



GAME CHANGERS

The Ipsos Climate Change Report 2018



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Welcome

Every year, Ipsos surveys Australians to understand changes in our attitudes and sentiments relating to climate change and other environmental issues. At the start of a year when Australians will go to the polls for state and federal elections, it is timely to reflect on public attitudes about climate change and energy policies.



This latest report uncovers a growing momentum for action on climate change and acceptance of the role of humans in causing this phenomenon. Incremental increases in several key metrics indicate that concern about climate change is higher than at any time since the study began in 2010.

- More Australians than ever before believe that climate change is entirely or mainly caused by human activity (46%).
- More Australians than ever before think that climate change is already impacting the nation through more frequent and extreme drought (52%) and bushfires (48%).



Energy policy is also shaping up as a key battleground issue for the upcoming Federal Election. Several new questions in this latest study reveal that the majority of Australians believe that they will **not** be negatively impacted by a move towards renewables:

- Just 24% of Australians think that a move towards renewables will negatively impact economic growth
- 30% think that a move towards renewables will negatively impact the reliability of energy supply
- 34% think that a move towards renewables will negatively impact the affordability of household power bills



Support for climate action by the government is on the rise. The latest findings show a sharp increase in the proportion of Australians who believe that we should be doing more to address climate change. Support for Australia honouring, and even surpassing our international commitments on climate action is high:

- Two-thirds (64%) believe that increasing renewable capacity should be a high or essential priority in Australia's energy policy
- Almost half (49%) feel that honouring the Paris Climate Agreement should be a high or essential priority
- 40% believe that setting even more ambitious targets than the Paris Agreement should be a high or essential priority

January 2019 was the warmest month on record in Australia since records began.¹ Read on to understand how the Australian public is responding to our warming climate.

¹ <http://media.bom.gov.au/releases/629/australia-experiences-its-hottest-january-on-record/>

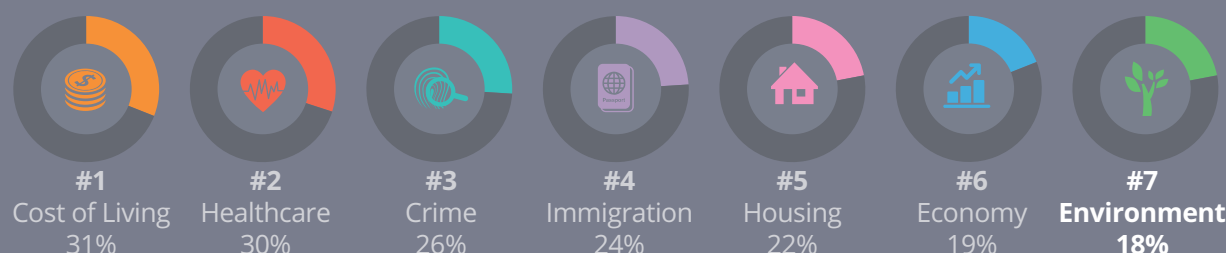
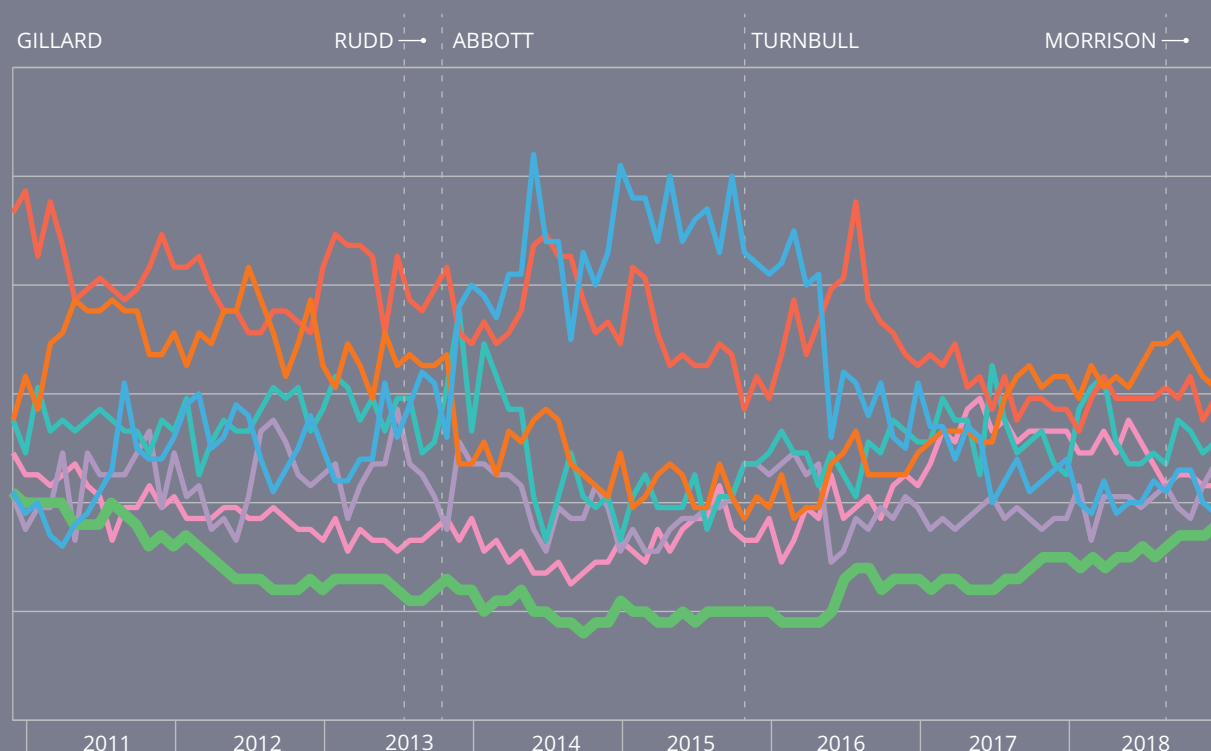
All findings in this report are based on an online survey of n=1000 Australian residents undertaken during December 2018. The sample was broadly representative of the Australian population by age, gender and location.

Environment returns as an important issue

This report presents the findings of our annual Climate Change study. To contextualise the findings, it is worth looking at how the environment² ranks as an issue for Australians, and how this has changed over time compared with other key issues.

When the *Ipsos Issues Monitor*³ was launched in November 2010, the environment was the 5th most commonly identified top issue facing the nation (21%). From there, we observed a decline in the profile of environmental concerns, and this hit a low of 8% (listing the environment as a top three issue) in September 2014. However, concern about the environment is on the rise again, with December 2018 seeing it take 7th place ranking with 18% once again identifying it as a top issue facing Australia.

Where does Climate Change rank among our nation's issues?



² Environment is defined in the Ipsos Issues Monitor as Environmental/Pollution/Water concerns
³ Quarterly report available: <https://www.ipsos.com/en-au/issues-monitor-0>



Climate Change

Overwhelming acceptance that humans contribute to climate change

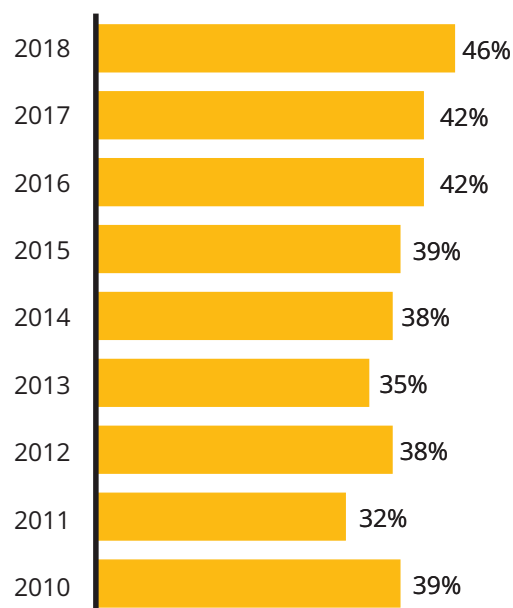
There is strengthening conviction amongst Australians regarding the role of humans in causing climate change.

This year we observed that almost half (46%) of Australians now believe that climate change is *entirely or mainly caused by human activity*. This is the highest proportion of Australians believing this since we started tracking this in 2010. A growing number of us (14%) believe that humans are *entirely* responsible for climate change. In all, 86% believe humans contribute to climate change in some way.

The small proportion of the public that doesn't believe the climate is changing has remained steady. Just 4% of Australians believe that there is no such thing as climate change.

However, Australians sit behind other countries in acknowledging the threats of climate change. Separate polling by Ipsos shows that 72% of Australians think average global temperatures are likely to rise. This compares to the global average of 78%.⁴

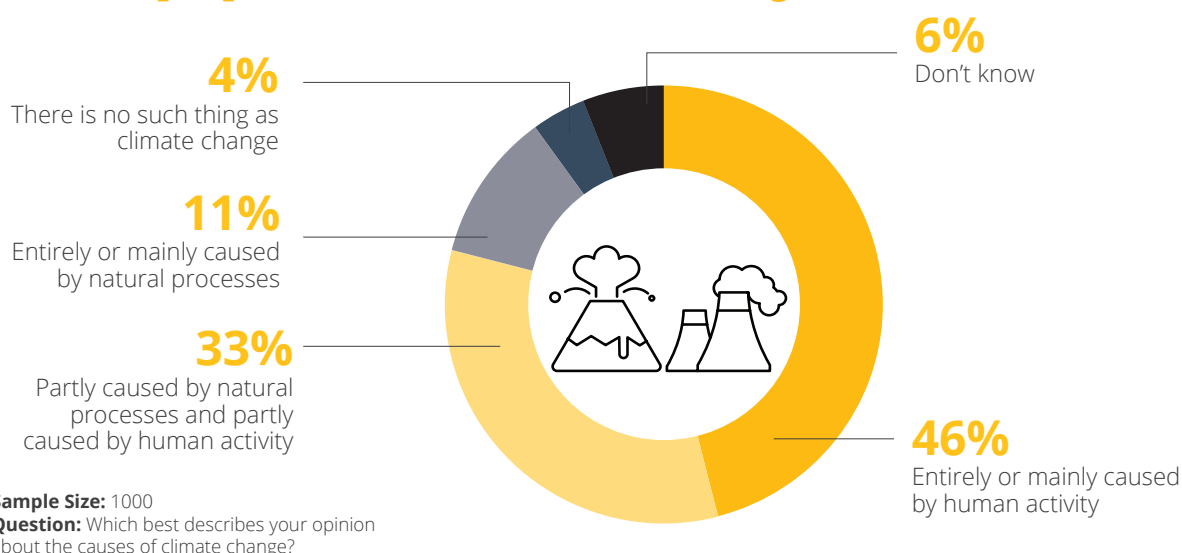
Entirely or mainly caused by human activity



Sample Size: 1000

Question: Which best describes your opinion about the causes of climate change?

What do people think causes climate change?



⁴ Ipsos Global Advisor survey of 21,141 adults in 31 countries conducted in January 2019.

Australia and the international community need to do more to tackle climate change

When asked which environment-related issues they would take action on, 44% of Australians identified climate change, making it the third most commonly identified issue in 2018 behind only renewable energy (57%) and drought (46%). This is very consistent with recent years (with 43% selecting climate change in 2017 and 2016).

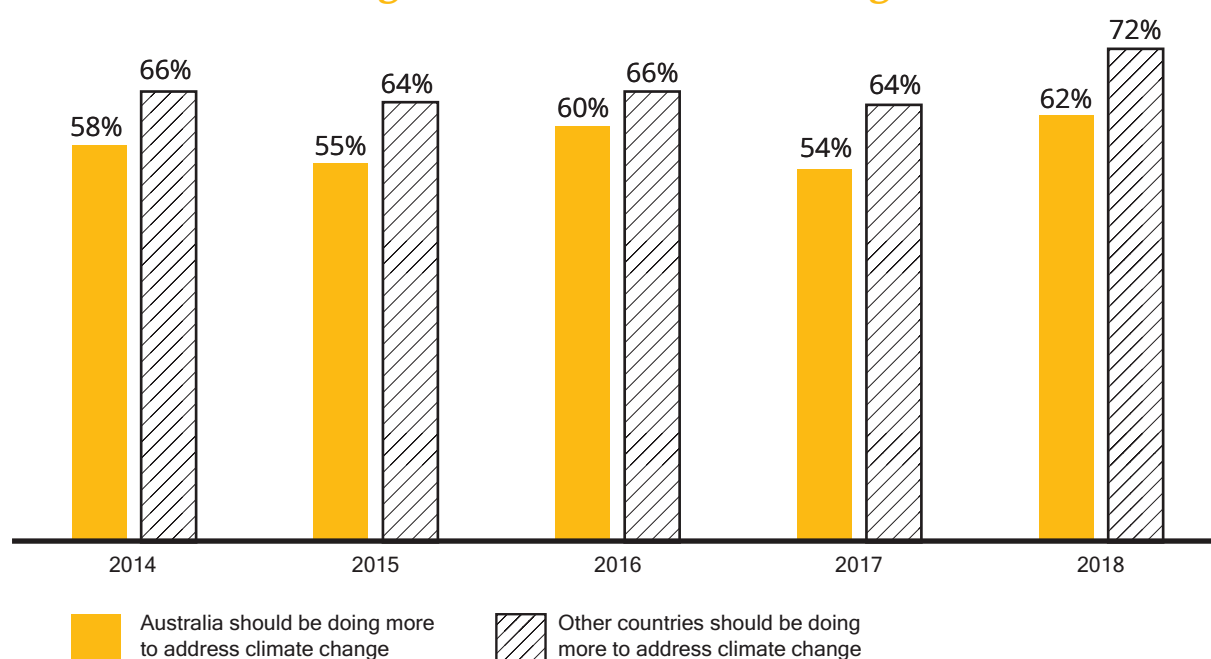
With our high reliance on fossil fuels for energy, Australia is one of the highest emitters of carbon per capita globally.⁵ Nearly two thirds of Australians feel this is an issue that should be addressed, with 62% agreeing that we ought to be doing more to tackle

climate change. Agreement for this measure is the highest since Ipsos started tracking it in 2014 and up sharply compared to 2017 (when 54% agreed).

However, we certainly do not think we should be addressing climate change alone. Australians have always had a strong belief that other countries must also do more to address climate change. In 2018, 72% agreed other countries ought to be doing more to address climate change. This is a significant increase on 2017 when 64% agreed.

The jump in agreement that Australia and the international community need to be doing more is reflected in dissatisfaction with the Federal Government and international community's performance in addressing climate change (detailed on page 20). This public sentiment reflects the UN's recent Emissions Gap Report, which advises that nations must effectively triple their pollution-cutting goals if the world hopes to hold warming below 2°C. It is broadly considered that a global increase in temperature beyond 2°C would be catastrophic.⁶

Who should be doing more about climate change?



Sample Size: 1000

Question: How strongly do you agree or disagree with the following statements?

5 http://edgar.jrc.ec.europa.eu/overview.php?v=CO2ts_pc1990-2015&sort=des9 and <https://www.ucsusa.org/global-warming/science-and-impacts/science/each-countrys-share-of-co2.html#.XEaqSFUzZQI>

6 http://wedocs.unep.org/bitstream/handle/20.500.11822/26895/EGR2018_FullReport_EN.pdf?sequence=1&isAllowed=y

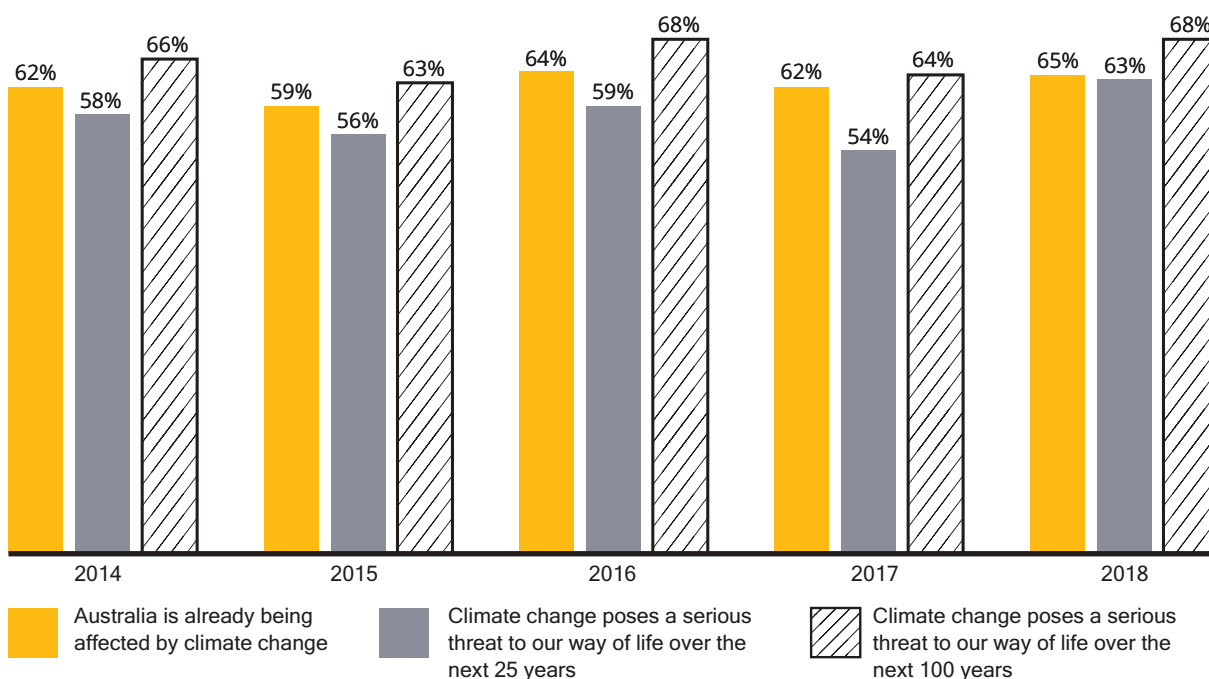
Two thirds think Australia is already being impacted by climate change

In previous decades, the narrative around climate change included the harmful effects of climate change on future generations. Calls for action were often couched in the language of ensuring 'our children's children' would not have to pick up the pieces of the current population's inability to mitigate climate change. However, there appears to be a growing sentiment that climate change has already begun to bite.

Agreement that Australia is already being affected by climate change has reached an all-time high in the current wave of research (65%). Looking to the future, around two thirds agree that climate change poses

a serious threat to our way of life over the next 25 years (63%) and the next 100 years (68%). Since Ipsos started tracking this, a majority of Australians have perceived there to be a major threat from climate change over the next 100 years (with a minimum of 60% agreement since 2010). And while concern about the shorter-term impact of climate change has been slightly more subdued than the longer term, the 63% of Australians who agree that climate change poses a serious threat to our way of life over the next 25 years is also at an all-time high.

Is climate change a threat to our way of life?



Sample Size: 1000

Question: How strongly do you agree or disagree with the following statements?

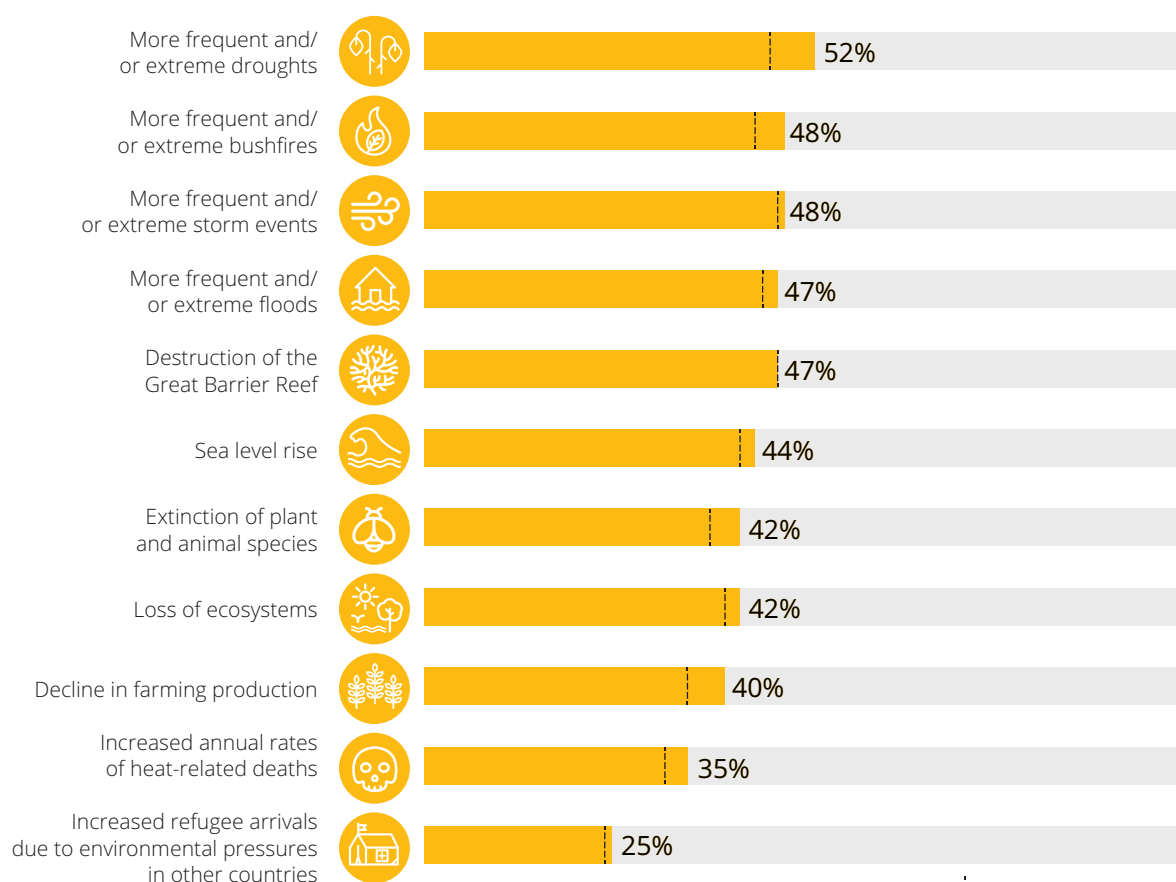
Increasing belief that climate change is already impacting Australia

Each year participants are shown a list of possible environmental impacts and asked which ones they think climate change will trigger and when. The five phenomena that Australians were most likely to identify as already being caused by climate change are more frequent and/or extreme droughts, bushfires, storm events and floods and destruction of the Great Barrier Reef.

Unsurprisingly, given the profile of drought in the last 12 months, there has been a significant increase in the proportion of Australians indicating that they think climate change is already causing more frequent and/or extreme droughts (46% in 2017 vs. 52% in 2018). The same pattern is observed for more frequent and/or extreme bushfires with 44% advising they thought climate change was already causing this in 2017 and 48% in 2018.

What is climate change already causing in Australia?

This chart shows proportion of respondents that believe climate change is already causing each impact.



denotes 2017 results

Sample Size: 1000

Question: In how many years, if at all, do you think climate change will cause the following in Australia?

(Re)emergent issue: Drought

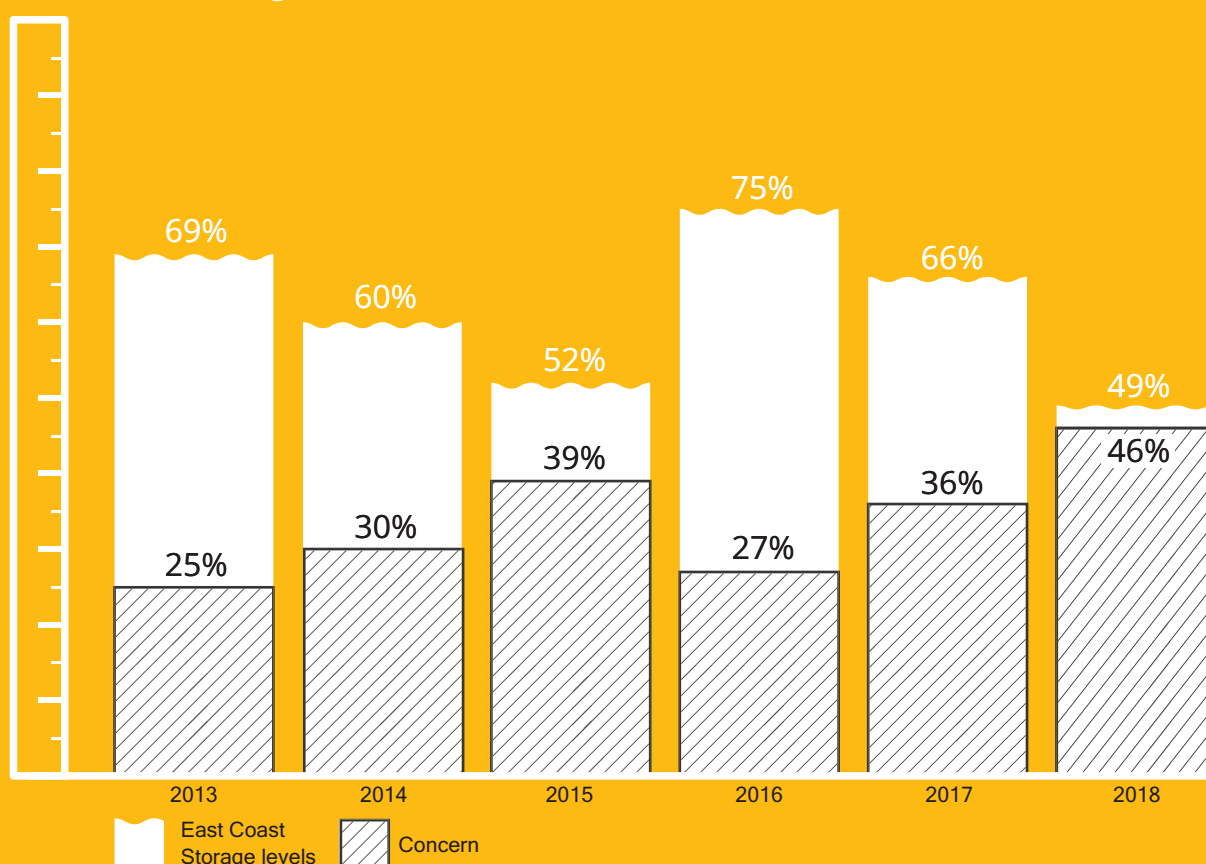
Drought jumped from the 15th most commonly identified environmental issue Australians would take action on in 2017 to an all-time-high of 2nd position in 2018. Almost half, 46%, of Australians advised they would address this issue if they were in charge of decision-making for the country. Drought placed 5th in 2007 and again in 2015 but otherwise has not featured in the top 10 issues since we started collecting this data.

Unsurprising, concern on drought appears to be closely linked to the capacity of water storages along the East Coast. With Queensland and New South Wales experiencing particularly tough drought conditions all levels of government have provided billions of dollars of relief to worst affected

communities and farmers. In addition, a number of charities (including the Red Cross, Salvation Army and Rural Aid's Buy a Bale campaign) have provided further support. Reflecting Prime Minister Morrison's stance that drought is one of the Federal Government's immediate priorities, the Government appointed Major General Stephen Day as the inaugural Coordinator-General for Drought in August of 2018.

Primary industries (agriculture, forestry and fisheries) are particularly sensitive to drought. The more frequent and longer droughts associated with climate change are expected to have significant impacts on agricultural yields putting farmers on the front line of the need to adapt to climate change. Given the more direct impact of drought on regional farming communities, unsurprisingly drought was more likely to be identified as an issue for action by regional Australians (50%) compared with metropolitan Australians (43%).

Levels of storage vs levels of concern



Source: <http://www.bom.gov.au/water/dashboards/#!/water-storages/summary/state>



The 'War on Waste' effect?

The Keep Australia Beautiful organisation has existed for more than 50 years and seeks to reduce litter and promote sustainable communities. The organisation has undoubtedly helped to keep litter and waste on the agenda for Australians over the years.

While illegal waste dumping has always been one of the top 10 environmental issues Australians would take action on if they were making decisions for Australia, household waste has only made top-10 appearances a handful of times since 2007. However, in 2018 household waste leapt back up the list to take the place of the 5th most commonly selected environmental issue Australians would take action on with 41% choosing this issue.

The 2017 and 2018 ABC series, War on Waste, detailed the extent of the problem around a number of waste types in Australia. It was arguably the household waste issue that most struck a chord with viewers (with a sharp increase in the sale of reusable coffee cups and a reduction in the use of single-use plastic bags and straws being linked to the series). The program was viewed by 2.6 million people, took out the Logie for the Most Outstanding Factual or Documentary Program and received the Gold Banksia Sustainability Award and the Banksia Communication for Change Award (prestigious sustainability awards). Perhaps War on Waste is responsible for putting the issue of household waste back on the agenda for Australians.

War on Waste is not the only notable series of recent years shining a light on the potentially catastrophic impact of waste. David Attenborough's much-anticipated Blue Planet II depicted (among other threats) the devastating impact of plastic waste on marine life. The series was watched widely internationally and like War on Waste was critically acclaimed winning a number of awards.

Another issue to gain attention in 2018 was China's implementation of the National Sword policy. The policy substantially tightened quality requirements for the importation of any foreign recyclables and significantly impacted Australia's recycling capacity. This policy, along with the popularity of TV series that put the spotlight on household waste, is likely to have contributed to the increased public awareness of improving recycling practices and reducing household waste.

Renewable Energy

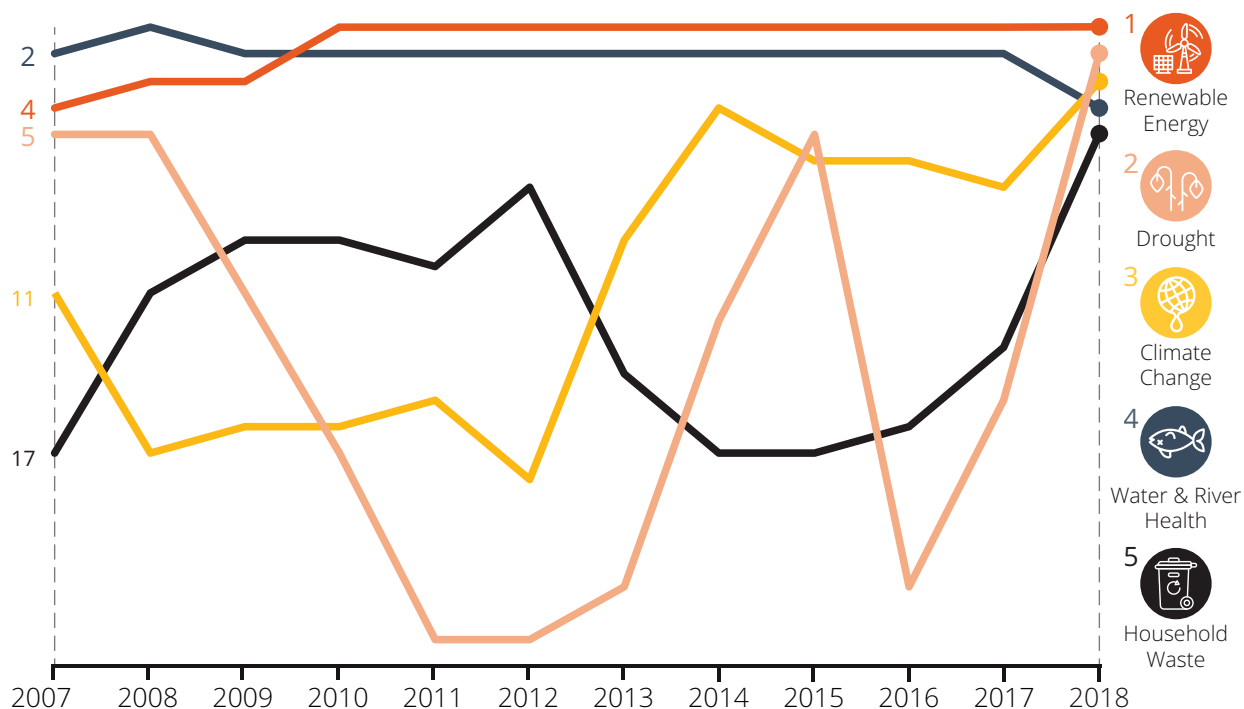
Renewable energy continues as #1 environmental issue Australians would take action on

For the ninth consecutive year, renewable energy is the top environmental issue Australians would act on if they were in charge of decision-making. Well over half (57%) identify renewable energy as an issue they would choose to address. A majority of Australians have identified renewable energy as an issue for action every year since surveying began in 2007 and the 2018 study saw the highest proportion of respondents report renewable energy as a top issue since 2010.

Strong support for increasing power generated from renewables

Energy was a high-profile issue in politics and the media throughout 2018, culminating with the Coalition Government abandoning the National Energy Guarantee framework in August. Despite what has been described in the media as a lack of clear national energy policy,⁷ generation from renewables in Australia has more than doubled in the last decade.⁸ Our findings reveal that, on balance, Australians tend to see more positives than negatives in moving toward renewable energy sources.

The top 5 environmental issues of 2018 and how their ranking has changed over the last 12 years



Sample Size: 1000

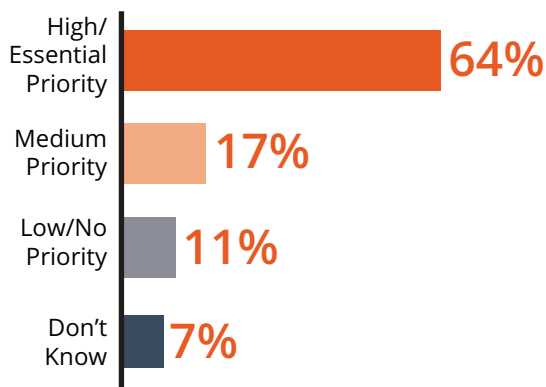
Question: If you were in charge of making decisions for Australia, select the issues below that you would address or take action on by Year

7 For example: <https://www.smh.com.au/business/the-economy/national-energy-policy-not-rocket-science-energy-chief-says-20180913-p503i5.html>

8 <http://www.environment.gov.au/mediarelease/latest-official-australian-energy-statistics-now-available>

Almost two thirds of Australians (64%) think that increasing the amount of power generated from renewable energy sources should be an essential or high priority.

Increasing the amount of power generated from renewable energy sources



Sample Size: 933 (99%)

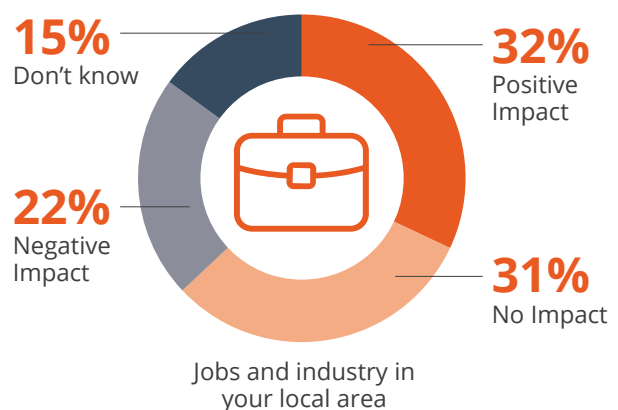
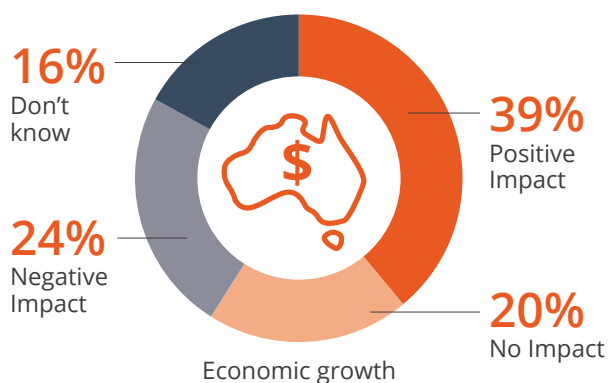
Question: To what extent do you think the following should be prioritised in Australia's climate change and energy policies?

Less than a quarter of Australians think that a shift towards renewables will negatively impact the economy

The financial cost to decarbonise the energy system in Australia has long been raised as a negative consequence of moving to renewables. Indeed, a quarter of Australians (24%) indicate that reducing the dependency on coal would have a negative impact on economic growth.

However, 39% feel that a shift to renewables would positively impact economic growth. Similarly, 32% believe that jobs and industry in their local area would be positively impacted; only 22% believe that a shift to renewables would have a negative impact on local jobs and industry.

Economic impact of transitioning to renewables



Sample Size: 1000

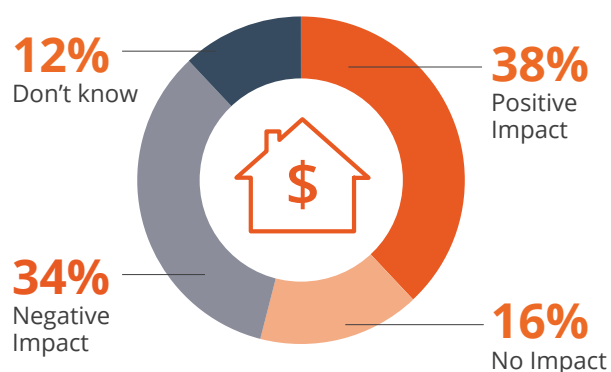
Question: How do you think reducing the number of coal-fired power stations and increasing the amount of power generated from renewable energy sources such as solar and wind is likely to impact the following?

Only a third of Australians think that a shift towards renewables would negatively impact energy affordability

While the ongoing increase in household energy prices is well documented, the notion that increasing the share of renewable energy supplied will lead to higher household energy bills is more likely to be rejected than not. A third (34%) believe their household energy bill affordability would be negatively impacted, 16% think there would be no impact and around 38% believe these bills would be more affordable as the share of renewable energy increases.

These results align with the upsurge in Australians looking to take control of their energy bills by installing solar panels – two million homes throughout the country now have rooftop solar.⁹

The affordability of your household energy bills



Sample Size: 1000

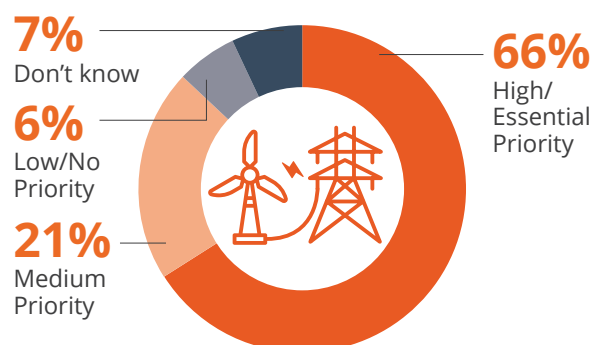
Question: How do you think reducing the number of coal-fired power stations and increasing the amount of power generated from renewable energy sources such as solar and wind is likely to impact the following?

Two thirds of Australians think that managing energy supply should be a high priority

2018 saw a marked shift in the public discourse around the implications of shifting away from a carbon intensive economy and increasing Australia's reliance on renewable energy sources. As debate continued around the economic consequences of diversifying Australia's energy sources, there were concerns raised that shutting down coal power stations would cause widespread power outages and foster vulnerabilities in household power supply. Wide-scale blackouts that hit South Australia during the 2016/17 summer period fuelled the discussion, as the reliability of an electricity network with a reliance on renewable energy was called into question.

Energy security became a hot topic, and this was reflected in the research with two thirds (66%) indicating that they see *managing energy supply shortages and ensuring supply of energy is not interrupted by blackouts* is an essential or high priority.

Managing energy supply shortages and ensuring supply of energy is not interrupted by blackouts



Sample Size: 1000

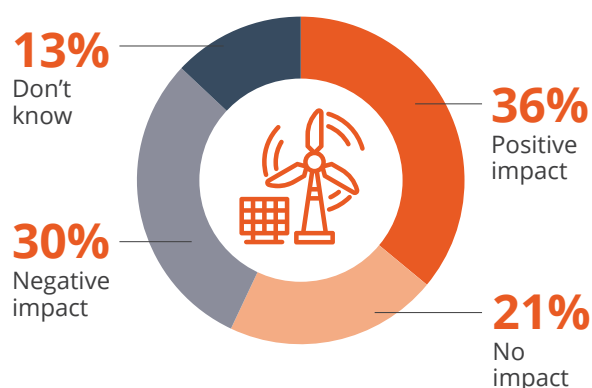
Question: To what extent do you think the following should be prioritised in Australia's climate change and energy policies?

9 <http://www.cleanenergyregulator.gov.au/ERF/Pages/News%20and%20updates/News-item.aspx?ListId=19b4efbb-6f5d-4637-94c4-121c1f96cfe&ItemId=589>

Less than a third of Australians think that the reliability of energy supply would be negatively impacted by a shift towards renewables

When asked how they thought shifting away from coal and towards renewables would impact the reliability of energy supply, 36% indicated that they believe it would have a positive impact. A fifth (21%) believe there would be no impact, while 30% anticipate a negative impact. With Tesla completing construction of its lithium-ion battery in South Australia in late November 2018 and the world's largest battery already being heralded as stabilising the network and helping to prevent blackouts in South Australia, we may see this support grow in the future.

Reliability of energy supply



Sample Size: 1000

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?

Is now the time to capitalise on the popularity of renewable energy in the climate debate?

The results of this study, in conjunction with the marked increase in Australian investment in renewable energy by state governments, big business and households throughout the country signify that the Australian public may be beginning to turn away from coal-fired energy.

Concerns around financial costs and reliability are certainly present. However, the desire for government to address climate change, and the optimism surrounding the positive impacts of moving towards a greater share of renewable energy present a growing mandate to government to move forward with energy policy that supports climate change mitigation strategies.

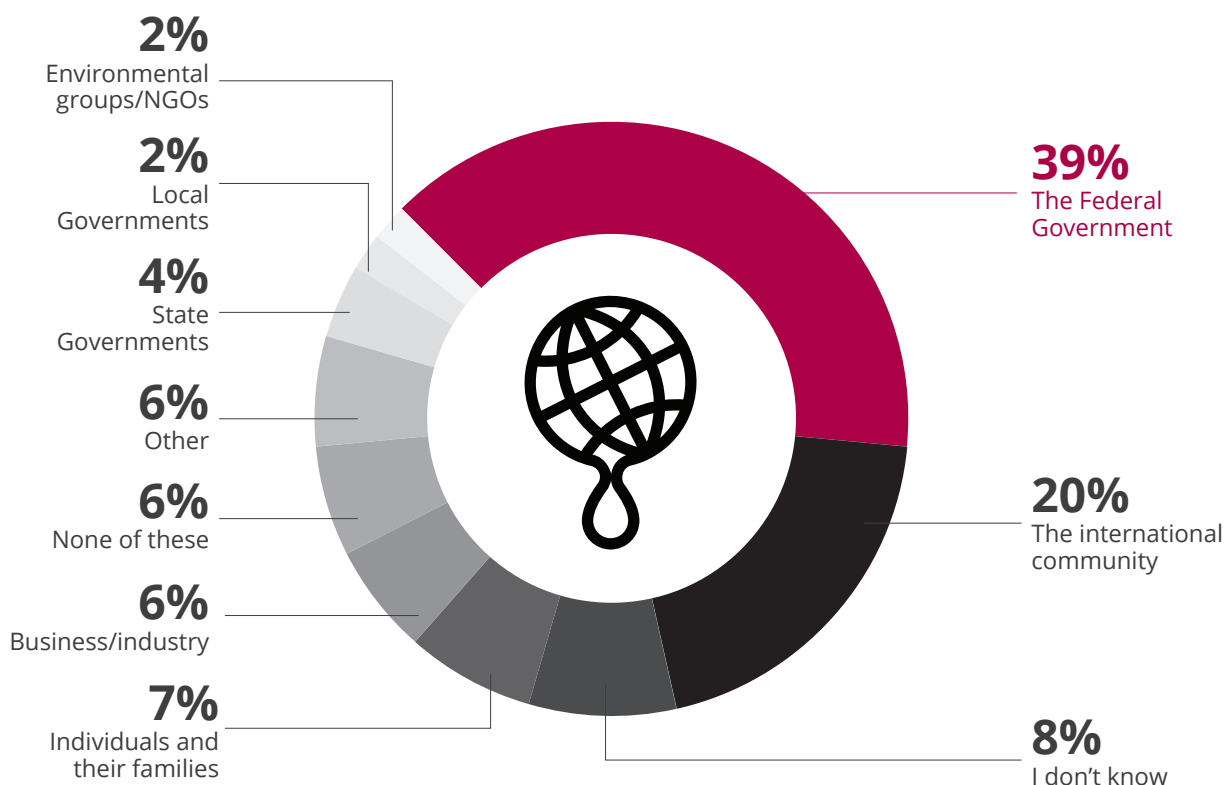
Australia's appetite for a stronger response to climate change continues to increase and unlike some of the narrative around carbon taxes, energy guarantees and carbon trading schemes, renewable energy has the advantage of enjoying strong public support. As both sides of politics continue to fight a battle on the best way to meet energy needs and emissions targets, Australians are getting behind renewable energy.

Leadership and performance on climate change

The Federal Government is considered most responsible for action on climate change – but Australians more likely to think the Federal Government is doing a poor job

As in previous waves of this research, the Federal Government is most likely to be identified as having main responsibility for addressing climate change. Two-in-five (39%) selected Federal Government compared with the international community (20%) and individuals and their families (7%).

Who should be responsible for action on climate change?



Sample Size: 1000

Question: Who should be mainly responsible for action on climate change?

Australians are not convinced that there are any effective performers in terms of addressing climate change among government, industry and the international community. For each, Australians are more likely to indicate that performance was poor than good. Around a third feel that the performance of the five groups we tested is neither good nor poor.

Furthermore, we are becoming more critical of action on climate change. With the exception of local government (for which we asked about performance for the first time in 2018), Australians were significantly more likely to rate each of the groups' performance as poor in 2018 compared with 2017.

Australians are almost four times more likely to feel that the Federal Government (which is considered most responsible for action on climate change) is performing poorly than well on managing climate change (50% fairly or very poor compared with 13% fairly or very good). The same situation is apparent for the international community for which 46% advised fairly or very poor performance compared with 12% fairly or very good. The worst performing entity in the eyes of Australians is business and industry, 54% advised they thought performance was fairly or very poor (12% fairly or very good).

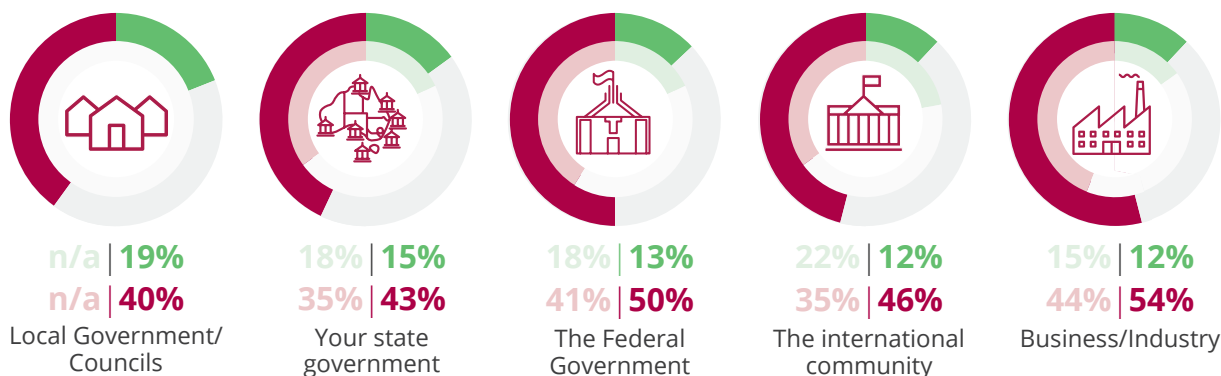
Despite not carrying the weight of being mainly responsible for action on climate change, local government is perceived as performing better than the other groups tested. And although 40% thought performance was fairly or very poor, one-in-five (19%) considered local government performance to be fairly or very good.



Students put the heat on climate action

In August 2018, Swedish school pupil, Greta Thunberg, took a public stand against global leaders' inertia on climate change. Instead of going to school, she protested outside the Swedish Parliament until the country caught up on its commitments under the Paris Agreement. Thunberg's protest gathered international support with more than 20,000 school students showing solidarity and striking across Europe, Australia, USA and Japan.¹⁰

Perceived climate action performance



Sample Size: 1000

Question: How would you rate each of the following groups in terms of the actions they have taken in response to climate change? 2 by Year 2017 vs 2018 % rate each group 'good' or 'very good'

2018 Fairly/Very Poor 2018 Fairly/Very Good
2017 Fairly/Very Poor 2017 Fairly/Very Good

10 <https://www.abc.net.au/news/2018-11-30/australian-students-climate-change-protest-scott-morrison/10571168>



Committing to the Paris Climate Agreement

Australia has been a signatory to the Paris emissions reduction targets set in 2015 and although opinions on the nation's progress in meeting these targets is disputed, half of Australians (49%) feel that honouring the Paris Climate Agreement should be a key priority (essential or high), only one-in-ten (11%) felt this should not be a priority.

Furthermore, 40% would like to see an emissions reduction target set that goes beyond reducing emissions by 26%-28% on 2005 levels by 2030 as set out in the Paris agreement.

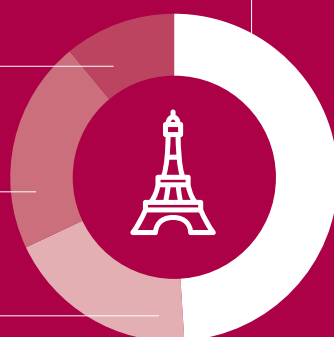
What should Australia's priorities be?

49%
High/Essential
Priority

11%
Don't
know

21%
Low/No
Priority

19%
Medium
Priority



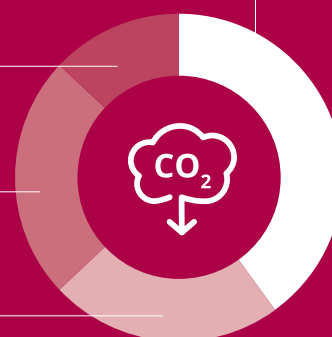
Honouring the Paris Climate Agreement

40%
High/Essential
Priority

12%
Don't
know

24%
Low/No
Priority

23%
Medium
Priority



Setting an emissions reduction target that is more ambitious than the Paris Climate Agreement

Sample Size: 1000

Question: To what extent do you think the following should be prioritised in Australia's climate change and energy policies?

Note: percentages may not add up to 100% due to rounding

Contact

If you would like to know more about the Ipsos Climate Change Report or Ipsos Public Affairs, please contact Stuart Clark or Jennifer Brook.

Jennifer Brook

Director

e. Jennifer.Brook@ipsos.com

p. (02) 9900 5100

Stuart Clark

Director

e. Stuart.Clark@ipsos.com

p. (02) 9900 5100

www.ipsos.com.au
[@_ipsos](#)

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GAME CHANGERS

