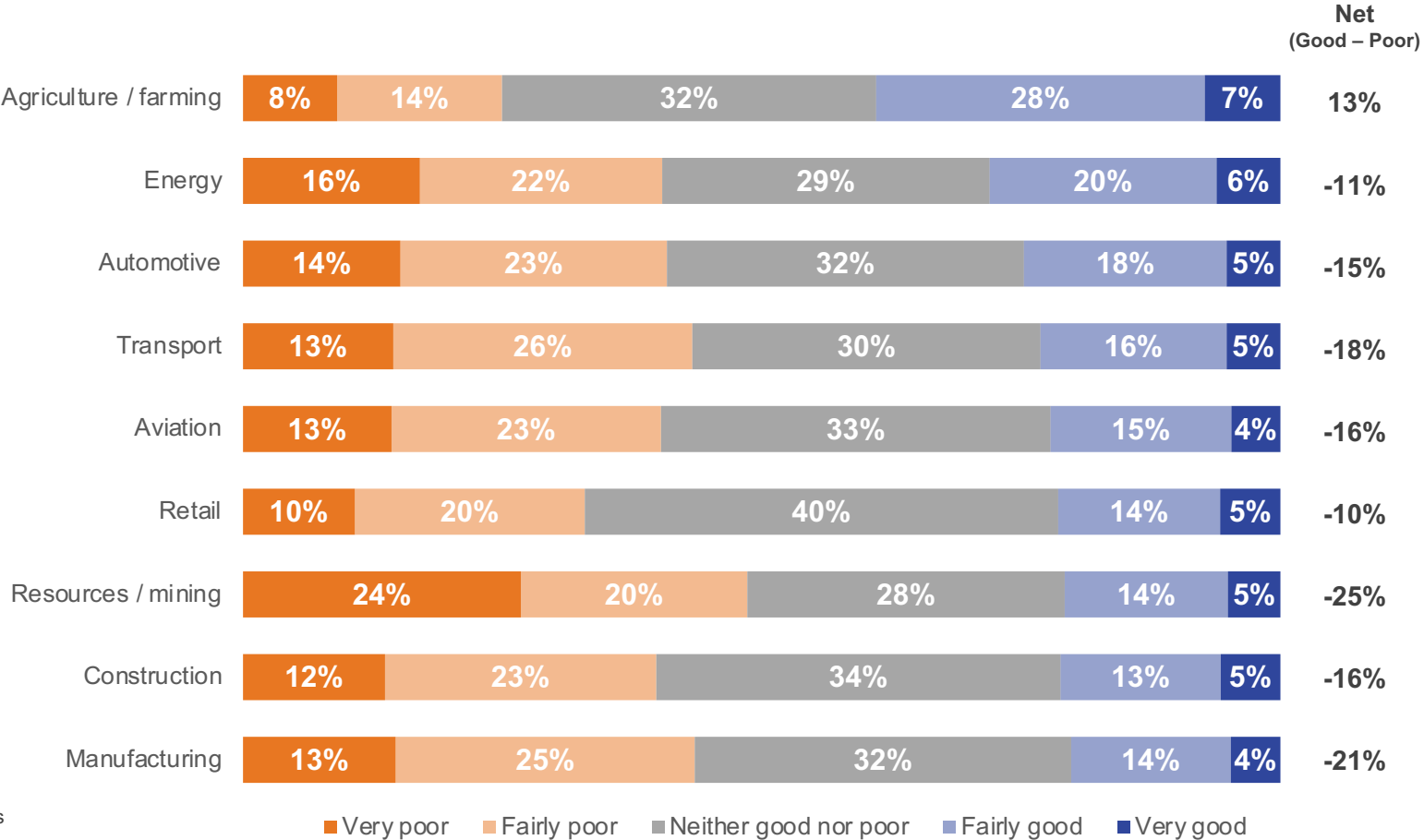
Question: How would you rate the performance of the following groups in terms of the actions they have taken in response to climate change? (Jan 2020)

AGRICULTURE IS THE ONLY INDUSTRY SEEN TO BE PERFORMING WELL BY MORE THAN A QUARTER OF PEOPLE

This year we asked participants how well they think specific industries are performing in the actions they have taken to respond to climate change.

The agricultural sector stands out as the industry seen to be performing the best in relation to climate change action. It is the only industry with net positive perceptions of its performance (i.e. the proportion of those who feel its performance is good outweighs those who feel it is poor).

The resources and manufacturing sectors have the lowest net performance, with both below -20%.



Question: How would you rate the performance of the following sectors in terms of the actions they have taken in response to climate change? (Jan 2020)





INDIVIDUAL BEHAVIOURS

5

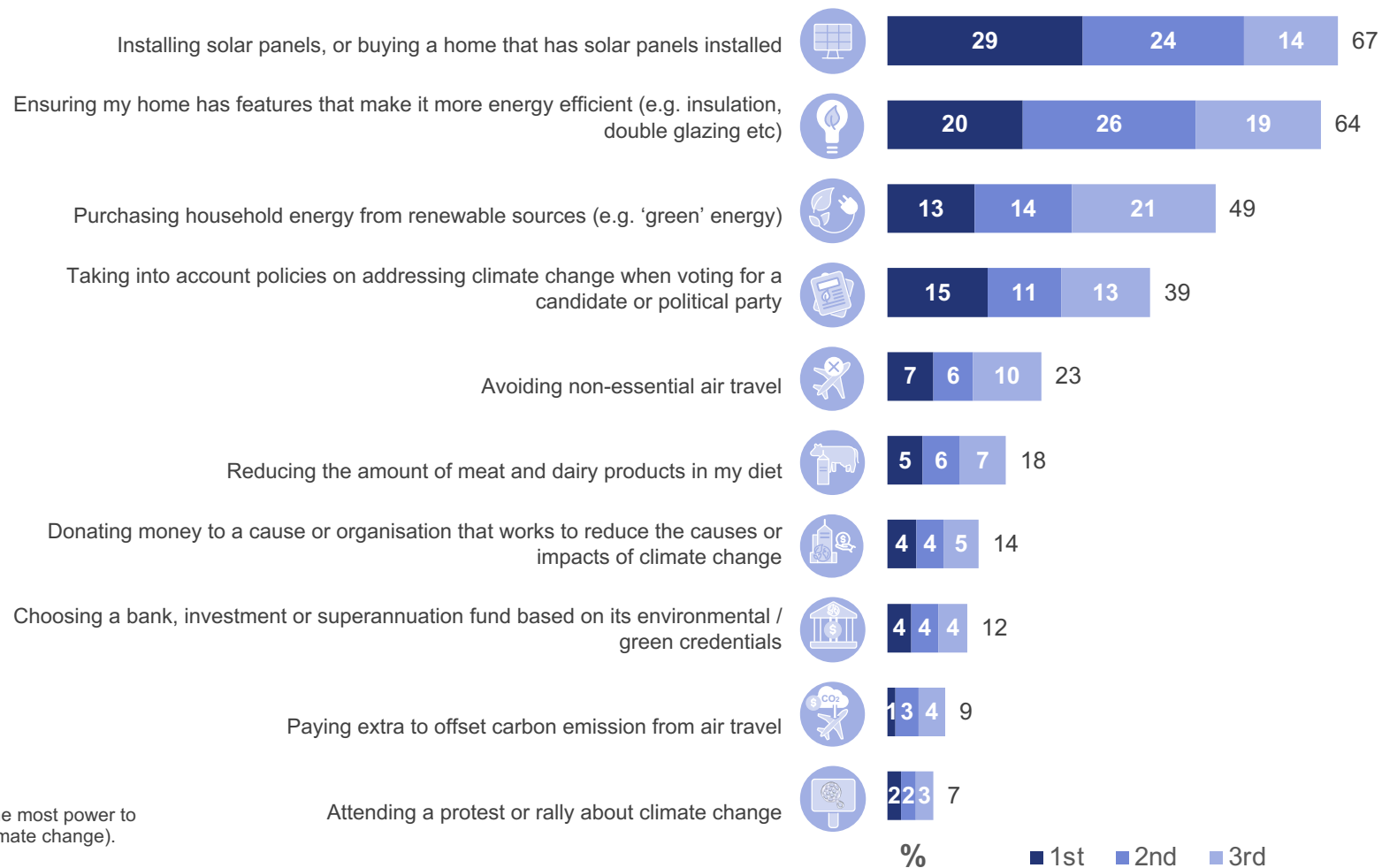
RENEWABLES AND ENERGY EFFICIENCY ARE SEEN AS THE MOST EFFECTIVE PATHS TO INDIVIDUAL CLIMATE ACTION

This year we asked participants which of a range of individual measures have the most power to have a positive impact on climate change.

According to Australians, installing solar panels and taking energy efficiency measures at home are ranked as the most effective means through which individuals can positively impact climate change. More than two thirds rank these measures in the top three for effectiveness.

Purchasing energy from renewable sources is also seen overall as being effective by 49% of Australians.

Taking climate change into account when voting is seen as effective by just 39%.



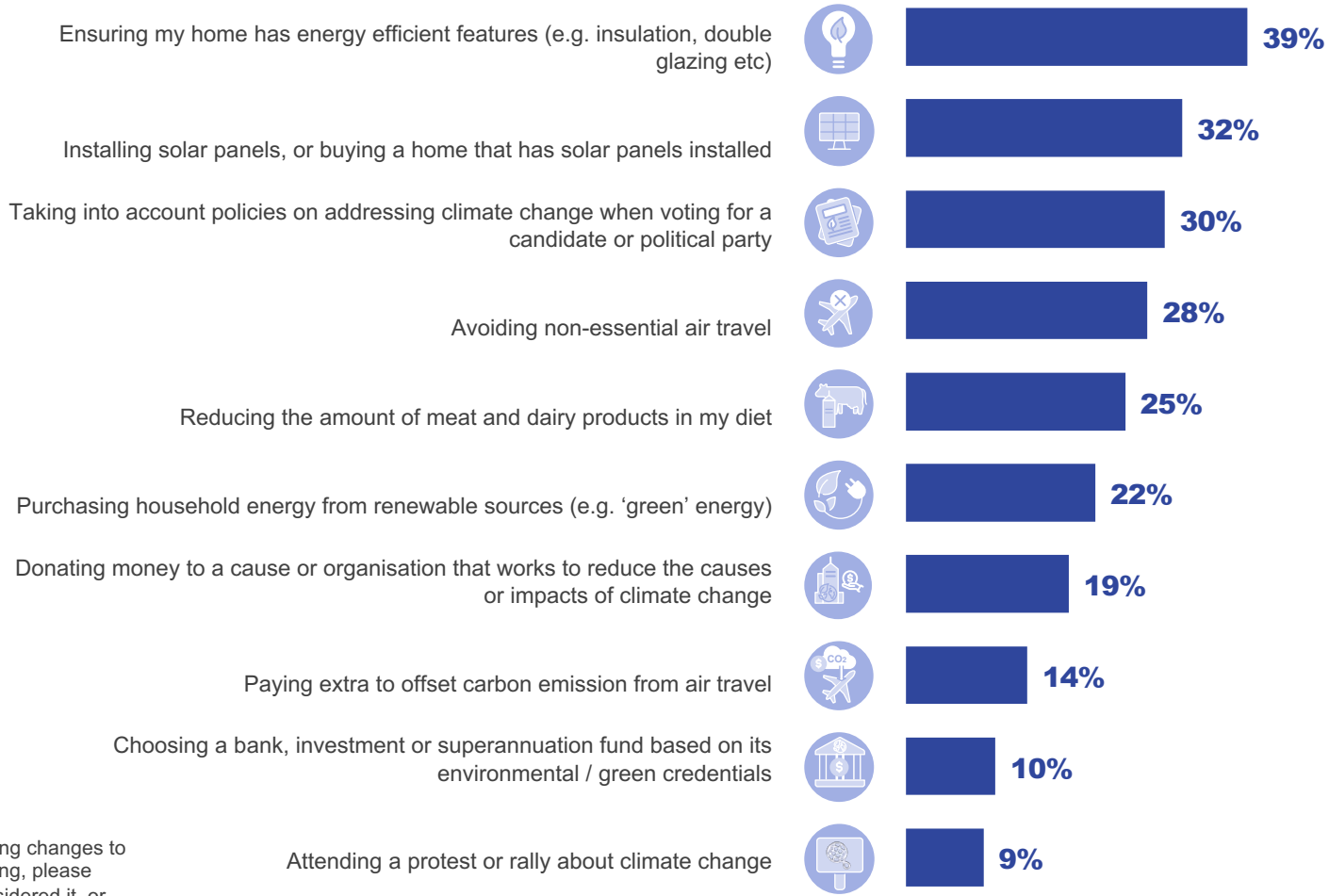
Question: Considering these same activities, which three do you think have the most power to bring about positive impact on climate change? (i.e. reducing the causes of climate change). Please rank the top three activities (1 being the most effective). (Jan 2020)

ENERGY EFFICIENT HOMES AND RENEWABLE ARE THE MAIN ACTIONS UNDERTAKEN BY RESIDENTS

We also asked participants whether they have already undertaken each of the individual measures.

The initiatives seen as being most effective – installation of solar panels and energy efficiency measures at home – are also those with the highest uptake by Australians. Four in ten (39%) have energy efficient features in their homes, and 32% have solar panels.

Close to a third (30%) say they have taken climate change into account in voting decisions.



■ % who have already done

Question: Some people try to reduce their impact on climate change by making changes to their lifestyle or the goods and services they purchase. For each of the following, please indicate whether you have already done this, are considering it, have not considered it, or would not do it (or whether you consider it not applicable to you or your household). (Jan 2020)



CONTACT



STUART CLARK

Director
Ipsos Public Affairs
stuart.clark@ipsos.com

for more information about the Ipsos Climate Change Report

ABOUT IPSOS

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP
www.ipsos.com

GAME CHANGERS

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:

You act better when you are sure.



**BE
SURE.
ACT
SMARTER.**

GAME CHANGERS

