

The Ipsos

CLIMATE CHANGE REPORT 2022

April, 2022

GAME CHANGERS



CONTENTS



1. Issues landscape



2. Issues landscape – the election



3. Emissions policy and leadership



4. The role of business



5. The role of individuals

ADDITIONAL CONTEXT

This survey was conducted over the period of 25 – 30 March 2022. The following notes are important for context:

- The survey was conducted within the same month of significant rainfall and destructive flooding events throughout Queensland and New South Wales (early March 2022).
- Significant increases in fuel costs through March peaked at well over \$2/L in most states and territories (its highest peak ever noted).
- The COVID-19 pandemic has had long term impacts on not only health but increased pressure on housing and cost of living.
- Prior to the disruption of COVID-19 in early 2020 there were a few notable events rising the profile of climate change and the environment. This included significant media attention on Greta Thunberg and the 2019/2020 Black Summer bushfires.
- Australia is poised to have a federal election in May 2022, its first federal election since May 2019. The last federal election pre-dated all of above significant events.
- In the period just post survey fieldwork the UN released its third report on the Mitigation of Climate Change from the Intergovernmental Panel on Climate Change (IPCC) outlining comprehensively halt global warming. Australia is also due for its 5 year update of the Australia State of the Environment report last issued in 2016.



ISSUES LANDSCAPE

1

THE COVID-19 PANDEMIC AND RISING COST OF LIVING HAVE IMPACTED THE RELATIVE IMPORTANCE OF THE ENVIRONMENT

Since 2010, the *Ipsos Issues Monitor* has been tracking public sentiment by asking a representative sample of 1000 Australians monthly 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 at this time.

Since January 2020, the Covid-19 pandemic and all its subsequent challenges on the economy and logistics has had a marked impact on our priorities.

In March 2022, the cost of living and healthcare are the top two issues facing the nation by a comfortable margin. The significant jump in fuel prices in Qrt1 2022 has also been of concern for Australians and it is the 5th most important issue currently overtaking the environment which has been relegated to 6th.

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



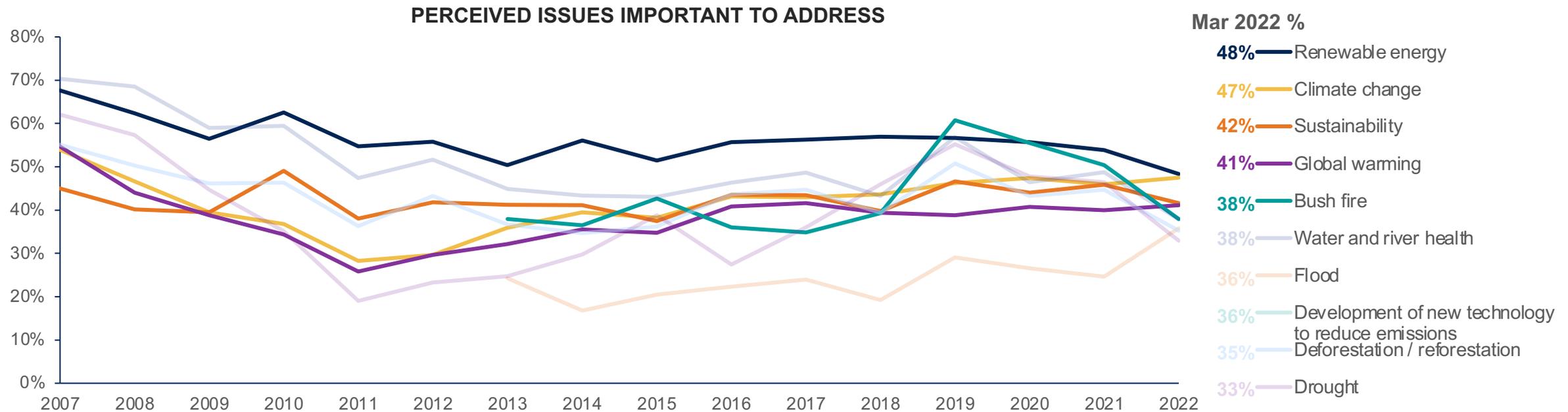
CLIMATE CHANGE CONTINUES TO INCREASE IN PRIORITY AND IS SECOND IN TERMS OF ISSUES REQUIRING ACTION

Each year Ipsos surveys more than 1000 Australians for the *Ipsos Climate Change Report*. Since 2007, we have been asking which environmental issues they would take action on if they were making decisions for the nation.

In 2022, the top environmental issues that Australians would like to action on are renewable energy (48%), climate change (47%) and sustainability (42%). Renewable energy has been the primary issue that Australians would like to see action on since 2010; however this has waned over the past 15 years. General concern about climate change has gradually increased since bottoming out at 28% in 2011 following the global financial crisis.

The data shows that concern for natural disaster events (i.e. bushfires, drought, floods) peaks during the periods that see significant events. In 2019 and 2020, Australians were particularly concerned with bushfires and drought (with significant events noted in these years). Fast-forward to 2022 and concern about floods has peaked at 36% in contrast to its historical data.

New to the monitor, the 'development of new technology to reduce emissions' enters the ranking at #8 from a list of 32 prompted issues. Over one third (36%) of Australians would like to see action taken on prioritisation of new technology designed to reduce emissions.



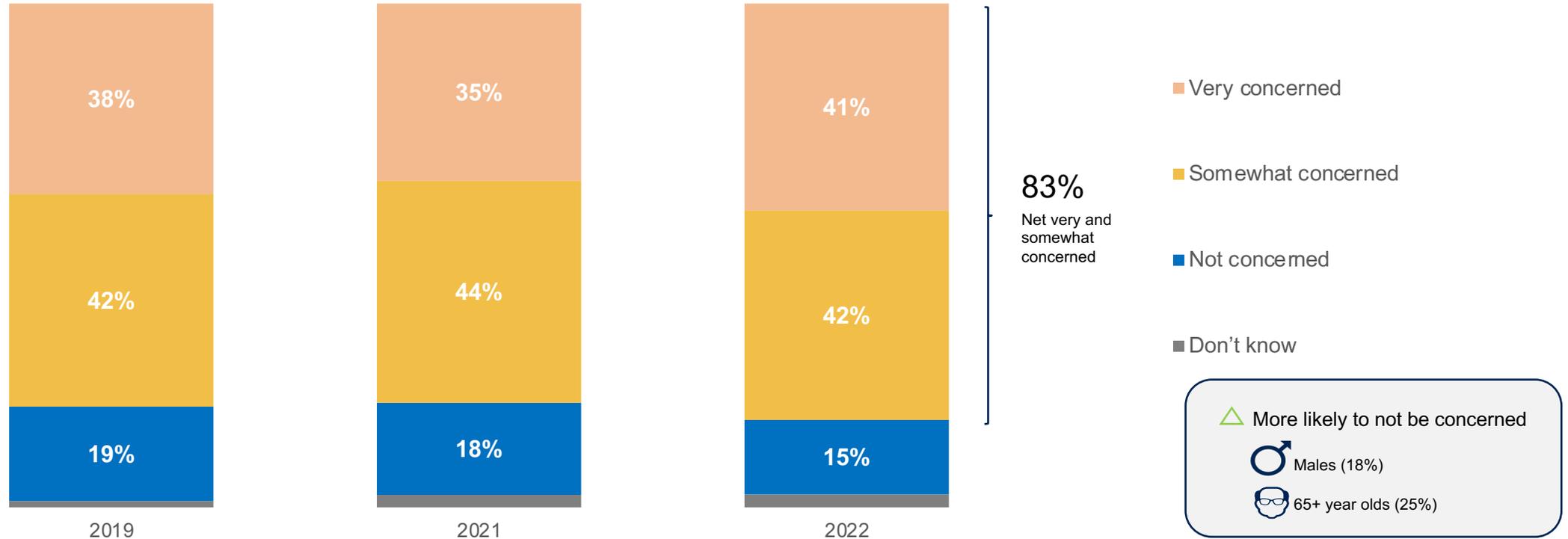
THE MAJORITY OF AUSTRALIANS ARE CONCERNED ABOUT CLIMATE CHANGE

When asked specifically, over four in five (83%) Australians are concerned about climate change with two in five being very concerned. Although strength of concern has increased in 2022 overall concern remains relatively similar to prior levels.

Only 15% of Australians are not concerned about climate change. People aged over 65 years are significantly more likely to state they are not concerned about climate change. Males are also statistically more likely to say they are not concerned (18% compared to 11% among females).

There is no difference in this perception regardless of whether they live in metropolitan or regional areas of Australia (in 2022, 82% of regional residents are concerned compared to 83% of residents in major metropolitan areas).

LEVEL OF CONCERN ABOUT CLIMATE CHANGE



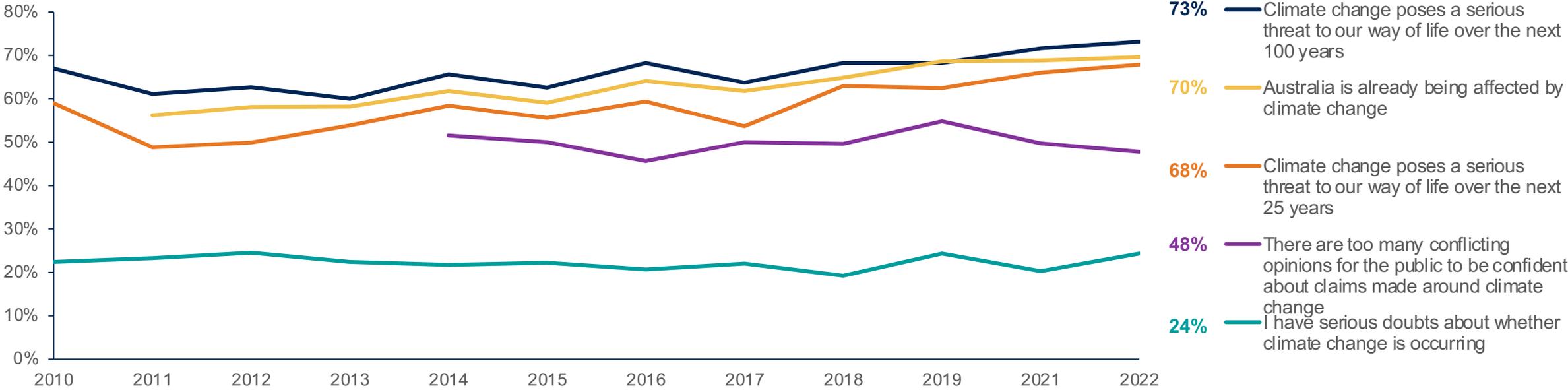
AGREEMENT THAT CLIMATE CHANGE IS A SERIOUS ISSUE ALREADY AFFECTING AUSTRALIA CONTINUES TO INCREASE

More than two-thirds (68%) of Australians agree that climate change poses a serious threat to our way of life over the next 25 years and 70% agree that Australia is already being affected by climate change. Agreement with these sentiments continue to increase year on year.

However, the multiplicity of voices in the public domain still causes doubt for many Australians. Almost half of those surveyed (48%) consider there are 'too many conflicting options for the public to be confident about claims' and approximately one quarter (24%) of Australians have 'serious doubts about whether climate change is occurring'. This level of uncertainty on the issue of climate change has been consistent for close to a decade despite increases in acknowledgement of climate change among those who were previously undecided on this issue. NSW residents are significantly more likely to have serious doubts about whether climate change is occurring (32%).

AUSTRALIAN'S ATTITUDES TOWARDS CLIMATE CHANGE

Mar 2022 %

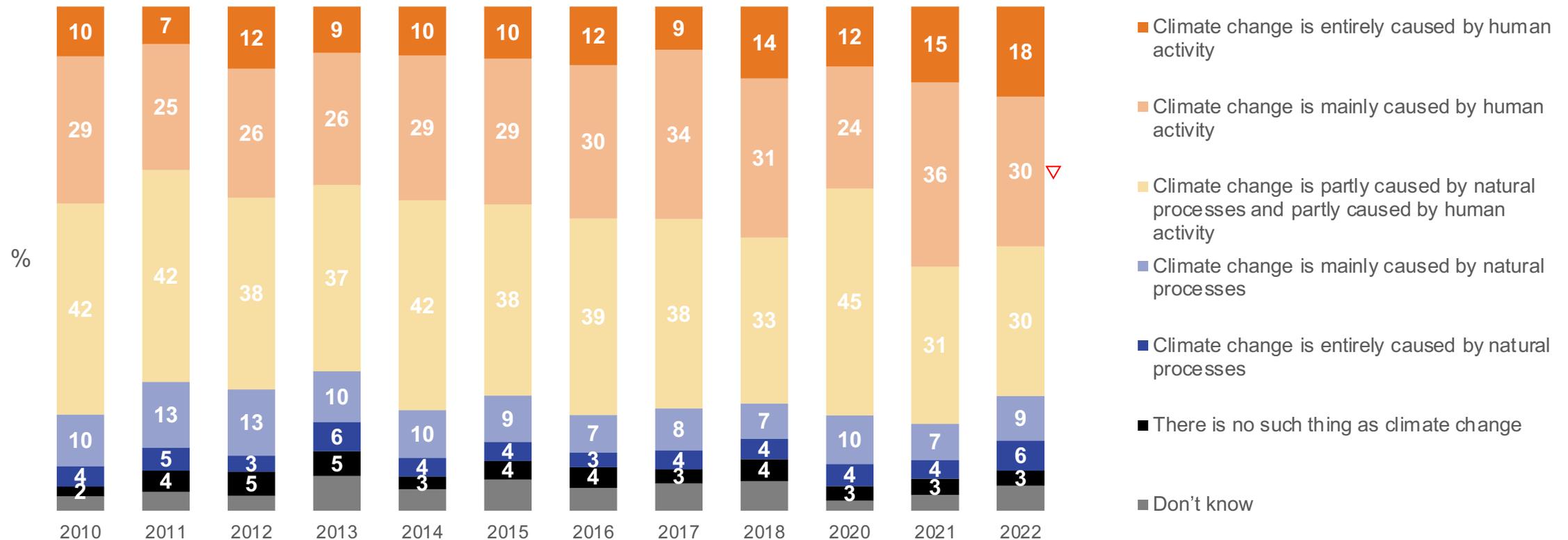


MARCH 2022 SEES THE GREATEST BELIEF THAT CLIMATE CHANGE IS CAUSED ENTIRELY BY HUMAN ACTIVITY

Although there is a perception by 45% of Australians that climate change is caused in part or wholly by natural processes; 78% of Australians consider that human activity has a role to play in causing climate change (with 18% considering climate change is entirely caused by human activity).

This shift of attribution of human activity as a casual factor shows a gradually strengthening trend since 2010, with 48% currently considering climate change is mainly or entirely caused by human activity up from 39% in 2010.

OPINION ABOUT THE CAUSES OF CLIMATE CHANGE

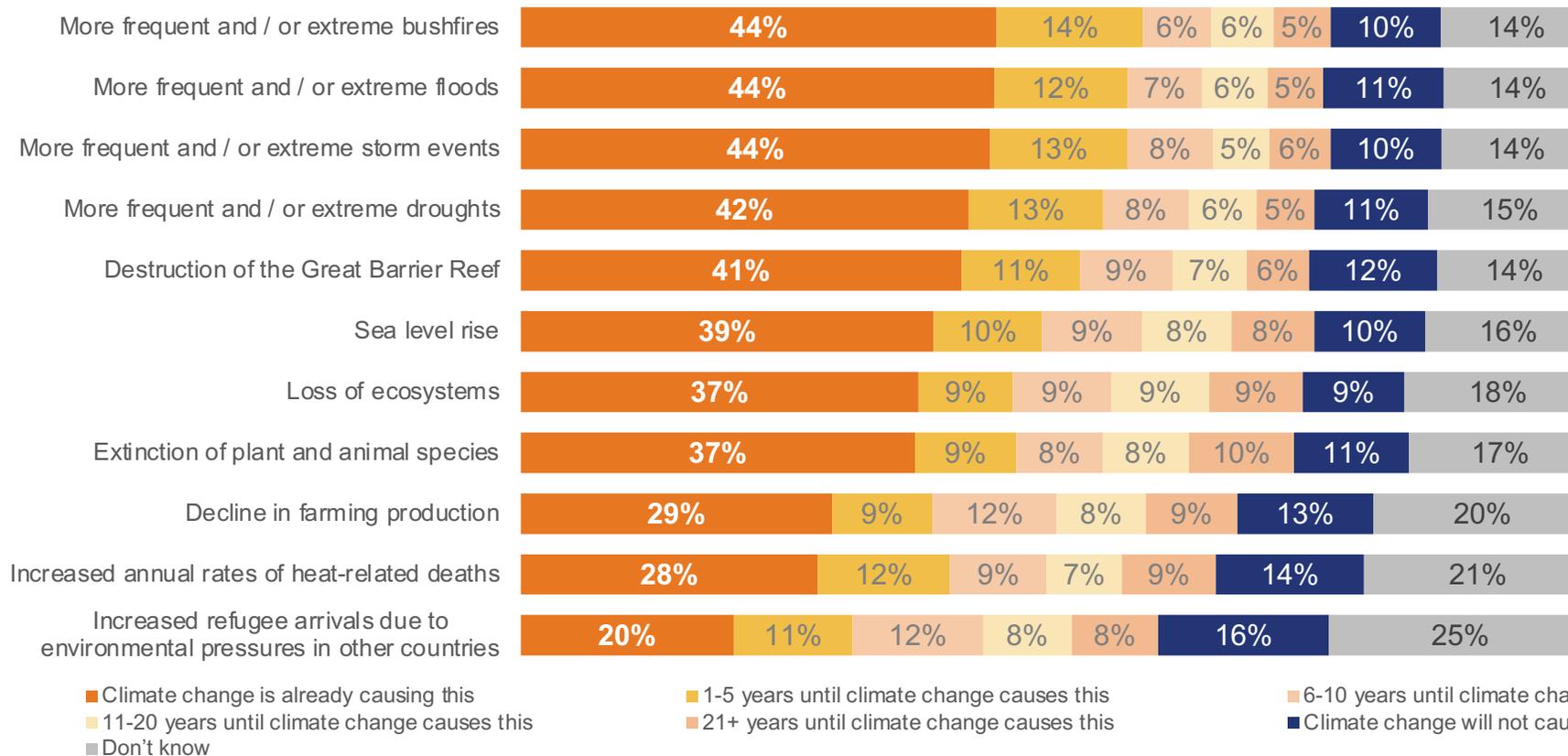


NATURAL EVENT IMPACTS ARE CONSIDERED THE CURRENT EVIDENCE OF CLIMATE CHANGE

Approximately two in five Australians consider that natural event impacts are already being caused by climate change and a further one in five consider climate change will increase frequency and severity of natural events within the next 10 years. Australians from both metro and regional areas hold similar views on what current impacts there are (there are slight differences but none that are statistically significant).

Historical data from 2021* shows that the link between current natural events and climate change has been widely held in recent years; however, discrete perceptions related to one event type or another is heavily influenced by the most recent type of natural disaster impact i.e. floods are much more top of mind after QLD and NSW flooding in early 2022.

WHAT IMPACTS IS CLIMATE CHANGE HAVING NOW vs. SHORT TO MEDIUM TERM



Perception climate change is already causing this - by region

Capital cities	Major Regional Cities	Outer regional / rural/ remote
43%	50%	42%
43%	50%	40%
43%	48%	41%
40%	45%	43%
41%	46%	36%
36%	45%	36%
37%	42%	32%
36%	41%	33%
27%	36%	27%
27%	33%	22%
20%	23%	14%



ISSUES LANDSCAPE - THE FEDERAL ELECTION

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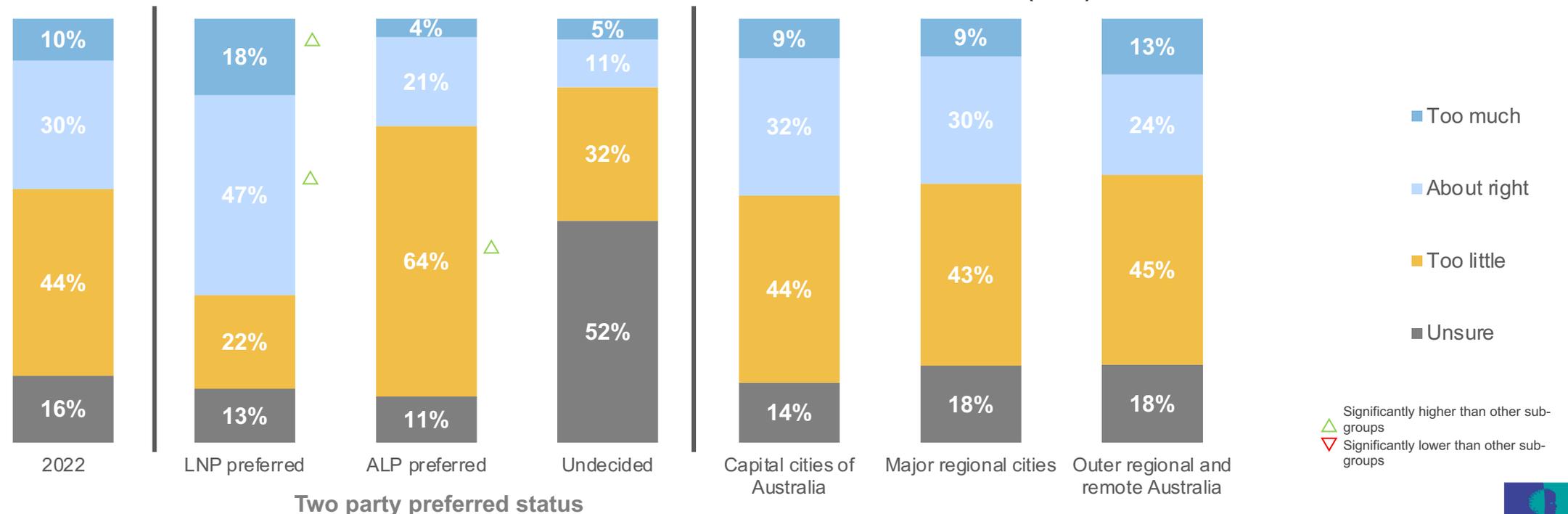
REGIONAL AUSTRALIANS HAVE SIMILAR DIVIDED PERCEPTIONS ON THE CURRENT MEASURES BEING TAKEN AS THOSE IN MAJOR CITIES

With the federal election looming, we included questions related to perceived performance and policy with respect to political parties. Opinions are divided as to whether current measures are sufficient and this is significantly influenced by underlying two party preferred status.

Close to half of Australians (44%) consider that the Federal Government's current measures to address climate change are 'too little'. Just under a third (30%) consider them 'about right', while only 10% believe they are 'too much'. As would be anticipated, this is heavily influenced by underlying political party preference, with those who have a two party preference towards the ALP being significantly more critical of the current government's measures.

Despite feeling the impacts on natural disasters to a greater degree, regional Australians hold similar views to those living in major cities about whether the Federal Government's measures are sufficient. NSW residents are significantly more likely to agree that the Federal Government's measures are 'about right' (37%). South Australians and Tasmanians are slightly more critical with 53% and 50% of these residents stating the measures are 'too little' (but this is not statistically significant based upon sample sizes available.)

PERCEPTIONS REGARDING CURRENT MEASURES TO ADDRESS CLIMATE CHANGE (2022)



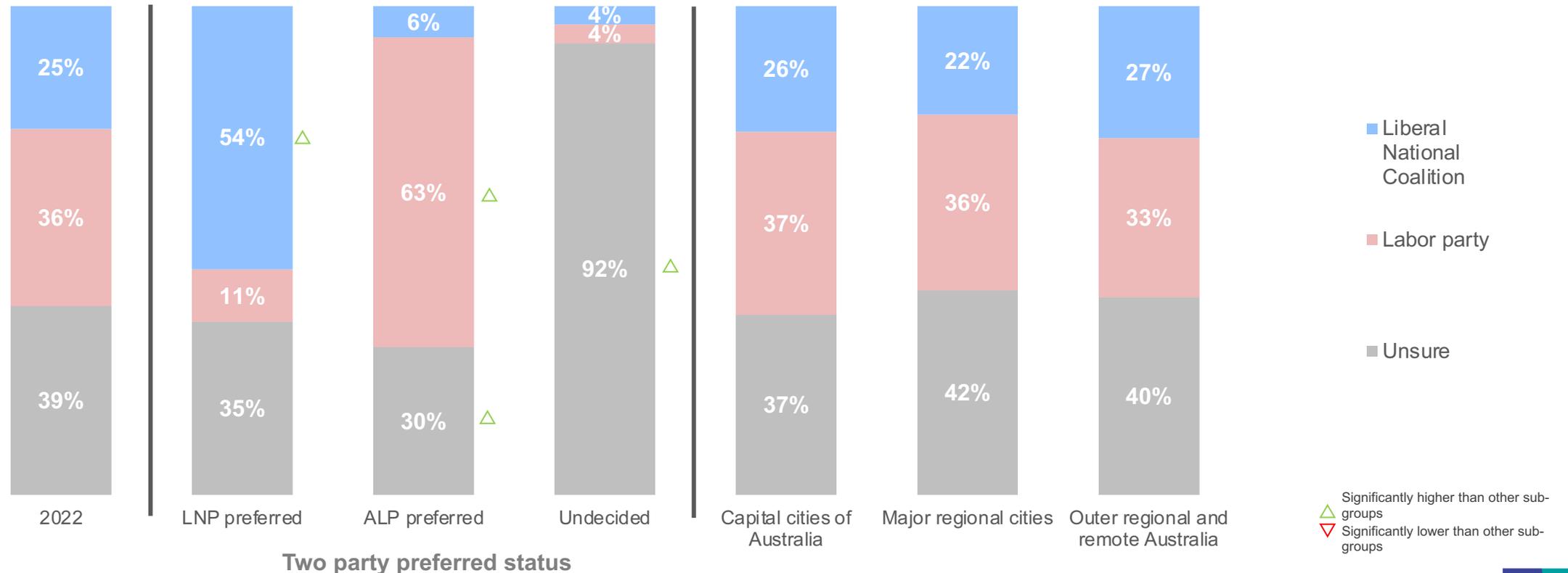
AUSTRALIANS ARE NOT OVERLY AWARE OF THE VARIOUS POLICIES RELATED TO CLIMATE CHANGE ISSUES

A question was asked regarding which political party was perceived to have the best policy on climate change.

Two in five (39%) Australians were unable to select a party, 36% nominated the Labor party and 25% nominated the Liberal National Coalition. As anticipated, underlying two party preferred status heavily influences these perceptions. It is notable that 11% of LNP supporters believe that Labor has a better climate change policy, compared to 6% of Labor supporters who rate the LNP policy more highly.

Again, regional Australians have similar opinions broadly as Australians living in major cities about which party has the best policy regarding climate change.

PERCEPTIONS REGARDING WHICH PARTY HAS BEST POLICY WITH RESPECT TO CLIMATE CHANGE (2022)

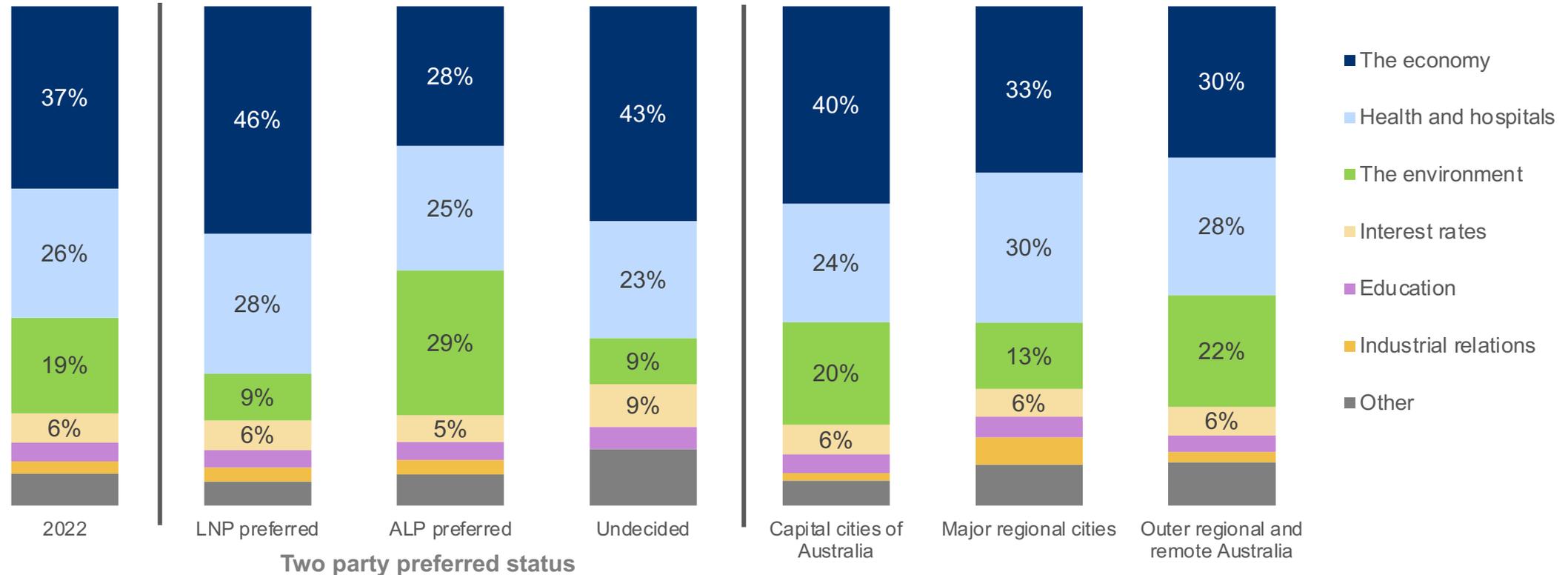


ONE IN FIVE AUSTRALIANS PLACE PRIORITY ON ENVIRONMENTAL ISSUES WHEN CONSIDERING THEIR VOTING PREFERENCES

Prior to asking any questions about climate change and government performance, we posed a question to gauge where the environment rates in Australians' consideration of issues when determining who to vote for (as a forced single response).

At an overall level, the economy and health & hospitals outrank the environment. However 19% of Australians nominated the environment as the most important issue for personally deciding who they would vote for. This pattern of priority was similar across Australia with one in five metropolitan and outer regional Australians indicating the environment was the most important issue personally in determining their voting preferences. As with the other political questions this question's results differed significantly based upon current two party preferred status. Among ALP preferred, the environment ranks as equally important as the economy. Whereas, among LNP preferred 'the economy' is of clear personal importance when deciding on who to vote for.

WHERE ENVIRONMENT RANKS AS AN ISSUE FOR VOTING IN NEXT ELECTION



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

Two questions were asked to gauge perceptions of current performance and the degree of power that these entities have to make change on climate change.

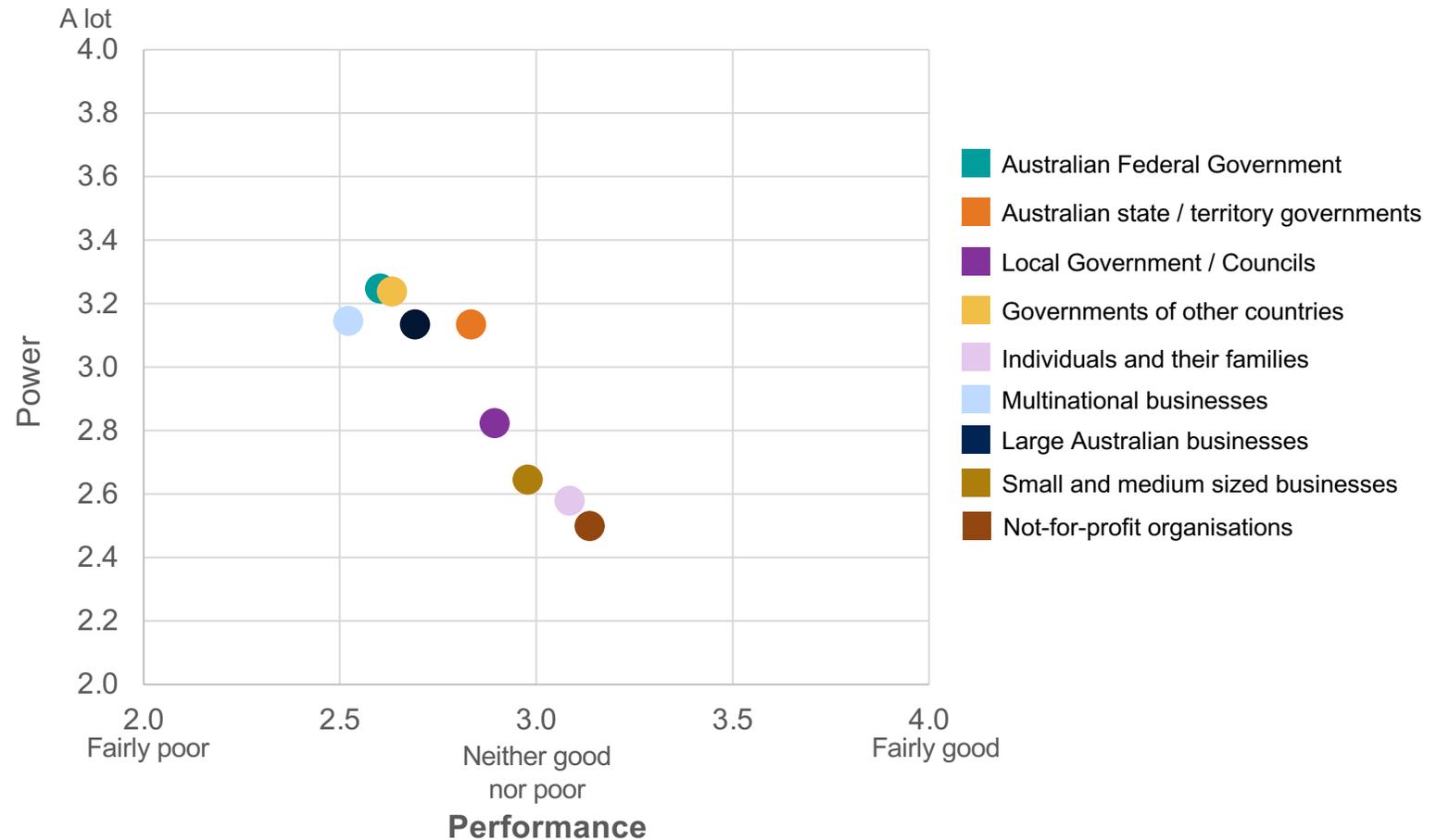
The groups seen to be the most capable of influencing climate change were also seen as performing the poorest overall.

The Australian federal and state / territory governments, governments of other countries, multinational businesses and large Australian businesses were seen as the most capable of influencing action of climate change.

On the other hand, SME's, individuals, and not-for profits were viewed as having the least ability to influence change.

Multinational businesses were rated the lowest for performance, followed by the Australian Federal Government and governments of other countries.

Of all levels of government, local government / council was seen as performing slightly better (similar to state and territory governments) but having less power to influence climate change.





EMISSIONS POLICY AND LEADERSHIP

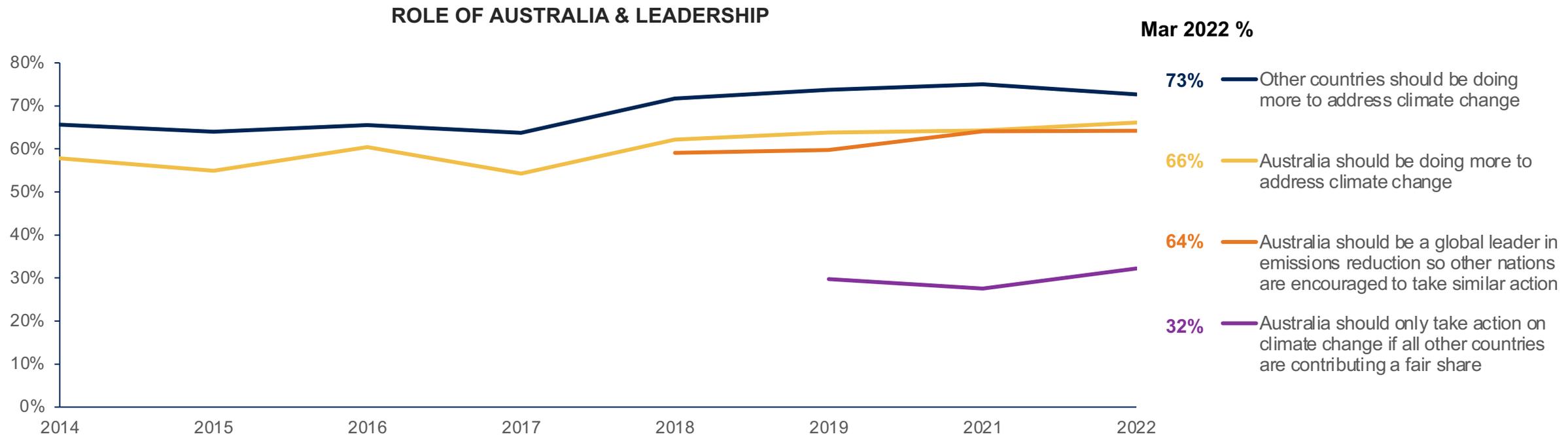
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THERE IS STRONG SUPPORT FOR AUSTRALIA TAKING A LEADERSHIP ROLE ON CLIMATE CHANGE

Australians strongly support the idea of the Australian government taking a global leadership role on climate change.

In 2022, 64% of Australians agree that 'Australia should be a global leader in emissions reduction' with the aim of encouraging other countries to take similar actions (up 5% from 2018). Just over a third (34%) strongly agree, whilst just 14% disagree with this positioning.

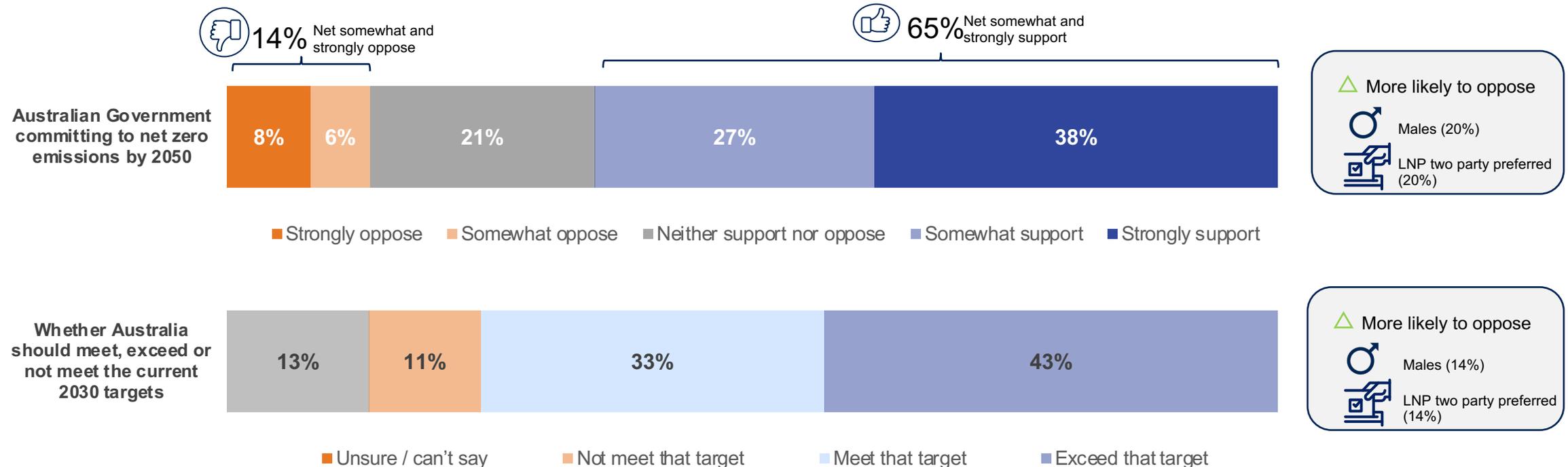
In contrast to this, 32% agree that 'Australia should only take action on climate change if other countries are contributing a fair share'. Although there remains a clear expectation that 'other countries should be doing more to address climate change' as well (73%).



TWO THIRDS OF AUSTRALIANS SUPPORT THE UPDATED COMMITMENT TO NET ZERO EMISSIONS BY 2050

In 2022, Australians were asked about their level of support for the Australian Government's new commitment to targets for the Paris climate agreement to achieve net zero emissions by 2050 from the Australian economy (ratified in late 2021).

Australians show high levels of support (65% net support) for the Government taking actions to meet Paris climate agreement commitments of achieving zero net emissions by 2050. In addition, 76% of Australians believe we should aim to meet or exceed the current 2030 targets to reduce emissions by 25-28% below 2005 levels.



Over half of Australians (60%) agree that in the long run, the nation will be better off it meets its Paris agreement targets and 55% consider that the 'costs of acting on climate change is lower than the cost of not acting on climate change'. The key concerns for Australians related to meeting the Paris agreements targets revolve around potential for increased costs to energy and fuel (35% consider there will be an unacceptable negative impact on these prices as a result of meeting the Paris agreement) over and above other potential negative outcomes.

△ Significantly higher than other groups
▽ Significantly lower than other groups

Question: In 2021, Australia updated its commitments under the Paris Climate Agreement to achieve net zero emissions 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 Australia taking actions to meet its commitments under the Paris Agreement. (Mar 2022)

Question: Australia already has a 2030 target of reducing emissions by 26 to 28 per cent below 2005 levels. Do you think we should aim to exceed that target, meet that target, or not meet that target? (Mar 2022)

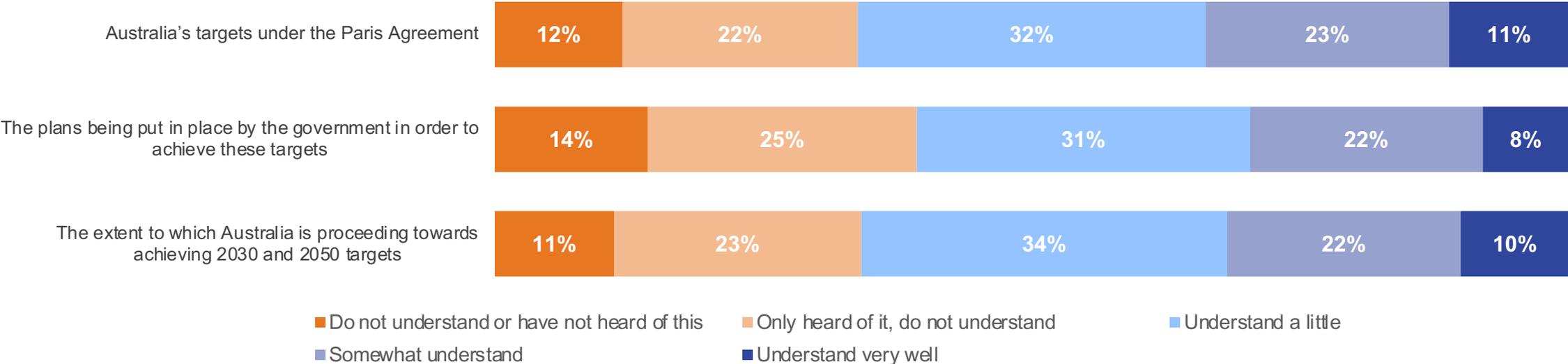
THERE IS OPPORTUNITY TO FURTHER INFORM AUSTRALIANS AS TO WHAT IS BEING DONE TO MEET THE PARIS AGREEMENT

In 2022, in addition to measuring level of support for the Paris agreement targets, we measured the degree of understanding related to the Paris agreement.

Approximately one third of Australians have a moderate to high level of understanding of details related to the Paris agreement (34% somewhat understand or understand very well).

One third (34%) do not understand or have never heard of Australia’s targets prior to this survey and 39% do not understand or have never heard of any of the government’s plans being put in place to achieve Australia’s targets.

DEGREE OF UNDERSTANDING OF PARIS AGREEMENT



MOVING TO RENEWABLES IS INCREASINGLY SEEN AS POSITIVE FOR THE CLIMATE AND ECONOMY BUT NOT NECESSARILY FOR EASING STRAIN OF COST OF LIVING

Since 2018, 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.

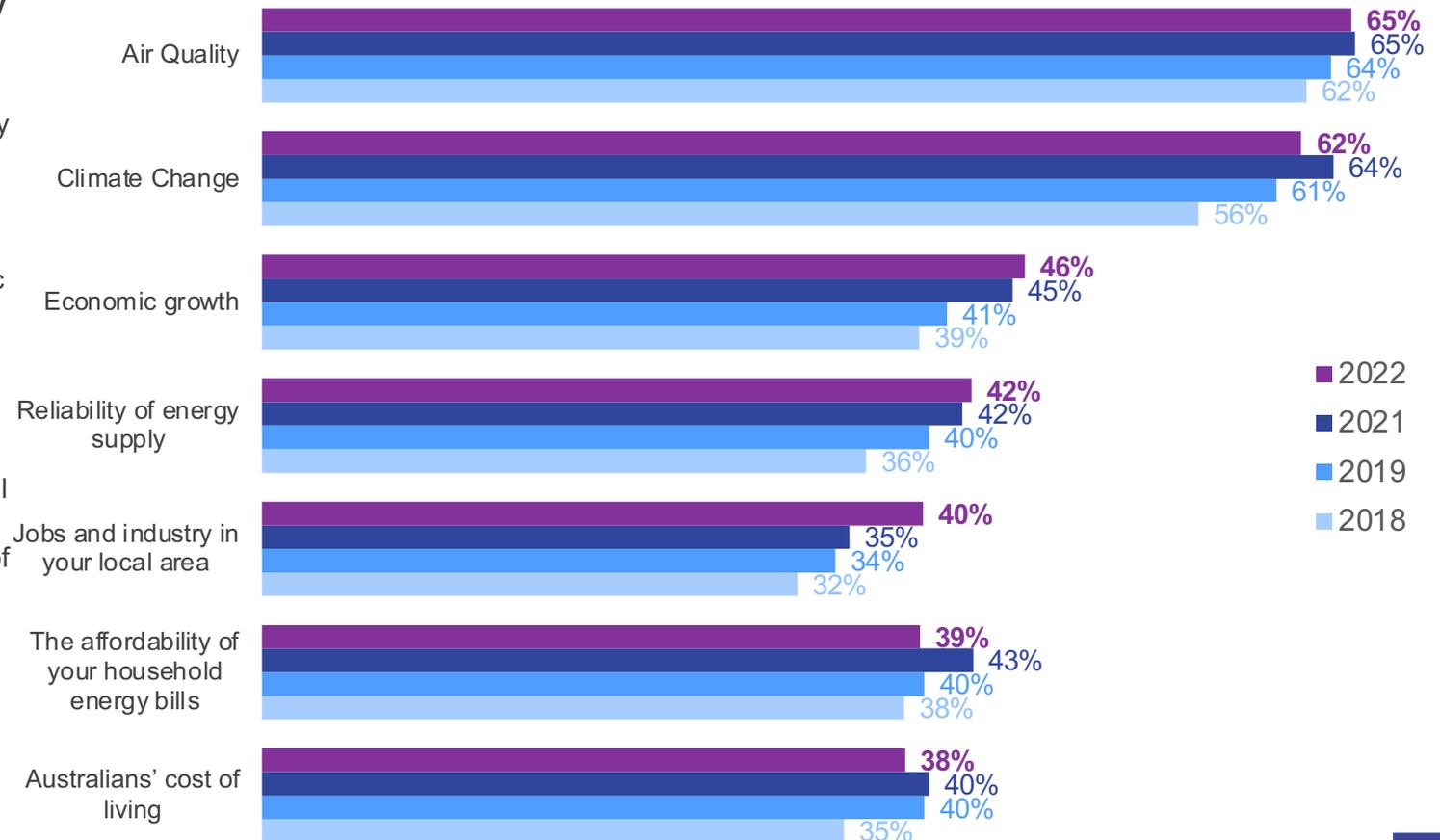
For Australians, improved environmental outcomes in air quality (65%) and climate change (62%) remain the areas in which moving to renewables would have the biggest positive impact.

In addition, there is increasing perceptions that moving to renewables will have other positive impacts including economic growth, reliability of energy supply and local jobs/industry.

However, there is less of a perceived direct link between a move to renewables and reducing strain on cost of living and household energy bills.

- In 2022, 39% of Australian consider a shift to renewables will have a positive impact on affordability of energy bills and 30% consider it will have a negative impact on affordability of energy.
- Likewise, 38% consider there will be a positive impact on cost of living while 31% consider there will be a negative impact on cost of living.

Proportion who think reducing the number of coal-fired power stations and increasing the amount of power generated from renewable energy sources will have a positive impact on ...





THE ROLE OF BUSINESSES

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AUSTRALIANS CONSIDER THE RESOURCES AND ENERGY SECTORS AS BEING ABLE TO HAVE THE GREATEST POSITIVE IMPACT

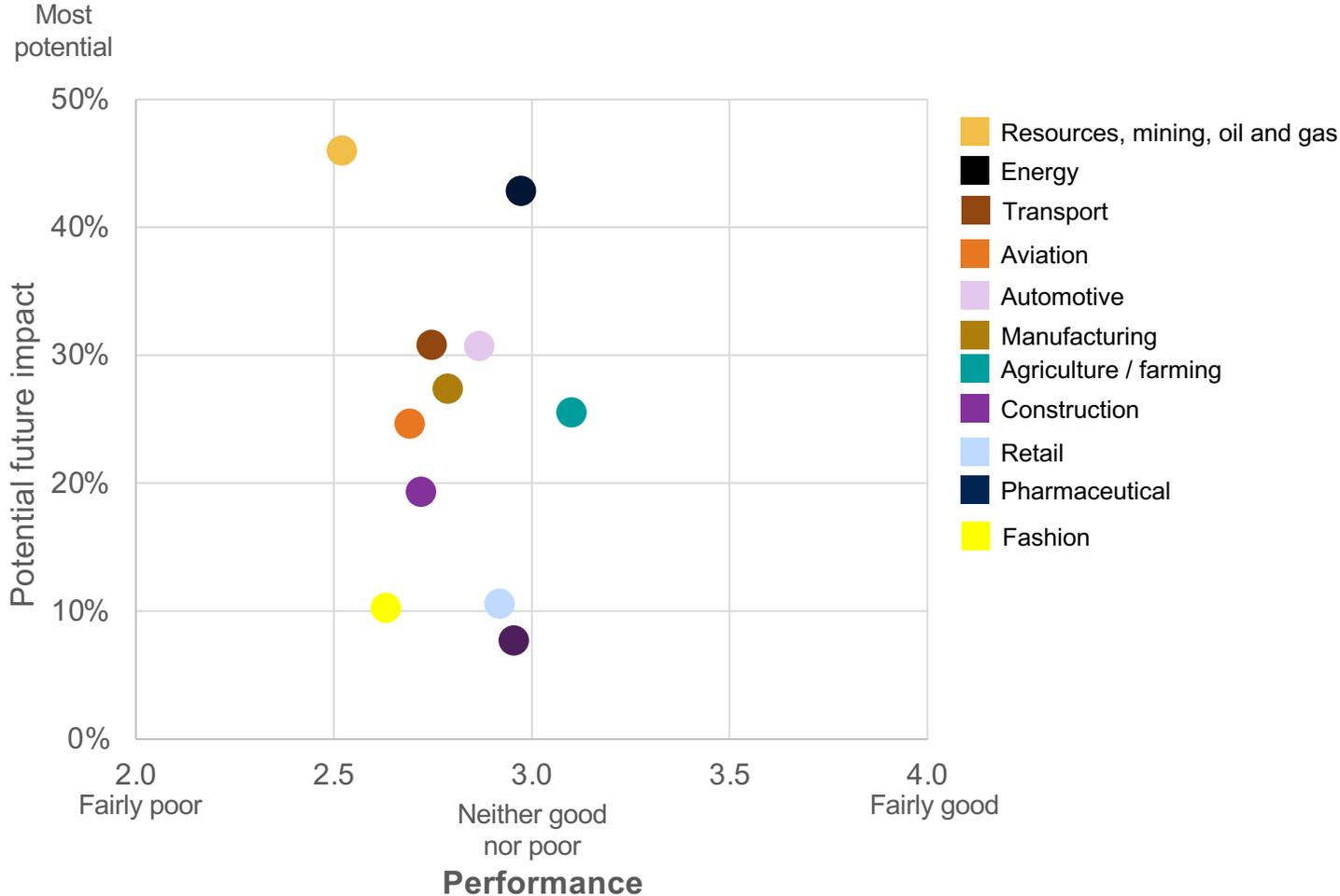
Two questions were asked to gauge perceptions of current performance and the degree of potential future impact that these industries have to make change on climate change.

The industries seen to be most able of having positive impact by taking action on climate change are the resource and mining sectors, energy, transportation and aviation.

Industries less commonly associated to emission outputs are perceived to have least ability to have positive impact – despite these sectors starting to consider and implement circular economy, product stewardship, improved logistics and end-of-life processes more actively.

Currently, Australians perceive that the industries of agriculture / farming and energy are slightly better performing when it comes to the action they have already taken in responding to climate change.

There is the greatest criticism of performance for the resources, mining, oil and gas sector.



IN ADDITION TO ACTION REQUIRED BY LEVELS OF GOVERNMENT, AUSTRALIANS CONSIDER BUSINESSES COULD HAVE REAL IMPACT ON CLIMATE CHANGE OUTCOMES

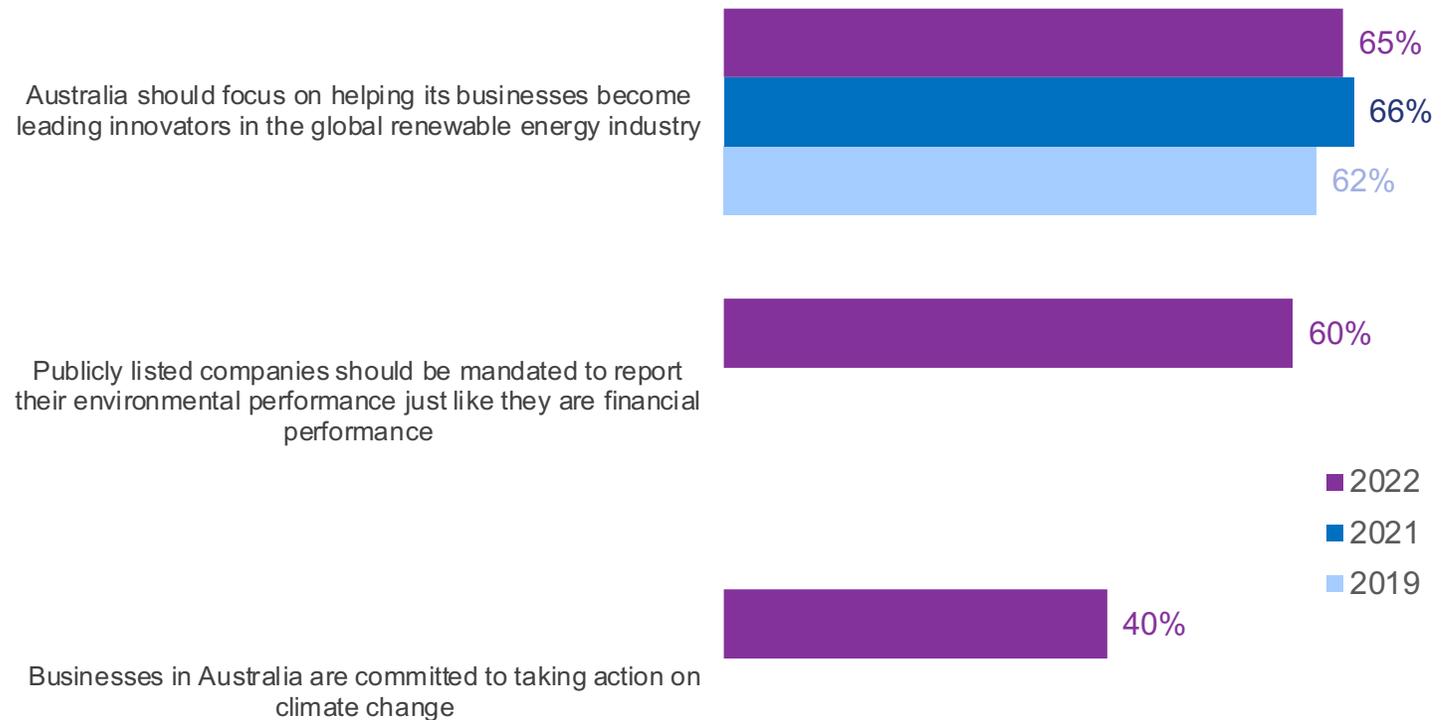
AUSTRALIAN'S PERCEPTIONS ON THE ROLE OF BUSINESSES (% Net Agreement)

In 2022, additional metrics related to business performance and expectations were included in the study.

In 2022, 40% of Australians agree that 'businesses in Australia are committed to taking action on climate change' with 21% disagreeing with this statement.

However expectations are high and it is the view of two thirds (65%) of Australians that 'Australia should focus on helping businesses become leading innovators in the global renewable energy industry'.

A similar proportion (60%) support mandated environmental performance figures for publicly listed companies.



Question: Below are some of the statements about climate change in Australia. Please keep in mind that to meet its commitments under the Paris climate agreement, Australia has to cut its carbon emissions by 26-28% below 2005 levels by 2030 and reach zero net emissions by 2050. Please indicate the extent to which you agree or disagree with the following. (2019-2022)



THE ROLE OF INDIVIDUALS

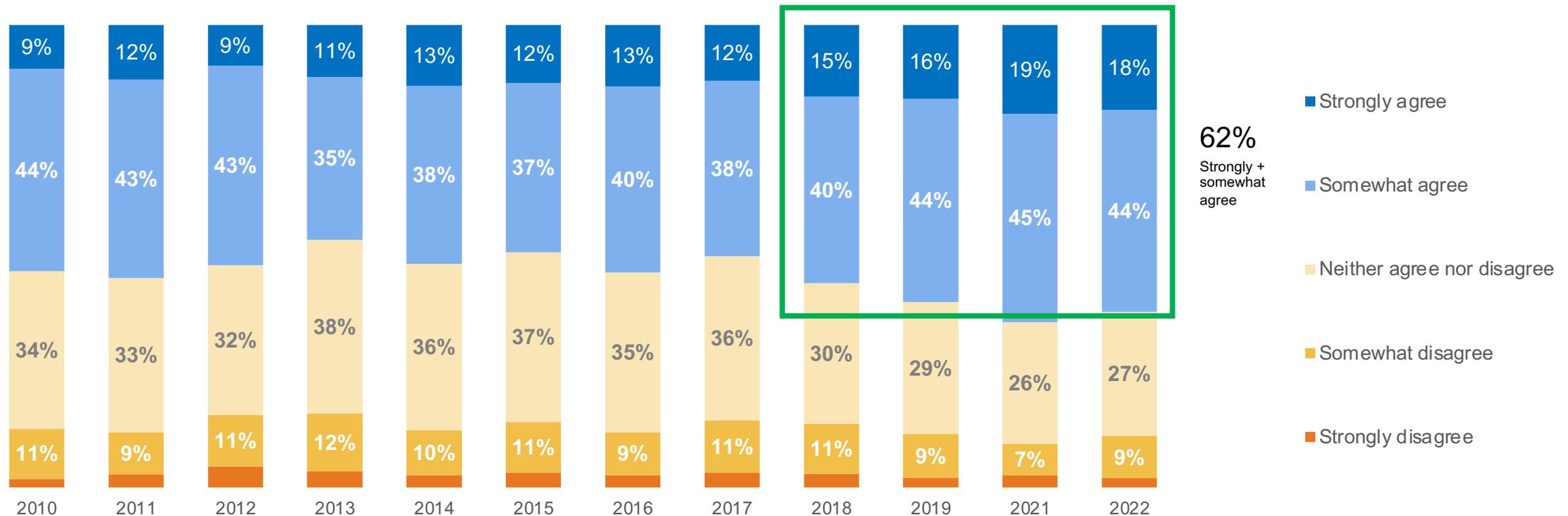
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SINCE 2018 MORE AUSTRALIANS ARE CONFIDENT THEY UNDERSTAND THE CAUSES AND IMPACTS OF CLIMATE CHANGE

When asked to self-assess their own level of understanding, 62% of Australians agree that they understand the causes and impacts of climate change. This has increased significantly from 2017 levels of 50% as more Australians who were falling into the undecided zone now perceive themselves to be more informed.

One in ten Australians do not believe they understand the causes and impacts of climate change.

PERCEIVED LEVEL OF UNDERSTANDING OF CLIMATE CHANGE AMONG AUSTRALIANS



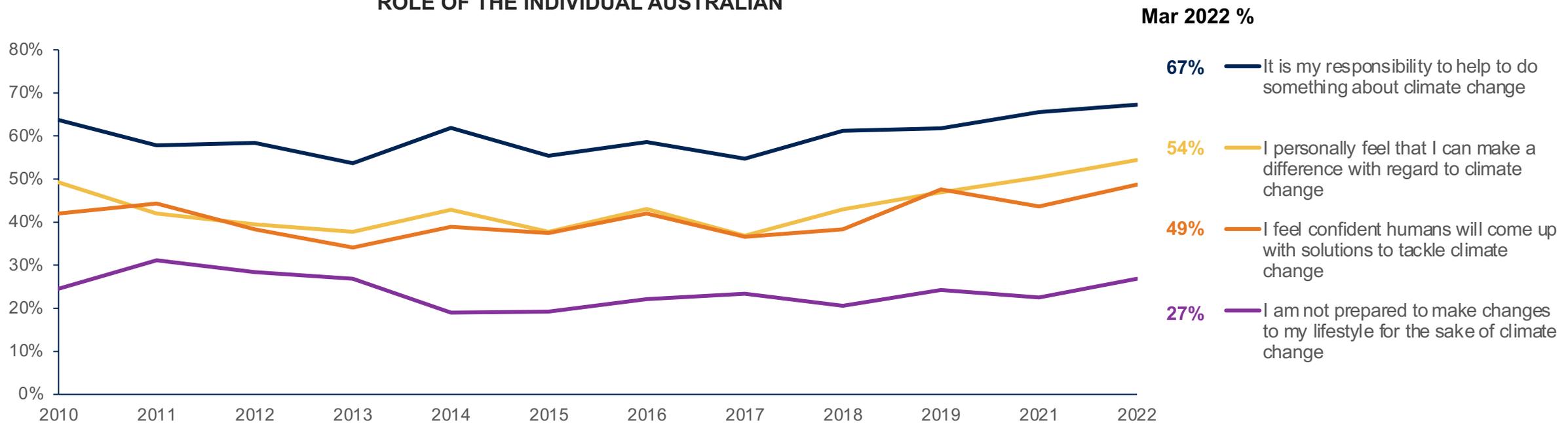
ALONG WITH AN INCREASED CONFIDENCE IN UNDERSTANDING CLIMATE CHANGE THERE IS AN INCREASE IN PERSONAL EMPOWERMENT AMONG AUSTRALIANS

In conjunction with the increases in agreement among Australians that they understand the causes and impacts of climate change, since 2018 there has been a gradual and increasing agreement with sentiments relating to feeling personally responsible and individually empowered.

Two thirds (67%) of Australians agree they have a responsibility to help do something, with a consistent 27% of Australians not being prepared to make changes to their lifestyle for the sake of climate change.

Although 54% now feel personally empowered to make a difference regarding climate change, a similar proportion (49%) are optimistic that humans will come up with solutions to tackle climate change. This belief in others, while positive, can be a barrier to taking personal action as there is a risk that Australians assume 'others' will be able to tackle the issue of climate change better than themselves leading to inaction at a personal level.

ROLE OF THE INDIVIDUAL AUSTRALIAN



IMPROVING HOUSEHOLD ENERGY EFFICIENCY AND USE AND ACTIVELY CONSIDERING PRODUCT LIFECYCLES ARE KEY ACTIONS THAT INDIVIDUALS ARE TAKING

Individuals take personal action in a number of ways. A series of different behaviours were prompted and Australians were asked whether they currently do this, would consider or would not consider these behaviours.

Household improvement decisions (installing solar and other energy efficient devices) are behaviours undertaken by approximately one third of Australians.

New to the prompted list this year, a statement was asked about active consideration to products being bought (including production, materials, end-of-life disposal). While concepts such as circular economy, product stewardship and end-of-life disposal are relatively new to consumers, 35% of Australians consider these elements in an active manner at least some of the time.

In contrast to prior years, the results for 2022 show a significant increase in adoption of solar panels (from 27% in 2019 to 34%) and in choosing a bank / investment / superannuation fund based on its environmental or green credentials and products (up from 10% in 2021 to 16%).

Reducing meat and dairy consumption and purchasing green energy are showing increasing trends over time.

LEVEL OF PERSONAL ACTION TAKEN BY AUSTRALIANS (BEHAVIOUR)



AUSTRALIANS ARE OPEN TO CHOOSING RENEWABLE ENERGY SOURCES BUT ARE NOT CERTAIN THIS WONT INCREASE ENERGY COSTS

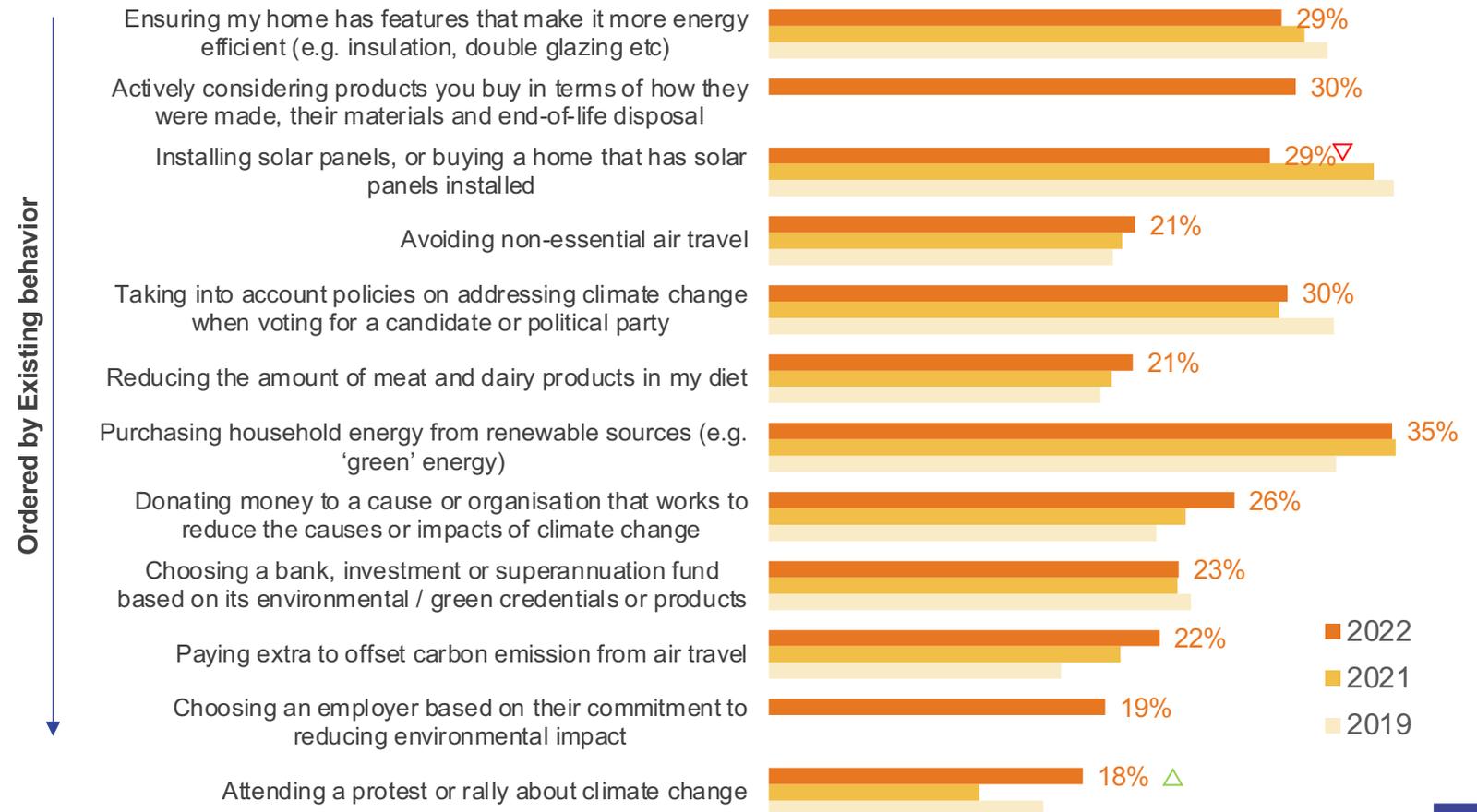
The top five behaviours currently being undertaken by Australians are also being considered to a high degree by those not currently acting in this way.

Other notable considerations:

- 35% are considering purchasing renewable energy.
- 30% are considering taking into account policies related to climate change when voting.
- There has been a significant increase this year in consideration of attending a protest or rally (up to 18% from 12% in 2021). Victorians are the most positive about the influence of protests and rallies on outcomes with 52% agreeing that 'climate activism on climate change can bring about positive change.

The high level of consideration of renewable energy may be hindered by a perception held by three in ten Australians that moving towards renewables is anticipated to have a 'minor or major negative impact' on household costs and energy costs (31% and 30% respectively).

ACTIONS BEING CONSIDERED BY AUSTRALIANS (POTENTIAL FOR ADOPTION)



Ordered by Existing behavior



■ 2022
■ 2021
■ 2019

△ Significantly higher than the prior year
▽ Significantly lower than the prior year



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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
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GAME CHANGERS

